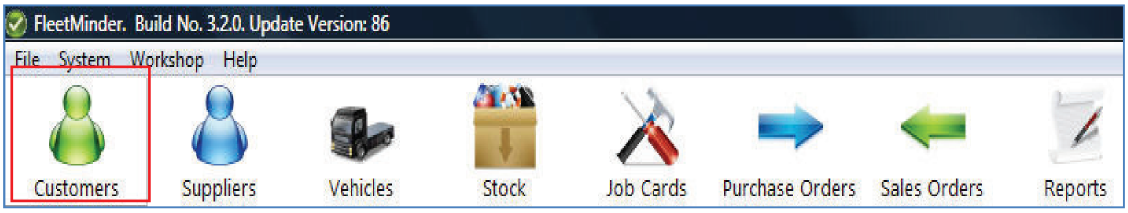
Chapter 3

Customers

Create a New Customer

Click ***Customers*** on the top bar of buttons on the main screen.

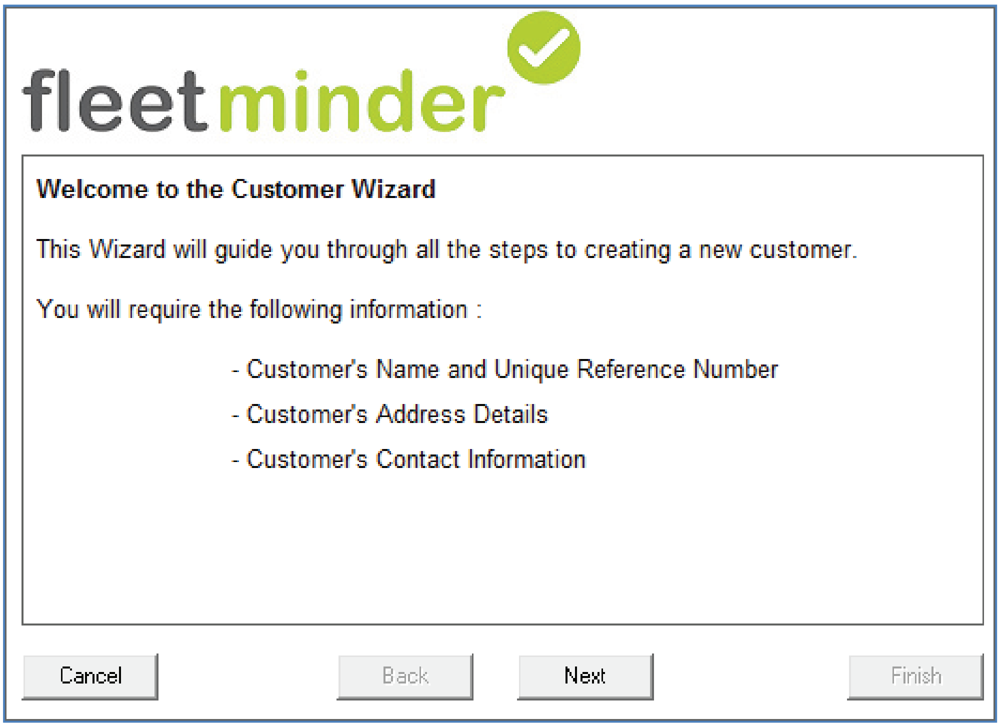


Customers Section

To enter a new customer on the system, click ***New Customer***.

New Customer

This will bring up a ***Customer Wizard*** screen into which we must fill in the basic details regarding this customer.



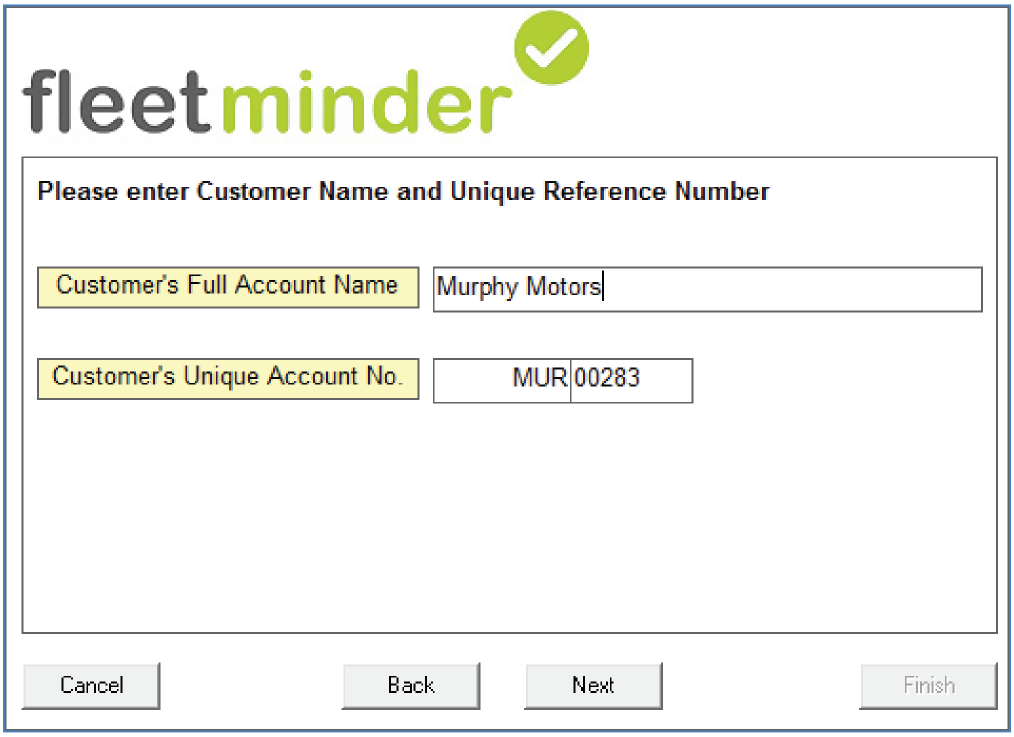
Customer wizard

The first screen welcomes you to the Customer Wizard and points out the main three items that are needed to enter a customer:

- *Customer’s Name and Unique Reference Number*
- *Customer’s Address Details*
- *Customer’s Contact Information*

Click ***Next*** to continue to the next screen.

You can click ***Cancel*** at any time to exit the wizard.



Customer Name

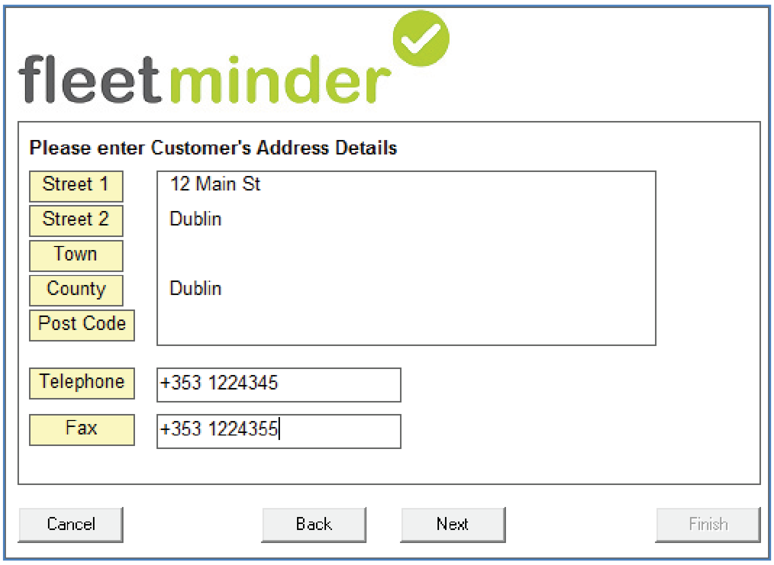
The next screen requests the ***Customer’s Full Account Name***.

As you enter the name, the system generates the ***Customer’s Unique Account No.***

This unique Account is used reference number in FleetMinder.

Click ***Next*** to continue to the following screen.

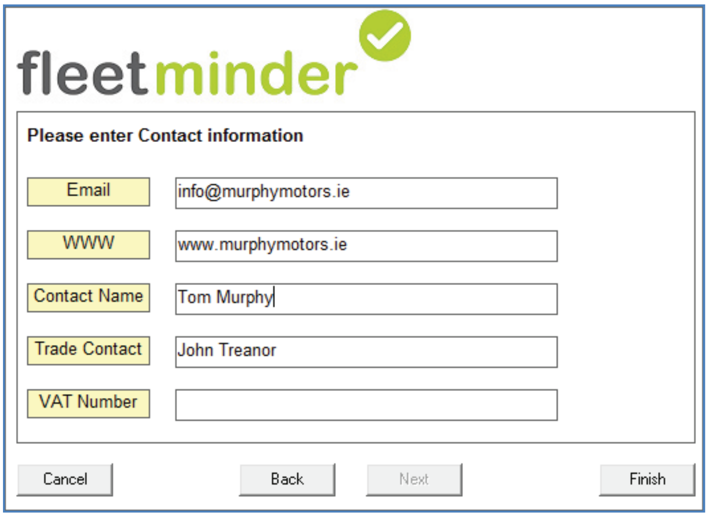
Click ***Back*** to return to the previous screen if you wish to alter any details.



Customer Address

The next screen looks for the ***Customer's Address*** and ***Contact Details***. Fill in these details as appropriate.

Click ***Next*** to move onto the next screen.



Contact Information

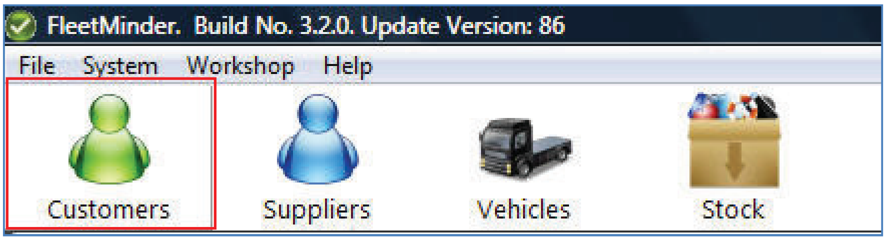
On the final screen there is space for:

- *Email address*
- *WWW website address*
- *Contact Name*
- *Trade Contact name*
- *VAT Number.*

Note – if an email address is entered then it will be used if you email an invoice/credit note to this customer.

Click on ***Finish*** to complete the creation of a new customer on your system.

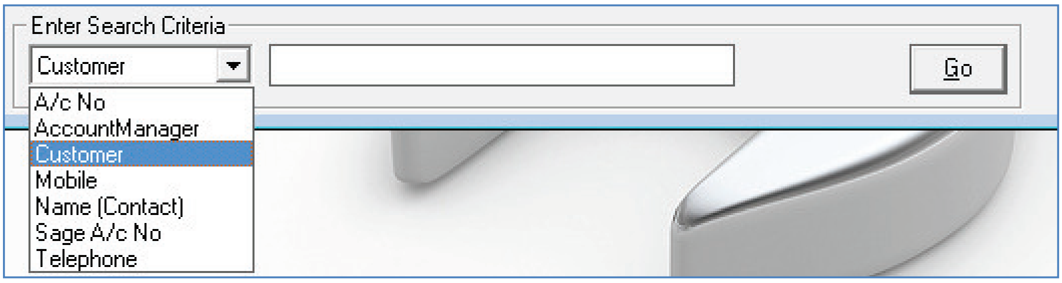
Search for a Customer



Customers Section

Click ***Customers***.

A search criteria section is visible at the bottom left of the new screen.



Search Criteria Categories

You can select the criteria by which you wish to search:

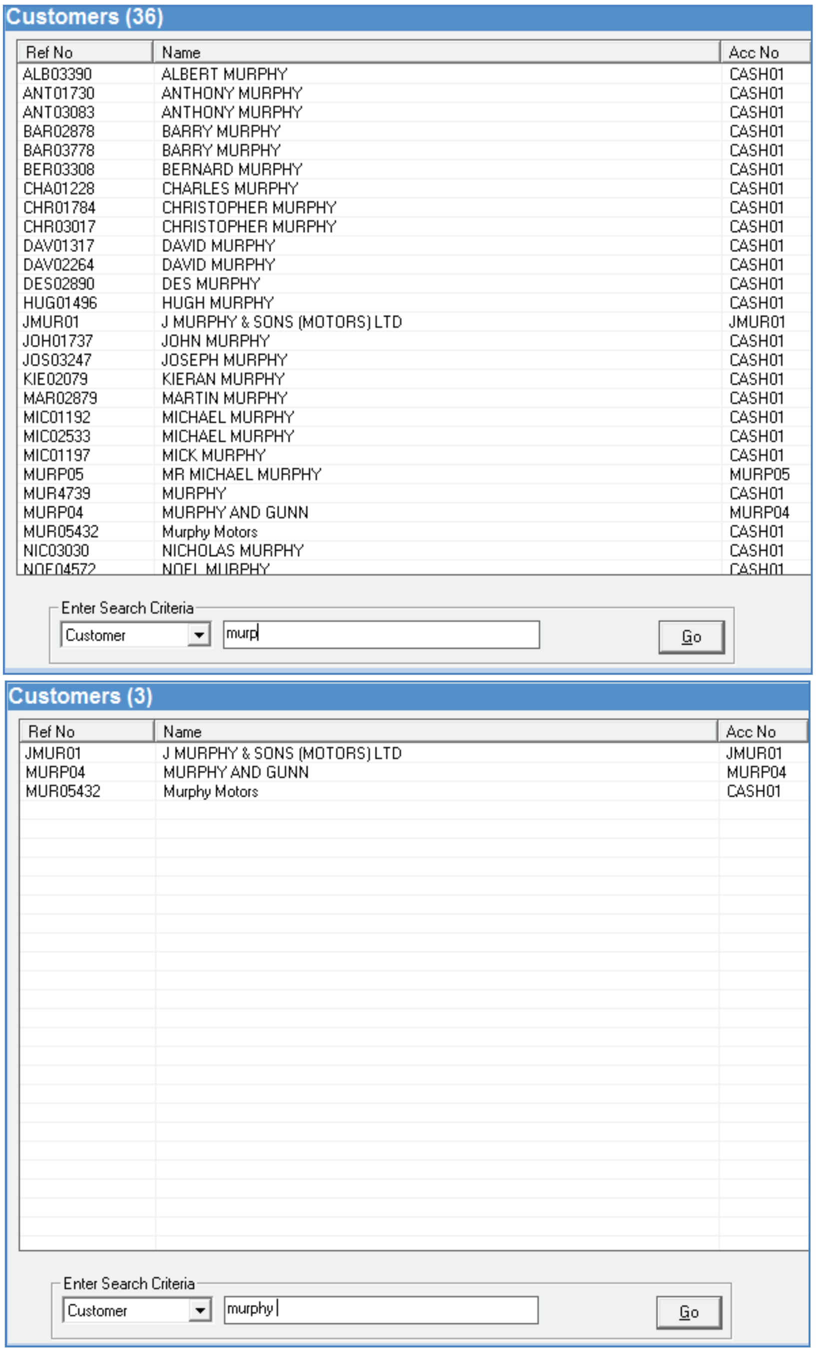
Account Number,
Name of Account Manager,
Customer's name,
Mobile Phone Number,
Contact Name,
Sage Account Number or
Telephone number.

In our example, we will use the search field Customer.

After selecting *Customer* from the search criteria area, start typing in the name of the customer for whom you wish to search.

In our example, we are using the first word of the customer's name to start our search: ***murphy***.

NOTE - As you type FleetMinder will automatically narrow down the list of customers.



Customer Search

Please note, it searches for the text you have typed anywhere the name, so in this example, we could also type ***motors*** in the search field and expect to receive Murphy Motors in the results.

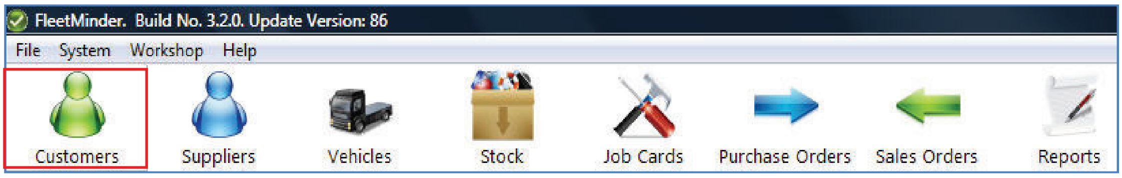
The more letters you type in, the more refined the search.

If you cannot find the customer immediately, try using fewer letters – in this example, if we accidentally misspelled our search field as ***muphy***, we wouldn't receive the desired result.

Once we have found the customer we want, double click to open the customer record.

View a Customer's Details

Click ***Customers***.



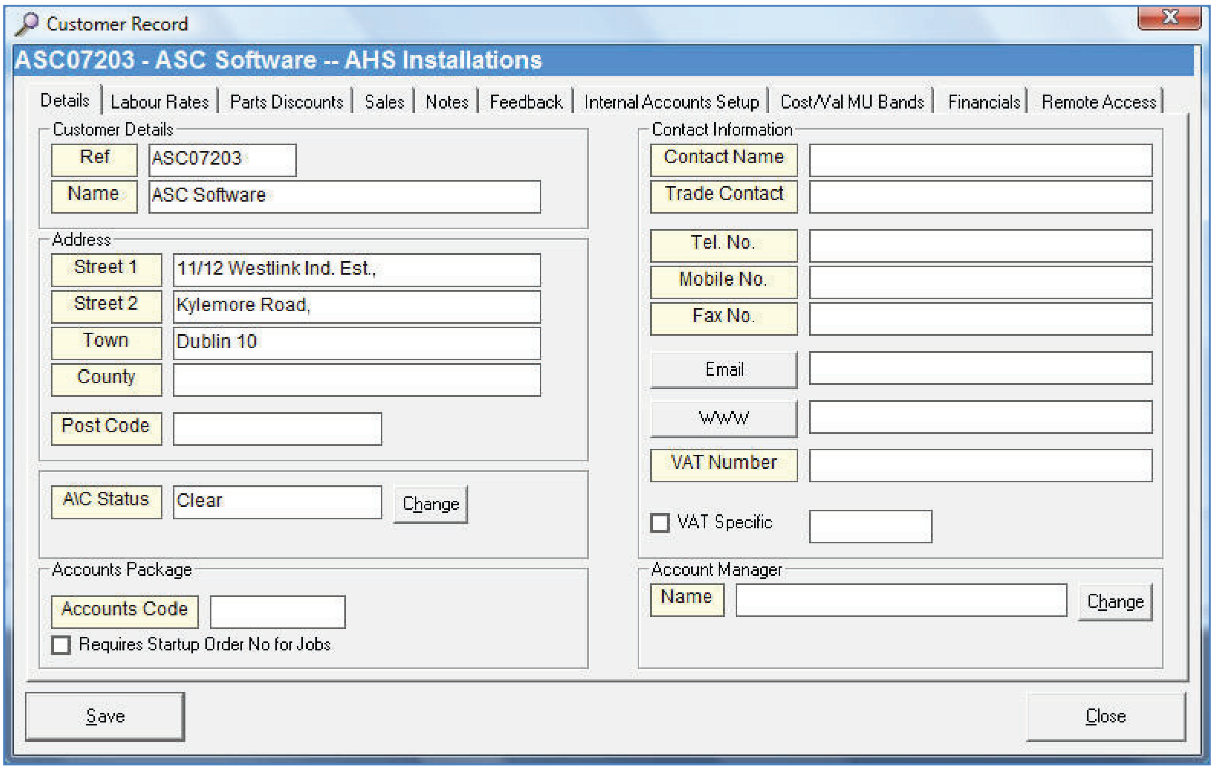
Customers Section

Carry out a search for the customer that you wish to edit.

When the grid displays the correct result of the search, highlight the line and double-click or click on ***Record*** button.

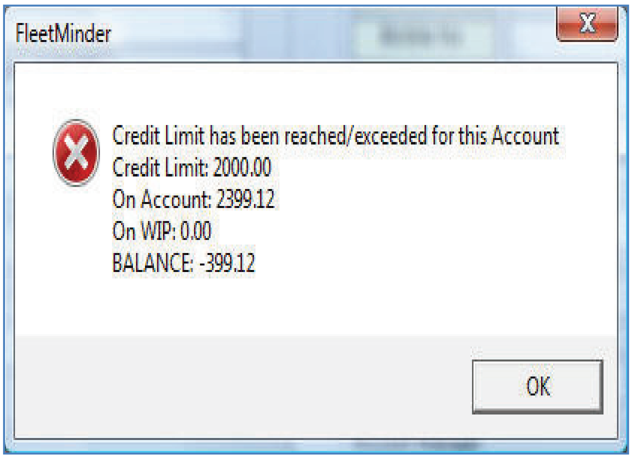
Open Customer Record

The customer's record will then be displayed.



Customer Record

If the customer has gone over their Sage credit limit then a message informing you of the details will be displayed when you open the customer record.



Credit Limit Warning

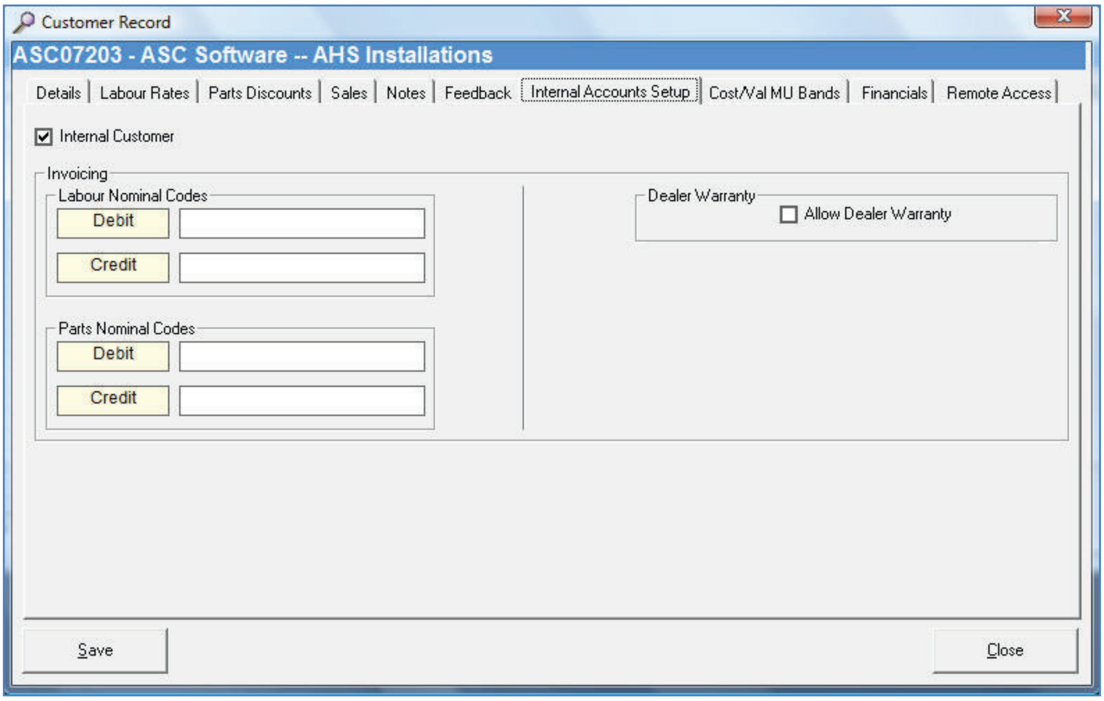
Click ***OK*** to close the credit limit message.

This warning is only intended as a guideline, you will still be able process Job Cards and Sales Orders as normal for this customer.

Set a Customer as an "Internal Customer"

Open the customer's record for editing.

Click on the ***Internal Accounts Setup*** tab.



Internal Customer

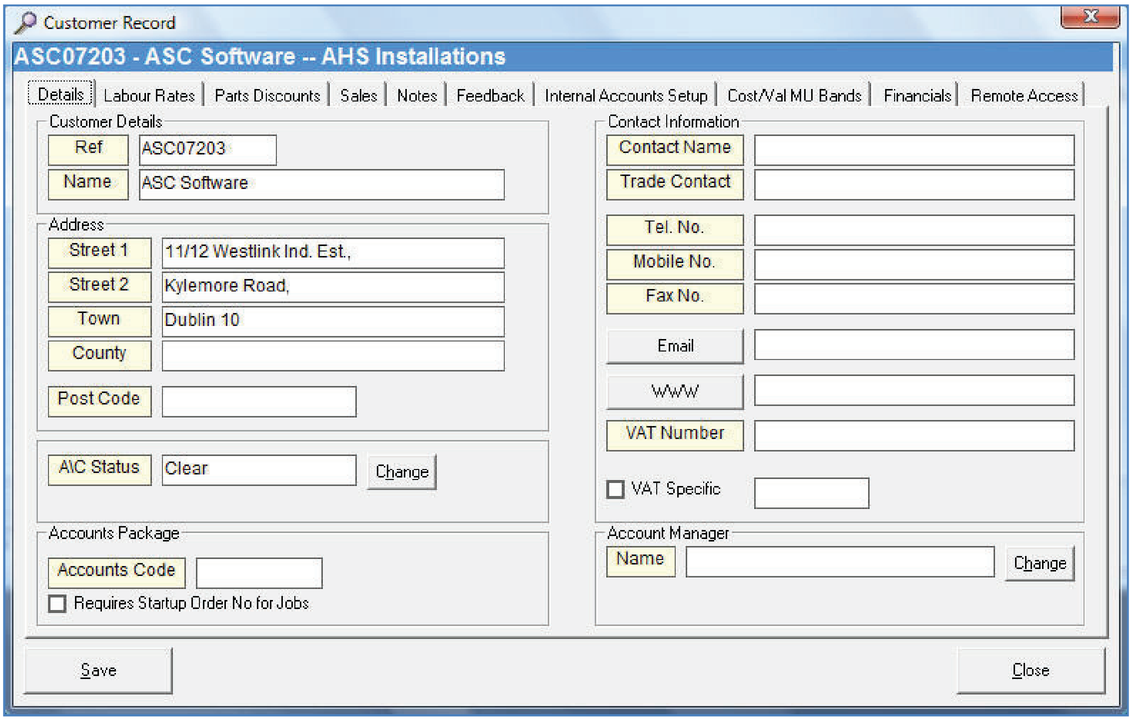
On the left hand side, there is a box with the title, *Internal Customer*. If this is checked, the customer will be treated as an internal customer when being billed for jobs, invoices are being created etc.

An *Internal Customer* will use different Sage accounts than standard customers, to view these accounts click on the ***Internal Accounts Setup*** tab.

If you do not want a customer to be marked as internal, uncheck this box and they will be treated as regular external customers on the system.

Edit a Customer’s Details

Open the customer’s record.



Edit Customer

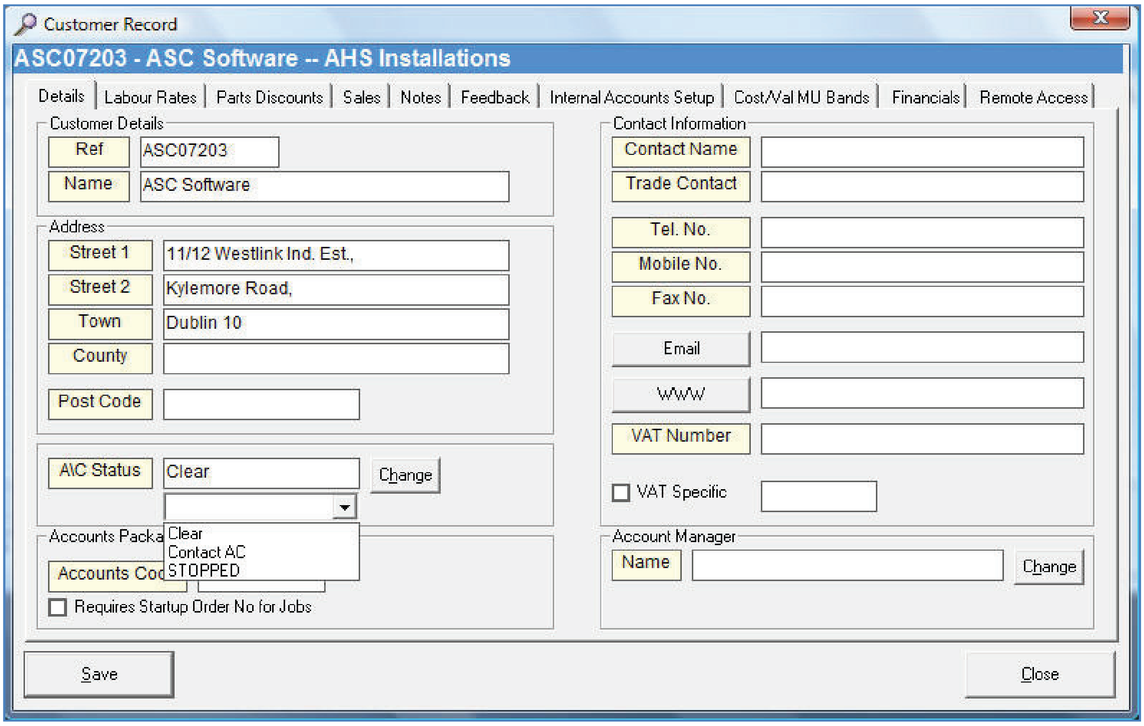
Click on the ***Details*** tab.

The main basic fields that can be edited at this stage are:

Name,
Address {Street 1, Street 2, Town, County, Post Code},
Contact Name,
Trade Contact,
Tel. No.,
Mobile No.,
Fax No.,
Email and
WWW {Website address}.

The other sections that can be edited will be looked at in details in the following pages.

Change the Status on a Customer’s Account



Account Status

Open the customer’s record for editing. Click on the ***Details*** tab.

At the *A/C Status* field, click on the ***Change*** button.
A drop down box will appear.
Click on the arrow at the drop down box to reveal other statuses:

- ***Clear***
- ***Contact AC***
- ***Stopped***

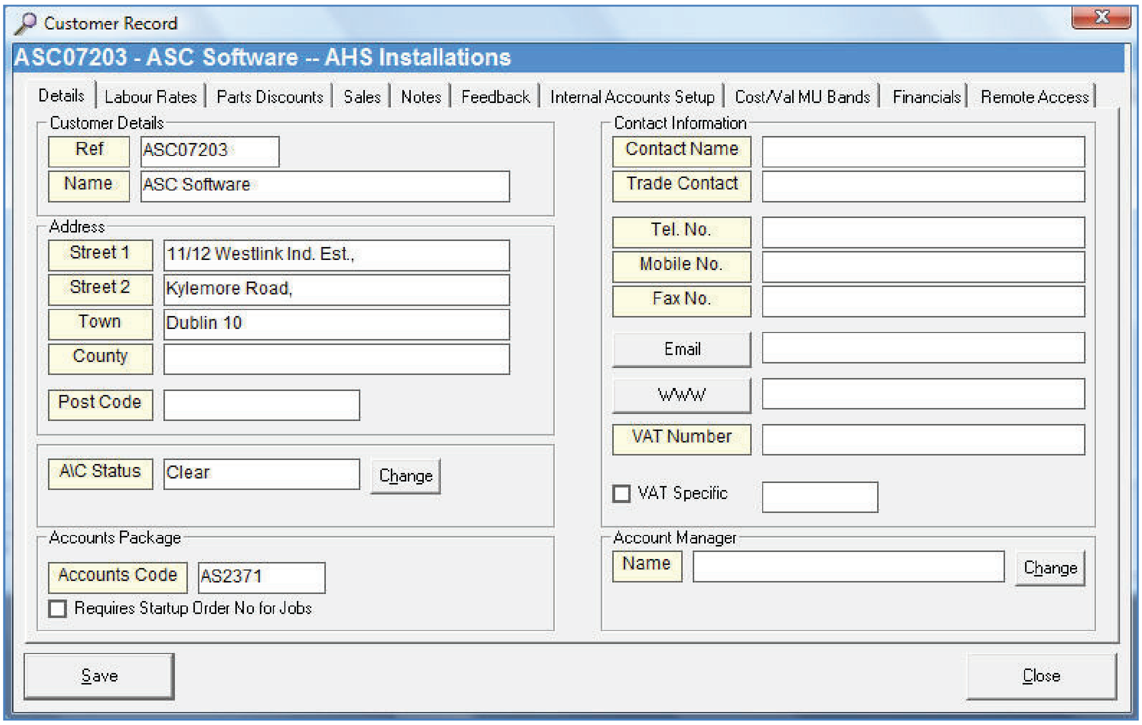
Click on the status you want to select.

Click on ***Save*** when you have completed your alterations and want to exit the customer’s records.

Click on ***Close*** if you want to quit without saving your changes.

Assign an Accounts Package Account Code to a Customer

Open the customer's record for editing.
Click on the ***Details*** tab.

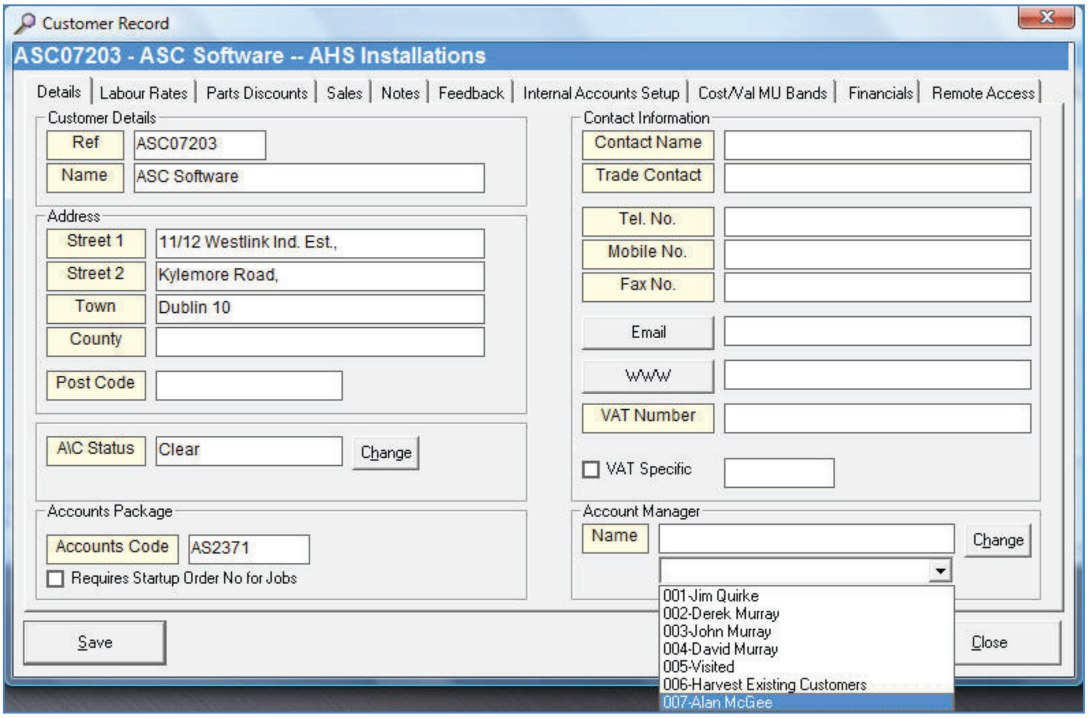


Accounts package Accounts Code

In the *Accounts Package: Accounts Code* field you can fill in a reference code for this customer so that when the information is being synchronized between FleetMinder and your accounts package, the package knows which customer you are referencing.

This field is also used by FleetMinder to bring across the customer's credit limit and account balance.

Assign an Account Manager to a Customer



Account Manager

Open the customer's record for editing.
Click on the ***Details*** tab.

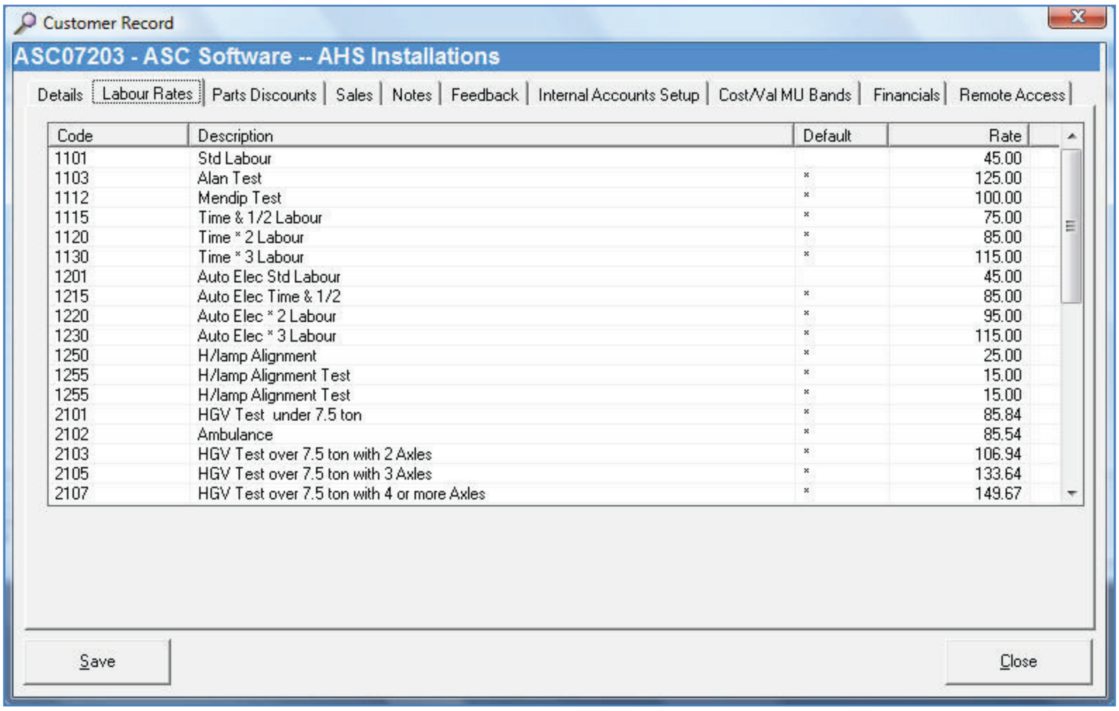
Beside the *Account Manager* field, click on the ***Change*** button.
A drop down list of Account Managers will appear.
Select the manager that you wish to allocate to the customer.

Click ***Save*** button to save the alterations.
Click ***Close*** to exit without saving any alterations.

You can setup Account Managers by selecting ***System*** and ***Account Manager***.

View the Labour Rates for a Customer

Open the customer’s record for editing.
Click on the ***Labour Rates*** tab.



Code	Description	Default	Rate
1101	Std Labour		45.00
1103	Alan Test	*	125.00
1112	Mendip Test	*	100.00
1115	Time & 1/2 Labour	*	75.00
1120	Time * 2 Labour	*	85.00
1130	Time * 3 Labour	*	115.00
1201	Auto Elec Std Labour		45.00
1215	Auto Elec Time & 1/2	*	85.00
1220	Auto Elec * 2 Labour	*	95.00
1230	Auto Elec * 3 Labour	*	115.00
1250	H/lamp Alignment	*	25.00
1255	H/lamp Alignment Test	*	15.00
1255	H/lamp Alignment Test	*	15.00
2101	HGV Test under 7.5 ton	*	85.84
2102	Ambulance	*	85.54
2103	HGV Test over 7.5 ton with 2 Axles	*	106.94
2105	HGV Test over 7.5 ton with 3 Axles	*	133.64
2107	HGV Test over 7.5 ton with 4 or more Axles	*	149.67

Custom Labour Rates

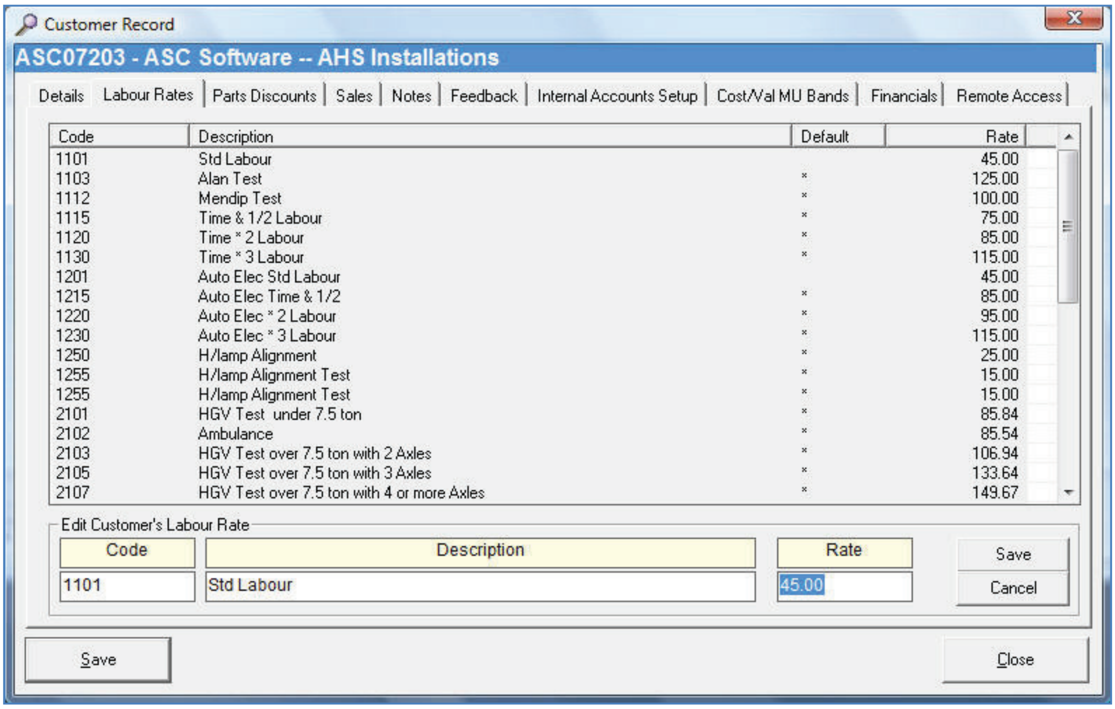
Against each *Code* you can view the description.

The *Default* field notes whether or not this is the default rate for this labour or if it is individualised for this customer. A * highlights that it is the default value.

The *Rate* field shows the actual rate at which this customer will be charged for each specific type of labour.

Alter a Labour Rate for a Customer

Open the customer's record for editing.
Click on the ***Labour Rates*** tab.



Edit Custom Labour Rate

Select the Labour Rate you wish to alter by double-clicking on the *Description* of the Labour Code.

A new frame will open, *Edit Customer's Labour Rate*.

The *Code* field and the *Description* field cannot be altered; however, you can change the *Rate* field so that this customer will be charged at a different value for that type of labour.

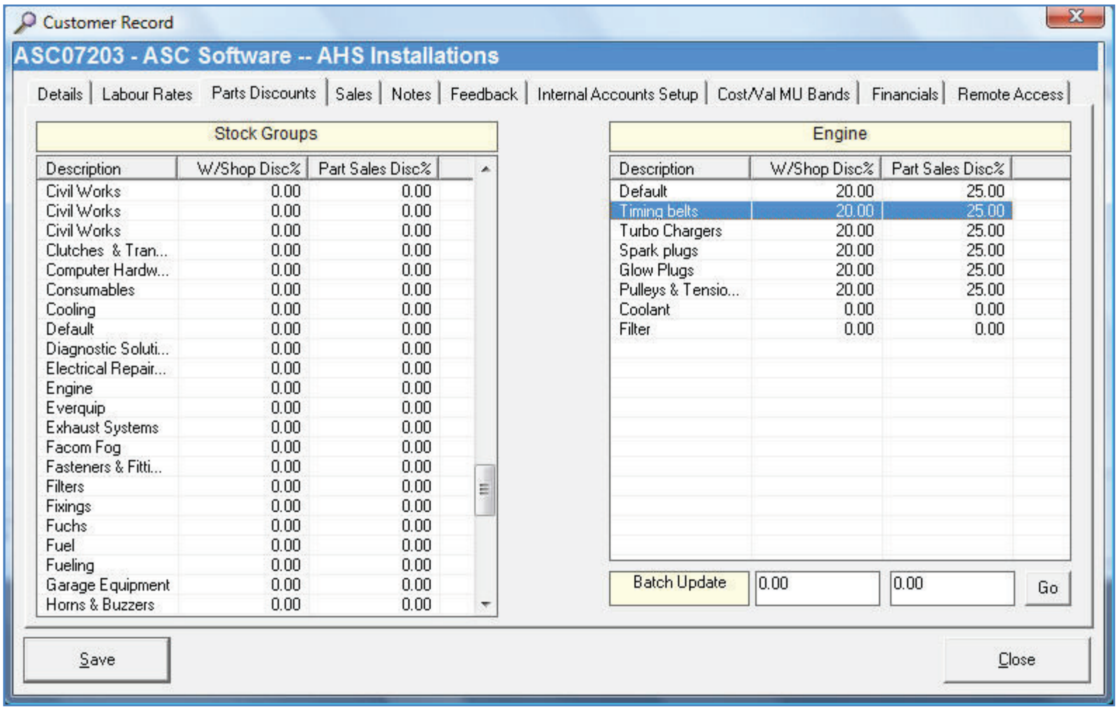
Click ***Cancel*** if you do not wish to save the alterations that you have made.
Click ***Save*** if you want to store the changes.

If you save the rate and it is different to the default value, you will note that in the grid, that particular labour rate does not have a * in the *Default* field.

View the Parts Discounts for a Customer

Open the customer's record for editing.

Click on the ***Parts Discounts*** tab.



Parts Discounts

The left grid displays the *Stock Groups*.

You can view the percentage value *Workshop Discount* (Job Card) and also the *Parts Sales Discount* (Sales Order).

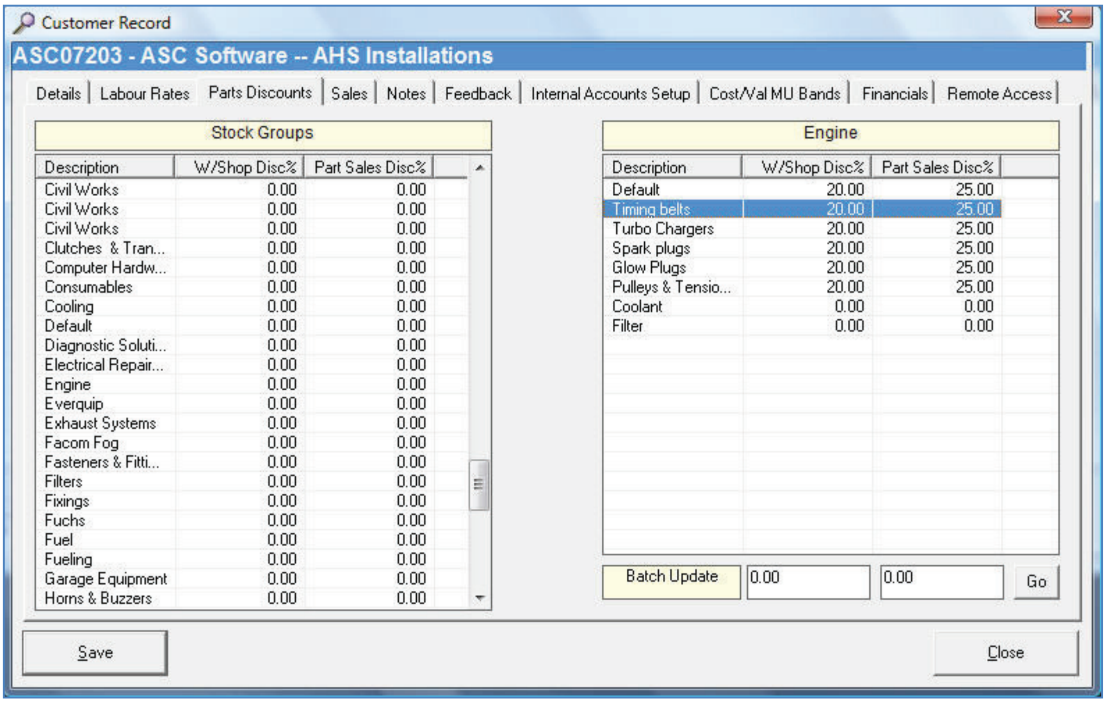
If you click on a stock group within this grid, it will open a second grid, on the right, displaying all the *Sub Stock Groups* within that stock group.
Again, this displays the *Workshop Discount* in percentage value and also the *Parts Sales Discount*.

To view other Sub Stock Group items you simply click on a different stock group on the left.

Click ***Save*** or ***Close*** to exit.

Edit the Parts Discounts for a Customer

Open the customer's record for editing.
Click on the ***Parts Discounts*** tab.



Parts Discounts table for a customer

The left grid displays the *Stock Groups*.

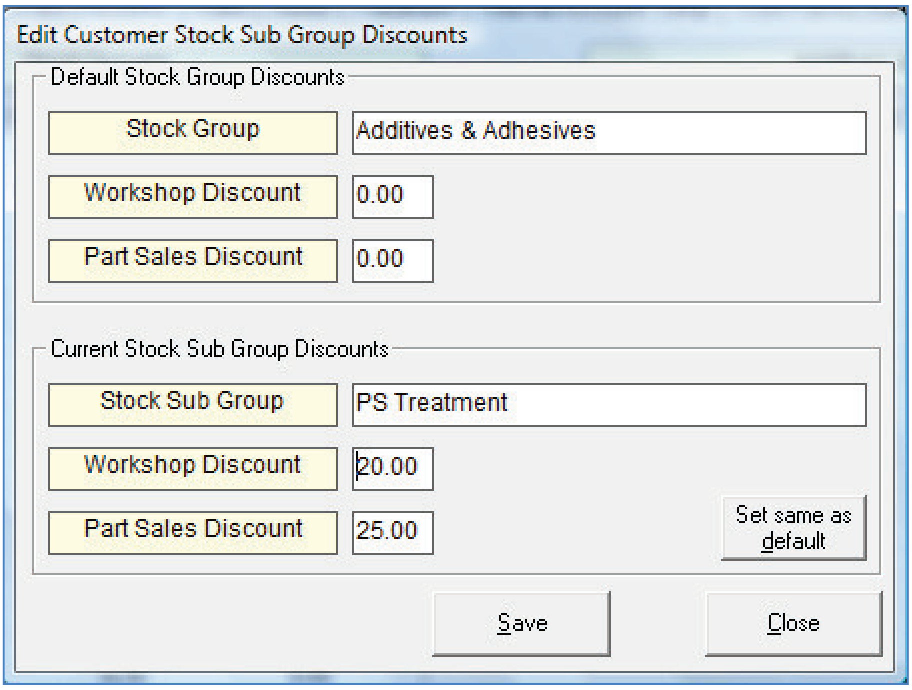
You can view the percentage value *Workshop Discount* and also the *Parts Sales Discount*.

Click on a stock group within this grid that has a sub stock group item which you wish to edit.

It will open a second grid, on the right, displaying all the *Sub Stock Groups* within that stock group.

Again, this displays the *Workshop Discount* in percentage value and also the *Parts Sales Discount*.

To edit the *Workshop Discount* or *Parts Sales Discount* for any of the Sub Stock Group items, double-click on the item.



Sub Stock Group Discount

The display will show the Stock Group item and the discounts that are applied for them.
Underneath there is the Sub Stock Group item, that you selected.

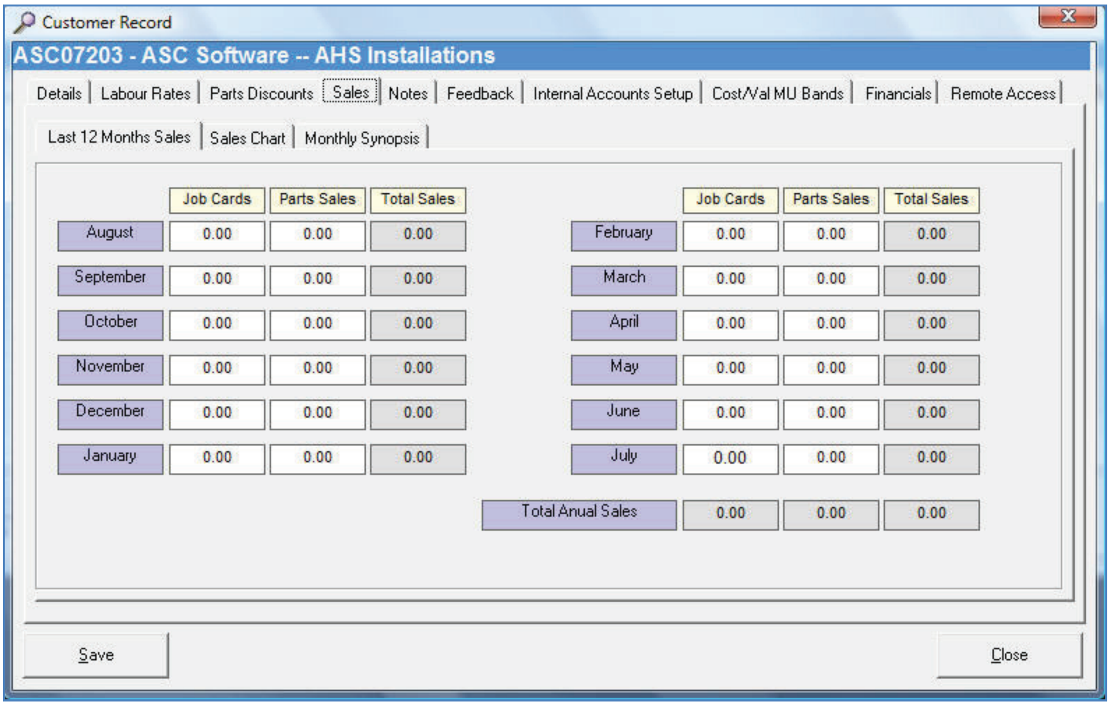
In the *Workshop Discount* and *Part Sales Discount* fields you alter the discount values, in percentages, that you want to give to this customer on the sale of this part.

If you want to set the values to the default value for that stock sub group, click ***Set Same as Default*** button and it will alter both Workshop and Part Sales discount values.

Click ***Save*** to record the values that you have input and exit.
Click ***Close*** to exit without saving.

View a Report of Last 12 Months Sales to a Customer

Open the customer's record for editing.
Click on the ***Sales*** tab.
Click on the ***Last 12 Months Sales*** tab.



Customer Sales

This is the numerical version of the report.

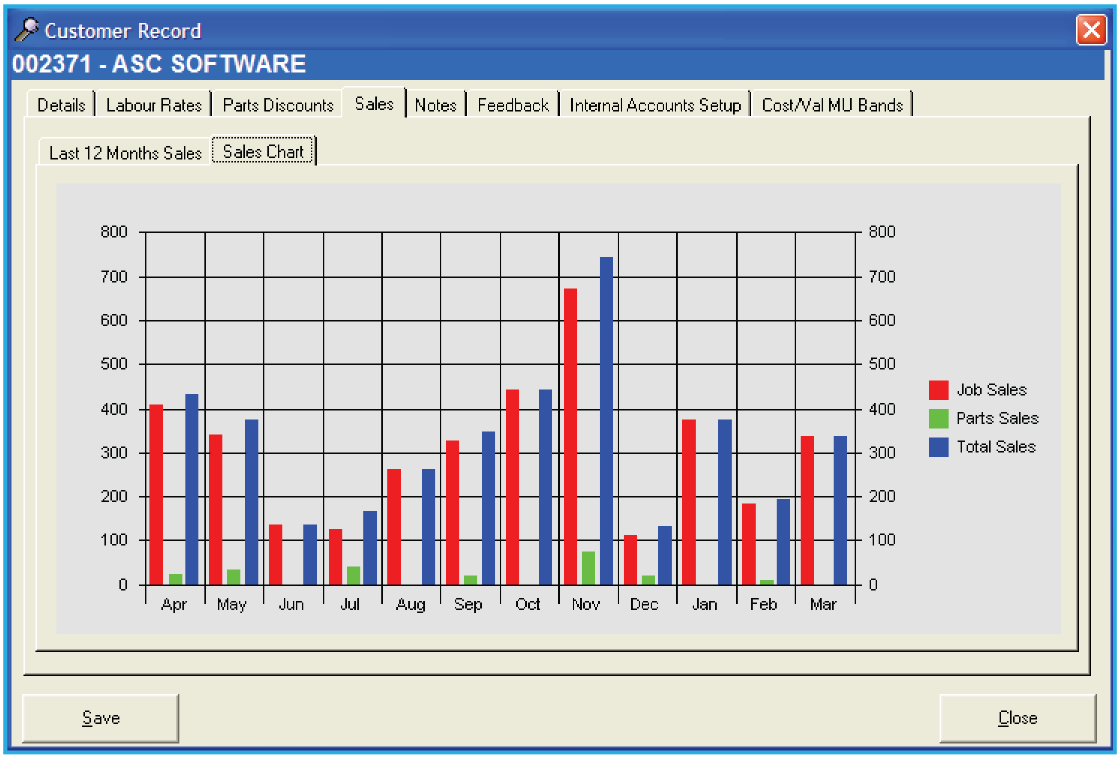
You will see a grid on the last twelve months in two groups of 6.
For each month you will note there is a corresponding *Job Cards* figure (sum of Labour and Parts on the job card) and *Parts Sales* (Sales Orders) figure. These are added together to give the sum in the *Total Sales* figure.

At the end, there is a *Total Annual Sales* field, which displays the *Total Job Cards* figure, the *Total Parts Sales* figure and the overall *Total Sales* of all these figures added together.

As you progress through the year, this report updates itself so that you always have the previous 12 months on display without any input from the user being necessary.

View the Chart of Sales to a Customer

Open the customer's record for editing.
Click on the ***Sales*** tab.
Click on the ***Sales Chart*** tab.



Sales Chart

This is the visual version of the "***Last 12 Months Sales***" report.

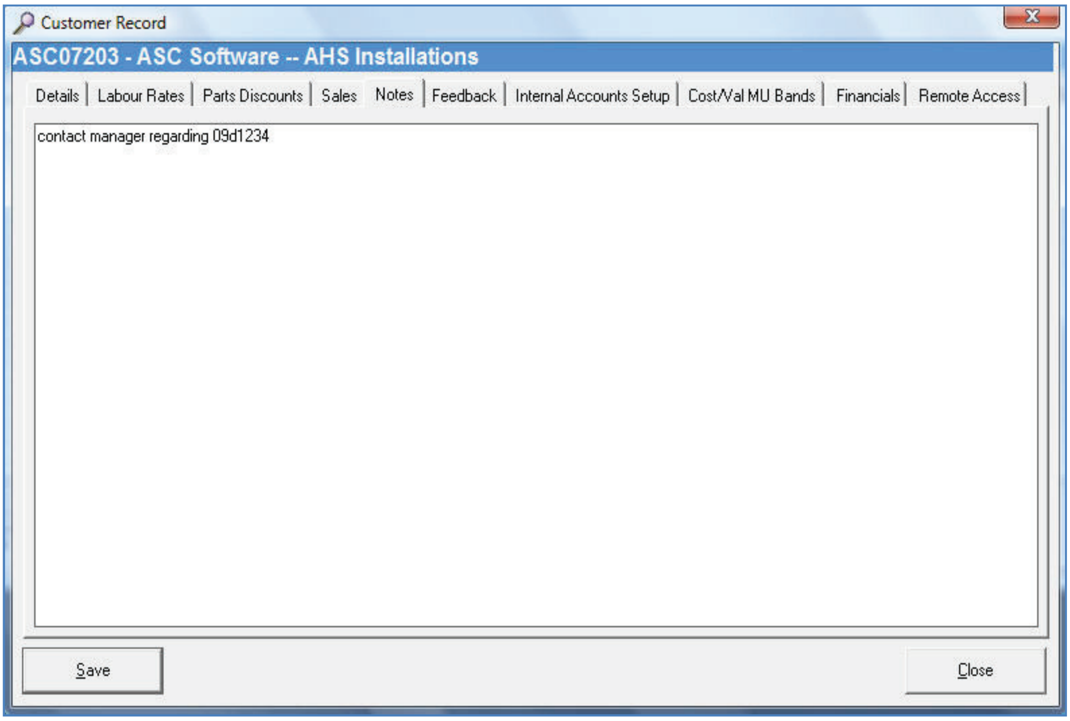
You will see the chart is a display of *Job Sales figure* (red bars), Sales Order *Parts Sales figure* (green bars) and *Total Sales figure* (blue bars) for each of the previous 12 months.

As you progress through the year, the chart adjusts itself so that you will always have a view of the sales in the immediate previous 12 months.

Create, Edit or View a Note

Open the customer record.

Click on the ***Notes*** tab.

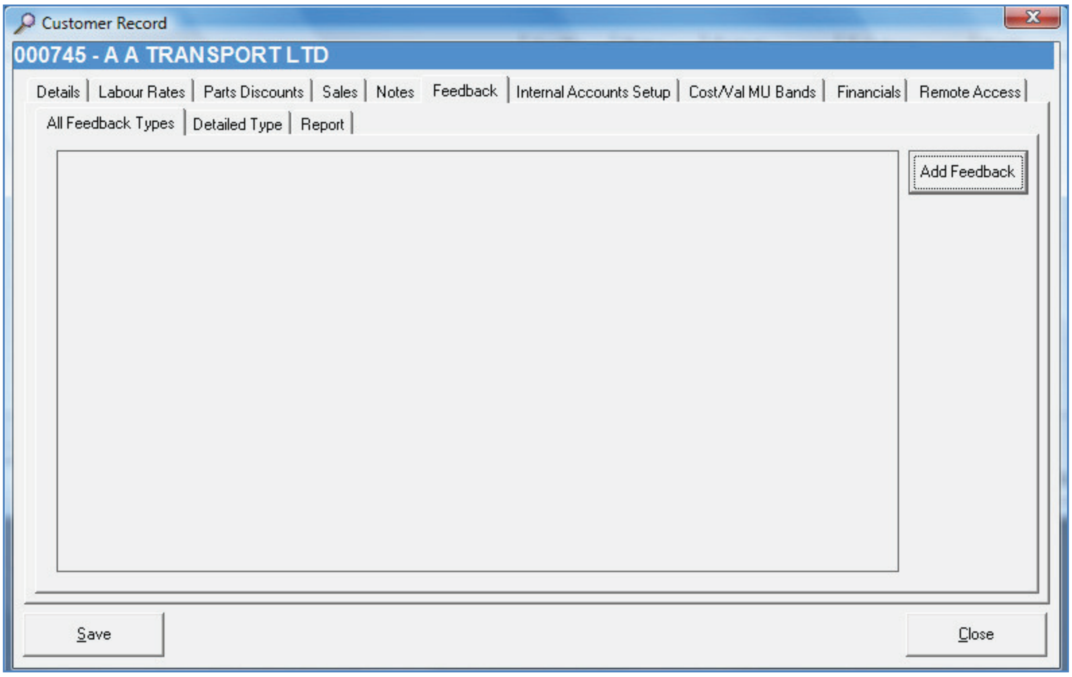


Customer Notes

Any notes that have been previously written here can be viewed irrespective of who wrote them. Notes can be added or amended once you are an authorised user of this area on the system.

Add Customer Feedback

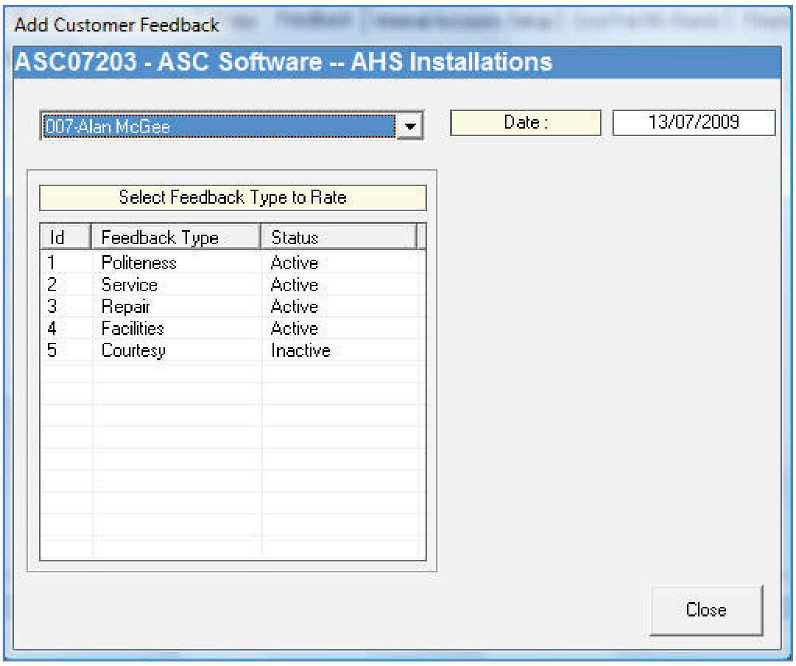
Open the customer's record for editing.
Click on the ***Feedback*** tab.
Click on the ***All Feedback Types*** tab.



Customer Feedback

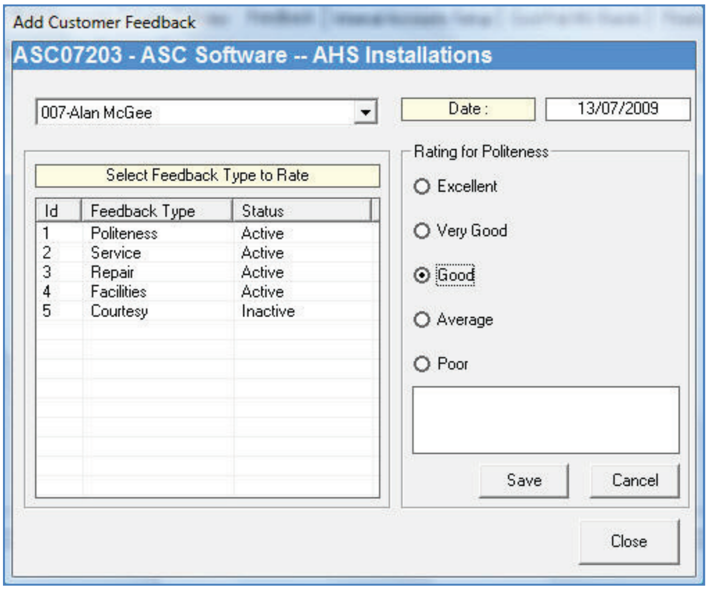
Initially, this screen is blank apart from an ***Add Feedback*** button.

To add feedback, click on the ***Add Feedback*** button.



Select an Account Manager

You are prompted to select an Account Manager from the list of Account Managers. Use the drop down box to view the list and click on the appropriate name.



Courtesy Feedback Rating

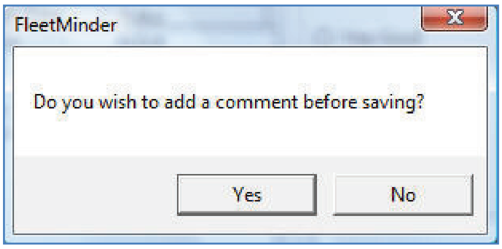
A grid is displayed showing all the types of feedback.
Click on the Feedback Type for which you wish to record a rating.
In this example, we are using **Service**.

The *Date* field cannot be altered – this is taken from today's date.

In the *Rating For …* frame, click on the rating.
The ratings are "Excellent", "Very Good", "Good", "Average" and "Poor".

In the text box below, you can enter any comment that the customer has to add. Click ***Save*** if you want to record the feedback. Click ***Cancel*** if you do not want to store the feedback details.

If you click ***Save*** and there is no comment in the text box, a message will appear asking you "***Do you wish to add a comment before saving?***"

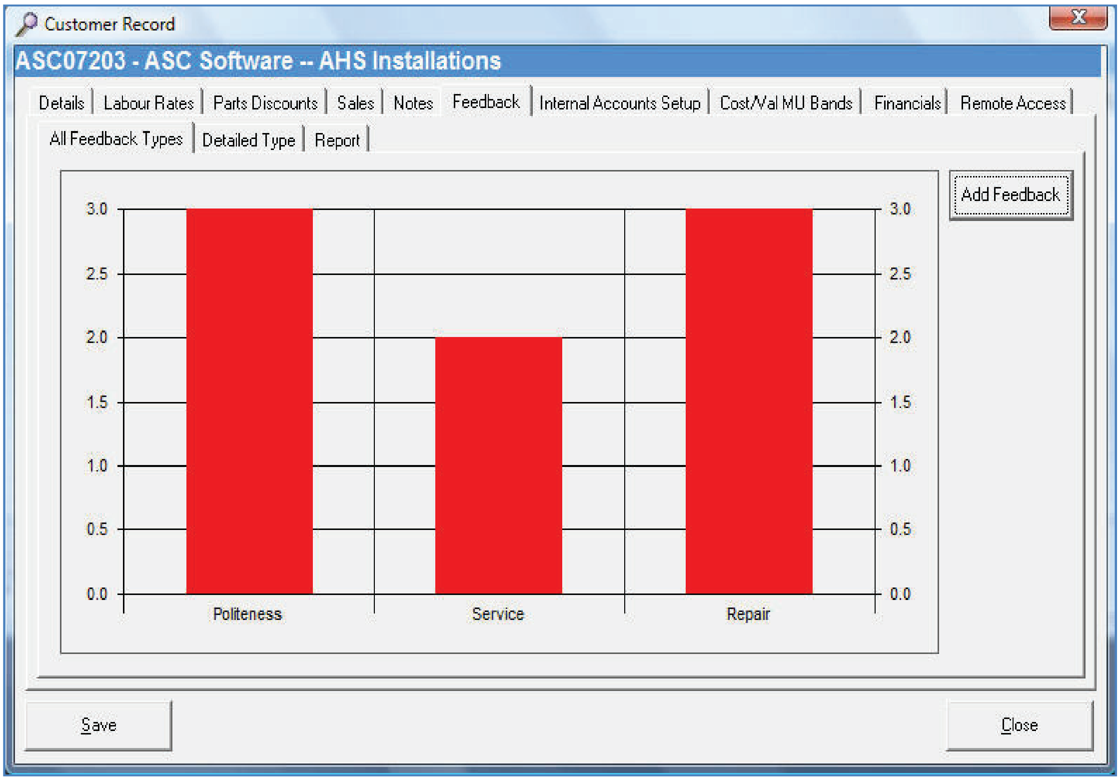


Add Comment

If you want to return and add a comment, click ***Yes***.
Otherwise, if you wish to continue without storing a comment, click ***No***.
When you are finished, click the ***Close*** button to exit this section.

View Graph of All Feedback Types

Open the customer's record for editing.
Click on the ***Feedback*** tab.
Click on the ***All Feedback Types*** tab.

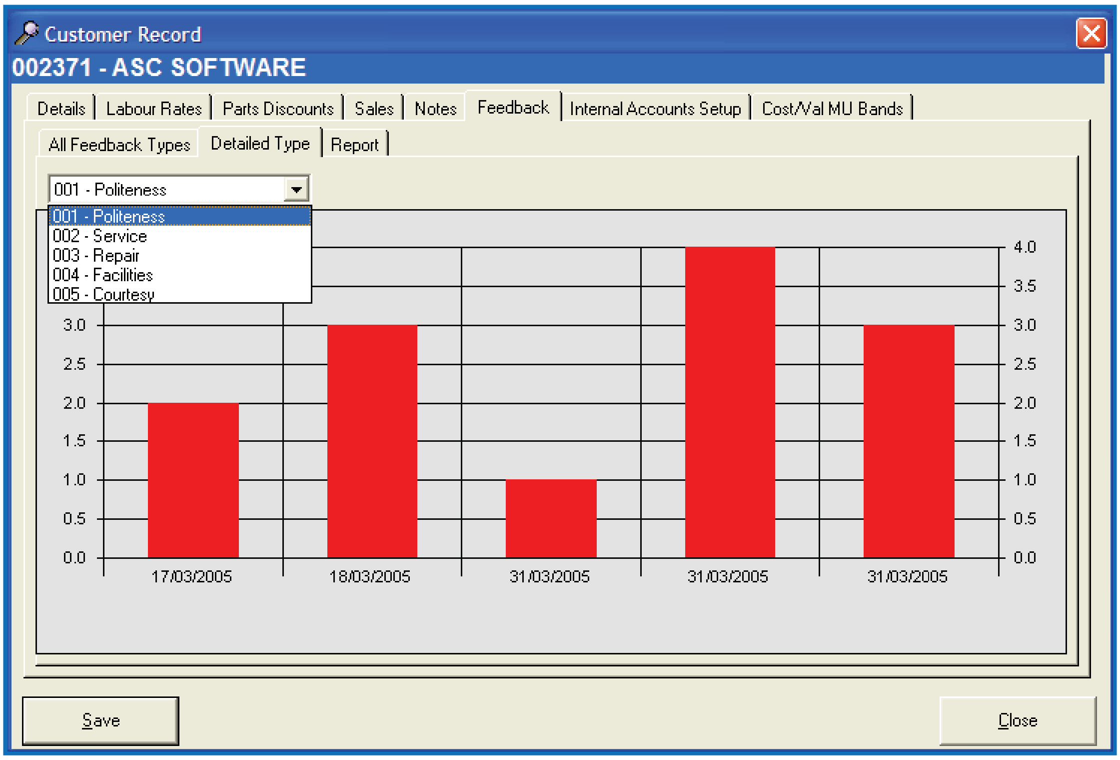


Bar Graph of Feedback

As the user adds more and more feedback types and feedback results to the system, it adds to this graph and so is always showing you an accurate representation of the feedback from this customer.

View Graph of Customer's Last 10 Feedbacks

Open the customer's record for editing.
Click on the ***Feedback*** tab.
Click on the ***Detailed Type*** tab.



Feedback Type

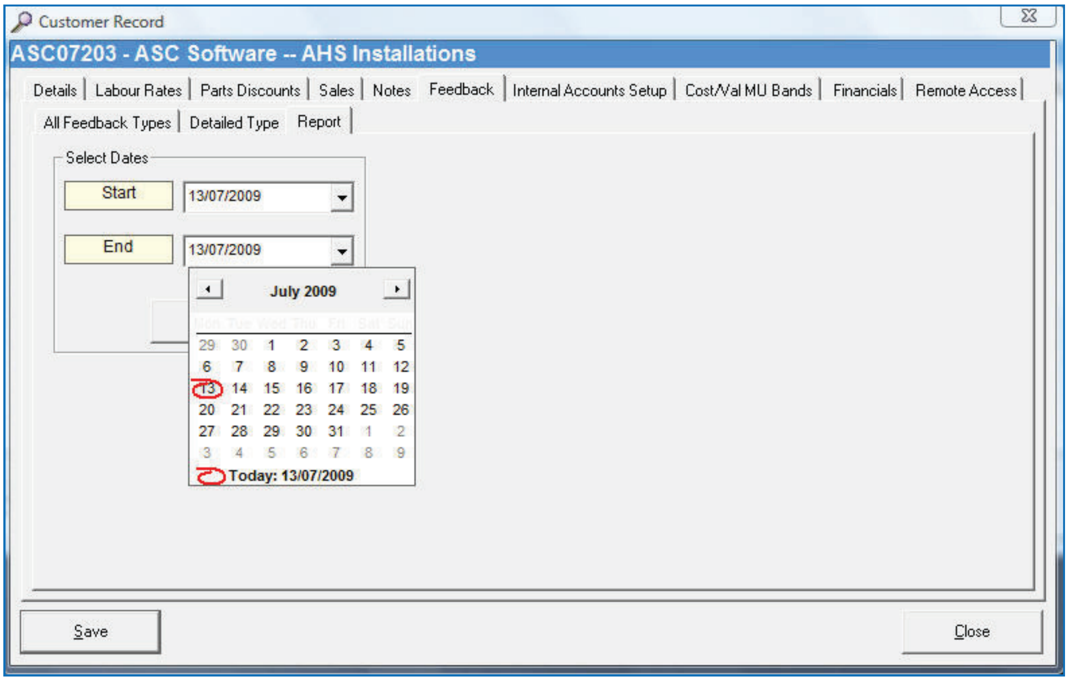
By using the drop-down box, view the list of Feedback Category types and click on the one of which you wish to view the detailed graph.

A graph appears showing you, date by date, the values that your company has received from this customer, under the Feedback Category that you selected. In this example, we used Feedback type **001-Politeness**.

Click ***Save*** or ***Close*** to exit the customer record.

View A Customer Feedback Report by Date Range

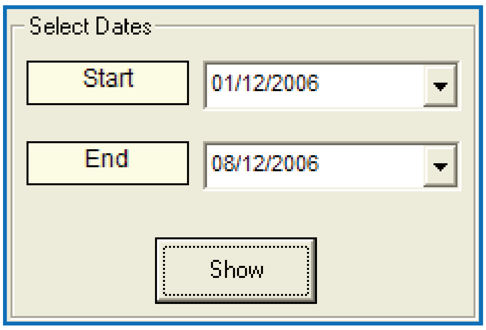
Open the customer's record for editing.
Click on the ***Feedback*** tab.
Click on the ***Report*** tab.



Date Range

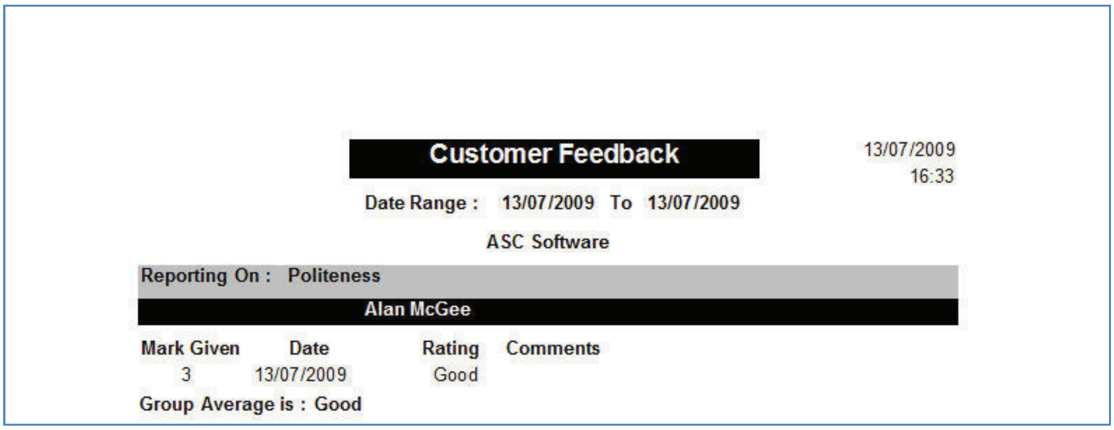
In the *Start Dates: Start* field you can either:
Type the date into the box directly
or
Click on the drop-down calendar facility and click on the date.

Likewise, in the *Start Dates: End* field, you can either:
Type the date into the box directly
or
Click on the drop-down calendar facility and click on the date.



Start and End Date

When you have completed your start and end dates, click on ***Show***.



Customer Feedback Report

A report will display showing each *Feedback Type* on a new page.

They are grouped by *Account Managers* and then under each Account Manager you can view the *Mark Given*, the *Date* the mark was given, the Rating and any Comments by the customer.

You can print this report by clicking ***Print*** and then by selecting the printer.

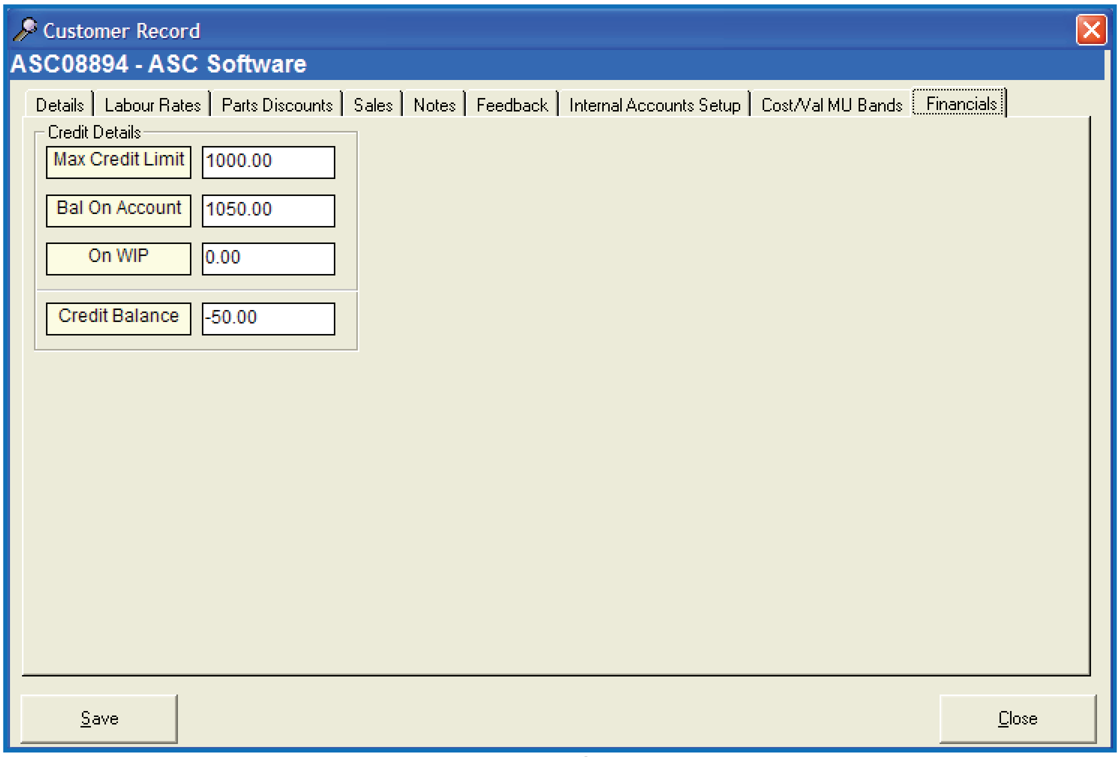
To exit the report, click  in the top right corner to bring you back to the customer record.

Click ***Close*** to exit the customer record area completely.

Financials Section (Credit Limit)

When the SageLink interface runs at night, FleetMinder picks up the credit limit and balance on the customer's account in Sage.

To view this information in FleetMinder, open the customer record and click on the ***Financials*** tab.



Financials Section

The *Credit Details* are then displayed.

- *Max Credit Limit* – this is the customer's credit limit on Sage
- *Bal On Account* – this is customers a/c balance on Sage
- *On WIP* – this is the current value of work done for this customer on FleetMinder that has not been posted to Sage yet.
- *Credit Balance* – this is the amount the customer is over or under their Credit Limit (including WIP)

These values cannot be changed in FleetMinder (except WIP), they can only be viewed. Changes to these figures (except WIP) must be made in Sage.