

Customer Database	Date	Completed	Date
	Expected	(Initial)	Completed
1. Send customer database information to O/PUS to be converted. Or you can manually load all customers into the database.			
2. Add, change, and delete customer records. Inquire on customer database by name and account number.			
3. Add, change, delete and view multiple shipping addresses.			
4. Assign customers to the appropriate taxing districts. Add, change, delete and view tax districts. Do test orders on various customers to check tax districts.			
5. Set pricing options for all customers and assign order entry status codes. Test discounts, cost type, and contract pricing in order entry with customers who have various pricing structures.			
6. Set up customer credit limits. Test some large orders to become familiar with the prompts that appear when a customer goes over the credit limit.			
7. Be familiar with the customer reports available through the standard customer reports menu. (The best way to learn about reports is to print them. Note the reports that you print frequently.)			

Customer Database (continued)	Date Expected	Completed (Initial)	Date Completed
8. Review customer history. Do some test orders to see how the boxes are updated.			
9. Add a departmentalized customer.			
10. Add specialty customers such as Cash, National Drop Ship, and so on.			

Completed

Authorized signature: _____ Date: _____