

# **Retail Customer File**

*Instructions for Service Counter Team*

## **Retail Customer File**

This retail customer file is a feature that can be used for your generic “Cash Accounts” such as acct 00099 Anaheim Cash Account. There is likely at least one of these types accounts for each branch.

Provided this system feature is activated and upon selecting one of these “Cash” accounts the operator will be prompted to search for the customer in the retail database, OR you can add the customer information.

### **Benefits:**

- 1) You can track sales of these retail walk in customers to measure sales. This could potentially lead to providing the customer with an account and assign a specific price list.
- 2) If a customer returns and requests for additional product, it makes searching for the product easier if the customer doesn't have their order information.
- 3) Returns are made easier when you can do a credit on the original order.

Reference#:   Order#:    Include Rollovers?

Order Search by: Processed Unprocessed

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
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View Results by:  Header  Detail

Types:  Customer  PO  Stock-to-Stock

Line Types:  Open Item  Closed Item

Open Msg w/ \$  Open Msg w/o \$  Closed Message

Filter Fields by:

Suppressed Spcl PO?

Company: 0

Account#:

Branch:

Warehouse:

Salesperson 1:

Job Name:

Order Date: 10/01/22  to

Ship Date:  to

Customer PO:

Item#:

Product Line:

Item Class 1:

Message(s):

Retail Customer:

Supplier:

Ship Via:

Order Type:

Initials:

CQM Account:

CQM Opportunity:

COM Job Quote#:

**Keyword Search for customer by name or acct number**

### Order Entry

Select a customer or an account.

Keyword Search :   Exact match  String search

ID	Description	Doing Business As	City	ST	Zip	Phone (B)
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New Order Reference#: [ ] Submit Order#: [ ] Submit  Include Rollovers? Available Options

Order Search by: Processed Unprocessed

View Results by:  Header  Detail

Types:  Customer  PO  Stock-to-Stock

Line Types:  Open Item  Closed Item

Open Msg w/ \$  Open Msg w/o \$  Closed Message

Filter Fields by:

Suppressed Spcl PO?

Company: 0

Account#: [ ]

Branch: [ ]

Warehouse: [ ]

Salesperson 1: [ ]

Job Name: [ ]

Order Date: 10/01/22 to [ ]

Ship Date: [ ] to [ ]

Customer PO: [ ]

Item#: [ ] [ ] [ ]

Product Line: [ ]

Item Class 1: [ ]

Message(s): [ ]

Retail Customer: [ ]

Supplier: [ ]

Ship Via: [ ]

Order Type: [ ]

Initials: [ ]

CQM Account: [ ]

CQM Opportunity: [ ]

COM Job Quote#: [ ]

Search Clear All Download

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
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**Order Entry**

Select a customer or an account.

Keyword Search : 0009  Exact match  String search

ID	Description	Doing Business As	City	ST	Zip	Phone (B)
New Customer						

Enter cash customer number

Reference#:   Order#:    Include Rollovers?

Order Search by: Processed Unprocessed

View Results by:  Header  Detail  
Types:  Customer  PO  Stock-to-Stock  
Line Types:  Open Item  Closed Item  
 Open Msg w/ \$  Open Msg w/o \$  Closed Message

Filter Fields by:

Suppressed Spcl PO?

Company: 0

Account#:

Branch:

Warehouse:

Salesperson 1:

Job Name:

Order Date: 10/01/22 to

Ship Date:  to

Customer PO:

Item#:

Product Line:

Item Class 1:

Message(s):

Retail Customer:

Supplier:

Ship Via:

Order Type:

Initials:

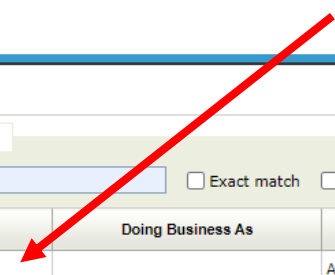
CQM Account:

CQM Opportunity:

COM Job Quote#:

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name														
<div style="border: 2px solid blue; padding: 10px;"><h3>Order Entry</h3><p>Select a customer or an account.</p><p>Keyword Search : 00099 <input type="checkbox"/> Exact match <input type="checkbox"/> String search</p><table border="1"><thead><tr><th>ID</th><th>Description</th><th>Doing Business As</th><th>City</th><th>ST</th><th>Zip</th><th>Phone (B)</th></tr></thead><tbody><tr><td>000099</td><td>CONTRACTOR CASH SALES - ANA</td><td></td><td>ANAHEIM</td><td>CA</td><td>92807</td><td></td></tr></tbody></table><p><input type="button" value="New Customer"/> 1 of 1</p></div>												ID	Description	Doing Business As	City	ST	Zip	Phone (B)	000099	CONTRACTOR CASH SALES - ANA		ANAHEIM	CA	92807	
ID	Description	Doing Business As	City	ST	Zip	Phone (B)																			
000099	CONTRACTOR CASH SALES - ANA		ANAHEIM	CA	92807																				

**Double click acct**



Reference#:   Order#:    Include Rollovers?

Order Search by: Processed Unprocessed

View Results by:  Header  Detail  
Types:  Customer  PO  Stock-to-Stock  
Line Types:  Open Item  Closed Item  
 Open Msg w/ \$  Open Msg w/o \$  Closed Message

Filter Fields by:

Suppressed Spcl PO?

Company: 0

Account#:

Branch:

Warehouse:

Salesperson 1:

Job Name:

Order Date: 10/01/22 to

Ship Date:  to

Customer PO:

Item#:

Product Line:

Item Class 1:

Message(s):

Retail Customer:

Supplier:

Ship Via:

Order Type:

Initials:

CQM Account:

CQM Opportunity:

COM Job Quote#:

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
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This screen allows to search for the customer by name

### Order Entry

**Billing Account** | [change](#)  
000099 - CONTRACTOR CASH SALES - ANA  
ANAHEIM, CA 92807

**Retail Account**  
You have selected a Billing Account, to place this order with, but now you need to select a Retail Customer. Please select from the listing below.

Keyword Search :   Exact match  String search

Name	City	ST	Zip	Phone
<input type="button" value="New Customer"/>				

New Order Reference#: [ ] Submit Order#: [ ] Submit Include Rollovers? [ ]

Available Options

Order Search by: Processed Unprocessed

View Results by: Header Detail

Types: Customer PO Stock-to-Stock

Line Types: Open Item Closed Item

Open Msg w/ \$ Open Msg w/o \$ Closed Message

Filter Fields by:

Suppressed Spcl PO? Company: 0 Account#: Branch: Warehouse: Salesperson 1: Job Name: Order Date: 10/01/22 Ship Date: Customer PO: Item#: Product Line: Item Class 1: Message(s): Retail Customer: Supplier: Ship Via: Order Type: Initials: CQM Account: CQM Opportunity: COM Job Quote#: Search Clear All Download

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
------------	--------	------------	------	----------	-----------	--------------	--------	-----------	---------------	-------------	-------------

Search by first or last name, phone number, etc.,

**Order Entry**

**Billing Account** | [change](#)  
000099 - CONTRACTOR CASH SALES - ANA  
ANAHEIM, CA 92807

**Retail Account**  
You have selected a Billing Account, to place this order with, but now you need to select a Retail Customer. Please select from the listing below.  
[Bypass](#)

Keyword Search :   Exact match  String search

Name	City	ST	Zip	Phone
MICHAEL HALL	OCEAN ISLE BEACH	NC	28469	(919) 673-2611

[New Customer](#) 1 of 1

Collapse Filters

25 records

Reference#:   Order#:    Include Rollovers?

Order Search by: Processed Unprocessed

View Results by:  Header  Detail  
Types:  Customer  PO  Stock-to-Stock  
Line Types:  Open Item  Closed Item  
 Open Msg w/ \$  Open Msg w/o \$  Closed Message

Filter Fields by:  
Suppressed Spcl PO?   
Company: 0  
Account#:   
Branch:   
Warehouse:   
Salesperson 1:   
Job Name:   
Order Date: 10/01/22 to   
Ship Date:  to   
Customer PO:   
Item#:   
Product Line:   
Item Class 1:   
Message(s):   
Retail Customer:   
Supplier:   
Ship Via:   
Order Type:   
Initials:   
CQM Account:   
CQM Opportunity:   
COM Job Quote#:

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
------------	--------	------------	------	----------	-----------	--------------	--------	-----------	---------------	-------------	-------------

### Order Entry

**Billing Account** | [change](#)  
000099 - CONTRACTOR CASH SALES - ANA  
ANAHEIM, CA 92807

**Retail Account**  
You have selected a Billing Account, to place this order with, but now you need to select a Retail Customer. Please select from the listing below.

Keyword Search :   Exact match  String search

Name	City	ST	Zip	Phone
<input checked="" type="checkbox"/> MICHAEL HALL	OCEAN ISLE BEACH	NC	28469	(919) 673-2611

1 of 1

**If customer not found, click the option for New Customer**



Retail Customer

Filters View Records

Last Name First Name

### Create Record

Company:					
* Last Name:	HALL				
* First Name:	MICHAEL				
* Address 1:	1882 E LONG ACRES DR				
Address 2:					
City:	OCEAN ISLE BEACH				
State/Zip:	NC 28469 -				
Country:					
* Main Phone#:	9196732611				
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

Create

25 records Refresh

New Order Reference#: [ ] Submit Order#: [ ] Submit Include Rollovers? Available Options

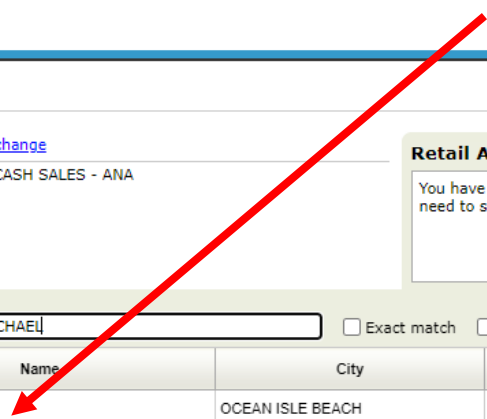
Order Search by: Processed Unprocessed

View Results by: Header Detail
Types: Customer PO Stock-to-Stock
Line Types: Open Item Closed Item
Filter Fields by: Suppressed Spcl PO? Company: 0 Account#: Branch: Warehouse: Salesperson 1: Job Name: Order Date: 10/01/22 Ship Date: Customer PO: Item#: Product Line: Item Class 1: Message(s): Retail Customer: Supplier: Ship Via: Order Type: Initials: CQM Account: CQM Opportunity: COM Job Quote#: Search Clear All Download

Table header: Order Date, Order#, Reference#, Name, Account#, Ship Date, Customer PO#, Branch, Warehouse, Salesperson 1, Order Total, Retail Name

Order Entry window containing Billing Account, Retail Account, Keyword Search (MICHAEL), and a table with one row: MICHAEL HALL, OCEAN ISLE BEACH, NC, 28469, (919) 673-2611

If customer found, double click the customer



Customer Order Reference#: 1182880

Available Options

Account#: 000099  
CONTRACTOR CASH SALES - ANA  
MICHAEL HALL  
1882 E LONG ACRES DR. SW  
OCEAN ISLE BEACH, NC 28469  
(919) 673-2611

Ship To:  
MICHAEL HALL  
1882 E LONG ACRES DR. SW  
OCEAN ISLE BEACH, NC 28469  
(919) 673-2611

Order Date: 10/31/22  
PO#: 919-673-2611  
Job Name:  
Ship Date: 10/31/22  
Ship Via: WC  
Initials: MH

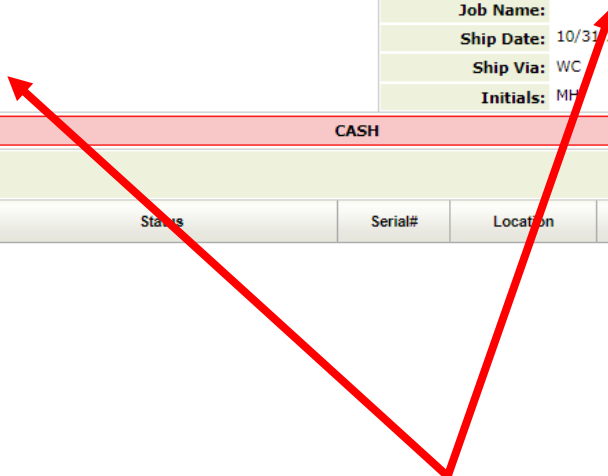
Entry Date: 10/31/22  
Salesperson 1: ANA  
Salesperson 2:  
Branch: ANA  
Warehouse: ANA  
Supplier: 001

CASH

Add Line: Item#:  Quantity:  UM:  Add

CQM Job Quote Multi Line Entry

Line	Item#	Quantity	Unit Price	Extended Price	Ware	Status	Serial#	Location	Shade	Weight	Quantity Received	Quantity in Pre-receipts	Receipt associated	Quantity Shipped	Quantity Open	Restriction Code
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System returns operator to standard order entry screen.

Note though that customers name and address will be populated into the shipto field and their phone number will populate the PO# field.

Messages

SEE NOTEPAD FOR BAD CHECKS

Item Total:	\$	0.00
Terms Discount:	\$	0.00
Freight:	\$	0.00
Taxes:	\$	0.00
<b>Order Total</b>	<b>\$</b>	<b>0.00</b>

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

Save as Unprocessed Print Preview Process Order Cancel Order

Customers name and address will be populated into the shipto field and their phone number will populate the PO# field.



QUOTATION  
10/31/22 6:16 PAGE 1

REFERENCE#  
1182880

BILL TO:	SHIP TO:	REMIT TO:
HALL, MICHAEL 1882 E LONG ACRES DR. SW OCEAN ISLE BEACH NC 28469	MICHAEL HALL 1882 E LONG ACRES DR. SW OCEAN ISLE BEACH NC 28469	AQUABELLA USA, LLC 11906 BRITTMORE PARK DR HOUSTON TX 77041-7344

ORDER DT	DATE REQ	SHIP VIA	F.O.B	ACCOUNT#	CUST PO#	JOB	TERMS	ORDER REFERENCES	BRANCH
10/31/22	10/31/22	WILL CALL	WAREHOUSE	000099	919-673-2611		NET CASH	001/1182880/MH/B2/	ANA/ANA

LINE	ITEM#	DESCRIPTION	SHIP DATE	QTY ORD	U/M	UNIT PRICE	PRICE	STATUS
0010	ALAT252400252	Salesperson: HOUSE ACCOUNT - ANA THIS IS A TEST ORDER - DO NOT SHIP LAT- NATURAL GREY GROUT 25# PERMACOLOR 2524-0025-2 Serial# AQB	10/31/22	1.00	BG	28.000	28.00	In-Stock

Reference#:   Order#:    Include Rollovers?

Order Search by: Processed Unprocessed

View Results by:  Header  Detail  
Types:  Customer  PO  Stock-to-Stock  
Line Types:  Open Item  Closed Item  
 Open Msg w/ \$  Open Msg w/o \$  Closed Message

Filter Fields by:

Suppressed Spcl PO?

Company:

Account#:

Branch:

Warehouse:

Salesperson 1:

Job Name:

Order Date:  to

Ship Date:  to

Customer PO:

Item#:

Product Line:

Item Class 1:

Message(s):

Retail Customer:

Supplier:

Ship Via:

Order Type:

Initials:

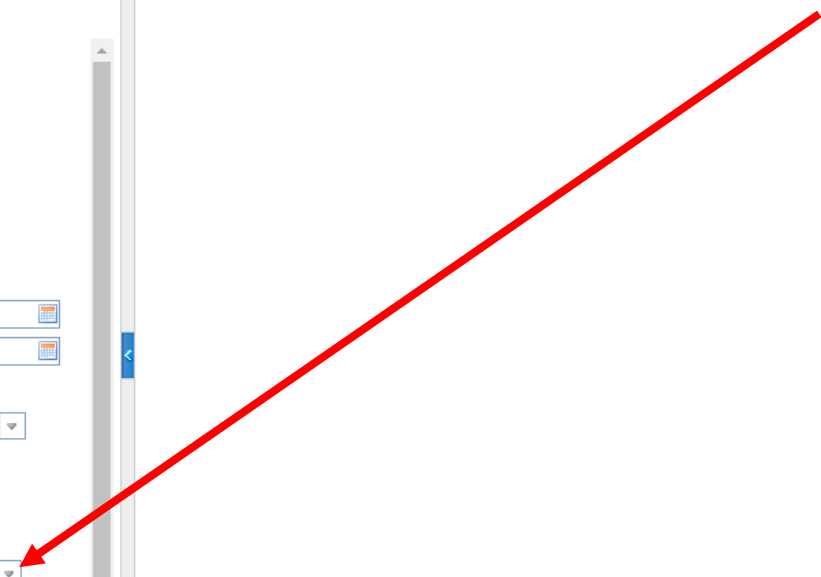
CQM Account:

CQM Opportunity:

COM Job Quote#:

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
(Table content is empty)											

**Order Search for retail customers**



New Order

Reference#:  Submit Order#:

Available Options

Order Search by: **Processed** **Unprocessed**

View Results by:  Header  Detail  
Types:  Customer  PO  Stock-to-Stock  
Line Types:  Open Item  Closed Item  
 Open Msg w/ \$  Open Msg w/o \$  Closed Message

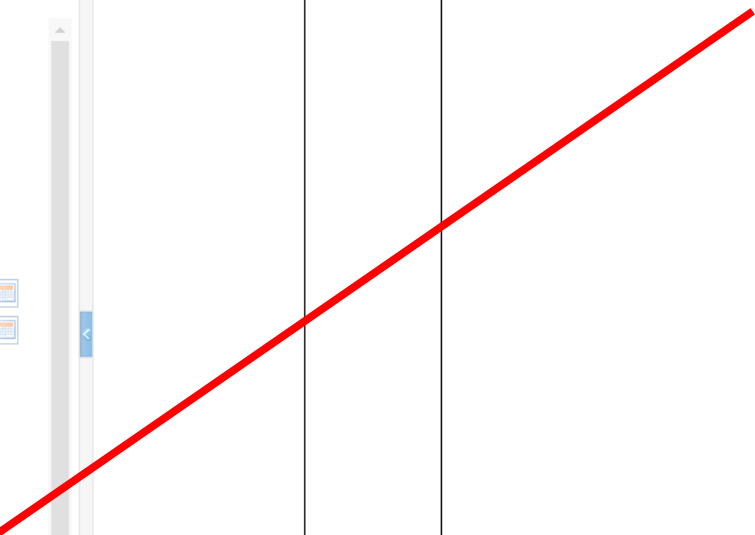
Filter Fields by:  
Suppressed Spcl PO?   
Company: 0  
Account#:   
Branch:   
Warehouse:   
Salesperson 1:   
Job Name:   
Order Date: 10/01/22 to   
Ship Date:  to   
Customer PO:   
Item#:   
Product Line:   
Item Class 1:   
Message(s):   
**Retail Customer:**   
Supplier:   
Ship Via:   
Order Type:   
Initials:   
CQM Account:   
CQM Opportunity:   
COM Job Quote#:

Retail Customer

Keyword Search: 919  B/W

Order Date	Index	Name	City	ST	Phone (B)	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
	M 1	MICHAEL HALL	OCEAN ISLE BEACH	NC	(919) 673-2611					

Option to serach by phone number



Search Clear All Download

Collapse Filters

1 of 1

25 records

25 records

Reference#:   Order#:    Include Rollovers?

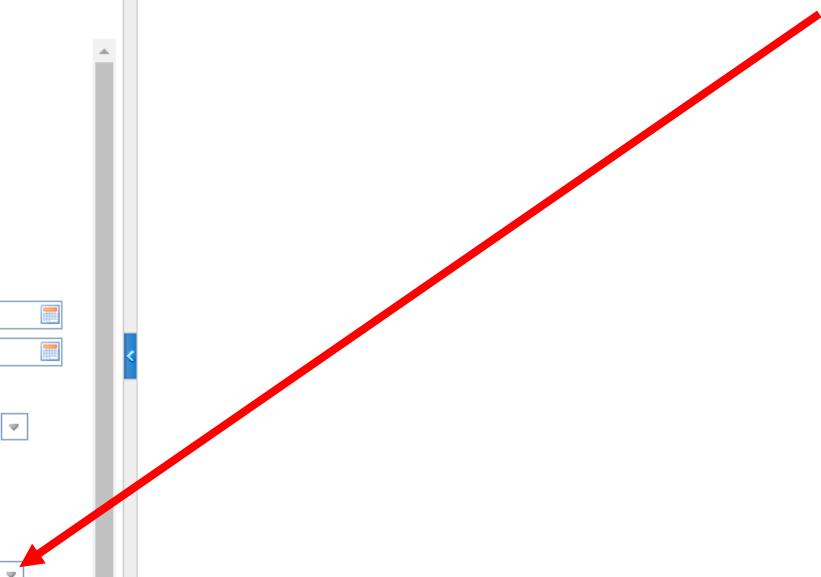
Order Search by:  Processed  Unprocessed

View Results by:  Header  Detail  
Types:  Customer  PO  Stock-to-Stock  
Line Types:  Open Item  Closed Item  
 Open Msg w/ \$  Open Msg w/o \$  Closed Message

Filter Fields by:  
Suppressed Spcl PO?   
Company: 0  
Account#:   
Branch:   
Warehouse:   
Salesperson 1:   
Job Name:   
Order Date: 10/01/22 to   
Ship Date:  to   
Customer PO:   
Item#:   
Product Line:   
Item Class 1:   
Message(s):   
Retail Customer: MICHAEL HALL  
Supplier:   
Ship Via:   
Order Type:   
Initials:   
CQM Account:   
CQM Opportunity:   
COM Job Quote#:

Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name
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Option to serach by customer name



Reference#:

Order#:

Include Rollovers?

Order Search by:

	Order Date	Order#	Reference#	Name	Account#	Ship Date	Customer PO#	Branch	Warehouse	Salesperson 1	Order Total	Retail Name	Billto Name	In
<input type="button" value="▶"/>	10/31/22	300299	1182880	MICHAEL HALL	000099	10/31/22	919-673-2611	ANA	ANA	ANA	30.17	MICHAEL HALL	CONTRACTOR CASH SALES - ANA	▲

1 of 1

25 records ▼