Customers

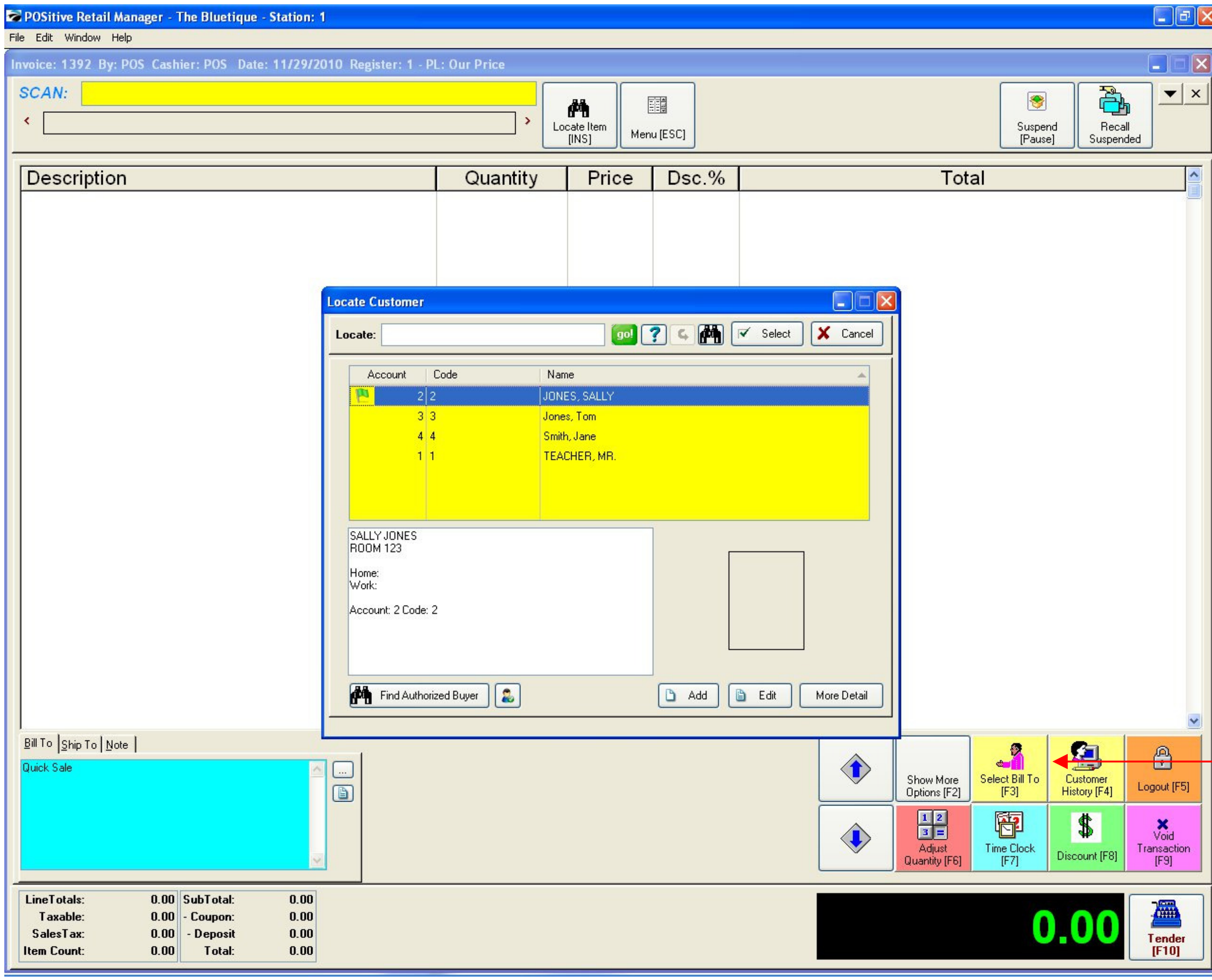
IN KEYBOARD SALES MODE:

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

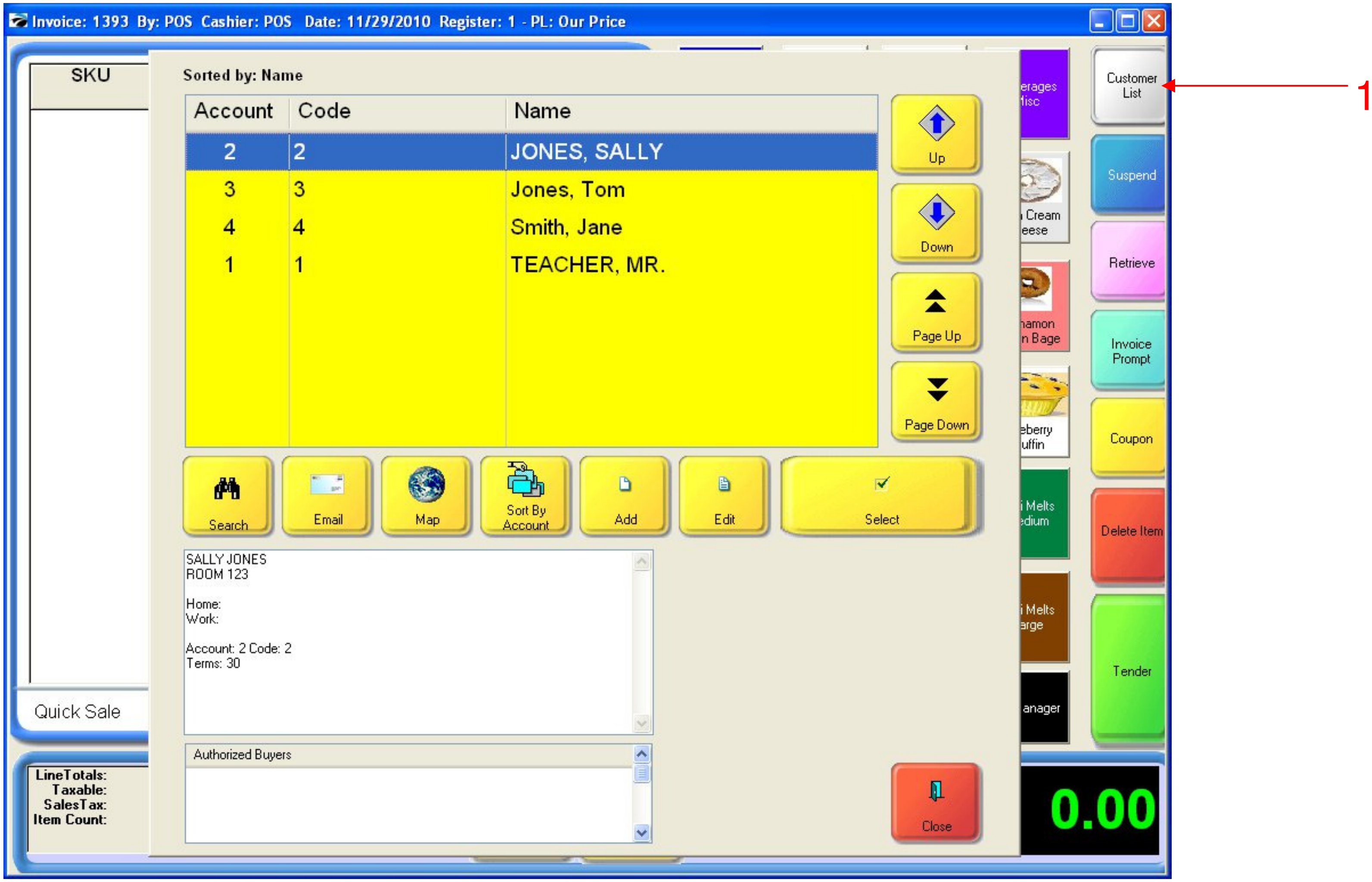


IN KEYBOARD SALES MODE:

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

1. Select (F3) on your Keyboard.

Customers



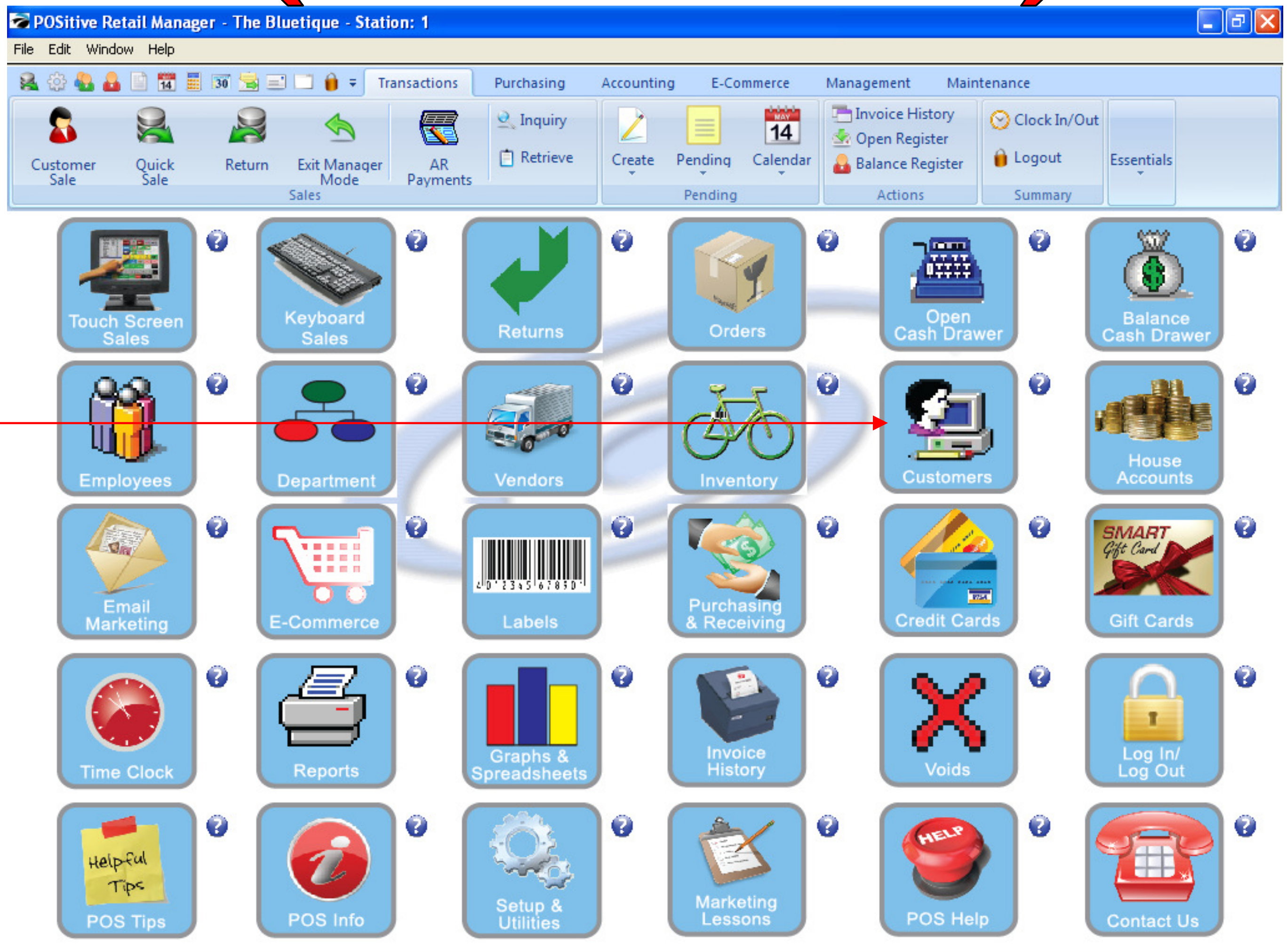
IN TOUCH SCREEN SALES MODE:

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

1. Touch Customer List Button

Manager Mode (Customers)

1

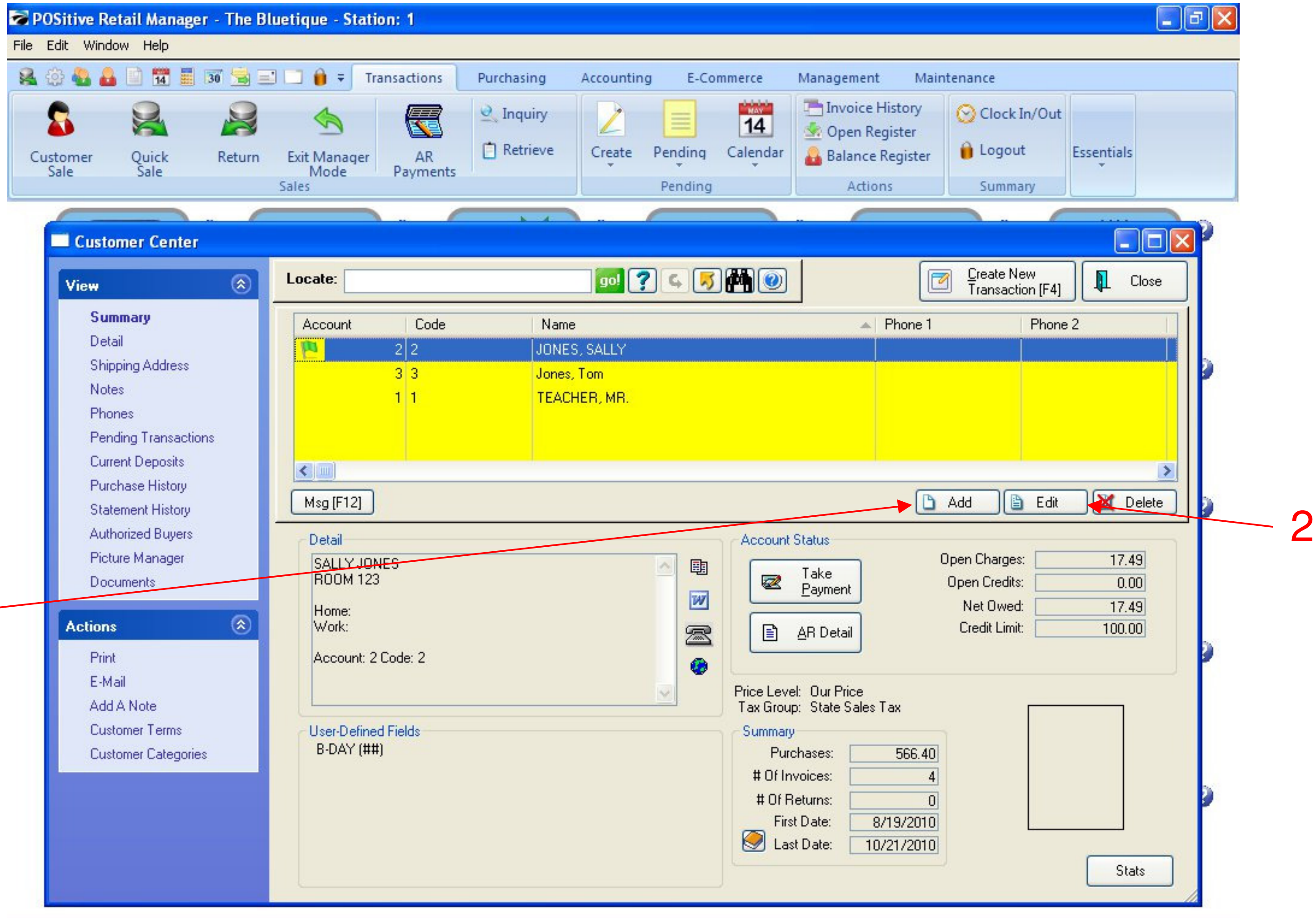


OR IN MANAGER MODE:

To Add or edit customers, go to Customers.

1. Select Customers Button

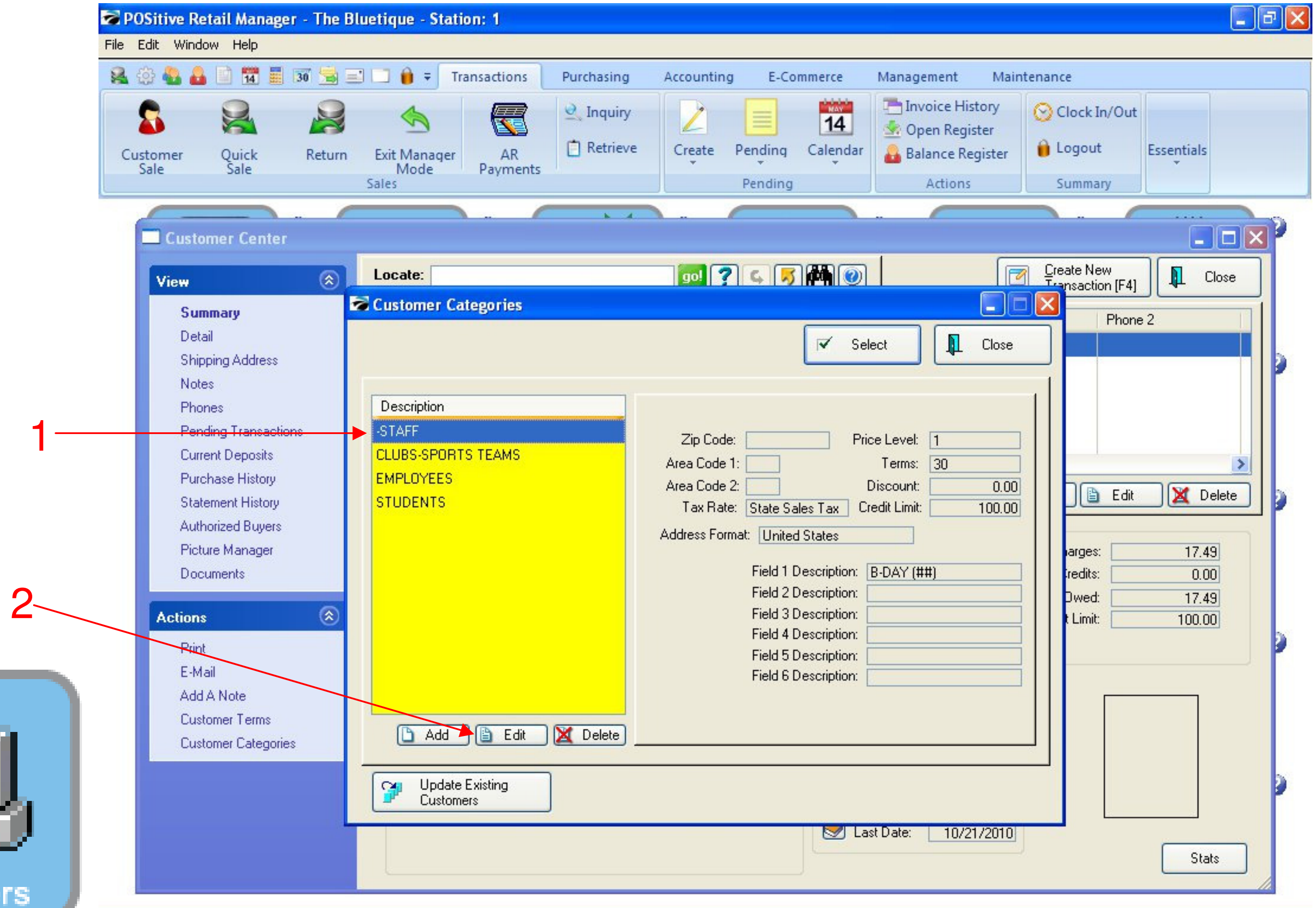
Customers



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

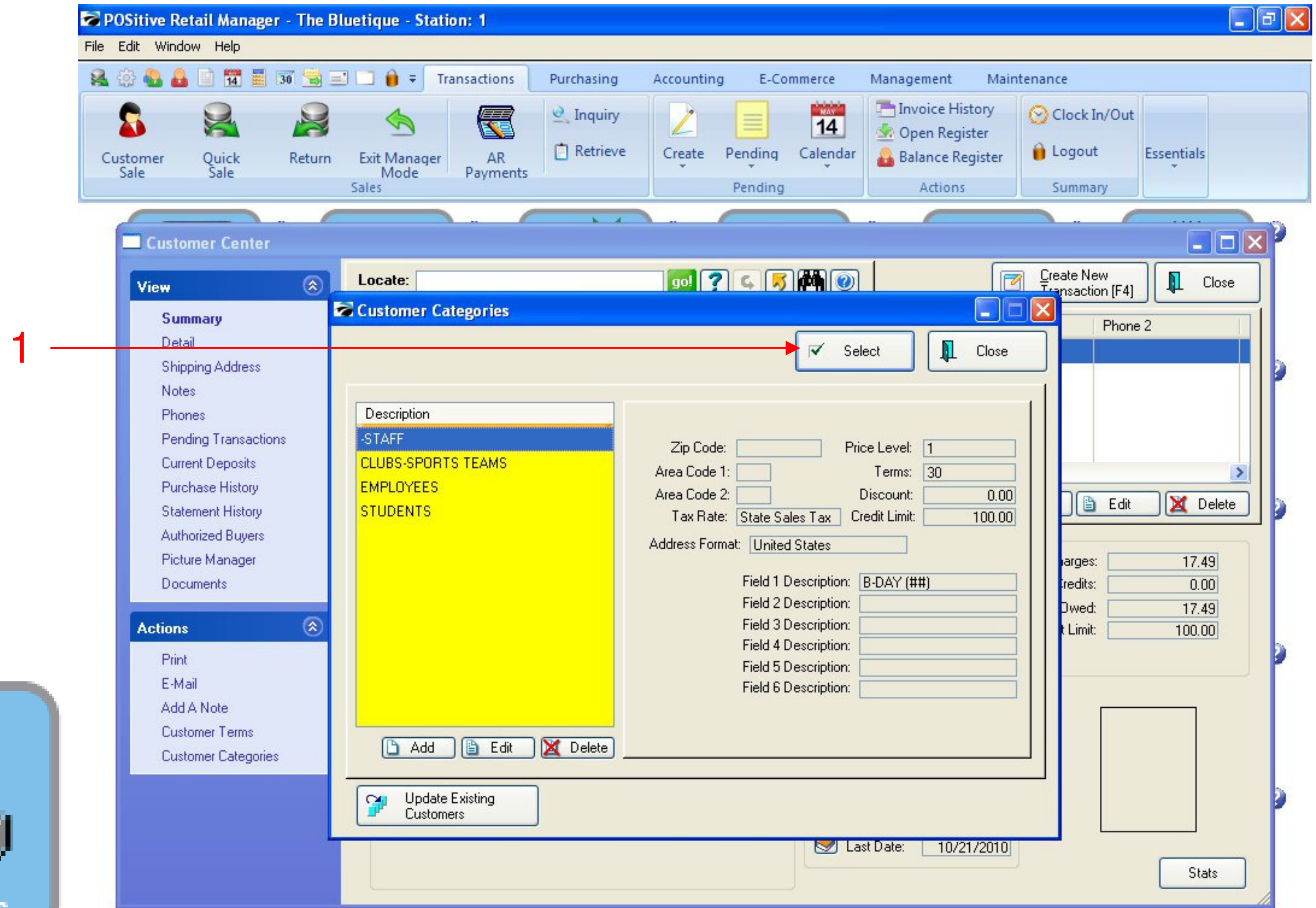


CUSTOMER LIST:

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

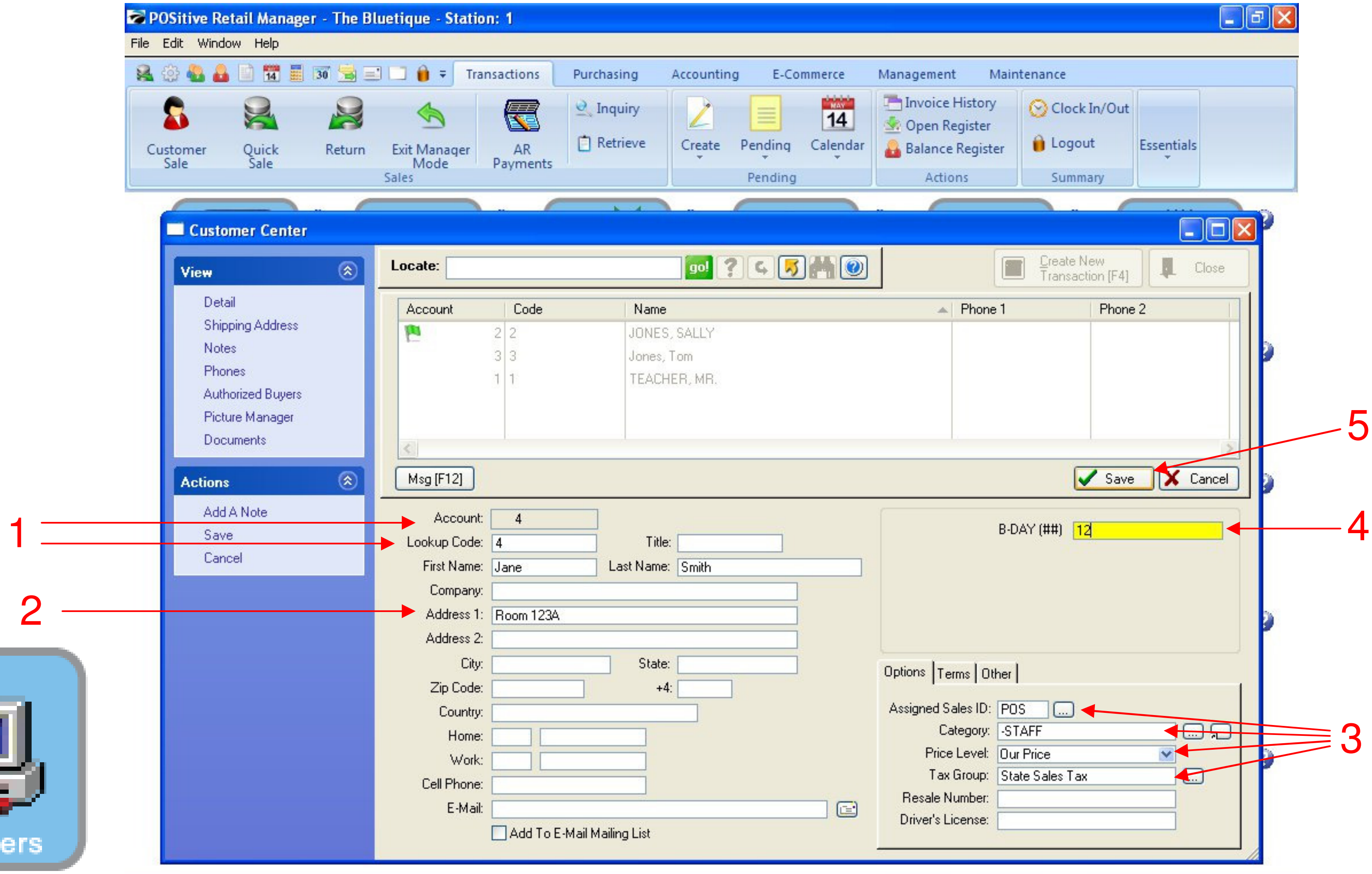
Customers



CUSTOMER LIST:

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

Customers

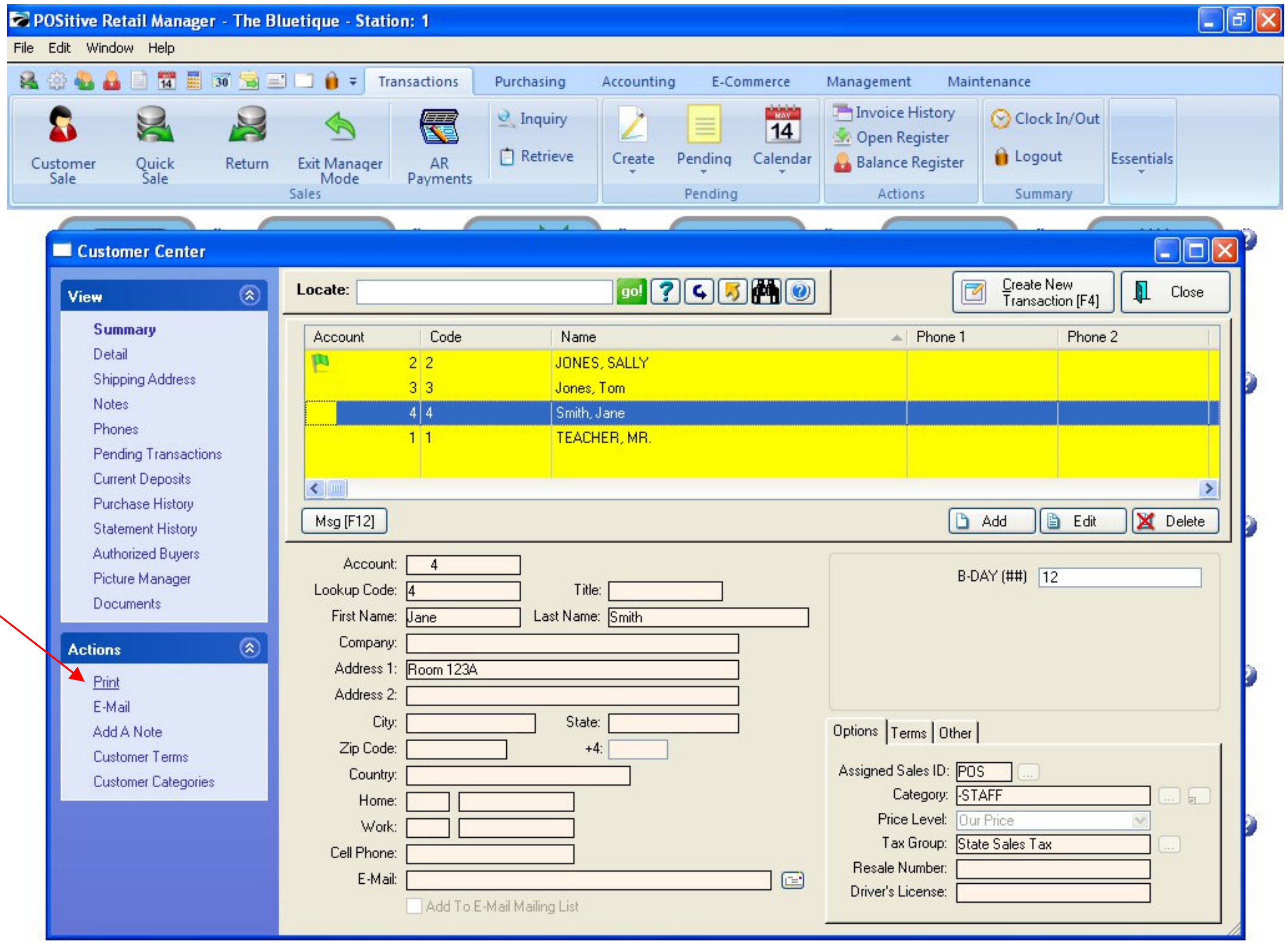


ADDING NEW CUSTOMER:

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

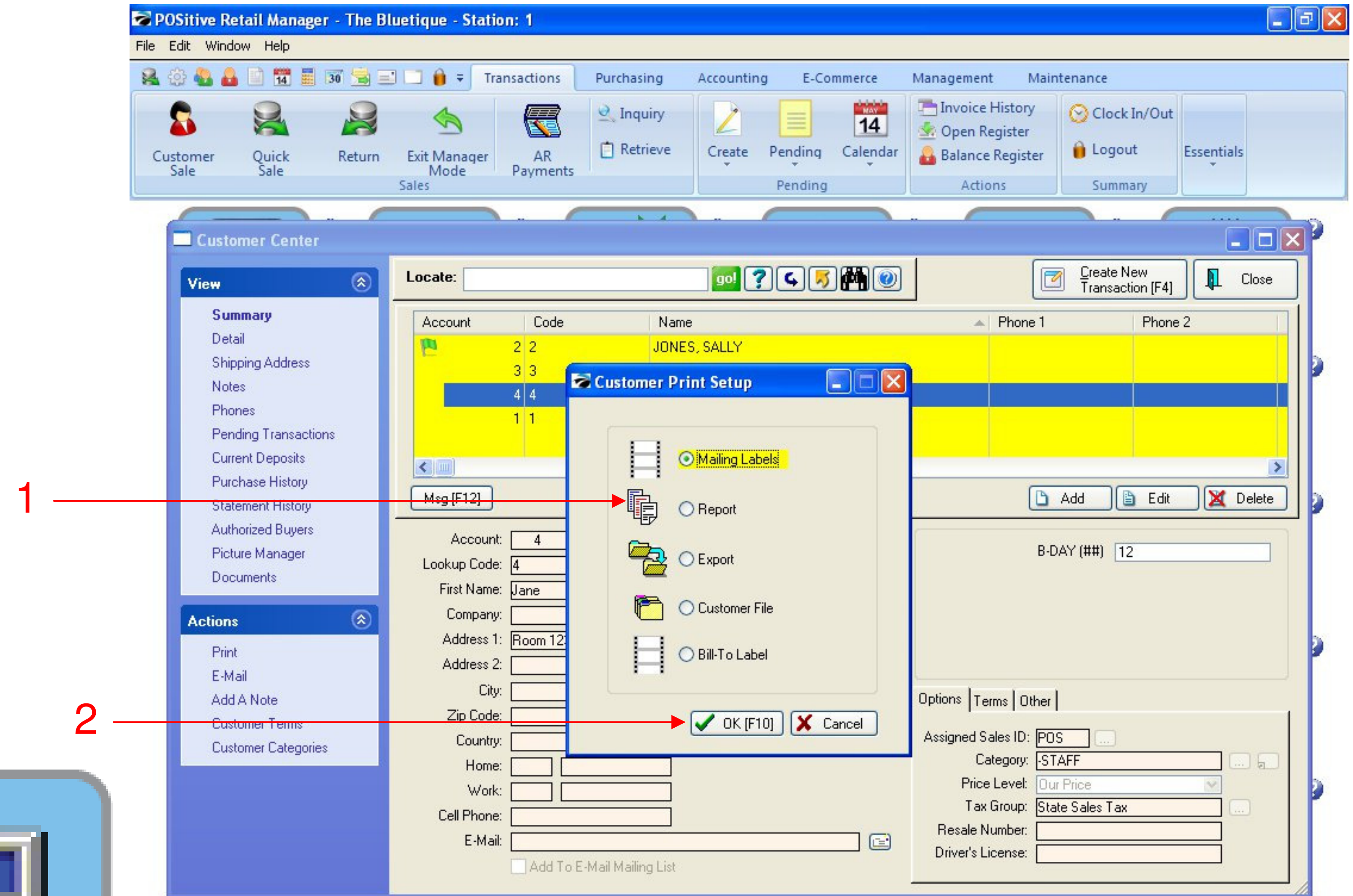
1



PRINT CUSTOMER REPORT:

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

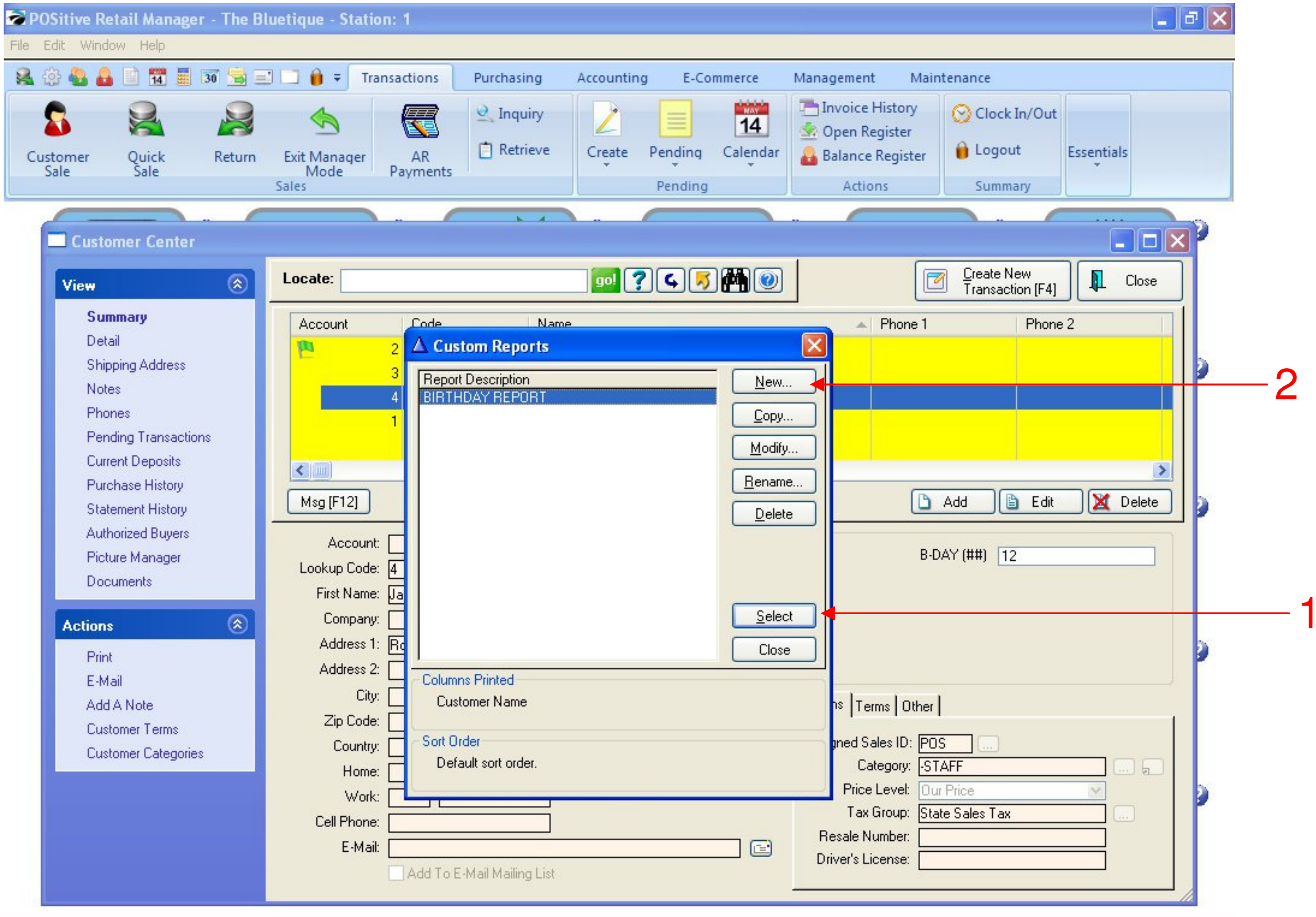
Customers



PRINT CUSTOMER LIST

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

Customers

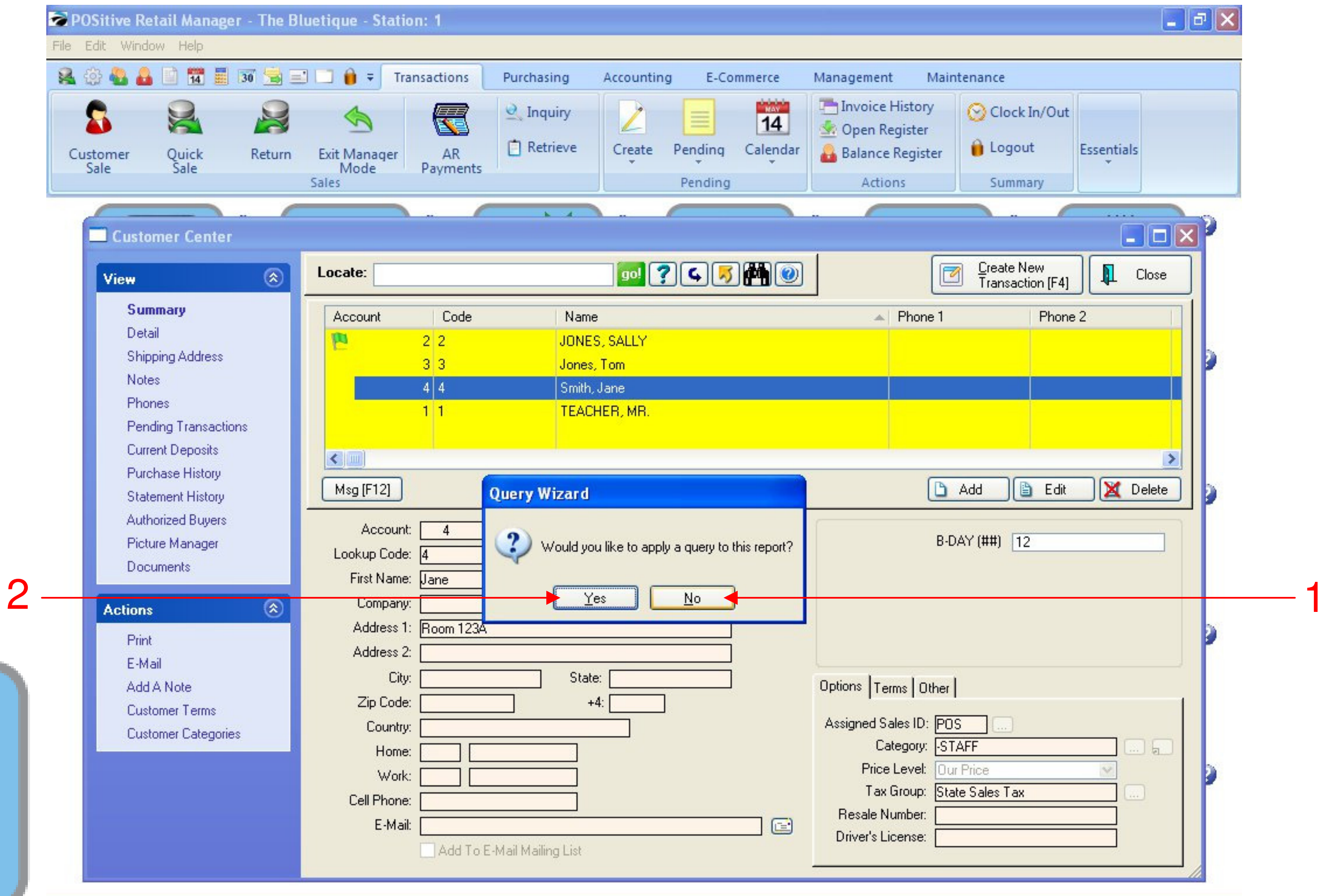


PRINT CUSTOMER LIST:

Custom Reports Appear

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

Customers

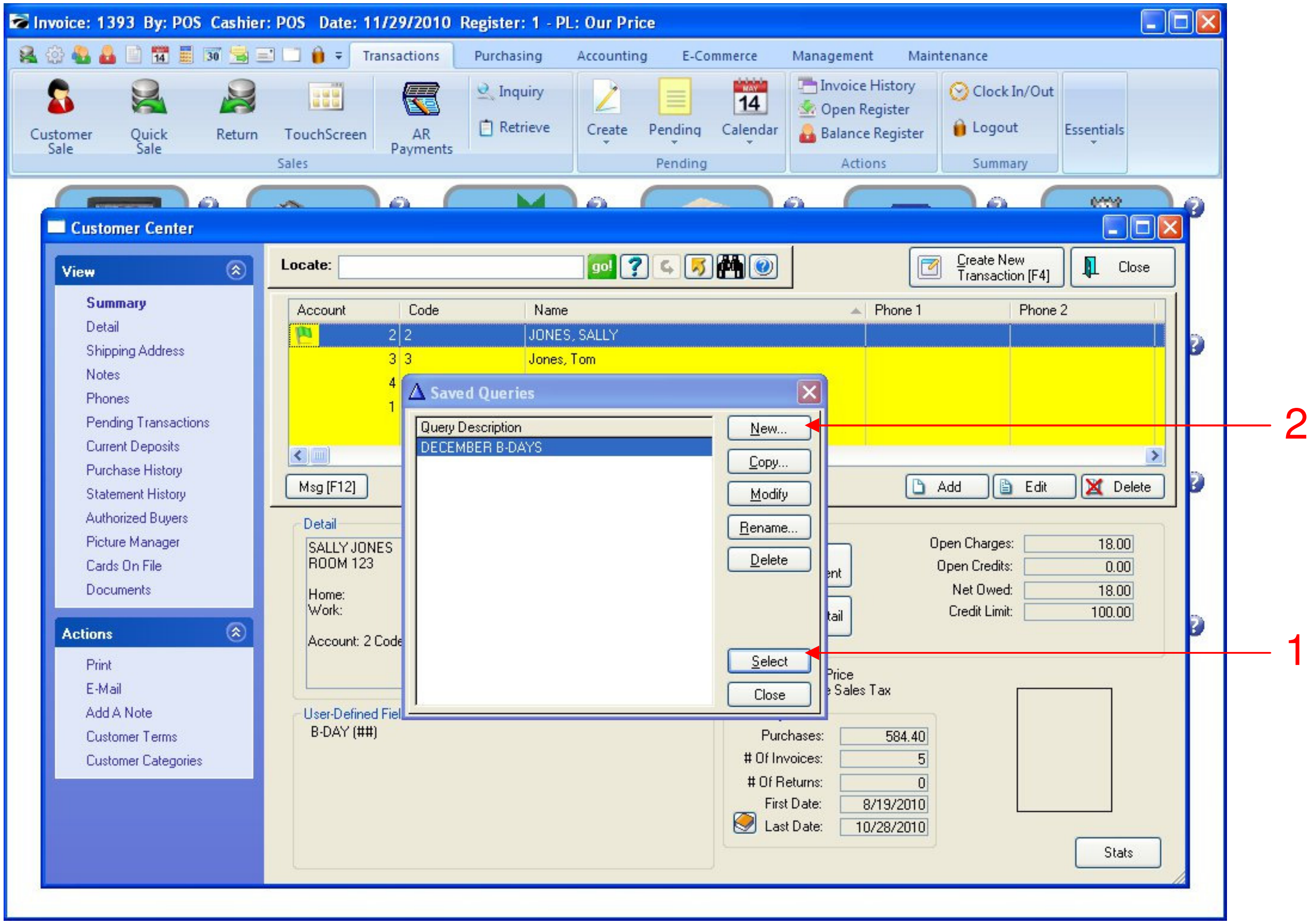


PRINT CUSTOMER LIST:

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



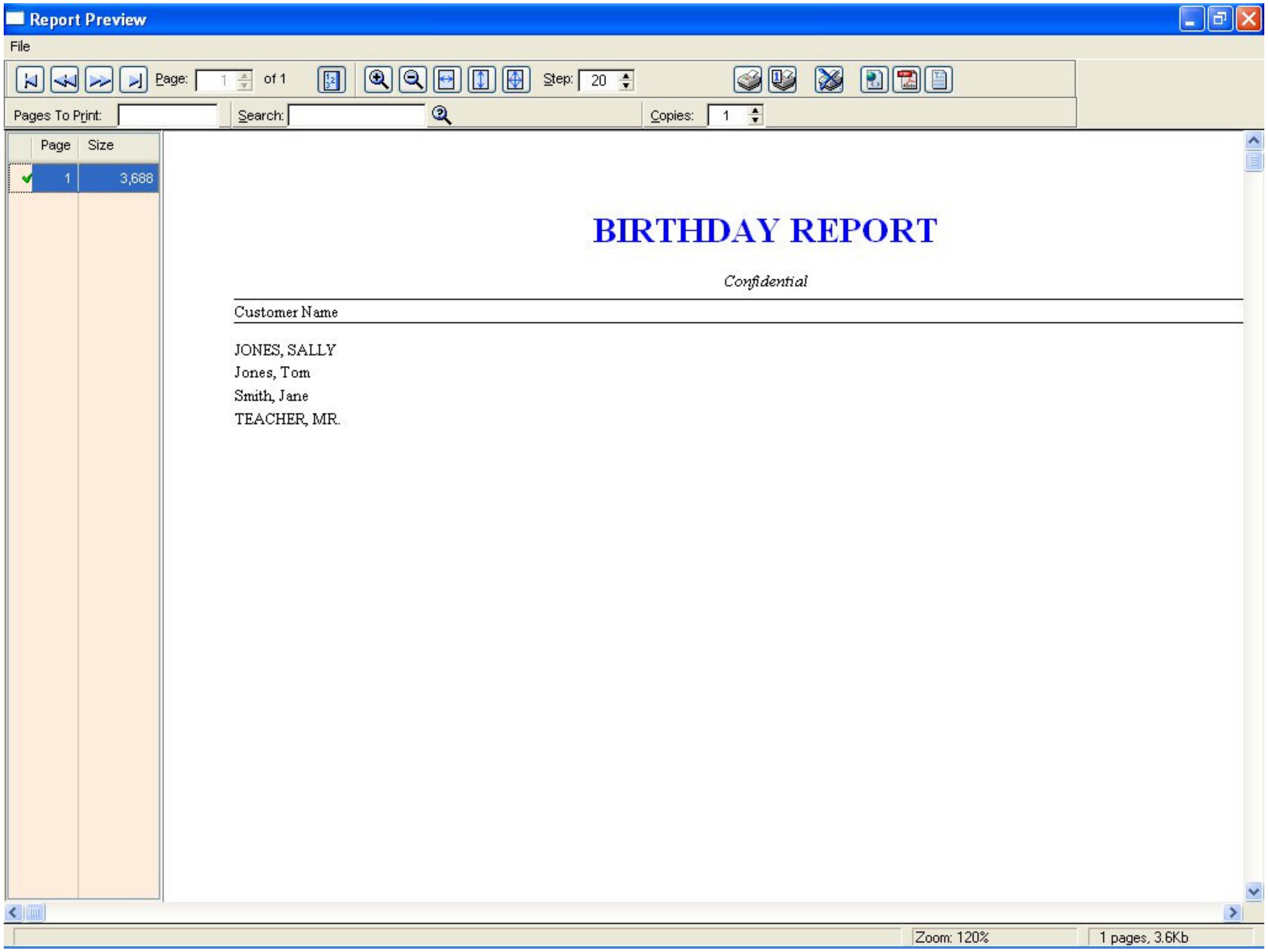
PRINT CUSTOMER LIST:

Custom Reports Query

If you clicked yes, your saved Queries appear.

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

Customers



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