

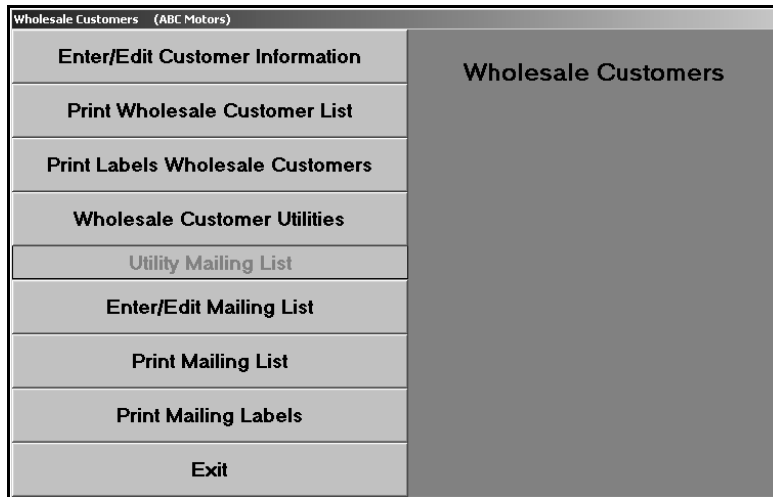
## Chapter 5 Wholesale Customers

You can create a database of wholesale customers. As you enter the wholesale customers in the system, you assign the customer wholesale pricing levels (as defined using the **Wholesale Pricing Levels** button in the Parts Inventory System Setup). When you select to generate a counter ticket for an existing wholesale customer, the system automatically pulls the customer’s pricing information and uses it to calculate the parts prices for the sale. This save you the trouble of having to manually figure the discount for each customer.

### Accessing the Wholesale Customers Menu

You enter wholesale customers using the Wholesale Customers menu in the Special Inventories area of the Parts Inventory module. In addition to entering customers, this menu provides options that allow you to print wholesale customer lists and mailing labels and generate mailing lists.

1. Click **Special Inventories** on the Parts Inventory menu. The Special Inventories & Maintenance menu appears.
2. Click **Wholesale Customers**. The Wholesale Customers menu appears.



## Enter/Edit Customer Information

Use this button to enter wholesale customers. If you are integrated with the Accounting module, you can access the accounts receivable customer information entered into the system. All you have to do is enter any additional wholesale information. If you are not integrated with Accounting, you will have to manually enter the wholesale customers.

## Pulling Customer Information from the Accounting Program

If you are integrated with the Accounting program, you can pull customer information instead of having to manually enter all of the information.

1. In **Customer No.**, type the customer number.

You can also search for a customer by clicking **List**. Press the letter on your keyboard that corresponds with the letter of the customer's last name/prominent name. A list of customers whose name begins with that letter appears. Click the customer in the list whose information you want to view.

2. The customer's information fills in on the screen.
3. Enter any additional information.
4. The fields under **Purchases** appear based on the Operating Parameters set in the Dealership Accounting module. If the Accounting Department restricts the Parts Department from having access to the accounts receivable balances, these fields will not appear on this screen. The system automatically updates the fields at the bottom of the screen as sales and payments are posted to the customer's account.
5. The **Account Balance** fields under **Purchases** display the account balance and break the balance into the appropriate aging categories.
6. Click **Save** to save the information.

## Manually Entering Customers

If you are not integrated with the Accounting module, or a customer has not been entered in the Accounting module, you must manually enter all of the customer's information.

1. In **Customer No.**, type the customer number you want to assign the customer. Be sure that you use the same numbering system the Accounting Department uses to assign customer numbers. Autosoft recommends using the first four letters of the customer's last/prominent name and the first two numbers of the customer's address (or telephone number, etc.). For example, Steve Smith who lives on 555 Main Street would be assigned a customer number of SMIT55.
2. In **Name**, type the customer's name.
3. Next, type the customer's street address, city, state, and ZIP Code/Postal Code.
4. Use the **Memo** field to type any additional information about the customer that needs to be entered. The memo will display on the Counter Parts Sales screen. This field holds up to 30 characters.
5. Type the customer's phone number and fax number.
6. In **Temp/Perm/Ref (T/P/R)**, type the letter that corresponds to the type of account.
  - Type **T** for temporary. A temporary account is automatically deleted one month after the balance reaches zero.
  - Type **P** for permanent. A permanent account remains in the system permanently, regardless of the balance or activity.
  - Type **R** for reference. A reference account remains in the system permanently, regardless of the balance or activity.
7. Use the **Taxable** field to indicate if the customer's parts purchases can be taxed. Tax rates for parts sales are set for each inventory source using the **Operating Defaults** option in the Parts Inventory System Setup. You can set four default tax rates: 1A, 1B, 1C, and 2.
  - Type **A** to apply Tax Rate 1A *and* Tax Rate 2.
  - Type **B** to apply Tax Rate 1B *and* Tax Rate 2.
  - Type **C** to apply Tax Rate 1C *and* Tax Rate 2.
  - Type **Y** for yes. This applies both Tax Rate 1 *and* Tax Rate 2. Rate **A** is the default tax rate used when Tax Rate 1 is selected.
  - Type **1** if you want to apply *only* Tax Rate 1.
  - Type **2** if you want to apply *only* Tax Rate 2.
  - Type **N** for no. No tax is applied to the customer's purchase.

If the customer is eligible for a tax rate other than the rates associated with the default tax rates set in the Operating Parameters, type the rate that needs to be used for this customer in the **Special Tax Rate** field, and the system will use this value to calculate the tax. The rate entered in this field will *always override* any other setting. Make sure A, B, C, Y, 1, or 2 appears in the **Taxable** field to ensure the system will calculate tax.

8. If the customer is eligible for a special tax rate, type the code that identifies why the customer qualifies for the tax set in the **Tax Code** field. The code prints on sales tax reports.

9. If the customer is tax exempt, type the customer's tax ID in the **Tax ID** field.
10. In **Classification**, type the customer classification code you want to use for this customer. Customer classifications are codes such as D for Dealer, E for employee, or W for wholesale. You created these classifications using the **Wholesale Pricing Levels** button on the System Setup & Updates menu. See Chapter 1 for more information on customer classifications.
11. In **Wholesale Level**, type the wholesale level you want to use for this customer. Wholesale pricing levels can be 1 through 4 and correspond to up to four pricing tiers. You created pricing levels using the **Wholesale Pricing Levels** button on the System Setup & Updates menu. See Chapter 1 for more information on wholesale pricing levels.
12. Use the **Credit Limit** field to specify the customer's credit limit. The system will prompt the user when the credit limit is reached
13. Use the **Wholesale Comp** field to indicate if this customer is eligible for wholesale compensation. Type **Y** for yes or **N** for no. If you type **Y** in this field, type the customer's wholesale compensation code in the **Wholesale Comp Code** field. This is required if you participate in the OEM wholesale compensation program. When the counter sale is processed, this information is pulled to the WINS/Comp report file as the Fleet Customer Type.
14. In **Distance To Deliver**, type the mileage required to deliver to this customer. This may be useful when determining the customer's discount.
15. The fields under **Purchases** appear based on the Operating Parameters set in the Dealership Accounting module. If the Accounting Department restricts the Parts Department from having access to the accounts receivable balances, these fields will not appear on this screen. The system automatically updates the fields at the bottom of the screen as sales and payments are posted to the customer's account.
16. The **Account Balance** fields under **Purchases** display the account balance and break the balance into the appropriate aging categories.
17. Click **Save** to save the information.

**Tip:** Use the **Memo Data** button to record memo information for the customer. The memo information is available for viewing when creating generating counter slips. This block holds up to 512 characters. Click **Save** to save the information.

## Print Wholesale Customer List

Use this button to print a list of the wholesale customers. For each wholesale customer, the printout lists the customer's customer number, name, address, phone number, classification, and wholesale level. It also lists the total of monthly purchases and year-to-date purchases, as well as the date of the last purchase.

1. Click **Print Wholesale Customer List**.
2. When prompted to verify your printer is ready, select your print criteria.

## Print Labels Wholesale Customers

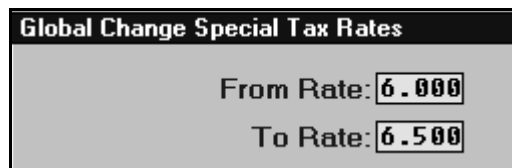
Use this button to print mailing labels for all of the wholesale customers.

1. Click **Print Labels Wholesale Customers**.
2. When prompted to verify your printer is ready, select your print criteria.

## Wholesale Customer Utilities

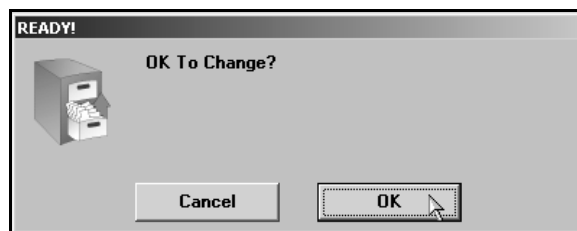
This button advances you to the Wholesale Customer Utilities menu. Currently, you can only use this menu to change the special tax rate. This allows you to replace one tax rate with another tax rate. The system will find each wholesale customer file that has been assigned the old rate and replace the rate with the new rate you specify. This saves you the trouble of having to manually edit each customer's file.

1. Click **Wholesale Customer Utilities**. The wholesale Customer Utilities menu appears.
2. Click **Global Change Special Tax Rates**.
3. Type the original tax rate in **From Rate**.
4. Type the new tax rate in **To Rate**.



The screenshot shows a dialog box titled "Global Change Special Tax Rates". It contains two input fields: "From Rate" with the value "6.000" and "To Rate" with the value "6.500".

5. Click **OK** when prompted to verify you want to change the rate.



6. Click **Exit** to return to the Wholesale Customers menu.

## Enter/Edit Mailing List

Use this button to open the Utility Mailing List screen to *manually* create a list of names that can be used to print mailing lists and labels. You assign each customer a class (body shop, garage, dealers, retail outlet, etc.). You can then use the entire list or a selected class to print lists and labels for marketing purposes. Since you are manually adding customers to this list, you do not have to edit the entire A/R account database, so you have more control over which customers appear on each list and on the labels you print.



The screenshot shows a window titled "Utility Mailing List (ABC Motors)". Inside the window, there is a form titled "Utility Mailing List" with the following fields and values:

- Customer Number: SMIT55
- Class: A
- Name: STEVE SMITH
- Addr: 555 MAIN STREET
- City: WEST MIDDLESEX State: PA ZIP: 16159
- Attn.: STEVE
- Phone: 724 555 1234

At the bottom of the form, there are four buttons: "Exit", "Search", "Delete", and "Save".

### Adding a New Customer to the Mailing List

1. In **Customer Number**, type the customer number you want to assign this customer. Use the first four letters of the customer's last/prominent name and the first two numbers of the customer's address (or telephone number, etc.).
2. In **Class**, type the classification you want to assign this customer. This classification separates the customers into different lists so you can print lists and labels based on the classification.
3. In **Name**, type the customer's name.
4. Next, type the customer's street address, city, state, and ZIP Code/Postal Code.
5. In **Attn**, type the name that should print on the salutation line of mailers sent to this customer.
6. Type the customer's phone number.
7. Click **Save** to save the information.

### **Pulling a Wholesale Customer to the List**

1. Type the customer number in the **Customer Number** field.
2. The customer's information fills in on the screen.
3. In **Class**, type the classification you want to assign this customer. This classification separates the customers into different lists so you can print lists and labels based on the classification.
4. In **Attn**, type the name that should print on the salutation line of mailers sent to this customer.
5. Click **Save** to save the information.

### **Recalling Customers on the Generated List**

1. Click **Search**.
2. Press the letter on the keyboard that corresponds with the customer's last name/prominent name.
3. A list of customers that have been added to the list whose last name begins with the letter is displayed.
4. Click the customer you want to select.
5. The customer's information fills in on the screen.

### **Deleting a Customer from the List**

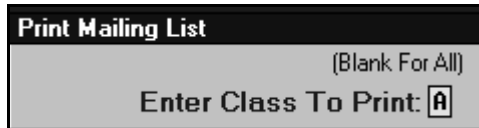
This only removes the customer from the utility mailing list. This does not delete the customer from the system.

1. Select the customer.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

## Print Mailing List

Use this button to print the utility mailing list. This is the list you created using the **Enter/Edit Mailing List** button. You have the option of printing the list for a specific classification.

1. Click **Print Mailing List**.
2. Type the classification you want to use for the list. If you want to print a list of all of the customers, leave the field blank, and press ENTER.



Print Mailing List

(Blank For All)

Enter Class To Print:

3. When prompted to verify your printer is ready, select your print criteria.

## Print Mailing Labels

Use this button to print labels for customers on the utility mailing list. This is the list you created using the **Enter/Edit Mailing List** button. You have the option of printing labels for a specific classification.

1. Click **Print Mailing Labels**.
2. Type the classification you want to use for the list. If you want to print a list of all of the customers, leave the field blank, and press ENTER.
3. When prompted to verify your printer is ready, select your print criteria.