


About Customer Evaluation

The Customer Evaluation dialog box allows you to view the customer's complete buying history quickly and easily. Viewing this screen allows you to evaluate your customer in every aspect of their buying history from sales to delivery. You can view pie charts and graphs by customer sales, categories, service, or credit.

You can access the Customer Evaluation dialog box from the Customer database or Order Entry.

- From the Customer database menu, click . You can also click View then select Evaluation or type **Ctrl + F11**.
- In Order Entry, click Order Entry from the menu then select Customer Evaluation. You can also type **Ctrl + F11**.

In the Customer Evaluation dialog box, simply click the drop down arrow under each section and select the information that you want to view. You can also click the buttons at the bottom of the box to select Sales, Categories, Service, or Credit. See Figure 1.

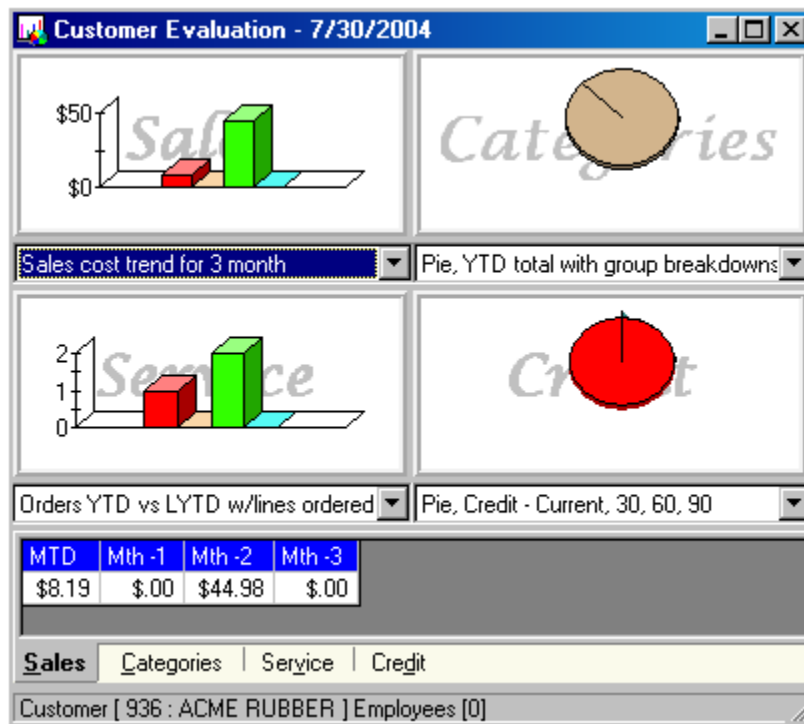




Figure 1: The Customer Evaluation Dialog Box

Using Customer Evaluation


- 1 Double-click  .
- 2 In the Customer database, select the customer for which you want to view pie charts and graphs.
- 3 Once you've selected the customer, click  .
- 4 In the Customer Evaluation dialog box, simply click the drop down arrow under each section and select the information that you want to view. You can also click the buttons at the bottom of the box to select Sales, Categories, Service, or Credit.

When you click the down arrow on each section, the graph changes accordingly. For example, the first box displays sales information. Click the down arrow to select to view Sales vs Budget 12 months. The graph changes and the dollar figures for the graph are shown at the bottom of the dialog box.

You can also view information by clicking on the tabs at the bottom of the dialog box. Click Credit, for example, to view Current, 30, 60, and 90 day figures. This information is for display only.

- 5 When you finish viewing information, close this dialog box. The system returns to the Customer database.

Viewing Customer Evaluation in Order Entry

- 1 From the Order Entry window, click the Global tab.
- 2 Select the customer for which you want to view customer evaluation.
- 3 Click  . The Customer Evaluation dialog box opens.
- 4 To view different information, click the down arrow in the Sales, Category, Service, or Credit section and click the information you want to view. This information is for display only.
- 5 When you finish viewing information, close the Customer Evaluation dialog box. The cursor returns to the Order Entry Global tab.