User Guide

Module CUSTOMER v2.0

ECONOMIX Solutions

Module CUSTOMER

Introduction to the module

The module « CUSTOMER » is designed to answer your needs in the management of your customer forms. This tool allows you to manage entirely your customer's information with two functions integrated to other Economix solutions modules:

- Creating/modifying the active customer forms
- Consulting the history of active customers
- Integrating customer forms to related modules

Module CUSTOMER

Training plan

Module CUSTOMER

Reaching the module CUSTOMER

1. Click **Customers** or, under the menu **Forms**, click **Customer**

Creating a customer form (manual mode)

1. Click **Add**
2. Complete the desired field, such as: name, address, email, etc.
3. Click **Save** after completing the desired modifications, if need be

NOTE The field **Language** will determine in which language the customer will receive its communications.

Creating a customer form (web integration mode – Canada 411)

1. Click **Customers**
2. Click **Search**
3. Select **1. Telephone**
4. Enter the phone number for the client to search
5. Click **Canada 411**
6. Once the searched customer is found, click **Copy**
7. Click **OK**
8. Complete the desired information related to the customer form
9. Click **Save** after completing the desired modifications, if need be

NOTE The search criterion **1. Telephone** is the only criteria compatible with the web integration - Canada 411.

NOTE If case of a non successful search with the web integration - Canada 411, the customer's phone number might not be listed in the Bell phone directory for the following reasons: cellular number, confidential number, service provider other than Bell, company number.

Assigning a tax code to a customer form

1. Click on the drop-down menu **Tax**

2. Click on the desired tax code, beforehand defined in the menu **Options – Taxes**

NOTE If no tax code is selected, the application will assign the default tax to your system.

NOTE The GST and PST buttons can be marked at « No » for customers benefiting from a tax exemption.

Creating a sponsorship plan for a customer form

1. Position the cursor at the field **Sponsorship**
2. Press the **F2** key of your keyboard
3. Enter the **sponsorship code** and description, the **percentile (%)** reduction to the desired association and the **duration** of the assigned sponsorship
4. Click **Add**

NOTE The new sponsorship will be added to the list of available sponsorships.

5. Click on the desired sponsorship
6. Click **Close**

Assigning a sponsorship plan to a customer form

1. Click on the drop-down menu **Sponsorship**
2. Click on the desired sponsorship plan

Assigning a free plan to a customer form

1. Click on the drop-down menu **Promotion**
2. Click on the desired free plan

NOTE The **Promotion** functionality is directly integrated with the folder Products. Each product likely to benefit from a free plan must be activated beforehand. Customers eligible for the promotion will benefit from the free plan after reaching the determined amount of purchases. The selection of the promotion (7) is made from a drop-down menu.

REFERENCE *Folder – Product.*

Assigning a general discount to a customer form

1. Position the cursor inside the Field **Discount (%)**
2. Enter the desired discount amount

NOTE This discount will be automatically applied to each invoice of the selected customer. In case of an invoicing exception, you'll be able to modify the discount amount.

Creating/Assigning a discount per product category to a customer form

1. Click the button of the field **Discount (%)** to visualize the discounts already created or to create new ones.
2. Position the cursor in the field **Category code**
3. Press the **F2** key of your keyboard to visualize the discounts defined beforehand in the menu **Forms/Product/Category**
4. Click on the desired discount category to select it
5. Click **Close**
6. Position the cursor in the field **Discount %**
7. Enter the desired discount amount
8. Click **Add**
9. Click **Close**

NOTE It is always possible to delete a discount by selecting it and clicking **Delete**.

NOTE The button is usable only if the discount amount is reinitialize at 0.00.

Creating/Assigning a status to a customer form

1. Click in the field **Customer type**
2. To create a new status, type the information in regards with the status directly in the field
3. To select an existing status, click on the desired status from the list

Assigning a salesman to a customer form

1. 1. Click in the field **Salesman**
2. 2. To select an existing salesman, click on the desired salesman from the list defined beforehand in the menu **Options - User**

Consulting the client list

1. Click on the button **Customers**
2. Click on the button **Customers**
3. Consult the customer list placed in alphabetical order
4. Select, from the customer list, the desired customer
5. Click the button **Reach**
6. Click the button **Save** after completing the desired modifications, if need be

Reaching a specific customer form

1. Click the button **Customers**
2. Click the button **Search**
3. Search for the customer with the search criterion offered

NOTE For the search criterion **3. Name** and **4. Contact**, the order of inscription for the information is not necessary for more flexibility.

4. Once the search criterion completed, click **OK**

NOTE If the customer does not exist, the system will offer to consult the entire list. If you do not wish to consult the entire list, click **NO**.

5. Select, among the list of the customers corresponding to the used research criterion, the desired customer
6. Click **Reach**
7. Click **Save** after completing the desired modifications, if need be

Adding a delivery address to a customer form

1. From the desired customer form, select the tab **Shipping to**
2. Complete the desired information for the delivery address
3. Click **Save** after completing the desired modifications, if need be

NOTE The delivery address must be completing only if this address is different from the purchase address. If the delivery address is not completed, the system will use the purchase address for the printing of the communications.

Creating an animal form for a customer form

1. From the desired customer form, select the tab **Animal**
2. To create a new animal form, click **Create** under the display list
3. Complete the desired information for the animal form
4. Click **Save** after completing the desired modifications, if need be

NOTE You can create multiple animal forms for the same customer form.

NOTE This functionality is exclusive to the software **Animalx**.

Assigning a groomer to an animal form

1. 1. From the desired animal form, click the field **Employee**
2. 2. To select an existing groomer, click on the desired groomer from the list defined beforehand in the menu **Options - User**

NOTE This functionality is exclusive to the software **Animalx**.

Assigning a default appointment length to an animal form

1. From the desired animal form, click the field **Block**
2. To select an existing default appointment length, click the desired block among the list beforehand defined under the module **Grooming - Parameters**

NOTE This functionality is exclusive to the software **Animalx**.

Adding a picture to an animal form

1. From the desired animal form, click **Picture**
2. Select the desired picture on your hard disk
3. Click **OK**

NOTE This functionality is exclusive to the software **Animalx**.

Adding one or multiple documents to an animal form

1. From the desired animal form, click **Attachment** 

2. Click **Add**
3. Select the desired picture on your hard disk
4. Click **OK**

NOTE The attached documents can be various formats: Word, Excel, PDF, etc.

NOTE This functionality is exclusive to the software **Animalx**.

Printing an animal passport

1. From the desired animal form, click **Print** 

2. Select the desired printer for printing
3. Click **Print**

NOTE This functionality is exclusive to the software **Animalx**.

Consulting/Modifying an animal form to a customer form

1. From the desired animal form, select the tab **Animal**
2. Select, from the list of animals displayed, the desired animal
3. Click **Modify**
4. Complete the desired information
5. Click **Save** 

after completing the modifications, if need be

NOTE This functionality is exclusive to the software **Animalx**.

Making an appointment for an animal

1. From the desired animal form, select the tab **Animal**
2. Select, from the list of animals displayed, the desired animal
3. Click **Appointment**

REFERENCE *Grooming – Scheduling an appointment.*

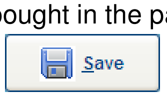
NOTE This functionality is exclusive to the software **Animalx**.

Consulting the follow-up of the programs of fidelity and courtesy

1. 1. From the desired customer form, select the tab **Courtesy-Fidelity**
2. 2. Consult the desired information

NOTE The courtesy reminder is automatically generated by the invoicing system.

Modifying the content of the programs of fidelity and courtesy

1. From the desired customer form, select the tab **Courtesy-Fidelity**
2. Click on the column name to modify (the field will become yellow)
3. Modify the desired information: Renewal date (**date recall**), number of days between the reminder (Day), the quantities bought in the past (**Qty**)
4. Click **Save** 

after completing the desired modifications, if need be

NOTE The modification of the **date** of **reminder** allows **managing exception cases** and not the sequence of renewal. In case of a modification of the reminder date, the system will prioritize the date entered to manage the renewal of the purchase. The modified date of reminder will be used to generate the courtesy report.

NOTE The modification of the number of **days** allows managing the **sequence of renewal**. In case of a modification of the number of days, the system will reset the modified sequence for the one registered to the customer form during the next invoice.

NOTE The **quantity** modification allows adjusting the quantity bought during the starting up of a program of courtesy following the first invoicing.

Consulting the history of the purchase orders

1. From the desired customer form, select the tab **Orders - History**
2. Consult the desired information

Modifying the history of the purchase orders

1. From the desired customer form, select the tab **Orders - History**
2. Select, among the displayed purchase orders, the desired purchase order
3. Click **Modify**

REFERENCE *Folder – Order/Quotation.*

Printing a purchase order

1. From the desired customer form, select the tab **Orders - History**
2. Select, among the displayed purchase orders, the desired purchase order
3. Click **Print**
4. Click **Print**

Creating a new purchase order

1. From the desired customer form, select the tab **Orders - History**
2. Click **Orders**

REFERENCE *Module – Order.*

Consulting the history of invoices

1. From the desired customer form, select the tab **Invoice - History**
2. Consult the desired information

Reaching the history of invoices

1. From the desired customer form, select the tab **Invoice - History**
2. Select, among the displayed invoices, the desired invoice
3. Click **Reach**

REFERENCE *Module – Invoices.*

Printing a completed invoice

1. From the desired customer form, select the tab **Invoice - History**
2. Select, among the displayed invoices, the desired invoice
3. Click **Print**

4. Select the desired printer to print
5. Click **Print**

Creating a new invoice

1. From the desired customer form, select the tab **Invoice - History**
2. Click **Invoices**

REFERENCE *Module – Invoices.*

Creating a new invoice with a completed invoice

1. From the desired customer form, select the tab **Invoice - History**
2. Select, among the displayed invoices, the desired invoice
3. Click **Reactivate**

REFERENCE *Module – Invoices.*

Deactivating a specific customer form

1. From the desired customer form, click on the Status button (Active/Inactive)
2. Click **Save** 

after completing the desired modifications, if need be

NOTE Any new created customer form will automatically be defined as being active, and this, even if the Active status button is not marked by the user. The deactivation of a customer form removes it from the searching tools while keeping its history not to falsify the data of the administrative reports.