

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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Customers

The customers are the central component of Business Pro on which all other components rely and are linked. Depending on your organisation, a customer may represent an individual person, a business entity or a department within a large enterprise.

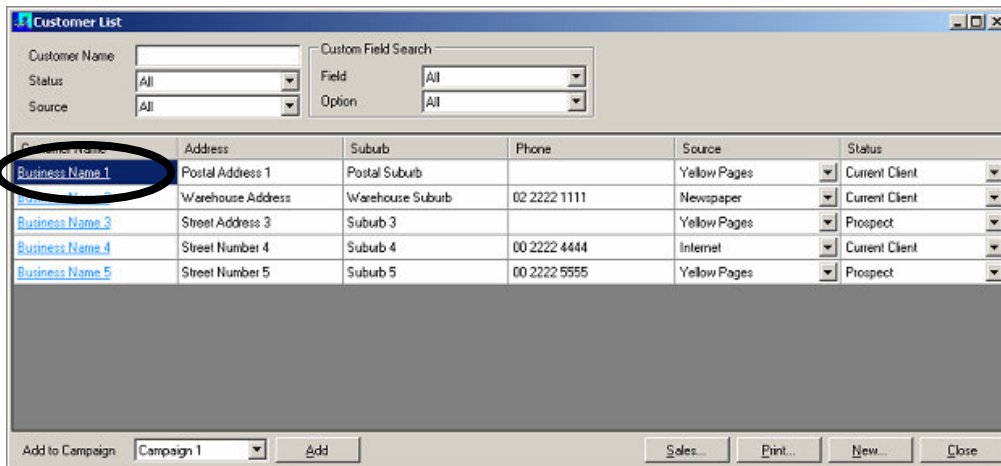
The Customer component contains two primary screens, the *Customer List* screen and the *Customer Details* screen. Access to the *Customer List* screen is gained by **clicking** the CUSTOMERS button on the Main Menu, followed by the CUSTOMER MAINTENANCE option.

The Customer List Screen:

The *Customer List* screen provides a snap-shot of information about your Customers. The screen contains Header, Detail and Footer sections.

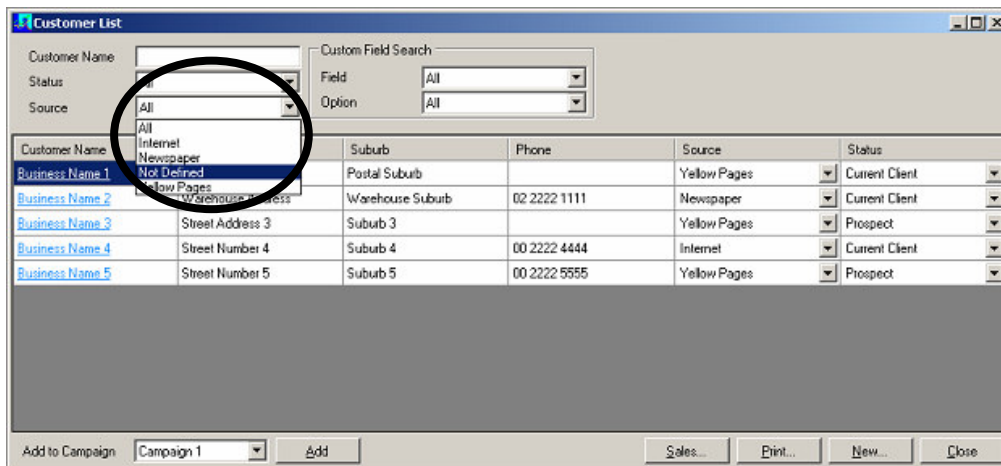
Filters available in the Header section include a Customer Name Search, Status filter and a Source Filter. You can use any combination of Filters to refine your search process.

Opening the Details Screen



Double mouse click on an underlined Customer Name to open the Customer Details screen (see The Customer Details Screen:)

Filtering Records



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

Searching for Records

Customer Name	Address	Suburb	Phone	Source	Status
Business Name 1	Postal Address 1	Postal Suburb		Yellow Pages	Current Client
Business Name 2	Warehouse Address	Warehouse Suburb	02 2222 1111	Newspaper	Current Client
Business Name 3	Street Address 3	Suburb 3		Yellow Pages	Prospect
Business Name 4	Street Number 4	Suburb 4	00 2222 4444	Internet	Current Client
Business Name 5	Street Number 5	Suburb 5	00 2222 5555	Yellow Pages	Prospect

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 your search becomes.

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

The Customer Details Screen:

The *Customer Details* screen contains the complete history and information pertaining to a Customer. The screen contains data such as the primary address, contact names and phone numbers, as well as tabs displaying information on various components, such as the Tasks assigned for this Customer.

The Primary Address

Customer Name: Business Name 1

Primary Address: Postal Address

Address: Postal Address 1

Suburb: Postal Suburb

Postcode: P/Code

State: State

Primary Contact: Fred Smith

Phone1: []

Phone2: []

Fax: []

Email: []

Source: Yellow Pages

Status: Current Client

When creating a new Customer, you can choose the type of **Primary Address**, either Street Address or Postal Address.

In addition, you can also add multiple addresses for the Customer using the ADDRESSES tab.

Setting Option Lists

Customer Name: Business Name 1

Primary Address: Postal Address

Address: Postal Address 1

Suburb: Postal Suburb

Postcode: P/Code

State: State

Primary Contact: Fred Smith

Phone1: []

Phone2: []

Fax: []

Email: []

Source: Yellow Pages

Status: Current Client

Options for Status: Current Client, Not Defined, Prospect, Current Client

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

The Addresses Tab

Address Name	Address	Suburb	Phone1
<u>Postal Address</u>	Street Number 1	Suburb 1	00 2222 1111
<u>Postal Address</u>	Postal Address 1	Postal Suburb	

Buttons: Save, Delete, New, Close

The ADDRESSES Tab contains a list of addresses this Customer operates from, such as a warehouse or distribution centre.

Double mouse click on an underlined Address Name to open the Address Details screen (see Customer Address Details).

The Contacts Tab

First Name	Last Name	Works At	Phone1
<u>Kathy</u>	Brown	Postal Address	
<u>Kathy</u>	Brown	Postal Address	

Buttons: Save, Delete, New, Close

The CONTACTS Tab contains a list of personnel working for this Customer who are relevant to your organisation.

Select an option from the **Works At** list to record the Address where this Contact usual works.

Double mouse click on an underlined First Name to open the Contact Details screen (see Customer Contact Details).

The Jobs Tab

Job No.	Date Due	Description	Status
<u>J0000016</u>	10/10/2007	Job 1 Description	Active
<u>J0000017</u>	1/03/2007	Job 2 Description	Inactive
<u>J0000018</u>	3/03/2007	Job 3 Description	Active
<u>J0000019</u>	20/10/2007	Job 4 Description	Active
<u>J0000027</u>	28/03/2008	Job 5 Description	Inactive

Buttons: Save, Delete, New, Close

The *Jobs* Tab contains a list of jobs being carried out, or already carried out for this *Customer*.

Select an employee who will complete this Task from the *Assigned To* list.

Double mouse click on an underlined *Job Number* to open the *Job Details* screen.

The Quotes, Orders and Invoices Tabs

Quote No.	Invoice Date	Layout	Quote Total
Q000006	12/10/2008	Item	\$2,400.00
Q000007	12/10/2007	Item	\$550.00
Q000002	3/10/2007	Item	\$1,750.00
Q000001	2/10/2007	Item	\$1,100.00

\$5,800.00

Print New

Save Delete New Close

The *Quotes*, *Orders* and *Invoices* Tabs contain a list of *Sales* documents that have been created for this *Customer*.

The documents *Invoice Type* determines which *tab* the document appears in.

Double mouse click on an underlined *Invoice Number* to open the *Customer Invoice* screen.

The Payments Tab

Payment No.	Date Paid	Type	Amount Paid	Allocated
0000001	11/08/2007	Credit Card	\$410.00	\$410.00
0000003	2/10/2007	Credit Card	\$490.00	\$490.00
0000005	12/10/2007	Credit Card	\$240.00	\$240.00
0000006	12/10/2007	Credit Card	\$200.00	\$200.00

\$1,340.00 \$1,340.00

Print New

Save Delete New Close

The *Payments* Tab contains a list of *Payments* that have been made by this *Customer*.

Double mouse click on an underlined *Payment Number* to open the *Customer Payment* screen.

The Tasks Tab

Date Due	Description	Assigned To	Status
12/03/2007	Task 4 Description	John Smith	Phone Call
11/03/2007	Task 3 Description	Fred Jones	Follow Up

New

Save Delete New Close

The *TASKS* Tab contains a list of tasks being carried out, or already carried out for this *Customer*.

Select an employee who will complete this *Task* from the **Assigned To** list.

Double mouse click on an underlined *Description* to open the *Task Details* screen.

The Campaigns Tab

Campaign Name	Date Due	Type	Response
<u>Campaign 1</u>	23/10/2007	Letter Box Drop	Requested Information
<u>Campaign 2</u>	28/10/2007	Print Media	Not Interested
<u>Campaign 4</u>	22/11/2007	Mail Out	Not Defined
<u>Campaign 5</u>	17/10/2007	Letter Box Drop	Not Defined

The CAMPAIGNS Tab contains a list of Campaigns this Customer has been assigned to.

Select an option from the **Response** list to record this Customer's response to a Campaign.

Double mouse click on an underlined Campaign Name to open the Campaign Details screen.

The Custom Fields Tab

Field Name	Value
Website	Awaiting Feedback
Credit Rating	Good
*	Need to Watch
	Cash Only

Like most components in Business Pro, the Customer 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 Address Details

Customer Name	Business Name 1	Phone1	00 2222 1111
Address Name	Postal Address	Phone2	00 2222 2222
Address	Street Number 1	Fax	00 2222 4444
		Email	sales@ezidata.com.au
Suburb	Suburb 1		
Postcode	Postcode		
State	State		

Edit, add New and Delete Customer Address records using the Address Details screen.

Choose an existing Customer from the **Customer Name** list and enter the required information in the boxes provided.

Customer Contact Details

The screenshot shows a window titled "Contact Details" with the following fields and values:

Customer Name	Business Name 1	Phone1	00 1111 3333
First Name	Kathy	Phone2	
Last Name	Brown	Fax	
Position	IT Manager	Email	
Works at	Postal Address		

Buttons at the bottom: Save, Delete, New, Close.

Edit, add New and Delete Customer Contact records using the Contact Details screen.

Choose an existing Customer from the **Customer Name** list and enter the required information in the boxes provided.

Customer Options:

The screenshot shows a window titled "Company Details" with a tree view on the left and a list of marketing sources on the right.

Tree View (Left):

- Details
 - Company Details
- Customer Settings
 - Marketing Source
 - Customer Status
- Job Settings
 - Job Types
 - Job Status
 - Job Payment Types
 - Job Time Due
 - Job Stage Status
- Invoice Settings
 - Account Types
 - Account Codes
 - Payment Types
 - Tax Codes
- Task Settings
 - Task Status
- Campaign Settings
 - Campaign Frequency
 - Campaign Response

Main Area (Right):

Marketing Source
Newspaper
Yellow Pages
Internet
*

Buttons at the bottom: Save, Register, Close.

- **Click** the CUSTOMER SETTINGS item on the *Company Details* screen to view all available Option lists.
- **Click** either the Marketing Source or Customer Status 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.