

Manual entry of Accounts & Products

Enter Customers and Products

Customers Split Groups Products

Number	Name	Address	Address 2	City	State	Zip Code	Has Credit
0000002						0	Y
0000100	2008 Dodge Caravan SE	Main Office	IT	Fort Dodge	IA	50502	Y
0000101	2008 CHEVY VAN ELEC	1GCCG25C98116	UTILITY VAN	FORT DODGE	IA	50501	Y
0000102	2000 KAWASAKI	4x4 4 WHEELER		FORT DODGE	IA	50501	Y
0000103	1998 YACHT CLUB TRAILER	FOR 4x4	4H1021319w023	Moorland	IA	50566	Y
0000104	Ford pickup 2010	1FTNF285AEA18		Duncombe	IA	99999	Y
0000105	2007 Ext Cab Chevy	1GCHC29K47E55	maintance 2WD	Fort Dodge	IA	50501	Y
0000106	Ford Pickup 2010	1F6NF2850AEA1		Vincent	IA	50594	N
0000005	Pat Olmstead 50/50	1208 Meadow Lan		Webster City	IA	50595	y

Enter Customer Info

Customer Number: City:

Customer Name: State:

Address 1: ZipCode:

Address 2: Has Credit (Y or N):

OK Cancel

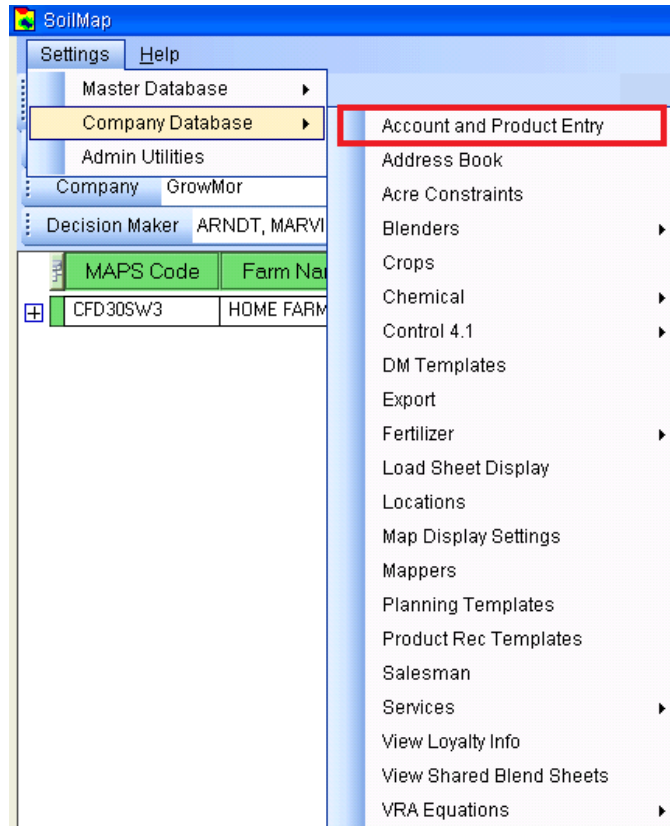
Add ... Customers

Save Customers File



How to

Company Database
Select Account & Product Entry



Account & Product Entry Form

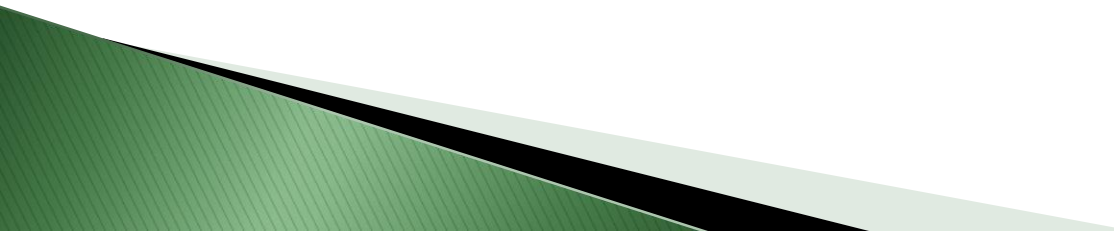
The screenshot shows a software window titled "Enter Customers and Products". At the top, there are three buttons: "Customers", "Split Groups", and "Products". A red box highlights these buttons. Below the buttons is a table with the following columns: Number, Name, Address, Address 2, City, State, Zip Code, and Has Credit. The table contains 20 rows of customer data. At the bottom of the window, there is an "Add ..." button with a dropdown menu currently showing "Customers", and a "Save Customers File" button.

Number	Name	Address	Address 2	City	State	Zip Code	Has Credit
100000	HOUSE LAVERN R	13706 COUNTY 1		SPRING VALLEY	MN	55975	Y
10050	BALLINGER FARM EST OZR	360 RALEIGH RD	%LOIS HOEFT	JACKSONVILLE	FL	32225	Y
		7230 54TH ST SE		ROCHESTER	MN	55904	Y
		% TOM HOWARD	14570 150TH ST	SPRING VALLEY	MN	55975	Y
		11953 330TH ST		STEWARTVILLE	MN	55976	Y
		20778 ST HWY 63		SPRING VALLEY	MN	55975	Y
		10275 COUNTY 2		SPRING VALLEY	MN	55975	Y
		25236 320TH ST		CHATFIELD	MN	55923	Y
101000	HRSTKA DON	17490 CO RD 2		CHATFIELD	MN	55923	Y
101015	HRSTKA STEVE	417 WINONA ST		CHATFIELD	MN	55923	Y
101200	HUEMANN MAYNARD & LIN	11311 65TH ST N		ELGIN	MN	55932	Y
10130	BALLSTADT ROGER	20129 410TH ST		GOODHUE	MN	55927	Y
101370	HUISKEN KURT	625 50TH AVE		CHANDLER	MN	56122	Y
101400	HULSHIZER JOEL	24987 EAGLE RD		SAINT CHARLES	MN	55972	Y
10150	BALOW DAVID E	65878 CO RD 2		LAKE CITY	MN	55041	Y
101590	HUNTINGTON ROBERT	30745 US HWY 5		CHATFIELD	MN	55923	Y
101750	HUPER ELLSWORTH	1005 SUDEN CIR		CHATFIELD	MN	55923	Y
101900	HUPER MARK	31757 COUNTY 1		CHATFIELD	MN	55923	Y
10200	BAMLET GENE	26488 720TH ST		HAYFIELD	MN	55940	Y

Customers, Split Groups & Products will be displayed at the top

Each one of these is a button

Customers / Split Groups / Products

- ▶ **Customers** – for editing/entering single accounts.
 - ▶ **Split Groups** – for editing/entering split groups using customers and split members.
 - ▶ **Products** – for editing/entering chemicals, fertilizers and services.
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Customers

Number	Name	Address	Address 2	City	State	Zip Code	Has Credit
100000	HOUSE LAVERN R	13706 COUNTY 1		SPRING VALLEY	MN	55975	Y
10050	BALLINGER FARM EST OZR	360 RALEIGH RD	%LOIS HOEFT	JACKSONVILLE	FL	32225	Y
				ROCHESTER	MN	55904	Y
				SPRING VALLEY	MN	55975	Y
				STEWARTVILLE	MN	55976	Y
				SPRING VALLEY	MN	55975	Y
				SPRING VALLEY	MN	55975	Y
				CHATFIELD	MN	55923	Y
				CHATFIELD	MN	55923	Y
				CHATFIELD	MN	55923	Y
				ELGIN	MN	55932	Y
				GOODHUE	MN	55927	Y
				CHANDLER	MN	56122	Y
				SAINT CHARLES	MN	55972	Y
10150	BALOW DAVID E	65878 CO RD 2		LAKE CITY	MN	55041	Y
101590	HUNTINGTON ROBERT	30745 US HWY 5		CHATFIELD	MN	55923	Y
101750	HUPER ELLSWORTH	1005 SUDEN CIR		CHATFIELD	MN	55923	Y
101900	HUPER MARK	31757 COUNTY 1		CHATFIELD	MN	55923	Y
10200	BAMLET GENE	26488 720TH ST		HAYFIELD	MN	55940	Y

Add... Customers

Save Customers File

- Displays existing records
- Existing records can be edited by clicking on any cell
- Any text displayed in red is a required field

To add a new customer:

Click the customers button

Fill in information

Press OK

Save customers file must be pressed when completed

Split Groups

Enter Customers and Products

Customers | Split Groups | Products

Add New Split Group

Split Group Number	SplitGroupDescription
0021576	REX/CRAIG HARTWIG

SplitGroupID	SplitGroupDescription	SplitSingleAccount
0021576	REX/CRAIG HARTWIG	0021576

Split Group Information

Split Group Number:

Split Description:

Current Split Members

Add Members (Select customers to add to above split group)

Customer Number	Customer Name	Address1
0000002		
0000005	Pat Olmstead 50/...	1208 Mead
0000100	2008 Dodge Cara...	Main Office
0000101	2008 CHEVY VA...	1 G CCG 25I
0000102	2000 KAWASAKI	4X4 4 WHE
0000103	1998 YACHT CL...	FOR 4X4
0000104	Ford pickup 2010	1FTNF2B5

Clear Selection

Add Delete Split Group

Save Split File

0111905	HELLICKSON FARM
0111906	ERNEST HOME PLACE
0111907	ERICKSON ELA(DUMPHY)
0112001	FRICKSON II & SKI

- Two or more customers can make up a split group
- Customers tab must be completed prior to split group creation
- Must have unique split group number
- Double click any split group to go into edit mode

To add a new split group:

Click add new split group button

Enter split group number

Select members

Save split file must be pressed when completed

Information

- ▶ Customers (single accounts/split groups) run nightly. Even though you add a customer it will not be available until following day.
 - ▶ For products, once the file is updated go to corresponding company setting menu to import products (Chemical, Fertilizer, Services)
 - ▶ Permission based and only one user should be editing these files at a time.
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