

Adding Retail Customers

Dancik Navigator

MENU

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 - Salesperson
- Invoicing
- Order Management
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Remove From Favorites

Select File Management Menu
Select Retail Customer

Page Selection

A set of navigation controls for page selection, including a left arrow, a series of document icons, and a right arrow.

Retail Customer

Filters View Records

Last Name

First Name

Address 1

Address 2

2. Click Records and then Create to add records to the file.

1. Close Retail Customer filter box

Retail Customer Filters

<input type="checkbox"/>	Field		Filter	
<input checked="" type="checkbox"/>	Last Name	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	First Name	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Address 1	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Address 2	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	City	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	State	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Zip Code 1	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Zip Code 2	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Country	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Area Code	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Phone#	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>
<input checked="" type="checkbox"/>	Fax#	<input type="text"/>	<input type="text"/>	<input type="button" value="⊖"/>

Save View

Default View

Public Filters (0)

Private Filters (0)

Apply

Retail Customer

Filters View Records

Last Name

First Name

State

Zip Code 1

Zip Code 2

Country

Area Code

Phone

Create Record

Company:					
* Last Name:	SUZIE				
* First Name:	SMITH				
* Address 1:	1245 TWIN OAKS				
Address 2:					
City:	** CASH ONLY **				
State/Zip:	-				
Country:					
* Main Phone#:	(714) 851-4567				
Fax#:					
Other Phone#:					
Email Address:					
Customer Type:					
Taxable:	Y				
Tax ID:					
Club:					
Expiration Date:					
Branch:					
Primary card or check#:		Type:		Expires:	
Secondary card or check#:		Type:		Expires:	
Other payment method:		Payment method:			

Enter customers Name, address if provided, phone #
*Required. Select create to confirm entries.

Create



Retail Customer

Filters View Records

Last Name

First Name

Address 1

Address 2

Available Options

- Display
- Update
- Delete

MOLINA

1407 N BATAVIA SUITE 109

ORANG

Search existing customers and/or update customer record.

Delete: For Accounting Department only.



Retail Customer

Filters
 View
 Records

	Last Name	First Name	Address 1	Address 2	
▶	BUITRON	ANDREW	10450 PRATHER LN		
▶	DURBER	KAREN	16285 ROCKY GLEN RD		PERRIS
▶	ELECTRICAL INC.				
▶	FRANCISCO				ORANG
▶	FRIAS				HEMET
▶	GIOVANNY				RANCH
▶	GOSWITZ				
▶	GREEN				VILLA F
▶	HALL				OCEAN
▶	JOHN				
▶	LUCAS				
▶	MASTER				LAKE F
▶	MCBRIDE				ALPINE
▶	MCCOLLOM				
▶	MCGUIRE				SAN CL
▶	MCKOY				
▶	PEDROZA				GRANA
▶	PHILLIPS				TEMEC
▶	POOLS AND SPAS				INDIO
▶	RIZVI	SYED ANWAR S	6107 EL PRADO AVE		EASTVA
▶	SIEGER	GARRETT	4950 E HUNTER AVE		ANAHE
▶	SUZIE	SMITH	1245 TWIN OAKS		** CASI
▶	VALENZULEA	ART	8504 CEYLON AVENUE		

Retail Customer Filters

<input type="checkbox"/>	Field		Filter	
<input checked="" type="checkbox"/>	Last Name	CT	FRANCISCO	
<input checked="" type="checkbox"/>	First Name			
<input checked="" type="checkbox"/>	Address 1			
<input checked="" type="checkbox"/>	Address 2			
<input checked="" type="checkbox"/>	City			
<input checked="" type="checkbox"/>	State			
<input checked="" type="checkbox"/>	Zip Code 1			
<input checked="" type="checkbox"/>	Zip Code 2			
<input checked="" type="checkbox"/>	Country			
<input checked="" type="checkbox"/>	Area Code			
<input checked="" type="checkbox"/>	Phone#			
<input checked="" type="checkbox"/>	Fax#			

Save View

Default View

Public Filters (0)

Private Filters (0)

Apply



Retail Customer

Filters View Records

Last Name

▶	BARKER
▶	BRICK
▶	BUITRON
▶	DURBER
▶	ELECTRICAL INC.
▶	FRANCISCO
▶	FRIAS
▶	GIOVANNY
▶	GOSWITZ
▶	GREEN
▶	HALL
▶	JOHN
▶	LUCAS
▶	MASTER
▶	MCBRIDE
▶	MCCOLLOM
▶	MCGUIRE
▶	MCKOY
▶	PEDROZA
▶	PHILLIPS
▶	POOLS AND SPAS
▶	RIZVI
▶	SIEGER

Display Record

Customer ID: 14

Customer ID: 14

Company: 0

Last Name: FRANCISCO

First Name: MOLINA

Address 1: 1407 N BATAVIA SUITE 109

Address 2:

City: ORANGE

State/Zip: CA 92867 -

Country:

Main Phone#: (877) 832-5366

Fax#:

Other Phone#:

Email Address:

Customer Type: GC

Taxable: Y

Tax ID:

Club:

Expiration Date:

Branch:

Primary card or check#:

Secondary card or check#:

Other payment method:

Type: **Expires:**

Type: **Expires:**

Payment method:

▶ **Options**

- Order History
- Notepad

Use these Options to check on the order history and review notepad.

Return

Display Record

Customer ID: 14

Options

Customer ID: 14

Company: 0

Last Name: FRANCISCO

Order History ✓

Name: MOLINA FRANCISCO

Address 1: 1407 N BATAVIA SUITE 109

Address 2:

City/State/Zip: ORANGE CA 92867

Main Phone#: (877) 832-5366

Email:

Total Open Orders: \$0.00

Balance Due: \$0.00

Credits: \$0.00

Number of Orders: 2

Sales Past 12 Months: \$12,499.04

Sales Previous 12 Months: \$0.00

Reference	Order#	Status	Date	Branch	Warehouse	Sales Person	Total Open	Balance Due
1169156	288947	CLOSED	08/29/22	ANA	ANA	ANA	0.00	0.00
1175715	294318 ✓	CLOSED	09/28/22	ANA	ANA	ANA	0.00	0.00

Order History:

The Retail Customer Order History screen displays all orders placed for this customer, including the order status. Payment information is gathered automatically from the AR history files and the daily payment screens.

Can also select order# to view order/invoice details

Return

Account#: 000099 CONTRACTOR CASH SALES - ANA MOLINA FRANCISCO 1407 N BATAVIA SUITE 109 ORANGE, CA 92867 (877) 832-5366	Ship To: MOLINA FRANCISCO 1407 N BATAVIA SUITE 109 ORANGE, CA 92867 (877) 832-5366	Order Date: 09/28/22 PO#: 877-832-5366 Job Name: Ship Date: 09/28/22 Ship Via: WC Initials: RW	Entry Date: 09/28/22 Salesperson 1: ANA Salesperson 2: Branch: ANA Warehouse: ANA Supplier: 001
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CASH

Line	Item#	Quantity	Unit Price	Extended Price	Ware	Status	Serial#	Location	Shade	Weight
10	AS1TRVTIVOFRNC3C PAVER - IVORY FRENCH/VE 3CM PREMIUM TRAVERTINE, TUMBLED	40.00 SF	\$8.000	\$320.00	ANA	# - CLOSED (INVOICED) 283114	AQB	B192		
11	-----		\$.00			INVOICED 283114 ✓				
12	STAGED AT (X-06-01) BY ROB.		\$.00			INVOICED 283114				

Messages
 SEE NOTEPAD FOR BAD CHECKS
 THIS ORDER WAS PRINTED 1 TIME(S) AS A PICK LIST.

Item Total:	\$	0.00
Terms Discount:	\$	0.00
Freight:	\$	0.00
Taxes:	\$	0.00
Order Total	\$	0.00

GP\$:	0.00	GP%:	0.00
Total Weight:	0 LB		
Payments:	\$		0.00
Balance Due:	\$		0.00

Retail Customer

Filters View Records

Last Name

Update Record

Customer ID: 14

Options

* Customer ID: 14

Company: 0

* Last Name: FRANCISCO

Notepad

+ Show Details

Line	Text
10	Customer building pool, prefers blue color scheme.
20	
30	
40	
50	
60	
70	
80	
90	
100	
110	

Save

Notepad: Use this option to record information about the customer.

Update

Update and Next Record