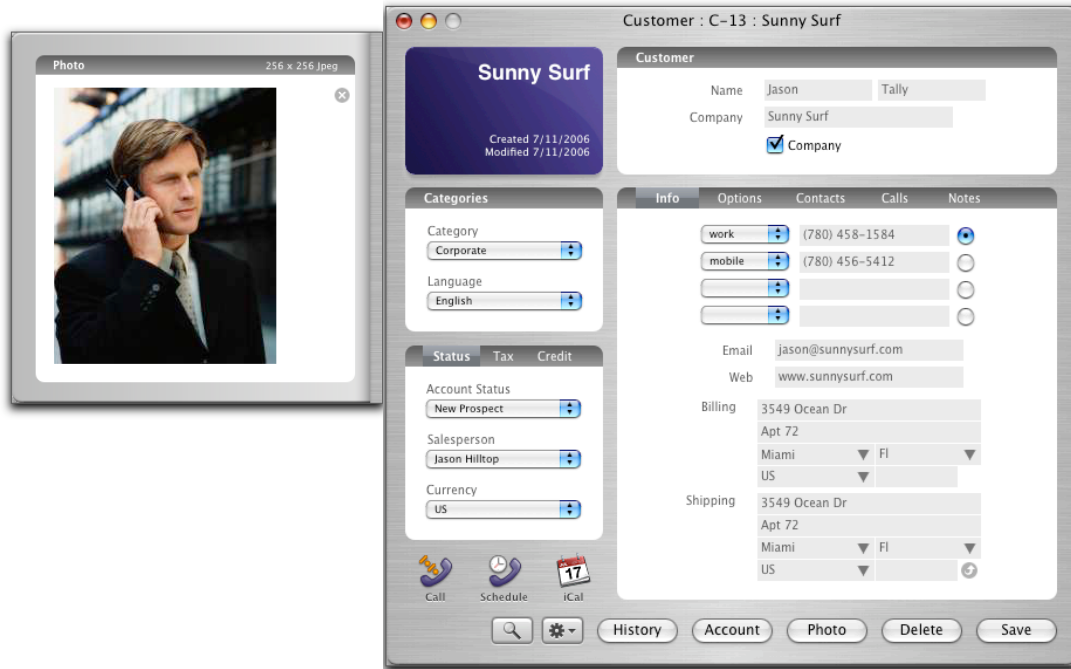


Customers

Customer Window

The Customer window lets you create a record for one of your Customers in your LightSpeed database, defining all of the properties that determine how this Customer is handled throughout the system.



Customer Section

The Customer Section is where one enters the First Name, Last Name and Company Name of the Customer. If the Customer is primarily a Company, check the Company checkbox.

Account Tab

Status

The Account Status popup menu allows one to set the status of a Customer's account, like 'Lead', 'Active' or 'Credit Hold'. Account Statuses can be set up in the Account Status Setup panel.

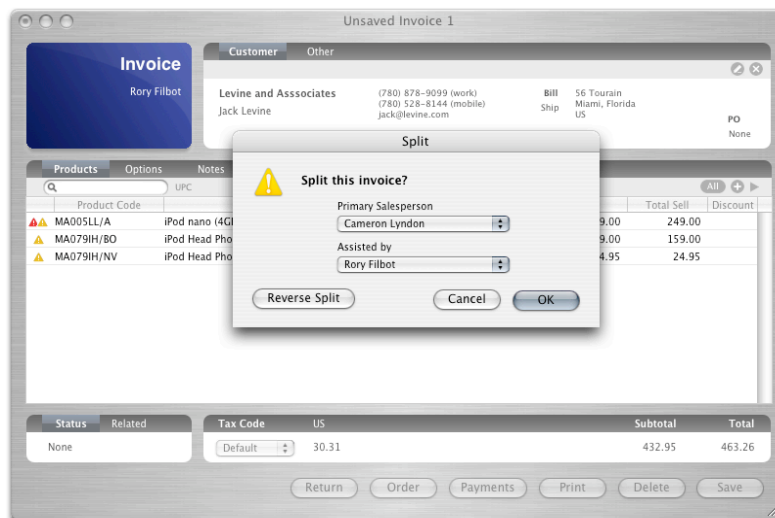
Category

The Category popup menu allows one to select a category for Customers who may receive a particular discount or Pricing Level. Categories can be assigned discounts and Pricing Levels in the Customer Categories Setup panel.

Example: A company that has Customers in the education market may create a Category called 'Education' that may receive an automatic discount or be assigned an 'Education' Pricing Level. Products that have special pricing for 'Education' Customers will enter their selling price in the Pricing Levels section of the Options tab of the Product window of a Product. (see chapter on *Getting Started*)

Salesperson

One can assign a User to a Customer by selecting the User on the Salesperson popup menu. When someone tries to invoice a Customer that 'belongs' to another Salesperson, a dialog will ask whether the invoice should be set up as a split between the two Users.



Profile Tab

Referred By

Referred By allows you to choose from a user-customized list of referral sources.

Birthday

The Birthday field allows you to record your Customer's birthday.

Prefs Tab

Language

LightSpeed can print Quotes, Orders, SROs, Invoices and POs in English, French and Spanish. If a Customer has a language preference for the sales documents they receive, select the Language from this popup menu. You can edit any of the language translations on the sales documents in the Field Translations Setup panel.

Currency

If a Customer pays in a particular currency this currency can be selected from the Currency popup menu. When added to a sales document, the currency will be set to the currency set for the Customer.

Tax Tab*Tax Code*

The Tax Code popup menu allows one to set the Tax Code that should automatically be set when adding this Customer to a sales document. Tax Codes specify which taxes and which rates are charged in a particular jurisdiction or circumstance. Tax Codes are set up in the Taxes Setup panel.

Example: A Customer whose purchases are always shipped to another state where a particular tax must be charged might have their Tax Code set to the Tax Code that will be applied.

Tax Status

If a Customer is entitled to certain tax exemptions, one can apply the corresponding Tax Status. Tax Statuses are set up in the Taxes Setup panel.

Example: If Customers who are registered businesses do not pay a certain state tax, a Tax Status can be set up and applied to automate this exemption for those Customers.

Credit Tab*Terms*

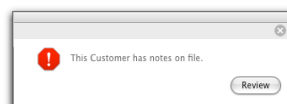
The Terms popup menu allows one to set the terms of payment for a Customer, like 'COD' or 'Net 30'. Terms can be set up in the Terms Setup panel.

Credit Limit

Enter the Customer's credit limit here. When their limit is surpassed, the User will receive a warning.

Credit Hold

If the Customer has been put on credit hold, check the Credit Hold checkbox. When this Customer is assigned to a sales document, a warning window will appear which will inform the User the Customer is on credit hold when it is opened.



Info Tab

Phone Numbers

Up to four phone numbers can be entered in the Phone Numbers section. Phone Numbers are auto-formatted when one tabs out of the field.

The Phone Number Type popup menu lets one set the type of the Phone Number, like 'work', 'home', 'mobile', etc.

The radio button beside each Phone Number allows one to set the preferred number for contacting this Customer.

Email and Web

The Email and Web fields allow one to store email addresses and web page addresses for a Customer. Clicking the 'Email' or 'Web' labels will open the address with your default email application or web browser.

Addresses

The Billing and Shipping Addresses for the Customer can be entered in the Address area. A two-line address, City, State/Province, Country and Zip/Postal Code can be entered for each.

Select arrows on the City, State/Province, and Country fields allow you to select an item from pre-defined lists, which can be set up in the City, State/Province, and Country Setup panels. Clicking the Plus icon allows you to add a new item on the fly.

Options Tab

All Customer Custom Fields set up in the Custom Fields setup panel show up in the Options Tab. Custom Fields can be created as Text or Date fields.

Example: You could create a checkbox field called Kids to record the names of the Customer's children.

Contacts Tab

The Contacts Tab lists all Contacts entered for this Customer. Multiple Contacts can be used to track information about different people at a company and store multiple addresses associated with those Contacts.

The screenshot shows a mobile application interface for editing a contact. The contact is Peter Dickson, an Accountant in the Finance department. He has a work phone number of (780) 978-9984 and an email address of peter@toysrme.com. His alternate address is 1470 Pickering, Chicago, IL, US, with zip code 48589. The form has 'Close' and 'Save' buttons at the bottom.

When a Customer with multiple Contacts is added to a sales document, a Select arrow appears from which you can select one of the Contacts. If the Contact has an associated address, a dialog box will ask whether you would like to use the alternate address as the Billing or Shipping Address on the sales document.

Adding a New Contact

Click the New button to enter a new Contact on the Contacts drawer. All Customer Contact Custom Fields set up in the Custom Fields setup panel show up in the Options Tab of the Contacts drawer. Custom Fields can be created as Text or Date fields.

Editing and Deleting a Contact

To edit a Contact, double-click the Contact in the Contacts list or select the Contact and click the Edit button. To delete a Contact, select the Contact and click the Delete button.

Importing Contacts

Contacts can be imported into LightSpeed using Import Customer Contacts in LightSpeed Import Tools. More details can be found in the Import Tools chapter of the manual.

Calls Tab

The Calls Tab lists all of the Calls that you have logged with this Customer.

Adding a New Call

Click the New button to enter a new Call on the Calls drawer.

Marking a Call for Follow Up

You can mark a Call for Follow Up by checking the Follow Up checkbox and assigning a User to the Follow Up by selecting a User from the popup menu that appears when clicking the User shown. Calls marked for Follow Up appear in the Tracker if set up to show Calls marked for Follow Up.

Editing and Deleting a Call

To edit a Call, double-click the Call in the Call list or select the Call and click the Edit button. To delete a Call, select the Call and click the Delete button.

Notes Tab

The Notes Tab lists all of the Notes that you have entered for this Customer. If a Customer has notes on file, a pop-up window will appear anytime that Customer is added to a sales document.

Adding a New Note

Click the New button to enter a new Note on the Notes drawer.

Marking a Note for Follow Up

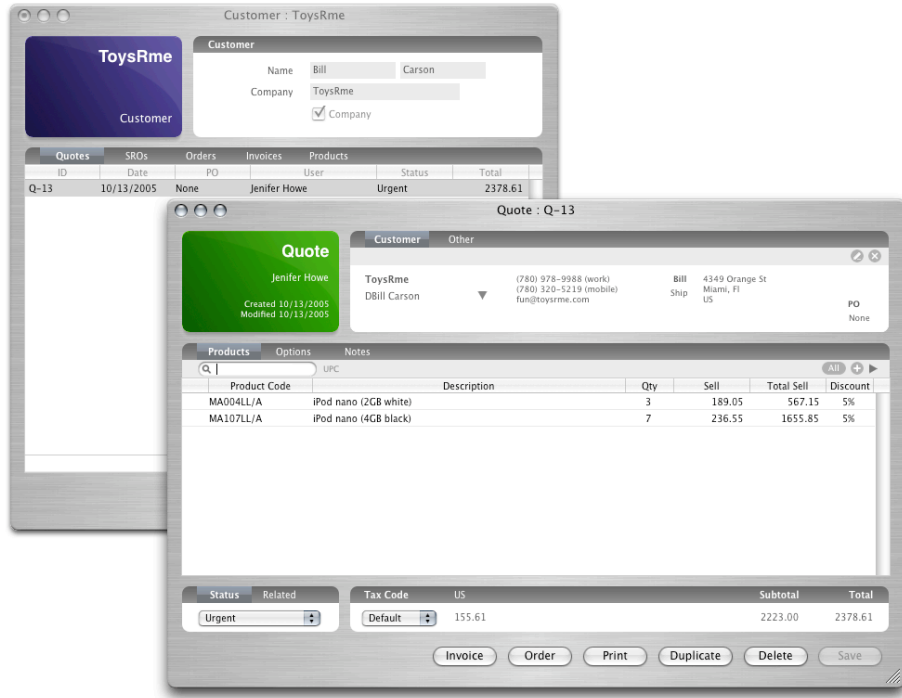
You can mark a Note for Follow Up by checking the Follow Up checkbox and assigning a User to the Follow Up by selecting a User from the popup menu that appears when clicking the User shown. Notes marked for Follow Up appear in the Tracker if set up to show Notes marked for Follow Up.

Editing and Deleting a Note

To edit a Note, double-click the Note in the Note list or select the Note and click the Edit button. To delete a Note, select the Note and click the Delete button.

History Section

The History Section appears when one clicks the History button. The History Section lists all sales documents (Quotes, SROs, Orders, Invoices) ever saved for this Customer in addition to all of the Products ever sold to this Customer. Double-clicking a sales document will open it.



Account

Clicking the Account button will bring up the Accounts Receivable window for this Customer.

Photo

LightSpeed can store 256 x 256 pixel JPEG photos of your Customers. Drag a JPEG file to the Photo drawer, opened by clicking the Photo button, and the photo will be scaled and saved to the database. To remove the photo, click the 'X' button.

Call Button

LightSpeed can place a call to the default Phone Number on the OpenBase VoIP phone system (required) by clicking the Call button.

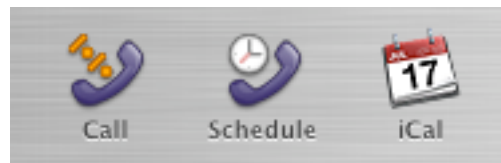
Your OpenBase VoIP phone extension can be associated to your Mac OS X workstation by configuring the DialerSetup utility found in the Utilities folder of the OpenBase folder in the Applications folder.

Schedule Call Button

LightSpeed can schedule a call to the default Phone Number on the OpenBase VoIP phone system (required) by clicking the Schedule Call button and choosing a date and time at which the call should be placed. When the date and time arrives, your phone will ring, and when picked up, the outgoing call will be placed.

iCal Button

LightSpeed can schedule an appointment with a Customer by clicking the iCal button. When the Schedule iCal Event sheet opens, select the iCal calendar you would like to book your appointment in as well as specify the date, time and any notes.



Find Customer

The magnifying glass icon calls up a search window that allows you to search for Customers and switch to their profile when the name is double-clicked.

Toolbox

The Toolbox menu (accessed with the gear icon) allows you a variety of functions, including printing customer labels and mapping their address.

Send Email

Allows you to paste the Customer's email directly into your default email application.

Visit Homepage

Accesses the URL pasted into the Web field of the Customer profile.

Map Billing and Shipping Addresses

The Map Address features will call up Google Maps and show you the location of the Customer's billing or shipping address.

Directions to Billing and Shipping Addresses

Using the Directions to Address features will map the directions from your address (set in the Company Info setup) to the Customer's billing or shipping address using Google Maps.

Schedule in iCal

Functions the same way as the iCal button.

Print Label

The Print Label feature will allow you to print Customers' billing or shipping address labels on a roll-type label printer or on a sheet of labels with your laser printer. Choose the label size using the Label Size pull-down menu.

New Sales Document

Using the Toolbox menu, you can create new sales documents directly which include all the Customer info.

Deleting Customers

Authorized users can delete customers by clicking the Delete button. Deleting a Customer does not remove it from sales documents where it has been used but does remove all history for the Customer.

Import Customers

Customers can be imported into LightSpeed using Import Customers in LightSpeed Import Tools. More details can be found in the Import Tools chapter of the manual.