

# Customer Data Worksheets

Data entry is strongly recommended, or required by the system, for the fields displayed in **bold** type.

## Add Corporate screen

**Customer Corporate Number** (6,n) \_\_\_\_\_ **Corporate Type** (I/C) \_\_\_\_\_  
Controlled By Corp # (6,n) \_\_\_\_\_  
Level Code (1,a) \_\_\_\_\_  
**Name** (35,a) \_\_\_\_\_ Branch Code (6,a) \_\_\_\_\_  
**Addr 1** (30,a) \_\_\_\_\_  
Addr 2 (30,a) \_\_\_\_\_  
Addr 3 (30,a) \_\_\_\_\_ Country Code (3,a) \_\_\_\_\_  
**City** (30,a) \_\_\_\_\_ **State** (2,a) \_\_\_\_\_ **Zip** (5-9,n) \_\_\_\_\_  
Phone No (10,n) \_\_\_\_\_ Inter Dialing (3,n) \_\_\_\_\_  
Fax Phone (10,n) \_\_\_\_\_ Account Rep Sales (6,a) \_\_\_\_\_ Statement Code (2,a) \_\_\_\_\_  
Dataline (10,n) \_\_\_\_\_ Account Rep A/R (6,a) \_\_\_\_\_ Password (8,a) \_\_\_\_\_

Corporate Contacts (30,a)	Corporate Titles (30,a)
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____

Email (70,a) \_\_\_\_\_  
Email (70,a) \_\_\_\_\_

## Edit Customer Page 1 screen

**Customer Number** (6,n) \_\_\_\_\_ **Corporate Number** (6,n) \_\_\_\_\_

Store Number (6,n) \_\_\_\_\_

**Customer Name** (35,a) \_\_\_\_\_

**Address Line 1** (30,a) \_\_\_\_\_

Address Line 2 (30,a) \_\_\_\_\_

Address Line 3 (30,a) \_\_\_\_\_

**City** (30,a) \_\_\_\_\_ **St.** (2,a) \_\_\_\_\_

**Zip Code** (5-9,n) \_\_\_\_\_ **Phone #** (10,n) \_\_\_\_\_

**Tax Jurisdiction** (6,a) \_\_\_\_\_ **Branch Code** (6,a) \_\_\_\_\_ **G/L Code** (6,a) \_\_\_\_\_

**BillTo Code** (1,a) \_\_\_\_\_ **Late Charge Code** (Y/N) \_\_\_\_\_ **Percent:** (4.2,n) \_\_\_\_\_

**Credit Limit** (7,n) \_\_\_\_\_ **Terms Code** (3,a) \_\_\_\_\_

**Sales Group** (6,a) \_\_\_\_\_ **Marketing Rep.** (6,a) \_\_\_\_\_

**Marketing Mgr** (6,a) \_\_\_\_\_ **Marketing Dir** (6,a) \_\_\_\_\_

**Demographic Code** (4,a) \_\_\_\_\_ **Account Type** (4,a) \_\_\_\_\_

**Price Hold Days** (3,n) \_\_\_\_\_ **Authorized Item** (Y/N) \_\_\_\_\_ **Auth. U/M** (Y/N) \_\_\_\_\_

**Surcharge Override** (Y/N) \_\_\_\_\_ **Build-Up Code** (Y/N) \_\_\_\_\_

**Billing Matrix** (6,n) \_\_\_\_\_ **Retail Matrix** (6,n) \_\_\_\_\_

**Subst. Code** (1,a) \_\_\_\_\_ **Inv. Reprint Code** (1,n) \_\_\_\_\_

**Service Type** (1,a) \_\_\_\_\_ **Restk. Fee Ovr.** (Y/N) \_\_\_\_\_

**Statement Code** (2,a) \_\_\_\_\_ **Notify Price Chg.** (Y/N) \_\_\_\_\_

**Edit Customer Page 2 screen - Customer Number \_\_\_\_\_**

Contacts (30,a)	Titles (30,a)	Ext. (6,n)
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____

Inter Dialing (3,n) \_\_\_\_\_ Fax Phone (10,n) \_\_\_\_\_ Dataline Phone (10,n) \_\_\_\_\_

Store Classification(WAM) (4,n) \_\_\_\_\_ Include For USG Reporting? (Y/N) \_\_\_\_\_

Federal Tax Id (18,a) \_\_\_\_\_ State Tax Id (18,a) \_\_\_\_\_

Cigarette License (18,a) \_\_\_\_\_ Tobacco License (18,a) \_\_\_\_\_

License 3 (18,a) \_\_\_\_\_ Tax Group (1,a) \_\_\_\_\_ Password (8,a) \_\_\_\_\_

Retail Labels? (Y/N) \_\_\_\_\_ Allowance Based Retail (Y/N) \_\_\_\_\_

Frequent Mailing List (Y/N) \_\_\_\_\_ Exclude From Allowances? (Y/N) \_\_\_\_\_

Invoice Trailer Report (Y/N) \_\_\_\_\_ QDN Customer Number (6,n) \_\_\_\_\_

**Customer Start Date** (6, n) \_\_\_\_\_ Exclude From Promos? (Y/N) \_\_\_\_\_

MSA Customer Classification (1,a) \_\_\_\_\_ MSA Promotion Acceptance? (Y/N) \_\_\_\_\_

Exclude Auto Merge Orders (Y/N) \_\_\_\_\_ Cash & Carry Customer? (Y/N) \_\_\_\_\_

**Customer Extended Information screen**

Name (35,a) \_\_\_\_\_ SSN (9,n) \_\_\_\_\_

Address 1 (30,a) \_\_\_\_\_

Address 2 (30,a) \_\_\_\_\_

City (30,a) \_\_\_\_\_ State (2,a) \_\_\_\_\_ Zip (5-9,n) \_\_\_\_\_

Gender (1,a) \_\_\_\_\_ Birth Date (6,n) \_\_\_\_\_ DL# (20,n) \_\_\_\_\_ DL State (2,a) \_\_\_\_\_

Primary Email Address (70,a) \_\_\_\_\_

2nd Email Address (70,a) \_\_\_\_\_

International Postal Code (5-9,n) \_\_\_\_\_ Send Order Ack? (Y/N) \_\_\_\_\_

**Shipping Information screen**

Carrier (6,a) \_\_\_\_\_ Shipping Account (25,a) \_\_\_\_\_

**Edit Customer Page 3 screen - Customer Number \_\_\_\_\_**

Call Routes (6,a)

*Monday:* Call Route 1 \_\_\_\_\_  
*Tuesday:* Call Route 2 \_\_\_\_\_  
*Wednesday:* Call Route 3 \_\_\_\_\_  
*Thursday:* Call Route 4 \_\_\_\_\_  
*Friday:* Call Route 5 \_\_\_\_\_  
*Saturday:* Call Route 6 \_\_\_\_\_  
*Sunday:* Call Route 7 \_\_\_\_\_

Call Sequences (5,n)

Call Sequence 1 \_\_\_\_\_  
Call Sequence 2 \_\_\_\_\_  
Call Sequence 3 \_\_\_\_\_  
Call Sequence 4 \_\_\_\_\_  
Call Sequence 5 \_\_\_\_\_  
Call Sequence 6 \_\_\_\_\_  
Call Sequence 7 \_\_\_\_\_

Delivery Routes (6,a)

*Monday:* Delivery Route 1 \_\_\_\_\_  
*Tuesday:* Delivery Route 2 \_\_\_\_\_  
*Wednesday:* Delivery Route 3 \_\_\_\_\_  
*Thursday:* Delivery Route 4 \_\_\_\_\_  
*Friday:* Delivery Route 5 \_\_\_\_\_  
*Saturday:* Delivery Route 6 \_\_\_\_\_  
*Sunday:* Delivery Route 7 \_\_\_\_\_

Delivery Sequences (5,n)

Delivery Sequence 1 \_\_\_\_\_  
Delivery Sequence 2 \_\_\_\_\_  
Delivery Sequence 3 \_\_\_\_\_  
Delivery Sequence 4 \_\_\_\_\_  
Delivery Sequence 5 \_\_\_\_\_  
Delivery Sequence 6 \_\_\_\_\_  
Delivery Sequence 7 \_\_\_\_\_

Primary Delivery Route \_\_\_\_\_

**Edit Order Day/Time screen**

Order Days (Y/N)

*Monday:* Order Day 1 \_\_\_\_\_  
*Tuesday:* Order Day 2 \_\_\_\_\_  
*Wednesday:* Order Day 3 \_\_\_\_\_  
*Thursday:* Order Day 4 \_\_\_\_\_  
*Friday:* Order Day 5 \_\_\_\_\_  
*Saturday:* Order Day 6 \_\_\_\_\_  
*Sunday:* Order Day 7 \_\_\_\_\_

Order Times (6,n)

Order Time 1 \_\_\_\_\_  
Order Time 2 \_\_\_\_\_  
Order Time 3 \_\_\_\_\_  
Order Time 4 \_\_\_\_\_  
Order Time 5 \_\_\_\_\_  
Order Time 6 \_\_\_\_\_  
Order Time 7 \_\_\_\_\_