

# Customers

1



## IN KEYBOARD SALES MODE:

To Add or edit customers, you can either go to Manager Mode or:

1. Select (F3) on your Keyboard.

(NOTE: Only Teachers & Managers will have access to Manager Mode)

# Customers

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POSitive Retail Manager - The Bluetique - Station: 1

Invoice: 1392 By: POS Cashier: POS Date: 11/29/2010 Register: 1 - PL: Our Price

SCAN: [Yellow Field]

Locate Item [INS] Menu [ESC]

Suspend [Pause] Recall Suspended

Description	Quantity	Price	Dsc.%	Total
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Locate Customer

Locate: [Input Field] go! ? [Icons] Select Cancel

Account	Code	Name
2	2	JONES, SALLY
3	3	Jones, Tom
4	4	Smith, Jane
1	1	TEACHER, MR.

SALLY JONES  
ROOM 123

Home:  
Work:

Account: 2 Code: 2

Find Authorized Buyer Add Edit More Detail

Bill To | Ship To | Note

Quick Sale [List]

Show More Options [F2] Select Bill To [F3] Customer History [F4] Logout [F5]

Adjust Quantity [F6] Time Clock [F7] Discount [F8] Void Transaction [F9]

Line Totals:	0.00	Sub Total:	0.00
Taxable:	0.00	Coupon:	0.00
Sales Tax:	0.00	Deposit:	0.00
Item Count:	0.00	Total:	0.00

0.00 Tender [F10]



## IN KEYBOARD SALES MODE:

To Add or edit customers, you can either go to Manager Mode or:

1. Select (F3) on your Keyboard.

# Customers

Invoice: 1393 By: POS Cashier: POS Date: 11/29/2010 Register: 1 - PL: Our Price

Sorted by: Name

Account	Code	Name
2	2	JONES, SALLY
3	3	Jones, Tom
4	4	Smith, Jane
1	1	TEACHER, MR.

Up  
Down  
Page Up  
Page Down

Search Email Map Sort By Account Add Edit Select

SALLY JONES  
ROOM 123  
Home:  
Work:  
Account: 2 Code: 2  
Terms: 30

Quick Sale

Line Totals:  
Taxable:  
Sales Tax:  
Item Count:

Authorized Buyers

Close

0.00

Customer List

Suspend

Retrieve

Invoice Prompt

Coupon

Delete Item

Tender



## IN TOUCH SCREEN SALES MODE:

To Add or edit customers, you can either go to Manager Mode or:

1. Touch Customer List Button

# Manager Mode (Customers)

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The screenshot displays the POSitive Retail Manager software interface. At the top, the title bar reads "POSitive Retail Manager - The Bluetique - Station: 1". Below the title bar is a menu bar with "File", "Edit", "Window", and "Help". A toolbar contains various icons for "Transactions", "Purchasing", "Accounting", "E-Commerce", "Management", and "Maintenance". The main area is a grid of 30 blue buttons, each with an icon and a label. A red arrow labeled "1" points to the "Customers" button. A separate "Manager Mode" button is shown on the left side of the grid.

Row	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
1	Touch Screen Sales	Keyboard Sales	Returns	Orders	Open Cash Drawer	Balance Cash Drawer
2	Employees	Department	Vendors	Inventory	Customers	House Accounts
3	Email Marketing	E-Commerce	Labels	Purchasing & Receiving	Credit Cards	Gift Cards
4	Time Clock	Reports	Graphs & Spreadsheets	Invoice History	Voids	Log In/ Log Out
5	POS Tips	POS Info	Setup & Utilities	Marketing Lessons	POS Help	Contact Us

**Manager Mode**

OR IN MANAGER MODE:

To Add or edit customers, go to Customers.

1. Select Customers Button

# Customers

The screenshot shows the POSitive Retail Manager interface. The main window is titled "Customer Center" and contains a table of customer accounts. A red arrow labeled "1" points to the "Add" button in the bottom right of the table area. Another red arrow labeled "2" points to the "Edit" button in the same area. The "Delete" button is also visible but has a red 'X' over it.

Account	Code	Name	Phone 1	Phone 2
2	2	JONES, SALLY		
3	3	Jones, Tom		
1	1	TEACHER, MR.		

Account Status:

Open Charges:	17.49
Open Credits:	0.00
Net Owed:	17.49
Credit Limit:	100.00

Summary:

Purchases:	566.40
# Of Invoices:	4
# Of Returns:	0
First Date:	8/19/2010
Last Date:	10/21/2010



## CUSTOMER CENTER

1. To Add a new customer (staff member) **Click ADD Button**
2. To Edit an existing Customer, Highlight the Customer and click the **EDIT button**

# Customers

The screenshot displays the POSitive Retail Manager interface. The main window is titled "Customer Center" and features a sidebar with "View" and "Actions" sections. The "View" section includes options like Summary, Detail, Shipping Address, Notes, Phones, Pending Transactions, Current Deposits, Purchase History, Statement History, Authorized Buyers, Picture Manager, and Documents. The "Actions" section includes Print, E-Mail, Add A Note, Customer Terms, and Customer Categories. The "Customer Categories" dialog box is open, showing a list of categories: STAFF, CLUBS-SPORTS TEAMS, EMPLOYEES, and STUDENTS. The "STAFF" category is highlighted. To the right of the list are fields for defining attributes: Zip Code, Area Code 1, Area Code 2, Tax Rate (set to State Sales Tax), Price Level (set to 1), Terms (set to 30), Discount (set to 0.00), Credit Limit (set to 100.00), and Address Format (set to United States). Below these fields are six user-defined field descriptions (Field 1 to Field 6). At the bottom of the dialog are buttons for Add, Edit, and Delete. A red arrow labeled "1" points to the "STAFF" category, and another red arrow labeled "2" points to the "Edit" button. A "Customers" icon is visible in the bottom left corner of the slide.

## CUSTOMER LIST:

**When you add a Customer, you will be prompted to select a Customer Category:**

1. For this lesson we will be adding a Teacher as a Customer, so highlight **Staff Category**
2. To Edit the properties of a Customer Category, click the **EDIT button** (bottom right corner)
  - You can define the default attributes for all **Staff Customers**:
  - Example: Auto % Discounts, House Charge \$\$ Credit limit/terms
  - Advance Marketing Report Options (6-fields available); Example: Birth Month = user-defined field 1

# Customers

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The screenshot displays the POSitive Retail Manager interface. The main window is titled "Customer Center" and features a sidebar with "View" and "Actions" sections. The "View" section includes options like Summary, Detail, Shipping Address, Notes, Phones, Pending Transactions, Current Deposits, Purchase History, Statement History, Authorized Buyers, Picture Manager, and Documents. The "Actions" section includes Print, E-Mail, Add A Note, Customer Terms, and Customer Categories. A "Customer Categories" dialog box is open, showing a list of categories: STAFF, CLUBS-SPORTS TEAMS, EMPLOYEES, and STUDENTS. The "CLUBS-SPORTS TEAMS" category is highlighted in yellow. A red arrow labeled "1" points to the "Select" button in the dialog box. The dialog box also contains fields for Zip Code, Area Code 1, Area Code 2, Tax Rate, Price Level, Terms, Discount, Credit Limit, and Address Format. The "Update Existing Customers" button is visible at the bottom of the dialog box.



## CUSTOMER LIST:

1. Once you select the Customer Category, choose the select button to continue

# Customers

**Customer Center**

View: Detail, Shipping Address, Notes, Phones, Authorized Buyers, Picture Manager, Documents

Actions: Add A Note, Save, Cancel

Locate:  go!

Account	Code	Name	Phone 1	Phone 2
2	2	JONES, SALLY		
3	3	Jones, Tom		
1	1	TEACHER, MR.		

Msg [F12] Save Cancel

Account:  Lookup Code:  Title:

First Name:  Last Name:

Company:

Address 1:  Address 2:

City:  State:

Zip Code:  +4:

Country:

Home:  Work:

Cell Phone:  E-Mail:

Add To E-Mail Mailing List

B-DAY (##)

Options | Terms | Other

Assigned Sales ID:  Category:  Price Level:  Tax Group:  Resale Number:  Driver's License:



## ADDING NEW CUSTOMER:

1. POS will auto-add an Account & Lookup Code # . Option: Enter Staff ID# (scan barcode) in lookup code for fast customer lookup in Sales.
2. Add a Room number if you plan on offering house-charge (AR) privileges.
3. These fields are automatically (default) selected for you. Do nothing here.
4. Enter the Month the teacher was born (i.e. Jan = 01, Dec = 12)
  - Ignore this field if you do not wish to use Birthday reports for staff (advance marketing)
5. Click Save to save Customer File settings.

# Customers

POSitive Retail Manager - The Bluetique - Station: 1

File Edit Window Help

Transactions Purchasing Accounting E-Commerce Management Maintenance

Customer Sale Quick Sale Return Exit Manager Mode AR Payments Inquiry Retrieve Create Pending Calendar Invoice History Open Register Balance Register Clock In/Out Logout Essentials

Customer Center

View

- Summary
- Detail
- Shipping Address
- Notes
- Phones
- Pending Transactions
- Current Deposits
- Purchase History
- Statement History
- Authorized Buyers
- Picture Manager
- Documents

Actions

- Print
- E-Mail
- Add A Note
- Customer Terms
- Customer Categories

Locate:  go! ?

Create New Transaction [F4] Close

Account	Code	Name	Phone 1	Phone 2
2	2	JONES, SALLY		
3	3	Jones, Tom		
4	4	Smith, Jane		
1	1	TEACHER, MR.		

Msg [F12] Add Edit Delete

Account:

Lookup Code:  Title:

First Name:  Last Name:

Company:

Address 1:

Address 2:

City:  State:

Zip Code:  +4:

Country:

Home:

Work:

Cell Phone:

E-Mail:

Add To E-Mail Mailing List

B-DAY (##)

Options | Terms | Other

Assigned Sales ID:

Category:

Price Level:

Tax Group:

Resale Number:

Driver's License:

Customers

## PRINT CUSTOMER REPORT:

1. Print a customer list, mailing labels, or a (query) Birth Month report

# Customers

The screenshot shows the POSitive Retail Manager interface. The main window is titled "Customer Center" and displays a list of customers. A "Customer Print Setup" dialog box is open over the list, showing options for printing. The "Report" option is selected, and the "OK (F10)" button is highlighted. Red arrows labeled "1" and "2" point to these elements respectively.

**Customer Center Window:**

- View:** Summary, Detail, Shipping Address, Notes, Phones, Pending Transactions, Current Deposits, Purchase History, Statement History, Authorized Buyers, Picture Manager, Documents.
- Actions:** Print, E-Mail, Add A Note, Customer Terms, Customer Categories.

**Customer List Table:**

Account	Code	Name	Phone 1	Phone 2
2	2	JONES, SALLY		
3	3			
4	4			
1	1			

**Customer Print Setup Dialog:**

- Options:** Mailing Labels (selected), Report, Export, Customer File, Bill-To Label.
- Buttons:** OK (F10), Cancel.



## PRINT CUSTOMER LIST

1. Select Report
2. Click OK (F10) to proceed

# Customers

The screenshot shows the POSitive Retail Manager interface. The main window is titled "Customer Center" and contains a list of customer accounts. A "Custom Reports" dialog box is open over the list, showing a table with columns for "Report Description" and "BIRTHDAY REPORT". The dialog has buttons for "New...", "Copy...", "Modify...", "Rename...", "Delete", "Select", and "Close". Red arrows labeled "1" and "2" point to the "Select" and "New..." buttons respectively. The background window shows various menu options like "Transactions", "Purchasing", "Accounting", "E-Commerce", "Management", and "Maintenance".



## PRINT CUSTOMER LIST:

### Custom Reports Appear

1. Click Select to print all of your customers
2. Or Click New to create a new query

# Customers

POSITIVE Retail Manager - The Bluetique - Station: 1

File Edit Window Help

Transactions Purchasing Accounting E-Commerce Management Maintenance

Customer Sale Quick Sale Return Exit Manager Mode AR Payments Inquiry Retrieve Create Pending Calendar Invoice History Open Register Balance Register Clock In/Out Logout Essentials

Customer Center

View

Summary

Detail

Shipping Address

Notes

Phones

Pending Transactions

Current Deposits

Purchase History

Statement History

Authorized Buyers

Picture Manager

Documents

Actions

Print

E-Mail

Add A Note

Customer Terms

Customer Categories

Locate: go! ?

Create New Transaction [F4] Close

Account	Code	Name	Phone 1	Phone 2
2	2	JONES, SALLY		
3	3	Jones, Tom		
4	4	Smith, Jane		
1	1	TEACHER, MR.		

Msg [F12] Add Edit Delete

Query Wizard

Would you like to apply a query to this report?

Yes No

Account: 4

Lookup Code: 4

First Name: Jane

Company:

Address 1: Room 123A

Address 2:

City: State:

Zip Code: +4:

Country:

Home: Work:

Cell Phone: E-Mail:

Add To E-Mail Mailing List

B-DAY (##) 12

Options Terms Other

Assigned Sales ID: POS

Category: STAFF

Price Level: Our Price

Tax Group: State Sales Tax

Resale Number:

Driver's License:

Customers

## PRINT CUSTOMER LIST:

### Custom Reports Appear

1. Click No to print all of your customers
2. Or Click Yes to print a query report by birthdays, ect.

# Customers

The screenshot shows a software interface with a 'Customer Center' window. A 'Saved Queries' dialog box is open, displaying a list of queries. The 'DECEMBER B-DAYS' query is highlighted. The dialog box has buttons for 'New...', 'Copy...', 'Modify', 'Rename...', 'Delete', 'Select', and 'Close'. Red arrows point to the 'Select' button (labeled 1) and the 'New...' button (labeled 2).

Account	Code	Name	Phone 1	Phone 2
2	2	JONES, SALLY		
3	3	Jones, Tom		

Detail:

SALLY JONES  
ROOM 123

Home:  
Work:

Account: 2 Code

User-Defined Field  
B-DAY (###)

Open Charges: 18.00  
Open Credits: 0.00  
Net Owed: 18.00  
Credit Limit: 100.00

Purchases: 584.40  
# Of Invoices: 5  
# Of Returns: 0  
First Date: 8/19/2010  
Last Date: 10/28/2010



## PRINT CUSTOMER LIST:

### Custom Reports Query

If you clicked yes, your saved Queries appear.

1. Highlight Query and click **Select**
2. Or **Select New**

# Customers

Report Preview

File

Page: 1 of 1 Step: 20

Pages To Print: Search: Copies: 1

Page	Size
1	3.688

**BIRTHDAY REPORT**

*Confidential*

Customer Name

JONES, SALLY  
Jones, Tom  
Smith, Jane  
TEACHER, MR.

Zoom: 120% 1 pages, 3.6Kb



## CUSTOMER LIST & REPORT

Please Review Carefully for Errors

(NOTE: Contact our office if you wish to remove a Customer)

NOTE: You can also print Customer Report in Report Center