



Customers & Accounts

This system can be used to enter customer information and keep it on file. The Customer information can be used to set up pre-paid, house, and offsite sales accounts. The customer information can also be used for future orders and the delivery function.

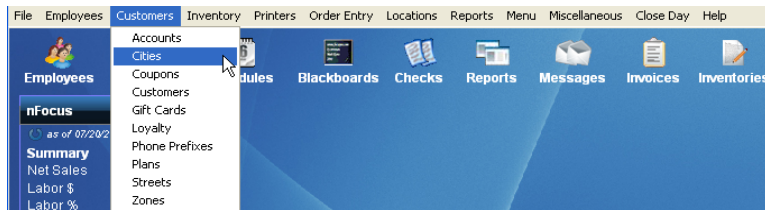
Before adding customers to the system, set up defaults for your area. Defaults are not required, but facilitate quicker and more accurate entry of customer information.

1. Cities
2. Zones
3. Streets
4. Phone Prefixes
5. Entering customers using the back office application
6. Entering customers at the register

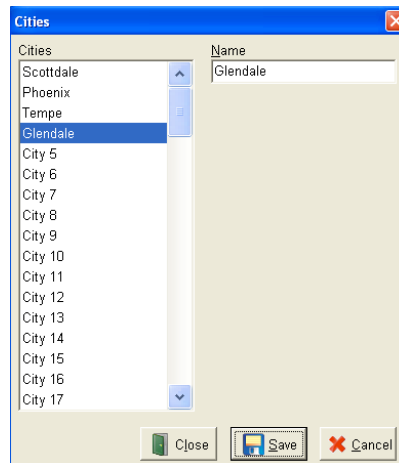
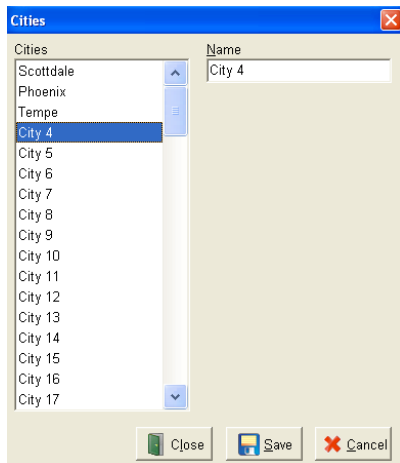
Cities

One hundred cities can be established. Once cities are added they can be linked to phone prefixes, states, zip codes, and zones.

1. select cities from the customers drop-down list



2. highlight a line that is not being used
3. enter city name
4. select save and close

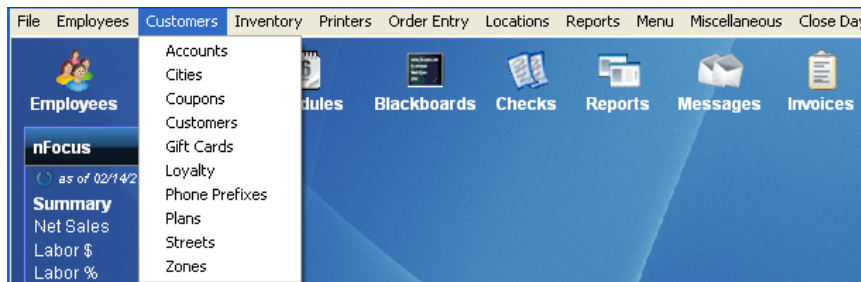




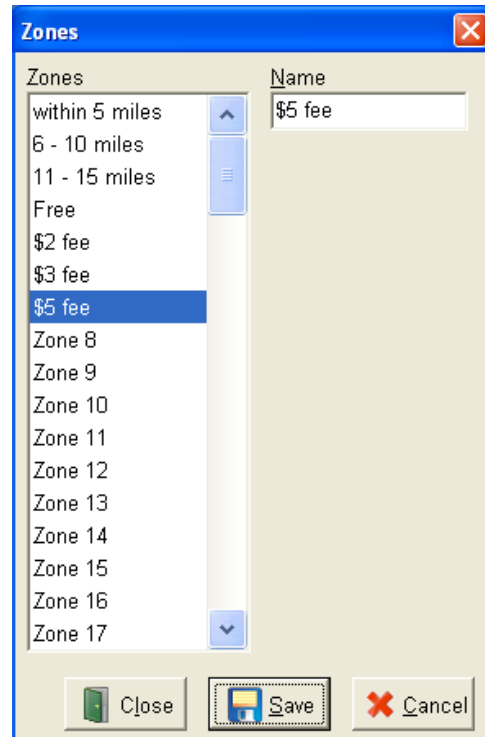
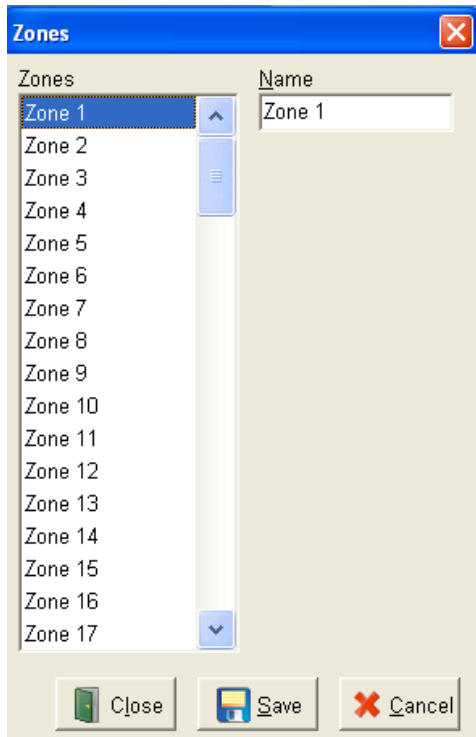
Zones

One hundred zones can be established. Once zones are added they can be linked to phone prefixes, cities, states, and zip codes. Zones are used for delivery. Zones can be set numerically, by distance, by town, or as fees.

1. select zones from the customers drop-down list



2. highlight a line that is not being used
3. enter zones
4. select save and close

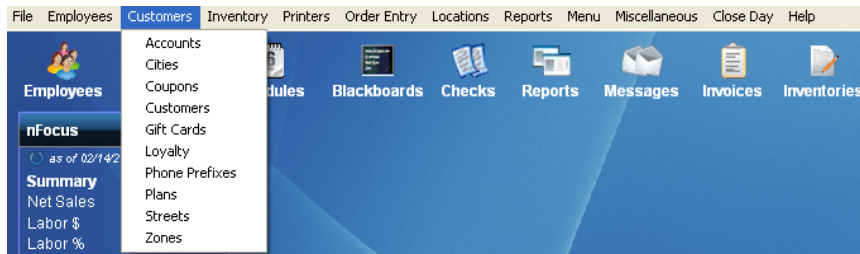




Streets

One hundred streets can be established. Once zones are added they can be linked to phone prefixes, cities, states, and zip codes. Zones are used for delivery. Zones can be set numerically, by distance, by town, or as fees.

1. select streets from the customers drop-down list



2. select add

The screenshot shows the 'Streets' dialog box. On the left, there is a list of streets with 'Street 1' selected. On the right, there are input fields for: Name, Minimum Address (0), Maximum Address (9999), City (Scottdale), State (AZ), Zip Code, Delivery Zone (within 5 miles), Address 2, and Directions. At the bottom, there are buttons for Close, Save, Add, Delete, Import, and Cancel.



3. enter street names to associate with delivery zones
4. enter minimum and maximum address numbers
5. adjust default city and state if needed
6. enter zip code
7. select delivery zone
8. enter address 2 field if necessary
9. enter comments if necessary

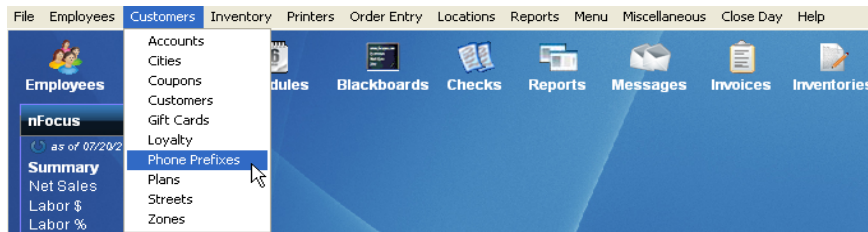
Tip: Streets can be imported from the customer information; enter the address when adding customers then go to streets and select import; select a zone for each street, then select import



Phone Prefixes

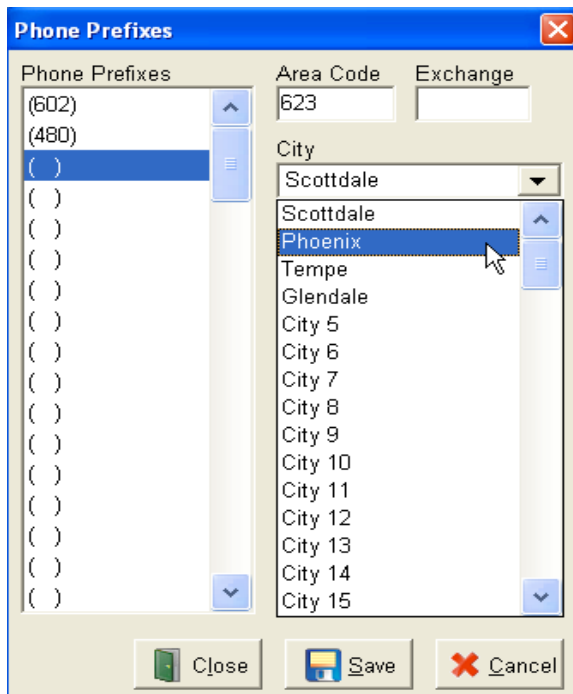
The city, state, zip code and delivery zone can be associated with each phone prefix. The first eight phone prefixes will be displayed on the customer search window.

1. select phone prefixes from the customers drop-down list



2. highlight a blank field
3. enter prefix in area code field
4. select city and state from the drop-down lists

note: the cities listed are the ones that you built in the cities section





5. if delivery, select zone from drop-down list

A screenshot of a software dialog box titled "Phone Prefixes". The dialog has a blue title bar with a close button. It contains several input fields and a list. On the left, a list of phone prefixes is shown, with "(480)" selected. To the right of this list are up, down, and menu buttons. Further right are fields for "Area Code" (containing "480"), "Exchange" (empty), "City" (containing "Scottsdale"), "State" (containing "AZ"), and "Zip Code" (empty). Below these is a "Zone" dropdown menu currently set to "<None>". A scrollable list of zone options is visible below the dropdown, including "within 5 miles", "6 - 10 miles", "11 - 15 miles", "Free", "\$2 fee", "\$3 fee", "\$5 fee", "Zone 8", "Zone 9", "Zone 10", "Zone 11", "Zone 12", and "Zone 13". At the bottom left of the dialog is a "Close" button with a green icon.

6. select save
7. select close

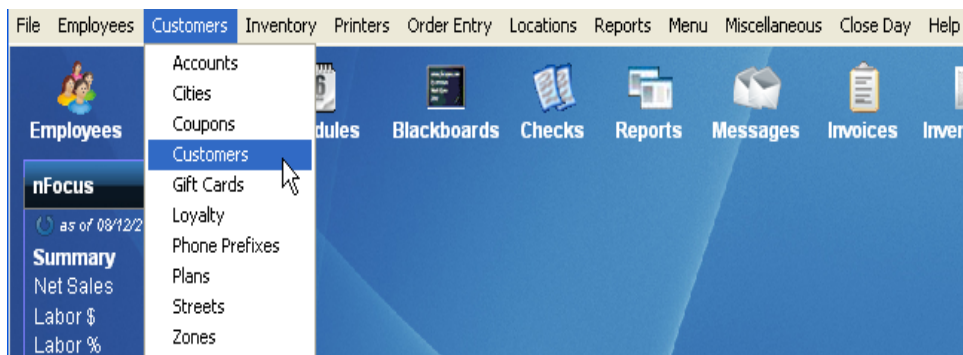


Customers

Customers can be added using the back office program or the register program while helping customers. If entering customers at the time of an order connect a keyboard to the register. This will speed up the customer data entry.

Back Office

1. select customers from the customer drop-down list



2. select add
3. enter customer information

Customers (3)

Corp, Kahala

Customer, Mike

JONES, DAVE

First Name: Kahala

Last Name: Corp

Phone #: () -

Account #:

Picture File Name:

Address: 9311 East Via de Ventura

Apt/Suite:

City: Scottsdale

State: AZ

Zip Code: 85258

Delivery Zone: Zone 3

Delivery Instructions:

Phone #2: () -

Fax #: () -

Comments:

☐ Do Not Deliver ☒ Allow Charge ☐ Returned Mail

☐ Bad Check ☐ VIP ☐ Require Approval

E-mail Address:

Company:

Birth Date: / /

Anniv. Date: / /

Charge Limit: \$0.00

Balance: \$0.00

Loyalty Plans

1. ☐ Plan1 3. ☐ Plan3

2. ☐ Plan2 4. ☐ Plan4

Close Save Add Delete Find Tools Loyalty Cancel



4. account # can be set to a phone number, last name, etc.
 - a. NrGize locations enter health club card number for the account #
5. select city and state from the preset drop-down list
6. set delivery zone if using delivery
7. select allow charge if setting up house accounts
8. enter a charge limit if setting up house accounts

9. enter any additional information
10. select save
 - a. customer is now added
11. select close



Register

1. touch customers from function bar
2. enter search criteria
 - a. the help desk can help you set default search methods
3. touch ok

A screenshot of the "Customer Search" screen. At the top, it says "Customer Search" with a small icon. Below that, "Search Method:" is followed by four radio buttons: "Phone #", "Company", "Last Name", and "Account #". Underneath, "Match:" is followed by three radio buttons: "Begins With", "Contains", and "Exact Only". On the left, there is a list of search results with numbers 1 through 8. The first three entries are: 1. (480), 2. (602), and 3. (623). To the right of this list is a "Search" input field containing the number "4803624800". Below the input field is a numeric keypad with buttons for digits 1-9, 0, and a backspace key (<). There are also "OK" and "Cancel" buttons. A small icon of a keyboard is visible in the bottom right corner.

4. touch yes for new customer

A screenshot of a "Confirm" dialog box. The title bar says "Confirm" and has a yellow status indicator "(163)". The main text says "Customer not found. New customer?". On the left is a large question mark icon. At the bottom, there are two buttons: "Yes" with a green checkmark icon and "No" with a red X icon.



5. complete customer information
 - a. entering customer information can be done by connecting a keyboard or opening the on-screen keyboard

A screenshot of the "Edit Customer" form in a mobile application. The form has a blue background and white text. It includes fields for Phone #, Account #, First Name, Last Name, Address 1, City, State, Zip Code, Comments, E-mail Address, and Company. The Phone # field is pre-filled with "(480) -". The Account # field is empty. The City dropdown is set to "Scottsdale" and the State dropdown is set to "AZ". The Zip Code field is empty. The Comments, E-mail Address, and Company fields are empty. At the bottom of the form, there are three buttons: "Start Order" (with a keyboard icon), "Cancel" (with a red X icon), and a keyboard icon. A red arrow points from a text box to the keyboard icon button. The text box contains the instruction: "Touch keyboard icon to open on-screen keyboard".

Edit Customer

Phone # Account #
(480) - [Account # field]

First Name Last Name
[First Name field] [Last Name field]

Address 1
[Address 1 field]

City State Zip Code
Scottsdale AZ [Zip Code field]

Comments
[Comments field]

E-mail Address
[E-mail Address field]

Company
[Company field]

Touch keyboard icon to open on-screen keyboard

Start Order Cancel [Keyboard icon]

- b. account # can be set to a phone number, last name, etc.
 - c. NrGize locations enter health club card number for the account #
 - d. select city and state from the preset drop-down list
 - e. enter any additional information
6. touch start order
 - a. the customer is now added
7. ring item(s)
 - a. any item that is rung in and tendered will be linked to the customer account