

Setting Up Customer Types, Customer Selection Codes and Sales Report Categories

Customer Types and Selection Codes

Customers may be divided into groups based on their type of business or some other criteria. Each "group" is assigned a set of codes. These codes are useful for categorizing customers for reports or marketing purposes. Customer Selection codes differ from Customer Types in that you cannot get sales history for selection codes and the selections are only 2 digits in size where customer types are 3 digits. Nine such groups are available for Customer Types. Customer Selection Codes has twenty possible groups.

Go to the system options for Reference Information (Reference Information – System Options – Reference Information) to define how many groups you want to use. On this screen all you have to do is decide how many Customer Types and Selection Code positions or groups you will use.

Reference Information System Options

Sales Report Categories used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

Customer Types used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

Prospect types defined the same as Customer Types?

Customer/Prospect Selection Codes used: 1: 2: 3: 4: 5: 6: 7: 8: 9: 10:

11: 12: 13: 14: 15: 16: 17: 18: 19: 20:

Vendor Selection Codes used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

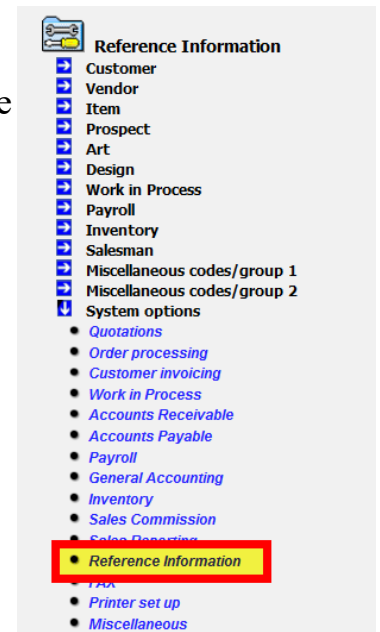
Inventory Types used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

Item flag descriptions:

1: Flag #1

2: Flag #2

3: ABCDEFGHIJKM



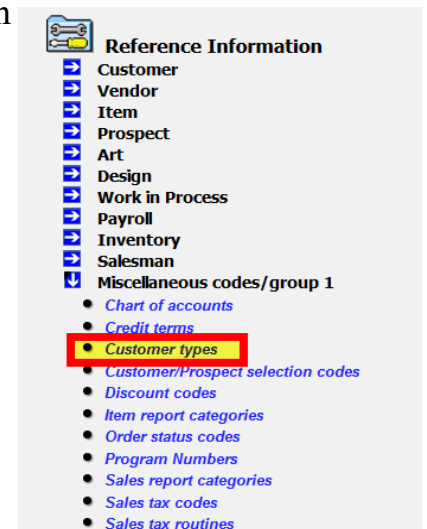
To set up the actual Customer Types, go to: Reference Information – Miscellaneous Codes/group 1 – Customer Types. Select the position (group) that you are setting up and enter three digit number, enter the description and click “Save”.

Customer Types

Position: 1st position

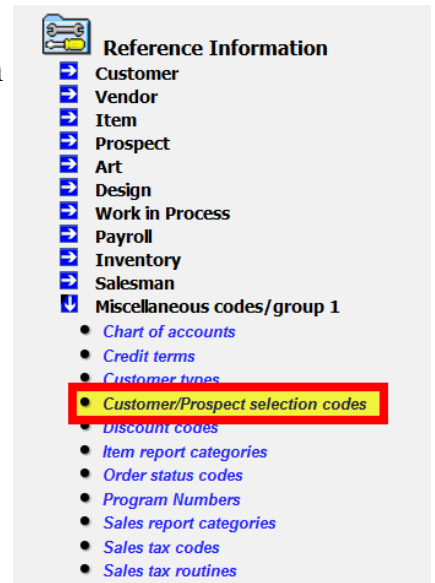
Customer Type: 011

Description: SCHOOLS



Setting Up Customer Types, Customer Selection Codes and Sales Report Categories

To set up the actual Customer Selection Codes, go to: Reference Information – Miscellaneous Codes/group 1 – Customer Selection Codes. Select the position (group) that you are setting up and enter three digit number, enter the description and click “Save”.



Customer/Prospect Selection Codes

Position: 2nd Position

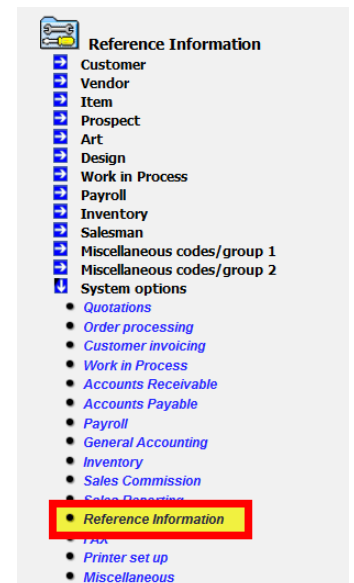
Selection Code: 01

Description: Email only marketing

Sales Report Categories

Sales Report Categories are set up the same way as the Customer Types and Selection Codes. You can define up to nine separate sets of report codes to categorize your sales for sales analysis and to select order and invoice data for reports. These apply to the order or invoice as a whole.

Go to the system options for Reference Information to define how many groups you want to use (Reference Information – System Options – Reference Information). On this screen, all you have to do is determine how many Sales Report Category Positions you want to have.



Reference Information System Options

Sales Report Categories used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

Customer Types used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

Prospect types defined the same as Customer Types?

Customer/Prospect Selection Codes used: 1: 2: 3: 4: 5: 6: 7: 8: 9: 10:

11: 12: 13: 14: 15: 16: 17: 18: 19: 20:

Vendor Selection Codes used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

Inventory Types used: 1: 2: 3: 4: 5: 6: 7: 8: 9:

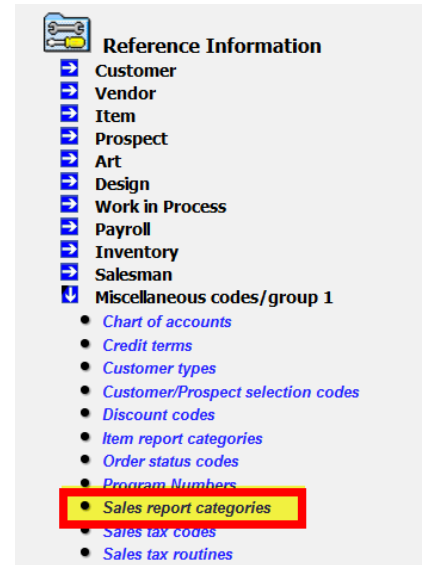
Item flag descriptions: 1: Flag #1
2: Flag #2
3: ABCDEFGHIJKM

Setting Up Customer Types, Customer Selection Codes and Sales Report Categories

To set up the actual Sales Report Categories go to Reference Information – Miscellaneous Codes/group 1 – Sales Report Categories. Select the position and then enter a three digit number for the Code, then enter the description. Once done, click “Save”.

Sales Report Categories

Position:	1st position
Sales Report Category Code:	006
Description:	AWARDS



Reference Information

- Customer
- Vendor
- Item
- Prospect
- Art
- Design
- Work in Process
- Payroll
- Inventory
- Salesman
- Miscellaneous codes/group 1
 - Chart of accounts
 - Credit terms
 - Customer types
 - Customer/Prospect selection codes
 - Discount codes
 - Item report categories
 - Order status codes
 - Program Numbers
 - Sales report categories**
 - Sales tax codes
 - Sales tax routines