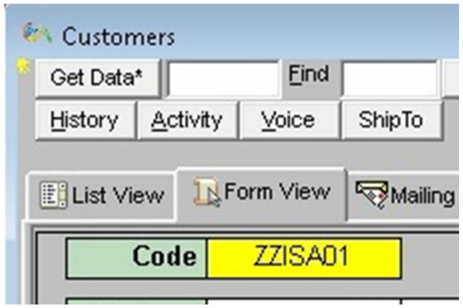
Customer Master

Customers are the most important people of every business and it is a must to organize and maintain information related to customers.

The **Customer** portion of Winfashion allows you to store and manage your customer information in a flexible and efficient manner.

WinFashion "Customer" list holds customer address, phone number, credit limit, purchase history, balances and more. You can view several reports based on a customer with a click of a button. Also, each customer can have more than one address (shipping address) listed in this section (Remember the address that you put in the main customer screen is the mailing/billing address).

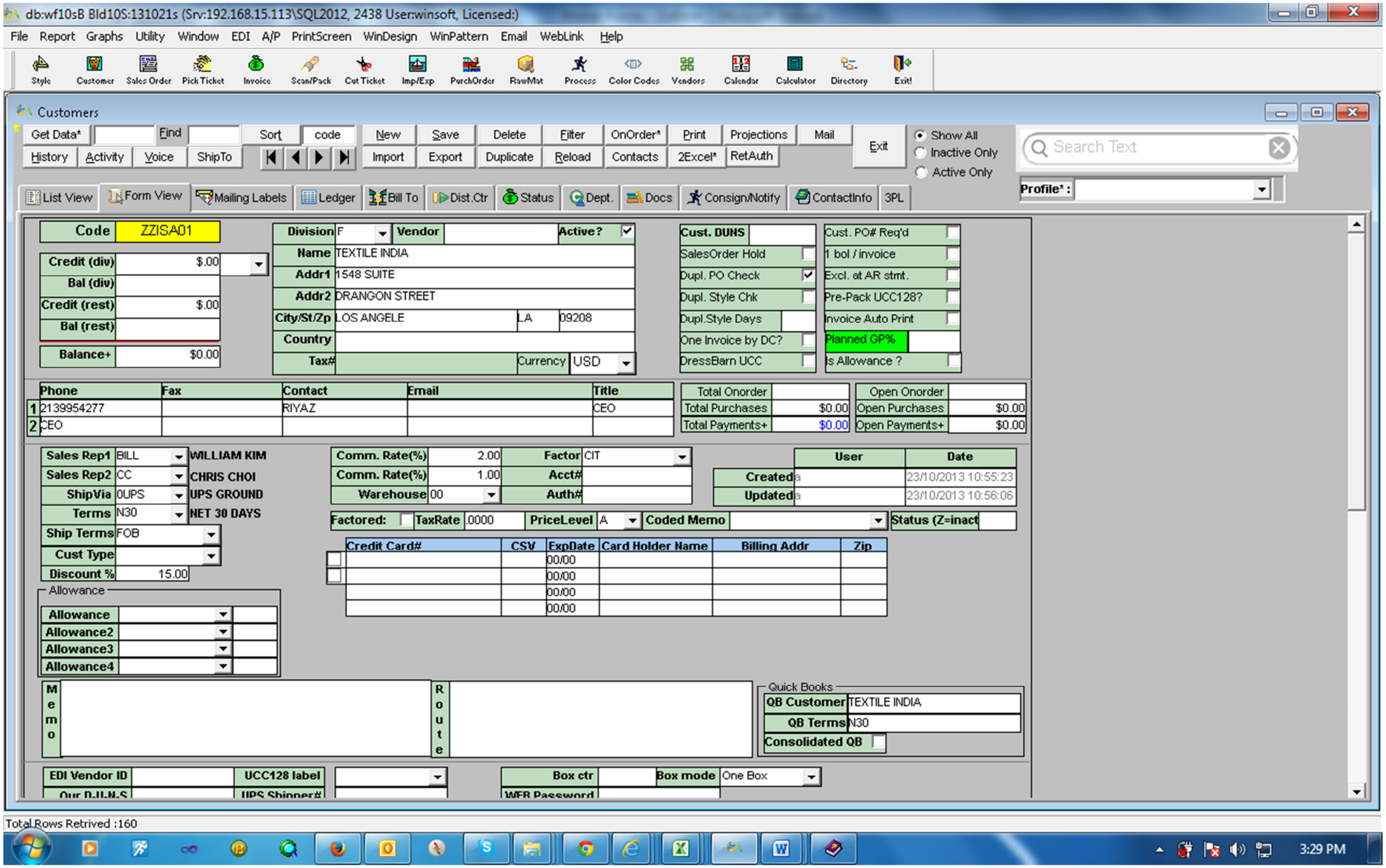
Initially, you should familiarize yourself with this section before entering any information.



NOTE:

*The code is a **code** you assign to your customers for easy recognition. Usually, it is the first four letters of the customer or a customer name and zip code combination.

*The tabs such as "List View" or "Form View" allow you to **view or input** customer information in different formats. You can go to the tab by clicking on it.


db:wf10sB Bld10S:131021s (Srv:192.168.15.113\SQL2012, 2438 User:winsoft, Licensed:)
File Report Graphs Utility Window EDI A/P PrintScreen WinDesign WinPattern Email WebLink Help
Style Customer Sales Order Pick Ticket Invoice Scan/Pack Cut Ticket Imp/Exp PurchOrder RawMat Process Color Codes Vendors Calendar Calculator Directory Exit!
Customers
Get Data* Find Sort code New Save Delete Filter OnOrder* Print Projections Mail Exit
History Activity Voice ShipTo Import Export Duplicate Reload Contacts 2Excel* RetAuth
Show All
Inactive Only
Active Only
Search Text
Profile* :
List View Form View Mailing Labels Ledger Bill To Dist.Ctr Status Dept. Docs Consign/Notify ContactInfo 3PL
Code ZZISA01
Credit (div) $.00
Bal (div)
Credit (rest) $.00
Bal (rest)
Balance+ $0.00
Division F Vendor Active?
Name TEXTILE INDIA
Addr1 1548 SUITE
Addr2 DRANGON STREET
City/St/Zp LOS ANGELE LA 09208
Country
Tax# Currency USD
Cust. DUNS
SalesOrder Hold
Dupl. PO Check
Dupl. Style Chk
Dupl.Style Days
One Invoice by DC?
DressBarn UCC
Cust. PO# Req'd
1 bol / invoice
Excl. at AR stmt.
Pre-Pack UCC128?
Invoice Auto Print
Planned GP%
Is Allowance ?
Phone Fax Contact Email Title
1 2139954277 RIYAZ CEO
2 CEO
Total Onorder
Total Purchases $0.00
Total Payments+ $0.00
Open Onorder
Open Purchases $0.00
Open Payments+ $0.00
Sales Rep1 BILL WILLIAM KIM
Sales Rep2 CC CHRIS CHOI
ShipVia 0UPS UPS GROUND
Terms N30 NET 30 DAYS
Ship Terms FOB
Cust Type
Discount % 15.00
Comm. Rate(%) 2.00
Comm. Rate(%) 1.00
Warehouse 00
Factor CIT
Acct#
Auth#
User Date
Created 23/10/2013 10:55:23
Updated 23/10/2013 10:56:06
Factored: TaxRate .0000 PriceLevel A Coded Memo Status (Z=inact
Credit Card# CSV ExpDate Card Holder Name Billing Addr Zip
00/00
00/00
00/00
00/00
Allowance
Allowance
Allowance2
Allowance3
Allowance4
Memo
Route
Quick Books
QB Customer TEXTILE INDIA
QB Terms N30
Consolidated QB
EDI Vendor ID UCC128 label Box ctr Box mode One Box
Our D-U-N-S UPS Shipper# WEB Password
Total Rows Retrieved :160
3:29 PM

Entering Customers into Winfashion

This command allows you to view and input your customer's information such as name, address, contact, and credit limit.

- Click **File** on the **Menu** bar
- Choose **Master File**

-OR-

- Click on the **Customer** button on the tool bar
- Select **Customer**
- Click on the **New** button to enter your customer's information
- Create a **customer code** for your customer. For example, you can use part of the company name and company zip code for the code such as "Fash90079" for the company "Fashion, Inc."
- Enter the **customer's** credit limit if applicable
- The "**Purchases, Payments, Balances, and Onorder**" information will automatically appear based on the information entered in the sales order, invoice, cash posting, and other areas of Winfashion.
- **Select your company's division** that is associated with this customer if applicable. You can edit or add divisions in the Division code table.
- Enter **the name, address, phone numbers, and contact information** in the respective boxes.
- **Select a sales representative** that is associated with this customer. You can pick two if necessary. And enter the commission rate for each sales rep.
- **Select the terms** for this customer. If you would like to edit or create a term, read more about the terms code table.

- **Select the ship via** or shipping method for this customer's orders. If you would like to edit or create a ship via, read more about the ship via code table.

- **Enter the Factor** information if applicable.

  Next to "Factor", type the factor's company name

  Next to "Acct#", type in the customer's factor account number

  Next to "Auth#", type in the customer's factor Authentication number

  Next to "Stat" (Status), type in the customer's factor status. For example, you can type in "approved" or "declined". Usually you would enter this information in the sales order. You can leave this box blank so that you could type in the status for each order.

- Type in the **tax rate** if applicable

- Select a **price level** you would charge this particular customer. Each customer may have a different price level. The price level is set in the style master.

- You can create a status for this customer by entering a letter next to "**Status**:" For example, you can use the letter "**A**" for **approved** and "**H**" for **hold** so the person entering the sales order will know how to proceed with this customer. This box is optional and does not need to be filled in.

- **Enter any memo** about this customer in the **memo field**. You can type an unlimited amount of information here. This memo field will appear/print only in this section.

- If a customer needs your company to have **vendor information**, enter it in this box.

- If you need to enter **EDI** information

- If you need to enter **Credit Card** information

- After entering all necessary information, click on the **Save** button

Customer Master – Common Buttons

Import Button 

The **Import** button is used to import Winfashion related information from a **DOS** file **\FASHION\IMPORT.DBF** (a database file compatible to **DBASE, FOXPRO, CLIPPER,** etc.).

> To **import** text into WinFashion, copy the text from the desired **.dbf** file and paste it onto the clipboard.
>
> **NOTE**: You can only import text from a **.dbf** file, database compatible file, and a DOS file.
>
> From the clipboard, you can import using the **import button** on the screen.
>
> Once you click on the **import button**, a screen will prompt you to import from Windows.

Export Button 

Excel

This command allows you to use **EXCEL**, a very powerful accounting software created by **MICROSOFT™.** Some of the things you could do with EXCEL are spreadsheet-manipulation, creation of supplementary reports (graph, changing icons, adding headers, footers, etc.) and a lot more. For more information on **EXCEL**, consult an **EXCEL** manual and/or run it and see its on-line help.

- **Highlight** the items to be exported
- To **export** from WinFashion, click on the **Export** button
- Select the file that you want to save your WinFashion information in.
- Enter a **File** Name

- Save As Type: enter **Excel with Headers**
- Click on the **Save** Button

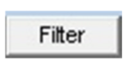
At Excel

- Select **File**
- Choose Open and select the saved file
- **To Generate Subtotals**
- Go to **Subtotals** of the Menu Bar
- Select Data Subtotals
- Enter the **Column**
- Enter **Sum** at "**Use Function**"
- Check all items to be subtotaled at "**Add Subtotal To**:"
- Click on **OK**

Delete Button 

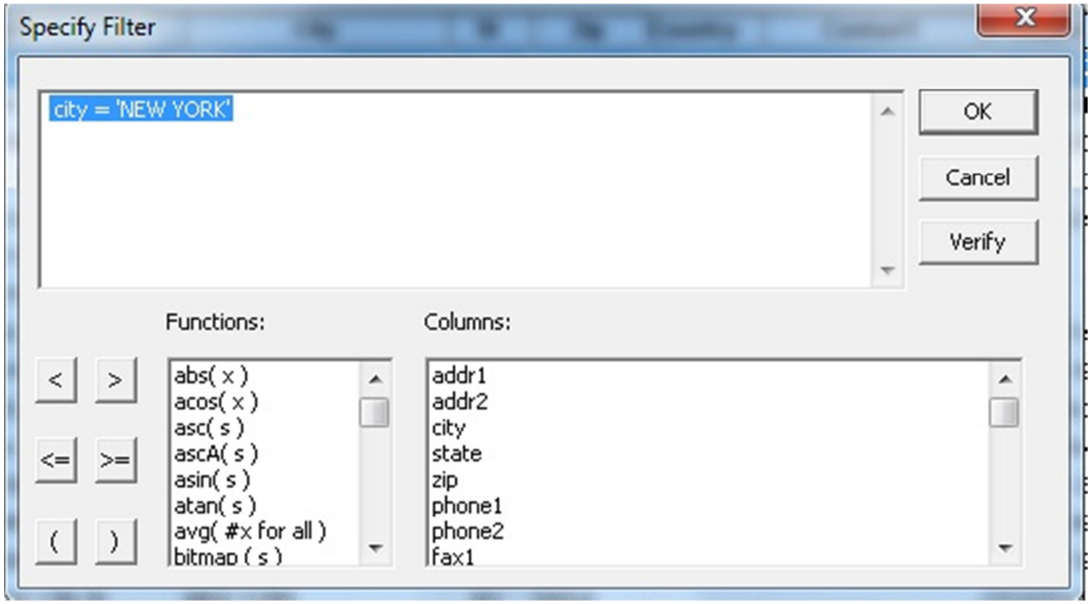
- The **Delete** button is used to delete a **row/record** from the list, table, or line (click **Delete**).

- If you click **Delete**, the program will confirm deletion (click **Yes** to do so and **No**, otherwise).

Filter Button 

The main function of the **filter button** is to separate certain information from the rest within a specific topic. It is especially useful in the reports when you want to see specific information and not the rest of the report. For example, for the zip code table, you might only wish to see all cities for the state of New York. Another example of the filter button is in a report, you will see information from one date range to another based on sales order, customer, factor, and style information. But you just want to see all of the sales orders that are factored. Therefore, you can filter the sales order with factors only.

- Click **Filter** if you want to see rows of the list that meets a certain condition.
- The filter window prompts you to input a **filter condition**. The columns **Functions** (verb) and **Columns** (noun) appear.
- **TIP: Filter condition** strings are **case-sensitive** which means that upper case strings are different as compared to their lower case counterparts. For example, you want to filter one customer out of the whole list. In the customer listing, the City code is "NEW YORK" for New York. Therefore you would enter [city='NEW YORK'] also to filter. If you enter [city='new york'] (notice it is lower-case) the filter will not work.
- After typing **filter condition**, click **OK** to **Filter**, **Cancel** to exit or **Verify** to check the validity of the filter condition.



Print Button 

· The **Print** button is used to print information on the current window (click Print). There may be several options such as printing multiple pages, portrait/landscape mode, and print preview. If it does not begin printing, make sure you have a printer attached or networked to your computer (if it is networked, check the power of the computer that has the printer attached to it. Make sure the computer and printer's power is ON. If you have more than one printer networked, make sure you are printing to the correct printer), the printer driver is installed correctly in your computer, check the printer to see if the power is on, check the printer to see if it is offline or if there are any errors. For more information, refer to the owner's manual that came with the printer.

Duplicate Button 

The **Duplicate button** is used to copy the current record or line to a new record or line (click **Duplicate**).

Important Tip: For some tables (ex. **code table**), Winfashion will give an error message if you do not change the main code (primary key) for this duplicated record/row after clicking the Save button. For example, if you duplicate the color BLUE in the **colors code table** and click **Save**, an error message will appear (BLUE should not be in the list twice - click **OK**, type another code or **Delete** the duplicated record).

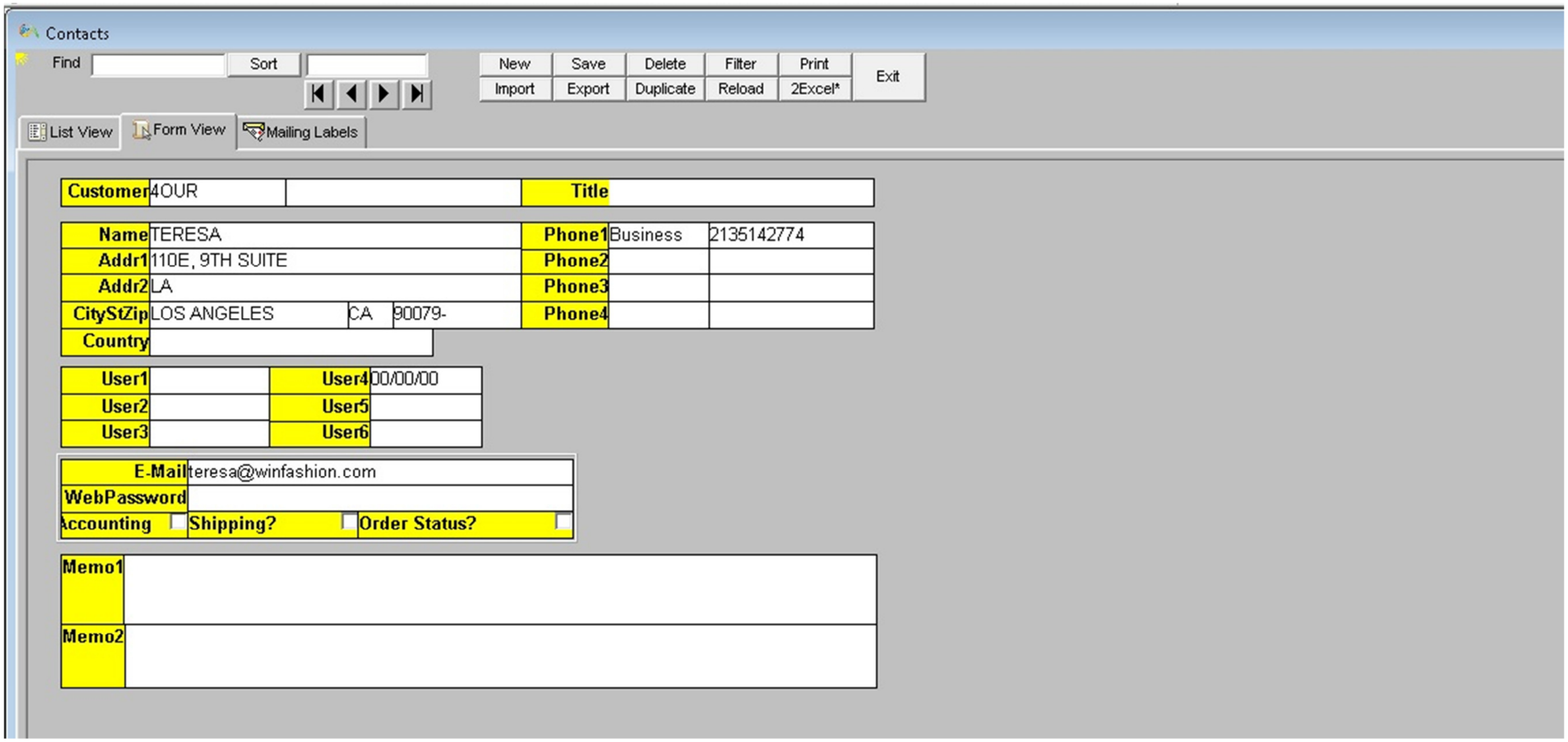
Reload Button 

Click the **Reload button** to refresh the information displayed on the current window (click **Reload**). Use this button when you want to **refresh/renew** the information on the current window. This button is useful when you go to **utility → recalculate** among other areas of Winfashion.

Contacts 

Contacts could be used for any additional contact information. The contact listing is in the same format as the customer listing. If you have more than two contacts for your customer, you can add the additional contacts here.

- Select **File**
- Click on **Contacts**
- To add a contact, click on the button
- Click on the button next to the customer field to **choose a customer** related to this contact
- Type in the name, phone number and address of the contact (and any additional information)
- Click on the **Save** button to save the contact information



2Excel 

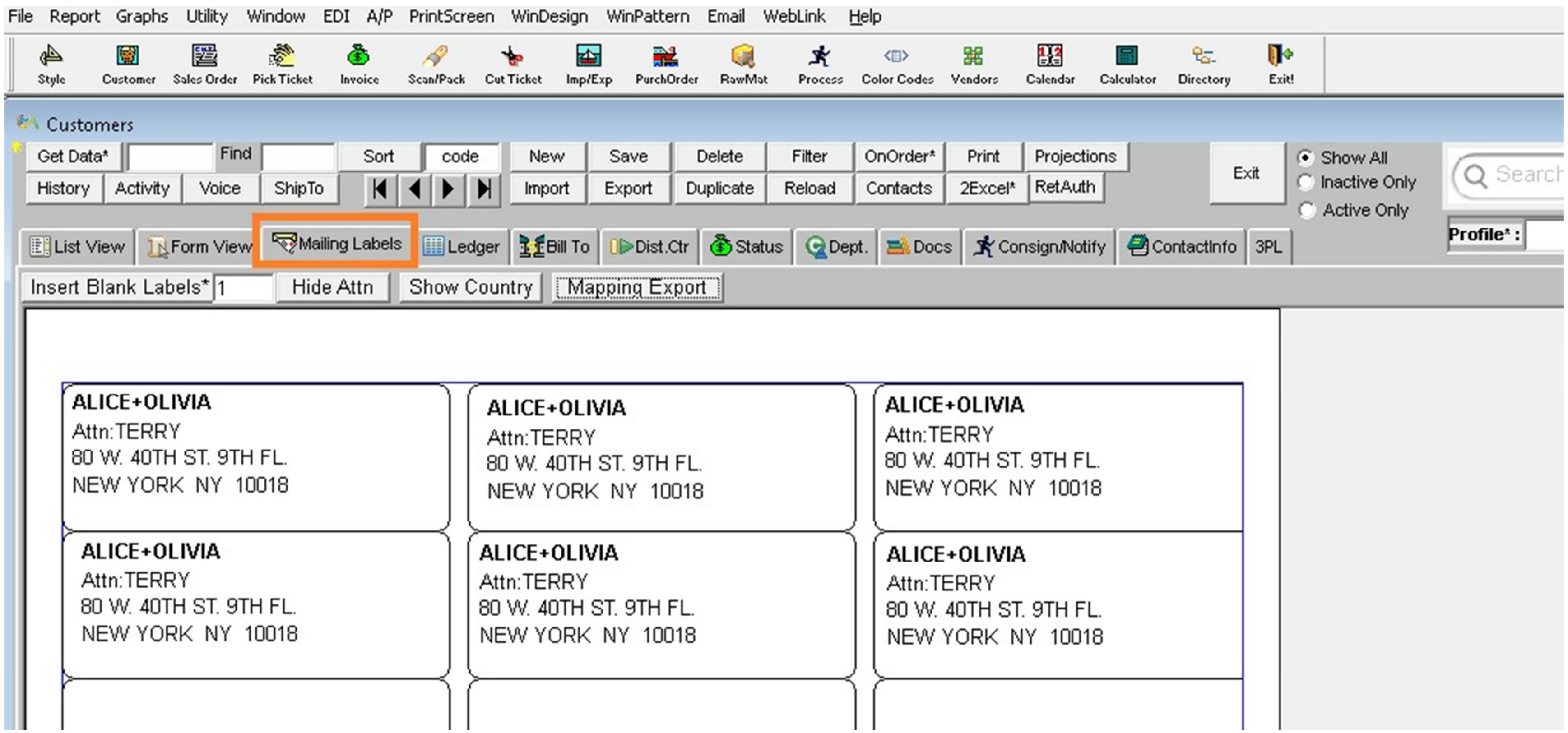
The **2Excel** button is used to save the customer information from WinFashion to Excel file with headers

- Click on **2Excel**
- Enter **File** name
- Click on the **Save** button

Customer Master TABS - Mailing Labels

Customer mailing labels are made from the customer list. Remember the **labels** are made from the customer information and you cannot manually input the information onto the labels. You can make labels by going to the **Customer List**, highlight the desired customers, and then click on the Mailing Labels tab.

WinFashion uses Avery 5160 mailing labels



To make customer mailing labels:

- Highlight the **customers** that you want to include on the mailing labels by holding down the <Ctrl> key and the left button of the mouse
- Click on the **Mailing Labels Tab**
- The customer information automatically enters in the **default mailing label** format.
- Click on the **Print** button

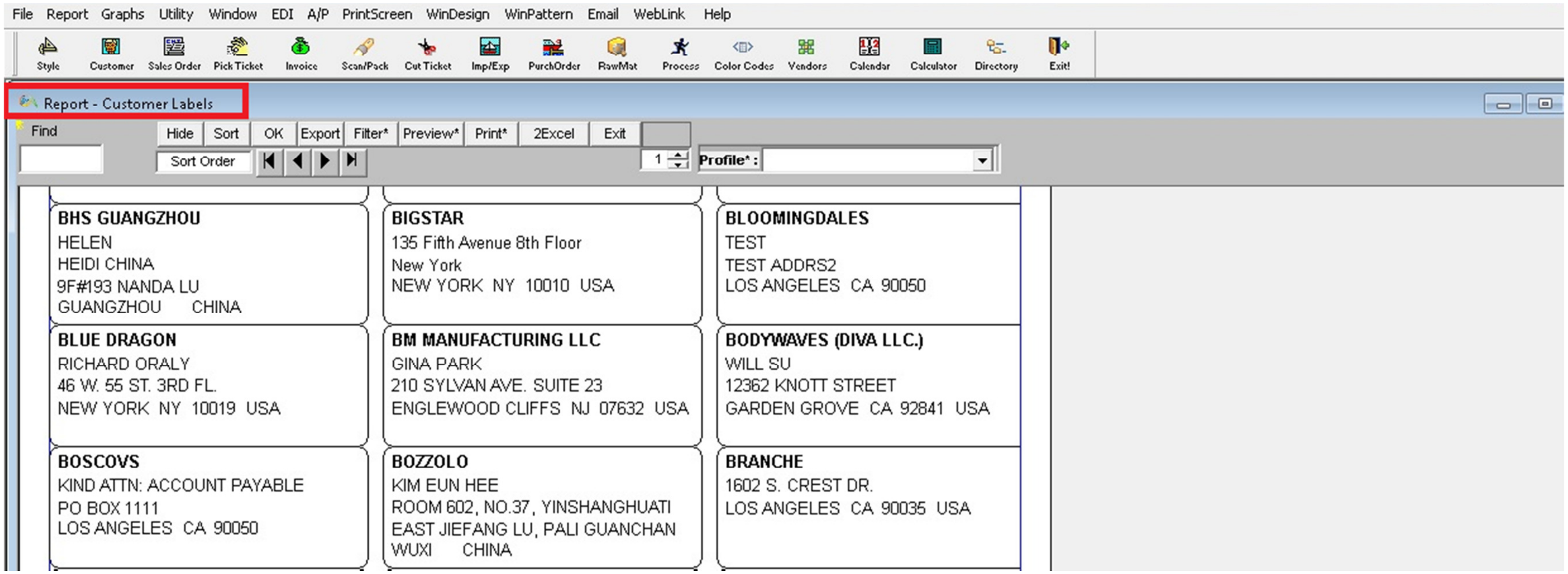
To make **customer mailing labels on a partially used label sheet**:

- Highlight the **customers** that you want to include on the mailing labels by holding down the <Ctrl> key and the left button of the mouse
- Click on the **Mailing Labels** Tab
- The customer information automatically enters in the default mailing label format.
- Click (keep clicking if there is more than one label missing) on the "**Insert Blank Labels**" button to move the addresses to where the labels begin.
- Click on the **Print** button

Customer Labels

This report allows you to create **customer labels** for all of your customers. Instead of typing all of your customer's information to make labels, this report automatically inputs your customer information to save you time.

NOTE: This report can be used for making **mass mailing labels** for your customers.



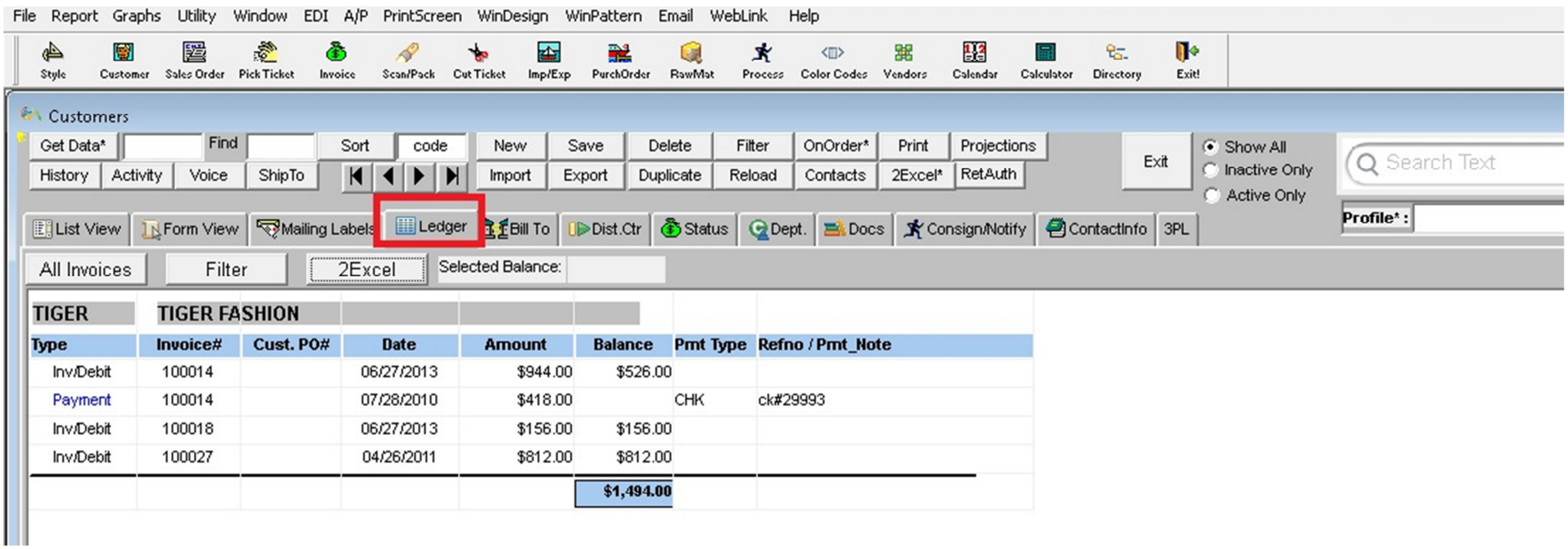
- Click **Report** on the Menu bar
- Choose **Master File**
- Select **Customer Label**
- Click on the **OK** button to retrieve the customer information
- To begin printing the labels, click on the **Print** button

Customer Ledger*

The customer **ledger** includes the **invoice, payment and credit memo** information for a customer. The ledger is located within the **Customer** section of Winfashion.

- Click on the **Customer button** on the tool bar
- To use the **Ledger**, highlight the customer in the **List View**
- Then click on the **Ledger** tab
- To see detailed reports that include the customer information, see the related section below.

To see all **invoices** related to the customer selected, click on  the button.



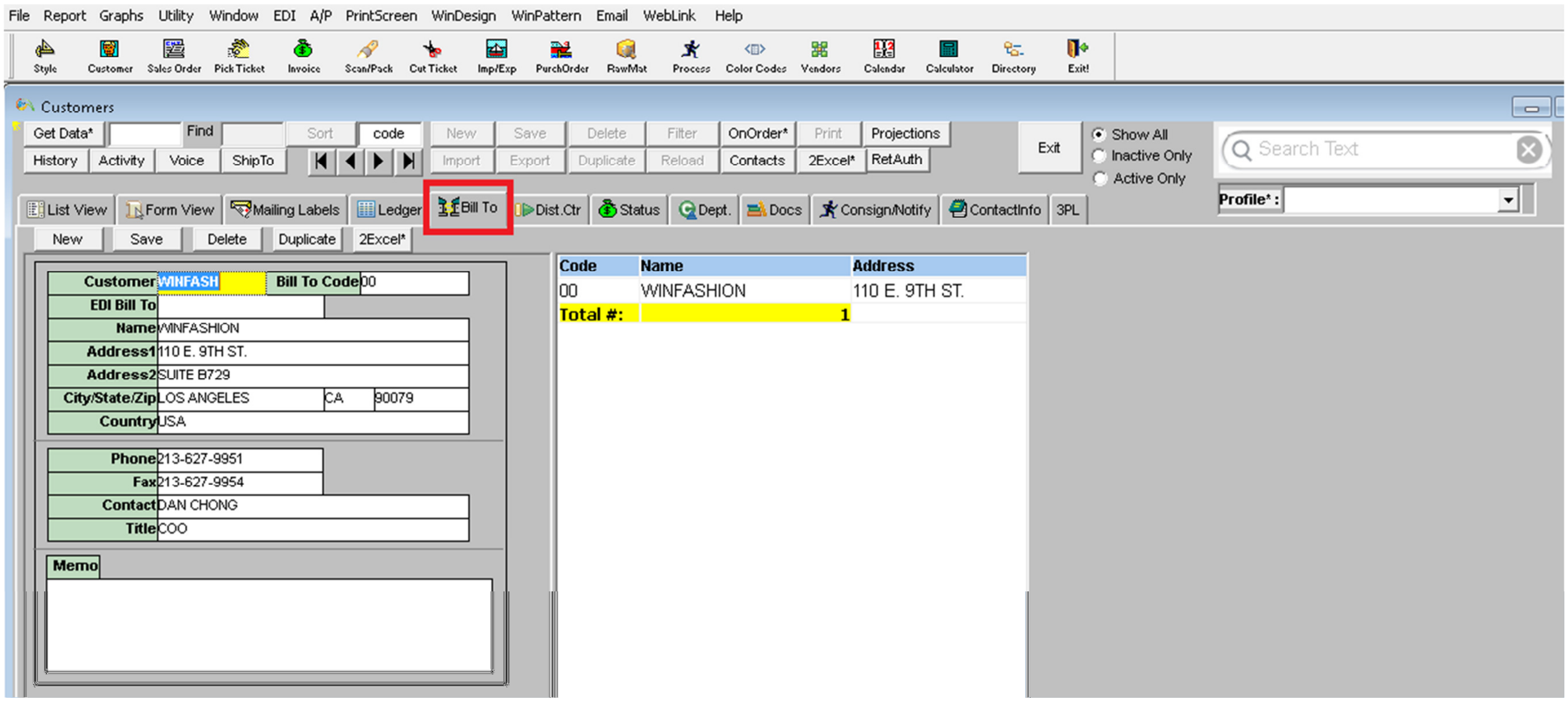
Bill To

This list in the Master File will show all Customers' **Bill To** information.

Go to File on the Menu Bar

Highlight Master File

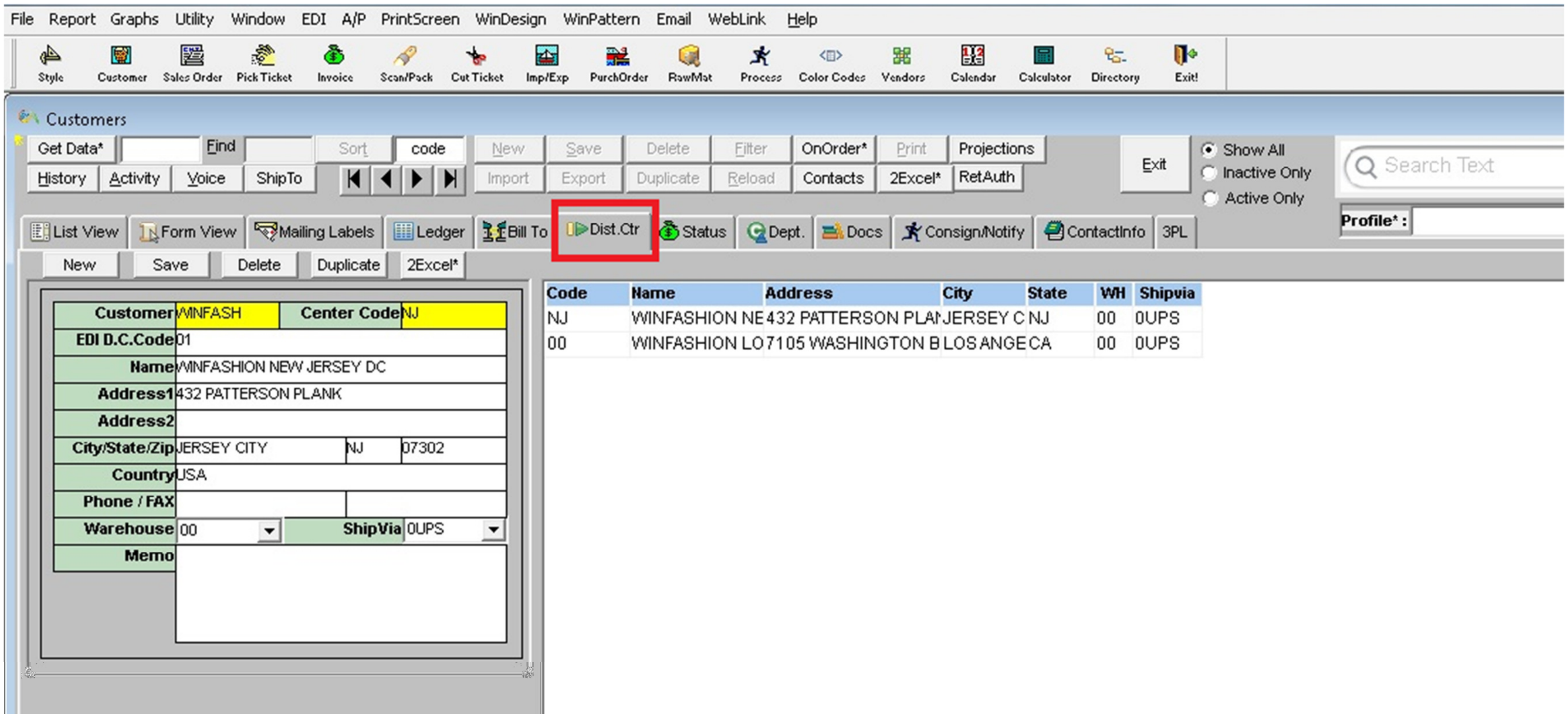
Click on **Bill To**



Distribution Centre

You can create distribution centers that are related to your Customers. Once you have entered the customers in the customer section, you can click on the **Dist. Ctr.** Tab

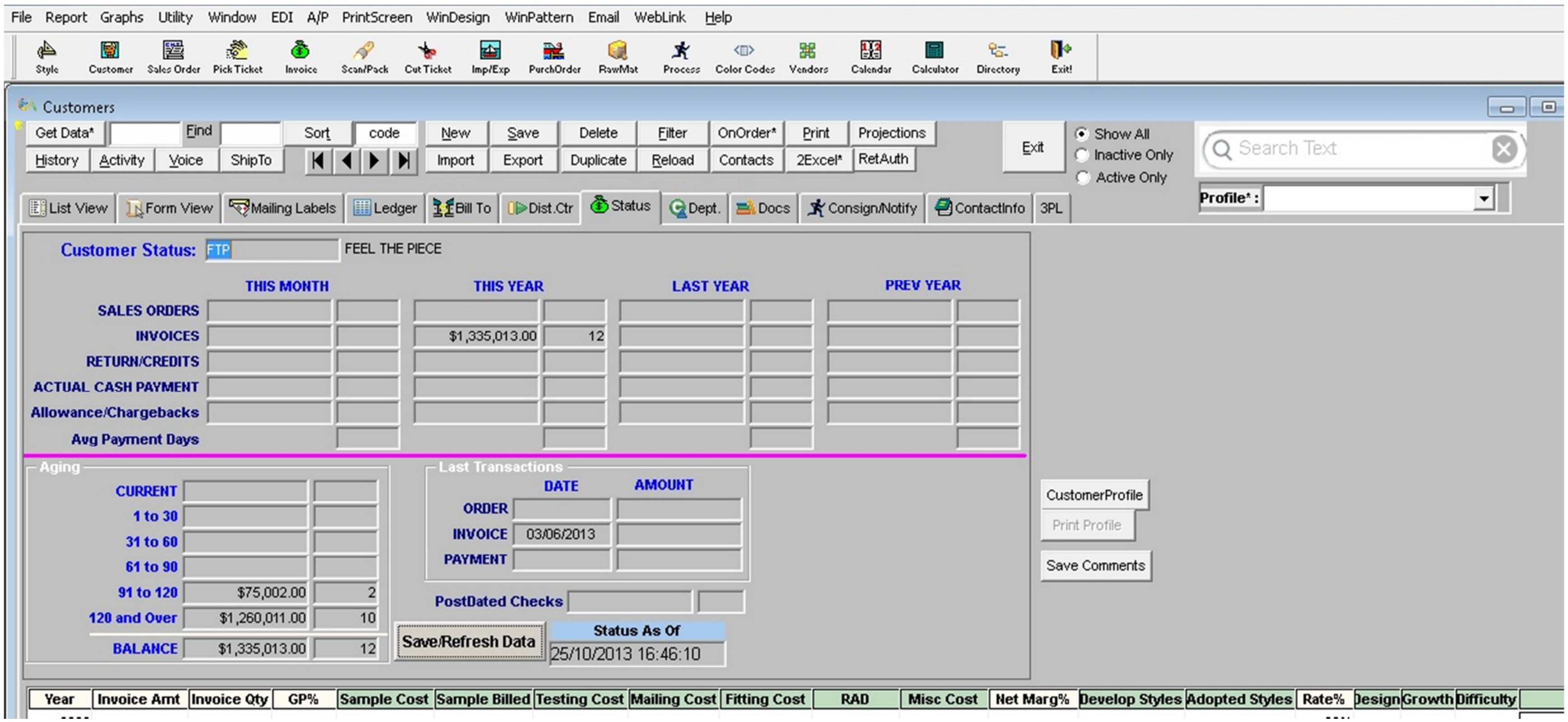
- Enter the customer information if you have not done so already
- Highlight the customer that you would like to relate to a distribution center
- Click on **Dist. Ctr.** Tab
- Click on the **New** button to create a distribution center
- Enter the necessary information then click on the **Save** button
- If you need to enter more distribution centers, keep clicking on the **New** button and enter the necessary information.
- If you need to export Excel format, Click on **2Excel** to save into Excel format of your Distribution Centre



Status

Status of Customer

The Status report shows you customer Sales Orders, Invoices, Returns /Credits, Actual Cash Payment and Allowance / Charge Backs for current Month, Current Year and Previous and Last year. A variation of the status report also shows you the allocated amounts. This report can be seen in the sales order or invoice as a status button.



· Click on the **Status** button

· Click on the **Save/Refresh** Data 

It will show up the details of customer status

Department

How To **Enter Departments**:

Customer departments can be entered after the initial customer entry

Highlight the **customer**

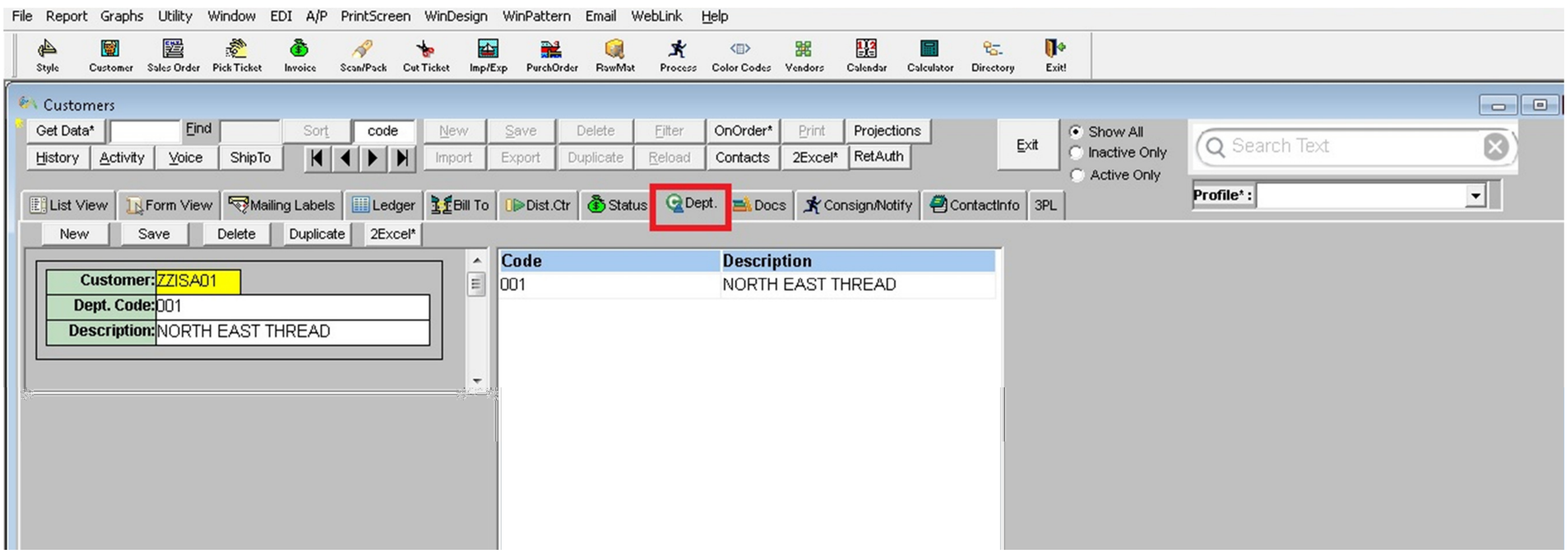
Click on the Department (**Dept.**) tab

Click on the **New** button

Create a **department code** for the customer

Create a description of the department

Click on the **Save** button

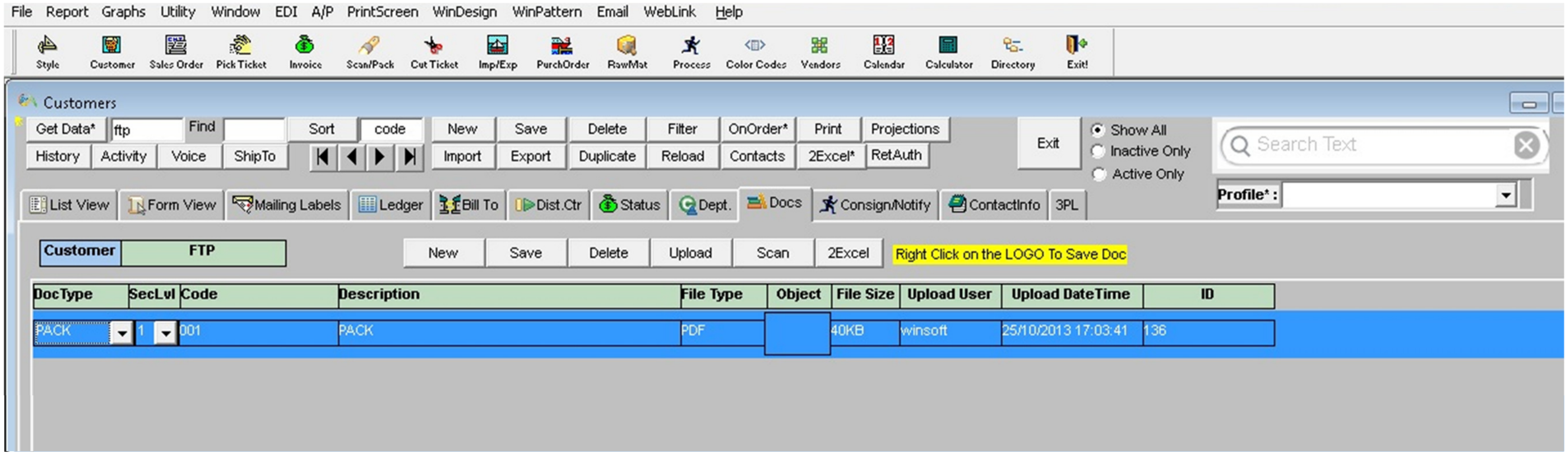


NOTE: Once you save an entry, most things can be edited except the customer code. If you want to change the code of an existing entry, you will need to delete the customer then re-enter the information with the new code. USE THIS FEATURE WITH CARE. IF CHANGES ARE MADE, IT WILL AFFECT ANY ENTRIES RELATED TO THE PREVIOUS CUSTOMER CODE. ALSO, CHANGES CANNOT BE MADE IF THERE IS A HISTORY OF ORDERS ASSOCIATED WITH IT.

Documents

You can upload your **documents** at Docs that are related to your Customers.

- Enter the customer information if you have not done so already
- Highlight the customer that you would like to relate to a distribution center
- Click on **Docs.** Tab
- Click on the **New** button to create a document details
- Enter the necessary information like DocType, Code, Description etc..
- Click on **Upload** Menu
- Browse your file .Jpeg / Word / Excel / PDF format which you need to upload
- Then click on the **Save** button



Consign / Notify

How To Enter **Consign / Notify**:

Customer Consign can be entered after the initial customer entry

Highlight the **customer**

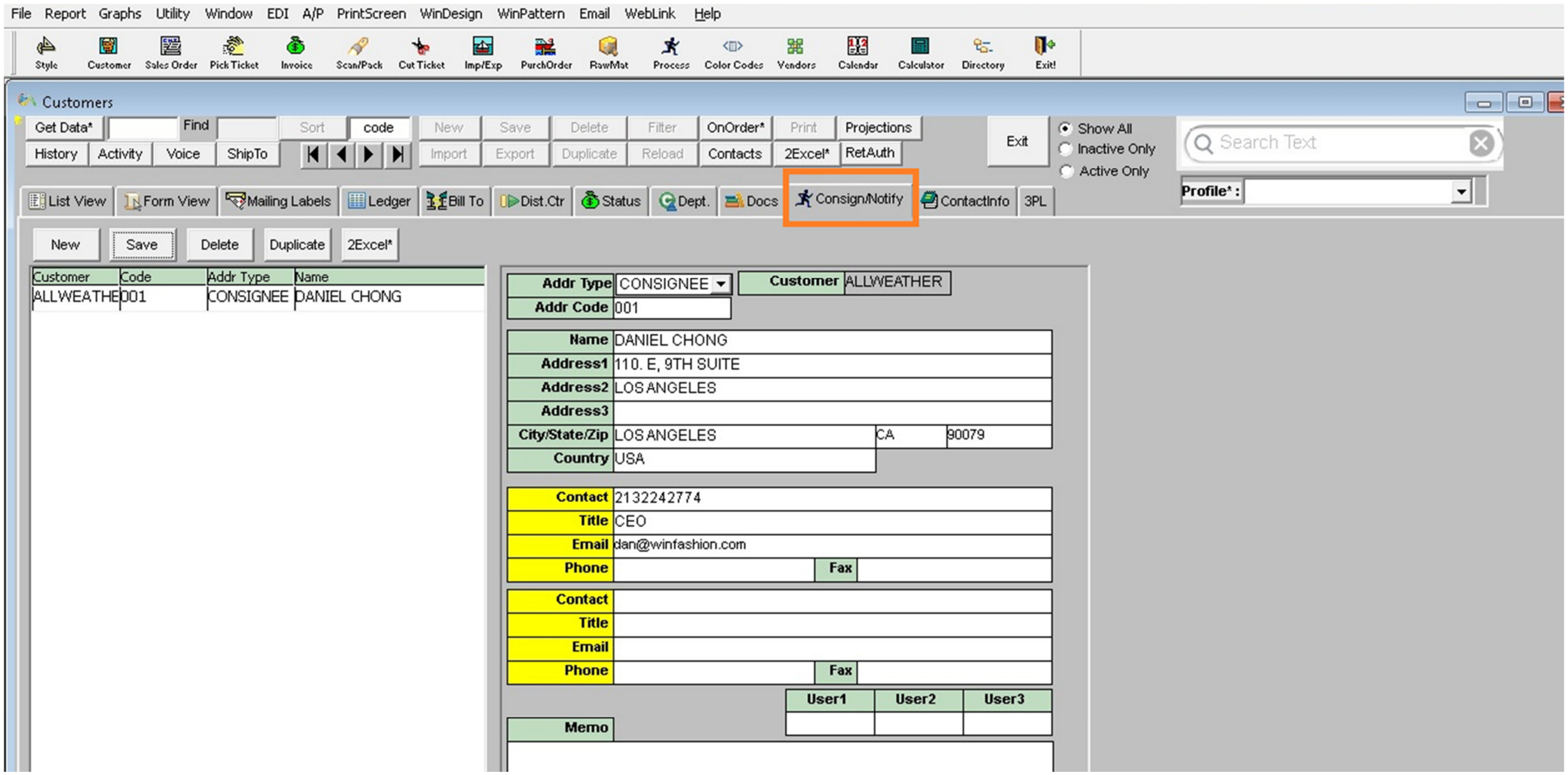
Click on the Department (**Consign/Notify**.) tab

Click on the **New** button

Select Address type as **Consignee / Notify / Agent / Other**

Create an **Address code** for the customer

Enter the necessary information then click on the **Save** button



Contact Info

How To Enter **Contact Info**

Customer Contact Information can be entered after the initial customer entry

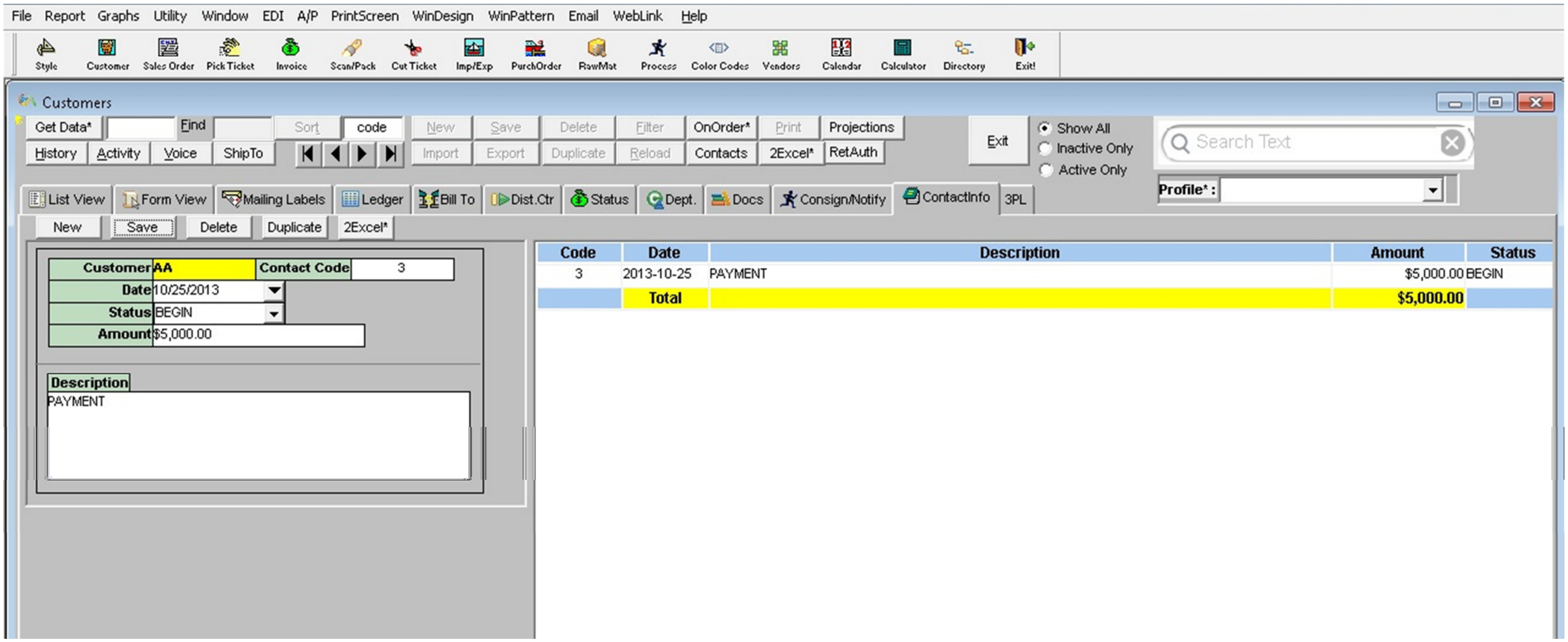
Highlight the **customer**

Click on the Department **Contact Info** tab

Click on the **New** button

Select Status type as **Begin/ Process / Finish**

Enter the necessary information then click on the **Save** button and **Contact Code** will come automatically



3PL -- Third Party Logistics.

How To Enter **3PL**

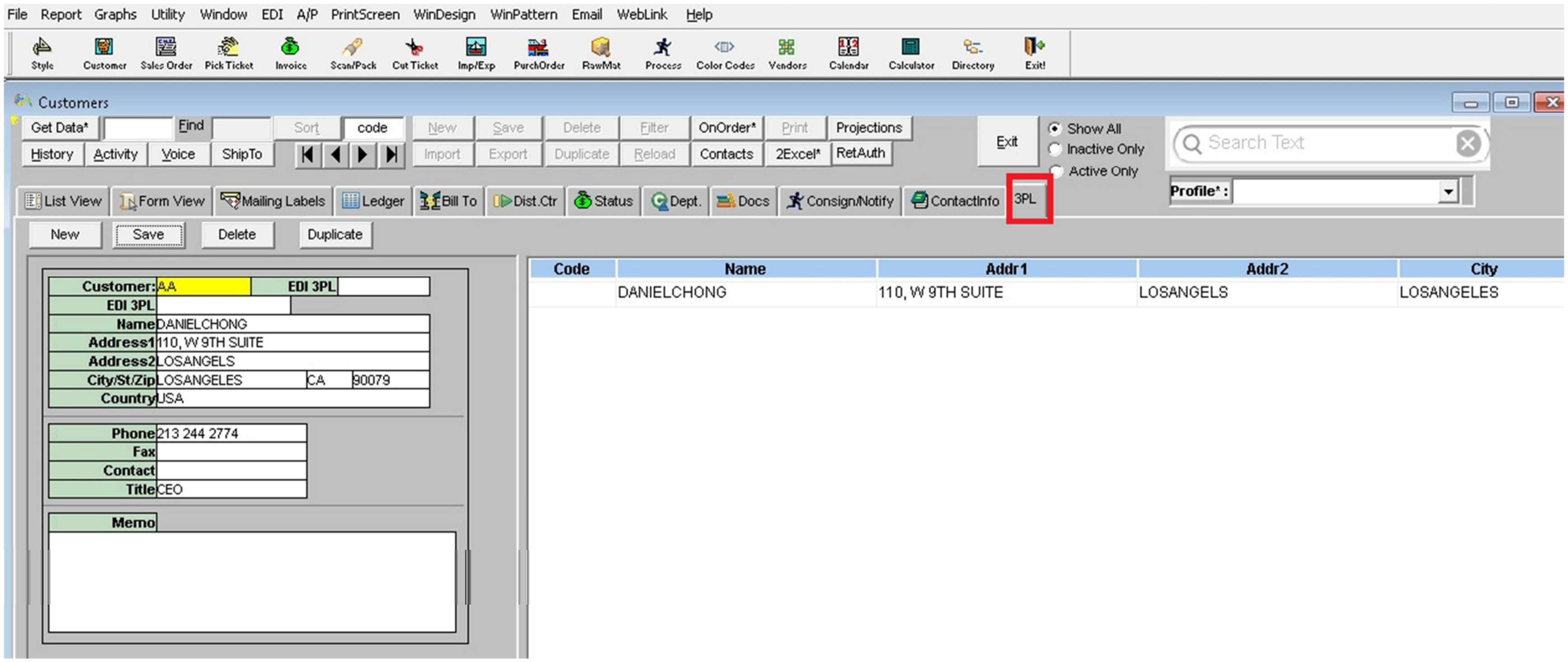
Customer 3PL- Third Party Logistics and it's for EDI Purpose

Highlight the **customer**

Click on the Department **3PL** tab

Click on the **New** button

Enter the necessary information then click on the **Save** button



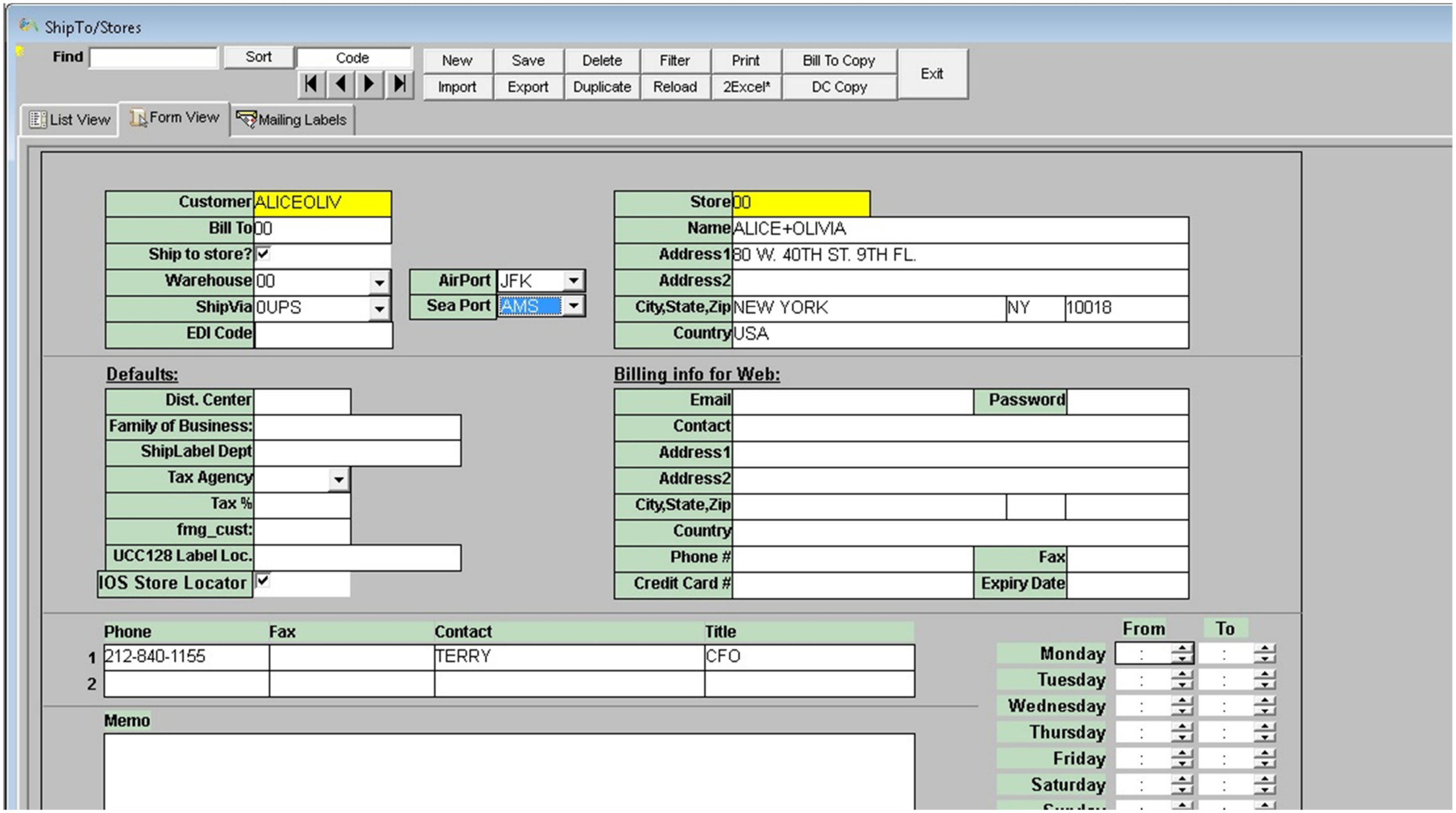
Ship To

This Ship To Button of the customer-handling part of Winfashion handles shipment-related information. The Ship To will keep the store information organized. The Ship To is used in the Sales Order and Invoice.

· If you are not in the customer window, click at the **customer** icon.

- Press the **Ship To** button.
- A **Ship To** list should appear on screen. In this list, you can add several shipping addresses for one customer.
- Click on the **Save button** after inputting the ship to information.
- Select the **Exit button** to return to the Customer window.

NOTE: You need to exit out of the current **Ship To** window to enter a Ship To address for another customer. Keep in mind, the Ship To and the Customer information is kept in separate categories.



Customer Activity Report

The customer activity report can be seen within the Customer portion of Winfashion. This report lists individual customer's orders within a specified time frame.

- Click on Customer of the tool bar
- Click on the **Get Data** button
- Highlight the **desired** customer
- Click on the **Activity** button

Enter the **desired dates** in the boxes provided

- Click on the **OK** button
- If you need to print this report, click on the **Print** button
- To see a summary of the report, click on the **Summary** button
- If you need to go back to the previous screen, click on the **Exit** button

Report Screen

Find | Customer ALICEOLIV To ALICEOLIV | OK | Sort | Filter* | Preview* | Print*

Sort Order | Inv/Order Date 01/01/2013 To 28/10/2013 | Summary | Hide | Export | 2Excel | Exit

Portrait | Landscape | Profile* :

Customer Activity Report

Activity Dates

01/01/13 to 10/28/13

Page 1 of 2
10/28/13
11:29:27 AM

User Id : winsoft

● Customer: ALICEOLIV ALICE+OLIVIA

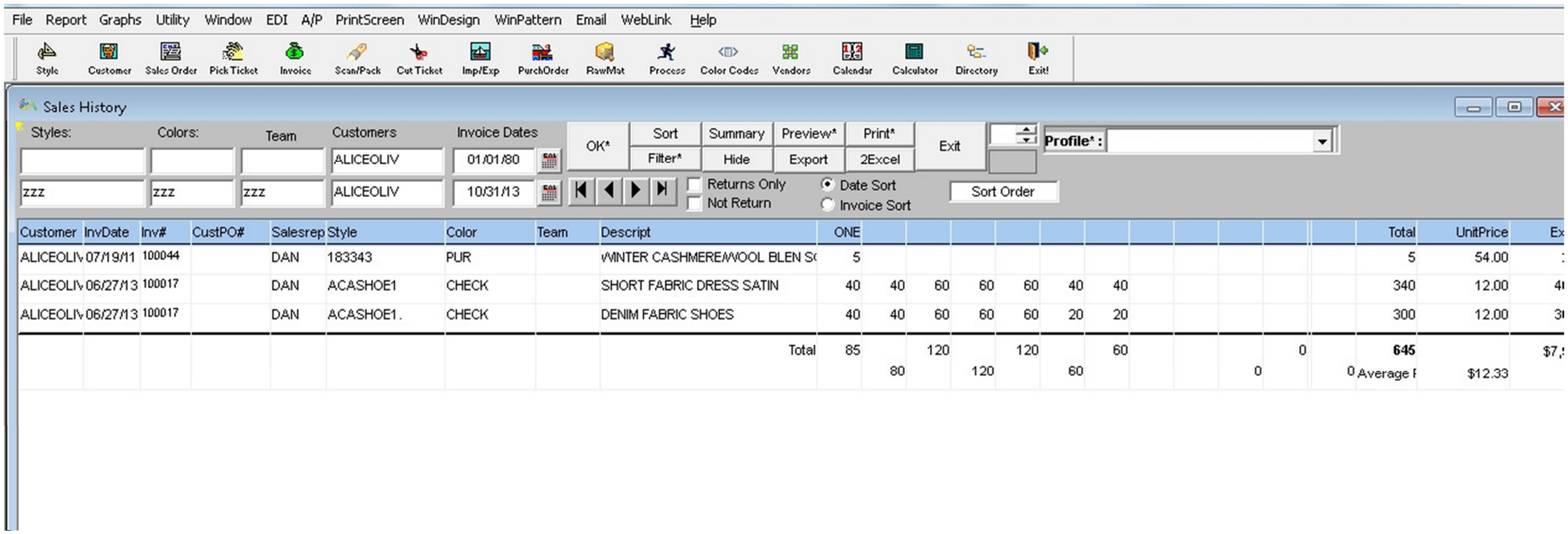
SALES ORDERS

Order#	Style	Color	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6	Qty7	Qty8	Qty9	Qty10	Qty11	Qty12	TotalQty	Price	Ext.Price
Order#:	**10228**	**Customer: ALICEOLIV Store: 00**					**Date 04/13/2013**			**Ship 4/15/13**			**Cancel 04/13/2013**				
28	AG1002	ORANGE	1	1	1	1	2	2	1	1	1	1			12	$81.00	$972.00
		10228 Total:	1	1	1	1	2	2	1	1	1	1			12		$972.00
Order#:	**10552**	**Customer: ALICEOLIV Store: 00**					**Date 07/19/2013**			**Ship 7/19/13**			**Cancel 07/19/2013**				
10552	183343	PUR	1	2	2	1									6	$54.00	$324.00
		10552 Total:	1	2	2	1									6		$324.00
Order#:	**10386**	**Customer: ALICEOLIV Store: 00**					**Date 04/30/2013**			**Ship 4/30/13**			**Cancel 05/03/2013**				
10386	PL1042	NAVY	1	3	2	1									7	$147.00	$1,029.00
		10386 Total:	1	3	2	1									7		$1,029.00
Order#:	**10234**	**Customer: ALICEOLIV Store: 00**					**Date 04/13/2013**			**Ship 4/20/13**			**Cancel 04/21/2013**				
10234	AG1008	DARK BLUE	1	1	2	1	2	1	2						10	$111.00	$1,110.00
		10234 Total:	1	1	2	1	2	1	2						10		$1,110.00
Order#:	**10332**	**Customer: ALICEOLIV Store: 00**					**Date 04/26/2013**			**Ship 6/26/13**			**Cancel 06/26/2013**				
10332	FD1001	BLACK	2	2	2	1									7	$60.00	$420.00
		10332 Total:	2	2	2	1									7		$420.00
Order#:	**10552**	**Customer: ALICEOLIV Store: 00**					**Date 07/19/2013**			**Ship 7/19/13**			**Cancel 07/19/2013**				
10552	1029458-2325	BLACK	1	2	2	1									6	$11.00	$66.00
		10552 Total:	1	2	2	1									6		$66.00
		SALES ORDERS Total	7	11	11	6	4	3	3	1	1	1			48		$3,921.00

Customer History Report

The **Customer History Report** shows individual customer's **sales history** and quantity. This report is useful when you would like to see what you sold to whom and for how much.

- Click on the **Customer** button on the toolbar
- Click on the **Get Data** button to retrieve the style information
- In the **List View**, highlight the customer that you want to see in the report
- Click on the **History** button
- Enter the Invoice Date range under "**Invoice Dates**"
- Enter a Style range under "**Styles:**" If you would like to see all styles within a specified date range, leave the boxes as they are.
- Enter a Color range under "**Colors:**" If you would like to see all colors within a specified date range, leave the boxes as they are.
- Click on the **OK** button
- If you want to print this report, click on the **Print** button
- To see a summary of the report, click on the **Summary** button
- If you want to exit and return to the style master, click on the **Exit** button



Customer on Order Report

This report can be seen within the Customer portion of Winfashion. This report lists customer's orders and invoice information including any shipped quantity.

- Go to Customer on the tool bar
- Click on the **Get Data** button
- Highlight the **desired** Customer
- Click on the **OnOrder** button
- Enter the invoice date range that you want to see

- Enter a style range by entering a style code in the top box then a style code in the bottom box. If you would like to see all styles in a specified date range, leave the boxes as they are.
- Enter a color range by entering a color code in the top box then enter a color code in the bottom box. If you would like to see all the colors in a specified date range, leave the boxes as they are.
- Click on the **OK** button
- If you want to print this report, click on the **Print** button
- To see a summary of the report, click on the **Summary** button
- To exit this report, click on the **Exit** button

File Report Graphs Utility Window EDI A/P PrintScreen WinDesign WinPattern Email WebLink Help

Style | Customer | Sales Order | Pick Ticket | Invoice | Scan/Pack | Cut Ticket | Imp/Exp | PurchOrder | RawMat | Process | Color Codes | Vendors | Calendar | Calculator | Directory | Exit!

Open Sales Lookup by Customer

Customer AMER961 Style: Color: Team OK Filter Sort Print Export Exit

Orderno	Customer	Customer Name	Store	Custpo	Order	Ship	Cancel	Style	Color	Team	WH	PrePack	Ordered	Shipped	Alloc	Pick	Balance	Cls	Price	Ext Price	Ext Pr
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	AG1038	HUMMING BIRD		00		14				14	N	$148.0(	$2,072.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	AG1039	WHITE		00		13				13	N	$90.00	$1,170.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	FD1001	BROWN		00		14				14	N	$60.00	$840.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	JD1027	BLACK		00		12				12	N	$72.00	$864.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	JD1029	BLUE		00		12				12	N	$68.00	$816.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	JD1035	BLACK		00		12				12	N	$72.00	$864.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	PL1009	LIGHT GREY		00		13				13	N	$170.0(	$2,210.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	PL1010	WHITE		00		10				10	N	$204.0(	$2,040.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	PL1011	ARMY GREEN		00		11				11	N	$193.0(	$2,123.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	PL1012	WHITE		00		13				13	N	$147.0(	$1,911.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	PL1035	BLACK		00		11				11	N	$1,022.	$11,242.00	
10245	AMER961	AMERIPRID	00		4/15/13	4/17/13	4/17/13	AG1037	SOL		00		12				12	N	$90.00	$1,080.00	
									Total:				147				147			$27,232.00	

10245 10 AMER961 AMERIPRID 00 4/15/13 4/17/13 04/17/13 Open $148.00

Style		XS	S	M	L	Totals	WH: 00	ActCost
AG1038	Ordered	2	4	5	3	14	$2,072.00	$0.00
Color	Shipped							GP%
HUMMING BIRI	Allocated							100.00%
Team	Picked							
	Balance	2	4	5	3	14	$2,072.00	