

### To add or edit a Customer File:

- At any Work Center, locate Customer button at right corner of Console (F8)

#### 1. Click CUSTOMERS button (F8)

POSitive For Windows - The Dog Pound - Station: 1

File Edit Register Inventory Management Marketing Accounting Utilities Window Help

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**Customer List**

Menu [F11] Find [F5] Add Note [F6] Print [F7] E-Mail [F8] Inv. History Create

To Search, type the first few characters of the Customer Name Auth. Buyers

Acnt [F2]	Code [F3]	>Name [F4]	Phone
1	123456	Employee, Student	
3	3	Football Team Varsity	
2	2	Teacher, Nice	

AB Stats

Credit Condition

Open Chrgs: 0.00

Open Credits: 0.00

Net Owed: 0.00

Credit Limit: 0.00

Select Ship To Add Edit Delete Take Payment AR Detail

Account: 1 Code: 123456  
Student Employee  
1st Hour

Home: Work:

Birth Month (##) 11

Price Level: Our Price

Msg [F12] Map

^General ^Details ^Notes ^Phones Pending ^History ^Terms ^Buyers Erequent Buyer Close

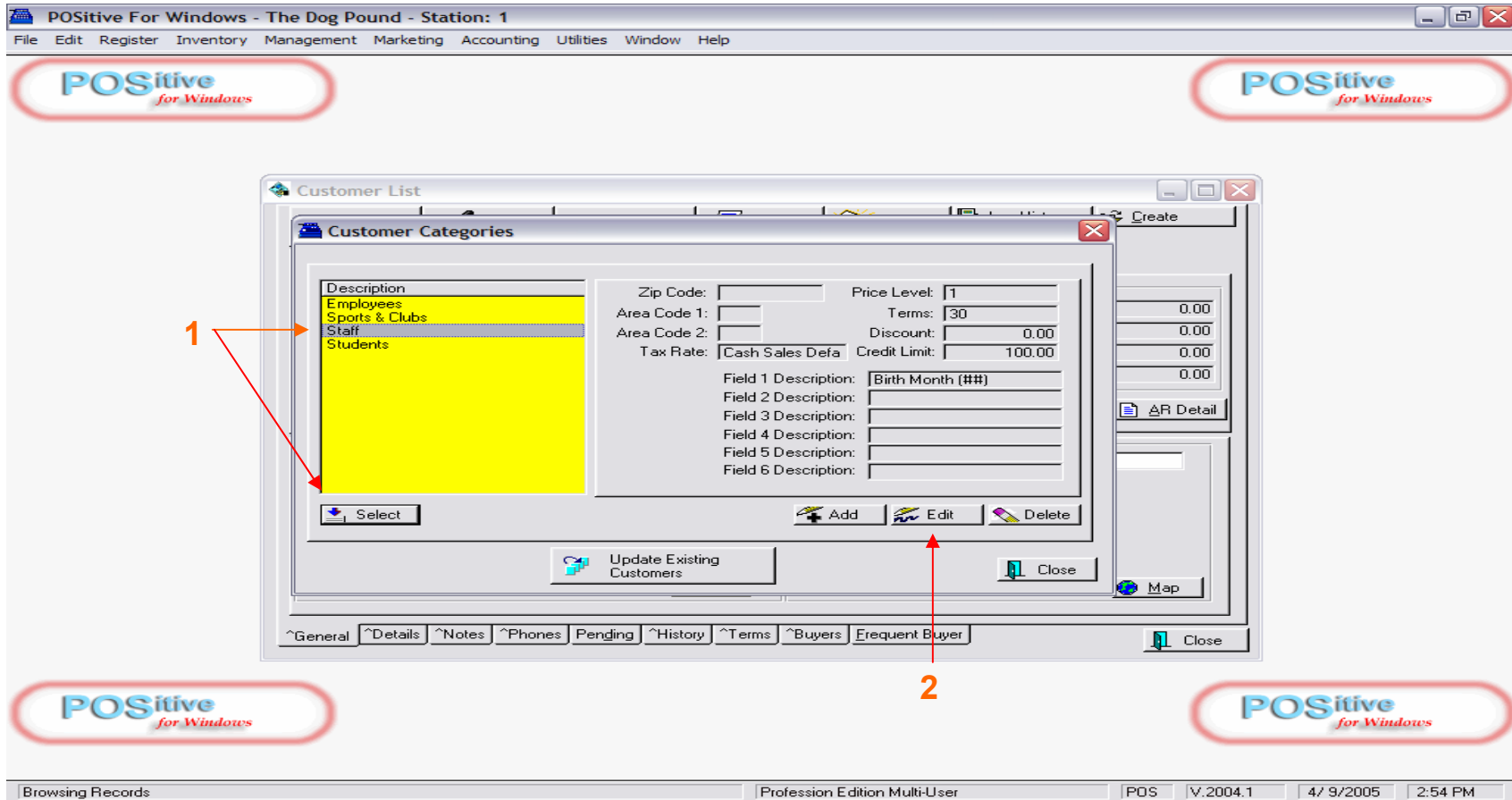
**POSitive**  
for Windows

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Browsing Records Profession Edition Multi-User POS V.2004.1 4/ 9/2005 2:45 PM

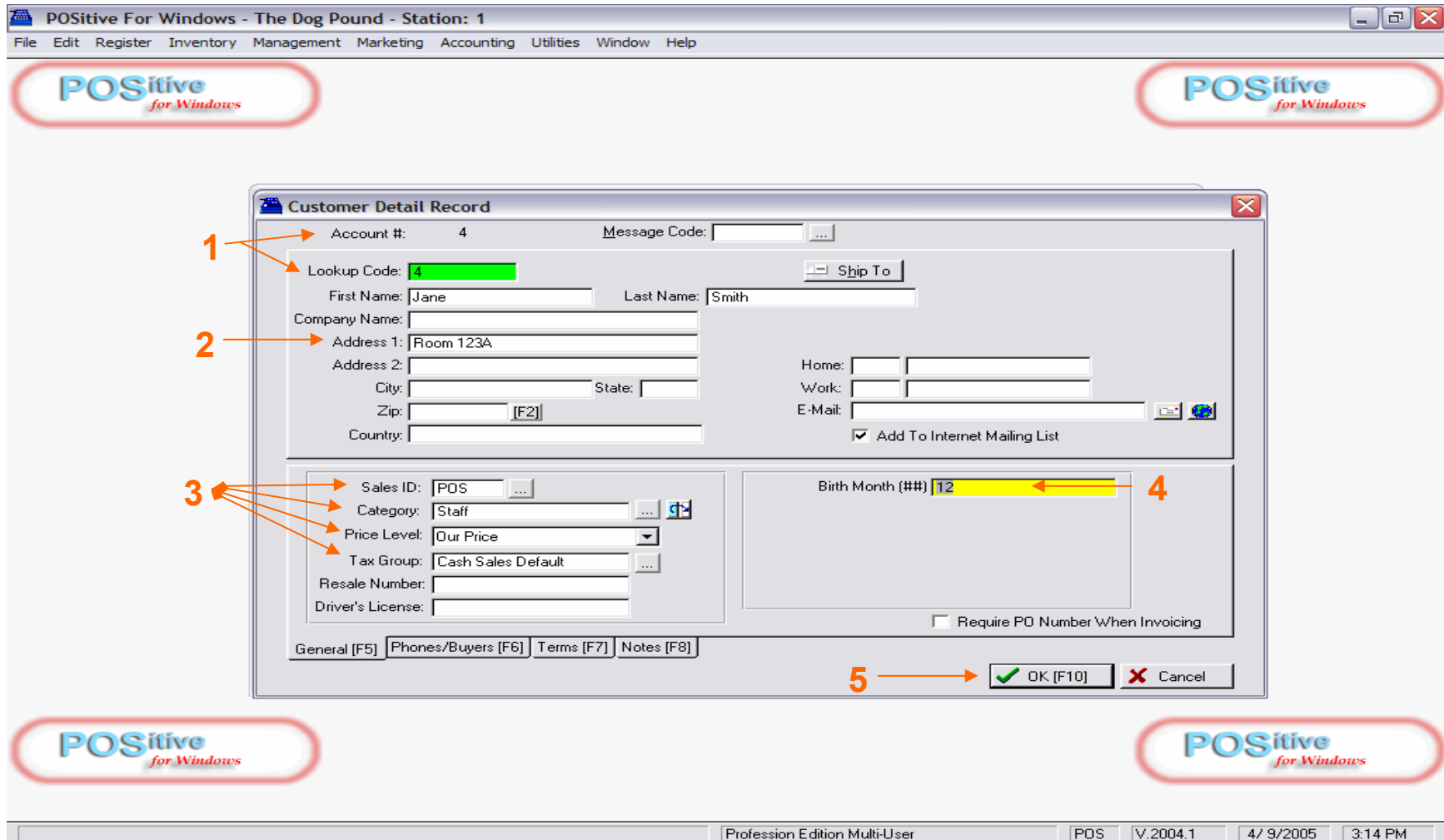
## To add or edit a Customer

- For this lesson we will discuss **Adding a New Customer**
  - Click **ADD Button** and go to next page for instructions
- To Edit an existing Customer, Highlight the Customer and click the **EDIT button**



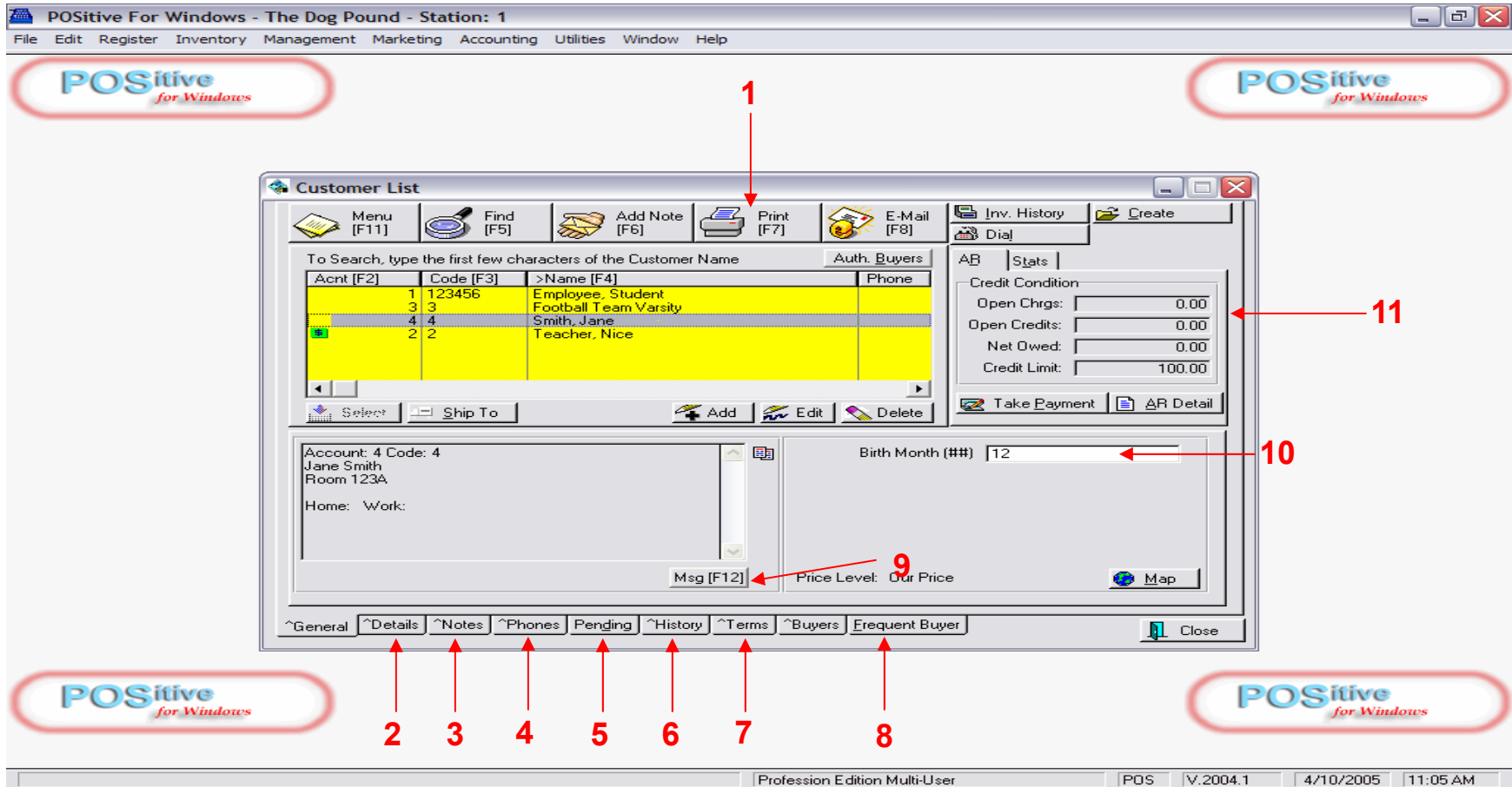
## When you add a Customer, you will be prompted to select a Customer Category:

1. For this lesson we will be adding a Teacher as a Customer, so highlight Staff Category
  - **Click Select Button and go to next page for further instructions**
2. To Edit the properties of a Customer Category, click the **EDIT button** (bottom right corner)
  - For Positive-PRO users, 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); Birth Month Coupons = user-defined field 1



### When you add a Customer, you should fill the following fields:

1. POS will auto-add an Account & Lookup # . Option: Enter Staff ID# (scan barcode) for fast customer lookup in Sales.
2. Add a Room number only if you are a **POSITIVE PRO-User** and plan on offering house-charge (AR) privileges.
3. These fields are automatically (default) selected for you. Do nothing here.
4. Birth Month Number: Enter the Month the teacher was born (i.e. Jan = 01, Dec = 12)
  - Ignore this field if you do not wish to use Birthday Coupons with staff (advance marketing)
5. Click OK (F10) to save Customer File settings.



1. Print a customer list, mailing labels, or a (query) Birth Month report.
  2. Quick View & Edit of address and phone fields. 4) Add more phone numbers
  3. Quick View & Add Notes (with time/date stamp)
  5. Quick View & Edit of Orders or Layaways pending for customer.
  6. Quick View of Customer's Invoice History.
  7. Quick View & Edit of House Account Terms & Credit Limit
  8. Quick View & Edit of Frequent Buyer Program points History
  9. Ability to send a message prompt to Cashier when Customer is selected in Sales Screen.
  10. Quick View of House Account (AR) current status.
- \* Note: There are more features available here, but are seldom used in a School Store environment.