TOSCOGA Software

How do I…

Enter Contact Information (Guests, Dealers, Consignees, Vendors, Employees)

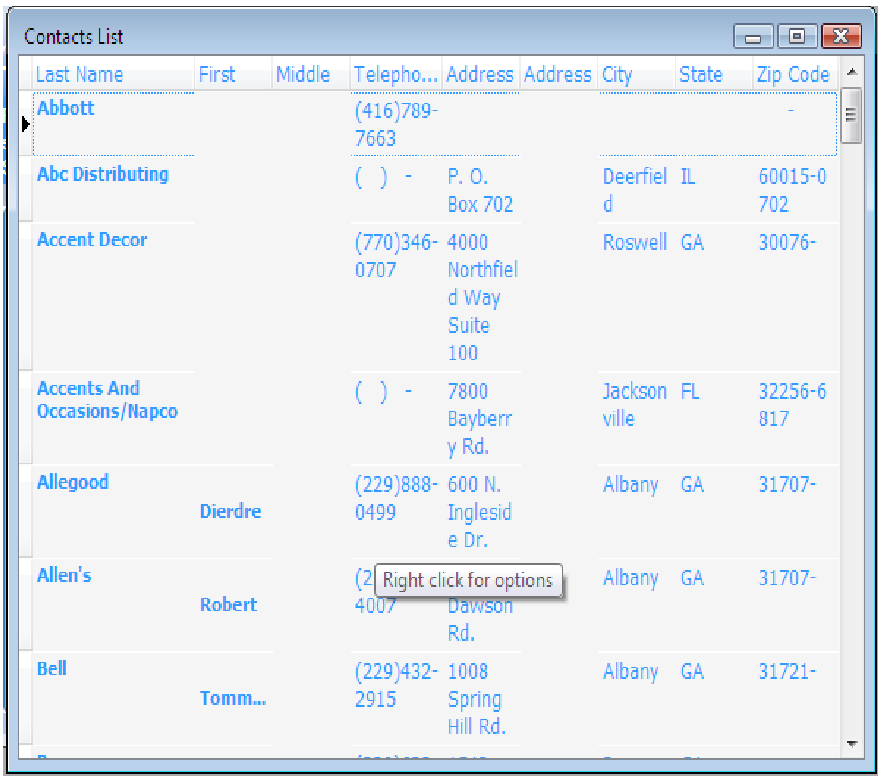
TOSCOGA Software
10/24/2009

How do I…

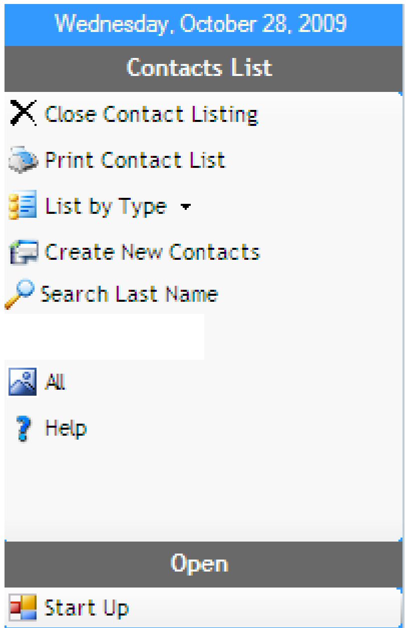
Enter Customer Information

From the Main Menu Press Contacts > Contacts List

You will see a screen that lists all of your current contacts.

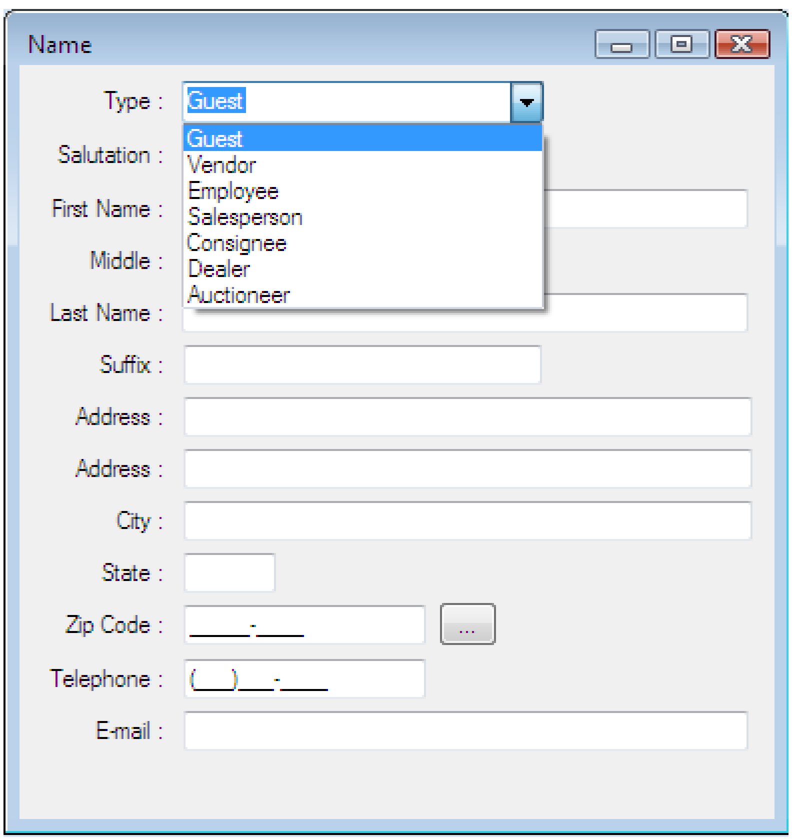


On the left panel your options are presented.



These options allow you to search your contact list by type and by the text you enter.

Press ‘Create New Contacts’ to begin adding a new guest, dealer, or employee, etc.



Select the type of contact you are entering.

Guests

This category is for your customers. This allows no access to any restricted areas of the internet site.

Dealers

This category is for your dealers with rented space(s). It allows users to view their sales online, set up an online shop and manage their inventories on the web site.

Consignees

This category is for your consignees and it allows them to view their sales online.

Vendors

This category is for your vendors to whom you regularly issue checks. It allows them to view some accounting information online.

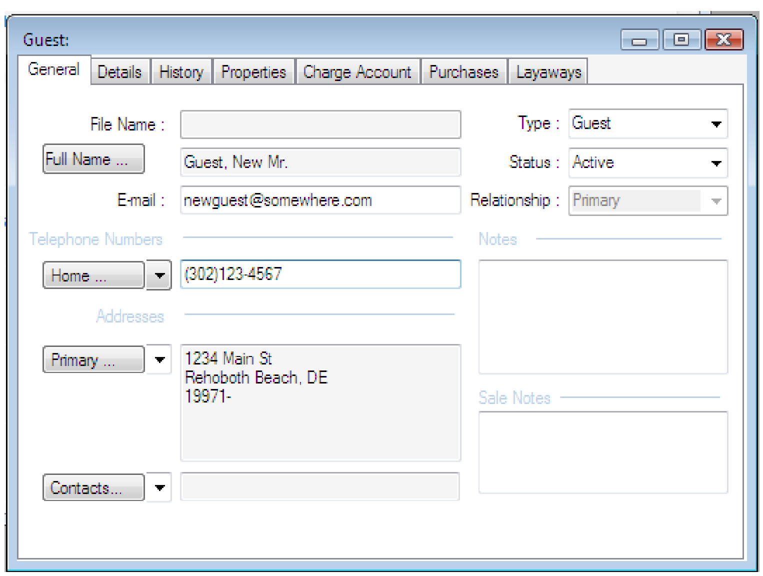
Employees

This category is for all employees. It allows them to use the Point of Sale system according to the User Role Access Rights granted.

Auctioneers

This category is for all auctioneers.

Complete the entries as completely as possible. Press Save to save this contact and continue. The system will offer different options on the next screen depending on the type of contact.



Press the ‘Full Name’ button to edit the contact name.

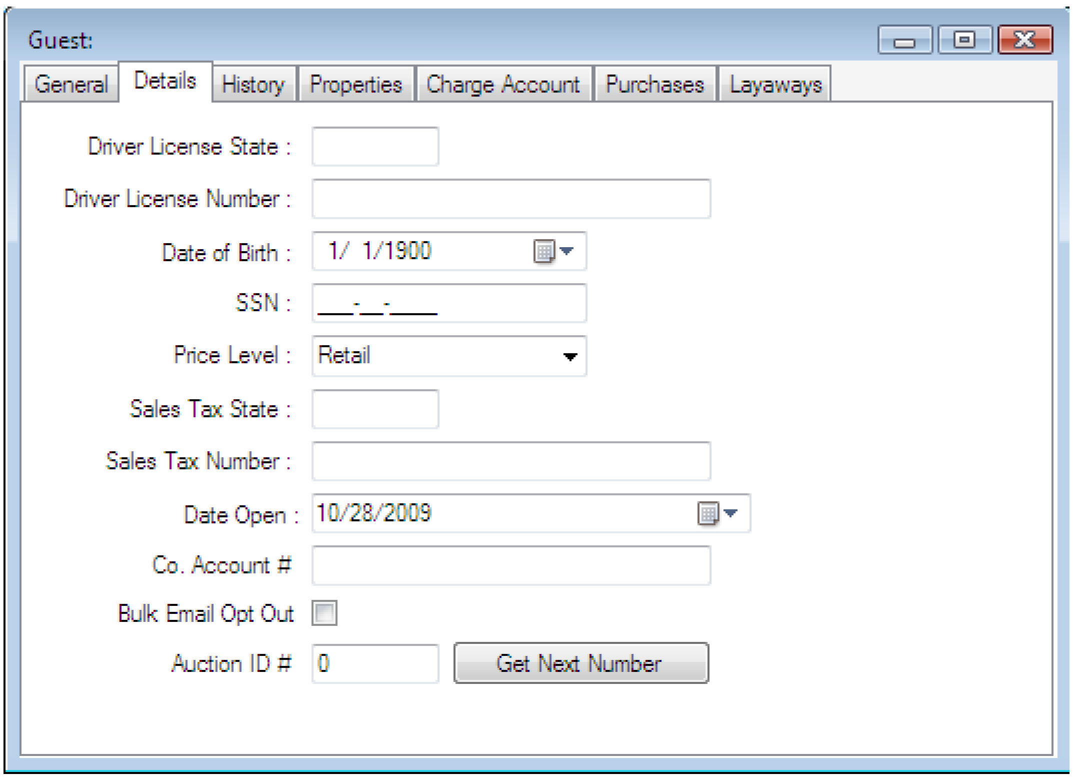
To edit or add phone numbers press the drop down button to reveal the types of telephone number choices. You can save 1 phone number for each different type of telephone contact number, home, cell, work, etc.

To edit an address drop down the list of different addresses. You can save 1 address for each of the choices, primary, home, work, etc.

Under the ‘Contacts’ button you can link this contact to any number of other contacts in your database.

For example, if multiple dealers are renting a booth you can enter a main contact with the name of their business. Then you can enter each dealer’s name and link them to the main account. By doing so, you also link each dealer to each other.

Under the ‘Details Tab’ you may enter more personal information about the contact.



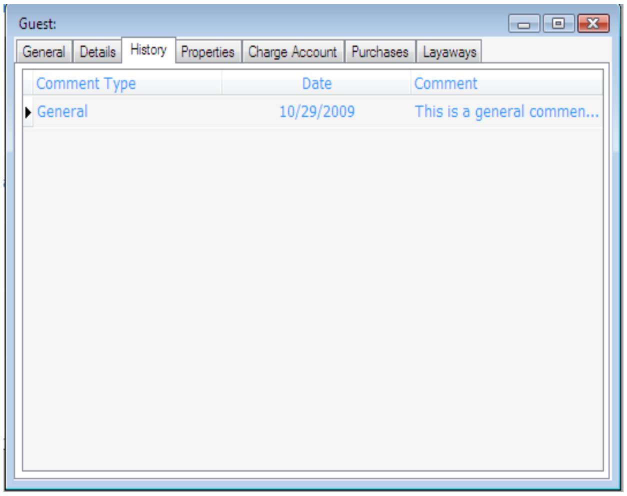
Most of the information is self explanatory except for the ‘Price Level’ field and the Bulk Email Opt Out.

When entering inventory information you may set up to 4 prices, Retail, Preferred, Dealer Cost or Interior Designers. You can select the price level for any contact so when you sell an item the system will automatically charge the appropriate price.

When a contact is entered into your system you may send bulk emails to notify your contacts of specials sales, etc. If the Opt Out field is checked then those folks will not be included in the mailing.

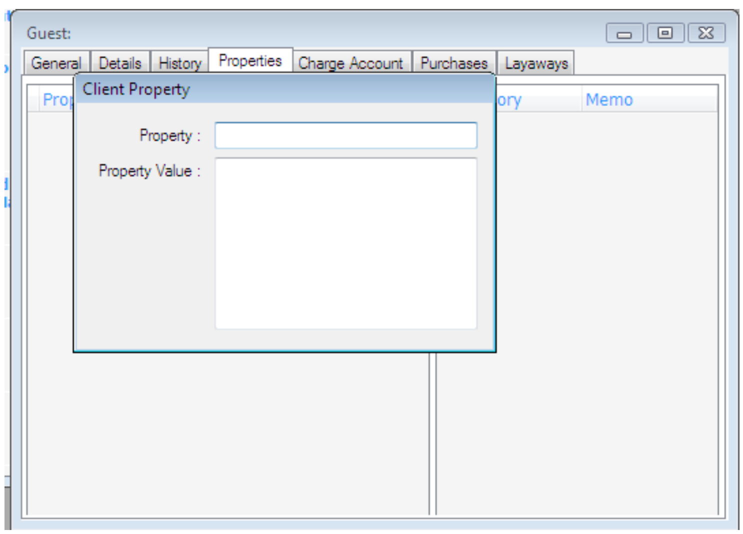
The Auction ID # is obsolete.

Under the ‘History Tab’ you may enter comments about this contact.

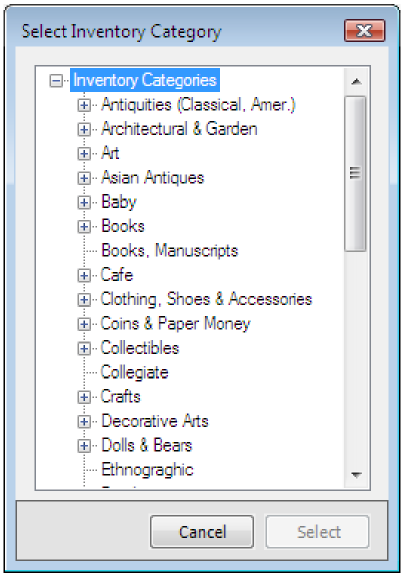


Right click the mouse to create, edit or remove a comment. These comments are for internal use only.

The 'Properties Tab' contains 2 separate functions. Properties allows you to enter even further information about your contacts. It is free form in that you enter a Property Name and then associate a value with that name. A simple example would be: Property: Hair Color – Value-Brown. You may include any number of properties with each contact.

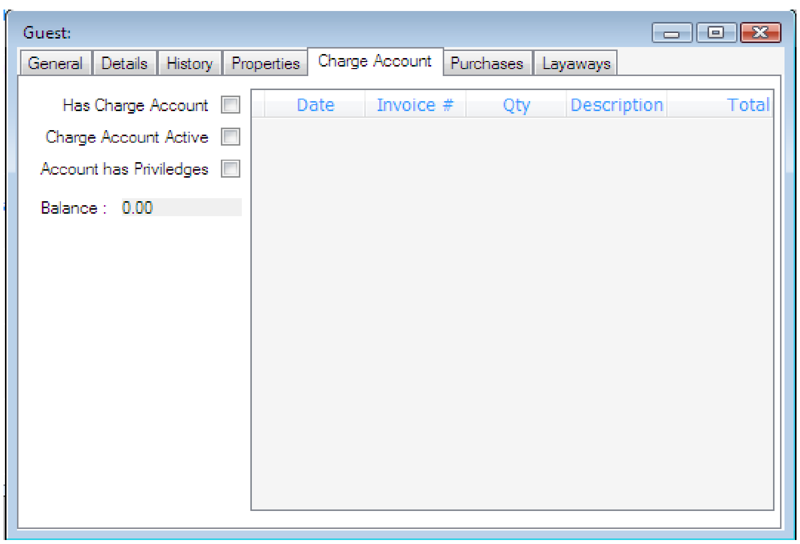


The 'Categories Tab' allows you to associate a guest with a merchandise category.



Select a merchandise category then enter any further details you wish to save with this association. This may be useful in future marketing of merchandise.

On the 'Charge Account Tab' you can set the system to allow this contact to open a charge account and charge their purchases. All dealers and consignors will have a charge account.



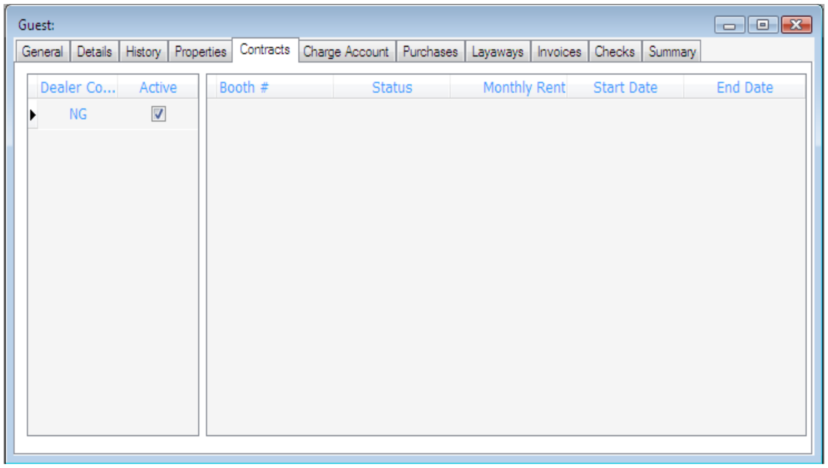
Check the 'Has Charge Account' to open a charge account. Check the 'Charge Account Active' to activate the account. Converesly, you can temporarily suspend the account by un-checking it. Check the 'Account has Priviledges' to allow those contacts with whom you have associated with this account to charge purchases.

The 'Purchases Tab' lists all previous purchases this contact has made.

The 'Layaways Tab' lists all the layaway purchases for this contact.

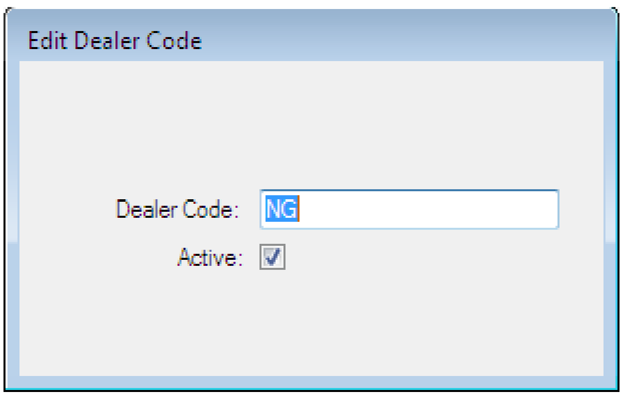
Dealers

Dealer accounts will contain several additional tabs.



The ‘Contacts Tab’ will list all previous and current rental contracts for this contact.

It also lists all the dealer codes on file for this dealer. Right click the mouse on the Dealer Codes list to create a new code, edit a current code or remove a code.



Dealer codes may be de-activated at any time by un-checking the Active box.

Dealers may have any number of dealer codes. Further, you may associate codes with your rental contracts. Each code may be on multiple contracts and different codes may be associated with different contracts. Therefore, you can have the flexibility of charging a different commission rate for each code.

The ‘Invoices Tab’ displays a list of all rental charges for this contact.

The ‘Checks Tab’ displays a list of all checks that have been issued to the dealer. This is only checks printed using the system to print your checks.

The ‘Summary Tab’ summarizes the dealer activity by month.