



BEST PRACTICES
NEW CUSTOMER SETUP

11/2020

Table of Contents

Introduction	2
Setting Up a New Customer	3
#1 Enter Customer Details	3
#2. Add Routing Information	7
#3. Add Items to Pricing	9
#4. Create an Install Ticket / Invoice	9
#5. Preferred Delivery Method	12
Customer Card – tabs explained	13
Detail	13
Activity	14
Additional Info.....	15
Additional Contacts.....	16
Equipment.....	16
Routes	17
Notes	17
Attachments.....	18
Pricing.....	19
Portal.....	19
Transactions	20
Marketing.....	21
Managing Preferred Send Method in QuickBooks.....	22
Monitoring Terms in QuickBooks	26

RSO – NEW CUSTOMER SETUP

Introduction

RouteStar Online (RSO) can be used to setup customer accounts directly. Benefits of setting up accounts direct in RSO are:

1. Customers are available immediately to complete the setup of routing and pricing – no need to wait for a QuickBooks Sync.
2. Customer address format is typically more accurate, as it leverages Google maps.
3. Billing and remittance are more accurate, due to the address being formatted perfectly for QuickBooks.

Customer Setup tips:

1. Customer names need to be unique from an existing customer - *or* vendor perspective
2. Add a Suffix to your customer name, to make it unique and help distinguish it from other customers with the same name – be consistent
3. Inactive customers with the same name will also cause a setup issue – check QB first?
4. Only Inactivate Customers in QuickBooks – never delete a customer (unless it has never been transacted against)

Customers are accessed from the Menu structure in RSO, “Customers” Sub menu Items include:

- Customer Entry – entry screen for the beginning of setting up a new customer
- Customer List – an exportable grid or list that displays the details of the customers
- Customer Map – Graphical Representation of your customer base
- Memorized Txns - Not currently Leveraged
- Equipment List – List to review Equipment Deployed to the field
- Additional Info – List to review Additional Settings in 1 place
- Portal Access – Not currently Leveraged

Basic Elements of setting up a new Customer is:

1. Create customer
2. Add Routing
3. Add Pricing
4. Create Install Invoice

Installation Invoices – why:

The reasons for setting up separate installation invoices are numerous:

- Allows the work to be performed by a separate route / employee
- Allows for reporting in QuickBooks, running reports for installations
- Separate install line items allow the ability to recognize a separate transaction which took place
- Installation invoices are quite different than a normal invoice (different line items at different prices)

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Setting Up a New Customer

#1 Enter Customer Details

Login to RSO with your user credentials and select **Customers, Customer Entry**, you will see this screen (looks identical to the Lead Entry screen):

RouteStar qb 5 5 ? admin

MENU

- Dashboard
- Customers
 - Customer Entry
 - Customer List
 - Customer Map
 - Memorized Txns

Customer Entry / Home / Customer Entry

Parent: Choose..

Customer/Lead Name: Customer/Lead Name

Company: Company

First Name: First Name

Last Name: Last Name

Enter the Customer name and contact info:

Customer Entry / Home / Customer Entry

Parent: Choose..

Customer/Lead Name: Enviro Testing School - Location B

Company: Enviro Testing School

First Name: Michael

Last Name: Enviro

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Next, start typing the lead address in the **Search for Service Address**. With Locations services allowed on your browser, the address should start to auto-fill:

Search for Service Address:

- 200 Main Street** Pineville, NC, USA
- 200 Main Street** Fort Mill, SC, USA
- 200 West Main Avenue** Gastonia, NC, USA
- 200 Main Street Southwest** Gainesville, GA, USA
- 200 East South Main Street** Waxhaw, NC, USA

powered by Google

Most locations will have the same **Bill to Address**, so just select the checkbox:

Billing Address:

Same as Service Address

Your completed address(es) will be filled in with the correct QuickBooks formatting that is required for a good Geo-Coding:

200 Main St

Fort Mill SC 29715

Billing Address:

Same as Service Address

Enviro Testing School - Location B

200 Main St

Line 3

Fort Mill SC 29715

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Complete **ALL** the fields below marked in yellow (not marked is optional):

Phone: 513-652-371	Alt Phone: 513-652-3737	Fax: Fax	
Email: mhanschke@gmail.com	Is this a customer or a lead? Customer	Preferred Contact Method: SMS	
Sales Rep: TN	Tax Code: Tax	Sales Tax Rate: Carson City, NV (7.6000%)	Customer Type: Weekly
Terms: Net 30	Grouping: SE	Price Grouping: Choose..	

NOTES: This is the minimum information required:

Alt Phone – good to have;

Fax – rarely used;

Preferred Contact Method – how you want tasks to communicate with your customer;


Sales Rep – for tracking and commission purposes in QuickBooks;


Grouping – If you want to track your customers by geography, size, type, etc.;

Price Grouping – not currently used.

- After the Customer is created, it will sync to QuickBooks in under 30 minutes

We now have all the information required to create the Customer (or Clear to start over). Press **Create Customer/Lead**.

 Clear/Reset Form

 Create Customer/Lead

*Note: Best practice is that any customer details that need to be **updated or changed**, should be done on the QuickBooks side, after the record has sync'd over.*

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The screen will refresh, and you will be presented with your New Customer:

Customer Detail / [Home](#) / [Customers](#) / Customer Detail

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task + Invoice + Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment Routes Notes Attachments Pricing Portal Transactions Marketing

Account #
Account Number

Balance
\$

Parent
Parent Name

Company
Enviro Testing School

Customer/Job
Enviro Testing School - Location B

Contact
Michael Enviro

This Customer will be visible in the **Customer List** (the list can be exported to Excel and the grid can also be sorted and filtered like all normal RSO grids):

Customers / [Home](#) / Customers

Menu [Refresh] [Refresh]

Search Customers

Last

	Customer ↑	Address	City	State	Zip	Phone	Email	Active	Paperless	Grouping	Created
1	Enviro Testing School - Location A	100 Main St	Fort Mill	SC	29715	513-652-3710	mhanschke@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>		10/19/2020 8:33 AM
2	Enviro Testing School - Location B	200 Main St	Fort Mill	SC	29715	513-652-371	mhanschke@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SE	10/23/2020 1:52 PM

RSO – NEW CUSTOMER SETUP

#2. Add Routing Information

If you know the Route information for the customer, you may proceed to the **Routes** tab:

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task + Invoice + Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment **Routes** Notes Attachments Pricing Portal Transactions Marketing

Alternatively, you may use the **Routes / Map New Stop** feature:

RouteStar Search Everything... qb 5 5 ? admin

Map Distance / Home / Map Distance

Data View Map View

Map Distance to a New Route Stop

Select a customer and press get distance and then simply click the arrow to add the selected customer to the route schedule either before or after.

Search Customers

AssignedTo	Freq	Date	Customer	Day	Stop	Distance (mi.)	Before/After
No data found matching your selections.							

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To use the Map New Stop feature, **Enter** the customer name and select **Get Distance** and then use the **arrows** to insert before or after another stop:

Map Distance / Home / Map Distance

Data View | Map View

Map Distance to a New Route Stop

Select a customer and press get distance and then simply click the arrow to add the selected customer to the route schedule either before or after.

Enviro Testing School - Location A Get Distance

AssignedTo	Freq	Date	Customer	Day	Stop	Distance (mi.)	Before/After
CORP5	weekly	10/12/2020	mm2	Monday	2	5.598349	↶ ↷
CORP5	weekly	10/14/2020	MICHAEL COD	Wednesday	1	6.046129	↶ ↷
CORP5	weekly	10/15/2020	MH-17	Thursday	1	6.046129	↶ ↷

Enter the routing information and the date of the service items. Be sure to add amazing Route Notes !

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task + Invoice + Quote Geocode Delete Close

Details | Activity | Additional Info | Additional Contacts | Equipment | **Routes** | Notes | Attachments | Pricing | Portal | Transactions | Marketing

Menu | Refresh / Clear Filters Search List

Frequency	Route	Date	Day	Assigned To	Assigned Date	Stop	Suspended	Notes	Actions
1 weekly	CORP2	11/01/2020	Sunday	CORP2	11/01/2020		<input type="checkbox"/>	2RR/2AF/2FS - check all paper dispensers an stock as required	
2 Monthly-28	CORP5	11/08/2020	Sunday	CORP5	11/08/2020		<input type="checkbox"/>	2RR scrub, arrive before 7AM (water is in 1st stall)	
3 Choose..							<input type="checkbox"/>		

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#3. Add Items to Pricing

Select Items to be added to the **Pricing** tab:

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task + Invoice + Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment Routes Notes Attachments **Pricing** Portal Transactions Marketing

Menu [Icons]

Last

	Item	Description	Cost	Sales Price	Default Qty	Fill Cap	Frequency	Class	Department	Sort	Last Date
1	Services:6006-Trip Charges	Trip Charge	\$0.000	\$4.000	1		weekly	Choose..	Choose..		
2	Services:7001-Sani Service Weekly	Sani Service - Weekly	\$0.000	\$38.000	1		weekly	Choose..	Choose..		
3	Services:8001-Sani Scrub E4W	Sani Scrub - Every four weeks	\$0.000	\$158.000			Monthly-28	Choose..	Choose..		
4	Choose..						Choose..	Choose..	Choose..		

Note: Frequency is used to generate invoices by frequency; Default Qty is used to add a default quantity to an invoice.

#4. Create an Install Ticket / Invoice

Select the **+ Invoice** button to create an Installation invoice:

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task **+ Invoice** + Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment Routes Notes Attachments Pricing Portal Transactions Marketing

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Select a **Date** (Date for the install) and the **Assigned to** (Route for the install), **Save and Continue** →

Choose the Install **Line Items** and press the + sign to add them to the install ticket (or just enter the items as you would directly in the Item Line field):

*Note: This is the old manual ticket generation process. Do not select **Load Pricing Group**, as those prices are used for the weekly invoices. What we are building here is a **One-Time Invoice** (no need to add to the route schedule either !)*

*After you have added all your items, add some detailed **Service Notes** on the bottom of the invoice , to give clear instructions for the installation:*

RSO – NEW CUSTOMER SETUP

#5. Preferred Delivery Method

This step can be done on a weekly basis but must be completed before Corporate sends monthly statements – at a minimum.

Edit Customer

CUSTOMER NAME **Enviro Testing School - Location A**

CURRENT BALANCE **0.00** How do I adjust the current balance?

Address Info

ACCOUNT NO.

CREDIT LIMIT

Payment Settings

PAYMENT TERMS **Net 30**

PRICE LEVEL ?

Sales Tax Settings

PREFERRED DELIVERY METHOD **None**

Additional Info

PREFERRED PAYMENT METHOD **E-mail**

Mail

None

ONLINE PAYMENTS

Let this customer pay you by:

Credit Card

Bank Transfer (ACH)

Job Info

CREDIT CARD INFO

CREDIT CARD NO.

EXP. DATE /

NAME ON CARD

ADDRESS

ZIP / POSTAL CODE

Can I save the Card Security Code?

Customer is inactive

OK

Note: refer to the **Managing Preferred Delivery Method in QuickBooks** section in this document for more detailed instructions.

RSO – NEW CUSTOMER SETUP

Activity

Once you start to generate invoices, making routing changes, post invoices, advance schedules, etc., you will see that activity on this tab:

Details	Activity	Additional Info	Additional Contacts	Equipment	Routes	Notes	Attachments	Pricing	Portal	Transactions	Marketing																																																																																				
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RSO – NEW CUSTOMER SETUP

Additional Info

This is used for adding additional information to the Customer Account:

Details	Activity	Additional Info	Additional Contacts	Equipment	Routes	Notes	Attachments	Pricing	Portal	Transactions	Marketing
Customer Additional Info ⚙️											
Inside Sales:			Empty								
Route Maint. Plan:			Empty								
Default Delivery Method:			Email								
Map Book:			Empty								
Map Page:			Empty								
Blanket PO Number:			1234567890								
Tax Key No:			Empty								
Permit Number:			Empty								
County:			Empty								
Commission:			Empty								
System Type:			Empty								
Last Service Date:			Empty								
Driving Directions:			Empty								

For the most part, only 2 fields are really leveraged:

Default Delivery Method: Used to create an invoice in the send Form (Print or Email) Queues QuickBooks when posting an invoice.

Blanket PO Number: Used to display a blanket PO# on a field facing invoice and also post that # back to QB on the Invoice.

Most other fields are not currently used.

RSO – NEW CUSTOMER SETUP

Additional Contacts

Used to capture additional contact information in RSO only (does not sync to QB). Use the + sign to add a contact:

Equipment

We have the ability to track equipment at a customer location, out side of the normal dispensers added to installation invoices. Just add equipment / dispenser line items as you would normally do to customer pricing.

Details	Activity	Additional Info	Additional Contacts	Equipment	Routes	Notes	Attachments	Pricing	Portal	Transactions	Marketing																																				
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> Menu Filter Refresh </div> <div> <input type="text" value="Search List"/> </div> </div> <div style="margin-top: 5px;"> Last </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Item</th> <th>DateAdded</th> <th>AddedBy</th> <th>Serial Number</th> <th>In Service Date</th> <th>Warranty End D</th> <th>Warranty Len</th> <th>On Service Contr</th> <th>Mf</th> <th>Equipment Notes</th> <th>Quantity</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>1 D1-DISPENSERS:AIR-ODY-BLK - Odyssey</td> <td>2020-10-23 14:58:54</td> <td>admin</td> <td>N/A</td> <td>10/23/2020</td> <td></td> <td></td> <td></td> <td></td> <td>refurbished</td> <td>10</td> <td></td> </tr> <tr> <td>2 Choose..</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>												Item	DateAdded	AddedBy	Serial Number	In Service Date	Warranty End D	Warranty Len	On Service Contr	Mf	Equipment Notes	Quantity	Actions	1 D1-DISPENSERS:AIR-ODY-BLK - Odyssey	2020-10-23 14:58:54	admin	N/A	10/23/2020					refurbished	10		2 Choose..											
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2 Choose..																																															

These records are exportable to Excel

RSO – NEW CUSTOMER SETUP

Routes

This tab allows the entry of Routing to a customer (may also be done on the Route Schedule):

Details	Activity	Additional Info	Additional Contacts	Equipment	Routes	Notes	Attachments	Pricing	Portal	Transactions	Marketing
---------	----------	-----------------	---------------------	-----------	--------	-------	-------------	---------	--------	--------------	-----------

Menu
Refresh / Clear Filters

	Frequency	Route	Date	Day	Assigned To	Assigned Date	Stop	Suspended	Notes	Actions
1	weekly	CORP5	10/20/2020	Tuesday	CORP5	10/20/2020	6	<input type="checkbox"/>	2RR/2AF/2FS arrive by 7AM	
2	Choose..							<input type="checkbox"/>		

Make sure you have excellent Route Notes

Notes

Notes can be added to a customer record, to keep track of events related to the customer. Tasks Notes are also saved to this area. Simply select **+ Add Note:**

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task
+ Invoice
+ Quote
Geocode
Delete
Close

Details	Activity	Additional Info	Additional Contacts	Equipment	Routes	Notes	Attachments	Pricing	Portal	Transactions	Marketing
---------	----------	-----------------	---------------------	-----------	--------	-------	-------------	---------	--------	--------------	-----------

Menu
+ Add Note
Refresh / Clear Filters

	Created	Notes	User	Time Stamp	Category/Type	Task #	Specific Notes
1	User Entered	Chris, please make sure you follow up with this account. Looks like they are ready to sign up !	admin	11/03/2020 9:48:06 am	Follow Up On Quote		

RSO – NEW CUSTOMER SETUP

Attachments

This area can be used to save service contracts, pictures of the restrooms, correspondence, etc. Simply drag the attachment onto the **Drag & Drop Files** window:

The screenshot shows the 'Enviro Testing School - Location B' customer detail page. The 'Attachments' tab is active, and a modal dialog box is displayed in the center with a green checkmark icon and the text 'Success!! Attachment added Successfully'. Below the dialog, a table lists the attachments:

ID	Type	RefNumber	FileName	Notes	Group	AddedBy	DateAdded	Actions
1	Customer		WC1048-20201103095023.pdf	Service Contract	Choose..	admin	11/03/2020 9:50 AM	Download Remove
2	Customer		WC1048-20201103095229.jpg	Restroom Picture	Choose..	admin	11/03/2020 9:52 AM	Download Remove

Add **Notes** to the attachment:

ID	Type	RefNumber	FileName	Notes	Group	AddedBy	DateAdded	Actions
1	Customer		WC1048-20201103095023.pdf	Service Contract	Choose..	admin	11/03/2020 9:50 AM	Download Remove
2	Customer		WC1048-20201103095229.jpg	Restroom Picture	Choose..	admin	11/03/2020 9:52 AM	Download Remove

RSO – NEW CUSTOMER SETUP

Pricing

Add any items to the Pricing tab.

- Frequency can be leveraged to print invoices that only contain the line items that pertain to that frequency.
- Default Qty can be used to prefill quantities on Invoices (typically recurring service items).
- Use the Actions, red trash can to remove items.
- Use Sort, to order the line items on the invoice

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task + Invoice + Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment Routes Notes Attachments **Pricing** Portal Transactions Marketing

Menu [Refresh] [Refresh]

Search List

Last

	Item	Description	Cost	Sales Price	Default Qty	Fill Cap	Frequency	Class	Department	Sort	Last Date	Last Qty	Avg	Actions	Issue Qty	Conv. Qty
1	Services:6006-Trip Charges	Trip Charge	\$0.000	\$4.000	1		weekly	Choose..	Choose..			0		[Trash]		
2	Services:7001-Sani Service Weekly	Sani Service - Weekly	\$0.000	\$38.000	1		weekly	Choose..	Choose..			0		[Trash]		
3	Services:8001-Sani Scrub E4W	Sani Scrub - Every four weeks	\$0.000	\$158.000			Monthly-28	Choose..	Choose..			0		[Trash]		
4	Choose..						Choose..	Choose..	Choose..							

Portal

Currently not used, but we could allow of customers to view a portal, to show them their service history, next service, etc.

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

+ Task + Invoice + Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment Routes Notes Attachments Pricing **Portal** Transactions Marketing

Manage Access [Refresh] [Refresh]

Search List

Last

	User Name	Password	First Name	Last Name	Phone

RSO – NEW CUSTOMER SETUP

Transactions

A historical list of invoices and tasks that have been created by the system. A handy way to see and launch invoices, invoice status (posted or not), Total, Assigned To, etc. (launch invoices by clicking on the scroll wheel to open in a new tab).

Customer Detail / [Home](#) / [Customers](#) / Customer Detail ➔

Enviro Testing School - Location B

Created: 10/23/2020 1:52 PM Last Modified: 10/23/2020 1:52 PM

[+ Task](#)
[+ Invoice](#)
[+ Quote](#)
[Geocode](#)
[Delete](#)
[Close](#)

- Details
- Activity
- Additional Info
- Additional Contacts
- Equipment
- Routes
- Notes
- Attachments
- Pricing
- Portal
- Transactions
- Marketing

☰ Menu 🔍 🔄 Search List

🕒 Last

	Txn #	Type	Date	Status	AssignedTo	Total
1	CORP1149	Invoice	11/02/2020	N	CORP5	\$201
2	TW5281	Task	10/23/2020	N		\$0
3	TW5282	Task	10/23/2020	Y	Corp1	\$0

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Marketing

Purpose of this tab is to maintain the Decision Maker (DM) information for the account. The main details tab with customer contact name, email, phone number, is really a QuickBooks filed for tracking the Accounts Payable department contact information. That information is used by the Accounts Receivable collection team. The information used on this tab, will be leveraged for digital marketing activities.

Details	Activity	Additional Info	Additional Contacts	Equipment	Routes	Notes	Attachments	Pricing	Portal	Transactions	Marketing																								
<p>Decision Maker Information</p> <table border="0"> <tr> <td>DM Salutation</td> <td><input type="text"/></td> <td>DM Main Phone</td> <td><input type="text"/></td> </tr> <tr> <td>DM Full Name</td> <td><input type="text"/></td> <td>DM Mobile Phone</td> <td><input type="text"/></td> </tr> <tr> <td>DM Job Title</td> <td><input type="text"/></td> <td>DM Email</td> <td><input type="text"/></td> </tr> </table> <hr/> <p>Extended Marketing Information Coming Soon!</p> <table border="0"> <tr> <td>SIC</td> <td><input type="text"/></td> <td>NAICS Description</td> <td><input type="text"/></td> </tr> <tr> <td>SIC Description</td> <td><input type="text"/></td> <td>Business Vertical</td> <td><input type="text"/></td> </tr> <tr> <td>NAICS Code</td> <td><input type="text"/></td> <td>Lifestage Group</td> <td><input type="text" value="Choose.."/></td> </tr> </table>												DM Salutation	<input type="text"/>	DM Main Phone	<input type="text"/>	DM Full Name	<input type="text"/>	DM Mobile Phone	<input type="text"/>	DM Job Title	<input type="text"/>	DM Email	<input type="text"/>	SIC	<input type="text"/>	NAICS Description	<input type="text"/>	SIC Description	<input type="text"/>	Business Vertical	<input type="text"/>	NAICS Code	<input type="text"/>	Lifestage Group	<input type="text" value="Choose.."/>
DM Salutation	<input type="text"/>	DM Main Phone	<input type="text"/>																																
DM Full Name	<input type="text"/>	DM Mobile Phone	<input type="text"/>																																
DM Job Title	<input type="text"/>	DM Email	<input type="text"/>																																
SIC	<input type="text"/>	NAICS Description	<input type="text"/>																																
SIC Description	<input type="text"/>	Business Vertical	<input type="text"/>																																
NAICS Code	<input type="text"/>	Lifestage Group	<input type="text" value="Choose.."/>																																

Note: Future project will be to integrate additional customer metrics Standard Industrial Classification (SIC) and North American Industry Classification System (NAICS).

RSO – NEW CUSTOMER SETUP

Managing Preferred Send Method in QuickBooks

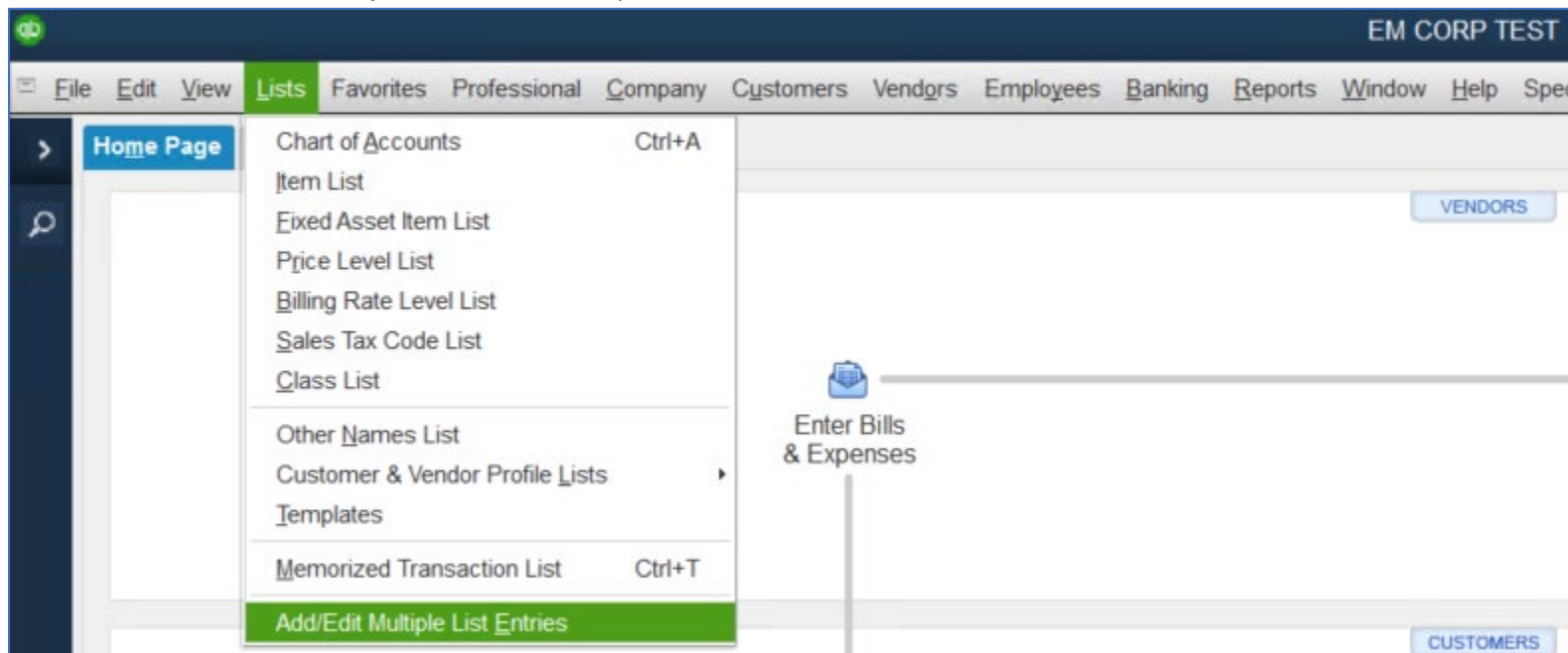
It is important that this field is maintained for all customers. The field may be jointly managed by yourself and the Corporate A/R team, as some consolidated billing accounts have specific criteria on how the receive statements. When in doubt, consult with your Corporate A/R representative.

This setting is used to determine how your customer will receive their monthly statement, or on-demand printed invoices from the A/R team

- None – default value, meaning they will not receive a statement (mainly used by Corporate Accounts)
Note: C.O.D. and Recurring Credit Card terms customers may also be set to none.
- Mail – they will receive a hardcopy emailed statement
- E-Mail - they will receive an emailed statement (they must have a valid email address on the customer card)

To Easily review customer Preferred Send Method, make the following adjustment to your List Entry:

#1. Select **Edit, Add/Edit Multiple List Entries** from your QuickBooks Menu:



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Make sure the List defaults to **Customers, Active Customers:**

1 Select a list. 2 Customize columns to display. 3 Paste from Excel or type to add to or modify your list.

List: **Customers** View: **Active Customers**

Currently Editing: _____

NAME	COMPANY NAME	TERMS	MR./MS./...	FIRST NAME
Enviro Testing School - Loc...	Enviro Testing School	Net 30		Michael
mm2	mm2	30 Days		mi
mm1	mm1	30 Days		Michael
TEST-18	TEST-18	COD		Michael
MH-LEAD-01	MH-LEAD-01	COD		Michael
MH-01s	MH-01s\Lot 1	COD		Michael
MH-31\Lot2	MH-31\Lot 2	Net 30	Mr	Michael

#2. On the far-right, select **Customize Columns:**

Customize Columns

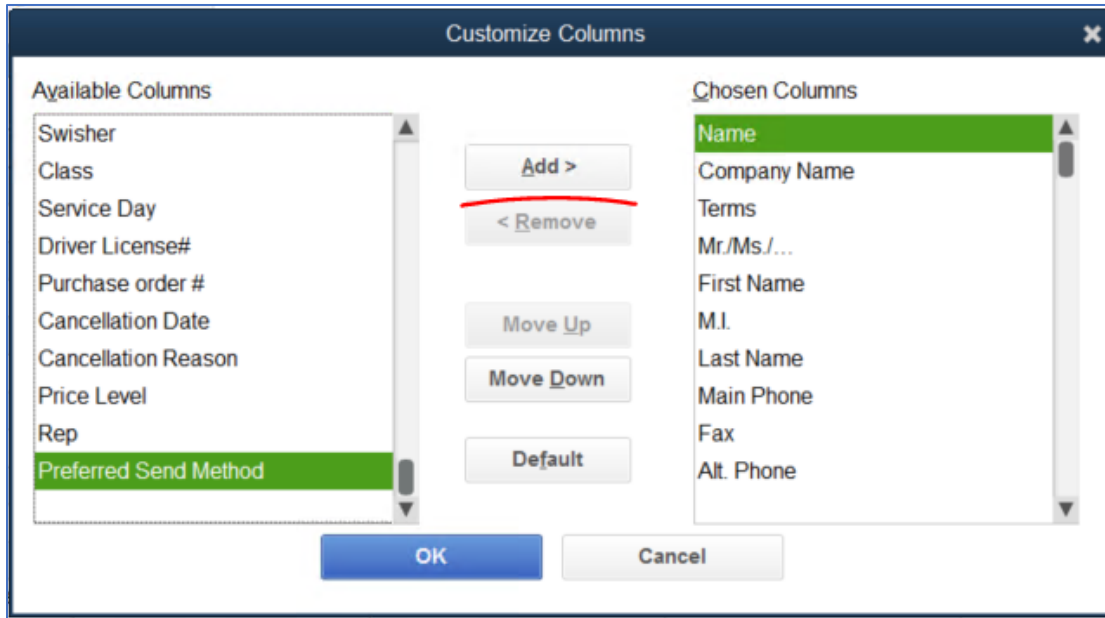
Find

Search within results

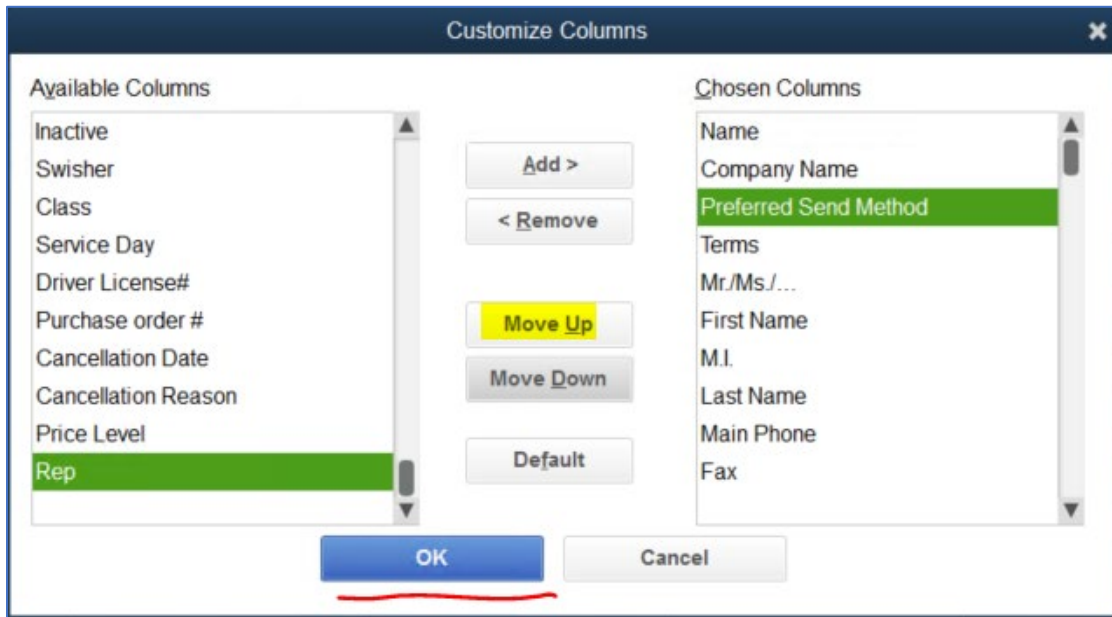
ALT. PHONE	E-MAIL
	mhanschke@gmail.com
	4
	mhanschke@enviro-ma
	mhanschke@xx.com

RSO – NEW CUSTOMER SETUP

#3. Scroll down and look for the **Preferred Send Method** column and Select **Add >**:



#4, Use the **Move Up** button to reposition the field as shown (or anywhere really) and select **OK**:



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#5. Use the Column **adjustment dividers** to adjust the column widths (notice Terms has also been *added* to this view!):

1 Select a list. 2 Customize columns to display. 3 Paste from Excel or type to add to or modify your list.

List: Customers View: Active Customers

Currently Editing:

NAME	COMPANY NAME	PREFERRED SEND METH.	TERMS	MR./MS./...	FIRST NAME
Enviro Testing School - Loc...	Enviro Testing School	None	Net 30		Michael
mm2	mm2	None	30 Days		mi
mm1	mm1	None	30 Days		Michael
TEST-18	TEST-18	None	COD		Michael

#6. It's best to leave this view sorted by **Name**, so that you can see like groups of customers, to help identify what Preferred Send Method is used):

NAME	COMPANY NAME	PREFERRED SEND METHOD	TERMS
Enviro Testing School - Location B	Enviro Testing School - Location B	E-mail	
Enviro Testing School - Location A	Enviro Testing School - Location A	None	Net 30
mm2	mm2	None	30 Days
mm1	mm1	E-mail	30 Days
TEST-18	TEST-18	Mail	COD
MH-LEAD-01	MH-LEAD-01	None	COD
MH-01s	MH-01s\Lot 1	none	COD

In this example, Location B had a delivery method of E-Mail, so I made Location A also be E-mail.

NAME	COMPANY NAME	PREFERRED SEND METHOD	TERMS
Enviro Testing School - Location B	Enviro Testing School - Location B	E-mail	
Enviro Testing School - Location A	Enviro Testing School - Location A	E-mail	Net 30

Note that you can also update the Terms from this screen as well (if you added it to the view, like Preferred Send Method)

Save Changes

Save Changes Close Help

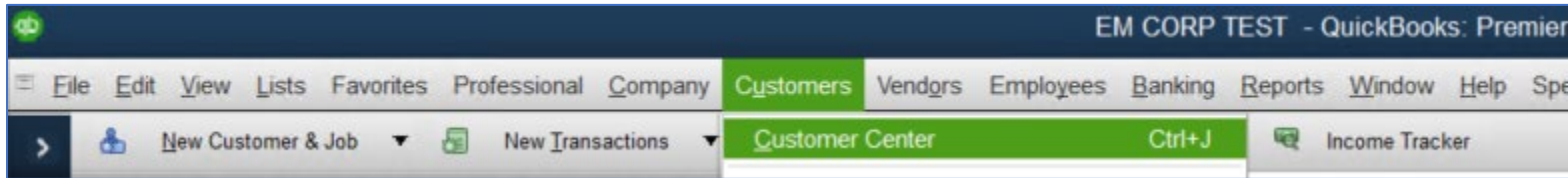
RSO – NEW CUSTOMER SETUP

Monitoring Terms in QuickBooks

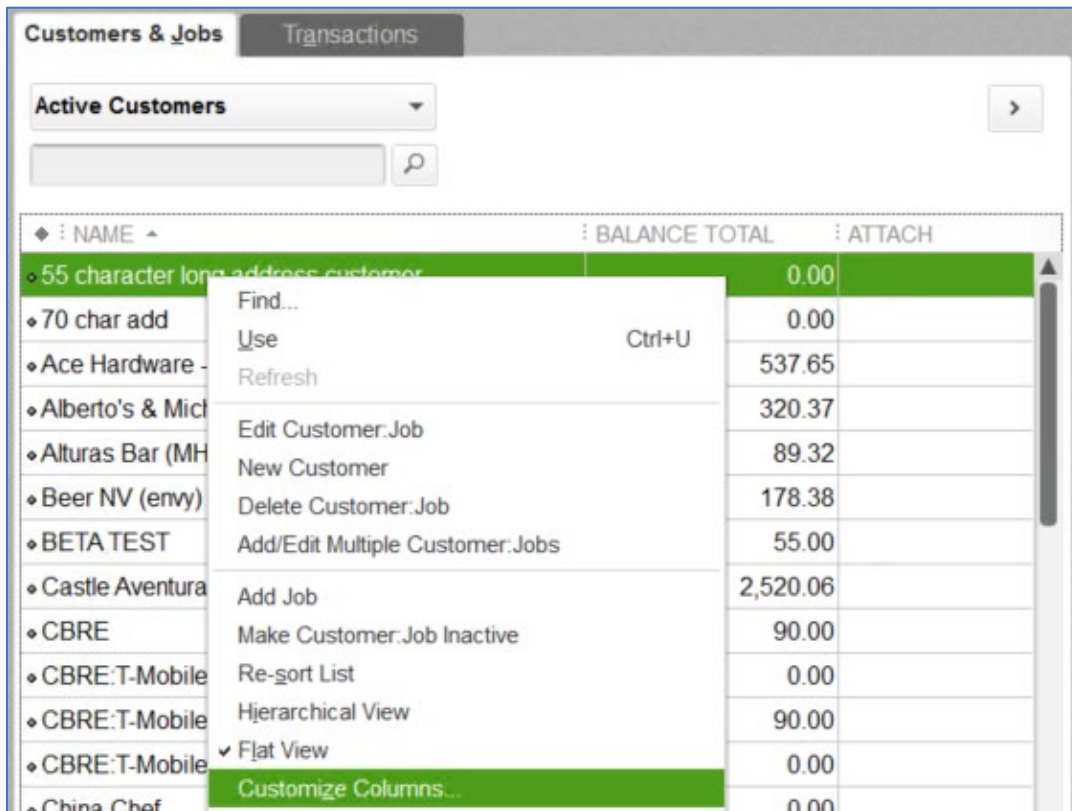
Payment Terms are critical in QuickBooks (in business in general) and drive aging reports and statement accuracy. A periodic review of Payment Terms is a good idea. Try to keep the number of Payment Terms to a minimum and try to not allow yourself to grant Terms more than 30 days, as this will affect your overall A/R collectability.

To Easily review customer Payment Terms, make the following adjustment to you Customer Center:

#1. Open the **Customer Center** under **Customers** in QuickBooks:

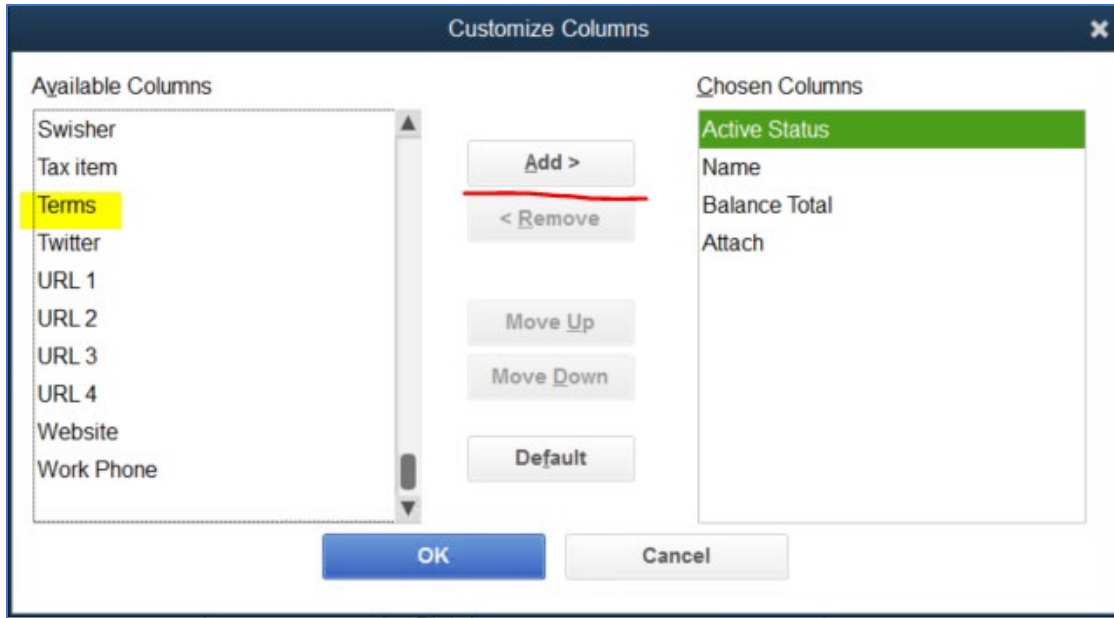


#2. **Right-click** any Name on the Customer List and select **Customize Columns**:

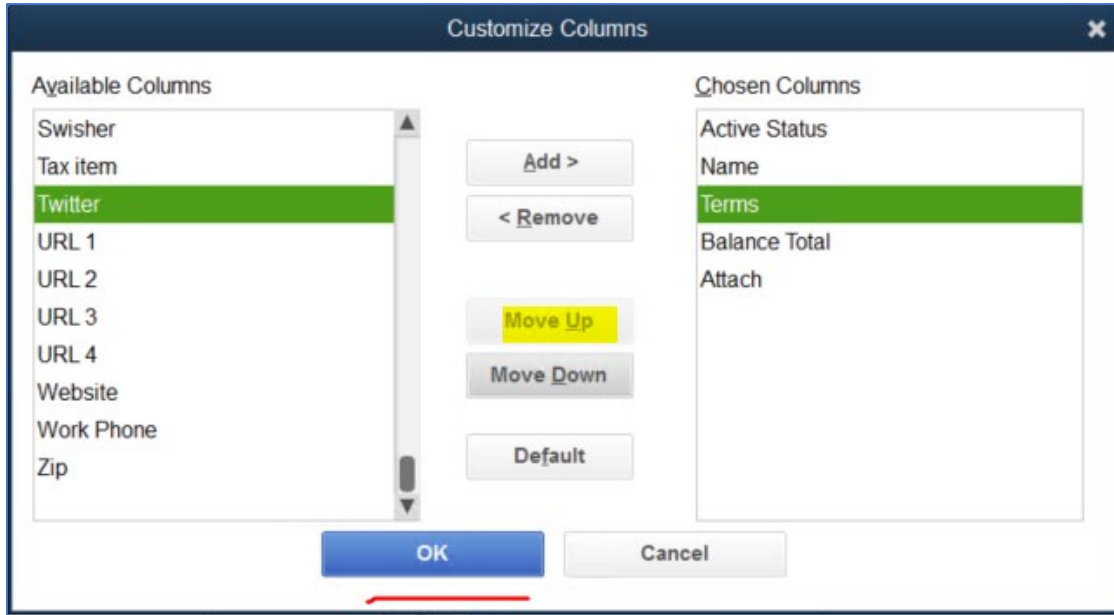


RSO – NEW CUSTOMER SETUP

#3. Scroll down and look for the **Terms** column and Select **Add >**:



#4. Use the **Move Up** button to reposition the field as shown (or anywhere really) and select **OK**:



RSO – NEW CUSTOMER SETUP

#5. Use the Column **adjustment dividers** to adjust the column widths:

NAME	TERMS	BALANCE T...	ATTACH
55 character long address customer		0.00	
70 char add		0.00	
Ace Hardware - Hansckeville	30 Days	537.65	
Alberto's & Michael's	Weekly COD	320.37	
Alturas Bar (MH)	30 Days	89.32	
Beer NV (envy)	30 Days	178.38	
BETA TEST	Net 30	55.00	
Castle Aventura		2,520.06	
CBRE		90.00	
CBRE:T-Mobile - Jefferson - CO	COD	0.00	
CBRE:T-Mobile - Schaefer - CLT	COD	90.00	

#6. Click on the column Headings to sort by Terms (this example show sorting by Terms, which shows missing Terms)

NAME	TERMS	BALANCE T...	ATTACH
55 character long address customer		0.00	
70 char add		0.00	
Castle Aventura		2,520.06	
CBRE		90.00	
CBRE:T-Mobile Store#MET- GSP		0.00	
Real Floors		0.00	
mm2	30 Days	0.00	
mm1	30 Days	0.00	

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#7. To adjust the Terms, **double-click** on the **customer name**, select **Payment Settings, Payment Terms** and select a method, press **OK**

CUSTOMER NAME **Castle Aventura**

CURRENT BALANCE 2,520.06 [How do I adjust the current balance?](#)

Address Info

Payment Settings

Sales Tax Settings

Additional Info

Job Info

ACCOUNT NO.

CREDIT LIMIT

PAYMENT TERMS

PREFERRED DELIVERY METHOD

PREFERRED PAYMENT METHOD

CREDIT CARD INFO

CREDIT CARD NO.

EXP. DATE

NAME ON CARD

ADDRESS

ZIP / POSTAL CODE

[Can I save the Card Security Code?](#)

PRICE LEVEL

ONLINE PAYMENTS

Let this customer pay you by:

Credit Card

Bank Transfer (ACH)

Customer is inactive