



QuickStart Guide

Selecting Customers to Invoice

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ARKONA QuickStart Guide

Use this QuickStart Guide for some tips on searching for and selecting customer to parts invoices.

- The following **shortcuts** can be performed on the function line in Parts Transactions:
 1. To select a customer by account number, type 2 (space) customer #.
 2. To search for a customer by name, type 2 (space) customer name to automatically position to that name in the customer database.
 3. To search for a customer by phone number, type 3 (space) phone #.

- **To add a new customer to an invoice**, take the following steps:
 1. Check the phone number.
 - a. Type 3 (space) phone number to search by phone number.
 2. Search for the name.
 - a. Take option **2=Customer** to display the search window.
 - b. Key in the first few characters of the customer name and press [ENTER] to search.
 - i. Searching by phone and name before adding a customer preserves the integrity of the database by helping avoid duplicate names and consolidating transaction history on the correct customer record.
 3. Add the name to the database.
 - a. Use function **F6=Add** to display the Customer Information screen.
 - b. Key in the phone number.
 - c. Use function **F5=Company** if the customer is not an individual.
 - d. Key in the remaining customer information.
 4. Set the customer price level.
 - i. Skip this step if you want to use the retail pricing matrix.
 - ii. You can also set the Service Price Level, Wholesale Comp information, Special Order Deposit percent, Service Labor Rate, and Customer Type (retail or wholesale) from this window.
 - b. Use function **F7=Pricing** to display additional customer profile information.

- c. Hit F4 on the Counter* line and take option **1=Select** to set the retail price level.
- d. Press [ENTER] to save.

- **To add an existing customer to an invoice**, take the following steps:
 1. Type 2 (space) customer# if you know the Accounts Receivable customer number.
 2. Check the phone number.
 3. Search by name.
 - a. Type 2 (space) customer name to position to that name in the database.
 - i. This step lets you see if the customer exists in the database under a different phone number than the one entered. This way all of the customer's history will be tied to the same name record.
 - ii. **You can narrow the search** by entering LAST NAME, FIRST NAME or first initial.
 - iii. **If you are unsure of the spelling**, or think the name may have been previously entered with an incorrect spelling, enter fewer letters of the last name to widen the scope of the search.
 - iv. You may have to page down through several screens of customers with the same last name.
 - v. Customers with accounts receivable numbers display in white with the customer number in the Cus# column.
 - b. Take option **1=Select** by the customer to pull them into the parts invoice.
- **To change customers on an invoice** after one has been selected, take the following steps:
 1. Take option **2=Customer** to display the Customer Address window.
 2. Hit F4 to see a list of functions; or take option **1=Select New Customer** to display the search window.
 3. Search for and select a different customer as described above.

- **To make changes to customer information** on an invoice, take the following steps:
 1. Select the customer to the invoice as described above.
 2. Take option **2=Customer** to display the Customer Address window.
 3. Hit F4 to see a list of functions; or take option **2=Update** on the Function* line to display the Customer Information screen.
 4. Make changes to the information and press [ENTER] twice to save.

- **To change the price level associated with a customer** on an invoice, take the following steps:
 1. Select the customer to the invoice as described above.
 2. Take option **2=Change** to display the Customer Address window.
 3. Hit F4 to see a list of functions; or take option **3=Pricing** to display the Price Level window.
 4. Hit F4 on the Counter* to display the Price Level Selection screen and take option **1=Select** by the price level.

- **To add a shipping address to an invoice**, take the following steps:
 1. Select the customer to the invoice as described above.
 2. Take option **2=Change** to display the Customer Address window.
 3. Hit F4 to see a list of functions; or take option **4=Shipping Address** to display the search window.
 - a. Search for the 'ship to' company name and address the same way you search for the customer.
 - b. Take option **1=Select** by the shipping address; or use function **F6=Add** to add a new name and address