

# WMS: Did You Know?

## From Professor Merlot



### How to find a Customer's Name, Phone Number, History or Invoice quickly?

In some instances, a customer phones, or walks into your shop and you can only recall his first name, his last name or neither! How do you, professionally speaking, pull this customer's information about his order or past history quickly and in a professional manner?

#### Here's how:

1. You recall his **First Name**. In this example, his first name is Snidely. Press function key, **F8**.

- Fill in the **Display by** radio button to show customers by their **First Name**.
- Start typing, **Snidely** in the **Select the Name...** drop down field.
- As the name is filled automatically, press the **ENTER key**. The customer's information with a **Press to go to...** button next to each Invoice will be displayed. Go to this invoice with this associated button.
- Address, phone number and an email address are displayed. Should there be more than 1 Snidely in WMS, you may have to open the **Select the Name...** drop down button to select the correct entry.

- A simple, "Are you still living at ... or is your phone number still..." question will confirm you have the correct customer.
- The **Funnel/Pencil** button will allow you to jump directly to the Customer Information form to edit this customer's data, should any of it is incomplete.
- To see this customer's Pre-WMS history, press the **Green Book**.
- To view this customer's current history, press the green **Open Book** button.

2. You recall his **Last Name**. In this example, it is **Whiplash**. Press function key, **F8**.

- On this form, fill in the **Display by** radio button to show all of the customers in the WMS by their **Surname**.
- Start typing, **Whiplash** in the **Select the Name...** drop down field.
- As the name is filled automatically, press the **ENTER key** and the customer's information with a **Press to go to...** button next to each Invoice that is on file in WMS will be displayed.



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3. You have no idea about his name, so simply ask for his **Phone Number** and press the function key, **Ctrl-F7, Find by Phone**.

- The first phone number will be shown when opened in the **Select the Number...** drop downfield. It will be displayed in black.
- Note that the **No Area Code** is filled so this is not required to enter. Should he provide a different area code that is current your business, simply fill the **Area Code** radio button field to enter the correct area code.

WMS2000

Find By Phone

Select the Number... 381-8195

Display by:  No Area Code  Area Code

Customer: Leona Aitken

\*\*Address required\*\*, Surrey, BC

Email:

View customer's history prior to WMS orders

Select the phone NUM

• Start typing the phone number of this mysterious customer.

• **NOTE: You must include the DASH between the numbers.**

• As the number is automatically filled, press the **ENTER** key once.

• The result will show all of this customer's info as well as any Invoices he may have in WMS.

WMS2000

Find By Phone

Select the Number... 555-1231

Display by:  No Area Code  Area Code

Customer: Leona Aitken

\*\*Address required\*\*, Surrey, BC

Email:

Select the phone NUM

• Should any of the address or contact information be missing, press the **Funnel/Pencil** button and jump directly to the Customer Information form to edit this customer's data.

• To see this customer's Pre-WMS history, press the **Green Book** button.

• To view this customer's current history, press the green **Open Book** button.

WMS2000

Find By Phone

Select the Number... 555-1231

Display by:  No Area Code  Area Code

Customer: Snidely Whiplash

123 Any Street, Surrey, BC V3R2P2

Email: swhiplast@emai.com

Invoice #	Balance
20	\$97.95

Press to go to...

Select the phone NUM

