efi PrintStream

User Guide

Master File Customer
V21.1.0200

EFI PrintStream | *V21.1.0200 Master File Customer*

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

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Introduction

Overview

The Customer Master File program stores the customer's billing, contact, billing terms and additional information specific to the customer. The customer accounts can be imported into PrintStream or they can be manually entered.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

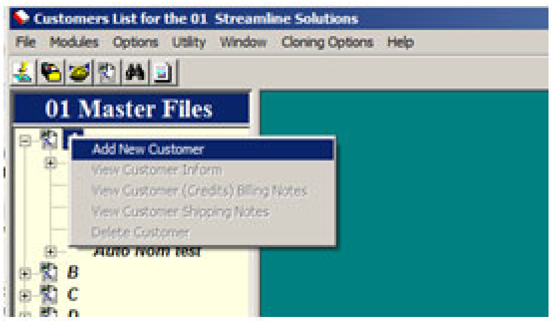
US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Manual Customer Creation

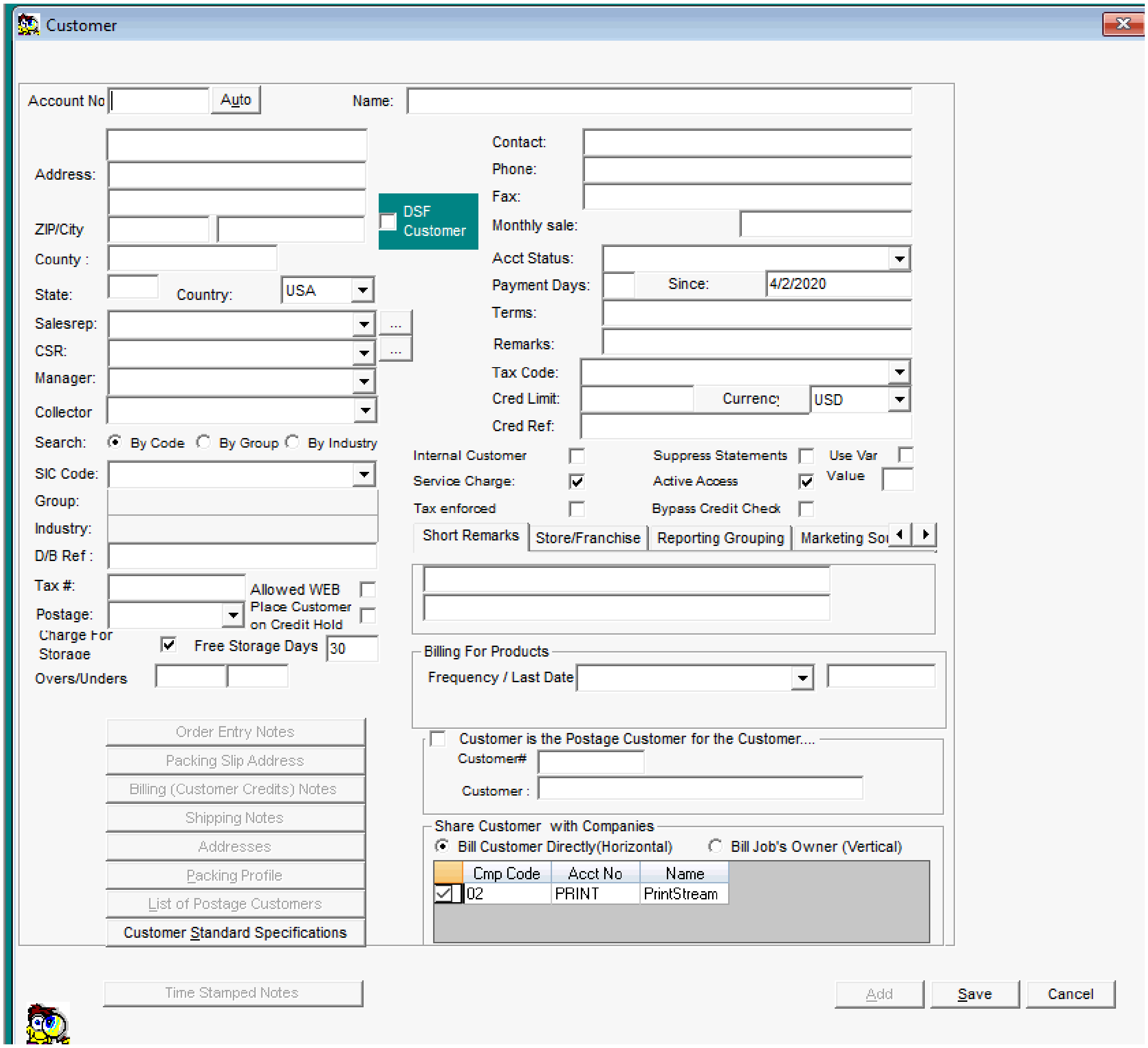
Prior to creating a customer's master file, sales reps, CSR's and tax codes must first be defined. Please refer to the Modules section of this document for more information on these items.

To manually create a customer record, right mouse click in the tree area of the screen, or you can single left click on a letter, and then right click and select Add New Customer.



A blank customer record becomes will display for you to enter your customer's information.

Main Information Screen



Field Information

Account No & Auto - The Account Number can be alpha, alpha numeric or numeric and up to 8 characters in length. It is a required field and must be unique in the system. To select the next customer number available, the Auto button can be used. The number will auto populate incrementally from the highest historical customer number stored in PrintStream. If the numbering schema for Prospects is being used, this number will be the next prospect number available.
Name - The customer name can be up to 40 characters in length and can be alpha numeric. It is required and must be unique to the system.

Address - Address Line #1. This field will hold 30 alpha numeric characters. Address Line #2 can be used for suite numbers, etc. The field will hold 30 alpha numeric characters. This address is the default address for AR Invoices. Optional

Zip - The zip code field will allow 12 alpha numeric characters. Optional

City - A 30 character alpha numeric field. Optional.

County - Used only in the sales tax module and will auto-populate when a zip code is entered.

State - A 2 character, alpha field. Optional.

Country -Select Country from the drop down list. USA will default. This field is for use in the customer address.

Salesrep -Name of the Salesrep assigned to the customer, select from a previously designed drop down list that is created in Customer Master File> Modules>Salesreps, CSR's. The Sales Rep field is 25 characters in length. This field is required. A Salesrep will only appear in the drop down list if it is set to active in the salesreps module.

CSR -Name of the CSR assigned to the customer. A drop down list for CSR selection is created in Customer Master File> Modules>Salesreps, CSR's. An optional selection of 25 alpha characters. A CSR will only appear in the drop down list if it is set to active in the salesreps module.

Manager - Name of the Sales Manager, same as Salesreps and CSR information. The Manager name will only appear in the drop down list if it has been created and is set to active in the salesreps module.

SIC Code for Customer - The combo box can be loaded by Group, by Industry or (the default), by Code. It can also be added directly. The field is optional and holds 4 numeric characters. Please refer to the NAICS/SIC Codes section of this document for information on establishing SIC/NAICS codes in PrintStream.

D/B Ref - For Dun & Bradstreet Info or the entry point code used in Mail.Dat. This field will hold up to 14 alpha-numeric characters.

Tax Number - Federal ID number for non-taxable entities. 15 Characters in length, numeric only. If the customer Tax ID number is in this field, it will print on the invoice in the lower left hand side. Optional Field.

Postage Type - User has the option of selecting Revolving, Permanent or Job Specific. Currently for information purposes only and it does not print on any reports. R = Revolving, P = Permanent, J = Job specific. Field holds one Alpha Character. Optional.

Allowed WEB - For Fulfillment customers. Setting this flag allows the customer to log in via the internet and view various modules specific to their own information, i.e. inventory, invoices. Also works in conjunction with the Customer View program.

Place Customer on Credit Hold - This setting prevents any new jobs being created or estimates being converted to a job for this customer.

Charge For Storage – This setting works with the Inventory Storage Charge feature.

Free Storage Days – This setting works with the Inventory Storage Chare feature to calculate the number of grace days before calculating storage charges.

Overs / Unders – This field will allow the user to define the Overs and Unders for the job that will display on the work ticket.

Contact - Contact name for the customer, 30 characters, alpha numeric field. This is the default contact, typically used as the invoice contact. Other contacts are defined in the addresses section of the Customer screen. Optional.

Phone - Telephone number, 18 characters, numeric field. Optional.

Fax - Field for the Customer Fax number. An 18 character, Numeric field. Optional.

Monthly Sale - This is an amount projected to sell (a goal) to the customer on a monthly basis. This is a 10 character, numeric, optional field. This amount is used in the Sales Support Module, Sales vs. Customer Budget by Salesrep Report.

Account Status - Status A = Payment terms other than 30 days. User defined (Payment days must entered), Status B = 30 day payment terms, Status C = C.O.D., Status D = Refer to Manager, Status N = New Entry, Status P = Prospect, 1 character, Alpha field that is required. See the end of this document for Prospect to Customer conversion procedure. Status D, N and P will prevent any estimate from being converted to a job.

Payment Days - If status = A or B, enter the number of days to pay, 2 character numeric, required if status A or B is selected.

Since - MM/DD/YYYY Date you began work with this customer, 8 characters, numeric. This field is informational only. Currently does not flow to any reports. This is a required field.

Terms - For the terms description, this is a 50 character, alpha field that is optional.

Remarks - A 25 character alpha numeric field, optional, currently informational only.

Tax Code - A 2 digit code, previously defined in the Modules section of Customer Master File. This is a required field. For more on tax codes, see the Modules section of this document.

Credit Limit - Dollar amount of credit limit 15 numeric required for all customer types. If credit limit is zero, estimates cannot be converted to jobs. This is a required field.

Currency- This is a required field that is used as part of currency definition if necessary. Field will auto fill with country from company setup, unless multi-currency (add-on feature) is being used.

Credit Ref - Field for credit reference description. This is a 15 character alpha numeric field which is optional. This information does not flow to reports, and is available from this screen only.

Internal Customer - When selected, this customer's information will be sub-totaled separately on the AR Aging and the Invoices by Date Report.

Service Charge - This box is checked to enable the calculation of service charges on past due balances when using the Accounts Receivable Customer Collection Program.

Tax Enforced - For Canadian customers use, please reference documentation specific to Canadian tax.

Suppress Statements - When this box is selected, a statement will not be printed for this customer from AR Reporter.

Active Access - When this box is checked, the customer has active status. For more details, see the section on Inactive Customers in this document.

Bypass Credit Check - This feature enables an accounting department to place a credit "bypass" flag on a customer. This has the effect of allowing one quote to be turned into a job, bypassing the credit check, and then close the credit check immediately after it to prevent further jobs being entered without credit approval. This feature allows a credit department to maintain a customer on an existing credit limit or credit status, but to allow individual jobs, (based on the bypass credit approval), to be entered without having to artificially change the credit terms. The credit department would approve the override by going into the customer master file and set the account to Bypass Credit Check. As the FIRST job to be created for the customer is entered, the system would allow this first job through the credit check, and then automatically remove the check in the Bypass Credit Check field so any future work would again need to be cleared by the credit department. The differences between this and just allowing the credit department to raise the credit limit is:

1) Credit limit can be maintained at an appropriate permanent level.

2) There is no need to temporarily change the credit status.

3) By setting the flag up ahead of time, the credit department does not have to be available at the time the job is created. This is important when the job needs to be created at a time when the credit department is not available.

Short Remarks/Store Franchise - This information is accessed in this screen or in the SQL search screen. In Mail Estimating, Print Estimating and Print Order Entry, the ability to search by store/franchise has been added to the search/open quote and in the create new header screen.

Reporting Grouping - The following reports in AR Reporter allow reporting by group: Invoices by Date, Invoices by Sales Rep, Customer Sales Volume and the AR Aging report. See Modules section below for creating the Group.

Marketing Source Code - This field is informational only at this time. Marketing codes can be established from the Modules (see further in this document). These marketing codes can then be assigned to customers.

Billing For Products – this setting works with the Product Invoicing feature.

Customer is Postage Customer for the Customer - If this flag is set, this customer can be a sub account for use with the Postage Sub Account feature. The Postage Sub Account (PSA) feature was designed for jobs where the customer referenced on the job is acting as an Agency between the House and the Agency's customer (sub customer), and the sub customer is responsible for the postage portion of the job. The customer acting as the Agency must be defined in Master Files Customer. The sub customer must also be defined in Master Files Customer with the Customer is the Postage Customer for the Customer option checked referencing the Agency in the Customer # and the Customer fields.

For detailed information on how to use this feature, please refer to the Postage module documentation.

Share customer with Companies

Designed for multicompany users to indicate the default invoicing method for the customer as well as the companies allowed access to the customer account.

Horizontal Invoicing - Each company involved on the job will send an invoice to the customer for their respective billing.

Vertical Invoicing - The shared companies on the job will create Inter-company invoices to the company the job was created in, while the company that owns the job will send one invoice to the customer billing services for all companies involved on the job.

Sharing customers allows job sharing between companies and creates flexibility when generating an invoice to a customer for a shared job. Sharing a customer with other companies also allows the shared companies to create jobs to the customer, generate financial and accounting transactions to the customer, etc. For further instruction on how to use this multicompany setting, please refer to the Multicompany document.

Once the customer record is saved, the following Optional fields are activated:

Order Entry Notes - These notes can be viewed when creating jobs for this customer.

Packing Slip Address - This address defaults on packing slips for this customer.

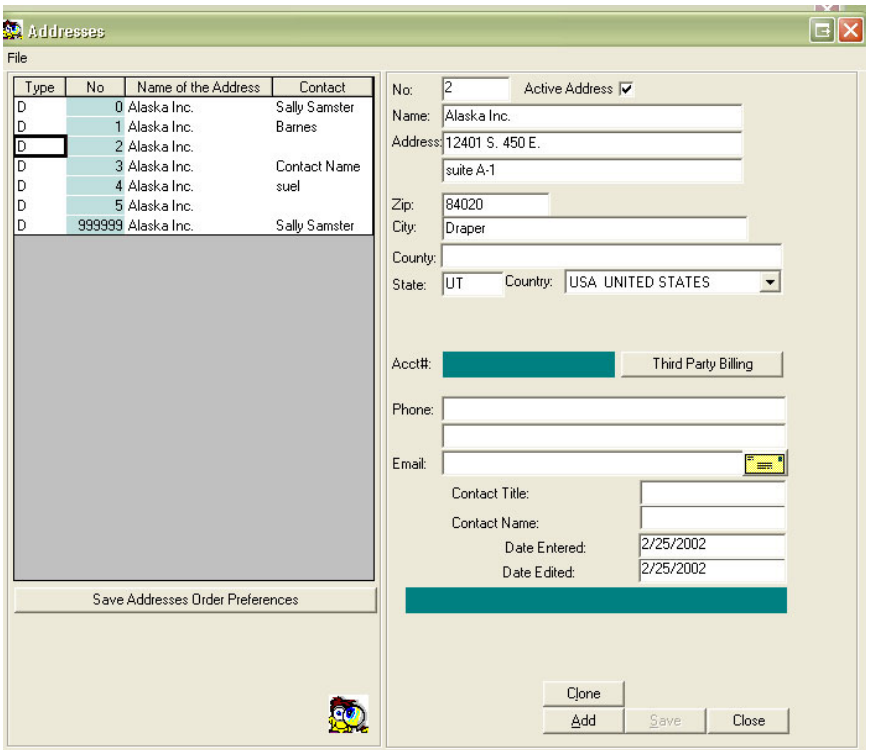
Billing (Customer Credits) Notes - Comments entered here will be able for viewing in the invoicing screen. When billing notes have been entered, a blue check mark will appear on the Notes tab in AR invoicing.

Shipping Notes - These notes are seen when creating shipments to this customer when using the Shipping Module.

Addresses - This is a table that saves more than one address for customer. Additional addresses can be accessed from the Shipping module, the Misc. tab in AR Invoice Entry, Estimating and Order Entry. Alternate

Addresses have 2 fields: first name, last name. Currently, the Title field is not printed on reports, forms, etc. and you should use the Name field for the contact for the address.

The zip code can be verified to indicate whether the county, city, and state match the zip code with the Verify Zip Code button.

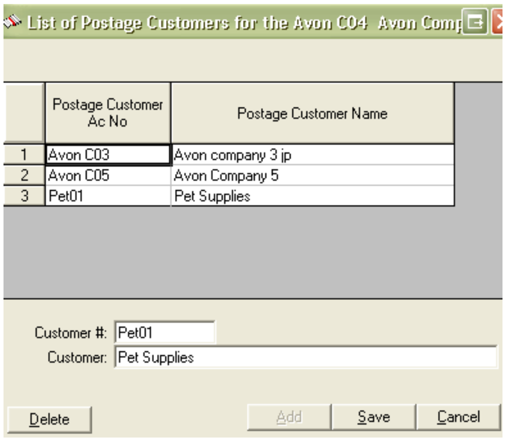


Billing and Shipping Addresses - You cannot use the Billing address in the Shipping address field in PrintStream modules. The Shipping program defaults to the lowest numbered address other than 0 (now it will use 999999 unless other addresses have been added). When defining new customers, saving the record will now automatically create an address 0 and 999999.

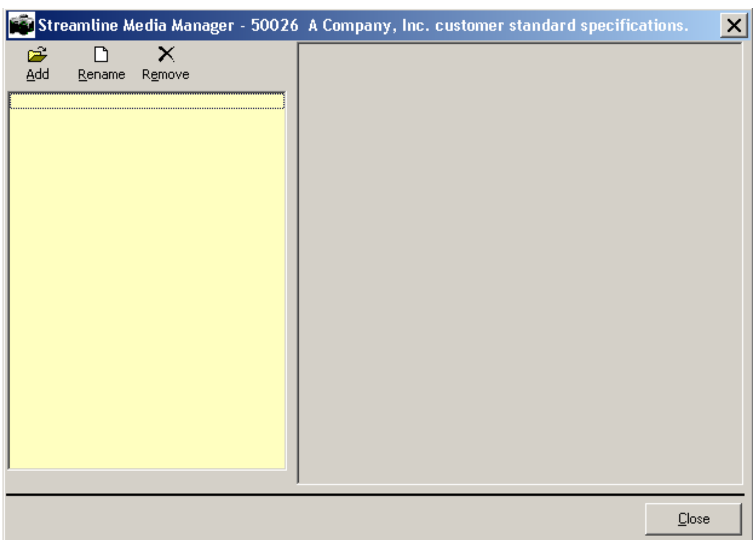
Address cloning when adding additional addresses - You can change the order for addresses (for display in shipping) by changing the address number, using Save Addresses Order Preferences. The address on the main screen, defined as address #0, is the default address used for all items for this customer. Most commonly, this is the contact used when billing the customer. Additional addresses are created in this screen for additional production contacts, “sub” customers i.e. customers of the main customer, additional departments, etc. In PrintStream, whenever a customer’s address can be selected, these additional addresses will be available to choose from. The highest numbered address is the default address for shipments to the customer.

Packing Profile – This button works for the Book Estimating add-on and allows packaging requirements to be defined.

List of Postage Customers - This button only appears when this customer is not a Postage customer for another customer. If this customer has other customers attached as postage customers, then this button takes you to a list of those customers. You may also attach postage customers through this screen.



Customer Standard Specifications - This option allows files to be attached that are specific to the customer.



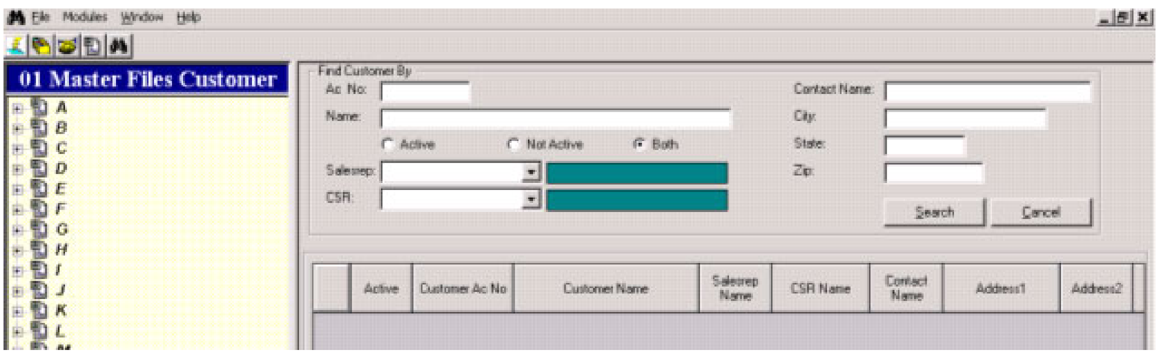
Time Stamped Notes - Customer Time Stamped Notes can be entered at the AR Invoicing level, in the Shipping program and in Sales Prebill. These notes will show behind the Notes tab of AR Invoicing as well as in the Master Files Customer program/Time Stamped Notes button.

Taskbar for Customer Master Files

File Menu

Search By

For SQL databases, this search screen allows filter criteria to be input and searched on in the customer master file. Each criteria field allows a partial string to be searched on. Multiple criteria can also be searched simultaneously. This produces a search results list that meets the filter criteria. A single record can then be chosen from this list to edit in the standard Customer Master File screen. The search criteria filters that are available in this screen are name, active status, salesrep, CSR, contact name, city, state, and zip.



Refresh Tree

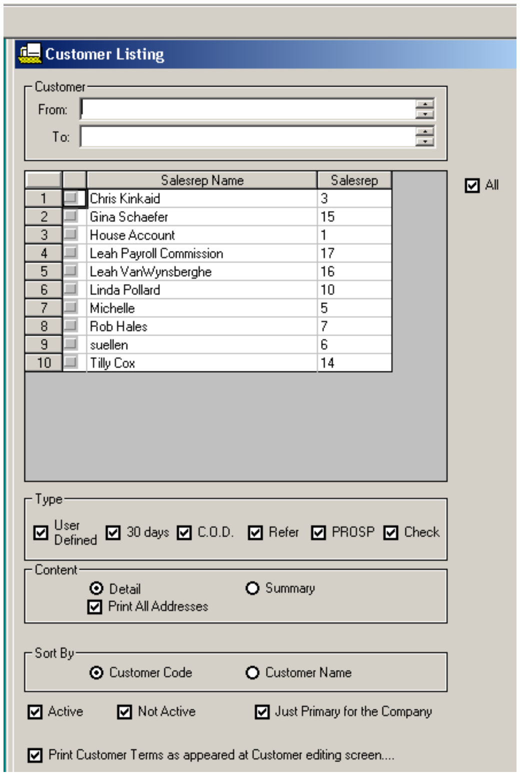
Closes open items in tree.

Setup

Allows user to return the tree to the original format (layout).

Customer List Report

For the Customer List to be previewed/printed.



Default All Existing Customers to Active

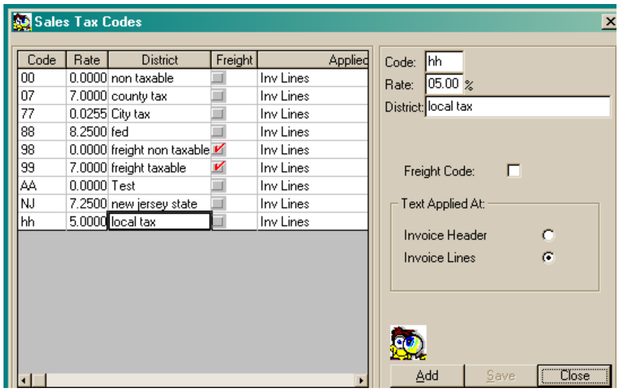
Utility to set all customers to active status.

Modules

Sales Tax Codes (Not used if the tax engine is used)

Setup for Sales Tax amounts to be applied to customer invoices. Each customer must be assigned a default sales tax rate based on this table. These rates are also used in the Accounts Payable module. When setting up the rates, alpha numeric codes can be used. The rate should be defined as 7 for 7% or 5.5 for 5.5%. Two codes should also be entered for freight, one taxable, one non-taxable. The codes established here will help you to determine the amounts due to your taxing entities. The AR Reporter, Month End Sales Tax report segregates amounts by code. Canadian users will require specific setup for GST and PST. Please work with your EFI PrintStream Accounting Support contact

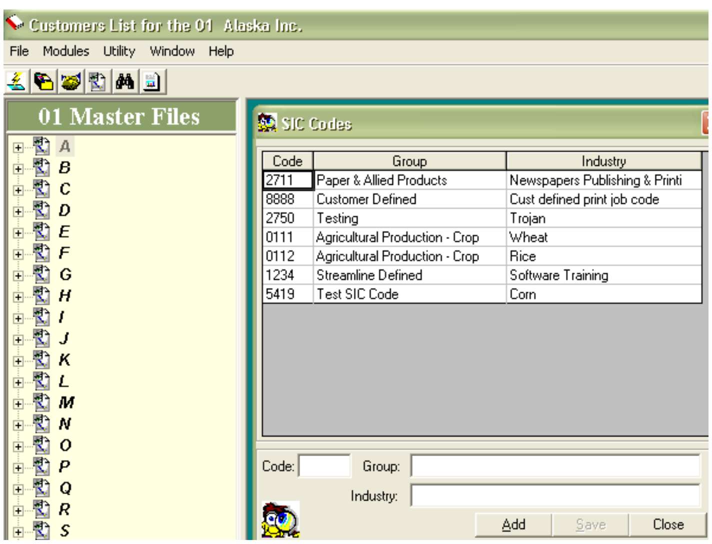
Some states require the use of multiple rates. We suggest using one rate that includes both county and state rates combined. For example, a county rate of 4% and a state rate of 1% would combine to be 5%.



For additional sales tax needs, contact your EFI PrintStream Accounting Support contact to discuss the other options available.

SIC Codes

A spreadsheet containing a sampling of NAICS codes is available. Due to the customer base of our clients and their product mix, we expect you will review and remove detail in certain categories, and add detail in other categories. This would simply be a matter of someone deleting the industry from the standard table and adding it as a new industry in their preferred group. Contact Streamline Accounting support for information on how to use the NAICS import. If you would like to use a custom set of codes, please keep the format setup in the worksheet.

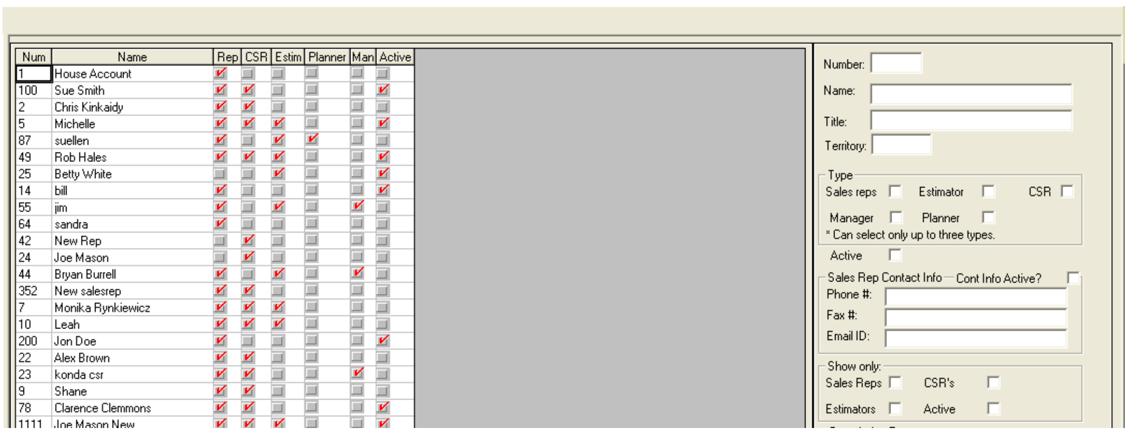


Code 1	Descr1	Descrip2	Code 2	Code 3	Code 4	EOR
1110	Agriculture Fishing & Hunting	Crop Production & Nursery	11	1	0	EOR

1120	Agriculture Fishing & Hunting	Animal Production & Ranching	11	2	0	EOR
1130	Agriculture Fishing & Hunting	Forestry & Logging	11	3	0	EOR
1140	Agriculture Fishing & Hunting	Fishing, Hunting & Trapping	11	4	0	EOR

Sales Reps and CSR's

This section must be completed prior to importing or entering new customers. All customers and all jobs must have a salesrep assigned. The CSR, estimator, planner, and manager are optional. The salesrep number and title are user defined. The **Active** box must be checked in order to see the name on the drop down lists throughout estimating and accounting.

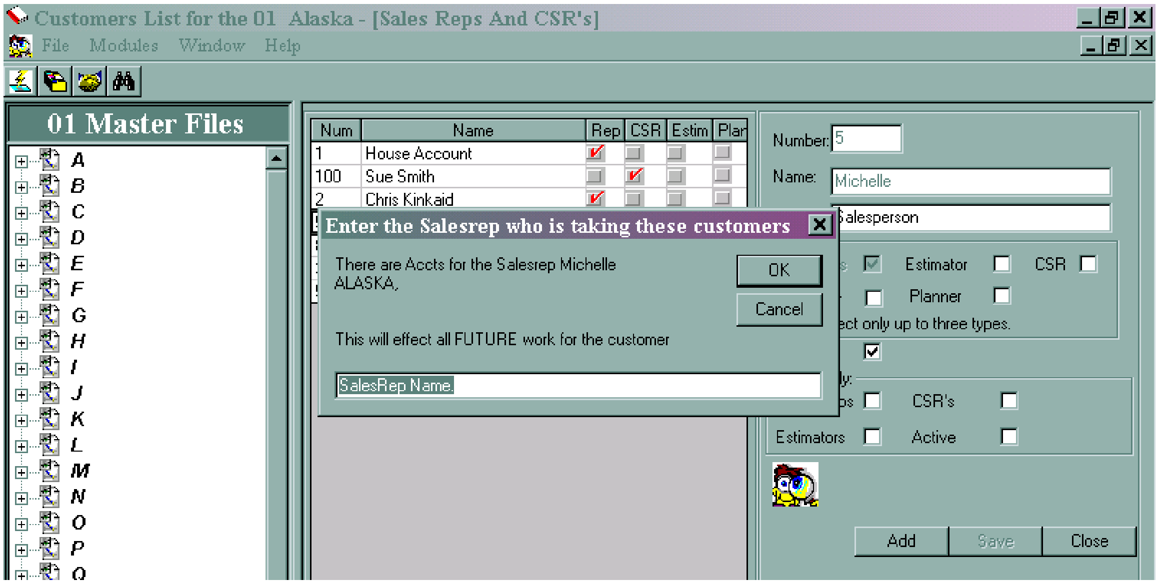


SalesRep changes/deletions

Salesreps, CSRs, Estimators, Planners and Managers can not be deleted after creation. To discontinue use of these type of personnel, please uncheck the Active option.

To discontinue use of any of the above personnel, uncheck the Active check box. To move the customers assigned to that salesrep to a different salesrep, single right click on the "old" salesrep and select Universal Change of Salesrep in Masterfile. PrintStream will search and show you a list of customers assigned to that individual. Enter the name of the new salesrep exactly as it appears in the list and PrintStream will automatically change all of the customers to the new salesrep. (The new salesrep must have been created prior to substitution). Any new quotes/jobs/invoices will have the new salesrep. PrintStream will check if there are old quotes/jobs/invoices with that salesrep. If there are, it will inactivate the salesrep. Active jobs can be manually changed to the new salesrep.

Because CSR's, Estimators, Managers, and Planners are not required for jobs, they can be deleted from PrintStream at will. As with most Masterfile info, we recommend never deleting these entries. It is best to make them inactive.



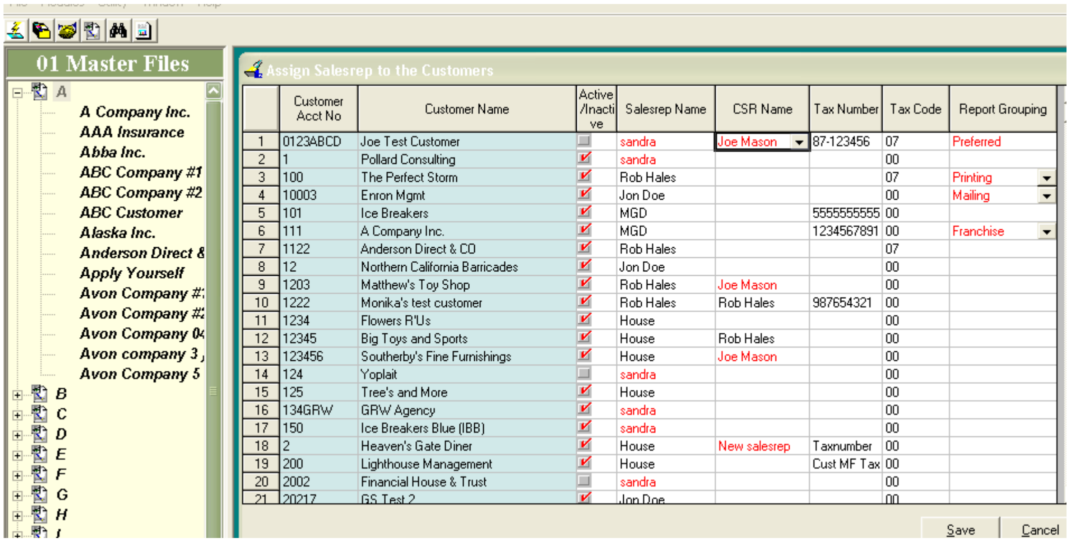
Changing a Salesrep's name is not allowed. Create a new salesrep with the new name and use the auto-change feature outlined above.

Customer: Assign Salesrep, Assign Active Flag

This table lists customer's Active/Inactive status and their assigned salesrep. It also includes the customer tax id number and tax code. Active customers have the red check mark in the Active/Inactive column. To set the customer to inactive, see below. The salesrep name, tax number and tax code can be changed from this table. The table can be sorted by single-clicking on the header of each column. If the salesrep is inactive or Type is not salesrep, the Salesrep column text will be red. When a salesrep cell is selected, a combo box loads with active salesrep names. If Save is selected without doing any changes for an invalid row, bad data will clear. Next time the column is sorted the empty cells will group together for ease in entering information.

Inactive Customer Feature

A customer cannot be marked as inactive if there are any jobs which have not been final invoiced, if the customer has a postage balance or an unapplied AR balance or if there are any invoices which are not paid in full. Inactive customers will still appear on reports. Marking a customer as inactive will change their credit limit to zero. Quote/job (in MailEstPam, Print Estimating nor Quick Job Entry) for any customer which is marked "Inactive" in the Masterfile Customer program cannot be created. If a quote already exists for the customer and then you make the customer inactive, their credit limit becomes zero. If necessary the quote can be created to a job by overriding the credit limit.

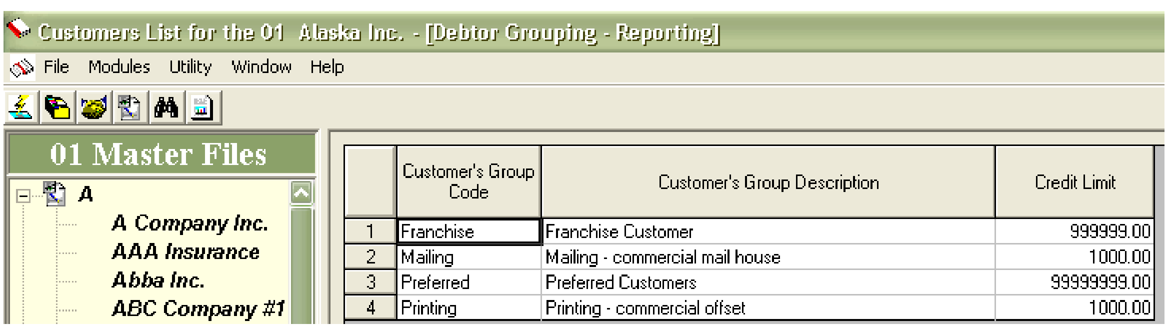


Customer: DSF Flag Editing

This setting is specific to customers integrated with DSF. Please consult with your EFI PrintStream representative for further instruction.

Define Customer's Grouping for Reporting

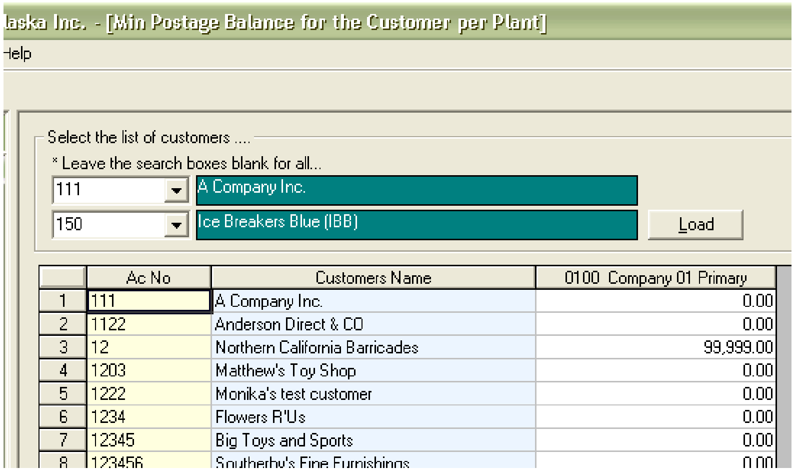
To create and assign a grouping for individual customers, from Modules, select the option to Define Customers Grouping for Reporting. Select Add. Create a Group Code and a Group description, then Save. The Credit Limit cell is for information purpose only. The information is stored in a database and can be accessed for customer created reports

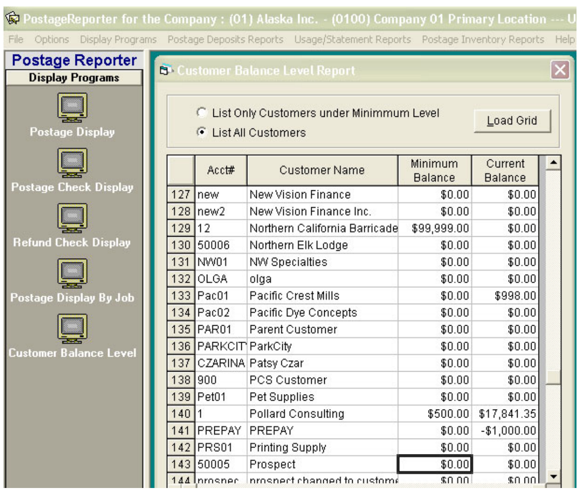


Once the groups have been established, customers can be assigned to the groups in two different ways. The grouping can be set when the individual customer screen is open, or using the option to assign a salesrep, select the grouping from the drop down list and save. See grid on previous page to Inactivate or assign salesrep.

Assign the Min Postage Balance for customer

This option allows a specific dollar amount to be entered for the minimum amount of postage suspense to be on hand for a particular customer. This information feeds the Customer Balance Level report in the Postage Reporter.

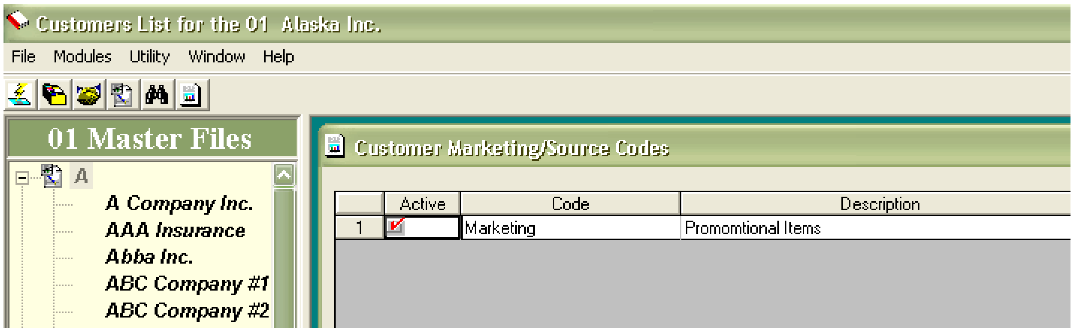


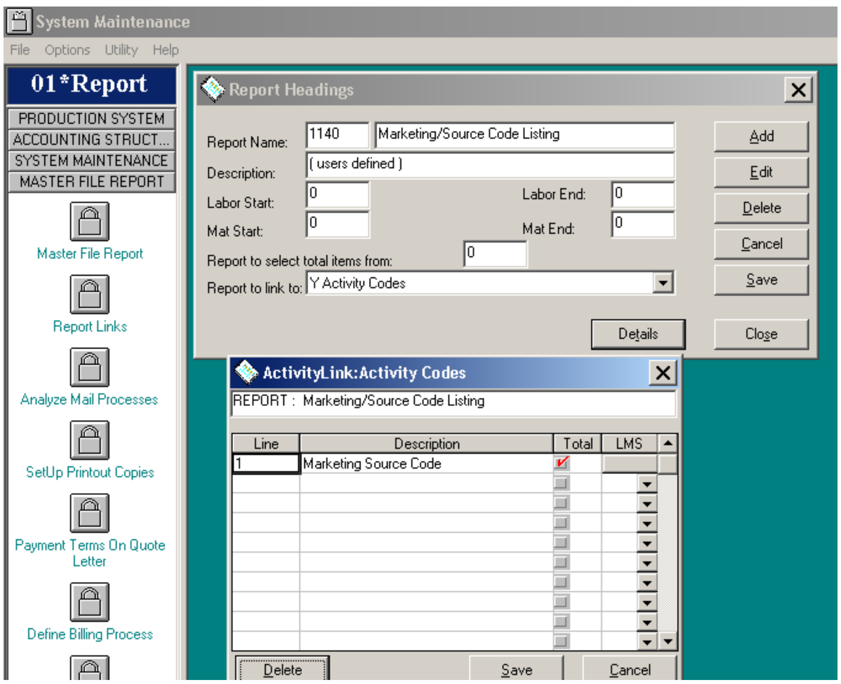


Customer Marketing and Source Codes

Currently, these are informational fields that can be created and assigned to customers as desired. Information is stored in a database and can be accessed for customer created reports.

Report 1140 must be defined Masterfile Reports>Masterfile Reports>Masterfile Reports.



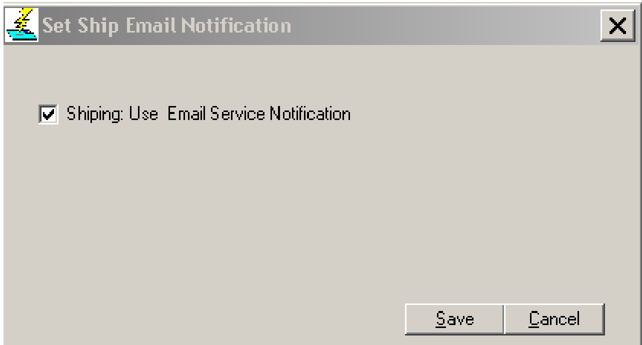


Set Email Notification from Shipping Module

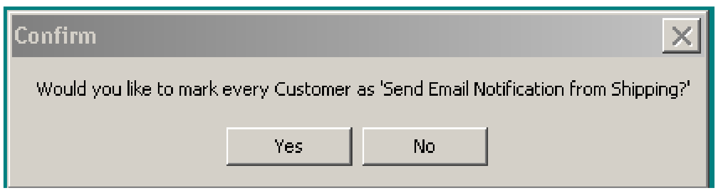
This feature will send email notification to the email address referenced in the customer's masterfile defined at the address the shipment was sent to as well as to the salesrep and CSR defined for the customer.

Setup is required to use this feature.

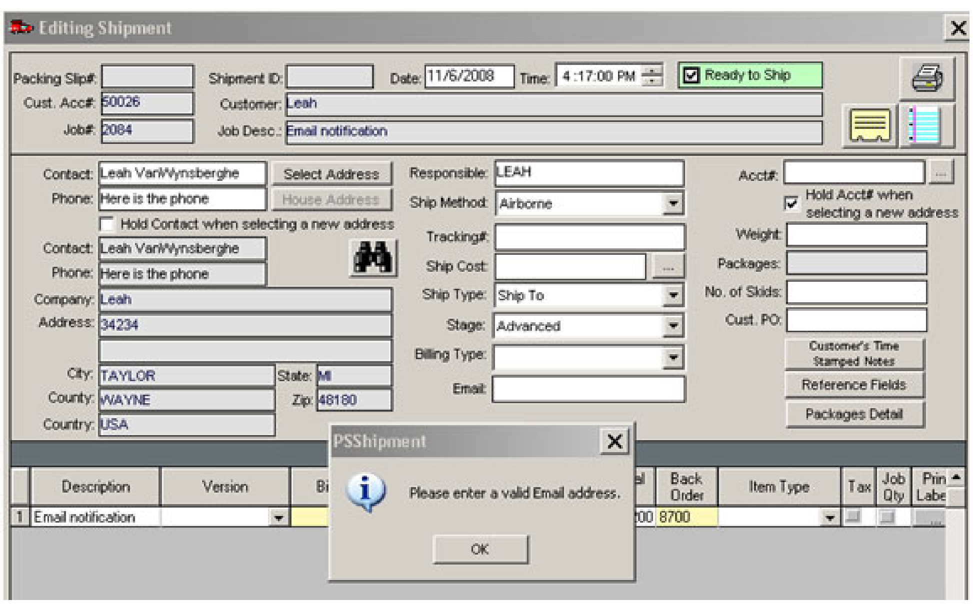
1) Activate this feature in Masterfile Customer>Modules>Set Email Notification from Shipping Option. Check the Shipping box option, select Save.



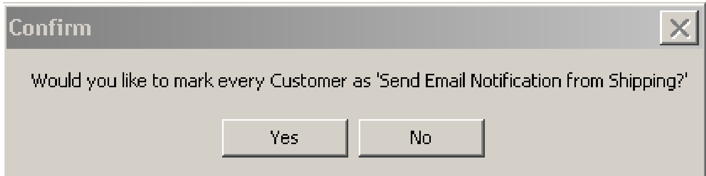
You will receive a confirmation. If you click on YES, every customer in your database will be marked to receive an email. **Before selecting Yes, please consider the ramifications below.**



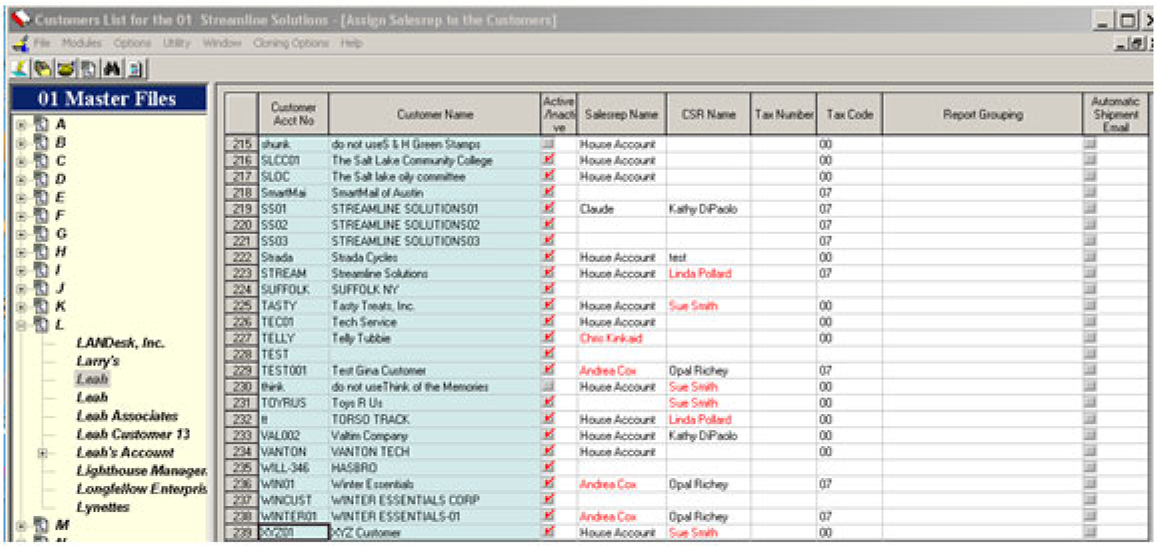
If your customer does not have an email address defined and you attempt to create a shipment, you will be prevented from saving that shipment until you enter an email address.



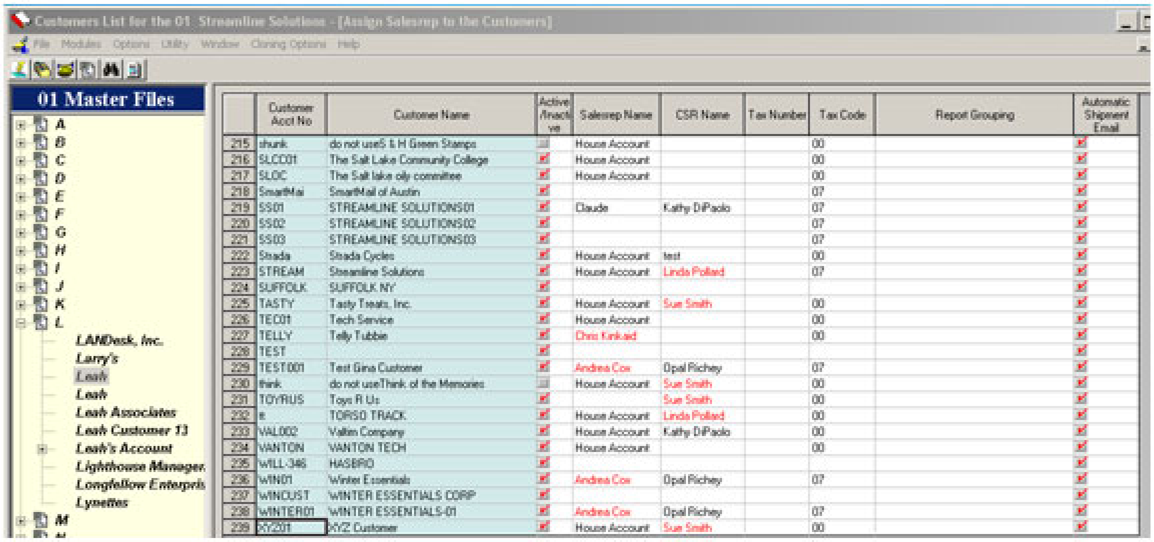
If you click on No, you will need to manually select which customers you wish to work with the Automatic Shipment Email notification.



If you selected No, you can manually select the customers you would like to enable this feature for. Select the Customer Assign Salesrep to the Customer under Modules in Masterfile Customer Place a check mark in the column titled Automatic Shipment Email for the customers you want to use this feature for.



If you selected Yes, all the customers will automatically be checked. You can uncheck the ones you wish to not receive the email notification.



2) The email template must be defined in Masterfile Reports>System Maintenance>Shipping Email Template.
3) Email addresses must be defined for the customer located in the Addresses button.
4) Email address must be defined for the salesrep and CSR
5) The Set Up Shipping Files utility must be generated in the Job Cost entry program.

AR Contingency Setup

This is customer specific programming.

Options

Switch the company

This option allows multicompany users to switch to other companies defined in the PrintStream database. Switching companies from within a program only changes the company for the program only. The users security setup will dictate the companies the user can switch to.

Utility

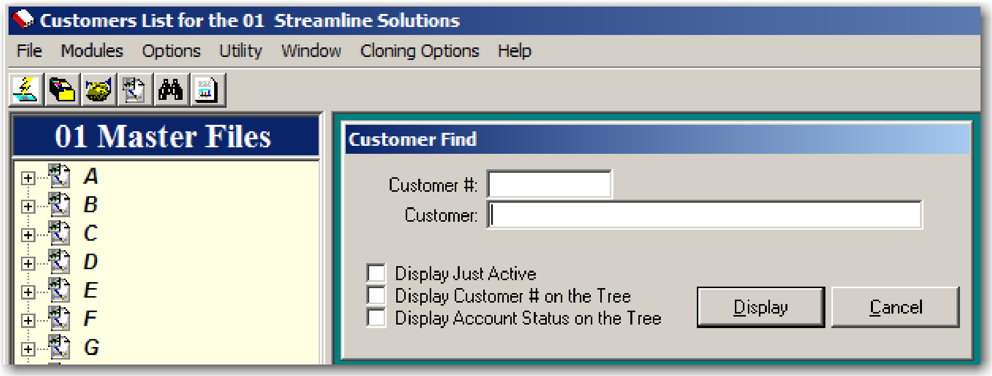
Items in this area are password protected and are primarily used by EFI PrintStream. Please consult with an EFI PrintStream representative for assistance.

Cloning Option

This option is for use by EFI PrintStream Support only.

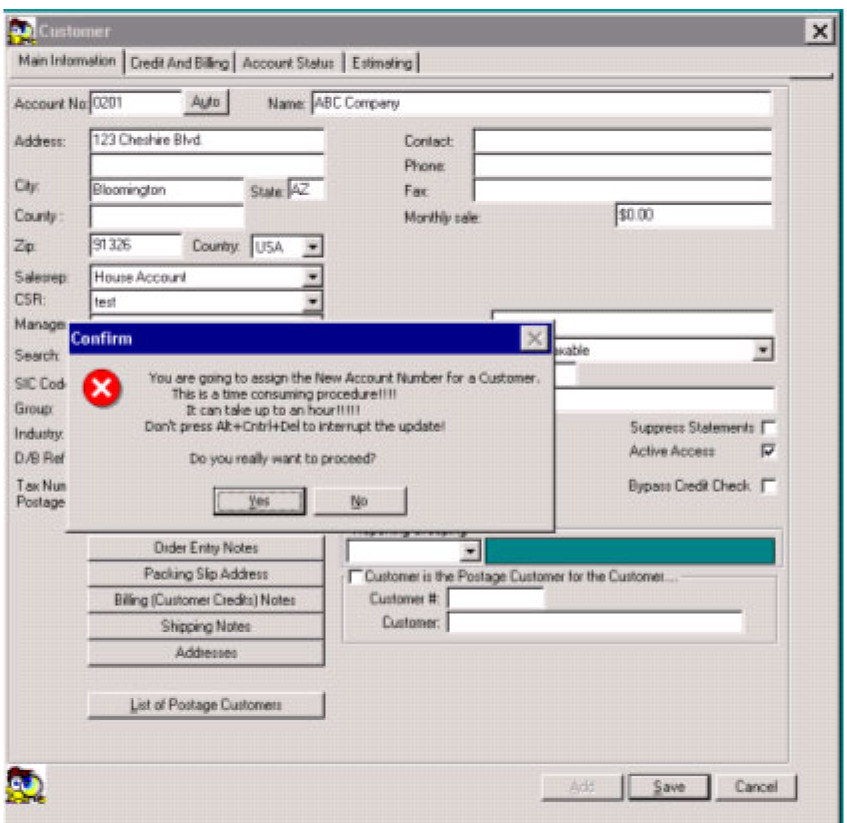
Find Customer Name

The binocular icon will allow you to search for a customer by number or by name. You can also change the appearance of customers in the tree by selecting Display Just Active or Display Customer # on the Tree in addition to the customer name. This setting is workstation specific. The arrow keys on the keyboard can be used to scroll through the list.



Change Customer Number

The MasterFiles Customer allows a change of customer account number. To change an account number, open the customer's account, change the account number and click on save. You will then be prompted to confirm the change.



Prospect to Customer conversion procedure

Prospective customers must be converted to “Live” customers prior to an estimate being converted to a job. A prospect should also be converted prior to any cash receipts or invoicing. To convert the prospect, select the prospect from the tree and select view customer information. Change the prospect account number to an account number consistent with your live customer scheme and also provide the appropriate terms. Additionally, all required fields such as credit limit and tax code will need to be established.