Customer Lookup Training Guide: RSSS System

🎙 Demonstrator: Unnamed Trainer

00:00 – Introduction

- Overview of customer lookup in the RSSS system.

- Required for any transaction involving a customer (rent, sell, payments, etc.).

00:15 – Presence in the System

- If the customer exists: proceed with transactions.

- If not: create a new customer record.

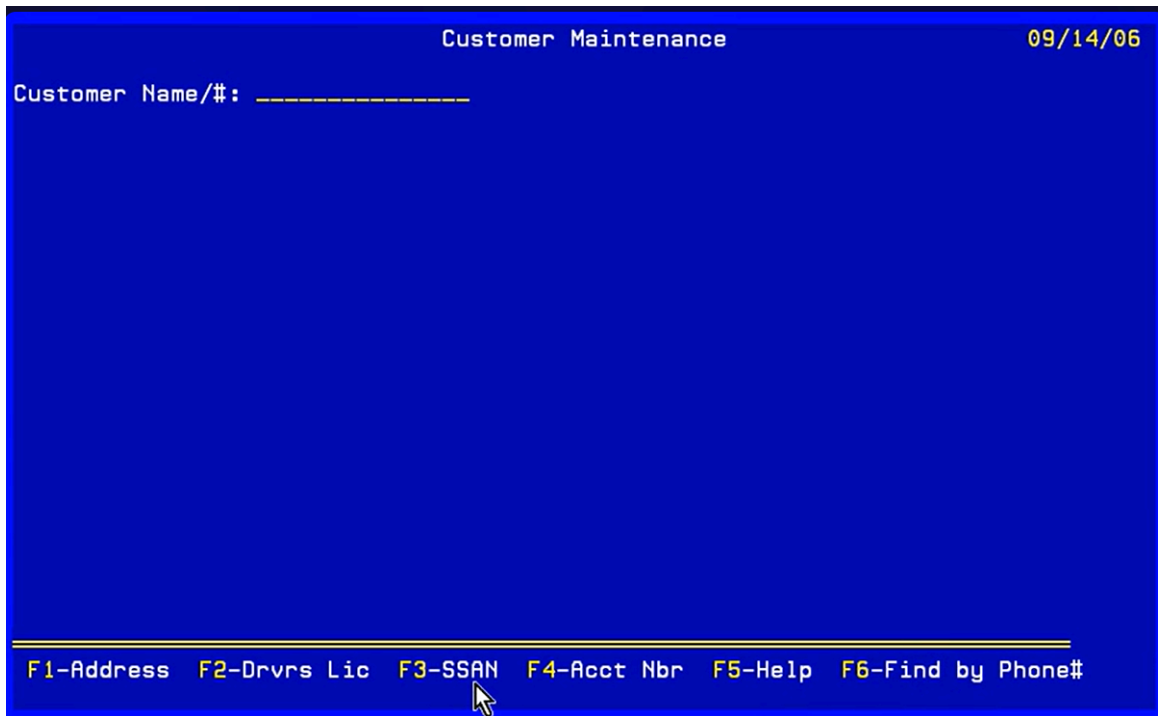- Multiple methods exist to locate a customer in the system.

00:31 – Accessing the Customer Listing

- From the Daily Menu, select Option 2 – New Rental Agreement → Enter.

- Press Enter through the printer and file path prompts.

- You arrive at the Customer Maintenance / Listing Screen.

00:45 – Customer Lookup Options

• Last Name (Last, First)

• Account Number (F4)

• Address

• Driver's License Number

• Home Phone Number

• Social Security Number

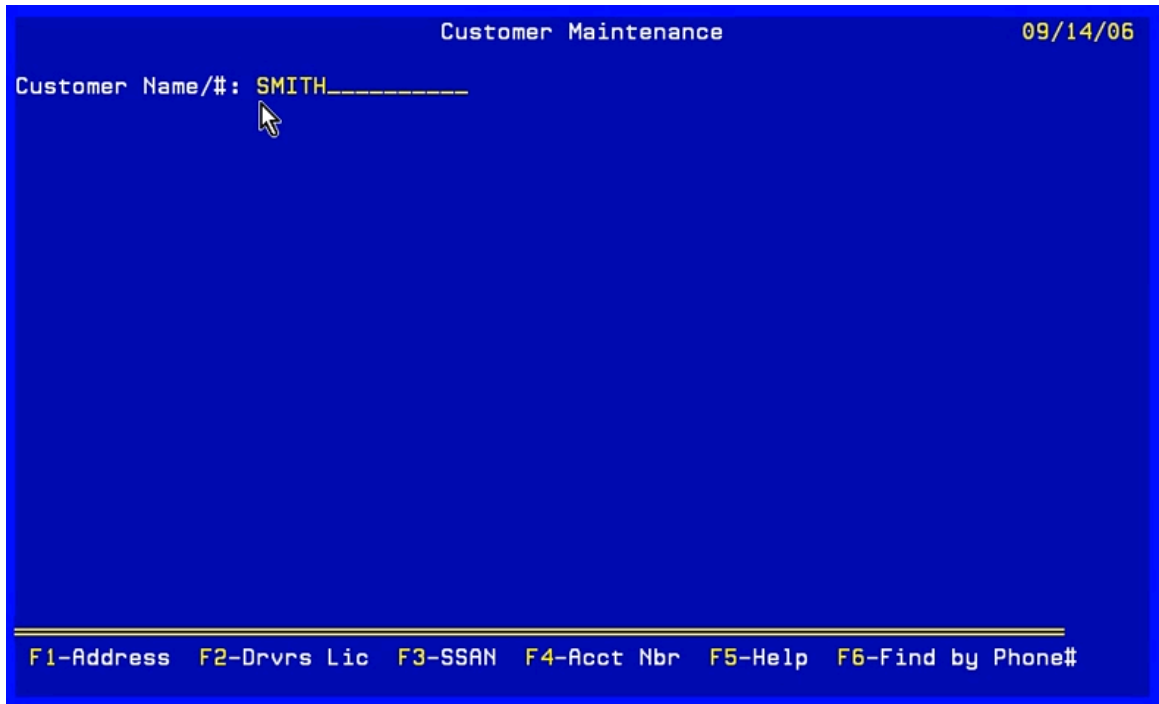• Partial entries are supported.

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                    Customer Maintenance                 09/14/06

Customer Name/#:  _____




                                                                        


 F1-Address  F2-Drvrs Lic  F3-SSAN  F4-Acct Nbr  F5-Help  F6-Find by Phone#
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01:11 – Lookup Function Keys

• Each lookup type uses a specific function key (F1 to F6).

• You can input full or partial data.

• Works across different customer-related tasks.

01:37 – Lookup by Last Name Only

• Example: Search for "Smith" → Enter.

• Press Enter through the first name prompt.

• System starts the list with last name beginning entries.

02:00 – Interpreting Lookup Results

• Use F1 to scroll through.

• Records with an asterisk (*) = customer has active agreements.

• Example: John Smith on Avatar Lane (no agreement) vs. the other John Smith (has agreement).

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Customer Name/#: SMITH

   Loc  Acct Nbr  Last Name    First Name   Address           DL# Or City      SSAN
*    1  10012221  SMITH        ABEL         3333 HOLLYWOOD D  3333333333       3333
        10012223  SMITH        ADRIAN       1111 HOLLYWOOD D  111111111        1111
        10003683  SMITH        ALFONZIA     3400 49TH LANE B  ANYTOWN          0001
        10000800  SMITH        ALFRANCES    230 6TH DR SW     ANYTOWN          0001
        10004573  SMITH        ALFRED       16887 NW 38TH AV  ANYTOWN          0001
*    1   1000801  SMITH        ALICE        7703 JAMES RD     ANYTOWN          1231
*    4  10012122  SMITH        ALLEN/KATH   2766 SE EVERGREE  ANYTOWN          1232
*    1  10000067  SMITH        AMANDA       1801 S. PARROT    ANYTOWN          0001
        10009490  SMITH        AMANDA       1814 SE MANTUA S  ANYTOWN          0001
         1002877  SMITH        ANDRE        205 N. 20TH ST.   ANYTOWN          0001
        10003255  SMITH        ANGELA       3147 NAYLOR TERR  ANYTOWN          0001
         5002829  SMITH        ANITA        1675 20TH CT SW   ANYTOWN          0001
         1000681  SMITH        ANNETTE      133 S 13 ST       ANYTOWN          0001
        10004703  SMITH        ANTHONY      916 NW 10TH STRE  ANYTOWN          0001
         4000028  SMITH        APRIL        14943 SW 171ST D  ANYTOWN          0001



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02:42 – Selecting the Correct Customer

• Highlight the correct record (active agreement).

• Press Enter to proceed to add a new agreement.

03:07 – Lookup by First Name

• Now try with: Last = Smith, First = J → Enter.

• Scroll with F1 to find "John Smith".

• Highlight and proceed.

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Customer Name/#: SMITH_____   J    _____




















                                                                      
 F1-Address   F2-Drvrs Lic  F3-SSAN  F4-Acct Nbr  F5-Help  F6-Find by Phone#
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Customer Name/#: SMITH            J

  Loc  Acct Nbr Last Name   First Name  Address         DL# Or City     SSAN
*   1  10011214 SMITH       JACK        395 12TH RD. AP1 ANYTOWN        0001
       2000562 SMITH        JACKIE      904 S.E. 5th ST. ANYTOWN        0001
       10007802 SMITH       JAKE        5241 HWY 441 SE  ANYTOWN        0001
       3004169 SMITH        JAMES       125 SW FAIRWAY A ANYTOWN        0001
       4000267 SMITH        JAMES       15183 SW YALAHA  ANYTOWN        0001
       10004039 SMITH       JAMES       2995 SE ASTER LN ANYTOWN        0001
       10004727 SMITH       JAMES       27200 BOX 10 N.E ANYTOWN        0001
       2002157 SMITH        JAMIE       RT 6 BOX 725     ANYTOWN        0001
*   1  10005781 SMITH       JANE        1234 XYZ LANE    ANYTOWN        0001
       2001615 SMITH        JANE        873 NE 14TH AVE  ANYTOWN        0001
       10003266 SMITH       JANE        354 8TH AVE      ANYTOWN        0001
       2002866 SMITH        JASON       3337 SE 34TH AVE ANYTOWN        0001
       10001744 SMITH       JASON       3549 SW 18TH ST  ANYTOWN        0001
       10004084 SMITH       JEFF        5350 HWY 441 APT ANYTOWN        0001
*   5  5003512 SMITH        JEFF        1635 29TH AVE    ANYTOWN        0001


                                                                      
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03:43 – Full Name Lookup

• Enter "John Smith" fully → Enter.

• The correct record is displayed first and already highlighted.

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                         Customer Maintenance              09/14/06
Customer Name/#: _____








  F1-Address  F2-Drvrs Lic  F3-SSAN  F4-Acct Nbr  F5-Help  F6-Find by Phone#
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04:07 – Lookup Using Partial Name

• Example: Enter "SM" → Enter.

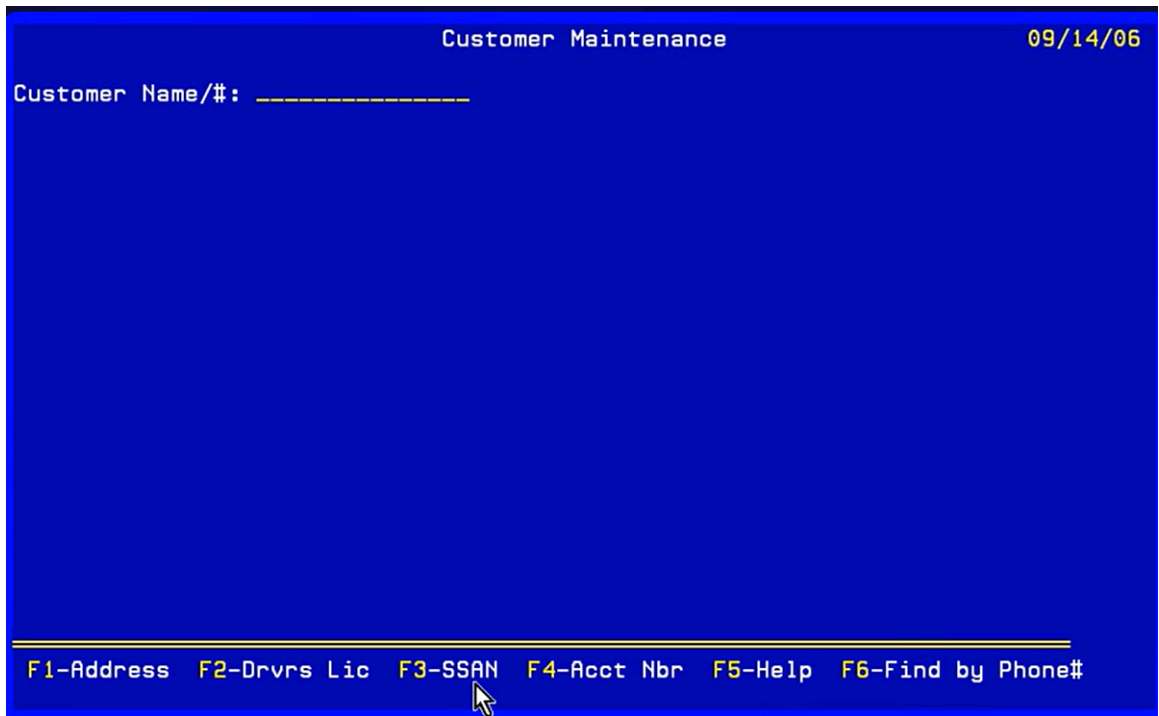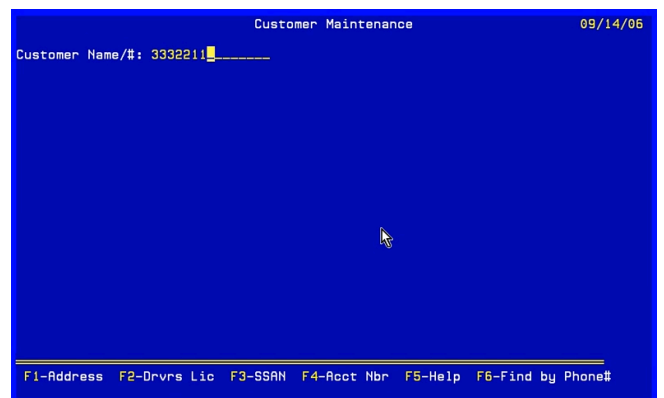• Partial names generate a customer list beginning from those characters.

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                         Customer Maintenance              09/14/06
Customer Name/#: _____








  F1-Address  F2-Drvrs Lic  F3-SSAN  F4-Acct Nbr  F5-Help  F6-Find by Phone#
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04:25 – Lookup by Address

• Enter address: "3215" → press F1.

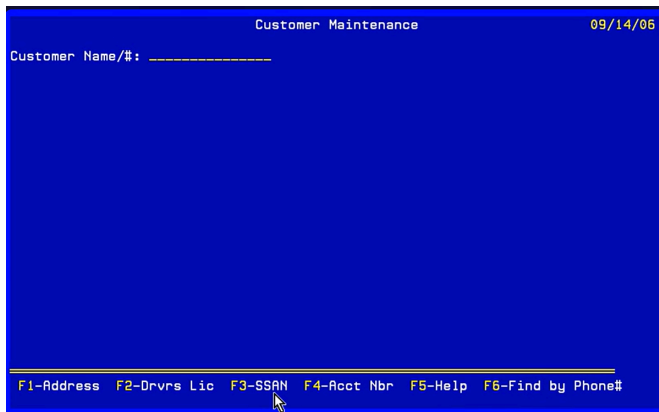• Useful if unsure of full address or abbreviations like "SW".

05:14 – Lookup by Driver's License

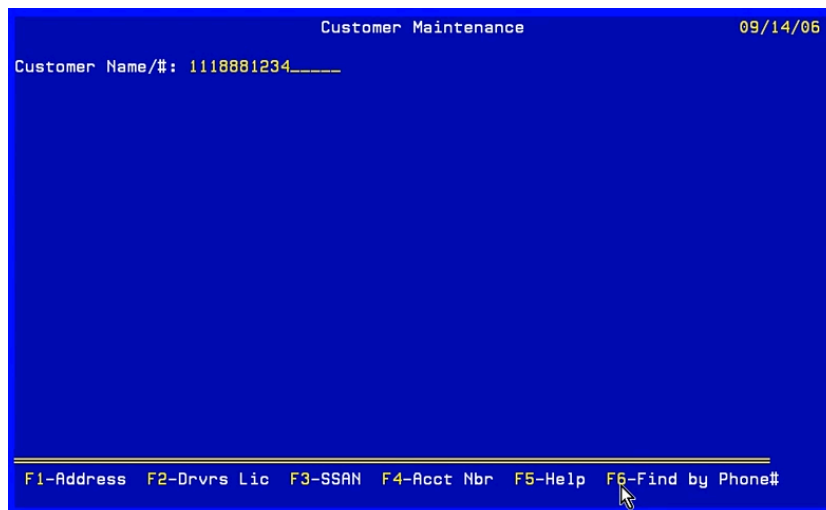• Enter "3332211" → press F2.

• Record appears directly in the list.

05:33 – Lookup by Social Security Number

• If only given partial SSN (e.g. "654"), mask the rest with digits like 121234.

• Press F3 to search.

• You must start with real digits; cannot use zeros first and then the last 4 digits.

06:56 – Lookup by Home Phone Number

• Enter full number (e.g., "1118881234") without dashes → press F6.

• Task-dependent: May skip listing and go straight into the new agreement or payment.

07:39 – Task Behavior May Vary

• Example: "Take Payment" task may prompt customer listing first before proceeding.

• Behavior depends on the task type and customer record setup.

08:18 – Lookup Fallbacks

• If phone number lookup yields multiple customers, use alternate lookup methods for precision.

08:44 – Take a Payment & View History

• Enter customer screen → Highlight John Smith → Press F3.

• View: Ticket number, sequence, status (open/closed), late payments, agreement date, next due, closed reason/date.

09:37 – Other Functions Mentioned

• F4 = Change Customer

• F6 = Add Customer

• Refer to the corresponding training videos on changing and adding customer records.


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 Customer Name/#: SMITH              JOHN

   Loc  Acct Nbr Last Name    First Name  Address            DL# Or City       SSAN
 *   1 ▌4002805 SMITH         JOHN        3215 SW REGATTA    3332211           0784
        10006743 SMITH        JOHN        1234 AVATAR LANE  ANYTOWN           0002
 *   1  10000512 SMITH        JOSEPH      2904 HARSON WAY   ANYTOWN           0001
        10007592 SMITH        JOSEPH      7986 S.E. 97TH W  ANYTOWN           0001
         5003291 SMITH        JUDITH      3109 10TH ST SW   ANYTOWN           0001
         1002466 SMITH        JUDY        407 S 14 STREET   ANYTOWN           0001
        10003551 SMITH        JUDY        605 EAST WEATHER  ANYTOWN           0001
         2000357 SMITH        JULIA       606 NE 16TH AVE   ANYTOWN           0001
        10009628 SMITH        KANTREL     889 NE 15TH AVE   ANYTOWN           0001
        10009892 SMITH        KAREN       1071 NW 110TH ST  ANYTOWN           0001
         2000275 SMITH        KATHERINE   1071 NW 110TH ST  ANYTOWN           0001
        10000678 SMITH        KATIE       2928 HARSON WAY   ANYTOWN           0001
        10005276 SMITH        KENNY       745 NE EMERSON S  ANYTOWN           0001
        10001818 SMITH        KENYA       4730 40TH AVE. #  ANYTOWN           0001
         4002401 SMITH        KIANZA      5680 SE COLEE AV  ANYTOWN           0001


  F1-Next Page      F2-Prev Page      F3-AR/RTO Hist      F4-Chg      F6-Add
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09:55 – Wrap-Up

● F8 to Returns to Customer Maintenance main screen.

• Summary: Covered lookup and listing of customers.

10:08 – Conclusion

• Encouragement to explore additional training videos.

• Session ends with repeated thank-yous and well wishes.