



Customer Setup

Customer SetupTasks

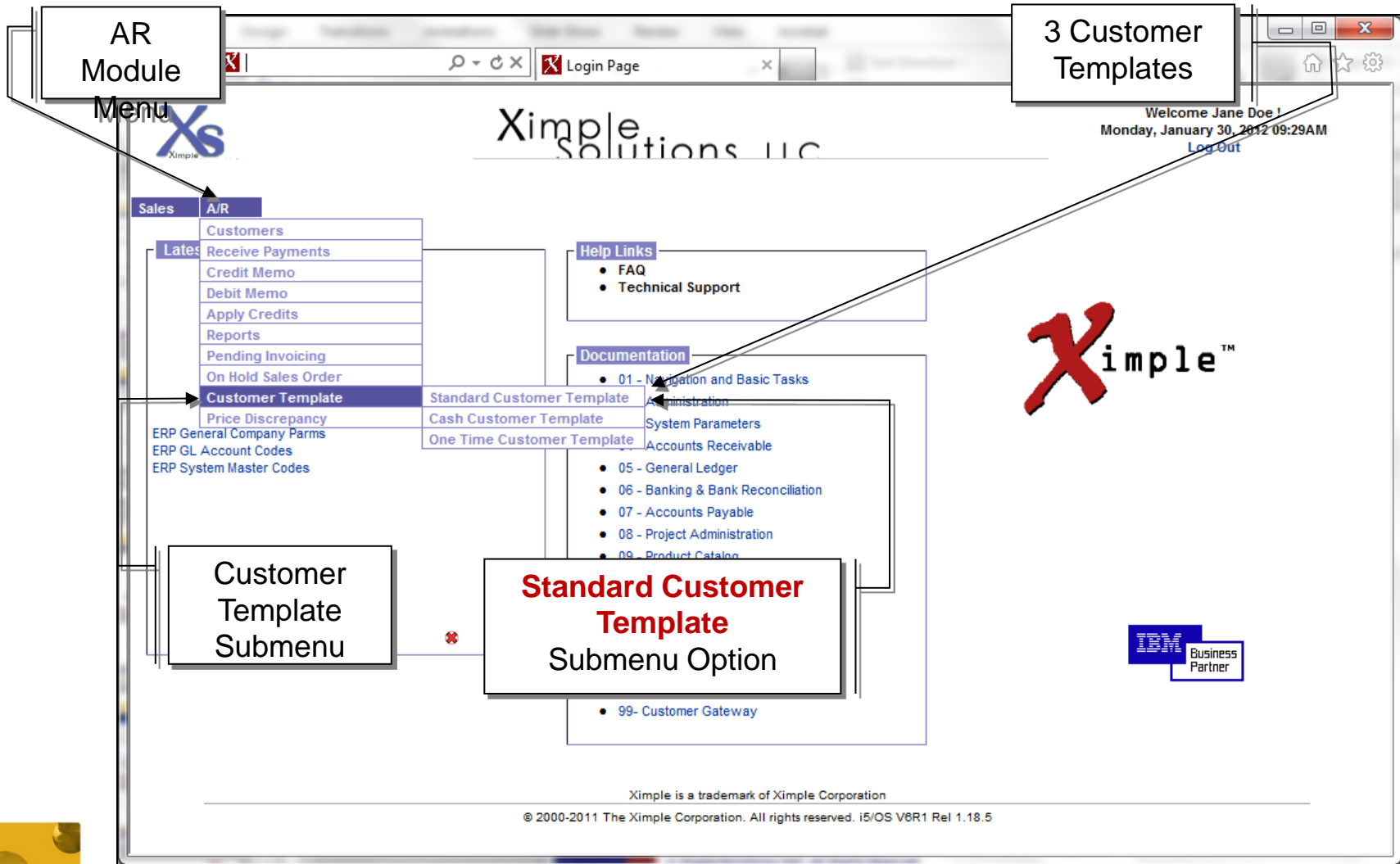
Customer Options:

- Setup Customer Templates
- Setup Customer Classification Types
- Setup Customer Classifications

• Customer Setup:

- Lookup Customer
- Add & Edit Customers
- Setup & Edit Customer Contacts
- Setup Customer Discounts
- Assign Sales Reps
- Customer Briefcase
- Assign Related Customers
- Assign Preferences
- Assign Classification
- Assign Tax Exemptions
- Setup Customer Website

Open Customer Templates



The screenshot shows the Ximple Solutions LLC web application interface. The browser window title is "Login Page". The page header includes the Ximple logo, the text "Ximple Solutions LLC", and a welcome message: "Welcome Jane Doe! Monday, January 30, 2012 09:29AM Log Out".

On the left, there is a navigation menu with the following items:

- Sales
 - A/R
 - Customers
- Later
 - Receive Payments
 - Credit Memo
 - Debit Memo
 - Apply Credits
 - Reports
 - Pending Invoicing
 - On Hold Sales Order
 - Customer Template
 - Price Discrepancy
- ERP General Company Params
- ERP GL Account Codes
- ERP System Master Codes

The "Customer Template" item is highlighted, and a submenu is displayed with the following options:

- Standard Customer Template
- Cash Customer Template
- One Time Customer Template

On the right side of the page, there are two sections:

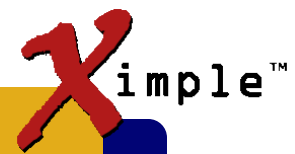
- Help Links**
 - FAQ
 - Technical Support
- Documentation**
 - 01 - Navigation and Basic Tasks
 - 05 - General Ledger
 - 06 - Banking & Bank Reconciliation
 - 07 - Accounts Payable
 - 08 - Project Administration
 - 09 - Product Catalog
 - 99- Customer Gateway


Annotations on the screenshot include:

- A box labeled "AR Module Menu" pointing to the "A/R" item in the Sales menu.
- A box labeled "3 Customer Templates" pointing to the "Customer Template" item in the Later menu.
- A box labeled "Customer Template Submenu" pointing to the submenu options.
- A box labeled "Standard Customer Template Submenu Option" pointing to the "Standard Customer Template" option.

The IBM Business Partner logo is visible in the bottom right corner. The footer text reads: "Ximple is a trademark of Ximple Corporation. © 2000-2011 The Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.18.5".

Standard Customer Template





Standard Customer Template

06/17/2010
12:18:07
User Guide

Customer

Customer Status	Active <input type="button" value="v"/>		
Price List	<input type="button" value="v"/>	Online Disable	Yes <input type="radio"/> No <input checked="" type="radio"/>
Assigned Branch	Baltimore <input type="button" value="v"/>	Accept Backorders	Yes <input type="radio"/> No <input checked="" type="radio"/>
Charge Interest	Yes <input checked="" type="radio"/> No <input type="radio"/>		
Payment Terms	Net 15 <input type="button" value="v"/>		
Discounts	Yes <input checked="" type="radio"/> No <input type="radio"/>	Specific Discount	Yes <input type="radio"/> No <input checked="" type="radio"/>
Invoice Frequency	Weekly <input type="button" value="v"/>	Invoice Print Day	Sunday <input type="button" value="v"/>
Auto Generate Cust #	Yes <input type="radio"/> No <input checked="" type="radio"/>	Customer # Length	<input type="text" value="0"/>
Increment	<input type="text" value="0"/>	Last Generated #	<input type="text" value="0"/>

Statement Preferences

Statement Type	Open Item <input type="button" value="v"/>	Statement Consolidation	Yes <input type="radio"/> No <input checked="" type="radio"/>
# of Invoices Copies	<input type="text" value="1"/>	EDI Capable	Yes <input type="radio"/> No <input checked="" type="radio"/>
# of Packing Slip Copies	<input type="text" value="1"/>	Price Packing Slip	Yes <input type="radio"/> No <input checked="" type="radio"/>
Charge Restocking Fee	Yes <input checked="" type="radio"/> No <input type="radio"/>	Print Long Description	Yes <input type="radio"/> No <input checked="" type="radio"/>
Past Due Format	Summary statement prints each open invoice with the summary of amount due <input type="button" value="v"/>		
Current Due Format	Summary statement prints each open invoice with the summary of amount due <input type="button" value="v"/>		
Future Due Format	Summary statement prints each open invoice with the summary of amount due <input type="button" value="v"/>		
	Email	Fax	Snail Mail
Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Quote	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Form Continues
on Next Slide


Standard Customer Template

Continued from
Previous Slide

Preferences			
Shipping Method		UPS Ground	
Bill Freight		Yes <input checked="" type="radio"/> No <input type="radio"/>	
Allow Direct Shipments		Yes <input checked="" type="radio"/> No <input type="radio"/>	
Bar Code Required		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Freight Code		Default Freight Amt.	
		5.000000	
Job Marking Required		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Credit Preferences			
Preferred Payment Method		Credit Card	
Force Cash Payment		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Credit Limit		1200.00	
Temp. Credit Limit		0.00	
Aged Dollar Amount		0.00	
Month End Cutoff Day			
Preferred Fulfillment Method		Availability	
Accept Checks		Yes <input checked="" type="radio"/> No <input type="radio"/>	
Credit On Hold		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Temp. Credit Limit Exp. Date			
Aged Credit Authorization # of Days		0	
Credit Group		Credit Group 01	
Ordering Options Preferences			
Emergency Back Orders		Yes <input checked="" type="radio"/> No <input type="radio"/>	
PO Required		Yes <input type="radio"/> No <input checked="" type="radio"/>	
Min. Order Code			
Min. Order Amount		0.00	
Service Preferences			
Min. Service Charge		0.00	
Service Charge Forgiveness Amount		0.00	
Save		Reset	
Cancel			

Click **Save**

Cash Customer Template



Cash Customer Template

06/17/2010
12:16:17
User Guide

Customer

Customer Status	Cash <input type="button" value="v"/>		
Price List	<input type="button" value="v"/>	Online Disable	Yes <input checked="" type="radio"/> No <input type="radio"/>
Assigned Branch	Rockville <input type="button" value="v"/>	Accept Backorders	Yes <input type="radio"/> No <input checked="" type="radio"/>
Charge Interest	Yes <input type="radio"/> No <input checked="" type="radio"/>		
Payment Terms	Due On Receipt <input type="button" value="v"/>		
Discounts	Yes <input checked="" type="radio"/> No <input type="radio"/>	Specific Discount	Yes <input type="radio"/> No <input checked="" type="radio"/>
Invoice Frequency	<input type="button" value="v"/>		
Auto Generate Cust #	Yes <input type="radio"/> No <input checked="" type="radio"/>	Customer # Length	<input type="text" value="0"/>
Increment	<input type="text" value="0"/>	Last Generated #	<input type="text" value="0"/>

Statement Preferences

Statement Type	No Statement <input type="button" value="v"/>	Statement Consolidation	Yes <input checked="" type="radio"/> No <input type="radio"/>
# of Invoices Copies	<input type="text" value="1"/>	EDI Capable	Yes <input type="radio"/> No <input checked="" type="radio"/>
# of Packing Slip Copies	<input type="text" value="1"/>	Price Packing Slip	Yes <input type="radio"/> No <input checked="" type="radio"/>
Charge Restocking Fee	Yes <input checked="" type="radio"/> No <input type="radio"/>	Print Long Description	Yes <input type="radio"/> No <input checked="" type="radio"/>
Past Due Format	<input type="button" value="v"/>		
Current Due Format	<input type="button" value="v"/>		
Future Due Format	<input type="button" value="v"/>		

	Email	Fax	Snail Mail	EDI
Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quote	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Form Continues
on Next Slide


Cash Customer Template

Continued from
Previous Slide

Shipping Preferences			
Shipping Method	Will Call	Freight Code	
Bill Freight	Yes <input type="radio"/> No <input checked="" type="radio"/>	Default Freight Amt.	0.000000
Allow Direct Shipments	Yes <input type="radio"/> No <input checked="" type="radio"/>	Bar Code Required	Yes <input type="radio"/> No <input checked="" type="radio"/>
		Job Marking Required	Yes <input type="radio"/> No <input checked="" type="radio"/>
Credit Preferences			
Preferred Payment Method	Cash / COD	Preferred Fulfillment Method	Availability
Force Cash Payment	Yes <input checked="" type="radio"/> No <input type="radio"/>	Accept Checks	Yes <input checked="" type="radio"/> No <input type="radio"/>
Credit Limit	0.00	Credit On Hold	Yes <input type="radio"/> No <input checked="" type="radio"/>
Temp. Credit Limit	0.00	Temp. Credit Limit Exp. Date	
Aged Dollar Amount	0.00	Aged Credit Authorization # of Days	0
Month End Cutoff Day		Credit Group	Credit Group 01
Ordering Options Preferences			
Emergency Back Orders	Yes <input type="radio"/> No <input checked="" type="radio"/>	PO Required	Yes <input type="radio"/> No <input checked="" type="radio"/>
Min. Order Code		Min. Order Amount	0.00
Service Preferences			
Min. Service Charge	0.00	Service Charge Forgiveness Amount	0.00
		Save	Reset
		Cancel	

Click **Save**

One Time Customer Template



One Time Customer Template

Ximple Solutions

04/11/2011

12:44:26

User Guide

Shipping Preferences

Shipping Method	<div style="border: 1px solid black; padding: 2px;">UPS Next Day Air</div>		
Bill Freight	Yes <input checked="" type="radio"/> No <input type="radio"/>	Default Freight Amt.	<div style="border: 1px solid black; padding: 2px;">2.500000</div>
Job Marking Required	Yes <input checked="" type="radio"/> No <input type="radio"/>		

Ordering Options Preferences

PO Required	Yes <input checked="" type="radio"/> No <input type="radio"/>		
Min. Order Code	<div style="border: 1px solid black; padding: 2px;">Dollar Amount</div>	Min. Order Amount	<div style="border: 1px solid black; padding: 2px;">5.00</div>
Charge Restocking Fee	Yes <input checked="" type="radio"/> No <input type="radio"/>		
Sales Price Multiplier	<div style="border: 1px solid black; padding: 2px;">0.000000</div>		

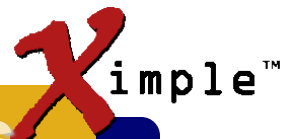
Save

Reset

Cancel

Click **Save**

Open Customer Classification Types



Administration Module Menu

Customer Classification Submenu

Classification Types Submenu Option

Administration
List Comments
List Products
List Employees
User Authorization
Customer Classification
Vendor Classification
Credit Group
Purchasing Group

Customer Classification Types
Customer Classification

Help Links
• FAQ
• Technical Support

Documentation
• 01 - Navigation and Basic Tasks
• 02 - Administration
• 03 - System Parameters
• 04 - Project Administration
• 09 - Product Catalog
• 10 - Warehousing
• 11 - Purchasing
• 12 - Sales
• 13 - Billing
• 14 - WMS
• 98- EDI Setup
• 99 - Customer Gateway

Welcome Jane Doe !
Monday, June 20, 2011 02:15PM
[Log Out](#)

Ximple Solutions, LLC


Ximple™

IBM Business Partner

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javascript:window.open('/Ximple/admin/CustomerClassificationType.do', '_blank', 'top=80,left=80,width=800, status=yes, ...

Customer Classification Types Page



Customer Classification Types

05/06/2010
16:22:36
User Guide

Customer Classification Types (P1139)				
Classification Type	Max Levels	Variable Level	Mult. Selection	
Manufacturer	4	Yes	Yes	
Reseller	4	Yes	Yes	
SPA Rebates	2	Yes	Yes	

Position to Name: Go

Add New
Show All

Click
Add New

Popup
Menu

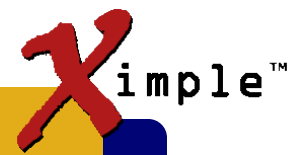
Popup Menu:


Edit: Edit Customer Classification Type

Deactivate: Deactivate classification type

Activate: Re-activate classification type

Add Customer Classification Type



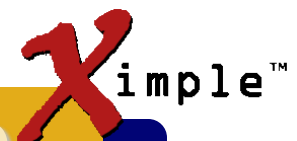
 Ximple Solutions
Customer Classification Type
05/06/2010 16:22:49
User Guide

New Customer Classification Type (P1140)

*Name	<input type="text" value="SPA Rebates Group"/>
*Maximum Level	<input type="text" value="3"/>
Variable Level	<input checked="" type="radio"/> Yes <input type="radio"/> No
Multiple Selection	<input checked="" type="radio"/> Yes <input type="radio"/> No

Click **Save**

Open Customer Classification Page



Administration Module Menu

Customer Classification Submenu

Classification Submenu Option

Administration

- List Comments
- List Products
- List Employees
- User Authorization
- Customer Classification
- Vendor Classification
- Credit Group
- Purchasing Group

Customer Classification Types

Customer Classification

Help Links

- FAQ
- Technical Support

Documentation

- 01 - Navigation and Basic Tasks
- 02 - Administration
- 03 - Accounts Payable
- 04 - Accounts Receivable
- 05 - Bank Reconciliation
- 06 - Budgeting
- 07 - Cash Management
- 08 - Project Administration
- 09 - Product Catalog
- 10 - Warehousing
- 11 - Purchasing
- 12 - Sales
- 13 - Billing
- 14 - WMS
- 98- EDI Setup
- 99 - Customer Gateway

Welcome Jane Doe !
Monday, June 20, 2011 02:15PM
[Log Out](#)

Ximple Solutions, LLC

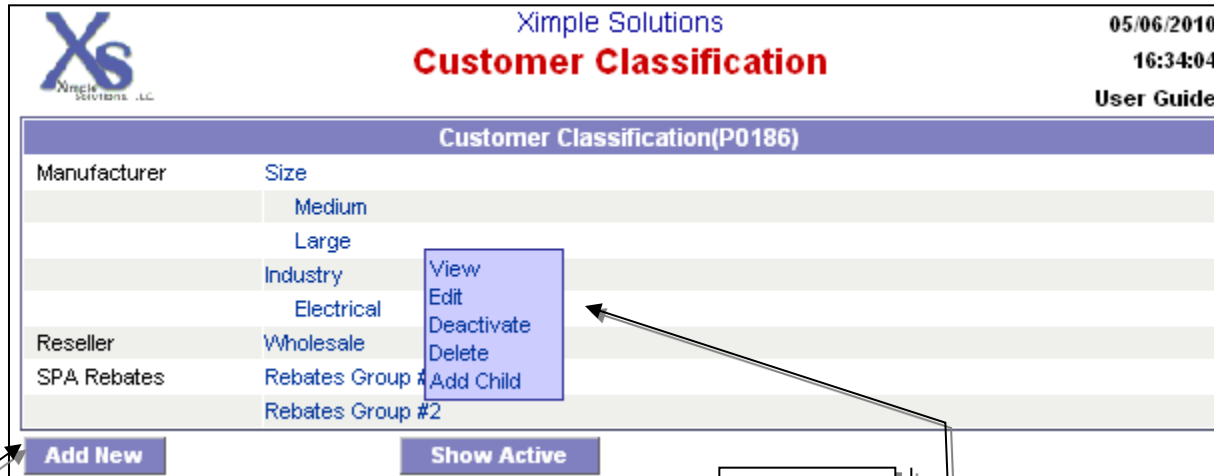
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javascript:window.open('/Ximple/ar/CustomerClassification.do','_blank','top=80,left=80,width=800,status=yes,height=')

Customer Classification Page



Ximple Solutions
Customer Classification
05/06/2010
16:34:04
User Guide

Customer Classification(P0186)	
Manufacturer	Size
	Medium
	Large
	Industry
	Electrical
Reseller	Wholesale
SPA Rebates	Rebates Group #1
	Rebates Group #2

Add New **Show Active**

Click
Add New

Popup
Menu

Popup Menu:

View: View classification information

Edit: Edit Customer Classification


Deactivate: Deactivate classification type

Activate: Re-activate classification type

Delete: Delete classification (any child levels must be deleted first)

Add Child: Add child level classification

New Customer Classification

 Ximple Solutions
Customer Classification
05/06/2010
16:34:37
User Guide

New Customer Classification(P0188)

*Classification Type SPA Rebates ▼

*Name Group 2

Is Last Level ☒ Yes ☐ No

Click
Save

Add Child Level

Xs Ximple Solutions .LLC

Customer Classification

05/06/2010 16:34:04 User Guide

Customer Classification(P0186)	
Manufacturer	Size
	Medium
	Large
	Industry
	Electrical
Reseller	Wholesale
SPA Rebates	Rebates Group #1
	Rebates Group #2

Add New **Show Active**

View
Edit
Deactivate
Delete
Add Child

Select
Add Child

Xs Ximple Solutions .LLC

Customer Classification

05/06/2010 16:35:22 User Guide

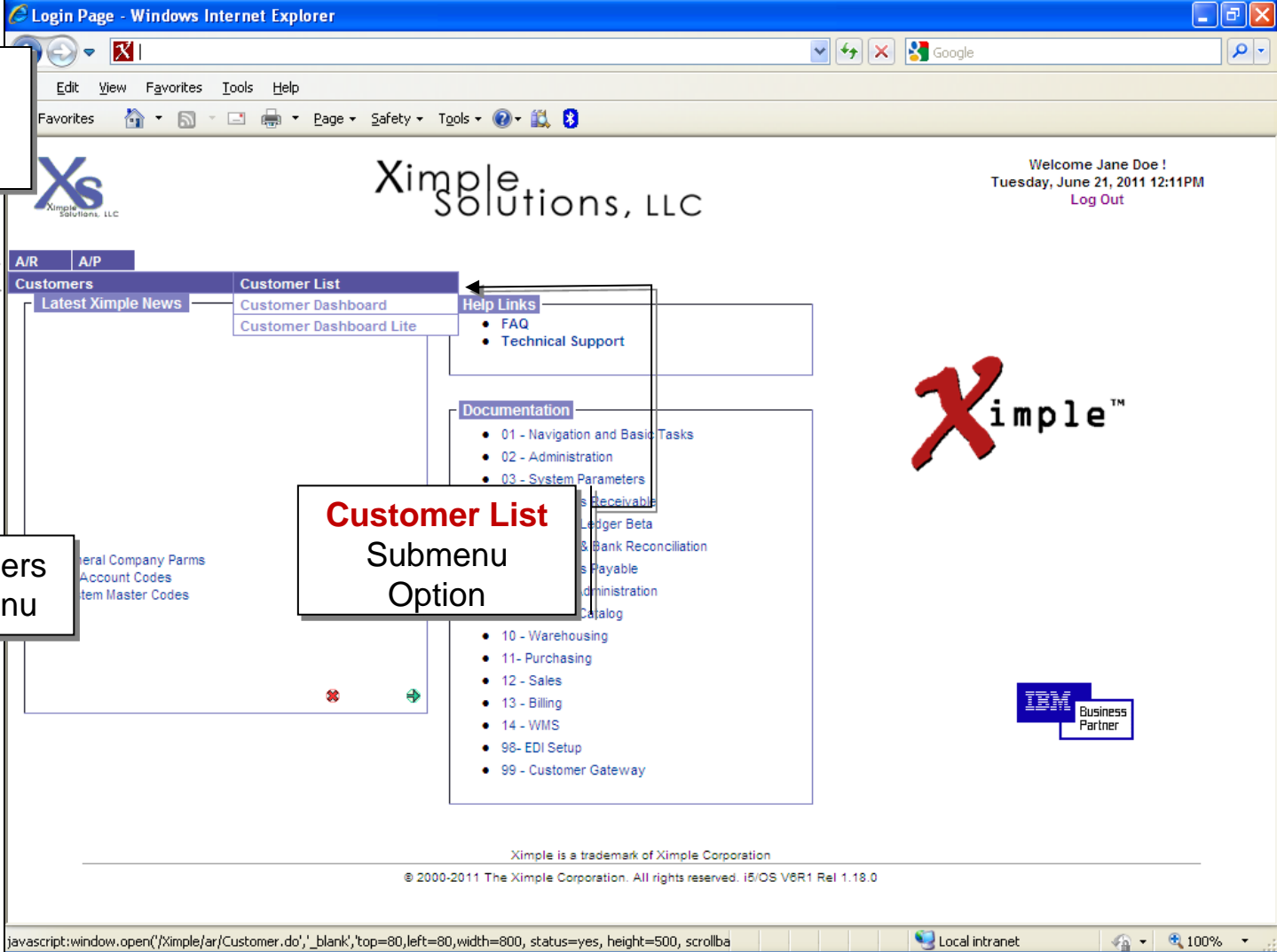
Size >>

New Customer Classification(P0188)	
*Name	Large Companies (+200)
Is Last Level	<input checked="" type="radio"/> Yes <input type="radio"/> No

Save **Reset** **Cancel**

Click **Save**

Open Customer List Page



A/R Module Menu

Customers Submenu

Customer List Submenu Option

Login Page - Windows Internet Explorer

Welcome Jane Doe !
Tuesday, June 21, 2011 12:11PM
[Log Out](#)

Ximple Solutions, LLC

Navigation Menu:

- A/R
- A/P
- Customers
 - Latest Ximple News
 - Customer List (Selected)
 - Customer Dashboard
 - Customer Dashboard Lite
- Help Links
 - FAQ
 - Technical Support
- Documentation
 - 01 - Navigation and Basic Tasks
 - 02 - Administration
 - 03 - System Parameters
 - 04 - Receivable
 - 05 - Ledger Beta
 - 06 - Bank Reconciliation
 - 07 - Payable
 - 08 - Administration
 - 09 - Catalog
 - 10 - Warehousing
 - 11 - Purchasing
 - 12 - Sales
 - 13 - Billing
 - 14 - WMS
 - 98 - EDI Setup
 - 99 - Customer Gateway

Footer:


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javascript:window.open('/Ximple/ar/Customer.do','_blank','top=80,left=80,width=800,status=yes,height=500,scrollba

Local intranet 100%

Lookup Customer

Enter Search
Criteria



Ximple Solutions
Customer Lookup

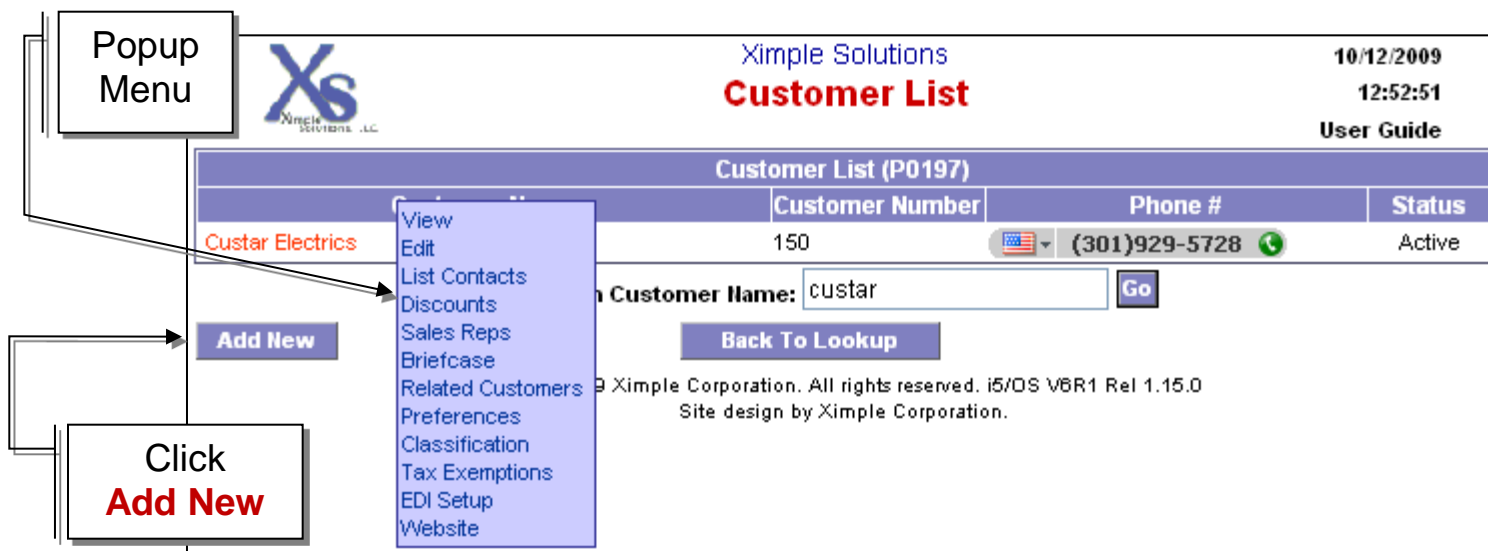
10/12/2009
12:31:05
[User Guide](#)

Customer Lookup (P0197)

Customer Number	<input type="text"/>
OR	
Customer Name	<input type="text"/>
Phone #	<input type="text"/>
Customer Classification	<input type="text"/> <input type="button" value="v"/>
	<input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> No Class. Assigned
Status	All <input type="button" value="v"/>
Include Related Customer	<input type="checkbox"/>
Report Format	<input checked="" type="radio"/> HTML <input type="radio"/> PDF <input type="radio"/> MS Excel <input type="button" value="Clear All"/>

Click **Lookup**

Customer List Page



Popup Menu

Click Add New

Customer List (P0197)

Customer Number	Phone #	Status
150	(301)929-5728	Active

Customer Name:

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Site design by Ximple Corporation.

Popup Menu:

View: View, edit and add contact information for customer (address/email/phone)

Edit: Edit customer information

List Contacts: View, edit and add customer contacts

Sales Reps: View, edit and assign sales reps to customer

Briefcase: View and schedule events for customer

Related Customers: View, edit and add related customers

Preferences: View and edit customer preferences (statements/shipping/etc)


Classification: View, edit and assign customer classifications

Tax Exemptions: View, edit and add tax exemptions to customer

EDI Setup: View and edit customer EDI preferences

Website: View, edit and add customer websites

Add New Customer



Ximple Solutions
Add New Customer

10/12/2009
13:24:27
User Guide

Add New Customer(P0199)

*Customer Name	<input type="text" value="Custar Electrics"/>		
Customer Number	<input type="text" value="20563"/>	Customer Status	<input type="button" value="Active"/>
Acronym	<input type="text"/>	Logo Image File	<input type="text"/>
Federal ID	<input type="text"/>	Online Password	<input type="text"/>
DUNS ID	<input type="text"/>	Log In Attempts	<input type="text"/>
Price List	<input type="button"/>	Online Disable	Yes <input checked="" type="radio"/> No <input type="radio"/>
Assigned Branch	<input type="button"/>	Accept Backorders	Yes <input checked="" type="radio"/> No <input type="radio"/>
*Start Date	<input type="text" value="08/01/2009"/>	End Date	<input type="text"/>

Address Information

***Address Type**

***Address**

***City** ***State** ***Zip**

County

***Country**

Phone and Email Information

	Country Code	Number	Extension	Phone Type
Phone1	<input type="button" value="1(USA)"/>	<input type="text" value="3019876543"/>	<input type="text"/>	<input type="button" value="Work"/>
Phone2	<input type="button"/>	<input type="text"/>	<input type="text"/>	<input type="button"/>
Phone3	<input type="button"/>	<input type="text"/>	<input type="text"/>	<input type="button"/>

Email

Financial Information

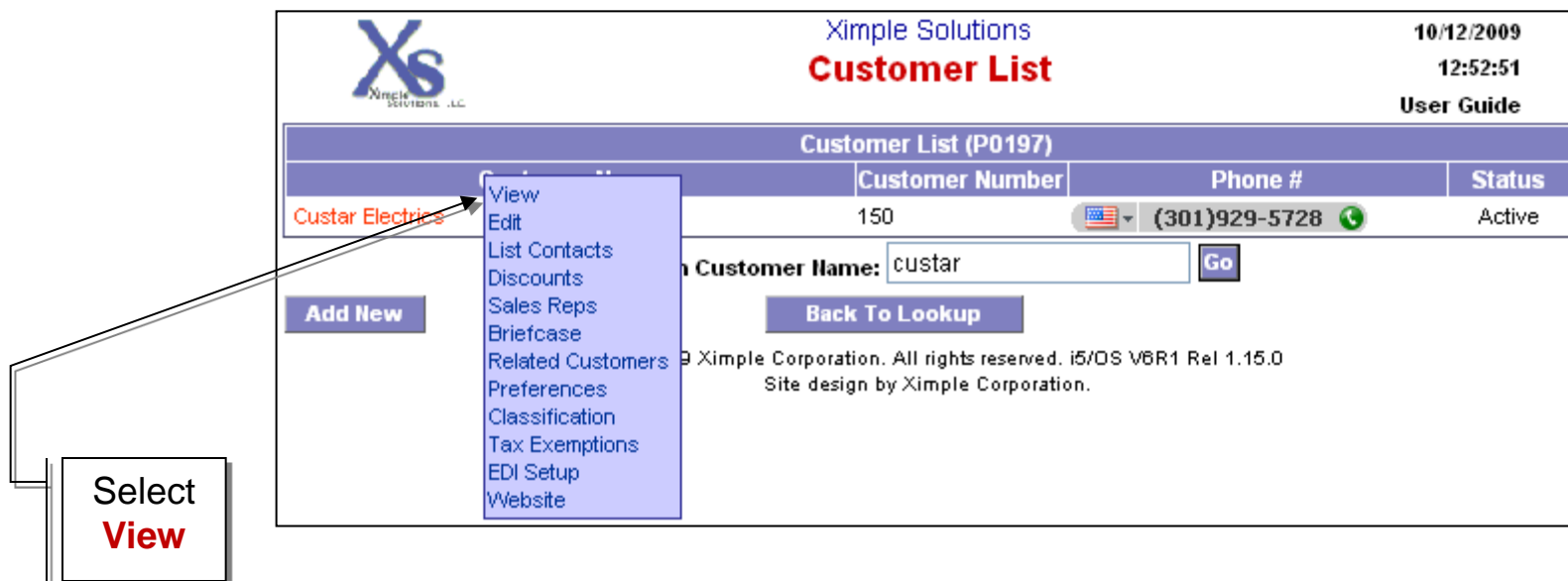
Bank	<input type="button" value="Citibank"/>	*Currency	<input type="button" value="US Dollar"/>
Bank Account#	<input type="text"/>	*G/L Account	<input type="button" value="Accounts Receivable"/>
Rate/hour	<input type="text"/>	Charge Interest	Yes <input checked="" type="radio"/> No <input type="radio"/>
*Payment Terms	<input type="button" value="Due On Receipt"/>	Credit Group	<input type="button" value="Credit Group 01"/>
Discounts	Yes <input checked="" type="radio"/> No <input type="radio"/>	Specific Discount	Yes <input checked="" type="radio"/> No <input type="radio"/>
Invoice Frequency	<input type="button" value="Monthly"/>		

If 'No' Will
Need to Setup
Password
(Preferences)

Click
Save

Company
Default
(Param Setup)

Edit Customer: Address, Phone, Email



The screenshot shows the Ximple Solutions Customer List interface. At the top, the Ximple Solutions logo is on the left, the title 'Customer List' is in the center, and the date '10/12/2009' and time '12:52:51' are on the right. Below the title is a 'User Guide' link. The main section is titled 'Customer List (P0197)' and contains a table with columns: Customer Number, Phone #, and Status. The first row shows 'Custar Electric' with Customer Number 150 and Phone # (301)929-5728. A context menu is open over 'Custar Electric', listing options: View, Edit, List Contacts, Discounts, Sales Reps, Briefcase, Related Customers, Preferences, Classification, Tax Exemptions, EDI Setup, and Website. An arrow points from a 'Select View' box to the 'View' option in the menu. Below the table is a search bar with 'Custar' entered and a 'Go' button. At the bottom, there is a 'Back To Lookup' button and a footer with copyright information.

Ximple Solutions
Customer List
 10/12/2009
 12:52:51
 User Guide

Customer List (P0197)

Customer Number	Phone #	Status
150	(301)929-5728	Active


Customer Name:

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 Site design by Ximple Corporation.

Select View

- View
- Edit
- List Contacts
- Discounts
- Sales Reps
- Briefcase
- Related Customers
- Preferences
- Classification
- Tax Exemptions
- EDI Setup
- Website

Edit Customer: Address, Phone, Email



Ximple Solutions
View Customer

10/12/2009
14:48:00
User Guide

View Customer Information (P0198)

Customer Name	Custar Electrics	Customer Status	Active
Customer Number	150	Logo Image File	
Acronym		Online Password	
Federal ID		Log In Attempts	
DUNS ID		Online Disable	No
Price List	Company Default Price List 02	Accept Back Orders	Yes
Assigned Branch	Rockville	End Date	
Start Date	01/01/2000		

Financial Information

Bank		Currency	US Dollar
Bank Account#		G/L Account	Accounts Receivable
Rate/hour		Charge Interest	Yes
Payment Terms	Net 30	Credit Group	Credit Group 01
Accounts	Yes	Special Discount	Yes
Invoice Frequency	Monthly	Invoice Print Day	
Auto Checks	Yes	Month End Cutoff Day	15

Close Window

[Address | Phone | Email]

List Address (P0405)

Address	Type	Eff. Date	Exp. Date
1111 Billing Way,Kensington,MD 20895	Bill to	08/21/2008	
*156 Deer Drive,Kensington,MD 20895-2004	Mail to	07/28/2006	
5698 Dresden Parkway,McKeesport,PA 15132	Ship to	09/04/2009	

Add New
Show All

Position T Go

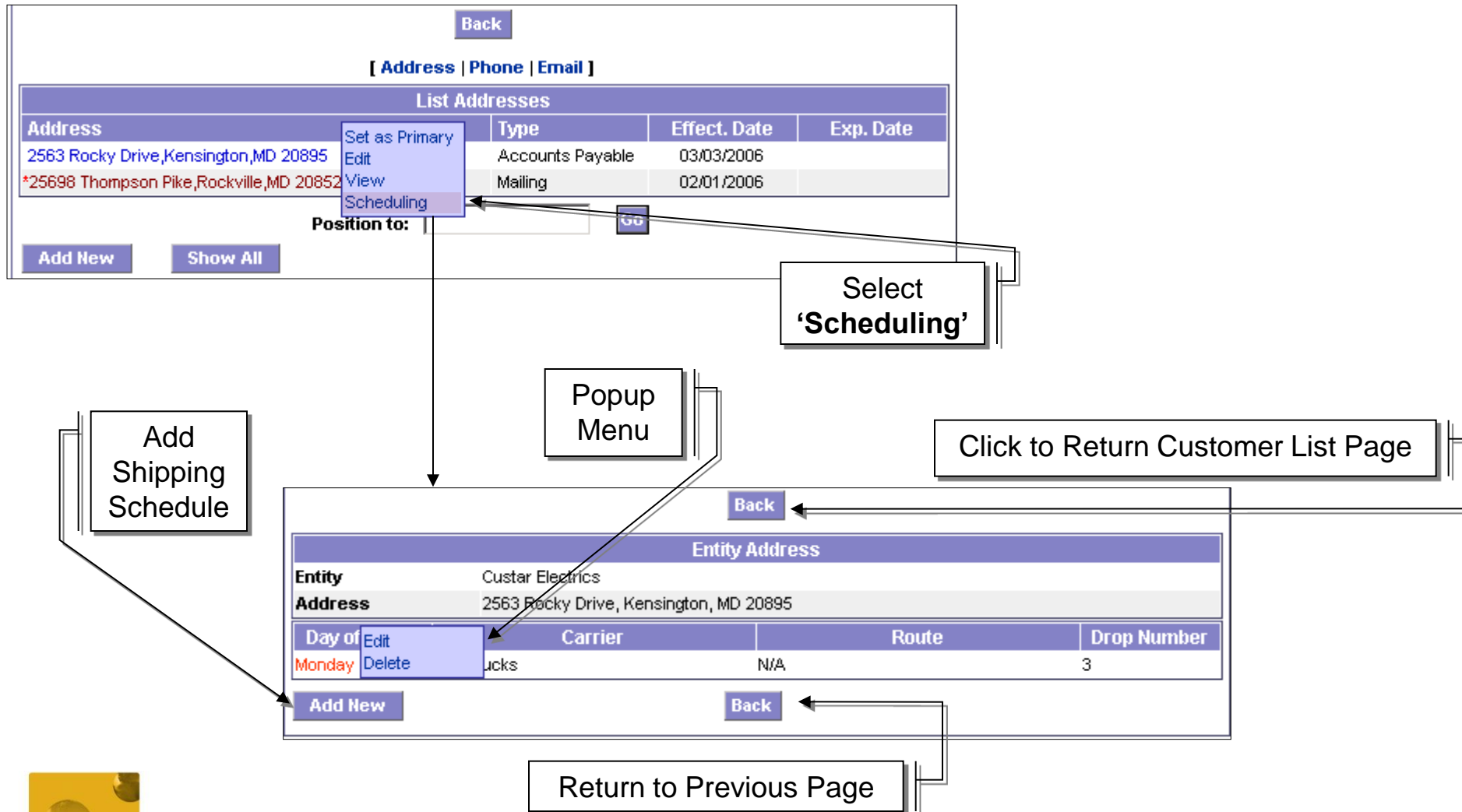
View
Edit
Set as Primary
Scheduling

Click to Return
Customer List Page

Tabs: Select to View

Add New: Address, Phone, Email

Shipping Schedule



Add Shipping Schedule

Only Appears if
Route
Assignment is
Mandatory for
Carrier

[Back](#)


Entity Address	
Entity	Custar Electrics
Address	156 Deer Drive, Kensington, MD 20895-2004

New Shipping Schedule	
Day of Week	Thursday ▼
*Carrier	Rigel Electrical Corp ▼
*Route	2 - Rockville ▼
*Drop Number	1 ←

[Save](#) [Reset](#) [Cancel](#)


Click
Save

Edit Customer Information



Ximple Solutions
Customer List

10/12/2009
12:52:51
User Guide

Customer List (P0197)			
	Customer Number	Phone #	Status
Custar Electrics	150	 (301)929-5728 	Active


Customer Name:

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Site design by Ximple Corporation.

- View
- Edit
- List Contacts
- Discounts
- Sales Reps
- Briefcase
- Related Customers
- Preferences
- Classification
- Tax Exemptions
- EDI Setup
- Website

Select
Edit

Edit Customer Information



Ximple Solutions
Edit Customer

10/12/2009
14:57:29
User Guide

Edit Customer(P0200)


<p>*Customer Name <input type="text" value="Custar Electrics"/></p> <p>Customer Number <input type="text" value="150"/></p> <p>Acronym <input type="text"/></p> <p>Federal ID <input type="text"/></p> <p>DUNS ID <input type="text"/></p> <p>Price List <input type="text" value="Company Default Price List 02"/></p> <p>Assigned Branch <input type="text" value="Rockville"/></p> <p>*Start Date <input type="text" value="01/01/2000"/></p>	<p>Customer Status <input type="text" value="Active"/></p> <p>Logo Image File <input type="text"/></p> <p>Online Password <input type="text"/></p> <p>Log In Attempts <input type="text"/></p> <p>Online Disable Yes <input type="radio"/> No <input checked="" type="radio"/></p> <p>Accept Backorders Yes <input checked="" type="radio"/> No <input type="radio"/></p> <p>End Date <input type="text"/></p>
--	---

Financial Information

<p>Bank <input type="text"/></p> <p>Bank Account# <input type="text"/></p> <p>Rate/hour <input type="text"/></p> <p>*Payment Terms <input type="text" value="Net 30"/></p> <p>Discounts Yes <input checked="" type="radio"/> No <input type="radio"/></p> <p>Invoice Frequency <input type="text" value="Monthly"/></p>	<p>*Currency <input type="text" value="US Dollar"/></p> <p>*G/L Account <input type="text" value="Accounts Receivable"/></p> <p>Charge Interest Yes <input checked="" type="radio"/> No <input type="radio"/></p> <p>Credit Group <input type="text" value="Credit Group 01"/></p> <p>Specific Discount Yes <input checked="" type="radio"/> No <input type="radio"/></p>
---	--





Open Customer Contact List Page



Ximple Solutions
Customer List

10/12/2009
12:52:51
User Guide

Customer List (P0197)			
	Customer Number	Phone #	Status
Custar Electrics	150	 (301)929-5728 	Active

Add New

View
Edit
List Contacts
Discounts
Sales Reps
Briefcase
Related Customers
Preferences
Classification
Tax Exemptions
EDI Setup
Website

Customer Name:

Back To Lookup

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Site design by Ximple Corporation.

Select
Contacts

Customer Contact List Page

Diagram illustrating the Customer Contact List Page interface and its components:

Page Header:

- Ximple Solutions
- 10/12/2009
- 15:39:43
- User Guide

Customer Contact List(P0201)

Custar Electrics

Contact Name	Contact Type	Job Title	Phone	Fax
James Rover	Shipping Contact			
John S Smith	Accounts Payable	Manager	(301) 123-4567 (Work)	
Margot Smith	Account Receivable	Administrator	(301) 222-5555 (Fax)	(301) 222-5555

Buttons:

- View:** View, edit and add contact information for customer contact (address/email/phone)
- Edit:** Edit customer contact information
- Briefcase:** View and schedule events for customer contact
- Add New:** Click Add New
- Close Window:** Close Window
- Return to Customer List Page:** Return to Customer List Page

Form:

Position To Contact Name: **Go**


Popup Menu:

View: View, edit and add contact information for customer contact (address/email/phone)

Edit: Edit customer contact information

Briefcase: View and schedule events for customer contact

Add Customer Contact



Ximple Solutions
Add Customer Contact

10/12/2009
15:46:25
User Guide

Add Customer Contact(P0202)

Custar Electrics

Prefix	*First Name	Middle Name	*Last Name	Suffix
<input type="text" value=""/>	<input type="text" value="Dorothy"/>	<input type="text" value=""/>	<input type="text" value="Stanley"/>	<input type="text" value=""/>

SSN/ID	Citizenship	Job Title	*Contact Type
<input type="text" value=""/>	<input type="text" value="United States Of America"/>	<input type="text" value="Manager"/>	<input type="text" value="Account Receivable"/>

Customer Contact's Address Information

*Address Type	<input type="text" value="Bill to"/>		
*Address	<input type="text" value="1111 Billing Way"/>		
	<input type="text" value=""/>		
	<input type="text" value=""/>		
*City	<input type="text" value="Kensington"/>	*State	<input type="text" value="MD"/>
		*Zip	<input type="text" value="20895"/>
County	<input type="text" value=""/>	*Country	<input type="text" value="United States Of America"/>

Customer Contact's Phone and Email Information

	Country Code	Number	Extension	Phone Type
Phone1	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
Phone2	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
Phone3	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
Email	<input type="text" value=""/>			<input type="text" value=""/>

Click **Save**

Edit Contact: Address, Phone, Email



Ximple Solutions
Customer Contact List

10/12/2009
15:39:43
User Guide

Customer Contact List(P0201)				
Custar Electrics				
Contact Name	Contact Type	Job Title	Phone	Fax
James Rover	Shipping Contact			
John S. Smith	Accounts Payable	Manager	(301) 123-4567 (Work)	
Margot Smith	Account Receivable	Administrator	(301) 222-5555 (Fax)	(301) 222-5555

[View](#)
[Edit](#)
[Briefcase](#)

Position To Contact Name:

Select
View

Edit Contact: Address, Phone, Email

Ximple Solutions 10/12/2009 15:55:23 User Guide

View Customer Contact

View Customer Contact(P0204)

Custar Electrics

Prefix	First Name	Middle Name	Last Name	Suffix
	James		Rover	

SSN/ID	Citizenship	Job Title	Contact Type
			Shipping Contact

[Back](#)

[[Address](#) | [Phone](#) | [Email](#)]

List Address (P0405)

Address	Type	Eff. Date	Exp. Date
*1111 Billing Way,Kensington,MD 20895	Bill to	06/16/2009	
1569 Hector Drive,Carrollton,TX 75006	Ship to	08/28/2009	

[View](#)
[Edit](#)
[Set as Primary](#)

[Go](#)

[Add New](#) [Show All](#)

Click to Return to
Customer
Contact List Page

Tabs: Select to View

Add New Entry

Show Active & Inactive: Addresses, Phones, Emails

Edit Customer Contact Information

Xs Ximple Solutions 10/12/2009 15:39:43 User Guide

Customer Contact List

Customer Contact List(P0201)
Custar Electrics

Contact Name	Contact Type	Job Title	Phone	Fax
James Rover	Shipping Contact			
John S Smith	Accounts Payable	Manager	(301) 123-4567 (Work)	
Margot Smith	Account Receivable	Administrator	(301) 222-5555 (Fax)	(301) 222-5555

View
Edit
Briefcase

Position To Contact Name:

Select Edit

Xs Ximple Solutions 10/12/2009 16:00:45 User Guide

Edit Customer Contact

Edit Customer Contact(P0203)
Custar Electrics

Prefix	First Name	Middle Name	Last Name	Suffix
<input type="text"/>	James	<input type="text"/>	Rover	<input type="text"/>
SSN/ID	Citizenship	Job Title	Contact Type	
<input type="text"/>	United States Of America	Manager	Shipping Contact	

Click Save

Customer Contact Briefcase



Ximple Solutions

Customer Contact List

10/12/2009
15:39:43
User Guide

Customer Contact List(P0201)				
Custar Electrics				
Contact Name	Contact Type	Job Title	Phone	Fax
James Rover	Shipping Contact			
John S Smith	Accounts Payable	Manager	(301) 123-4567 (Work)	
Margot Smith	Account Receivable	Administrator	(301) 222-5555 (Fax)	(301) 222-5555

View

Edit

Briefcase

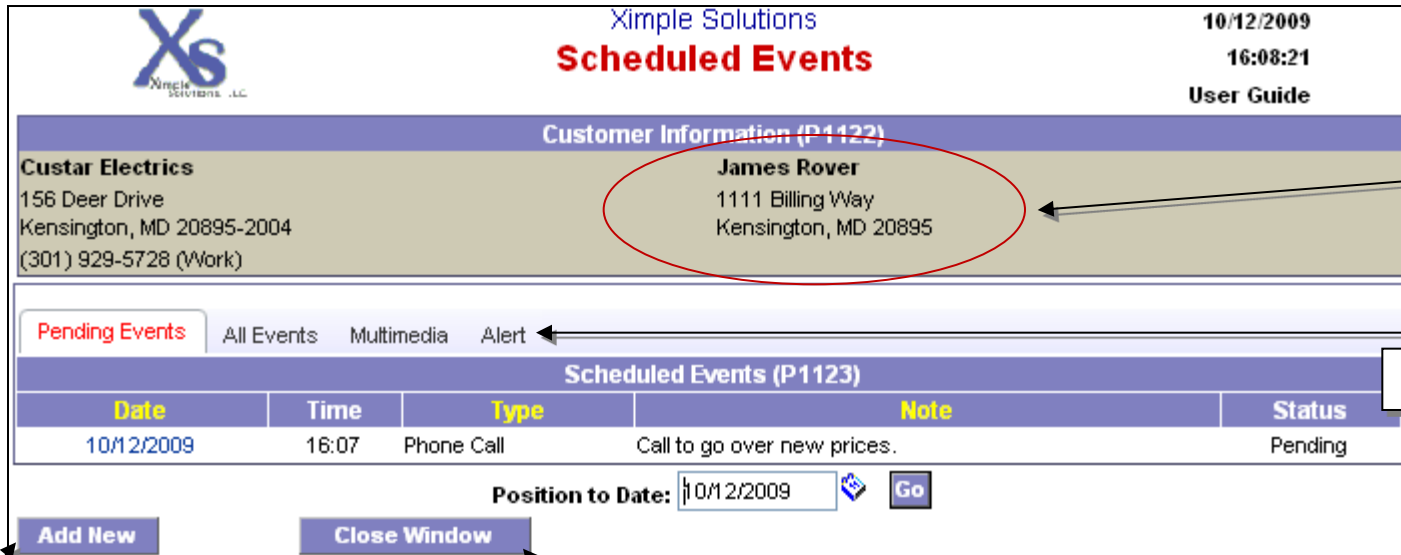
Position To Contact Name: Go

Add New
Close Window

Select Briefcase

- Briefcase for the selected customer contact.
- Information (events/tasks/multimedia files) for the contact will be setup and maintained from here.
- Events assigned to the contact will also appear in the **Briefcase to Do** of the employee being assigned the event.
- Pending events should be closed from the assigned employee's **Briefcase to Do**.

Customer Contact Briefcase



Ximple Solutions
Scheduled Events

10/12/2009 16:08:21
User Guide

Customer Information (P1122)



Custar Electric
156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (Work)

James Rover
1111 Billing Way
Kensington, MD 20895

Pending Events | All Events | Multimedia | Alert

Scheduled Events (P1123)

Date	Time	Type	Note	Status
10/12/2009	16:07	Phone Call	Call to go over new prices.	Pending

Position to Date: 10/12/2009  

Add New **Close Window**

Owner of
Briefcase

Tabs: Select to View


Click
Add New

Return to
Customer
Contact List
Page

Customer Contact Briefcase Tasks

- Schedule an Event
- Close an Event
- Customer Contact Multimedia
- Add Customer Contact Multimedia

Schedule an Event



Ximple Solutions
Scheduling a New Event

10/12/2009
16:07:21
User Guide

Customer Information (P1122)	
Custar Electronics 156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (VWork)	James Rover 1111 Billing Way Kensington, MD 20895

Scheduling a New Event (P1124)	
*Event Type	Phone Call v
*Date / Time	10/12/2009 16:07
*Assign To	Jane Doe v
*Event Status	Pending v
Note	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> Call to go over new prices. </div> <div style="text-align: right; font-size: small;"> ↑ ↓ </div>
473 characters remaining on your input limit	
<div style="display: flex; justify-content: space-around; margin-top: 10px;"> Save Save & Add Multimedia Reset Cancel </div>	


- Employee assigned to the event
- Event will appear in the employee's Briefcase to Do

Click
Save

Schedule the
Event & Attach a
Multimedia File

Close an Event

- This Event is being closed from the Contact's own Briefcase.



Scheduled Events

10/12/2009 16:08:21 User Guide

Customer Information (P1122)


Custar Electronics
156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (Work)

James Rover
1111 Billing Way
Kensington, MD 20895

Pending Events All Events Multimedia Alert

Date	Time	Type
10/12/2009	16:07	Phone Call

Add New Close Window



Scheduled Event Findings

10/12/2009 16:12:43 User Guide

Customer Information (P1122)

Custar Electronics
156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (Work)

James Rover
1111 Billing Way
Kensington, MD 20895

Event Findings (P1121)

Event Type Phone Call
Date / Time 10/12/2009 16:11
Assigned To Jane Doe
Event Status Pending

Note
 Call to go over new prices.
 - Talked to James and will be sending over new price list next week.
 403 characters remaining on your input limit

Follow-up ☒ Yes ☐ No
Multimedia Price List


Close Event Reset Cancel

Click **Event Date**

Click **Close Event**

Customer Contact Multimedia

Popup
Menu



Ximple Solutions
Scheduled Events

10/12/2009
16:16:05
User Guide

Customer Information (P1122)

Custar Electric
156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (VWork)

James Rover
1111 Billing Way
Kensington, MD 20895

Pending Events
All Events
Multimedia
Alert

	Description	Catalog Type	MIME Type	Size	View
Price List		Word Document	text/plain	0 kb	Link to image

Add New

View
Edit
Edit Description
Delete

Close Window

Multimedia Tab

Click **Add New**

Popup Menu:


View: Open multimedia file.

Edit: Edit file (upload new file).

Edit Description: Edit description of file.

Delete: Delete file from system.

Add Customer Contact Multimedia File



Ximple Solutions
Scheduled Events

10/12/2009
16:16:50
User Guide

Customer Information (P1122)	
Custar Electrics 156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)	James Rover 1111 Billing Way Kensington, MD 20895

Pending Events All Events **Multimedia** Alert


New Multimedia Entry

*Multimedia Catalog Type	Word Document
*Description	Price List Oct 2009
*Upload Files	C:/PL/2009/Oct.pdf <input type="button" value="Browse..."/>

Click
Save

Browse
Computer for
Multimedia File

Customer Contact Alerts



Ximple Solutions
Entity Alerts

10/12/2009
16:37:24
User Guide

Customer Information (P1122)

Custar Electric
156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (Work)

James Rover
1111 Billing Way
Kensington, MD 20895

Pending Events All Events Multimedia **Alert**

Entity Alerts


Type		Eff. Date	Exp. Date
Dispatch	James requires duplicate SO copy		

Add New Close Window

Alert Tab

Click **Add New**

Customer Contact Alerts



Add New Alert

10/12/2009
16:33:07
User Guide

Customer Information (P1122)	
Custar Electrics 156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)	James Rover 1111 Billing Way Kensington, MD 20895

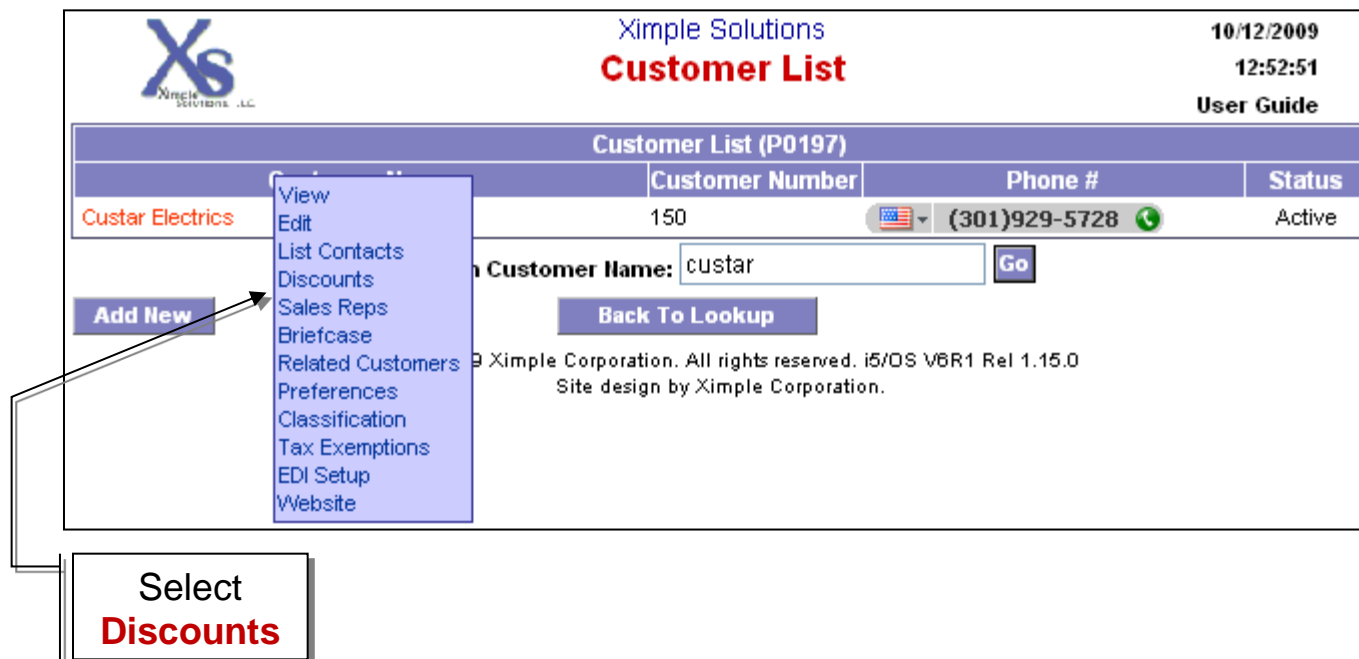
Add New Alert

Alert Type	Dispatch
Eff Date	<input type="text"/>
Exp Date	<input type="text"/>
Message	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> James requires duplicate SO copies. </div> <div style="text-align: right; margin-top: -10px;"> </div>

221 characters remaining on your input limit

Click **Save**

Open Customer Discounts List Page



Xs Ximple SOLUTIONS, LLC

Ximple Solutions
Customer List

10/12/2009
12:52:51
User Guide

Customer List (P0197)

	Customer Number	Phone #	Status
Custar Electrics	150	(301)929-5728	Active

Customer Name:

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Select Discounts

Customer Discount List Page

Ximple Solutions 10/12/2009 17:33:44
Customer Discount List User Guide

Customer Discount List(P0205)
 Custar Electrics

Effective Date	Expiration Date	Days prior to due date	Discount Rate(%)
01/01/2009	Delete	25	5.00
10/12/2009		5	1.00

[Add New](#) [Close Window](#)

Click **Add New**

Ximple Solutions 10/12/2009 17:32:17
Add Customer Discounts User Guide

Add Customer Discounts(P0206)
 Customer: Custar Electrics

*Days prior to due date

*Discount Rate (%)


*Effective Date [Calendar](#)

Expiration Date [Calendar](#)

[Save](#) [Reset](#) [Cancel](#)

Click **Save**



Open Customer Sales Rep List Page



Ximple Solutions
Customer List

10/12/2009
12:52:51
User Guide

Customer List (P0197)

	Customer Number	Phone #	Status
Custar Electrics	150	 (301)929-5728 	Active

Customer Name:

View
Edit
List Contacts
Discounts
Sales Reps
Briefcase
Related Customers
Preferences
Classification
Tax Exemptions
EDI Setup
Website

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Select
Sales Reps

Customer Sales Rep List

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Customer Sales Rep List

Custar Electrics						
	Edit	Rep	Primary	Commission %	From Date	To Date
Jane Doe	Delete		Yes	10.00	01/01/2006	

Add New **Close Window**

Click **Add New**

Xs Ximple Solutions LLC 10/12/2009 17:44:11 User Guide


New Customer Sales Rep

Customer	Custar Electrics		
*Sales Person	Jane Doe		V
*Primary	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Commission %	<input type="text"/>		
From Date	<input type="text"/>		
To Date	<input type="text"/>		

Save **Reset** **Cancel**

Click **Save**

Open Customer Briefcase





Ximple Solutions

Customer List

10/12/2009

12:52:51

User Guide

Customer List (P0197)			
	Customer Number	Phone #	Status
Custar Electrics	150	 (301)929-5728 	Active

Add New

Customer Name: **Go**

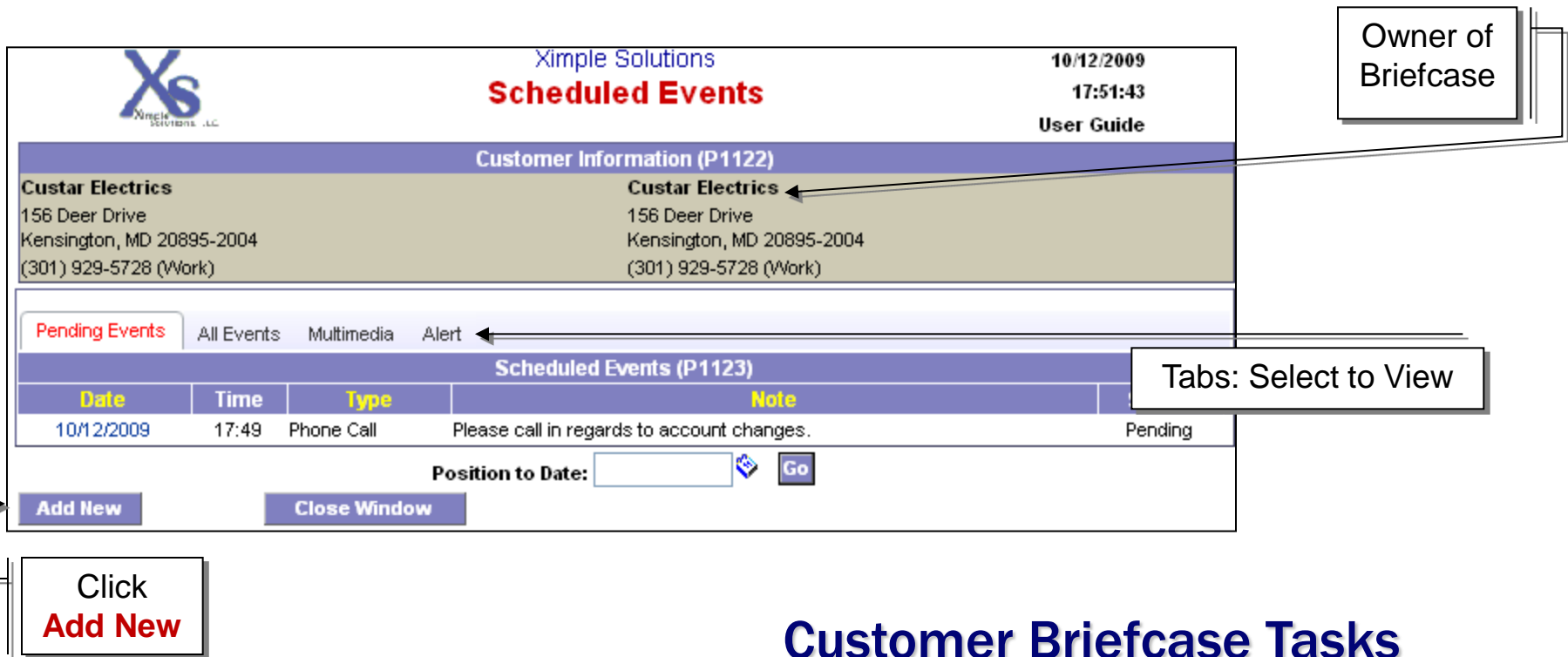
Back To Lookup

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Select
Briefcase

Customer Briefcase



The screenshot shows the Ximple Solutions Customer Briefcase interface. At the top, the Ximple logo is on the right. The main header area contains the Ximple Solutions logo, the title "Scheduled Events", and the date/time "10/12/2009 17:51:43" with a "User Guide" link. Below this is a "Customer Information (P1122)" section for "Custar Electronics", showing the address "156 Deer Drive, Kensington, MD 20895-2004" and phone number "(301) 929-5728 (VWork)". To the right of this section is a callout box labeled "Owner of Briefcase". Below the customer information is a "Scheduled Events (P1123)" section. It features a tabbed interface with "Pending Events" selected. Below the tabs is a table of scheduled events. A callout box labeled "Tabs: Select to View" points to the tabs. Below the table is a "Position to Date:" field with a "Go" button. At the bottom left are "Add New" and "Close Window" buttons. A callout box labeled "Click Add New" points to the "Add New" button.

Customer Information (P1122)

Custar Electronics
 156 Deer Drive
 Kensington, MD 20895-2004
 (301) 929-5728 (VWork)

Scheduled Events (P1123)

Date	Time	Type	Note	
10/12/2009	17:49	Phone Call	Please call in regards to account changes.	Pending

Position to Date:

Click Add New

Owner of Briefcase


Tabs: Select to View

Customer Briefcase Tasks

- Schedule an Event
- Close an Event
- Customer Multimedia
- Add Customer Multimedia

Schedule an Event

- Employee assigned to the event
- Event will appear in the employee's Briefcase to Do



Ximple Solutions

Scheduling a New Event

10/12/2009
17:49:58
User Guide

Customer Information (P1122)	
Custar Electrics	Custar Electrics
156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)	156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)


Scheduling a New Event (P1124)	
*Event Type	Phone Call <input type="button" value="v"/>
*Date / Time	10/12/2009 <input type="button" value="c"/> 17:49
*Assign To	Jane Doe <input type="button" value="v"/>
*Event Status	Pending <input type="button" value="v"/>
Note	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">Please call in regards to account changes.</div> <div style="text-align: right; font-size: small;"> <input type="button" value="up"/> <input type="button" value="down"/> </div>
458 characters remaining on your input limit	
<input type="button" value="Save"/> <input type="button" value="Save & Add Multimedia"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>	

Click **Save**

Schedule the Event & Attach a Multimedia File

Close an Event

- This Event is being closed from the Customer's own Briefcase.



Scheduled Events

10/12/2009 17:51:43

User Guide

Customer Information (P1122)


Custar Electronics

156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (Work)

Pending Events All Events Multimedia Alert

Date	Time	Type	Position
10/12/2009	17:49	Phone Call	Please

Add New Close Window



Scheduled Event Findings

10/12/2009 17:54:29

User Guide

Customer Information (P1122)

Custar Electronics

156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (Work)

Event Findings (P1121)

Event Type Phone Call

Date / Time 10/12/2009 17:49

Assigned To Jane Doe

Event Status Pending

Note Please call in regards to account changes. - Talked to Ruth, need to schedule a meeting to go over changes in person.

383 characters remaining on your input limit

Follow-up ☒ Yes ☐ No


Multimedia New Contract Oct 2009

Close Event Reset Cancel

Click Event Date

Click Close Event

Customer Multimedia



Ximple Solutions

Scheduled Events

10/12/2009

17:56:50

User Guide

Customer Information (P1122)

<p>Custar Electrics</p> <p>156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)</p>	<p>Custar Electrics</p> <p>156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)</p>
--	--

Pending Events
All Events
Multimedia
Alert

Media	Catalog Type	MIME Type	Size	View
<p>New Contract Oct 2009</p> <p style="background-color: #d0d0d0; padding: 2px 5px; margin-top: 5px;">Add New</p>	Word Document	text/plain	0 kb	<p>View</p> <p>Edit</p> <p>Edit Description</p> <p>Delete</p>

Close Window

Tabs: Select
'Multimedia'

Click **Add New**

Popup Menu:


View: Open multimedia file.

Edit: Edit file (upload new file).

Edit Description: Edit description of file.

Delete: Delete file from system.

Add Customer Multimedia File



Ximple Solutions
Scheduled Events

10/12/2009
17:56:50
[User Guide](#)

Customer Information (P1122)

Custar Electrics 156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)	Custar Electrics 156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)
---	---

Pending Events
All Events
Multimedia
Alert


New Multimedia Entry

*Multimedia Catalog Type	Word Document ▼
*Description	Price List 2009
*Upload Files	<div style="display: flex; align-items: center;"> <input style="flex-grow: 1;" type="text" value="C:/PL/20009/Oct.pdf"/> <input type="button" value="Browse..."/> </div>

Click
Save

Browse
Computer for
Multimedia File

Customer Alerts



Ximple Solutions
Entity Alerts

10/12/2009
18:00:45
User Guide

Customer Information (P1122)

Custar Electrics
156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (VWork)

Custar Electrics
156 Deer Drive
Kensington, MD 20895-2004
(301) 929-5728 (VWork)

Pending Events All Events Multimedia **Alert**

Entity Alerts


Type	Messa	Edit	Eff. Date	Exp. Date
Sales Order	Payment Must be Received at time of SO	Delete		

Add New Close Window

Alert Tab

Click **Add New**

Customer Alerts



Add New Alert

10/12/2009
18:02:29
User Guide

Customer Information (P1122)	
Custar Electrics 156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)	Custar Electrics 156 Deer Drive Kensington, MD 20895-2004 (301) 929-5728 (Work)

Add New Alert

Alert Type
Eff Date
Exp Date
Message

Dispatch ▼


S&H is waived if Customer picks up order.

215 characters remaining on your input limit

Save
Reset
Cancel



Click **Save**

Open Related Customers List Page



Ximple Solutions
Customer List

10/12/2009
12:52:51
User Guide

Customer List (P0197)			
	Customer Number	Phone #	Status
Custar Electrics	150	 (301)929-5728 	Active

Add New

View
Edit
List Contacts
Discounts
Sales Reps
Briefcase
Related Customers
Preferences
Classification
Tax Exemptions
EDI Setup
Website

Customer Name:

Back To Lookup

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Select
**Related
Customers**

Related Customers List Page

Ximple Solutions 10/12/2009 18:06:12 User Guide

Related Customers List

Related Customers List(P0191)

Custar Electrics

	View	Customer Name	Phone	Status
Orbelle 00	Delete		(301) 888-9999 (Work)	Active

Position To Customer Name:

Click **Add New**

Popup Menu:

View: View related customer's address book.

Delete: Delete related customer from customer's list

Ximple Solutions 10/12/2009 18:18:47 User Guide

New Related Customer

New Related Customer(P0192)

Customer	Custar Electrics
*Related Customer	Orbelle 00 <input type="button" value="v"/>

Click **Save**

Note:

A customer can be related to only one other customer

Open Customer Preferences Page



The screenshot shows the 'Customer List' page in the Ximple Solutions application. At the top, the header includes the Ximple logo, the text 'Ximple Solutions Customer List', the date '10/12/2009', the time '12:52:51', and a 'User Guide' link. Below the header is a table titled 'Customer List (P0197)'. The table has columns for 'Customer Name', 'Customer Number', 'Phone #', and 'Status'. One customer is listed: 'Custar Electrics' with Customer Number '150' and Phone Number '(301)929-5728'. A context menu is open over the 'Custar Electrics' row, listing options: View, Edit, List Contacts, Discounts, Sales Reps, Briefcase, Related Customers, Preferences, Classification, Tax Exemptions, EDI Setup, and Website. An arrow points from a box labeled 'Select Preferences' to the 'Preferences' option in the menu. Below the table, there is a search bar with 'Custar' entered and a 'Go' button, and a 'Back To Lookup' button. At the bottom, a footer contains copyright information: '© Ximple Corporation. All rights reserved. i5/OS V6R1 Rel 1.15.0 Site design by Ximple Corporation.'

Customer List (P0197)


Customer Name	Customer Number	Phone #	Status
Custar Electrics	150	(301)929-5728	Active

Search Customer Name:

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Select Preferences

Customer Preferences Page



Customer Preferences

10/12/2009
18:20:05
User Guide

Customer Preferences(P0193)
Custar Electrics

Statement Preferences

Statement Type	Balance Forward	Statement Consolidation	Yes <input type="radio"/> No <input checked="" type="radio"/>	
# of Invoices Copies	1	EDI Capable	Yes <input checked="" type="radio"/> No <input type="radio"/>	
# of Packing Slip Copies	1	Price Packing Slip	Yes <input checked="" type="radio"/> No <input type="radio"/>	
Charge Restocking Fee	Yes <input checked="" type="radio"/> No <input type="radio"/>	Print Long Description	Yes <input type="radio"/> No <input checked="" type="radio"/>	
Past Due Format				
Current Due Format				
Future Due Format				

	Email	Fax	Snail Mail	EDI	Email	Fax
Statement	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Quote	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Shipping Preferences

Shipping Method	UPS Ground	Freight Code		
Bill Freight	Yes <input checked="" type="radio"/> No <input type="radio"/>	Default Freight Amt.	2.000000	
Allow Direct Shipments	Yes <input checked="" type="radio"/> No <input type="radio"/>	Bar Code Required	Yes <input type="radio"/> No <input checked="" type="radio"/>	Job Marking Required
Default Shipping Instructions	<div style="border: 1px solid black; height: 40px; width: 100%;"></div>			

255 characters remaining on your input limit

Form Continues
on Next Slide

Can be Snail Mail and ONE of three: Email, Fax or EDI


Customer Preferences Page

Continued from
Previous Slide

Credit Preferences			
Preferred Payment Method	On Account	Preferred Fulfillment Method	Availability
Force Cash Payment	Yes <input type="radio"/> No <input checked="" type="radio"/>	Accept Checks	Yes <input checked="" type="radio"/> No <input type="radio"/>
Credit Limit	100000.00	Credit On Hold	Yes <input type="radio"/> No <input checked="" type="radio"/>
Temp. Credit Limit	0.00	Temp. Credit Limit Exp. Date	
Aged Dollar Amount	0.00	Aged Credit Authorization # of Days	0
Month End Cutoff Day	15		
Ordering Options Preferences			
Emergency Back Orders	Yes <input checked="" type="radio"/> No <input type="radio"/>	PO Required	Yes <input type="radio"/> No <input checked="" type="radio"/>
Min. Order Code		Min. Order Amount	0.00
Service Preferences			
Min. Service Charge	0.00	Service Charge Forgiveness Amount	0.00
EDI Information			
*Customer Trading Partner ID	123-565		
*Customer Group ID	454-898		
*Network	Verizon : FTP : 21		
		Save	Reset
		Cancel	

Click **Save**

Open Customer Classification Page



Ximple Solutions
Customer List

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User Guide

Customer List (P0197)

Customer Name	Customer Number	Phone #	Status
Custar Electrics	150	(301)929-5728	Active

Add New

Back To Lookup

Customer Name: **Go**

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Select Classification

Assign Customer Classification Page

Assigned Classification



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Assign Customer Classifications

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Assign Customer Classifications(P0185)	
Custar Electrics	
Manufacturer	Medium

Assign A Classification to Custar Electrics

*Classification

Reseller

Wholesale

V

Save
Reset
Cancel

Save

Classification
Type

Assigned
Classification

Open Customer Tax Exemption Page



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Customer List

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User Guide

Customer List (P0197)

Customer Name	Customer Number	Phone #	Status
Custar Electrics	150	(301)929-5728	Active

Add New

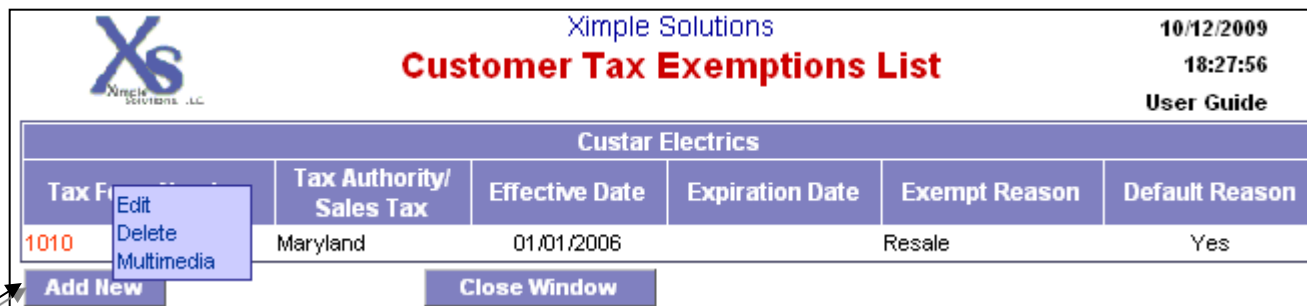
Back To Lookup

Customer Name: **Go**

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Select Tax Exemptions

Customer Tax Exemptions List Page



Custar Electrics					
Tax Form Number	Tax Authority/Sales Tax	Effective Date	Expiration Date	Exempt Reason	Default Reason
1010	Maryland	01/01/2006		Resale	Yes

Buttons: Add New, Close Window

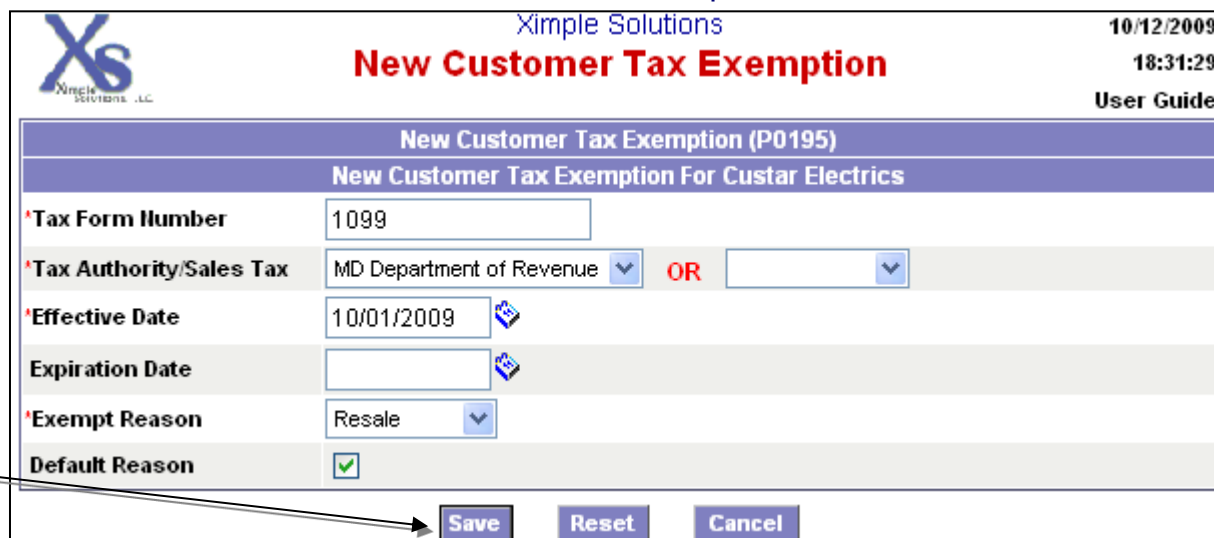
Popup Menu:

Edit: Edit exemption (Number, Effective-Expiration Dates, Exempt Reason, Default Reason).

Delete: Delete exemption from customer's list.

Multimedia: Add multimedia file to exemption.

Click **Add New**



New Customer Tax Exemption (P0195)

New Customer Tax Exemption For Custar Electrics

*Tax Form Number: 1099

*Tax Authority/Sales Tax: MD Department of Revenue OR

*Effective Date: 10/01/2009

Expiration Date:

*Exempt Reason: Resale

Default Reason: ☒

Buttons: Save, Reset, Cancel

Click **Save**

Tax Exemption Multimedia

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Customer Tax Exemption Multimedia

Customer	Tax Form Number	Tax Authority/Sales Tax	Effective Date	Expiration Date
Custar Electronics	1010	Maryland	01/01/2006	

Description	Catalog Type	MIME Type	Size	View
Form 1010	Word Document	text/plain	0 kb	Link to image

Form 1010 View Edit Edit Description Delete

Add New Close Window

Click **Add New**

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Customer Tax Exemption Multimedia

Customer	Tax Form Number	Tax Authority/Sales Tax	Effective Date	Expiration Date
Custar Electronics	1010	Maryland	01/01/2006	

New Multimedia Entry

***Multimedia Catalog Type** Word Document

***Description** Form 1010


***Upload Files** C:/Forms/Tax/MD/1010.pdf [Browse...](#)

Save **Reset** **Cancel**

Close Window



Click **Save**

Open Customer Website Page



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Customer List

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[User Guide](#)

Customer List (P0197)			
	Customer Number	Phone #	Status
Custar Electrics	150	 (301)929-5728 	Active

Add New

View
Edit
List Contacts
Discounts
Sales Reps
Briefcase
Related Customers
Preferences
Classification
Tax Exemptions
EDI Setup
Website

Customer Name:

Back To Lookup

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Select
Website

Entity Website List Page




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Entity Website List

Custar Electronics			
Website	Website URL	User Name	User Password
Custar Electronics	www.custarelectricsltd.net	rigeelectrical	rigel0067

Edit
Delete
Assign Employee

Add New
Close Window

Click **Add New**

Popup Menu:

Edit: Edit website info (Website Name, URL, User Name, Password)

Delete: Delete website from customer's list.

Assign Employee: Assign employee to website (website info will appear in Employee's **Briefcase To Do** under the **Websites** tab).

Click **Save**




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Add Entity Website

Custar Electronics	
*Website Name	<input type="text" value="Custar Electronics"/>
*Website URL	<input type="text" value="http://www.custarelectricalllc.com"/>
User Name	<input type="text" value="ximplesol"/>
Password	<input type="text" value="XIMPLESOL"/>

Save
Reset
Cancel

Assign Employee to Website

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Entity Website List

Website	Website URL	User Name	User Password
Custar Electrics	www.custarelectricsltd.net	rigeelectrical	rigel0067

[Edit](#) [Delete](#) [Assign Employee](#)

[Add New](#) [Close Window](#)

Select 'Assign Employee'

Select Employee to Assign

Assign Employee

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Assign Employee To Website

Assign Employee	
Entity	Custar Electrics
Website	Custar Electrics
Employee	Jane Doe <input type="button" value="v"/>
<input type="button" value="Save"/>	

Employee

User Guide

[Back](#)

Assigned Employees

END Customer Setup Overview