

Appendix E

Searching for a Customer Using the Customer Search Screen

As you are completing the information on the Field Trip Inquiry screen (Figure E-1), you may wish to enter a billing customer for your trip in the Billing Customer field. You can enter the billing customer number in the Billing Customer field or click the drop-down arrow and choose the number. However, if you don't know the billing customer number, you can click the Billing Customer button and search for the customer name using the Customer Search screen (Figure E-2).

The screenshot shows a software window titled "Field Trips" with a sub-header "Field Trip Inquiry". On the right, it says "Number of trips selected: 98". Below this are tabs for "Dates and General", "Billing", "Assignment", "Other", and "Sorting and Lookup". The "Billing" tab is active. It contains fields for "Fund:", "Selected P.O.#:", and "Selected Billing Rate:". To the right of these fields is a "Billing Customer" button with a drop-down arrow. An arrow points from this button to a text box below the screenshot. Below the form is a table with columns: Trip#, Customer, Destination, Departure, Billed, Canceled, and Assign. The table lists 10 trips. At the bottom are buttons for "Find All", "View", "Calendar", and "Exit".

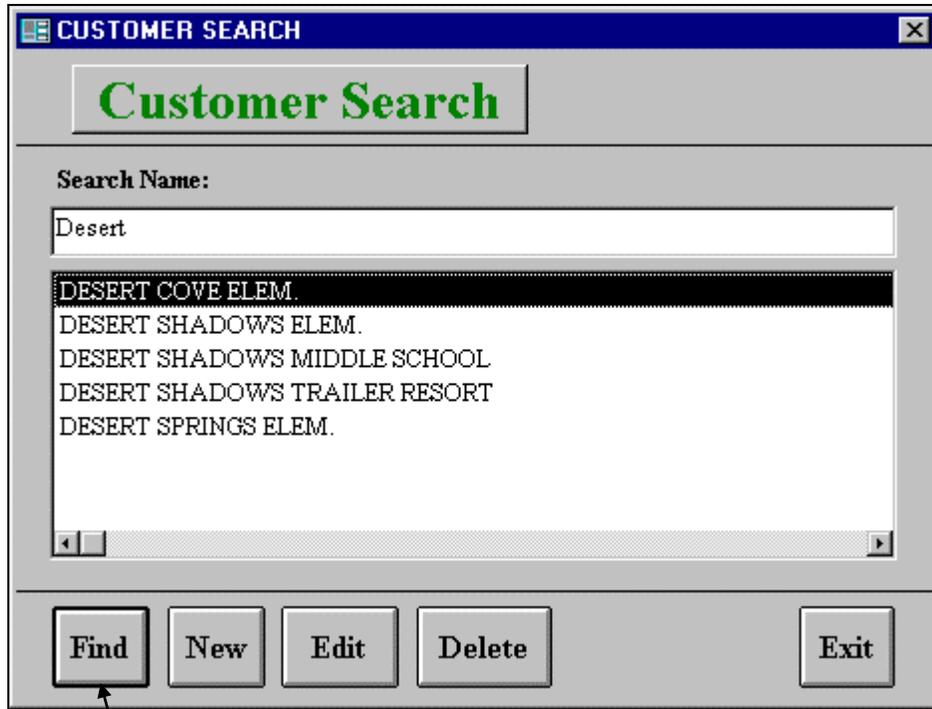
Trip#	Customer	Destination	Departure	Billed	Canceled	Assign
6899	EAGLE RIDGE ELEM.	PHOENIX ART MUSEUM	12/10/98	Yes	No	Yes
6107	EAGLE RIDGE ELEM.	WILDLIFE WORLD ZOO	4/22/98	Yes	No	Yes
6108	EAGLE RIDGE ELEM.	WILDLIFE WORLD ZOO	4/23/98	Yes	No	Yes
6136	EAGLE RIDGE ELEM.	PARADISE VALLEY PARK	4/23/98	Yes	No	Yes
6138	EAGLE RIDGE ELEM.	PHX LITTLE THEATER COOKIE CO	4/2/98	Yes	No	Yes
6195	EAGLE RIDGE ELEM.	HERBERGER THEATER	4/17/98	Yes	No	Yes
6216	EAGLE RIDGE ELEM.	DEER VALLEY POOL	5/13/98	Yes	No	Yes
6217	EAGLE RIDGE ELEM.	DEER VALLEY POOL	5/12/98	Yes	No	Yes
6225	EAGLE RIDGE ELEM.	PARADISE VALLEY PARK	5/8/98	Yes	No	Yes

Click the Billing Customer button if you need to look up the customer name.

Figure E-1. The Billing Customer Button on the Field Trip Inquiry Screen

You can quickly search for a billing customer by its customer name using T.O.M.'s search feature (Figure E-2). If you have a lot of customers, searching can be faster than scrolling.

1. Enter all or part of the customer name. If you enter part of the customer name, it must be the beginning, such as "ARIZONA" or "ARIZ" as part of all customer names that begin with "ARIZONA."
2. Click the Find button. If a match is found, the customer name(s) will be displayed in the Customer Name list.



Enter the all or part of the customer name and then click the Find button to start the search.

Figure E-2. The Customer Search Screen

NOTE: To select all customer names again, delete the search information and click the Find button.



T.O.M Tip

As a school user, you have permission to use only the Find and Exit buttons. You do not have permission to use the New, Edit and Delete buttons.