Frustrated with your current software?

Tired of systems that just don't work?

Spending too much time chasing your tail?

Software That Works for YOU

EZiBusiness

Customer Centered Business Management Software

www.ezidata.com.au

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Customer Sales

Business Pro lets you schedule meetings, follow-up phone call and other Customer related Tasks so that you will never forget that important phone call, email or meeting.

The Customer Sales component contains two primary screens, the Customer Sales List screen and the Customer Sales Details screen. Access to the Customer Sales List screen is gained by **clicking** the CUSTOMERS button on the Main Menu, followed by the CUSTOMER SALES option.

Types of Sales Documents:

The *Customer Sales* component provides three types of sales documents, Quotes, Orders and Invoices. To help identify which document you are viewing, most components utilising Customer Sales separate these three document types.

Quotes represent potential future purchases of goods or services, where the Customer has not yet indicated their willingness to proceed.

Orders represent approved purchases where the Customer has indicated their willingness to proceed with the purchase, but the goods or services have not yet been provided.

Invoices represent purchases where the Customer has received, or will shortly receive the goods and services they requested.

Layout of Sales Documents:

The *Customer Sales* component provides three layouts of sales documents, Item, Time-Billing and Miscellaneous. The Layout to use for a sales document should be determined by selecting the most appropriate Layout for the goods or services being provided.

Items represent goods or services that are commonly sold in single or multiple units. Items may be a tangible object, such as a hardware product, or they may represent fixed services, where the price and conditions remain constant from sale to sale.

Time-Billing is utilised where service are costed according to the time spent carry out that task. This layout is best suited to professions, such as Architects and trades, such as Plumbers.

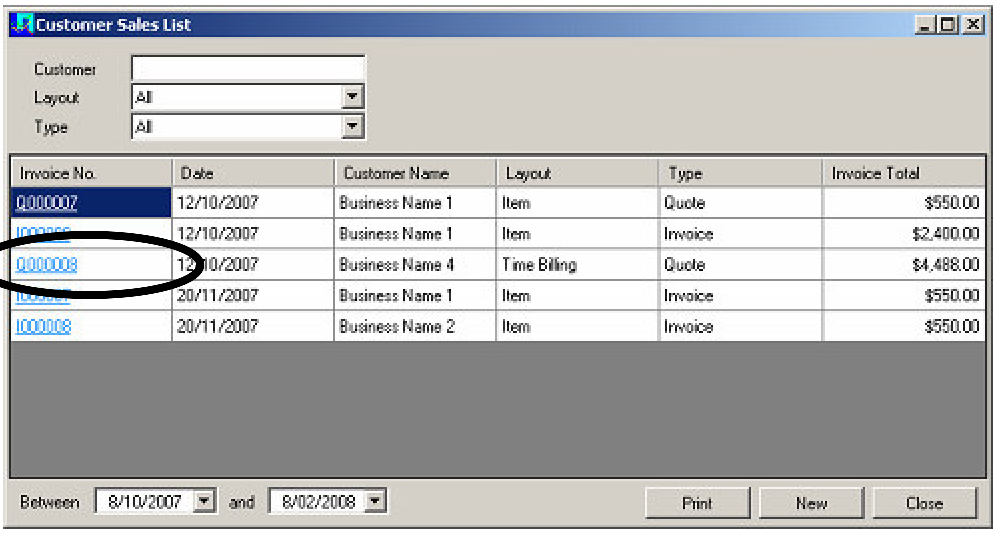
Miscellaneous sales can be used whenever Items or Time-Billing are not appropriate This may include labour costs charged as a fee not related to time or non-standard products, which are not expected to be utilised in future sales.

The Customer Sales List Screen:

The *Customer Sales List* screen provides a snap-shot of information about Sales transactions relating to your Customers. The screen contains Header, Detail and Footer sections (see **Error! Reference source not found.**).

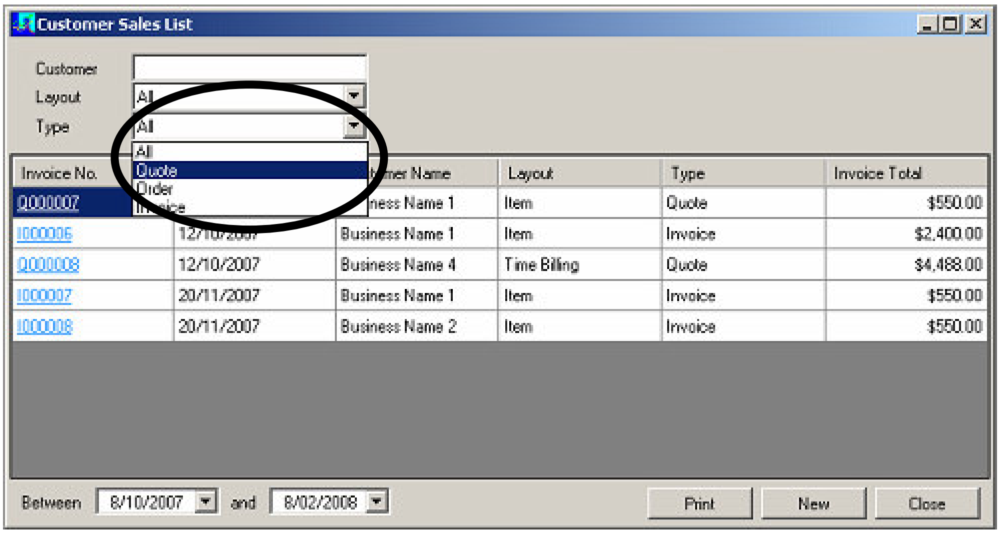
Filters available in the Header section include a Customer Name Search, Layout filter and a Type Filter. You can use any combination of Filters to refine your search process.

Opening the Details Screen



Double mouse click on an underlined *Invoice Number* to open the Customer Invoice screen (see **Error! Reference source not found.**)

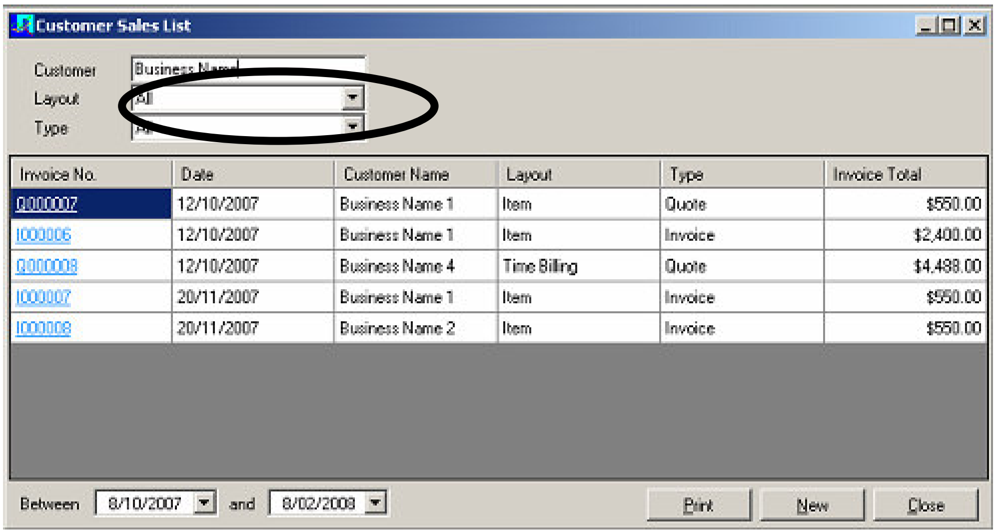
Filtering Records



By selecting an option from the **Layout Filter** or **Type Filter**, you can filter the list to show only those records that match your selection.

By default, this screen filters Customer Sales using the date range indicated in the Footer. **Mouse click** on one of the dates to open the calendar to select the date range.

Searching for Records



Simply type in the text you want to search for into the **Customer Name Search** and Business Pro filters the records to find any that match

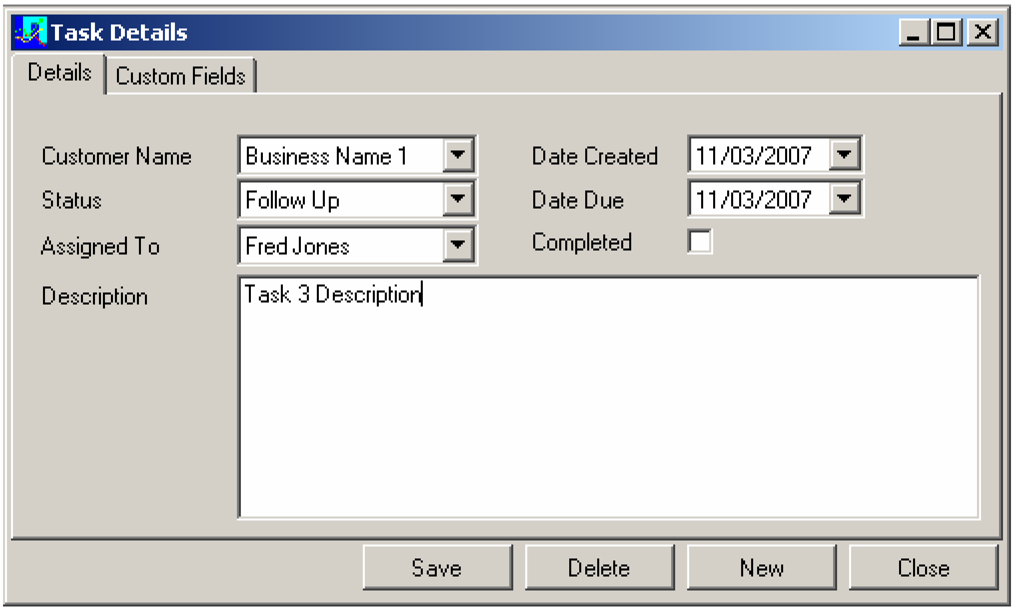
The more text you type, the narrower you search becomes.

Delete the text to remove the search and view all records.

The Customer Invoice Screen:

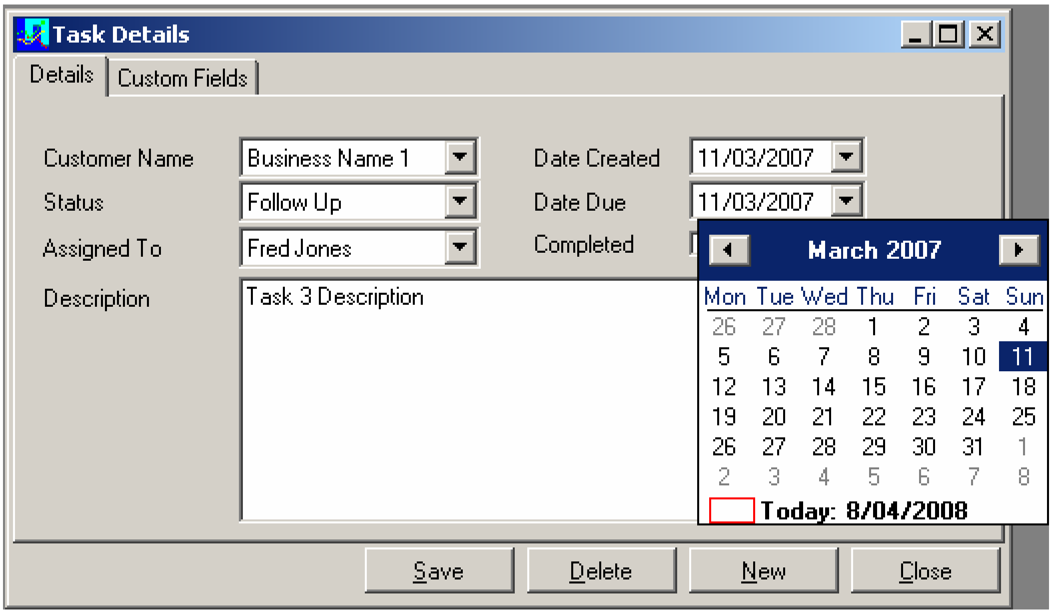
The *Customer Invoice* screen contains information pertaining to a Task assigned to a specific Customer. The screen contains data such as Status, Date Due the Task Description and the employee assigned the Task.

Setting Option Lists



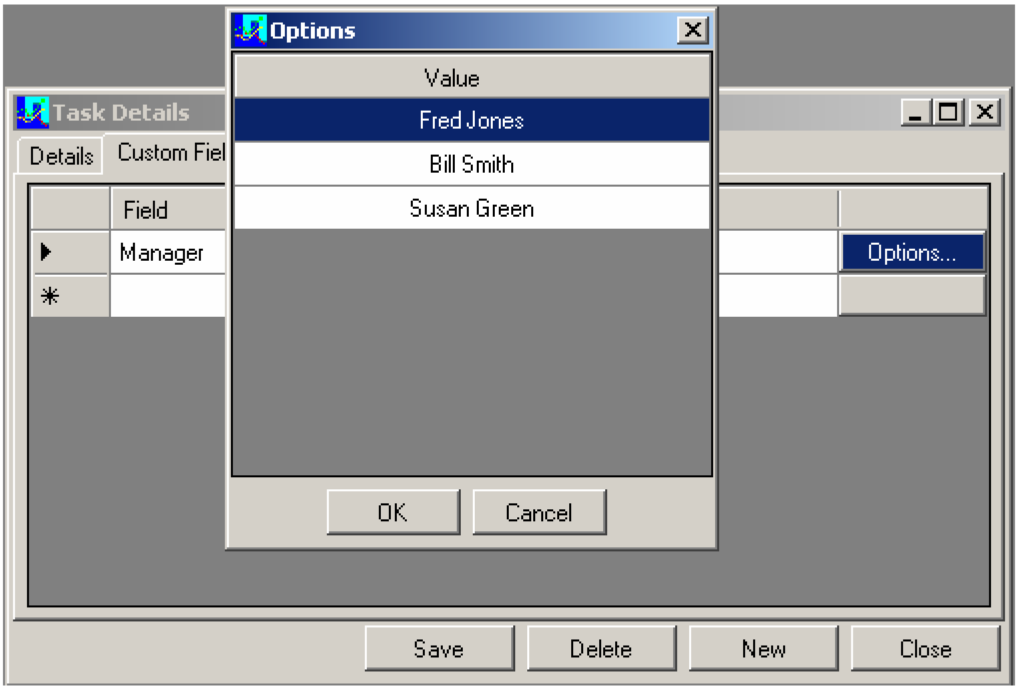
The list of available options for fields such as the **Status** field, can be altered using the related tab in the Settings screen.

Setting the Due Date



Double mouse click on the Date Created or Date Due field to open a Calendar from which to choose the required date.

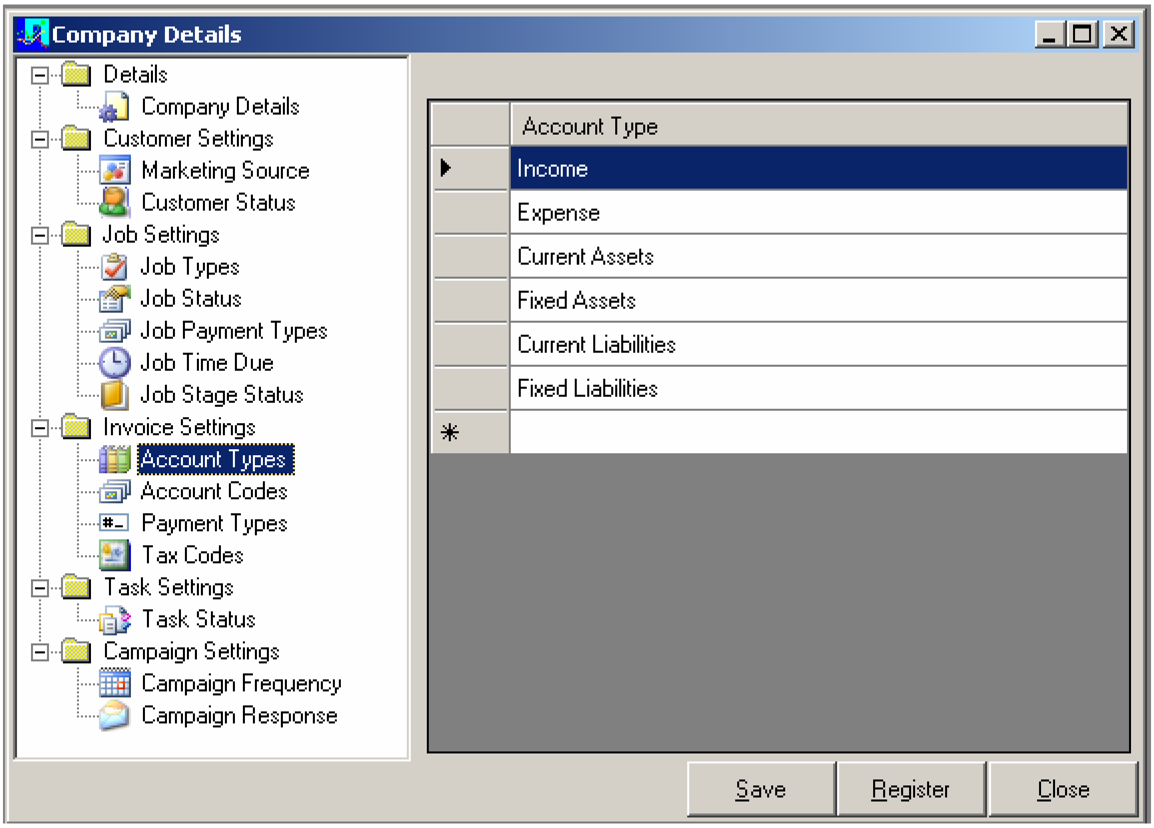
The Custom Fields Tab



Like most components in Business Pro, the Task Component can be customised to suit your requirements with the use of **Custom Fields**.

Single mouse click on the *Options* button to see a list of available values for this Custom Field.

Customer Sales Options:



- **Click** the JOB SETTINGS item on the *Company Details* screen to view all available Option lists.
- **Click** either the Account Types, Account Codes, Payment Types or Tax Codes commands to view a list of options for these fields.
- Edit any existing values, or add a new value at the bottom of the list.