Customer History Window

Understanding the Customer History Window

The customer history window is where all your customers and their orders, past and present are stored. This is a great window and you can do a lot with it.

1. Click on the Customer History window button at the top of your toolbar.
2. The top portion of the window lists your customer names and addresses. This is where you can add,edit or delete customers by using the buttons on the right.
3. To quickly locate a customer type the customer last name in the “Enter Customer Last Name” field at the top of the window. You can change the sort order and then enter a Company Name to search on.
4. Tab out of the search field and the software will highlight the customer name. If a customer is not found, it will highlight the next closest match.
5. The lower left portion displays a box which lists all the invoices for the customer. An invoice can have multiple work orders attached to it, and these work orders are displayed in the larger box/area to the right of the invoice box.
6. When you highlight an invoice on the left, you will see the work orders displayed on the left.
7. Work order details which are displayed on the screen are: Work Order number, Completed Status, Pickup Status, Due Date, Image Description, Work Order total, and Amount Due. (Some of these are not available in the Express version).
8. You can change the status of orders using the Change Work Order status buttons on the bottom left. (This is not available in the Express version).
9. You can also use the Accept Payment button at the bottom left to receive and record payments to any customer with a balance. (This is not available in the Express version).
10. If you want to print a work order, invoice or statement, you can use the Print Action List (you can also select Accept Payment from here too).
11. Along the right side of the work order section there are a 3 buttons:
    Delete Invoice & Work Orders: Use this button only if you want to delete both the invoice and any attached work orders. Keep in mind if there are any payments which had been taken on the orders, then you cannot delete the work order or invoice.

    Edit or Add Work Orders **to Selected Invoice**: Use this button if you have to add a work order onto a specific invoice which had already been saved. This button will take you into the work order entry window, but through a different process so make sure to read the section titled: Edit or Add Work Orders to Existing Invoice.

    Add New Invoice & Work Order: This button will add a new work order and invoice, however it is not recommended to use this button. The reason as odd as it may seem is because it is much easier and quicker to add an order using the Add Work Order button along the top tool bar. This button was one of the original features in ezFramer and as functionality has changed we decided to leave the button in for those who at the time requested the button. This will probably be removed in the future.

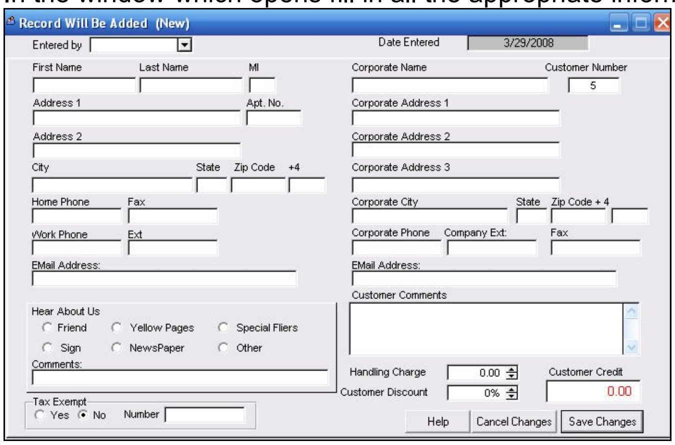
    Copy Work order: Highlight the work order you want to copy and click this button. A new work order will be created with a new invoice.

Add Customer Names & Addresses (using the Customer History Window)

1. Click the Customer History Window along the top tool bar.

2. Click the Add Customer button on the right.

3. In the window which opens fill in all the appropriate information.



4. Make sure to select a name under the Entered By drop down, this is a required field.
5. The required fields are: Entered By, First Name, Last Name.
6. Fill in as much information as you can, it will prove useful when and if you ever need to contact your customer.
7. Click Save Changes.
8. Your new customer is now added!

Edit Customer Names & Addresses

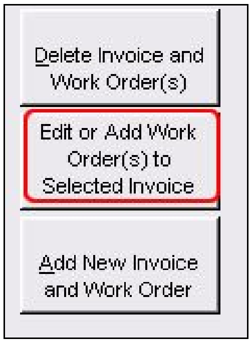
1. Click the Customer History Window along the top tool bar.

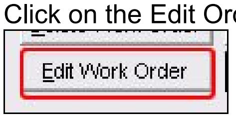
2. Highlight the customer name you want to edit (use the search feature to locate your customer by last name).
3. Click the Edit Customer button on the right.

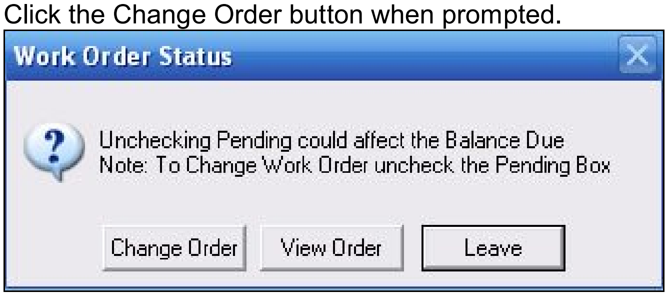
4. In the window which opens, edit any information you want to change.
5. Click Save Changes when finished.

Change Customer Name on a Work Order

1. Open the Customer History window by clicking the Customer History icon along the toolbar.

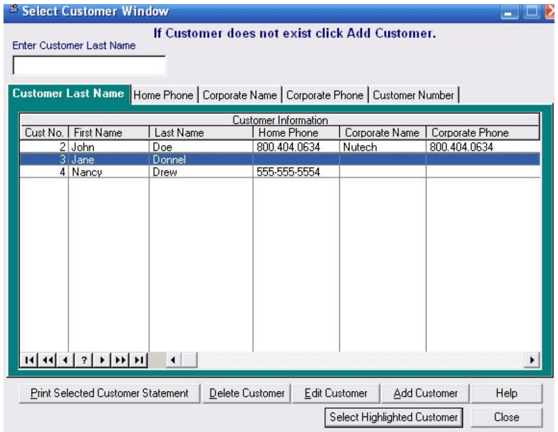

2. Locate the work order you want to make changes to.
3. Do not open the work order, just highlight it.
4. Click the "Edit or Add Work Orders to Selected Invoice" button.


5. In the window that appears highlight the order(s) you wish to edit.
6. Click on the Edit Order button.


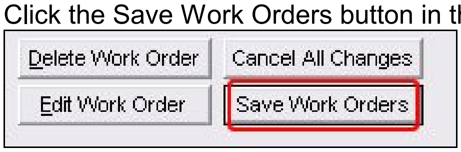
7. Click the Change Order button when prompted.


8. Click the Customer Search button on the left of the order entry window.


9. Locate the correct customer and click the Select Highlighted Customer button.



10. Click the Save Changes button.
11. Click the Save Work Orders button in the Browse Work Orders window.



Assign a Customer Name to a Nameless Work Order

1. Go to Browse – All Work Orders
2. Select Order and click Change button
3. Click Change Order when Prompted
4. Click Customer Search button and select customer name
5. When finished click Save
6. You'll be prompted to confirm change of name and click Yes. Order is now changed or assigned to customer.

Delete Customer Names & Addresses

It is not recommended to delete customer names and addresses simply because you never know if you will want to contact them in the future or if they will come back as a repeat customer. However, if you choose to delete a customer:

1. Click the Customer History Window along the top tool bar.

2. Highlight the customer name you want to edit (use the search feature to locate your customer by last name).
3. Click the Delete Customer button on the right.

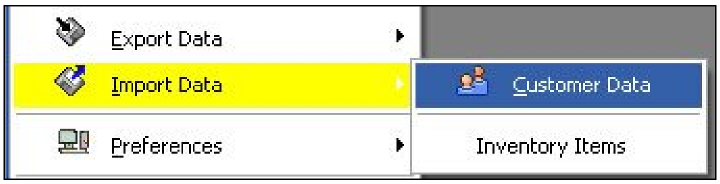
4. Note: You cannot delete a customer if there are any invoices and work orders listed for that customer. And you cannot delete any invoices and work orders if there are payments which have been received.

5. When asked to confirm the deletion click Yes or No.
6. Your customer will now be deleted.

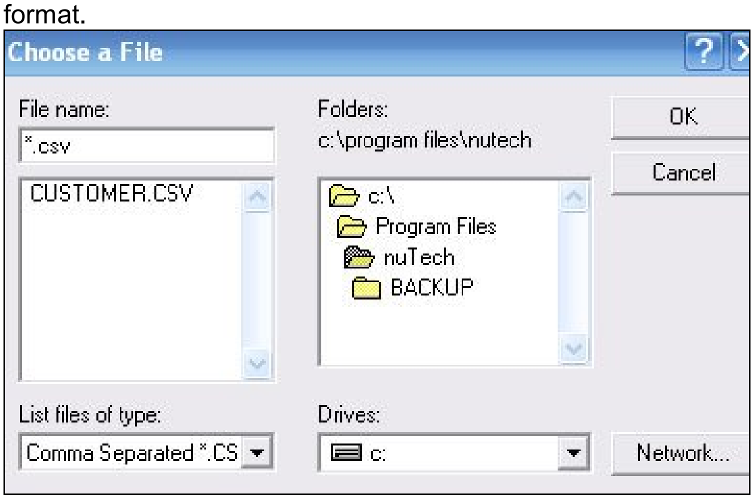
Import Customer Names & Addresses

NOTE: It is a good practice to make a backup of your data incase you do not import your customer list properly and want to start over. Simply restore your data and try again.

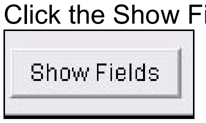
1. Inside ezFramer click File – Import Data.
2. Select Customer Data.



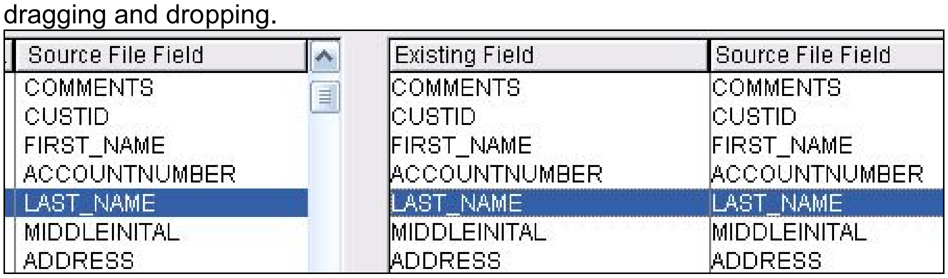
3. In the "Choose a File" window, locate the file you want to import. It must be in a .csv format.



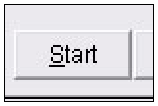
4. Click OK.
5. The import window will appear.
6. Click the Show Fields button at the bottom left.



7. Map the field names from the left (your file) to the ezFramer field names on the right by dragging and dropping.



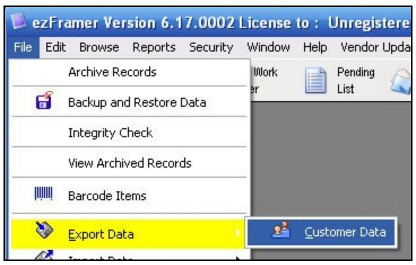
8. When ready, click Start.



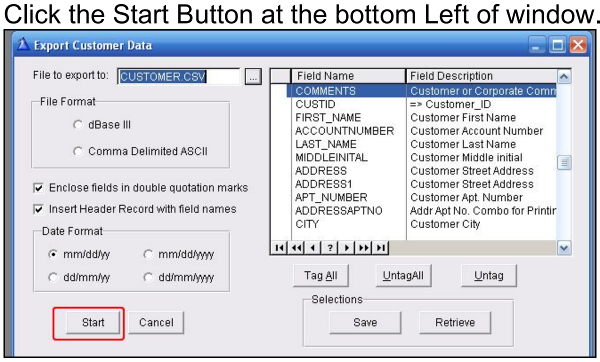
9. Your customer information will be imported.

Export Customer Names & Addresses

1. Inside ezFramer click File - Export Data.
2. Select Customer Data.



3. A window will appear which has export settings in it.   Leave all the defaults as they are.
4. Click the Start Button at the bottom Left of window.

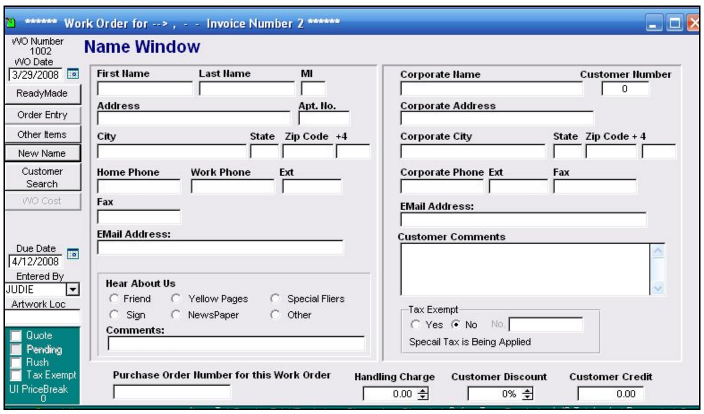


5. When finished the window will close.
6. Your file will be located in your program directory
7. The name of the file is called CUSTOMER.CSV. CSV is an excel format without any special formatting.
8. You can copy the file to another location if you want.
9. When you open the file you will see a number of columns (address, state, email, etc), and can delete anything you don't want to keep.

Add Customer Names & Addresses (using the Work Order Entry Window)

1. To add a new customer while inside the work order entry window, click the New Name button at the top left side of the window.

2. In the window which is displayed enter in the information for your customer.



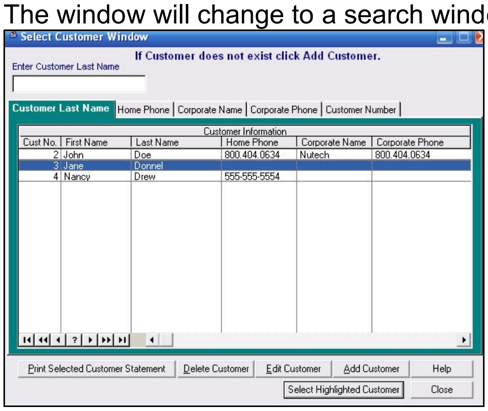
3. When finished click Order Entry button in the same section. This will bring you back to the work order entry side of the order.

4. Your new customer is now displayed at the top of the work order screen.

Another method is to use the Customer Search button which is right below the New Name button.

1. Click the Customer Search button at the left of the window.

2. The window will change to a search window displaying your customer names.



3. If your customer is listed in this window, either double click or highlight the name then click the Select Highlighted Customer button at the bottom of the window.
4. If however, your customer does not appear to exist, simply click the Add Customer button at the bottom right of the window.
5. Enter the customer information and when finished click Save Changes.
6. Now go back to the Order Entry view by clicking the Order Entry button at the top left of the window and you will see the customer name along the top of the order.

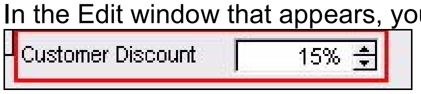
7. Now you can finish taking the order or save the order. Remember assigning a customer is a requirement for properly saving an order. If you do not have a customer and try to save the order, the software will take you to the New Name view to force you to add a customer. You can choose to go to the Customer Search window if you prefer by just clicking the Customer Search button.

Setting Customer Default Discounts

1. Open the Customer History window by clicking the Customer History button along the top toolbar.

2. Locate the customer you want to work with.
3. Click the Edit Customer button, or double click on the customer name.

4. In the Edit window that appears, you will see a Customer Discount field in the lower right.



5. Use the up and down arrows to adjust the discount percentage or just type directly in the field.
6. When finished click Save Changes.
7. You will be returned to the Customer History window.
8. Now when you enter an order and save it to the customer, you will be asked if you want to apply the discount or not and will remind you what the discount percentage is.

Calculate Customer Total Purchases

1. These totals do not include Tax amounts.
2. Highlight the customer from the Customer History Window and click Edit Customer on the right.
3. In the window that appears click the Calculate Total Purchase button at the bottom of the window and the new total will appear at the top right of the window.