

D. Separating Cash Customers

- a. Select Primus on Internet favorites
- b. Select Client, Client Search
- c. Type in Client #, select search (for each client listed on the Receipts Report)
- d. Select Open Book icon

e. If the client is a Member

- ❖ Select Trainee, Trainee Search
- ❖ Type in SS #, select search
- ❖ Select Client / PO Edit Training
- ❖ Select date of class on calendar
- ❖ Select location and Find Training
- ❖ Locate class taken and select edit
- ❖ Type "CASH" in PO box for that class

Select edit (this is done for each class paid for)