

# Tapco Europe CRM (Customer Relations Management System) Instructions

## English Version - Page 1 of 3

### 1) Account Balance

**Account Balance**

Terms  
Sales Rep

[View Paid Invoices](#) | [Print Statement](#) | [Aged Summary](#)

Invoice Number	Ship To	Type	Invoice Date	Tapco Order Number	Due Date	Our Reference	Your Reference	Invoice Amount	Balance Due	Late Days
18264-001		SALE	14/11/2005	18264	13/01/2006	18264_001	xxxx/xxxxx	25.07	25.07	245
18279-001		SALE	17/11/2005	18279	16/01/2006	18279_001	xxxx/xxxxx	68.19	68.19	242
18501-001		SALE	16/01/2006	18501	17/03/2006	18501_001	xxxx/xxxxx	17.70	17.70	182
18518-001		SALE	18/01/2006	18518	19/03/2006	18518_001	xxxx/xxxxx	26.33	26.33	180
Totals(4)								137.29	137.29	

Click the blue highlighted text for further information

### 2) Order Status

**Order Status**

Customer . . .

Service Rep  
Payment Terms  
Sales Rep  
Primary Contact

Customer PO Number  [Search](#) [View Shipped Orders](#)

Tapco Order Nbr	Store	City	State	Order Date	Promised	Customer PO	Order Value	Status	Ship Date
18561				27/01/2006	24/02/2006	xxx/xxx	1,046.52	Open	
Totals(1)							1,046.52		

Click the blue highlighted text for further information

## Tapco Europe CRM (Customer Relations Management System) Instructions English Version - Page 2 of 3

### 3) Manage My Users

The screenshot shows the 'Manage My Users' interface. At the top, there is a navigation bar with 'My Reports', 'Home', 'Contact Us', and 'Logout'. A left-hand menu contains 'Account Balance', 'Order Status', 'Manage My Users' (highlighted), and 'My Profile'. The main content area is titled 'Manage My Users' and includes a link 'Add a New User' with the instruction 'Click here to add users to your account'. Below this is a table with the following data:

Customer	User ID	User Name	Type	Email	Last Accessed	Status
0042	00420001	Alison Beahan	CUSTOMER		23/08/2006	A

### 4) Add a New User

The screenshot shows the 'Add a New User' form. The form is titled 'Add a New User' and includes the following fields and instructions:

- Guest ID**: A text box at the top right. Instruction: 'New Guest ID will display here once the below form is complete'.
- Name**: A text box. Instruction: 'Input new users name here'.
- Type**: A dropdown menu with options 'CUSTOMER' and 'SHIPTO'. Instruction: 'Click drop-down arrow, choose either CUSTOMER or SHIPTO (CUSTOMER can view account balance and order status) (SHIPTO can view order status only)'.
- Password**: A text box. Instruction: 'Input new users password here'.
- Email**: A text box. Instruction: 'Input new users email address here (optional)'.
- Status**: Radio buttons for 'Active' (selected) and 'Inactive'.
- Buttons**: 'SUBMIT' and 'CANCEL' buttons. Instruction: 'Submit or Cancel entry - Hit Submit to generate new Guest ID'.

Tapco Europe CRM (Customer Relations Management System) Instructions  
English Version - Page 3 of 3

5) My Profile

The screenshot shows a web browser window displaying the Tapco Europe CRM interface. The browser's address bar is empty, and the page title is "Tapco Europe Limited". The page layout includes a top navigation bar with "My Reports", "Home", "Contact Us", and "Logout" links. A left-hand menu lists "Account Balance", "Order Status", "Manage My Users", and "My Profile" (highlighted in red). The main content area is titled "My Profile" and contains a "Password Change" form. The form includes a "My Login ID" field, "Name" and "Email ID" fields, and a "Password Change" section with "Old Password", "New Password", and "Confirm Password" fields. "SUBMIT" and "CANCEL" buttons are located at the bottom of the form. To the right of the form, a text instruction states: "Use this screen to change your current password".