

Dole & Bailey • ProVisions

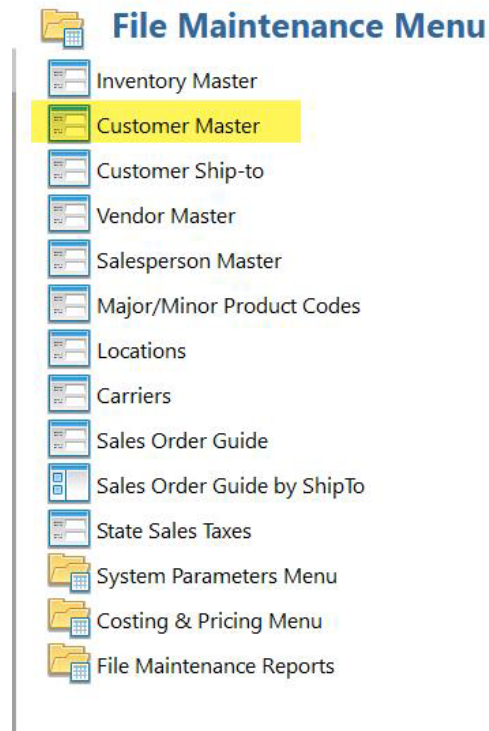
# Accounts Receivable Contact Updates

Dole & Bailey, Inc.

Implementation Date: 06/21/24

PURPOSE: To show and explain how to update and/or add contacts to the Accounts Receivable section of a customer's account in Customer Master in ProVisions.

Access **Customer Master File** in ProVisions.



Input the account name or account number as you would in any other search field in ProVisions, using the F2 function to search if needed.

File Maintenance for Customer Master File

Default Additional

Exit Clear Write Delete Prospects DataView

Customer Code: 53352 Last Maintained: 06/05/24

Name: TUCKAWAY TAVERN

Check Name:

1 General Information 2 A/R Sales Information 3 Credit Information 4 Parameters 5 Custom Data

Address 1: 58 ROUTE 27

Address 2:

City: RAYMOND State: NH

International

Address 3:

Address 4:

Zip Code: 03077 Country Code: USA

Telephone: (603) 244-2431 Fax Number: (603) 244-2481

1st Contact: PAUL SIMBLIARIS

Password: Remote User Override:

Acronym: TUCKAWAY - NH

Cross Ref ID:

Ship Location:

Bill to Customer:

E-Mail Address:

Text

Comment:

Special Instructions 1:

Special Instructions 2:

Special Instructions 3:

Special Instructions 4:

Vendor Code:

Our Vendor Code:

Remit to Address:

Duns ID:

Vat Number:

Automatic Credit Card ID:

In the upper left-hand corner click the “Additional” menu

File Maintenance for Customer Master File

Default Additional

Exit Clear Write Delete

Customer Code: 53352

Name: TUCKAWAY TAVERN

1 General Information 2 A/R Sales Information

Address 1: 58 ROUTE 27

Address 2:

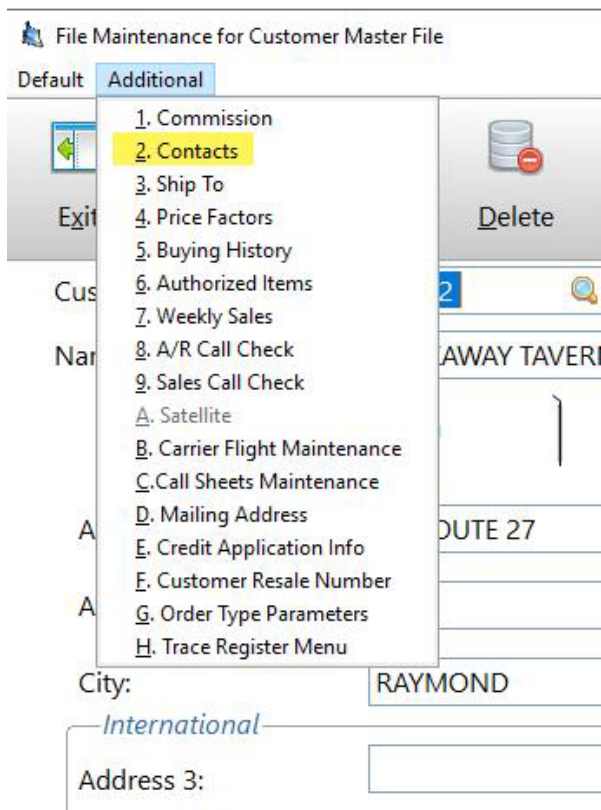
City: RAYMOND State:

International

Address 3:

Address 4:

Within the “Additional” menu, select “2. Contacts”



File Maintenance for Customer Master File

Default Additional

1. Commission  
2. Contacts  
3. Ship To  
4. Price Factors  
5. Buying History  
6. Authorized Items  
7. Weekly Sales  
8. A/R Call Check  
9. Sales Call Check  
A. Satellite  
B. Carrier Flight Maintenance  
C. Call Sheets Maintenance  
D. Mailing Address  
E. Credit Application Info  
F. Customer Resale Number  
G. Order Type Parameters  
H. Trace Register Menu

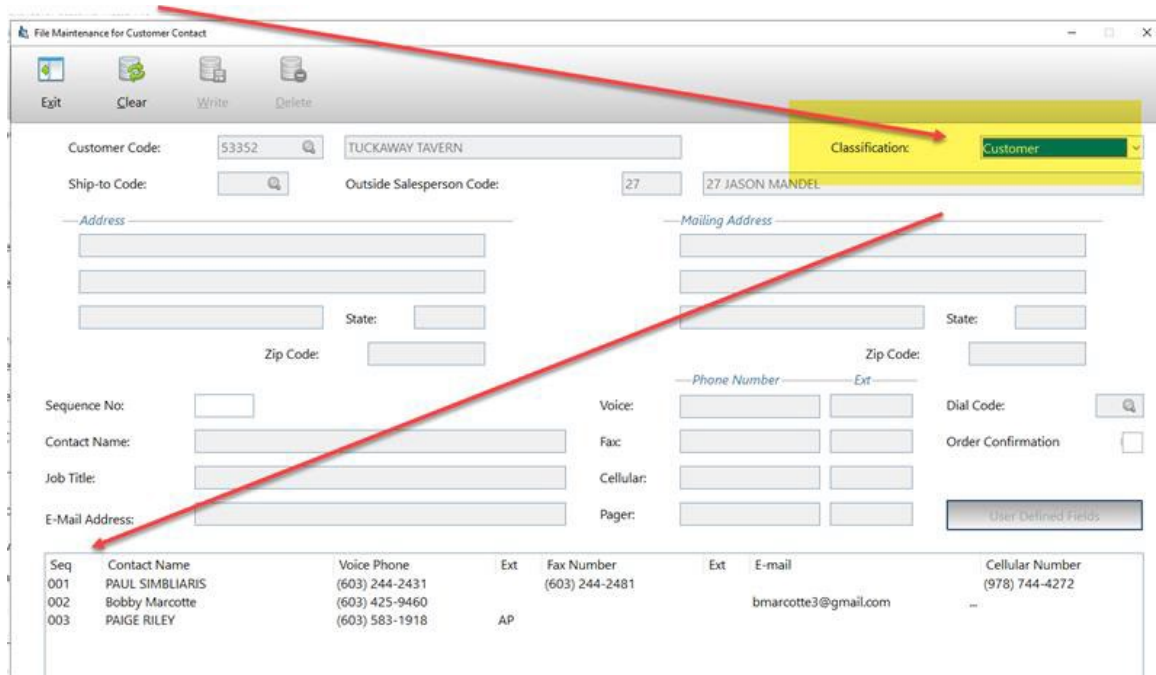
Customer Code: 53352 TUCKAWAY TAVERN

Ship-to Code: Outside Salesperson Code: 27 27 JASON MANDEL

City: RAYMOND

Address 3:

Clicking “2. Contacts” will default to the **CUSTOMER** tab in the top right, which is your **SALES** contact information. Contacts are controlled by the **SEQUENCE** number seen in the far left column which is set by you when updating/adding contacts.



File Maintenance for Customer Contact

Exit Clear Write Delete

Customer Code: 53352 TUCKAWAY TAVERN

Ship-to Code: Outside Salesperson Code: 27 27 JASON MANDEL

Classification: Customer

Address

Mailing Address

Sequence No:

Contact Name:

Job Title:

E-Mail Address:

Voice: Voice Phone: (603) 244-2431 Ext: Fax Number: (603) 244-2481 Ext: E-mail: bmarcotte3@gmail.com

Fax: (603) 425-9460 Cellular: (603) 583-1918 AP

Dial Code: Order Confirmation

User Defined Fields

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	PAUL SIMBLIARIS	(603) 244-2431		(603) 244-2481			(978) 744-4272
002	Bobby Marcotte	(603) 425-9460				bmarcotte3@gmail.com	
003	PAIGE RILEY	(603) 583-1918	AP				

Click on the drop down and select **“Accounts Receivable”** to go to the Accounts Receivable contact library.

File Maintenance for Customer Contact

Exit Clear Write Delete

Customer Code: 53352 TUCKAWAY TAVERN Classification: ShipTo

Ship-to Code: Outside Salesperson Code: 27 27 JASON MANDEL

Address Mailing Address

Sequence No: Voice: Dial Code: Order Confirmation

Contact Name: Fax: Cellular: Pager: User Defined Fields

Job Title: E-Mail Address:

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	PAUL SIMBLIARIS	(603) 244-2431		(603) 244-2481		bmarcotte3@gmail.com	(978) 744-4272
002	Bobby Marcotte	(603) 425-9460					...
003	PAIGE RILEY	(603) 583-1918	AP				

Customer Code: 53352 TUCKAWAY TAVERN Classification: Accts Rec

Ship-to Code: Outside Salesperson Code: 27 27 JASON MANDEL

Address Mailing Address

Sequence No: Voice: Dial Code: Order Confirmation

Contact Name: Fax: Cellular: Pager: User Defined Fields

Job Title: E-Mail Address:

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	ar contact					carolmarkee@yahoo.com	...

To update existing entries, **SELECT** that contact by double-clicking on the sequence number associated with it. It will bring up the contact you selected and allow you to edit the fields.

File Maintenance for Customer Contact

Exit Clear Write Delete

Customer Code: 53352 TUCKAWAY TAVERN Classification: Accts Rec

Ship-to Code: Outside Salesperson Code: 27 27 JASON MANDEL

Address Mailing Address

Sequence No: 001 Voice: Dial Code: Order Confirmation

Contact Name: ar contact Fax: Cellular: Pager: User Defined Fields

Job Title: E-Mail Address: carolmarkee@yahoo.com

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	ar contact					carolmarkee@yahoo.com	...

In this example, the email address was accurate to the account but all highlighted fields needed updating. Once you update or add the information into the contact sequence, you must then click **“WRITE”** to save the inputted data to the Accounts Receivable section.

Exit Clear Write Delete

Customer Code: 53352 TUCKAWAY TAVERN Classification: Accts Rec

Ship-to Code: Outside Salesperson Code: 27 27 JASON MANDEL

Address Mailing Address

Sequence No: 001 Voice: (603) 583-1918 Dial Code: Order Confirmation

Contact Name: Carol Markee Fax: Cellular: Pager: User Defined Fields

Job Title: Bookkeeper E-Mail Address: carolmarkee@yahoo.com

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	ar contact					carolmarkee@yahoo.com	...

This will result in the following appearance when complete:

Customer Code:	53352	TUCKAWAY TAVERN	Classification:	Accts Rec
Ship-to Code:		Outside Salesperson Code:	27	27 JASON MANDEL
<b>Address</b> <input type="text"/> <input type="text"/> <input type="text"/> State: <input type="text"/> Zip Code: <input type="text"/>		<b>Mailing Address</b> <input type="text"/> <input type="text"/> <input type="text"/> State: <input type="text"/> Zip Code: <input type="text"/>		
Sequence No:	001	Voice:	(603) 583-1918	Dial Code: <input type="text"/>
Contact Name:	Carol Markee	Fax:	<input type="text"/>	Order Confirmation: <input type="text"/>
Job Title:	Bookkeeper	Cellular:	<input type="text"/>	
E-Mail Address:	carolmarkee@yahoo.com	Pager:	<input type="text"/>	User Defined Fields

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	Carol Markee	(603) 583-1918				carolmarkee@yahoo.com	...

To add a new contact, input the next available number in the **“SEQUENCE NU”** box. In this example, the next available number is 002. Once you enter a new sequence number, all fields will become active and you can input data for the contact. Be sure to once again, **WRITE**, on the tab.

Customer Code:	53352	TUCKAWAY TAVERN	Classification:	Accts Rec
Ship-to Code:		Outside Salesperson Code:	27	27 JASON MANDEL
<b>Address</b> <input type="text"/> <input type="text"/> <input type="text"/> State: <input type="text"/> Zip Code: <input type="text"/>		<b>Mailing Address</b> <input type="text"/> <input type="text"/> <input type="text"/> State: <input type="text"/> Zip Code: <input type="text"/>		
Sequence No:	002	Voice:	<input type="text"/>	Dial Code: <input type="text"/>
Contact Name:	<input type="text"/>	Fax:	<input type="text"/>	Order Confirmation: <input type="text"/>
Job Title:	<input type="text"/>	Cellular:	<input type="text"/>	
E-Mail Address:	<input type="text"/>	Pager:	<input type="text"/>	User Defined Fields

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	Carol Markee	(603) 583-1918				carolmarkee@yahoo.com	...

All information is now in place when looking up **Accounts Receivable** contacts in ProVisions.

The screenshot shows a software interface for managing customer accounts. At the top, there are icons for Exit, Clear, Write, and Delete. The main form contains several input fields: Customer Code (53352), Ship-to Code, Outside Salesperson Code (27), Classification (Accts Rec), Address, Mailing Address, Sequence No, Contact Name, Job Title, E-Mail Address, Voice, Fax, Cellular, Pager, and Dial Code. A 'User Defined Fields' button is also present. At the bottom, there is a table with columns: Seq, Contact Name, Voice Phone, Ext, Fax Number, Ext, E-mail, and Cellular Number. The table contains two rows of data.

Seq	Contact Name	Voice Phone	Ext	Fax Number	Ext	E-mail	Cellular Number
001	Carol Markee	(603) 583-1918				carolmarkee@yahoo.com	
002	Paige Riley - starts 7/1/24	(603) 583-1918					

Exit and **“WRITE”** one more time to guarantee saving the information to the customer account.

The screenshot shows a window titled 'File Maintenance for Customer Master File'. It has a toolbar with Exit, Clear, Write (highlighted in yellow), and Delete buttons. The main form is divided into five tabs: 1. General Information, 2. A/R Sales Information, 3. Credit Information, 4. Parameters, and 5. Custom Data. The 'General Information' tab is active, showing fields for Customer Code (53352), Name (TUCKAWAY TAVERN), Address 1 (58 ROUTE 27), Address 2, City (RAYMOND), State (NH), Address 3, Address 4, Zip Code (03077), Country Code (USA), Telephone ((603) 244-2431), Fax Number ((603) 244-2481), 1st Contact (PAUL SIMBLIARIS), Password, Remote User Override, Acronym (TUCKAWAY - NH), Cross Ref ID, Ship Location, Bill to Customer, E-Mail Address, Check Name, Last Maintained (06/05/24), Vendor Code, Our Vendor Code, Remit to Address, Duns ID, Vat Number, and Automatic Credit Card ID. An 'Edit' button is located at the bottom right. A status bar at the bottom shows 'Enter/select a customer code' and 'User: ECOR (T\_535;62080) 0001/DOLE'.