cynergi | suite™

Store Manual

HIGHTOUCH TECHNOLOGIES
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Chapter 2: Customers

Add a New Customer

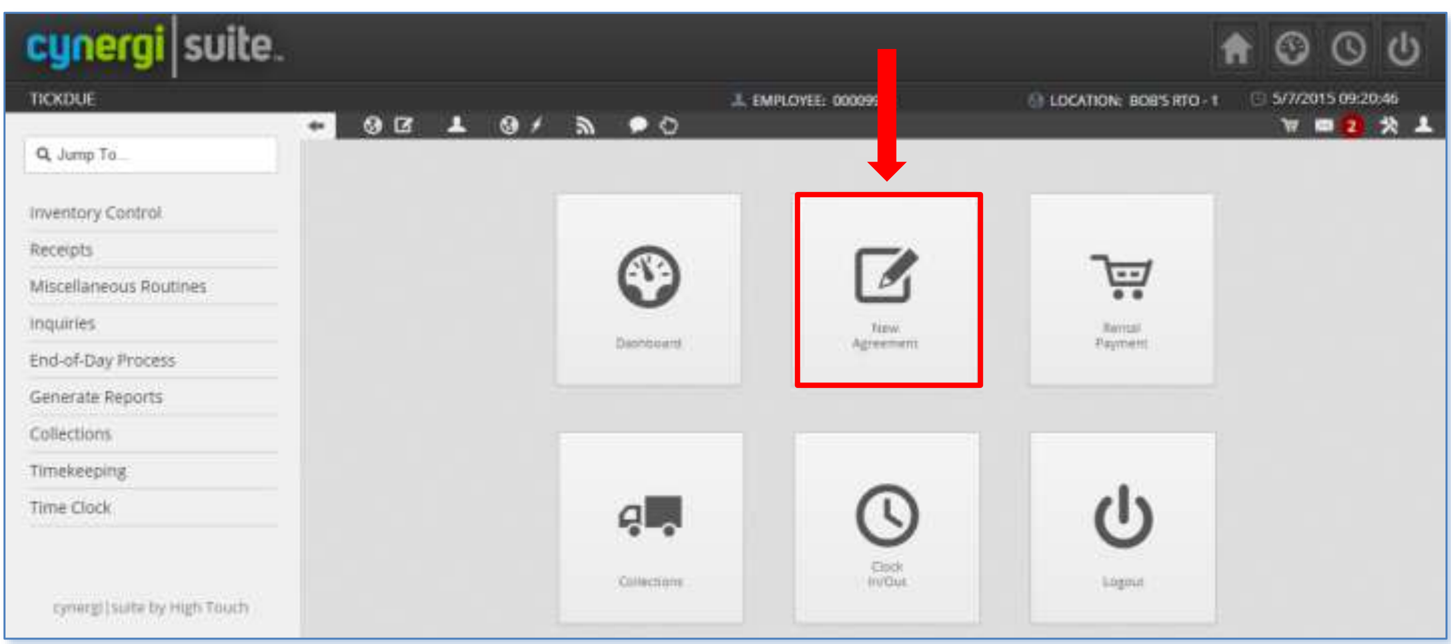
There are several ways to add a new customer. When the **ADD CUSTOMER** button 

appears on the screen, a new customer can be entered. The following *Customer Search* areas of the system are where a new customer can be entered:

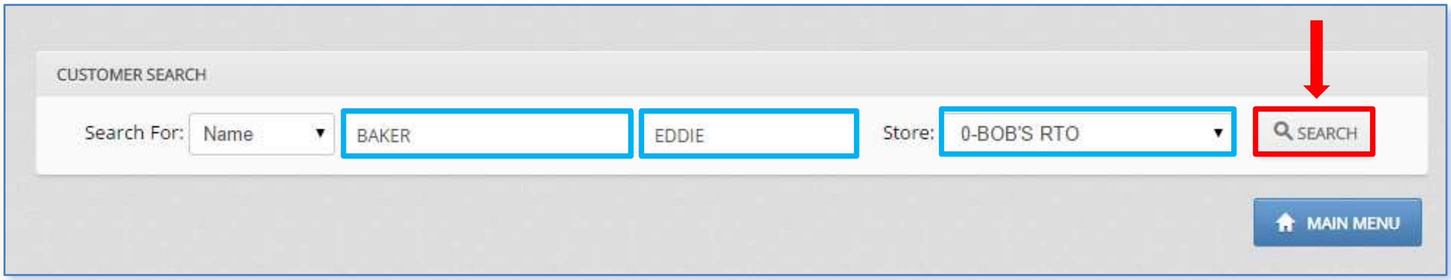
- New Agreement
  - By selecting the **New Agreement** icon from the cynergi|suite Home Screen, a customer entry program (**NEWIND**) will be called. This option allows for fast and shortened customer information entry.
  - The standard customer entry program (**NEW**) is typically called if a new agreement entry is selected from the menu bar on the left side of the screen. This option allows for the longer, more detailed customer information entry.
- Rental Payment
- Cash Sale
- Customer Maintenance

Aside from the New Agreement (**NEWIND**) program, the process is the same for these other areas to add a new customer.
Please Note: The example below will demonstrate adding a customer while creating a new Rental Agreement.

From the main cynergi|suite Home Screen, click on the **New Agreement** button.

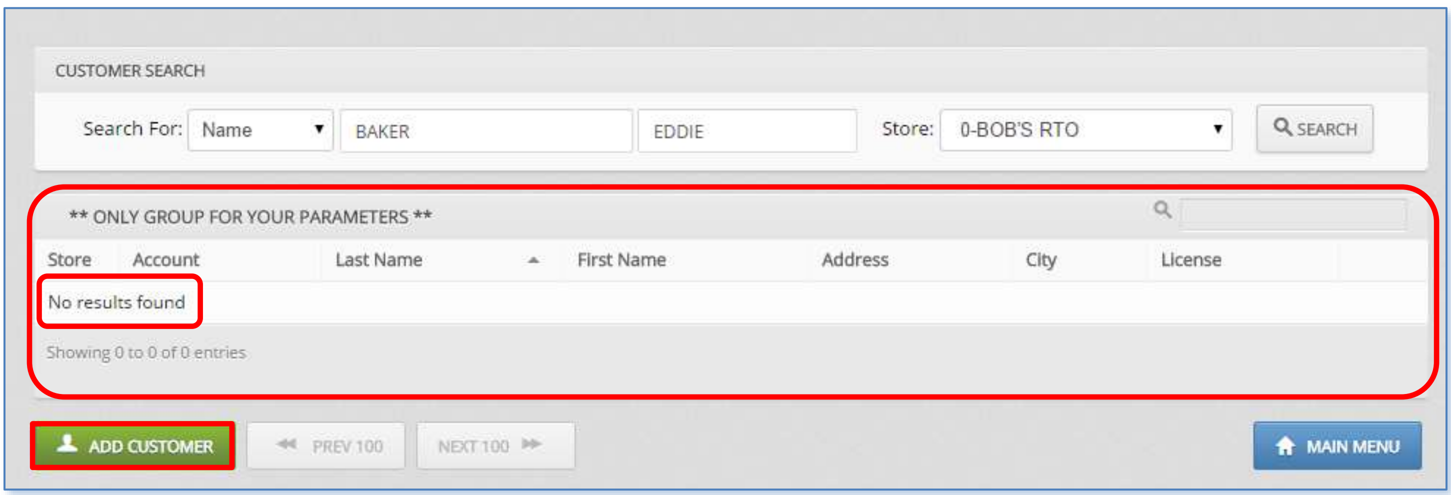


The *Customer Search* screen will open. It is highly advised to enter the customer's full **Last** and **First Name** for the initial search and set the ***Store*** to **0**. Setting the store to zero will allow the broadest search as it will search through all customers in all stores. This will ensure the most thorough customer search and help avoid duplicate customer entries.



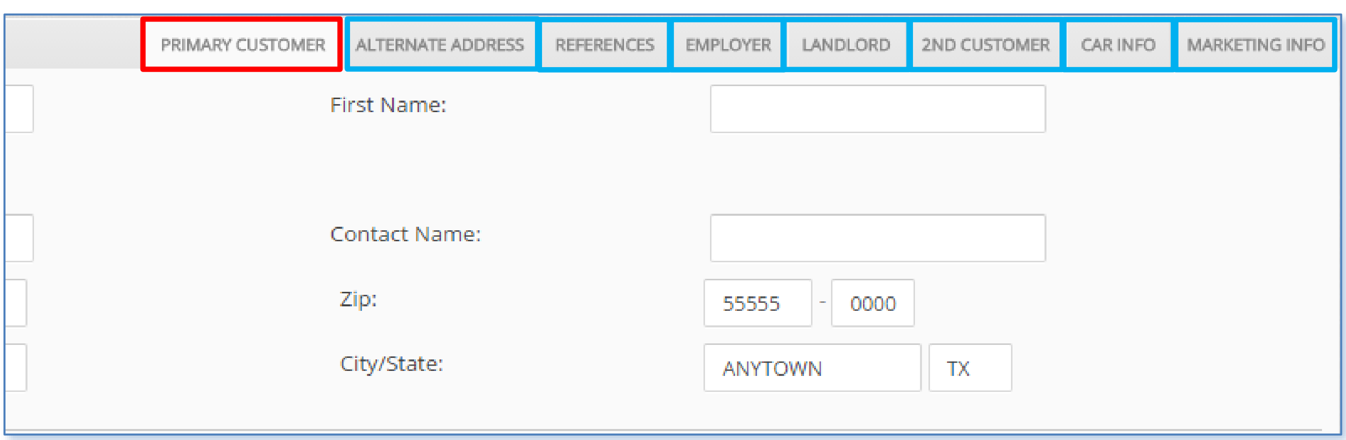
The results of the customer search will be displayed.
Please Note: If there are other customers with the same name, you may need to click the customer name and verify that the customer you are wanting to add is not already in the system at another store.

If *No Results Found* appears, then the customer search did not find a match. With either scenario, click the **ADD CUSTOMER** button to continue.



The *New Customer Record* will display on the screen and is ready for input. The **TAB** or **ENTER** key may be used to move through the fields, or you can use the mouse to click on each individual field to enter the necessary information.

There are multiple Tabs across the top of the screen where additional customer information may be added by clicking on the appropriate tab.

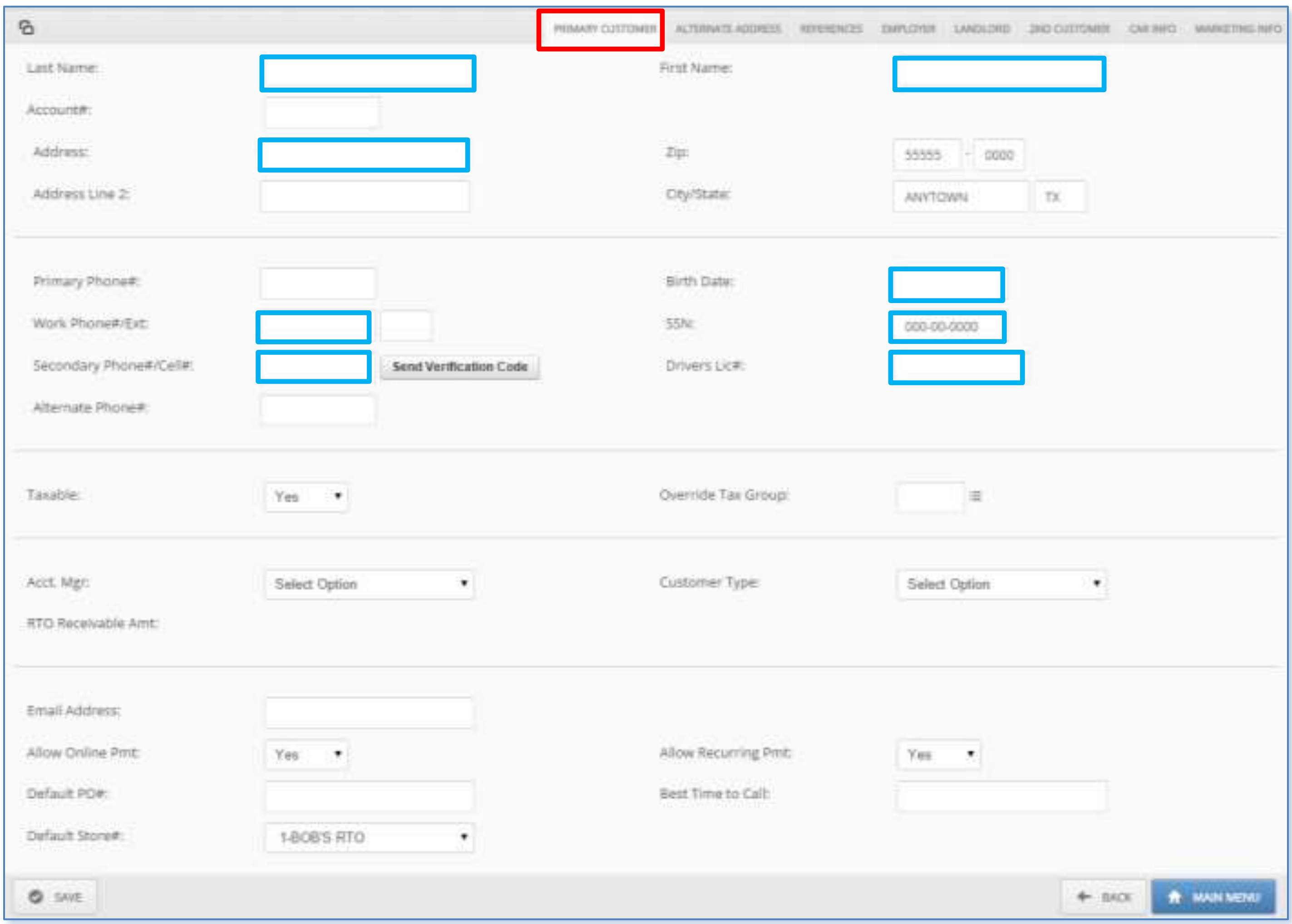


Customer Information Tabs

When clicking on the **ADD CUSTOMER** button, the *New Customer Record* will display on the screen and is ready for input. There are eight tabs across the top of the screen where additional customer information may be added by clicking on the appropriate tab. The screen will default to the *Primary Customer* information tab. To allow for quick customer entry, the other tabs are not required to be filled out. When finished updating any of the tabs, simply click the **SAVE** button at the bottom left side of each screen to save your changes.

Primary Customer Tab

The fields highlighted in **blue** are required fields in the Primary Customer tab. The **TAB** or **ENTER** key may be used to move through the fields, or you can use the mouse to click on each individual field to enter the necessary information. *Please Note: If you do not have the required information, a "**1**" can be entered into the field, allowing you to move past the required field.*



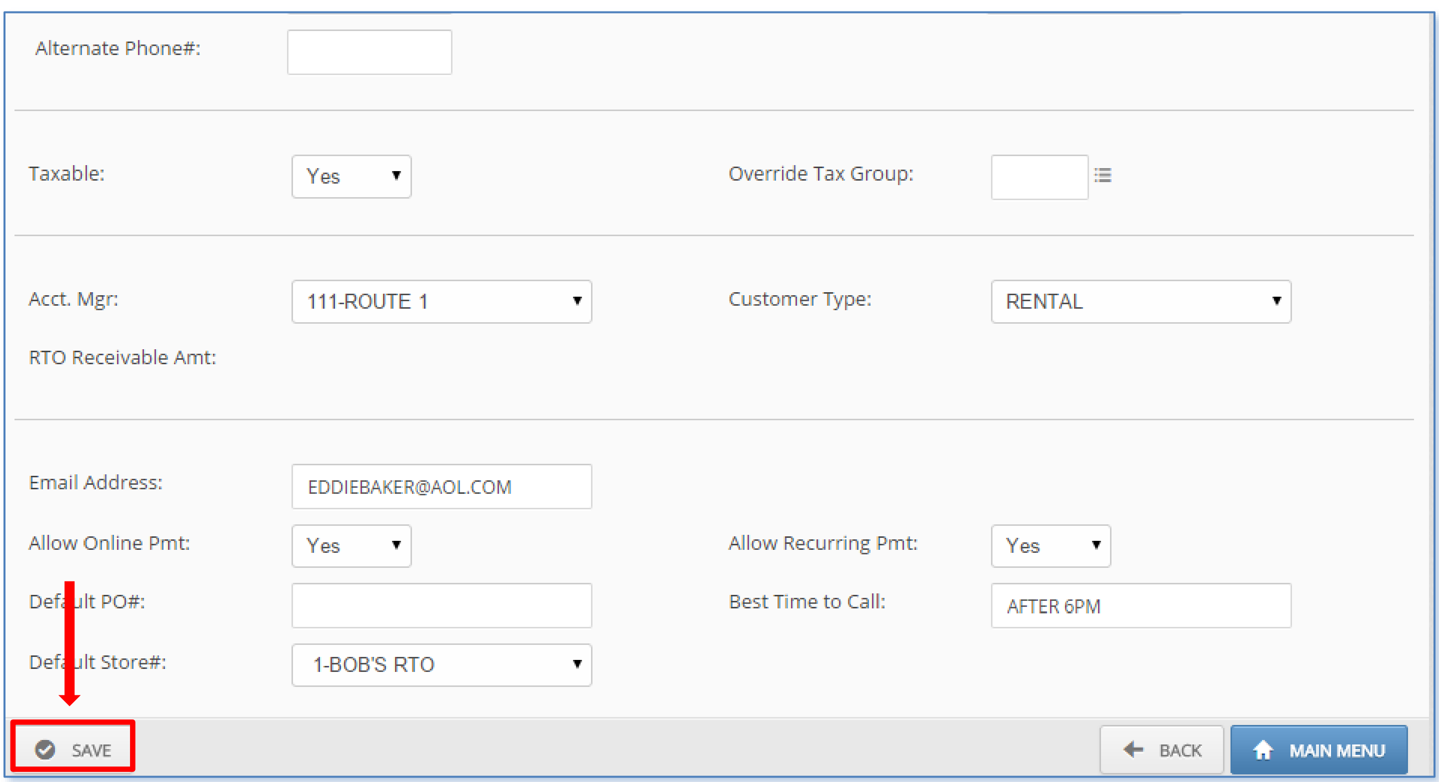
**Required Fields*

- ***Last Name =** *Customer last name*
- ***First Name =** *Customer first name*
- **Account #** = *Customer number, can be used for customer search and is automatically assigned*
- ***Address =** *Customer address*
- **Zip** = *will default to the store's zip code*
- **Address Line 2** = *Use for additional address information if needed*

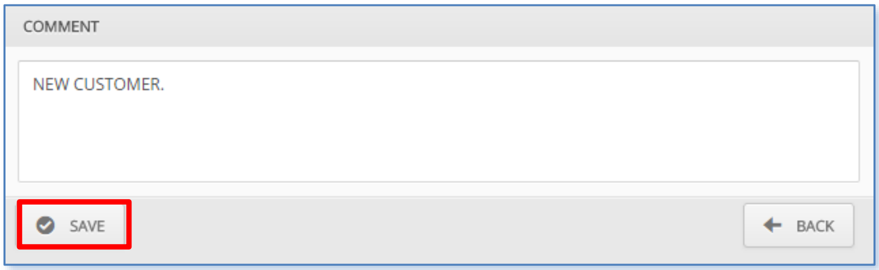
- **City/State** = *will default to the store's city and state*
- ***Primary Phone** = *10 digit (000)000-0000*
- ***Birth Date** = *MM/DD/YYYY*
- ***Work Phone#/Ext** = *10 digit (000)000-0000*
- ***SSN** = *Social Security Number*
- **Secondary Phone#/Cell#**
- ***Drivers Lic#**
- **Alternate Phone# =** *10 digit (000)000-0000*
- **Taxable** = *Yes or No*
    - *If No, it will prompt for a Tax ID # and default to an Exempt Tax Group*
    - *If Yes, the default tax group will be assigned*
- **Override Tax Group** = *Allows to change from the default tax group if needed*
- **Acct. Mgr.** = *Select the collections "route" for the customer*
- **Customer Type** = *Pick list of customer types used for reporting*
- **RTO Receivable Amt:** *Will display the customer's receivable amount (over/under payment)*
- **Email Address =** *Customer Email address*
- **Allow Online Pmt** = *Yes or No, for use with online payment feature*
- **Allow Recurring Pmt** = *Yes or No, for use with Recurring payment feature*
- **Default PO# =** *N/A*
- **Best Time to Call =** *Free text field (20 characters available)*
- **Default Store =** *Defaults to store logged into when customer is created*

When you have completed entering the *Primary Customer* information, you may either click on any of the other tabs to add additional information or come back to the customer record at a later time to make the other customer updates.

Click the **SAVE** button at the bottom left side of the screen to save your changes and continue through the process that you started (in this example, you will continue through the steps of adding a new agreement).



Upon clicking the **SAVE** button, the *Comment* screen will open allowing optional entry of notes for the customer. Click **SAVE** at this prompt to continue.



The *New Agreement Add* screen will open. At this point the new agreement creation process begins. For information on how to create a new rental agreement, please reference the **Add a New Agreement** section of **Chapter 3: Agreements**).

Alternate Address Tab

This tab can be used for a mailing address or an additional alternate address. This tab does not contain any required fields.

References Tab

Up to **six Personal References** can be added under this tab. This tab does not contain any required fields.

- **Last Name =** *Reference last name*
- **First Name =** *Reference first name*
- **Address =** *Reference address*
- **Address Line 2** = *Use for additional address information if needed*
- **City/State** = *Will default to the store's city and state*
- **Zip** = *Will default to the store's zip code*
- **Phone** = *10 digit (000)000-0000*
- **Map Code =** *Free Text field for map code coordinates*
- **Relationship =** *Relationship to customer (35 characters available)*

Employer Tab

This tab is for the *Primary Customer's* employment information. This tab does not contain any required fields.

- **Company Name =** *Name of customer's employer*
- **Address =** *Employer's address*
- **Address Line 2** = *Use for additional address information if needed*
- **City/State** = *Will default to the store's city and state*
- **Zip** = *Will default to the store's zip code*
- **Map Code =** *Free Text field for map code coordinates*
- **Paydays =** *Free Text field (20 characters available)*
- **Frequency =** *Pick list selection: Weekly, Bi-Weekly, Monthly, or Semi-Monthly*
- **Income =** *Free Text (10 characters available)*
- **Full/Part Time =** *Full (F) or Part-Time (P)*
- **Shift =** *Free Text field (15 characters available)*
- **Date Employed =** *Beginning employment date, MM/DD/YY*
- **Position =** *Free Text field (20 characters available)*
- **Supervisor =** *Free Text field (25 characters available)*
- **Comment =** *Free Text field (35 characters available)*

Landlord Tab

This tab is for *Landlord Information*, if applicable. This tab does not contain any required fields.

- **Apartment =** *Apartment or Property Management Company*
- **Manager/Landlord =** *Apartment manager or landlord's name*
- **Last Name** = *Landlord's last name*
- **First Name =** *Landlord's first name*
- **Monthly Payment =** *Monthly rent or mortgage payment*
- **Mortgage Company =** *Name of mortgage company if buying the property*
- **Address =** *Landlord's address*
- **Address Line 2 =** *Landlord's additional address information*
- **City/State** = *Will default to the store's city and state*
- **Zip** = *Will default to the store's zip code*
- **Phone# =** *Landlord's phone number*
- **Map Code =** *Free Text field for map code coordinates*

2nd Customer Tab

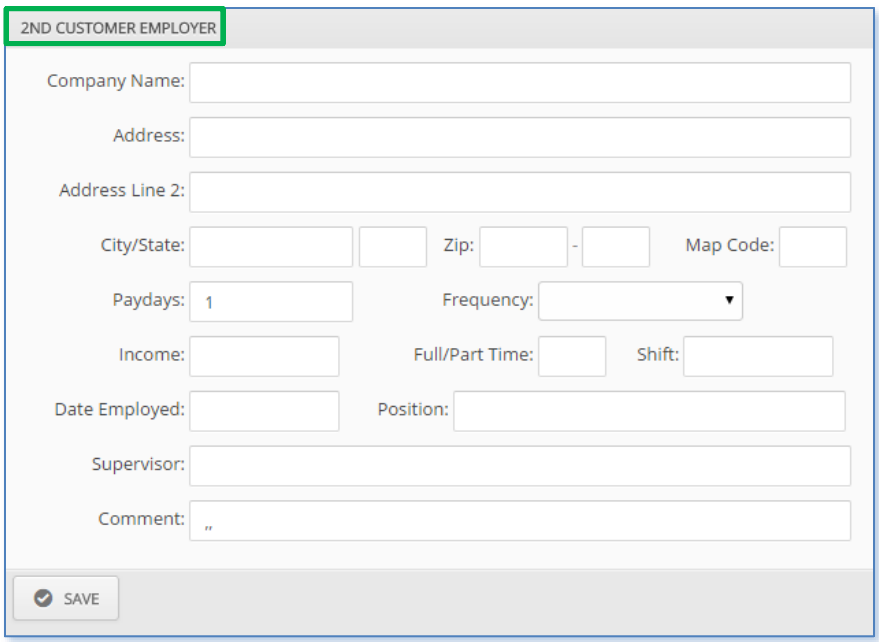
This tab is for the *2nd Customer Information*. This tab does not contain any required fields.

- **Last Name =** *2nd Customer's last name*
- **First Name =** *2nd Customer's first name*
- **Address =** *2nd Customer's address*
- **Address Line 2** = *Use for additional address information if needed*
- **City/State**
- **Zip**
- **Phone# =** *10 digit (000)000-0000*
- **Map Code** = *Free Text field for map code coordinates*
- **Work Phone#/Ext** = *10 digit (000)000-0000*
- **Birth Date** = *2nd Customer MM/DD/YYYY*
- **SSN** = *2nd Customer's Social Security number*
- **Drivers Lic#** = *2nd Customer's driver's license number*
- **Relationship =** *Relationship to 1st Customer*

Please Note: The 2nd Customer's employment information can be entered by clicking on the ***EMPLOYER*** *button at the bottom left corner of the screen.*

2nd Customer Employer Tab

The Employer screen is accessible from the *2nd Customer* tab and is specific to the *Secondary Customer's Employment Information*. This screen does not contain any required fields.



- **Company Name =** *Name of 2nd Customer's employer*
- **Address =** *Employer's address*
- **Address Line 2** = *Use for additional address information if needed*
- **City/State** = *Will default to the store's city and state*
- **Zip** = *Will default to the store's zip code*
- **Map Code =** *Free Text field for map code coordinates*
- **Paydays =** *Free Text field (20 characters available)*
- **Frequency =** *Pick list selection: Weekly, Bi-Weekly, Monthly, or Semi-Monthly*
- **Income =** *Free Text (10 characters available)*
- **Full/Part Time =** *Full (F) or Part-Time (P)*
- **Shift =** *Free Text field (15 characters available)*
- **Date Employed =** *Beginning employment date, MM/DD/YY*
- **Position =** *Free Text field (20 characters available)*
- **Supervisor =** *Free Text field (25 characters available)*
- **Comment =** *Free Text field (35 characters available)*

Car Info Tab

The *Primary* and *Secondary Customer's Vehicle Information* may be entered under this tab. This screen does not contain any required fields.

- **License Plate#** = *15 characters available*
- **VIN** = *Vehicle Identification Number, (25 characters available)*
- **Year** = *4-digit year*
- **Lienholder** = *Name of lienholder, if applicable (25 characters available)*
- **Make** = *Vehicle Make (25 characters available)*
- **Phone#** = *Lienholder's phone number, 10 digit (000)000-0000*
- **Model** = *Vehicle Model (25 characters available)*
- **Payment Amount** = *Periodic Payment Amount, Weekly, Bi-Weekly, Monthly, or Semi-Monthly*
- **Desc/Color** = *Description and/or color of vehicle (30 characters available)*
- **Purchase Date** = *MM/DD/YY*

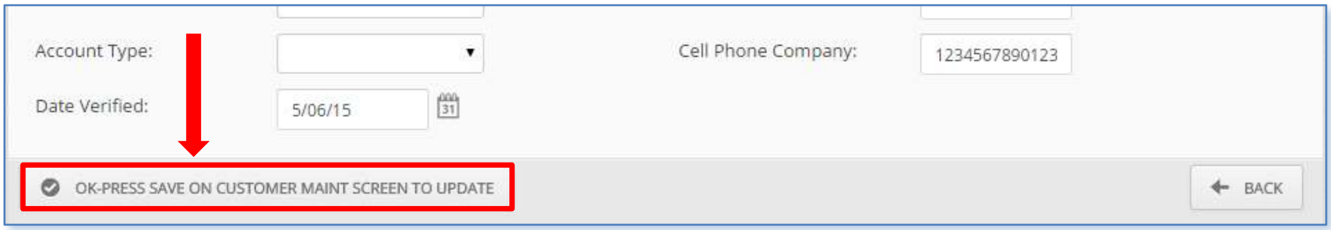
Marketing Info Tab

The *Marketing Information* is optional. This screen does not contain any required fields.

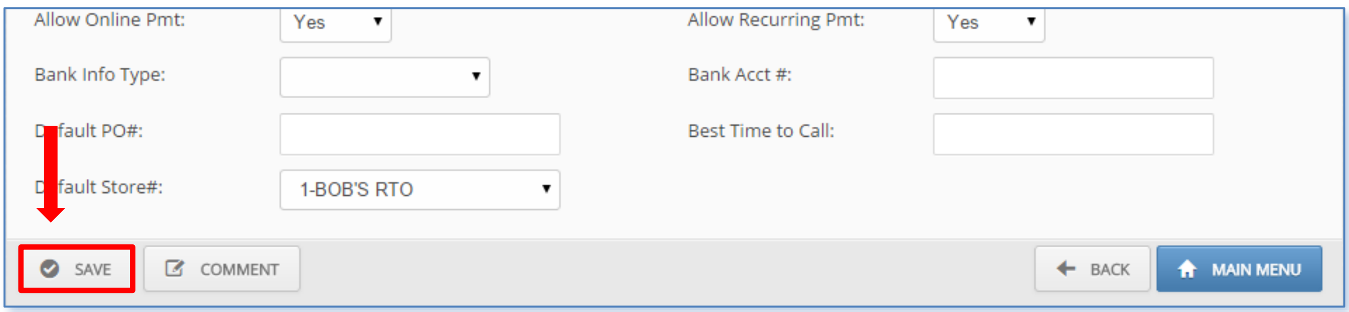
- **Own or Rent Home** = *Pick list*
- **Move In Date** = *Date customer moved in MM/DD/YY*
- **Education** = *Pick list*
- **Miles From Store** = *Pick list*
- **Gender** = *Pick list*
- **Marital Status** = *Pick list*
- **Race** = *Pick list*
- **Rented Before** = *Pick list*
- **Bankruptcy** = *Pick list*
- **Referral Customer#** = *Enter the referring customer number here*
- **Referral Date** = *Date customer was referred MM/DD/YY*
- **Referral Name** = *Referring customer's name*
- **Advertising Source** = *Pick list*
- **Marketing Opt Out** = *Yes or No, Does this customer wish to receive marketing program calls?*
- **Opt in to Calls** = *Yes or No, Does this customer wish to receive electronic marketing and collection calls?*
- **Opt Out Pymt Reminder** = *Yes or No, Does this customer wish to receive electronic payment reminder calls?*
- **# Monthly Bills** = *Number of monthly bills the customer has (99 max)*
- **Bank Account#** = *25 digits available*
- **Bank Name** = *Pick list*
- **Bank Location** = *25 characters available*
- **Account Type** = *Pick list*
- **Cell Phone Company** = *25 characters available*
- **Date Verified** = *MM/DD/YY*

<u>Please Use Caution</u>: Upon making any changes to the Marketing tab, there are two steps required to save the information.

1) Click the **<u>OK</u>** button in the bottom left corner of the screen.



2) Click the **<u>SAVE</u>** button on the *Primary Customer* tab at the bottom left side of the screen to save your changes and continue through the process that you started.

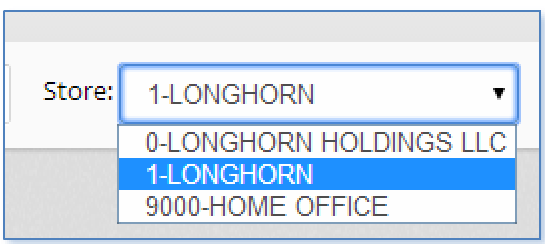


Customer Search and Change Customer Information

From the ***Rental Payment*** screen, you have the option to search for a customer by Name, Account #, Address, License #, or Phone #.

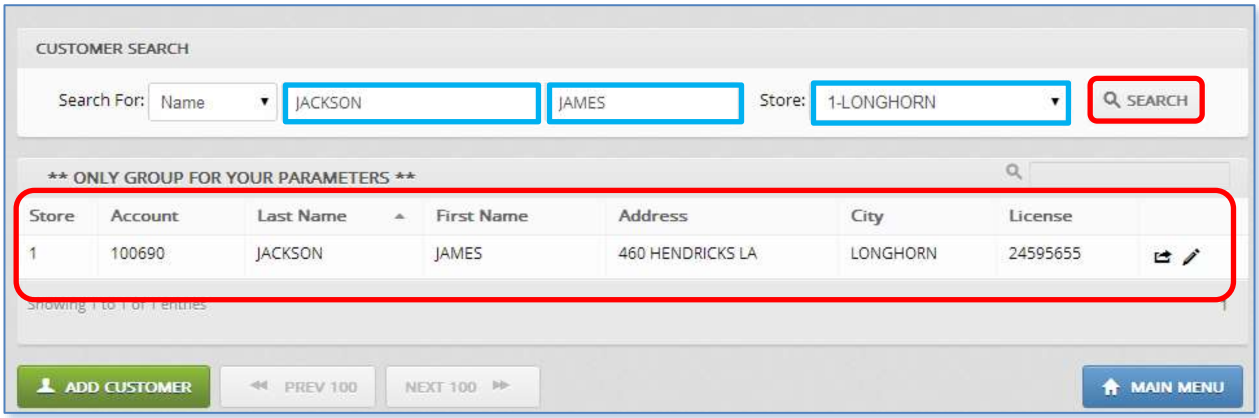
In this example we will use the ***Name*** setting for the search. Enter the **Last Name** first, then the **First Name**, and then select the **Store/Location** from which you would like to search.

It is important to understand the significance of the **Store/Location** options. In this case, we have a company with one store location. However, there are multiple locations in the drop-down list.

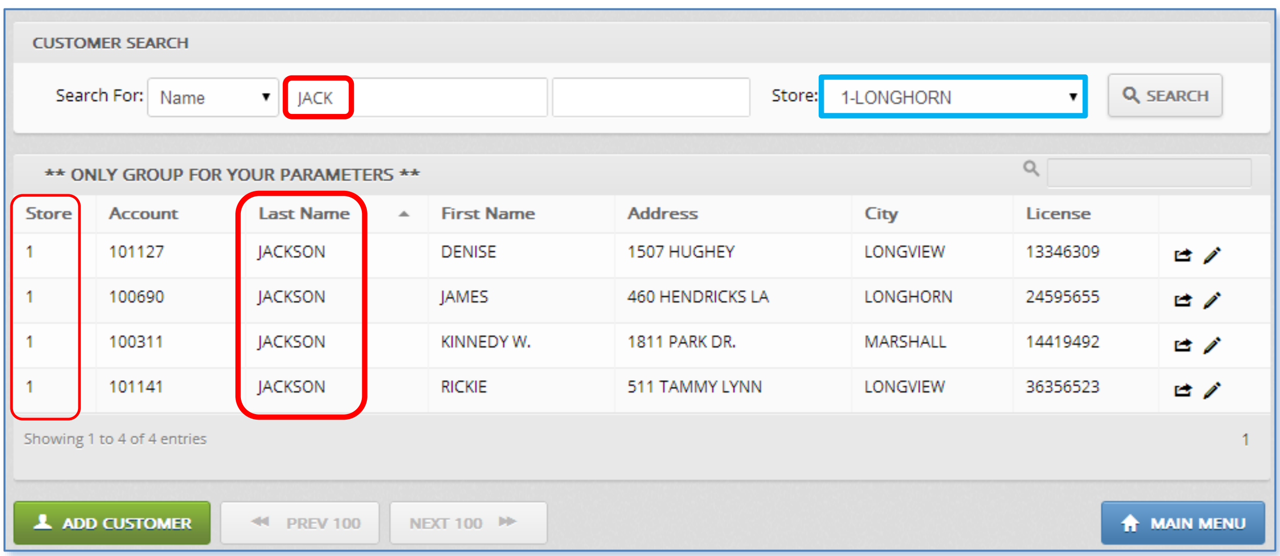


- **Location 0-LONGHORN HOLDINGS LLC** = The Entire Company
  Used when searching for an In-Active Customer, or if you are not sure which store the Customer may be renting at (If Multiple Stores exist). Location 0 searches the Entire Company.
- **Location 1-LONGHORN =** The Store location you are logged into
  This will usually be the store to which the employee is assigned. Searching by this setting would search the Customer File for an active Customer named James Jackson and it will only be looking in Store 1.
- **Location 9000** = Home Office
  Only Home Office Personnel will be using this option. It will be their default location setting.

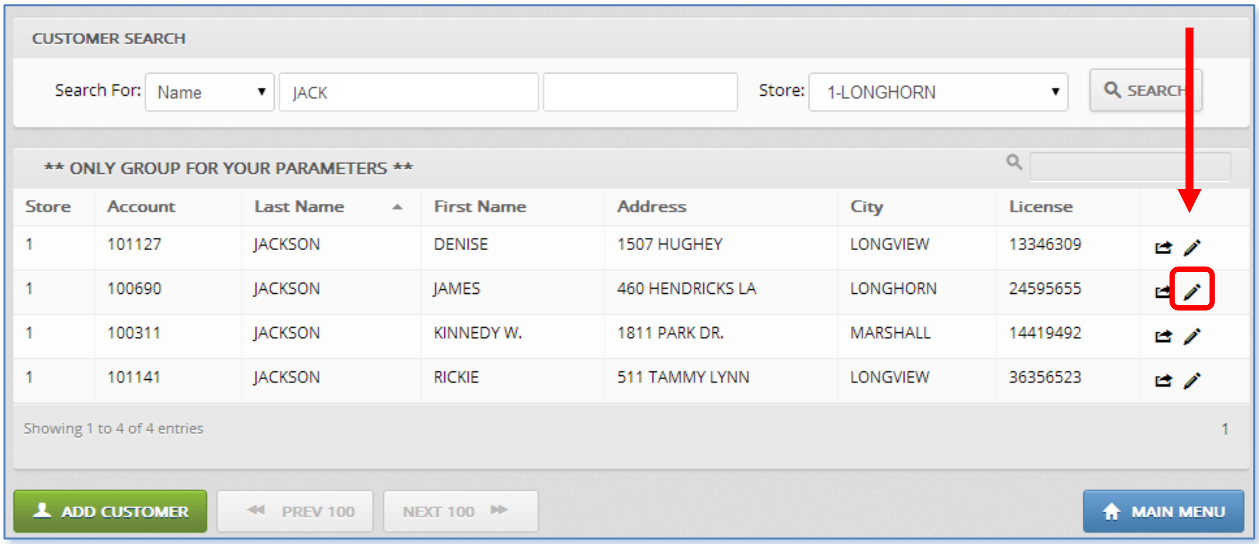
For this example, we set the store to **1-LONGHORN** and entered **JACKSON**, **JAMES** and then clicked on the **SEARCH** button. The search results appear just below the criteria you entered.



Searching by a Partial Name is also possible. For example, we can enter JACK for the last name and begin the search. The search will return all active customers in store 1 (LONGHORN) with last names beginning with JACK.

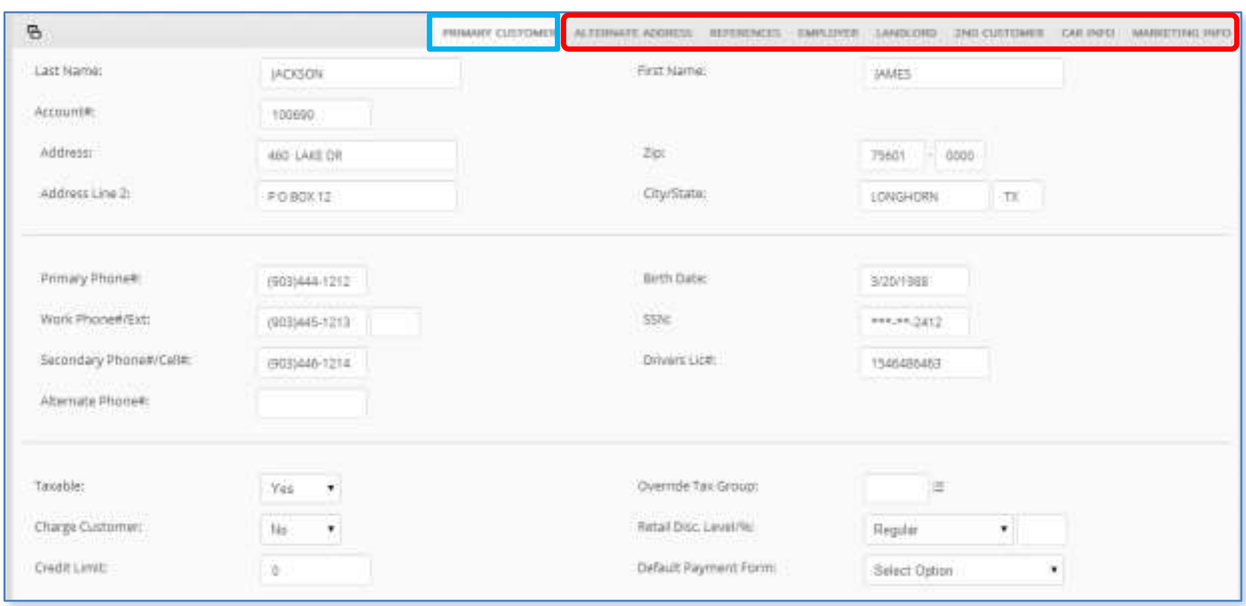


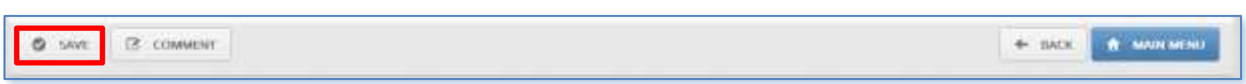
When you have found the customer you are looking for and would like to change any of the customer information, click on the **Pencil** icon on the far right side of the screen.



The Customer Record opens and you are ready for editing. Depending on your Security settings, you will be able to edit the fields on the Customer Record. You can **TAB** through the fields or use the mouse to click on each field you would like to change. Click **SAVE** on the bottom left side of the screen to save your changes.

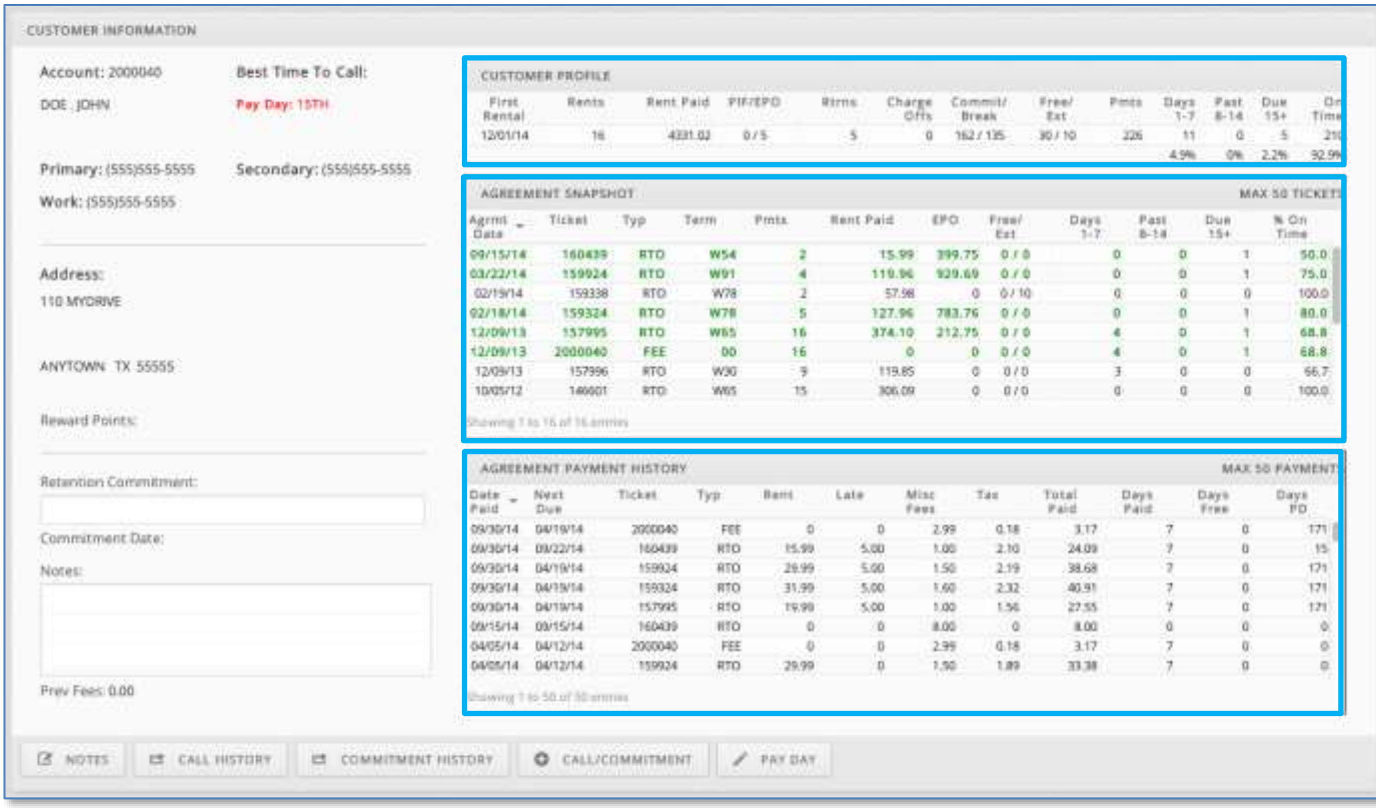
Please Note: There are multiple Tabs across the top of the screen that contain additional customer information that you may access by clicking on the appropriate Tab.





Customer, Agreement, and Payment History Statistics

Within the Customer Information section of the Rental Payment (**RP**) screen and the Collections screen, there are Customer, Agreement, and Payment History statistics available.



Feature Benefits

- Customer Profile section provides several key statistics to help you determine who your excellent customers are and which customers need a little more attention or are more at risk.
- Agreement Snapshot provides a listing of the last fifty active/inactive Rental Agreements on one screen. All this information is easily accessible from this screen so you will not need to go between open Rental Agreement Payments screen and Closed Rental Agreement Payments screen.
- Payment History section will display the last fifty payments for all agreements combined on one screen. This information will provide you better details on the customer’s current payment trends among all Rental Agreements.
- The additional information allows employees to go to one area of the system to review customers’ statistical information.

Customer Profile

The top line of this section represents a **total** of all Agreement/Ticket Types listed.

These statistics are broken into five Agreement Type line items. Only Applicable Agreement Types will appear on the screen. For example, if a customer lacks an A/R, SALE, or RTR Agreement, then the only Agreement Types that will appear are the RTO and FEE Types.

- **RTO** = Standard Rent to Own Agreement
- **FEE** = A Fee Agreement
- **RTR** = Rent to Rent Agreement
- **A/R** = Accounts Receivable Agreement
- **SALE** = Sale Agreement

CUSTOMER PROFILE

	First	Count	Amt Paid	PIF/EPO	Rtrns	Charge Offs	Commit/ Break	Free/ Ext	Pmts	Days 1-7	Past 8-14	Due 15+	On Time
TOTAL	07/22/15	2	663.40	0 / 0	0	0	1 / 0	0 / 0	14	0	2	0	12
										0%	14.3%	0%	85.7%
RTO		1	587.94	0 / 0	0	0		0 / 0	7	0	1	0	6
										0%	14.3%	0%	85.7%
FEE		1	75.46					0 / 0	7	0	1	0	6
										0%	14.3%	0%	85.7%

CUSTOMER PROFILE

	First	Count	Amt Paid	PIF/EPO	Rtrns	Charge Offs	Commit/ Break	Free/ Ext	Pmts	Days 1-7	Past 8-14	Due 15+	On Time
TOTAL	08/03/13	3	610.54	0 / 0	1	0	14 / 13	0 / 0	1	0	0	0	1
										0%	0%	0%	100.0%
RTO		1	15.00	0 / 0	1	0		0 / 0	1	0	0	0	1
										0%	0%	0%	100.0%
A/R		1	50.00	0 / 0	0	0		0 / 0	0	0	0	0	0
										0%	0%	0%	100.0%
SALE		1	545.54					0 / 0					

A detailed view of the Customers Statistics section includes the following statistics:

CUSTOMER PROFILE

	First	Count	Amt Paid	PIF/EPO	Rtrns	Charge Offs	Commit/ Break	Free/ Ext	Pmts	Days 1-7	Past 8-14	Due 15+	On Time

- **First** = First Known Rental Date
- **Count** = Total Number of Rental Agreement the customer has taken out (includes active and in-active)
- **Amt Paid** = Total Amount of Rent Paid on all agreements (includes active and in-active)
- **PIF/EPO** = the number of Paid In Full /Early Pay Off agreements
- **Rtrns** = Total number of Returned rental agreements
- **Charge Offs** = Total number of Charged Off agreements (Skips, etc.)
- **Commit/Break** = Total number of Commitments/Broken Commitments
- **Free/Ext** = Free-time days/Extension days (Given on all agreements)
- **Pmts** = Number of payments made on all agreements
- **Days 1-7** = Number of times late in the 1-7 days category
- **Days 8-14** = Number of times late in the 8-14 days category
- **Days 15+** = Number of times late in the 15+ days category
- **On Time** = Payments made on-time and the percentage

Agreement Snapshot

This section contains the last fifty Agreements by date. Green text indicates currently open agreements. Black text indicates in-active agreements. Clicking on the header titles will sort this section within that header order selected in either ascending or descending order. Clicking on the scroll bar will take you to the other agreements that are not defaulted within the window.

AGREEMENT SNAPSHOT — MAX 50 TICKETS

Agrmt Date	Ticket	Typ	Term	Pmts	Rent Paid	EPO	Free/ Ext	Days 1-7	Past 8-14	Due 15+	% On Time
09/15/14	160439	RTO	W54	2	15.99	399.75	0 / 0	0	0	1	50.0
03/22/14	159924	RTO	W91	4	119.96	929.69	0 / 0	0	0	1	75.0
02/19/14	159338	RTO	W78	2	57.98	0	0 / 10	0	0	0	100.0
02/18/14	159324	RTO	W78	5	127.96	783.76	0 / 0	0	0	1	80.0
12/09/13	157995	RTO	W65	16	374.10	212.75	0 / 0	4	0	1	68.8
12/09/13	2000040	FEE	00	16	0	0	0 / 0	4	0	1	68.8
12/09/13	157996	RTO	W30	9	119.85	0	0 / 0	3	0	0	66.7
10/05/12	146601	RTO	W65	15	306.09	0	0 / 0	0	0	0	100.0

Showing 1 to 16 of 16 entries

Agreement Payment History

This section contains the last fifty payments made by the customer. The default view sorts by the last date paid and is intended for use as a quick reference view. Clicking on the header titles will sort this section within that header order selected in either ascending or descending order. Clicking on the scroll bar will take you to the other agreements that are not defaulted within the window.

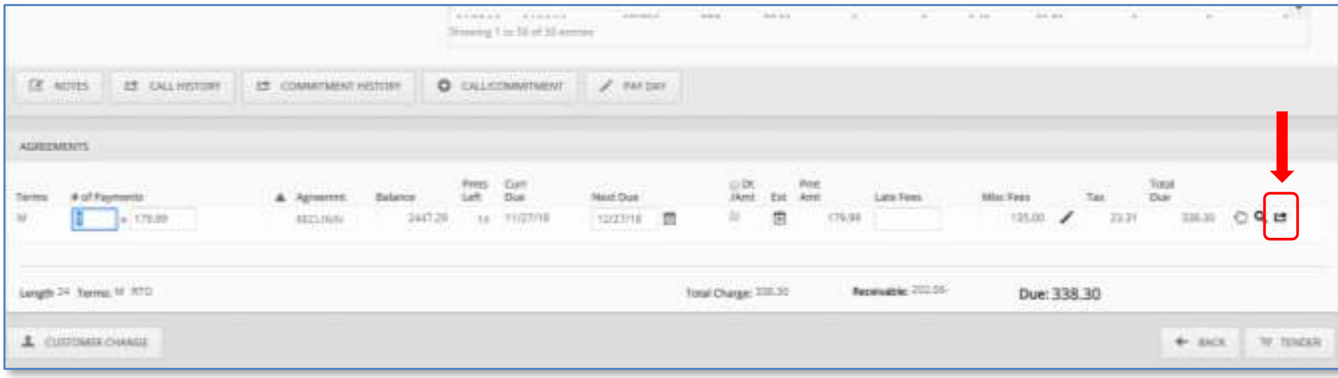
AGREEMENT PAYMENT HISTORY — MAX 50 PAYMENTS

Date Paid	Next Due	Ticket	Typ	Rent	Late	Misc Fees	Tax	Total Paid	Days Paid	Days Free	Days PD
09/30/14	04/19/14	2000040	FEE	0	0	2.99	0.18	3.17	7	0	171
09/30/14	09/22/14	160439	RTO	15.99	5.00	1.00	2.10	24.09	7	0	15
09/30/14	04/19/14	159924	RTO	29.99	5.00	1.50	2.19	38.68	7	0	171
09/30/14	04/19/14	159324	RTO	31.99	5.00	1.60	2.32	40.91	7	0	171
09/30/14	04/19/14	157995	RTO	19.99	5.00	1.00	1.56	27.55	7	0	171
09/15/14	09/15/14	160439	RTO	0	0	8.00	0	8.00	0	0	0
04/05/14	04/12/14	2000040	FEE	0	0	2.99	0.18	3.17	7	0	0
04/05/14	04/12/14	159924	RTO	29.99	0	1.50	1.89	33.38	7	0	0

Showing 1 to 50 of 50 entries

Payment History Statistics

Additional **Agreement Statistical** information is available at the top of the Rental Agreement Payment History screen (**RP**), accessible from the Rental Payment screen and the Closed Rental Payment Inquiry screen.



At the top of the Rental Agreement Payment history screen, there are six columns that provide additional information for review while accessing payment history.

AGREEMENT STATISTICS

Days		# Times Past Due						
Free	Ext	1 - 7	8 - 14	15 +	% On-Time	Original Balance	Remaining Balance	Early Payoff Balance
0	0	0	0	0	100.0	257.40	196.59	196.59 *

*This amount does not include Tax or Past Due Rent or Fees that may apply

AGREEMENT STATISTICS

Days		# Times Past Due						
Free	Ext	1 - 7	8 - 14	15 +	% On-Time	Original Balance	Remaining Balance	Early Payoff Balance
22	17	12	0	3	59.4	2275.00	753.58	414.47 *

*This amount does not include Tax or Past Due Rent or Fees that may apply

The following information is available for each individual Rental Agreement's Payment History:

Days	
Free	Ext
22	17

- **Days <u>Free</u> <u>Ext</u>** – There are two fields under the **Days** column. One will display the number of "**Free**" days given and the other will show the number of "**Extension**" days given.
  - **<u>Free Days</u>** = The number of Free Days given on the Agreement. Calculation: total *Free Payment amounts* divided by the *Daily Rental Rate*.
  - **<u>Extension</u>** = The total number days the *Due Date* has been extended on the Agreement. Extension may also be known as a **Due Date Move** where money is not collected.

# Times Past Due		
1 - 7	8 - 14	15 +
12	0	3

- **# Times Past Due** – Field will display how many late payments (on this agreement) have been made within each Past Due category.
  - The example to the left shows that twelve late payments have been made when the Agreement was between 1 and 7 days past due. No late payments have been made when the Agreement was between 8 and 14 days past due. There are three late payments in the 15+ category.
  - The # Times Past Due breakdown is based upon the categories setup in the **AMRNKMNT** Master Control Record.

% On-Time
59.4

- **% On-Time** – Field displays the percent of payments made that were on-time. A customer with 100% On-time Payments is displayed in green.
  % On-Time Payments Calculation: (*Total # of payments paid*) – *(# of Late Payments paid*) / (*Total # of payments Paid*)

- **Original Balance** – The **Original Agreement Balance**.
- **Remaining Balance** – The **Remaining Balance** of the Agreement.
- **Early Payoff Balance** – The **Early Payoff Amount** (does not include taxes or late fees).
  <u>Please Note</u>: This amount does assume that any past due rent would be paid prior to the Early Payout.

Original Balance	Remaining Balance	Early Payoff Balance
2275.00	753.58	414.47 *

Additional Information

- **Club agreements** will not show balance amounts. They will only display **Free Days**, **Extension Days**, and **# Times Past Due**.
- When viewing Payment History for "**All Agreements**," amounts in the fields shown above will not display. The Payment History Statistics view has been designed to only display the information for each individual Agreement.

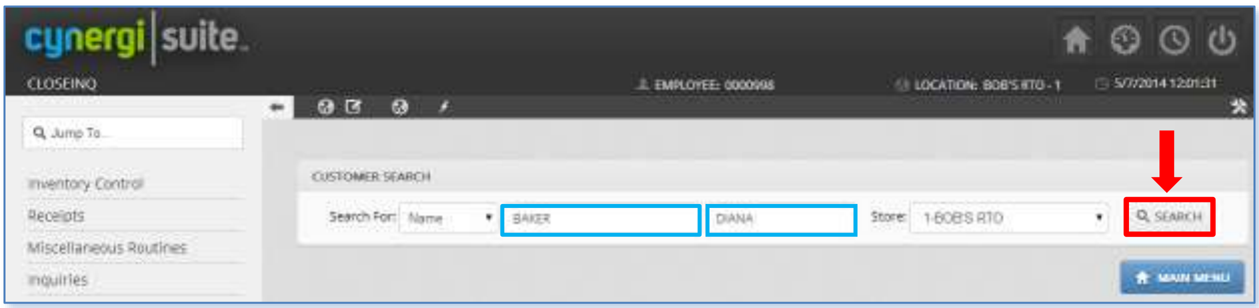
Add, View, and Update Customer Notes

With the **Customer Notes** feature, you have the ability to add special notes to the customer in cynergi|suite. There is also the ability to select whether the note should pop-up to bring attention to the action required. The Customer Notes can be used for many reasons. Below are a few examples.

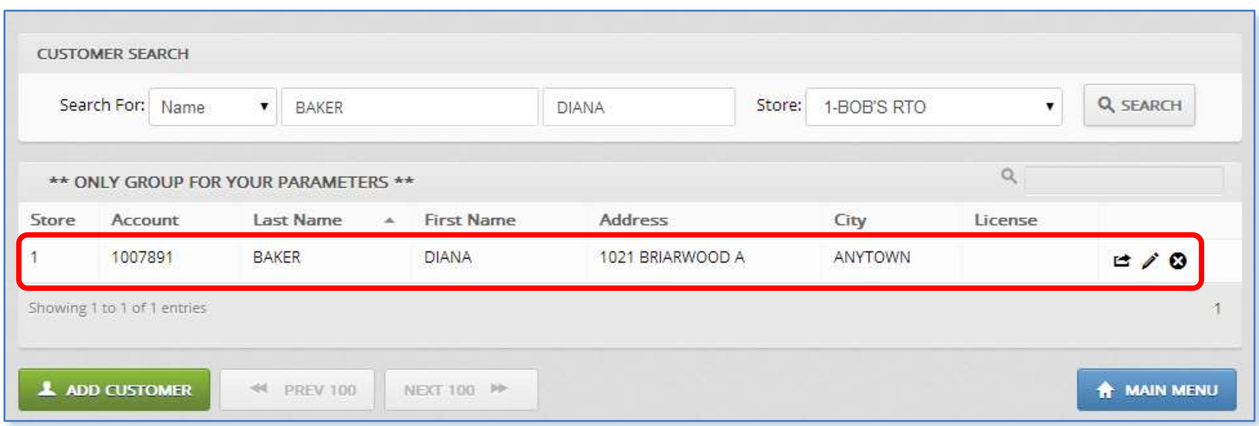
- Alert employees when information is needed.
- Document customer arrangements.
- Log other special circumstances.

The Customer Notes can be accessed through the *Rental Payment* process or through the *Collections* screens. This example demonstrates Customer Notes in the *Rental Payment* screen.

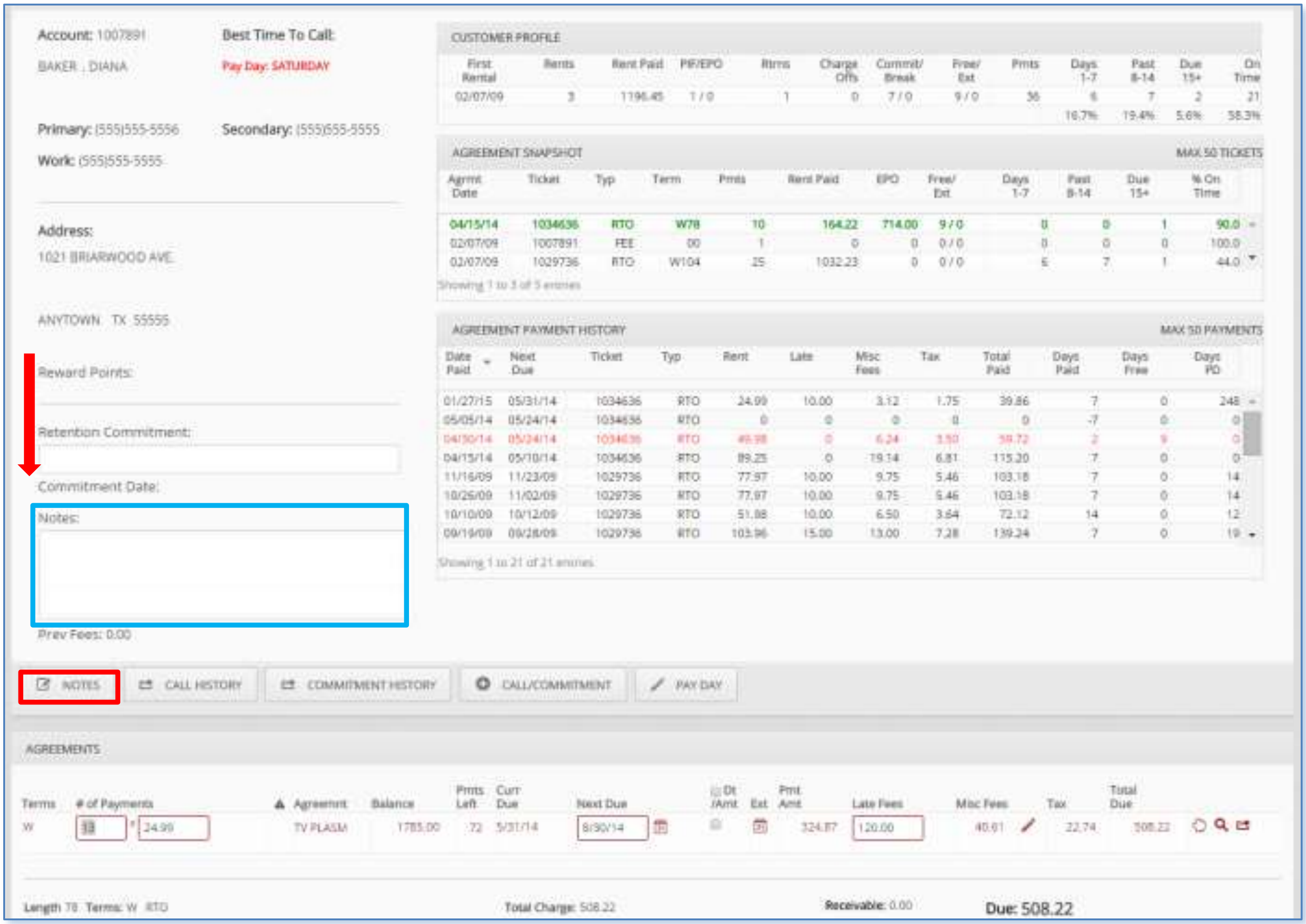
Begin by using the *Customer Search* and enter the customer's last and first name. Click **SEARCH** to continue.



Click anywhere on the customer information line to continue.

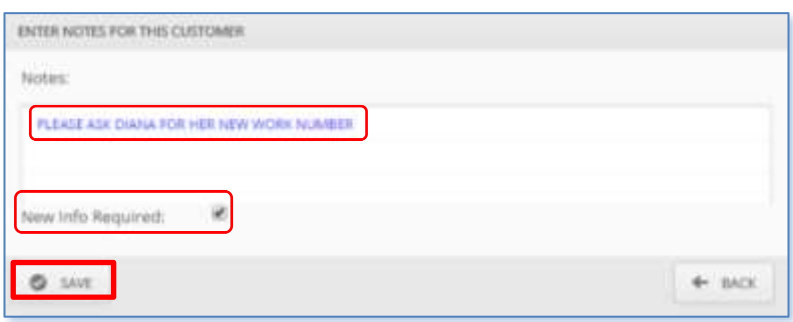


The Customer Notes Field is located in the *Rental Payment* Screen. To add a Customer Note, click on the **NOTES** button.



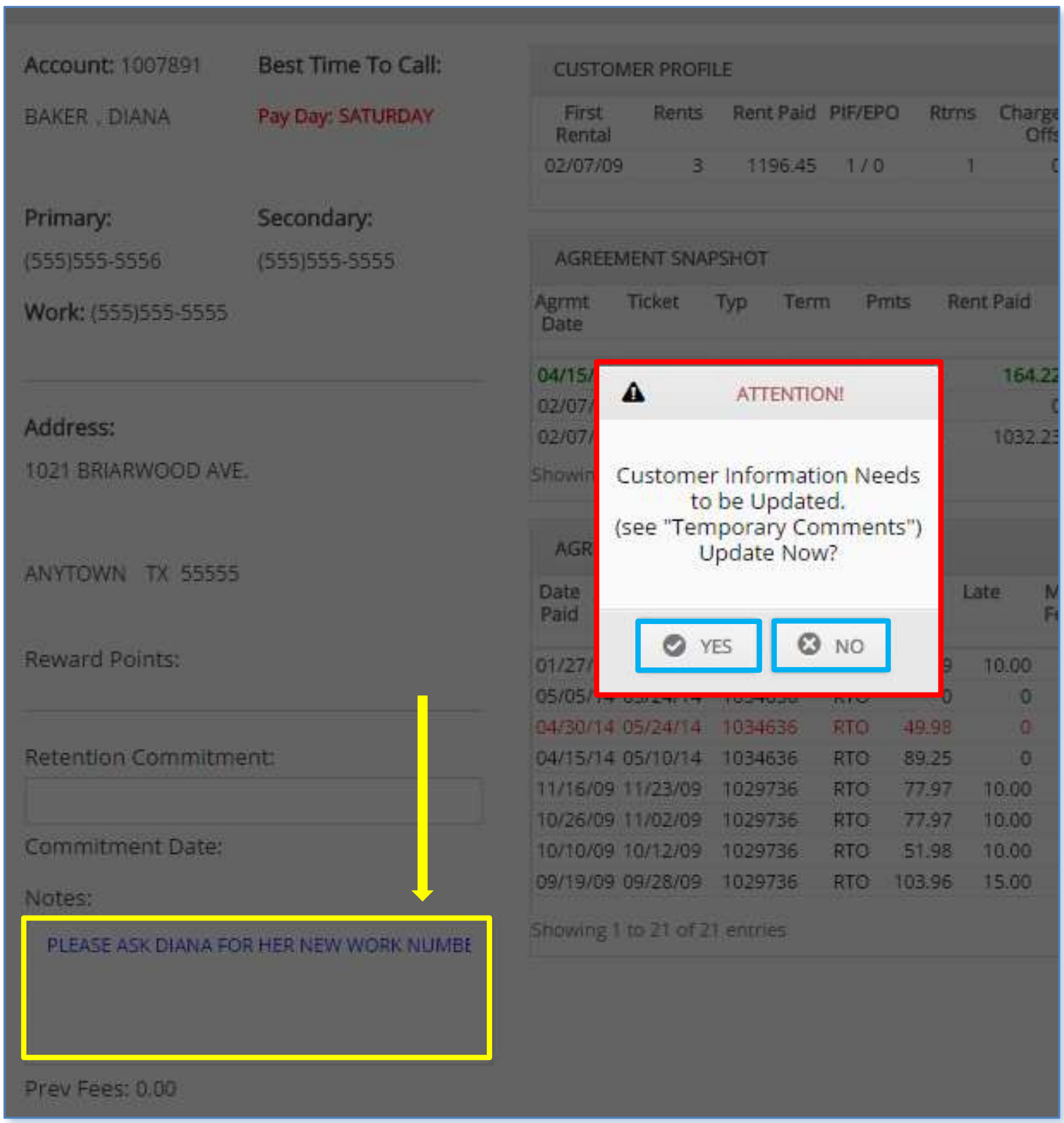
The Customer Notes screen will open, allowing input. There are three lines available with a total of 237 characters.

Once you have entered the note, you have the option to click the checkbox next to **New Info Required**. This will activate the Customer Notes to automatically Pop-Up when the customer is pulled up from the *Rental Payment* or the *Collections* screen. Click **SAVE** when done.



Below is an example of pulling the customer up in rental payment and getting the Customer Notes pop-up.

- An *Attention* box will pop-up to alert the employee that there may be a request to update customer information.
  - Selecting **YES** will open the customer record for editing.
  - Selecting **NO** will continue on into the rental payment process.
- The background screen will be grayed out, however, you will still be able to see the information in the Notes box in the lower left. Once **YES** is selected you will be in edit mode and will not be able to see the information until moving out of edit mode.
  - The box will continue to pop-up until you select **YES** and then remove the check from the checkbox next to **New Info Required**.



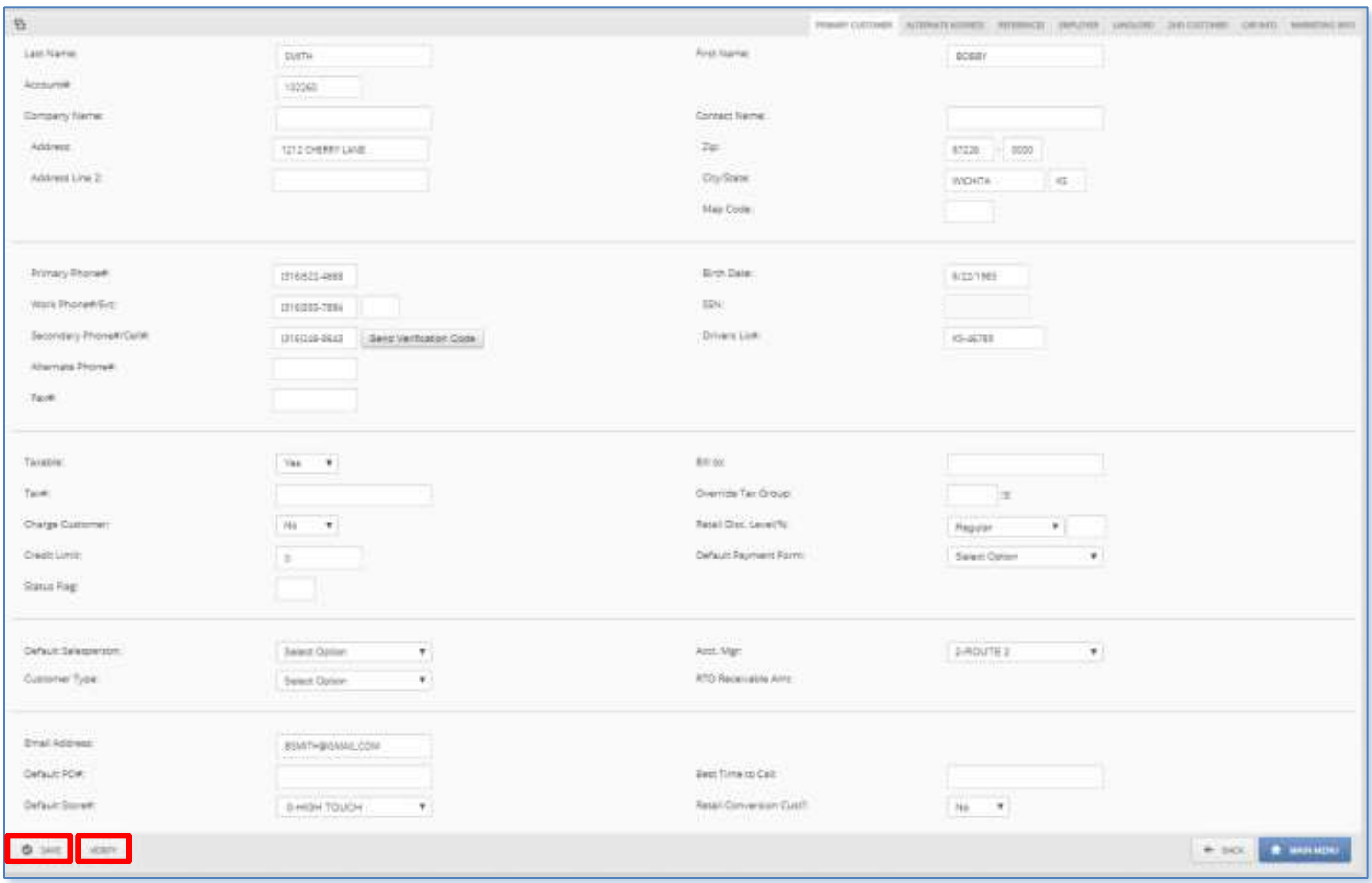
Customer Verification

The **Customer Verification** application is used within the Customer Maintenance (**RCUSTMNT)** application. It allows for easy management of verifying customer information and allows for a digital record of the verification completed. This application was developed to help eliminate the paper rental applications and provide a record within your cynergi|suite point-of-sale for that activity.

- **Web Orders:** Lists all web orders that are Pending, Completed, or Cancelled
- **RCUSTMNT:** Allows access to add or update customer information

The **CUSTOMER MAINTENANCE** screen displays the **SAVE** button and the new **VERIFY** button at the bottom of the screen.

The **VERIFY** button will be activated upon completing the information for a new customer and clicking the **SAVE** button. The **VERIFY** button will automatically be displayed for existing customers.



Click on the **VERIFY** button located next to the **SAVE** button at the bottom of the screen.

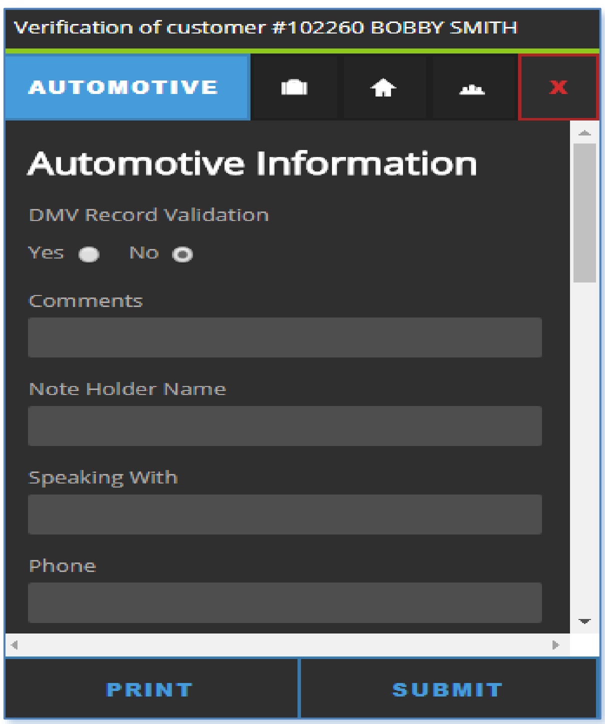
Verification of Customer

The verification screen displays four different tabs of information to be verified. You can click on any one of the tabs to begin verifying information.

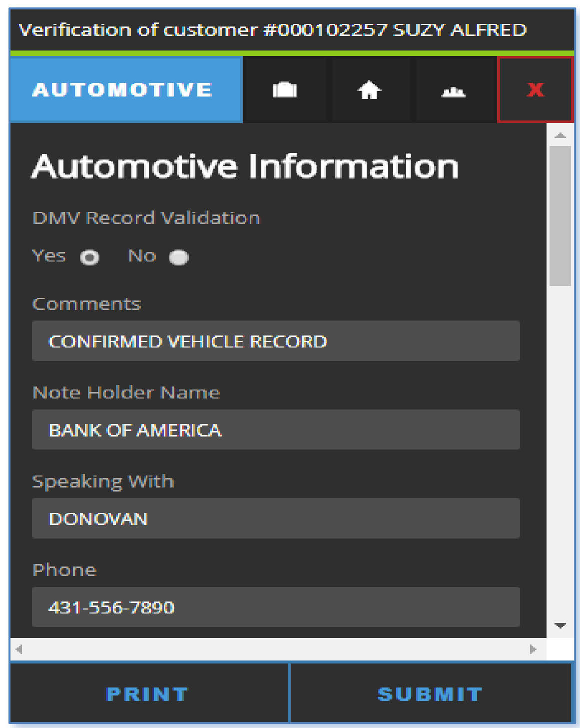
- **AUTOMOTIVE:** Allows verification of the customer's automotive information
- **EMPLOYMENT:** Allows verification of the customer's employment information
- **LANDLORD:** Allows verification of the customer's landlord information
- **REFERENCES:** Allows verification of the customer's reference information

The first time a customer's information is verified, the Verification application opens with blank fields. If a customer's information was previously verified, the application will open and display the fields with the saved information.

New Customer (fields are blank)

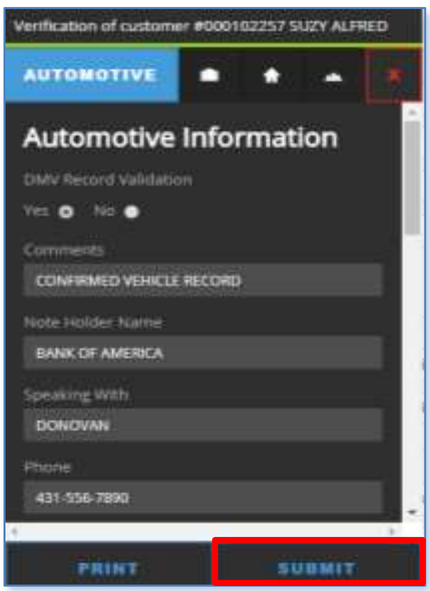


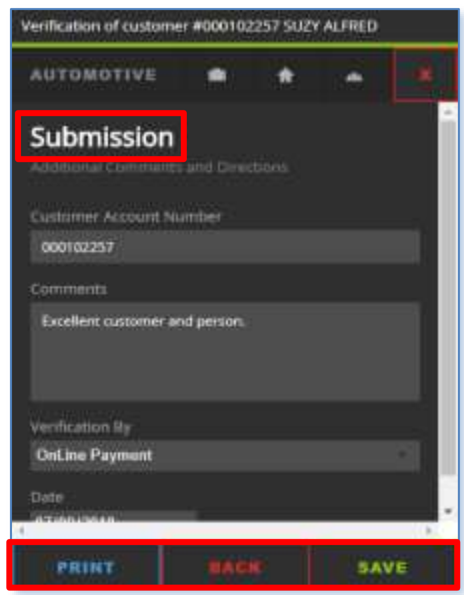
Existing Customer (fields are populated)

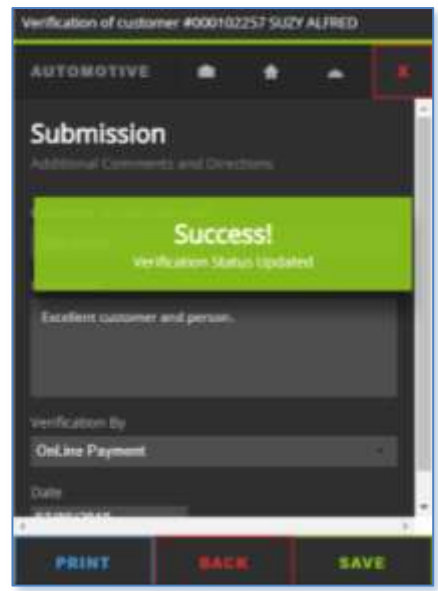


Submission of Verification

- **Red X:** Clicking the red **X** will close the verify application without saving any information.
- **SUBMIT:** Click the **SUBMIT** button to display the *Submission* screen and finalize the verification process.
- **SAVE:** Click **SAVE** to save the verified information that has been completed.
- **BACK:** Click **BACK** to back up and return to one of the verification tabs.
- **PRINT:** Click **PRINT** to print out the form that include the CUSTOMER MAINTENENCE information and the verification information. *(Printing should be completed as the last step after submitting the final verification information.)*
- **Verification Status:** When the verification information is submitted, a **Success!** message displays.







AUTOMOTIVE INFORMATION – will include any automotive related information that could be verified

- **DMV Record Validation:** Yes/No field to confirm if the DMV record was verified
- **Comments:** Used for further comments to be entered for the DMV verification
- **Note Holder Name:** Allows entry of the company name that holds the lien on the vehicle
- **Speaking With:** Allows entry of the person you are speaking with during the automotive verification
- **Phone:** Used to enter the phone number of the lienholder
- **How Related:** Enter title of the lienholder
- **Verified Same Address:** Yes/No field verifying the customer's address
- **If Different Address:** Used to enter a different address
- **Verified Same Phone:** Yes/No field verifying the customer's phone number
- **If Different Phone:** Allows entry of a different phone number
- **Verified Same Employer:** Yes/No field verifying the customer's employer
- **If Different Employer:** Used to enter the name of a different employer
- **Auto Purchase Date:** Enter the vehicle purchase date
- **Monthly Automotive Payment:** Enter the monthly vehicle payment
- **Frequency of Payment:** Selection list of payment frequencies (Per Week, Bi-weekly, Per Month, Monthly, or Annually)
- **Last Payment Made:** Used to enter the last payment made

- **Next Payment Due Date:** Enter the next payment due date
- **Previous Loan:** Yes/No field designating if the customer has had a previous loan with the lienholder
- **Any Action Pending (Repo, etc.):** Used to enter any other pending actions against the customer

EMPLOYMENT INFORMATION – will include employment information that could be verified

- **With whom are we speaking?:** Enter the employer's name
- **Position/Title:** Enter the employer's position or title
- **Date of Hire:** Enter the hire date of the customer's employment
- **May we leave a message at work?:** Yes/No field designating if you can leave messages
- **What Department/Shift:** Enter a Department name and/or the Shift number the customer works
- **Is Mr./Ms. First name Last Name Reliable?:** Yes/No field to verify the customer is reliable

LANDLORD INFORMATION – will include home/rental information that could be verified

- **With whom are we speaking?:** Used to enter the landlord's name
- **Verify Address:** Checkbox showing the customer's address was verified
- **How long at current address:** Allows alpha text to be entered describing the length of residency
- **Verify Phone?:** Checkbox used to show the customer's phone number was verified
- **Alternate Phone:** Used to enter an alternate phone number for the customer
- **Type of Lease:** Selection list of lease types (Yearly, Semi-Annually, or Monthly)
- **How is rent paid?:** Selection list of payment frequencies (Monthly, Bi-Monthly, or Weekly)
- **Rent Amount:** Allows for the rent amount to be entered or to use the arrow keys
- **Is Mr./Ms. First name Last Name Reliable?:** Yes/No field verifying if the customer is reliable
- **May we leave messages?:** Yes/No field designating if you can leave messages

REFERENCES INFORMATION – will include up to six references of information that could be verified

- **Verify Relationship:** Checkbox used to show the customer and reference has been verified
- **Verify address/employment:** Checkbox to show the employment and/or address has been verified
- **Has Home Telephone:** Checkbox verifying the customer has a home phone
- **Verify Telephone Number:** Checkbox to show the customer's phone number has been verified
- **Is Mr./Ms. First name Last Name Reliable?:** Yes/No field verifying if the customer is reliable
- **How long have they known the customer? (Months):** Enter the number of months the reference has known the person being verified
- **Reference Rating, GFP:** Selection list used to rate the customer after the verification process has been completed (G = Good, F = Fair, and P = Poor)

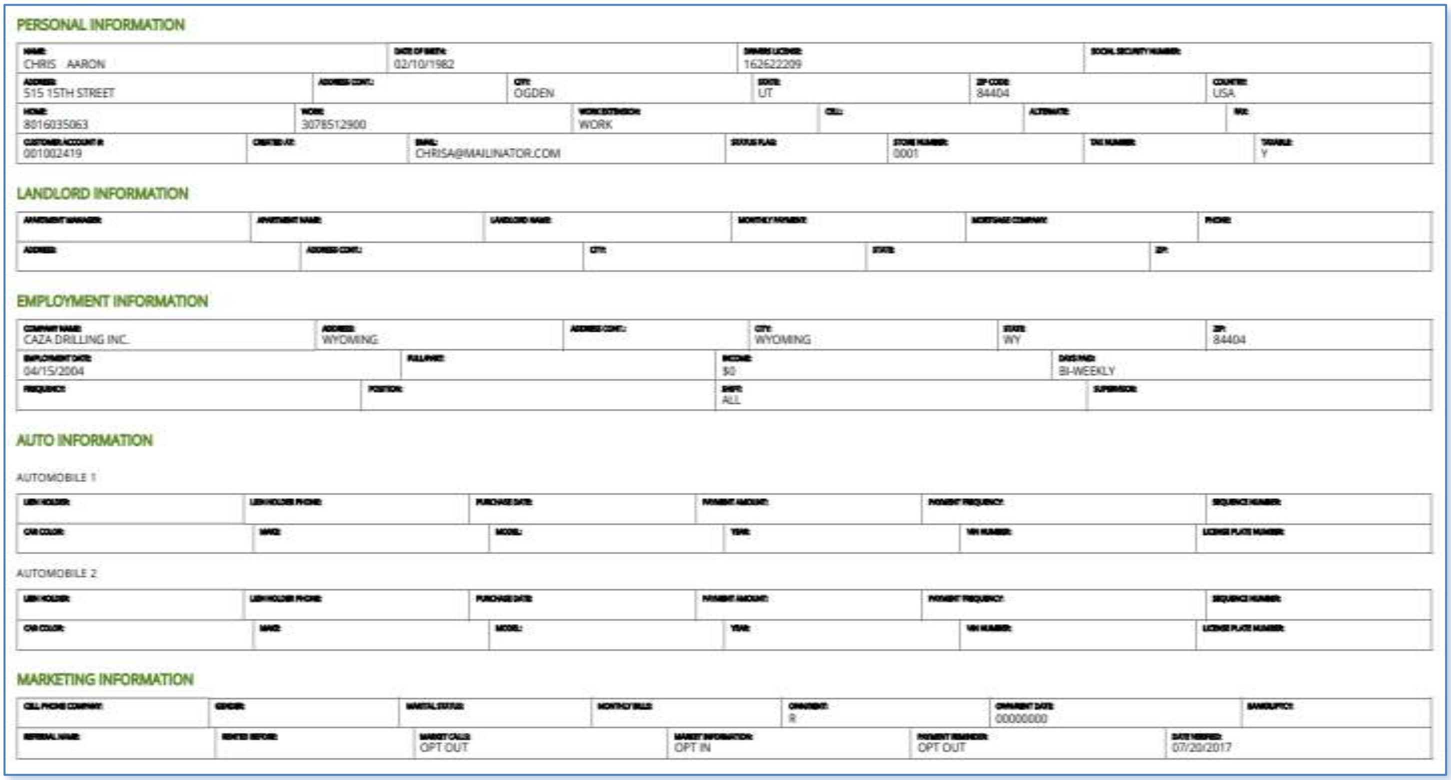
SUBMISSION SCREEN – the final screen to be completed before saving and printing the verification information

- **Customer Account Number:** Account number given to the customer when they were added into the cynergi|suite system
- **Comments:** Allows for any additional comments to be entered by the verifier
- **Verification By:** Selection list used to select the verifier's name
- **Date:** Final verification date (defaults to the current date)

Printed Form

When **PRINT** is selected from the verification screen, the form below is generated and displayed on two pages.

The **VERIFY** information that was completed will print on the last page in a different format.



PERSONAL INFORMATION

NAME: CHRIS AARON	DATE OF BIRTH: 02/10/1982	DRIVERS LICENSE: 162622209	SOCIAL SECURITY NUMBER:

ADDRESS: 515 15TH STREET	ADDRESS CONT.:	CITY: OGDEN	STATE: UT	ZIP CODE: 84404	COUNTRY: USA

HOME: 8016035063	WORK: 3078512900	WORK EXTENSION: WORK	CELL:	ALTERNATE:	FAX:

CUSTOMER ACCOUNT #: 001002419	CREATED AT:	EMAIL: CHRISA@MAILINATOR.COM	STATUS FLAG:	STORE NUMBER: 0001	TAX NUMBER:	TAXABLE: Y

LANDLORD INFORMATION

APARTMENT MANAGER:	APARTMENT NAME:	LANDLORD NAME:	MONTHLY PAYMENT:	MORTGAGE COMPANY:	PHONE:

ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:

EMPLOYMENT INFORMATION

COMPANY NAME: CAZA DRILLING INC.	ADDRESS: WYOMING	ADDRESS CONT.:	CITY: WYOMING	STATE: WY	ZIP: 84404

EMPLOYMENT DATE: 04/15/2004	FULL/PART:	INCOME: $0	DAYS PAID: BI-WEEKLY

FREQUENCY:	POSITION:	SHIFT: ALL	SUPERVISOR:

AUTO INFORMATION

AUTOMOBILE 1

LIEN HOLDER:	LIEN HOLDER PHONE:	PURCHASE DATE:	PAYMENT AMOUNT:	PAYMENT FREQUENCY:	SEQUENCE NUMBER:
CAR COLOR:	MAKE:	MODEL:	YEAR:	VIN NUMBER:	LICENSE PLATE NUMBER:

AUTOMOBILE 2

LIEN HOLDER:	LIEN HOLDER PHONE:	PURCHASE DATE:	PAYMENT AMOUNT:	PAYMENT FREQUENCY:	SEQUENCE NUMBER:
CAR COLOR:	MAKE:	MODEL:	YEAR:	VIN NUMBER:	LICENSE PLATE NUMBER:

MARKETING INFORMATION

CELL PHONE COMPANY:	GENDER:	MARITAL STATUS:	MONTHLY BILLS:	GARNISHMENT: R	GARNISHMENT DATE: 00000000	BANKRUPTCY:

REFERRAL NAME:	RENTED BEFORE:	MARKET CALLS: OPT OUT	MARKET INFORMATION: OPT IN	PAYMENT REMINDER: OPT OUT	DATE VERIFIED: 07/20/2017

CO-SIGN INFORMATION

NAME:	DATE OF BIRTH:	DRIVERS LICENSE:	SOCIAL SECURITY NUMBER:	
ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:
MAILING ADDRESS:	MAILING ADDRESS CONT.:	CITY:	STATE:	ZIP:
PHONE:	WORK PHONE:	EXT:	RELATIONSHIP:	

CO-SIGN EMPLOYMENT INFORMATION

COMPANY NAME:	ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:
EMPLOYMENT DATE:	FULL/PART TIME:	INCOME:	PAY DAYS:	POSITION:	
SHIFT:	SUPERVISOR:	PAY FREQUENCY:	COMMENTS:	MAP CODE:	

REFERENCES

REFERENCE NAME: DAVE AARON	EMAIL:	PHONE: 8013884347	RELATIONSHIP:	MARKET OPT OUT:
ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:
REFERENCE NAME: DANNA AARON	EMAIL:	PHONE: 8017311199	RELATIONSHIP:	MARKET OPT OUT:
ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:
REFERENCE NAME: DOUG	EMAIL:	PHONE: 4355031675	RELATIONSHIP:	MARKET OPT OUT:
ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:
REFERENCE NAME:	EMAIL:	PHONE: 8016035063	RELATIONSHIP:	MARKET OPT OUT:
ADDRESS: HOME	ADDRESS CONT.:	CITY:	STATE:	ZIP:
REFERENCE NAME:	EMAIL:	PHONE:	RELATIONSHIP:	MARKET OPT OUT:
ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:
REFERENCE NAME:	EMAIL:	PHONE:	RELATIONSHIP:	MARKET OPT OUT:
ADDRESS:	ADDRESS CONT.:	CITY:	STATE:	ZIP:

SIGNATURES

NAME: CHRIS AARON

OFFICE VERIFICATION FOR CHRIS AARON

REFERENCES

	1	2	3	4	5	6
VERIFY RELATIONSHIP:	YES	NO	NO	NO	NO	NO
VERIFY ADDRESS/EMPLOYMENT:	YES	NO	NO	NO	NO	NO
HAS HOME PHONE:	YES	NO	NO	NO	NO	NO
VERIFY TELEPHONE NUMBER:	YES	NO	NO	NO	NO	NO
IS MR./MS. CHRIS AARON RELIABLE?	YES	NO	NO	NO	NO	NO
MAY WE LEAVE A MESSAGE?	YES	NO	NO	NO	NO	NO
HOW LONG HAVE YOU KNOWN THE CUSTOMER?	102 MONTHS	0 MONTHS	0 MONTHS	0 MONTHS	0 MONTHS	0 MONTHS
HOW OFTEN DO YOU SEE THE CUSTOMER?	MONTHLY					
REFERENCE RATING GFP:	G					

LANDLORD

WITH WHOM ARE WE SPEAKING?	MARK MARTIN
VERIFY ADDRESS:	YES
HOW LONG AT CURRENT ADDRESS:	5
VERIFY PHONE:	YES
ALTERNATE PHONE:	6234445511
TYPE OF LEASE:	SEMI-ANNUALLY
HOW IS RENT PAID?	MONTHLY
RENT AMOUNT:	$0
RELIABLE:	YES
MAY WE LEAVE MESSAGES?	YES

EMPLOYMENT

WITH WHOM ARE WE SPEAKING?	SALLY SMITH
POSITION/TITLE:	MANAGER HR
DATE OF HIRE:	01/01/2016
MAY WE LEAVE A MESSAGE AT WORK?	YES
WHAT DEPT/SHIFT:	DAY SHIFT
RELIABLE:	YES

AUTO

DMV RECORD VERIFICATION:	YES
COMMENTS:	NO ISSUES
NOTE HOLDER NAME:	SUNCREST BANK
SPEAKING WITH:	JOSEPH
PHONE:	6203334455
HOW RELATED:	BANKING
VERIFIED SAME ADDRESS:	YES
IF DIFFERENT ADDRESS:	N/A
VERIFIED SAME PHONE:	YES
IF DIFFERENT PHONE:	N/A
VERIFIED SAME EMPLOYER:	YES
IF DIFFERENT EMPLOYER:	N/A
PURCHASE DATE:	02/07/2019
PAYMENT AMOUNT:	$500
FREQUENCY OF PAYMENT:	MONTHLY
LAST PAYMENT:	07/15/2018
NEXT PAYMENT DUE:	08/15/2018
PREVIOUS LOAN:	NO
ANY ACTION PENDING (REPO, ETC):	NONE

COMMENTS
GOOD RISK

VERIFIED BY: CHRISTOPHER C HALE #1004 VERIFIED DATE: 2018-07-31