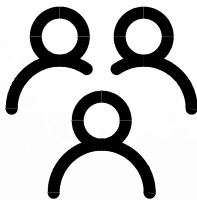


How To: Manage Customers



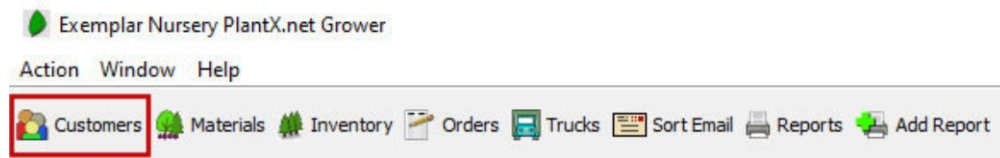
By C-Ware, Inc.

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How to Create a New Customer

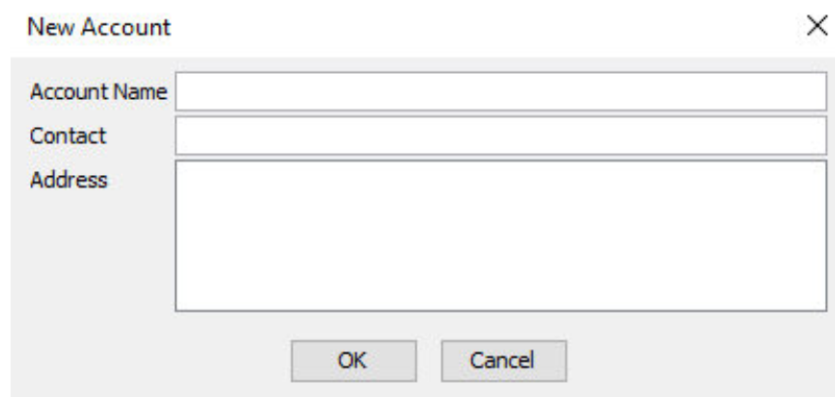
- 1) Select the Customers tab from the top menu.



- 2) Push the green plus button to add a new customer.

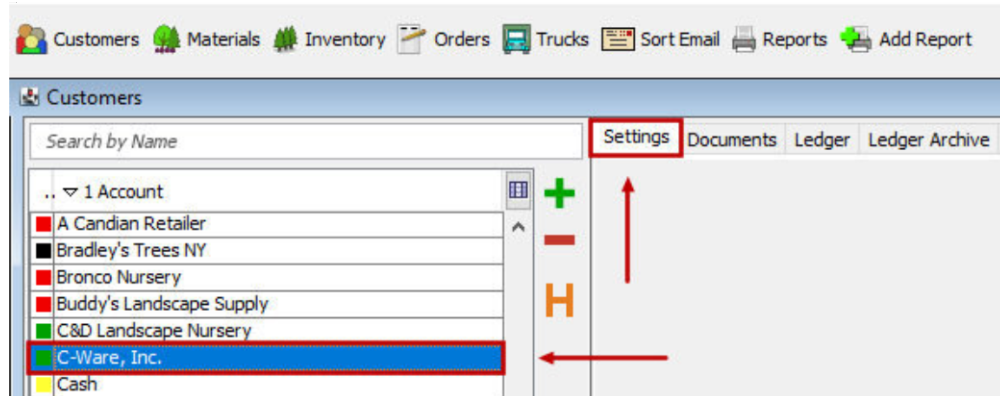


- 3) On the pop-up input the account name (this is the only required field), Contact, and Address. The account name is the customer's name (e.g. Exemplar Nursery), the contact would be the person you contact most, and the address is their main address. Push OK when done.



How to Manage Settings

- 1) Select a customer from the list to the left side of the screen. Then the Settings tab.



- 2) Fill in all applicable fields.
 - I) Name: The name should be automatically filled in.
 - II) Number: The number is automatically generated but can be customized/changed.
 - III) Parent: This is where you can input a parent company.
 - IV) List as Parent: Check this box to list this company as a parent company.
 - V) Sales Rep: If this customer has a sale rep attached input that here.
 - VI) Account Manager: This field is for internal use, if you have an employee/rep that manages accounts you can put that here.
 - VII) Start Date: When the customer started with you.
 - VIII) Customer Type: If you categorize customers by type that can be entered here (e.g. retailer, garden center, landscaper, etc.,).
 - IX) Terms: Default Payment Terms
 - X) Default Discount: This is the discount this customer will get on all orders.
 - XI) Credit Limit: This is the dollar amount they have credit on.
 - XII) UPS Acct Number: Customer's UPS shipping account number
 - XIII) Carry A/R Balance:
 - XIV) Require PO Number: Check this is your order required a PO number.
 - XV) Use Container Deposit: Use this if you require a container deposit from this customer.

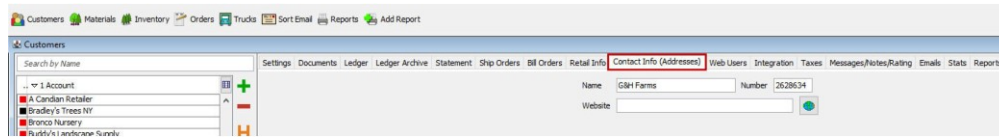
- XVI) Use Billing Account for Retail Pricing: Often used in parent-child relationships.
- XVII) Use UPC Codes: If this is checked it will automatically populate UPCs on order items.
- XVIII) Use SKU: If this is checked it will automatically populate SKUs on order items.
- XIX) Use Retail: This automatically populates retail information on order items.
- XX) Hidden: If this is checked it will hide the account.
- XXI) Preferred Shipping Method: This will automatically populate the shipping method on the order.
- XXII) Default Per Tag Rate: Keeps track of the dollar amount charged per tag.
- XXIII) Retail Markup: Automatically generates a retail price on orders using the input markup.
- XXIV) Currency: This is defaulted to USD.
- XXV) Pricing: This selects the default price list for this customer.

The screenshot shows a customer profile form with the following fields and options:

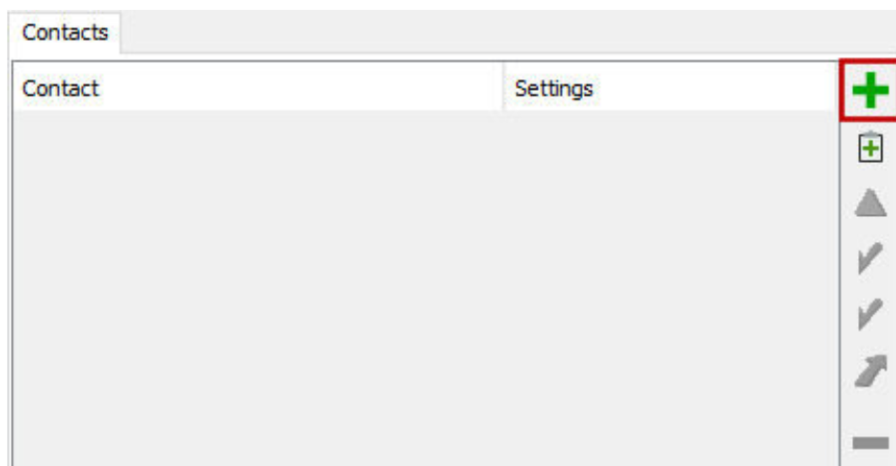
- I** Name: C-Ware, Inc.
- II** Number: 2552785
- III** Parent: <None>
- IV** List as Parent
- V** Sales Rep: Western Tree Sales
- VI** Account Manager: [Empty]
- VII** Start Date: 09/03/16
- VIII** Customer Type: [Empty]
- IX** Terms: Net due upon receipt
- X** Default Discount: 0% (i.e. 10 = 10%)
- XI** Credit Limit: 0.00
- XII** UPS Acct Number: [Empty]
- XIII** Carry A/R Balance
- XVII** Use UPC Codes
- XIV** Require PO Number
- XVIII** Use SKU
- XV** Use Container Deposit
- XIX** Use Retail
- XVI** Use Billing Account for Retail Pricing
- XX** Hidden
- XXI** Preferred Shipping Method: [Empty]
- XXII** Default Per Tag Rate: 0.00
- XXIII** Retail Markup: 0
- XXIV** Currency: USD
- XXV** Pricing: Wholesale

How to Input Contact Information

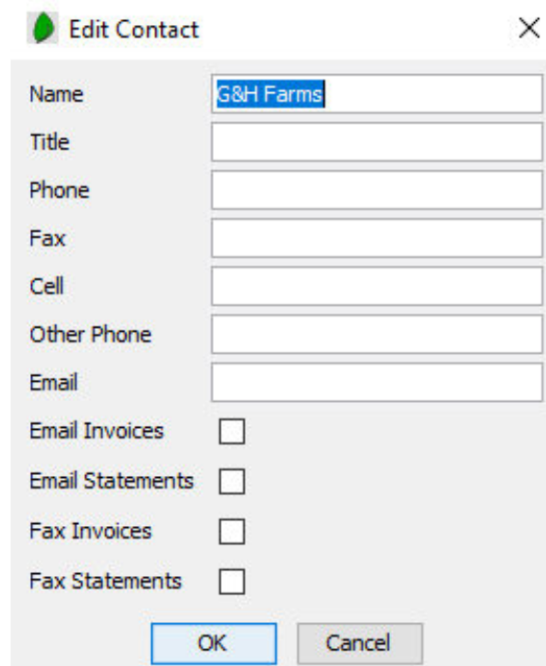
- 1) Select a customer from the list to the left side of the screen. Then the Contact Info (Addresses) tab.



- 2) Push the green plus button on the left to add a new contact.



- 3) Input customer information on the pop up and enter OK when done.



Edit Contact [X]

Name: G&H Farms

Title: []

Phone: []

Fax: []

Cell: []

Other Phone: []

Email: []

Email Invoices:

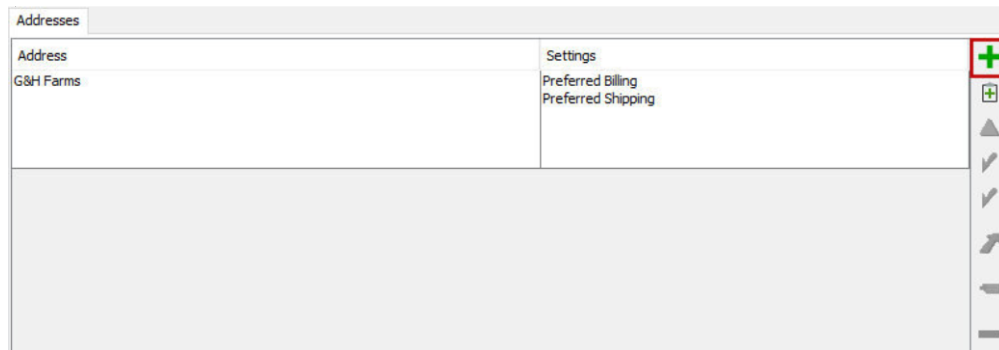
Email Statements:

Fax Invoices:

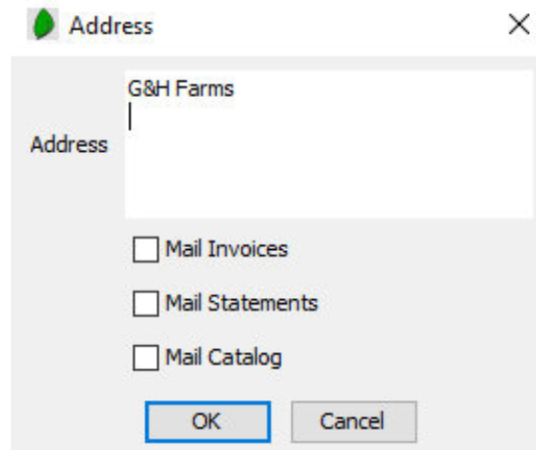
Fax Statements:

OK Cancel

- 4) Push the green plus on the right to add a new address.

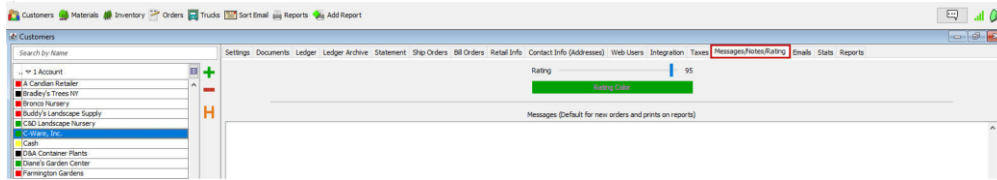


- 5) Enter information on the pop-up and push OK when done.



How to Use Messages/Notes/Ratings

- 1) Select the Messages/Notes/Ratings tab from the Customers window.



- 2) Here you can rate your customers on a scale of 0-100. Ratings can be based on any criteria, for example on-time payments, order volume, etc. Use the slider to rate your customer.
- 3) Here you can also add Messages that will appear on orders and reports.
- 4) Notes are also available for internal use; your customers will not see these.