BEST PRACTICES
NEW CUSTOMER SETUP

11/2020

Table of Contents

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:

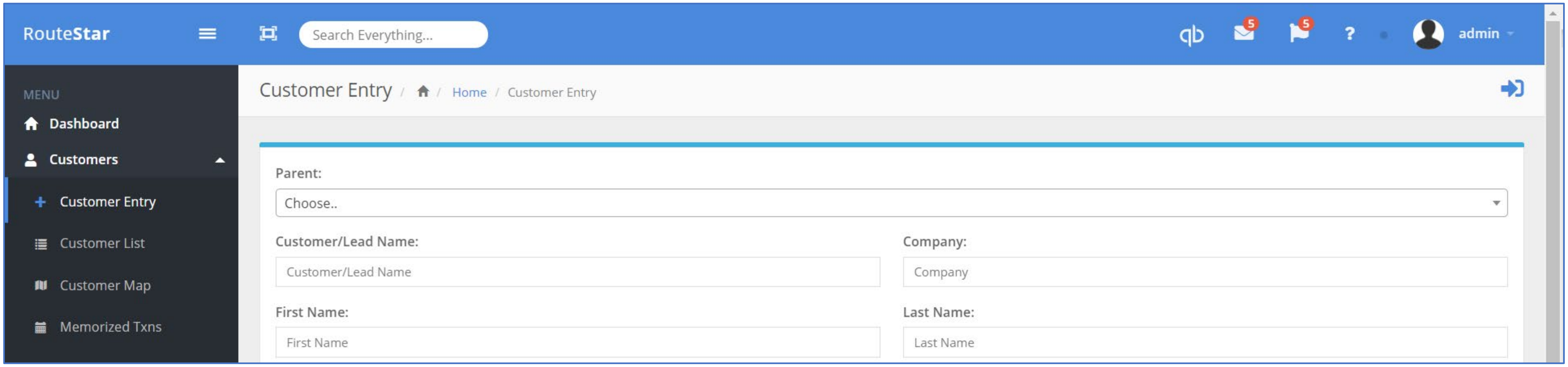
The reasons for setting up separate installation invoices are numerous:

- 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)

Setting Up a New Customer

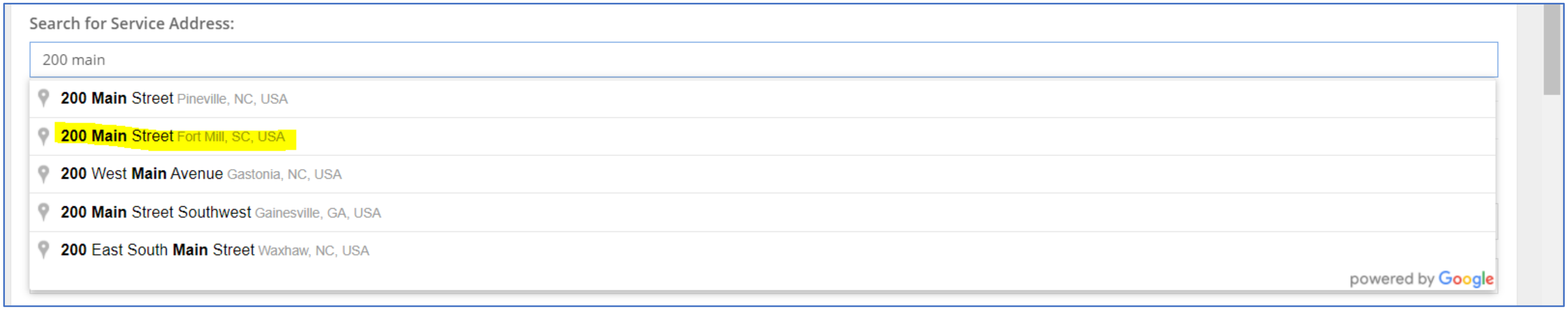
#1 Enter Customer Details

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

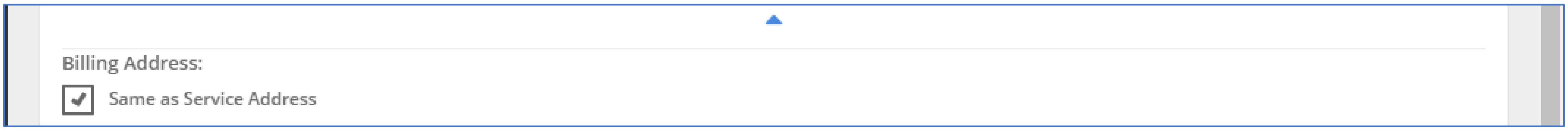


Enter the Customer name and contact Info:

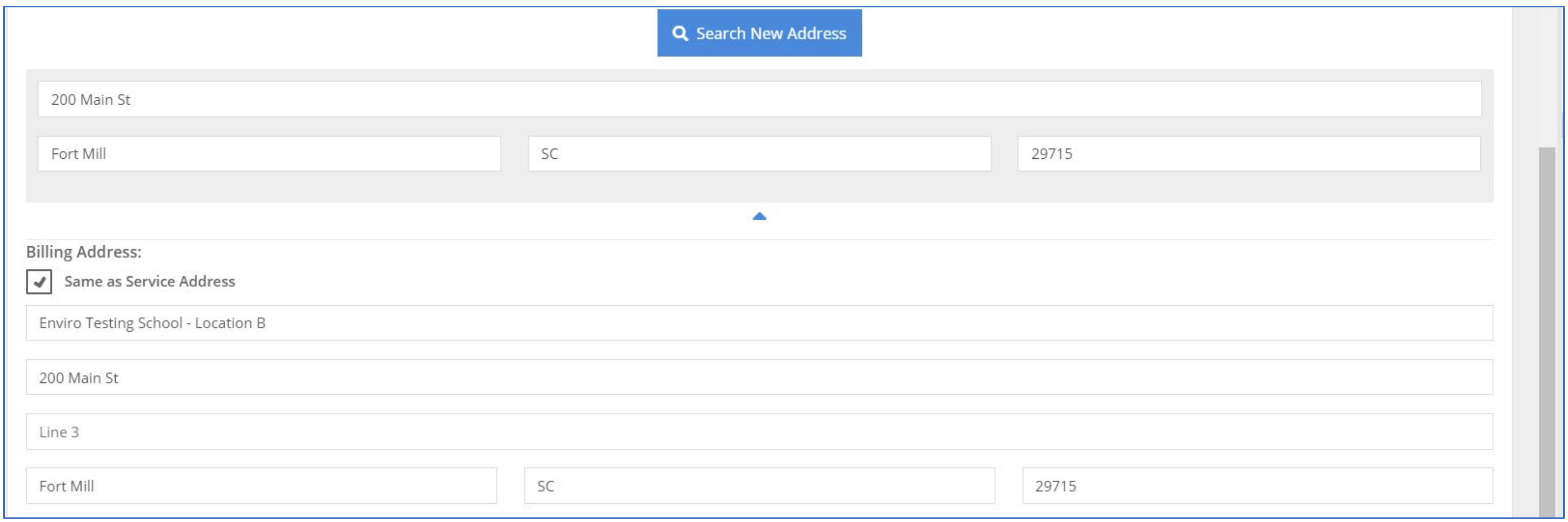
Next, start typing the lead address in the **Search for Service Address**. With Locations services allowed on your browser, the address should start to auto-fill:



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

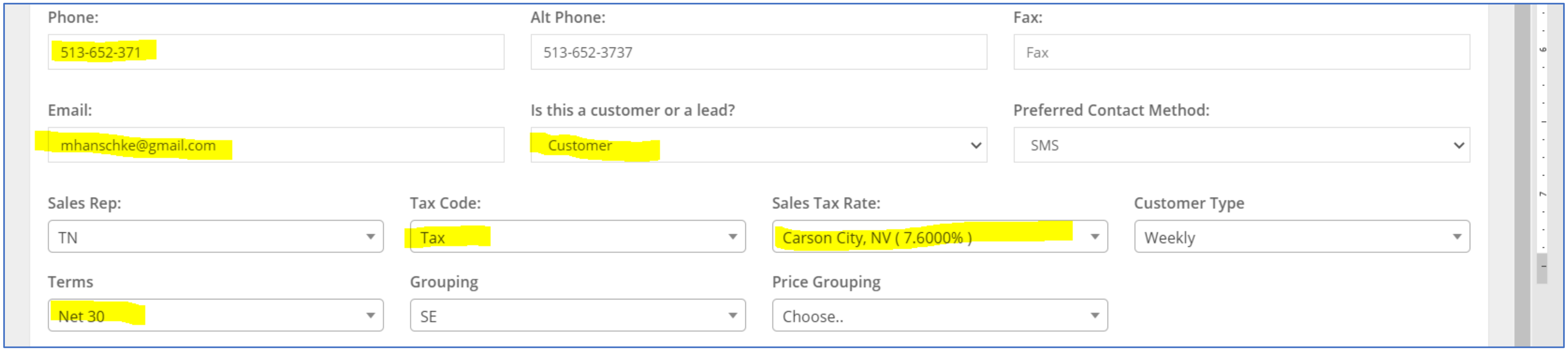


Your completed address(es) will be filled in with the correct QuickBooks formatting that is required for a good Geo-Coding:



RSO – NEW CUSTOMER SETUP

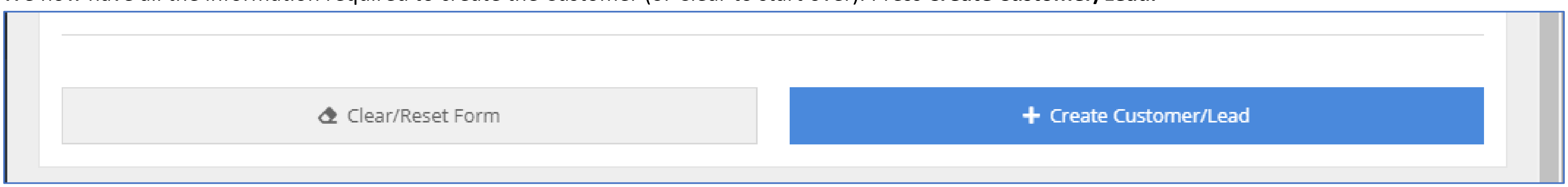
Complete **ALL** the fields below marked in yellow (not marked is optional):



NOTES: This is the minimum information required:
<u>Alt Phone</u> – good to have;
<u>Fax</u> – rarely used;
<u>Preferred Contact Method</u> – how you want tasks to communicate with your customer;
<u>Sales Rep</u> – for tracking and commission purposes in QuickBooks;
<u>Grouping</u> – If you want to track your customers by geography, size, type, etc.;
<u>Price Grouping</u> – not currently used.

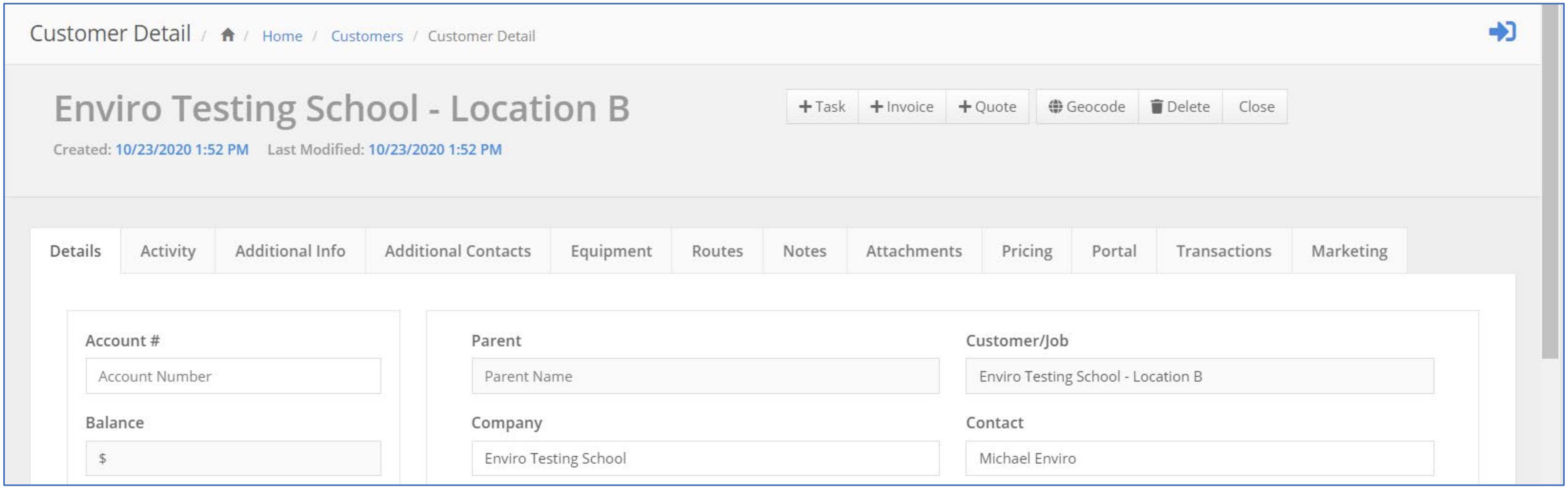
- After the Customer is created, it will sync to QuickBooks in under 30 minutes

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

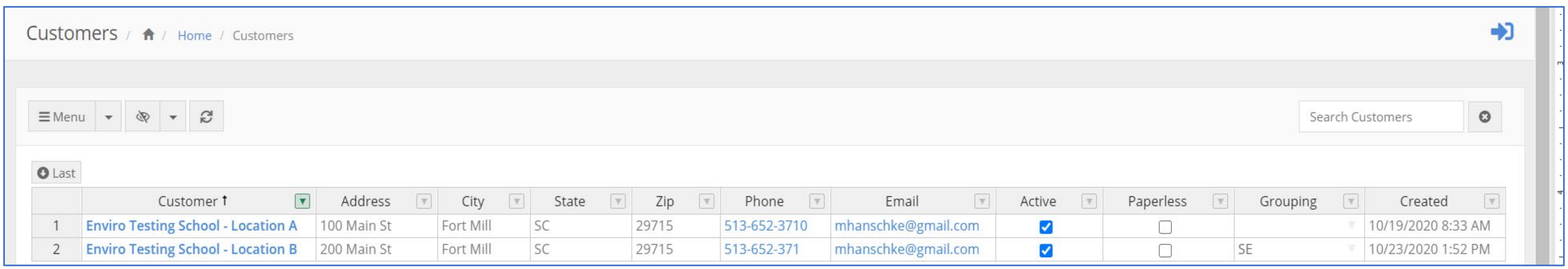


*<u>Note: Best practice is that any customer details that need to be **updated or changed**, should be done on the QuickBooks side, after the record has sync'd over.</u>*

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

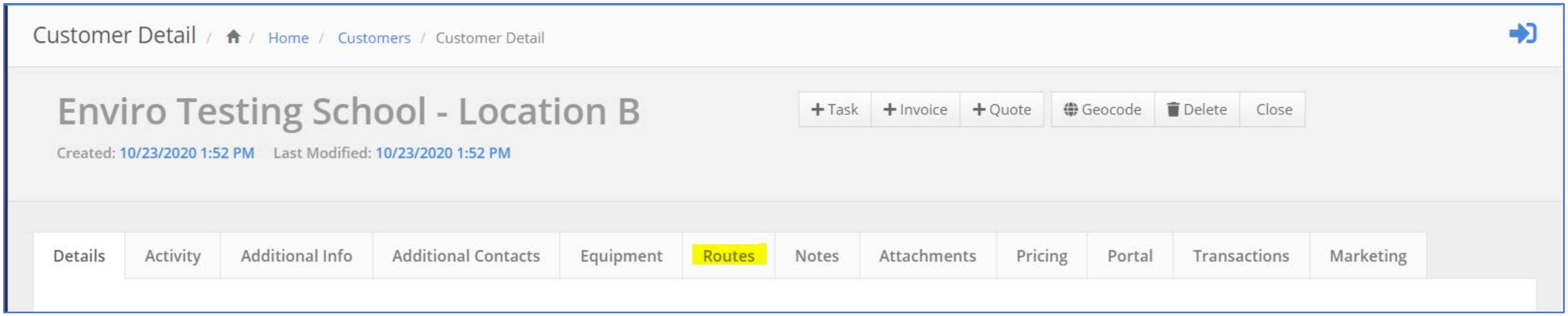


This Customer will be visible in the **Customer List** (the list can be exported to Excel and the grid can also be sorted and filtered like all normal RSO grids)**:**

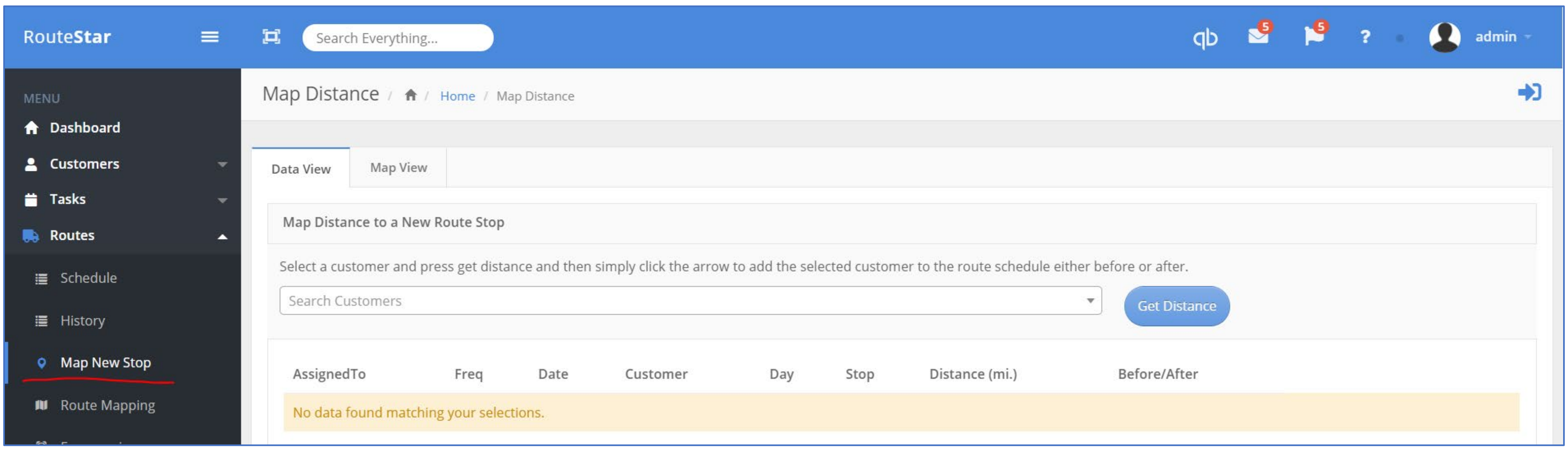


#2. Add Routing Information

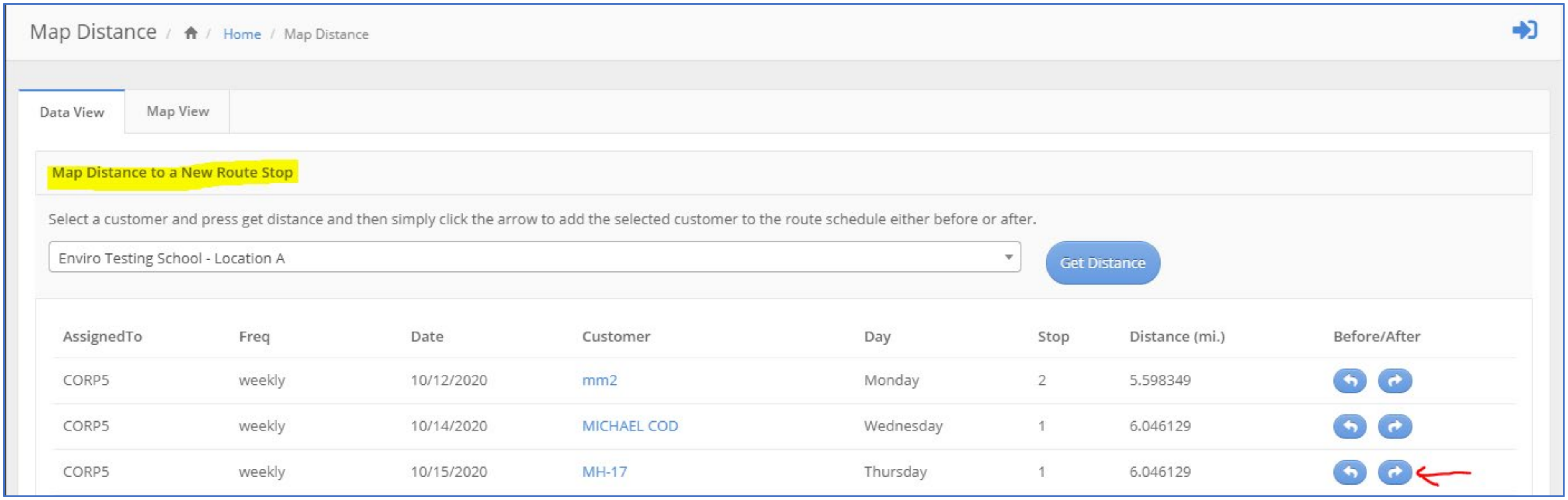
If you know the Route information for the customer, you may proceed to the **Routes** tab:



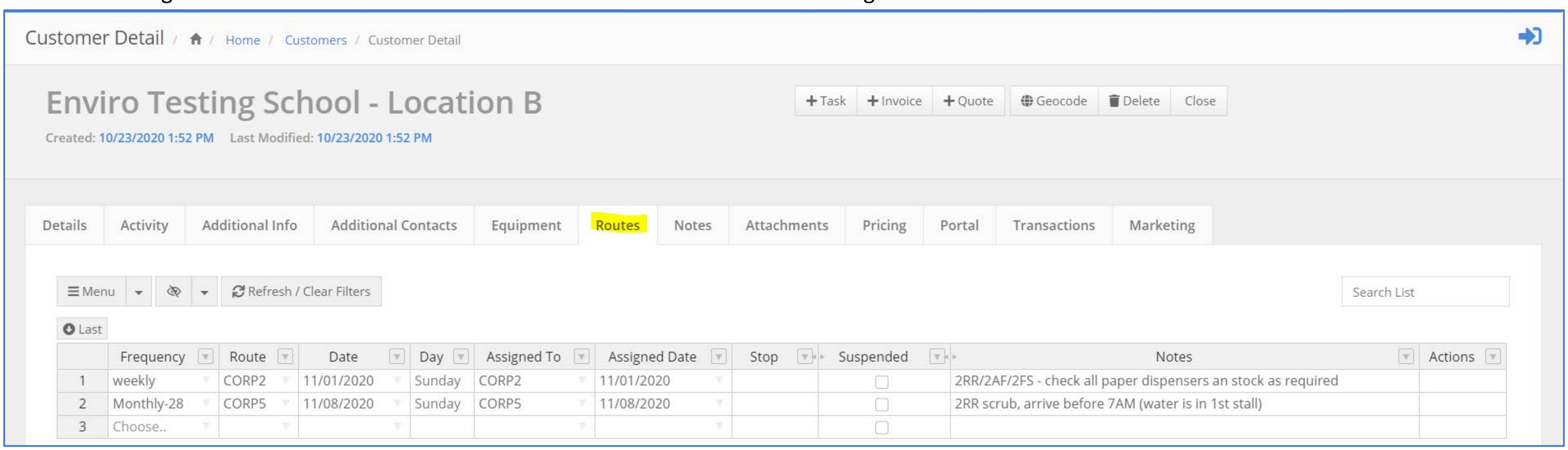
Alternatively, you may use the **Routes** / **Map New Stop** feature:



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:

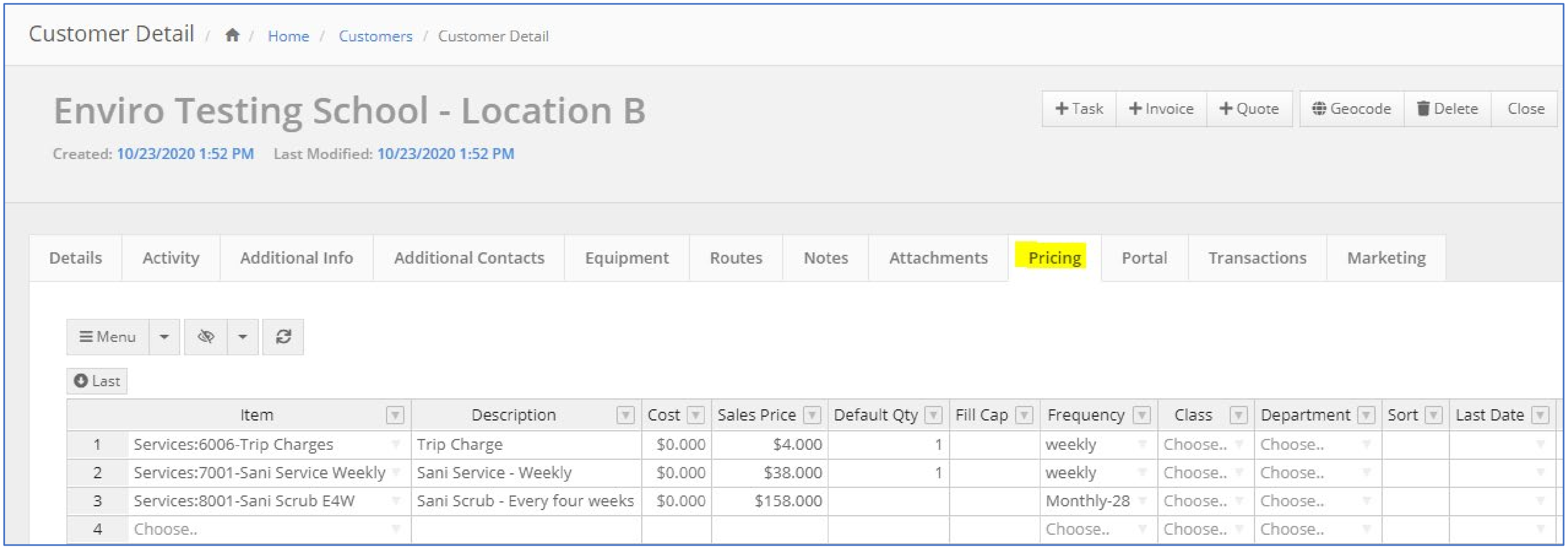


Enter the routing information and the date of the service items. Be sure to add amazing Route Notes !



#3. Add Items to Pricing

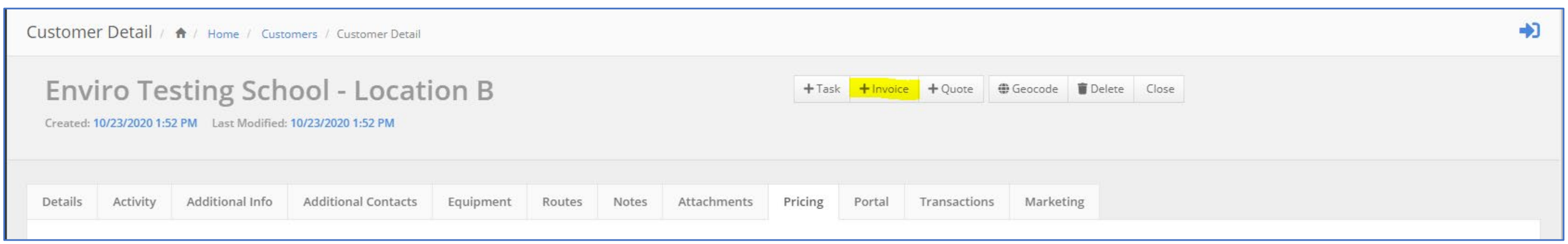
Select Items to be added to the **Pricing** tab:



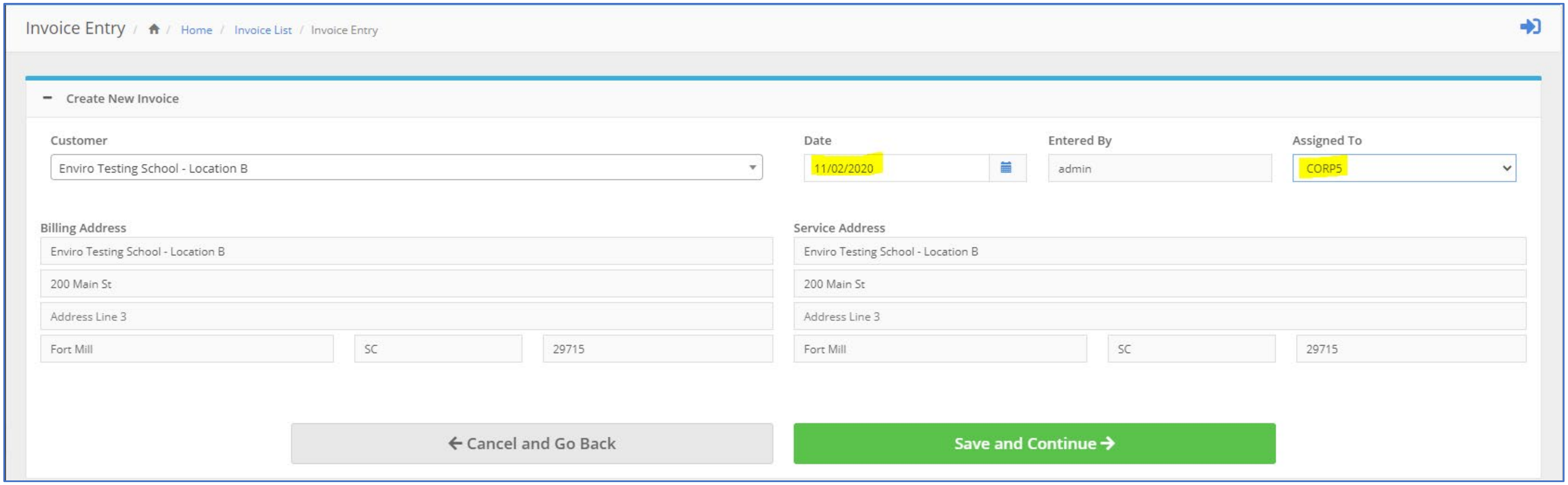
Note: Frequency is used to generate invoices by frequency; Default Qty is used to add a default quantity to an invoice.

#4. Create an Install Ticket / Invoice

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



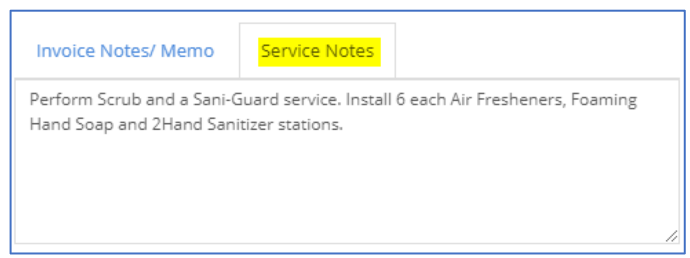
Select a **Date** (Date for the install) and the **Assigned to** (Route for the install), **Save and Continue →**



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 (<u>no need to add to the route schedule either !</u>)*

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:



You can now print the Invoice if needed (**Print / Double w/ Logo**). The invoice is already on the mobile side, waiting to be used during the installation.

Enviro-Master Services

Enviro-Master
PO Box 12350
Charlotte, NC 28220
Phone: 7049018317
Email: mhanschke@enviro-master.com

Invoice #:	CORP1149
Date:	11/02/2020
Route:	CORP5 (Michael - SCRUB)

Billing Address	Service Address
Enviro Testing School - Location B 200 Main St Fort Mill, SC 29715	Enviro Testing School - Location B 200 Main St Fort Mill, SC 29715

P.O. Number:		**Payment Terms:**		**Next Service:**	11/01/2020

Item	Qty	Rate	Total
6000-Sani Weekly Installs - Weekly Sani Installation	1.00	76.00	76.00
8000-Monthly Scrub Installs - Monthly Scrub Installation	1.00	125.00	125.00
5000-Dispenser Installs - Warranty Dispenser Installation	6.00	0.00	0.00
		Subtotal:	
		(0%):	
		Total:	

Signature:

Signed By:

Notes: Perform Scrub and a Sani-Guard service. Install 6 each Air Fresheners, Foaming Hand Soap and 2Hand Sanitizer stations.

You can now pay this invoice online by going to https://embeta.routestar.online/web/PayNow

Enviro-Master Services

Enviro-Master
PO Box 12350
Charlotte, NC 28220
Phone: 7049018317
Email: mhanschke@enviro-master.com

Invoice #:	CORP1149
Date:	11/02/2020
Route:	CORP5 (Michael - SCRUB)

Billing Address	Service Address
Enviro Testing School - Location B 200 Main St Fort Mill, SC 29715	Enviro Testing School - Location B 200 Main St Fort Mill, SC 29715

P.O. Number:		**Payment Terms:**		**Next Service:**	11/01/2020

Item	Qty	Rate	Amount
6000-Sani Weekly Installs - Weekly Sani Installation	1.00	76.00	76.00
8000-Monthly Scrub Installs - Monthly Scrub Installation	1.00	125.00	125.00
5000-Dispenser Installs - Warranty Dispenser Installation	6.00	0.00	0.00
		Subtotal:	
		(0%):	
		Total:	

Signature:

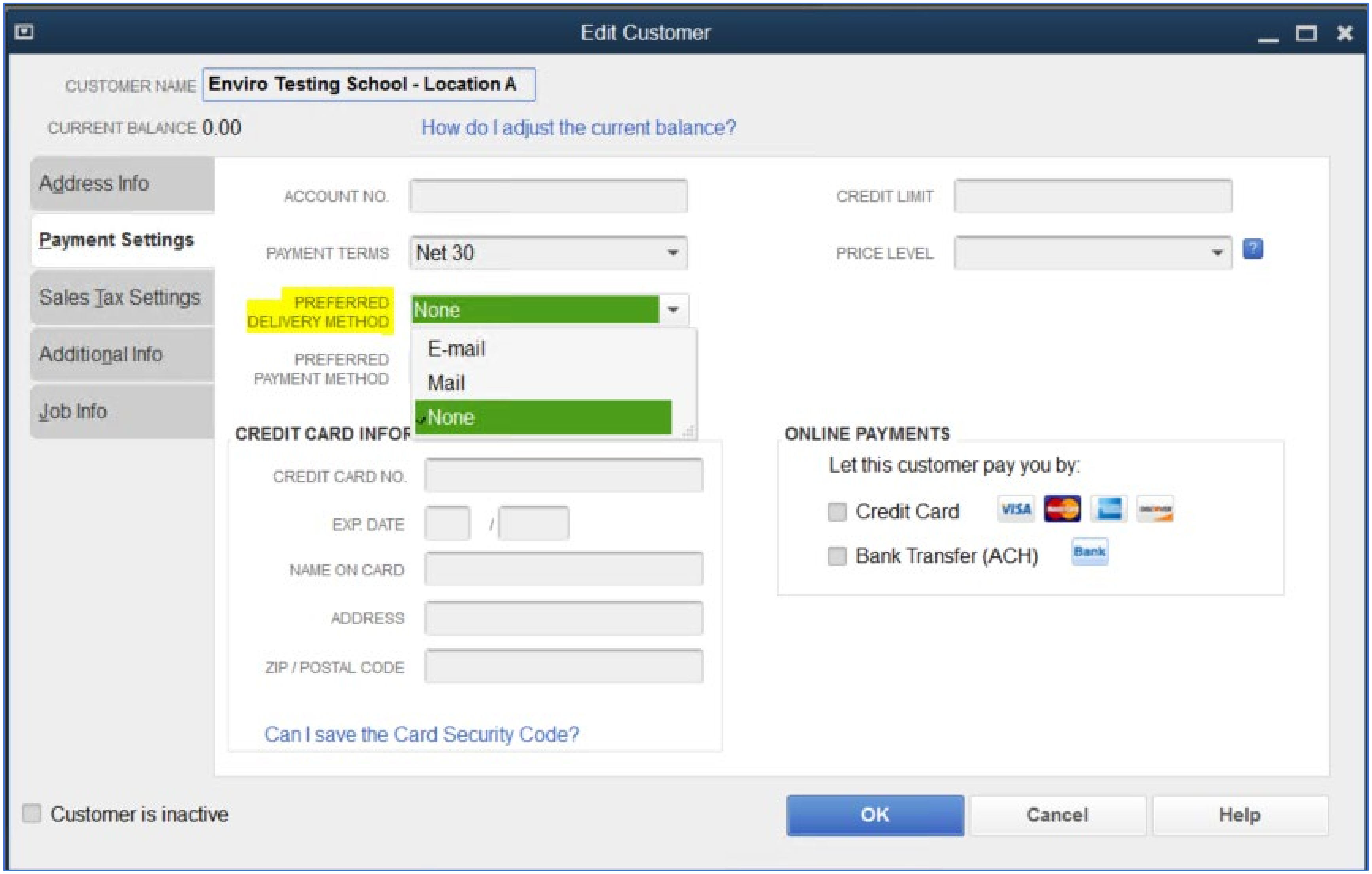
Signed By:

Notes:

You can now pay this invoice online by going to https://embeta.routestar.online/web/PayNow

#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.

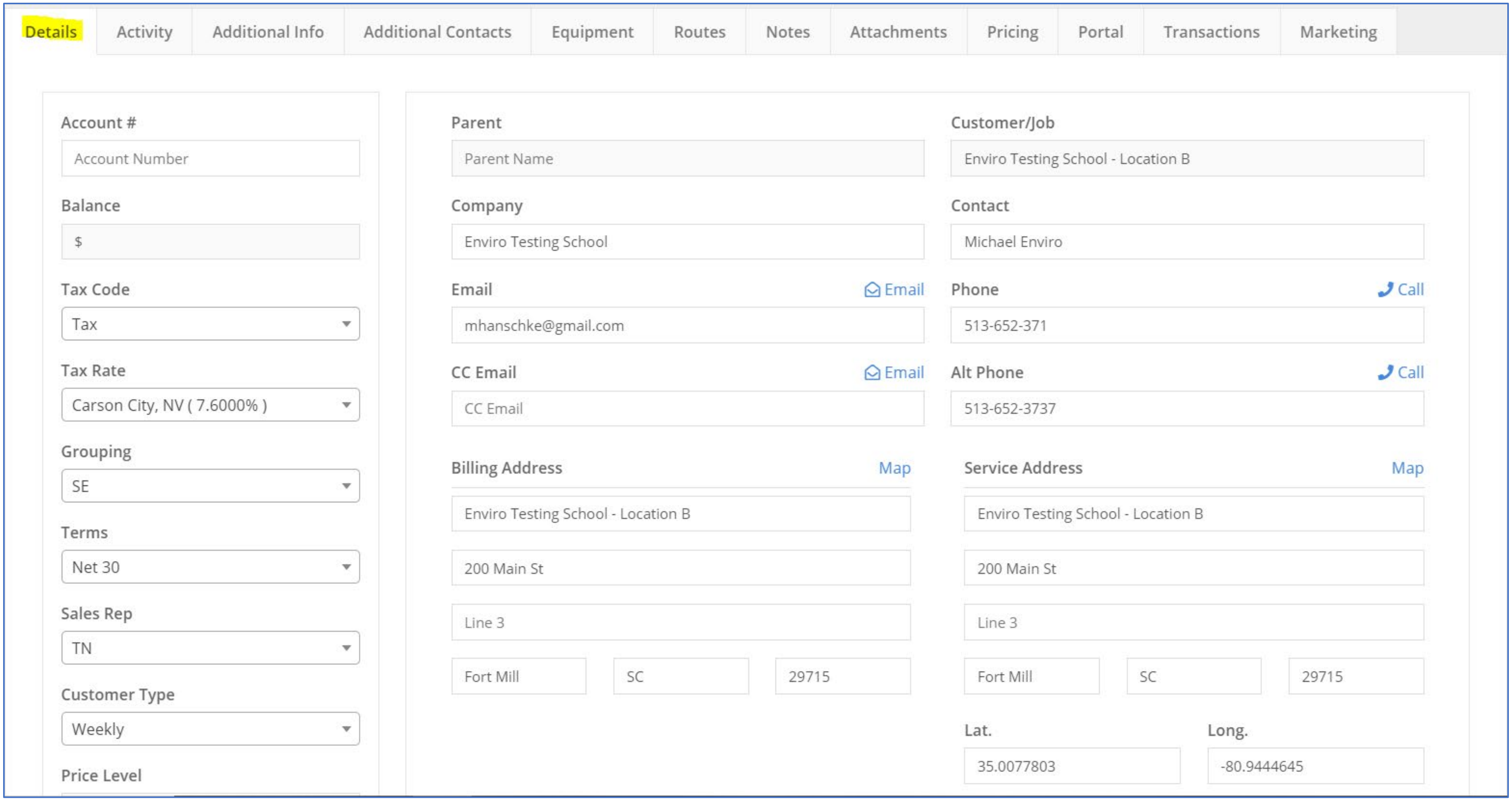


*Note: refer to the **Managing Preferred Delivery Method in QuickBooks** section in this document for more detailed instructions.*

Customer Card – tabs explained

Detail

This is essentially the QuickBooks Customer Details screen. Once a customer has been setup any subsequent updates or changes to the customer should happen in QuickBooks – the system of record:



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

Menu

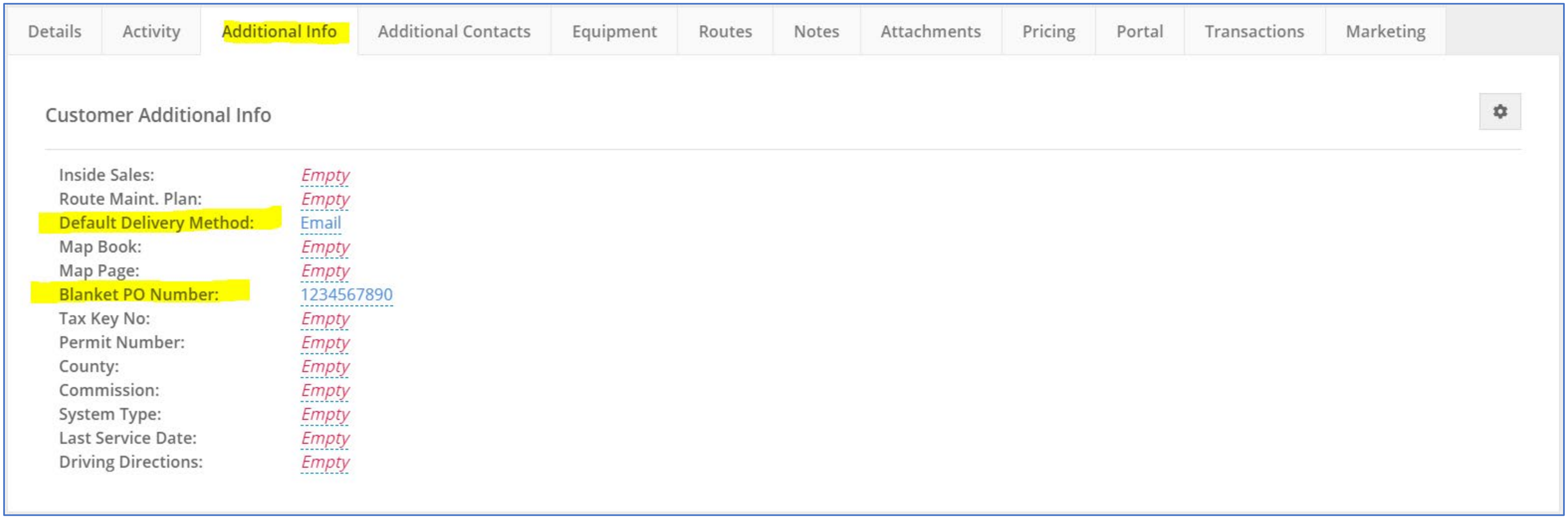
Search List

Last

	Txn #	Type	Message	Time Stamp	User
19	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:56:03 am	admin
20	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:56:03 am	admin
21	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:56:03 am	admin
22	-n/a-	Route Cancelled	Route: CORP2 Stop: 0 has been cancelled for this customer on 10/01/2020 07:55 AM.	10/01/2020 7:55:44 am	admin
23	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:55:31 am	admin
24	CORP1129	Invoice Updated	Date has been updated from Route Schedule Change	10/01/2020 7:55:31 am	admin
25	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:55:31 am	admin
26	CORP1129	Invoice Updated	Date has been updated from Route Schedule Change	10/01/2020 7:55:31 am	admin
27	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:55:31 am	admin
28	CORP1129	Invoice Updated	Date has been updated from Route Schedule Change	10/01/2020 7:55:31 am	admin
29	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:55:31 am	admin
30	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:55:31 am	admin
31	-n/a-	Route Changed	A change to the customers route was made.	10/01/2020 7:55:31 am	admin

Additional Info

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



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

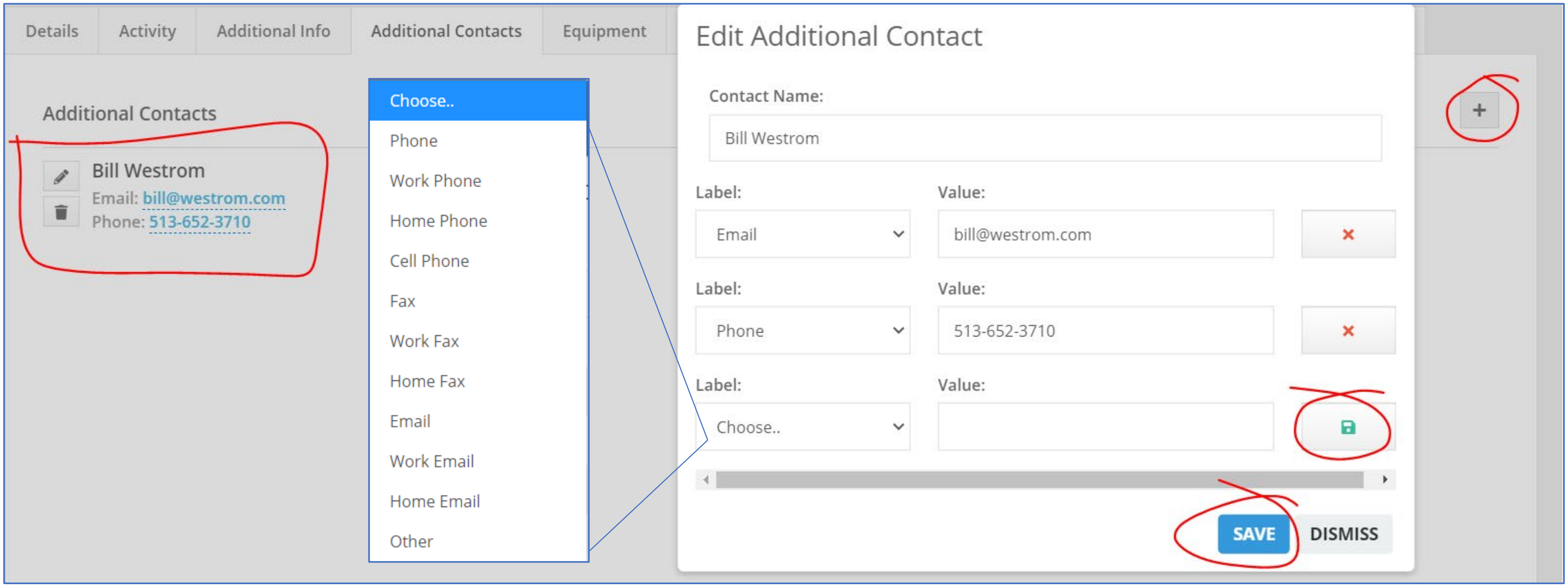
> *Default Delivery Method: Used to create an invoice in the send Form (Print or Email) Queues QuickBooks when posting an invoice.*

> *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.

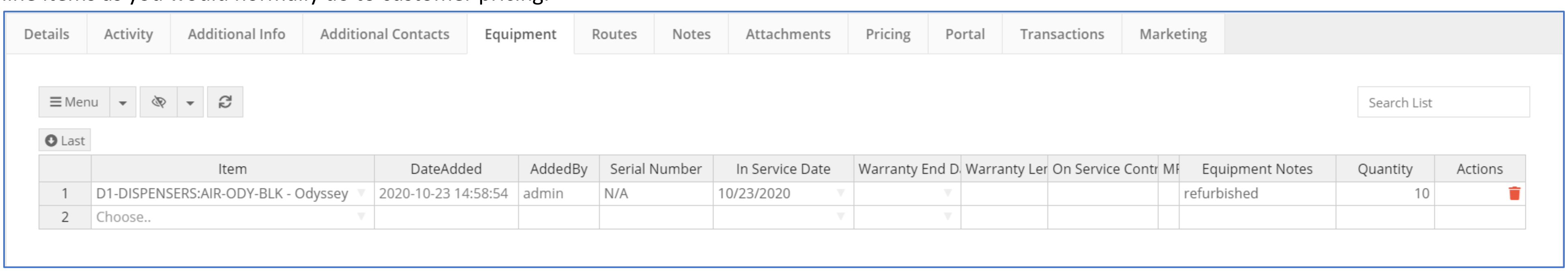
Additional Contacts

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



Equipment

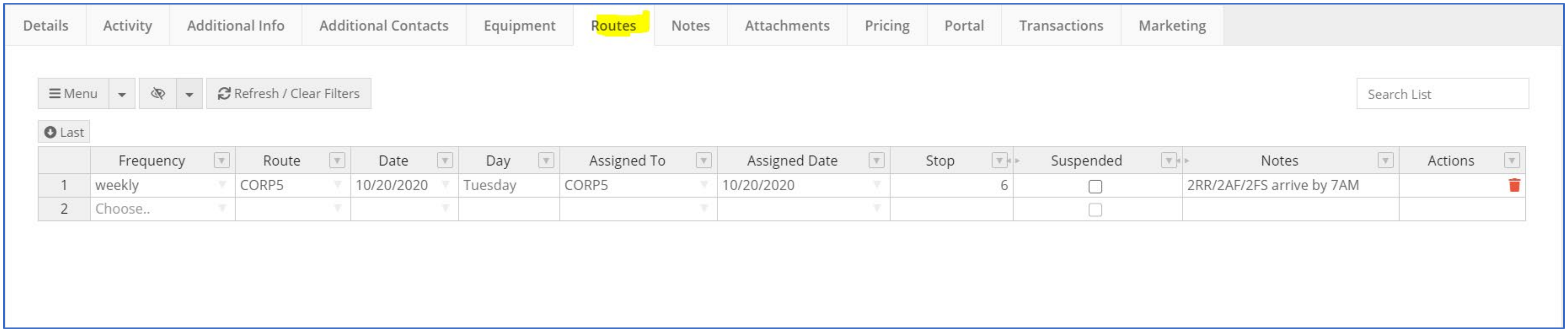
We have the ability to track equipment at a customer location, out side of the normal dispensers added to installation invoices. Just add equipment / dispenser line items as you would normally do to customer pricing.



These records are exportable to Excel

Routes

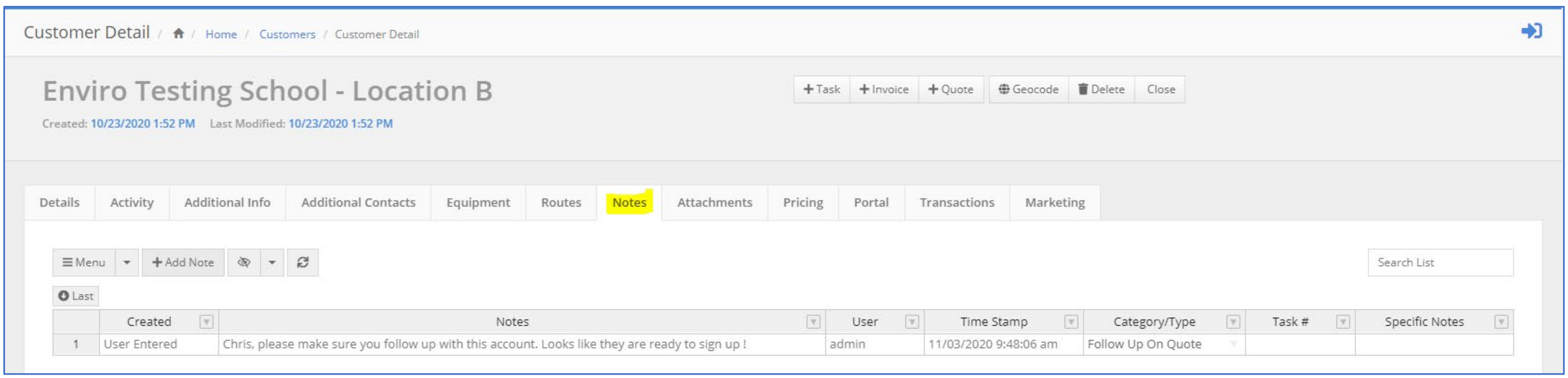
This tab allows the entry of Routing to a customer (may also be done on the Route Schedule):



Make sure you have excellent Route Notes

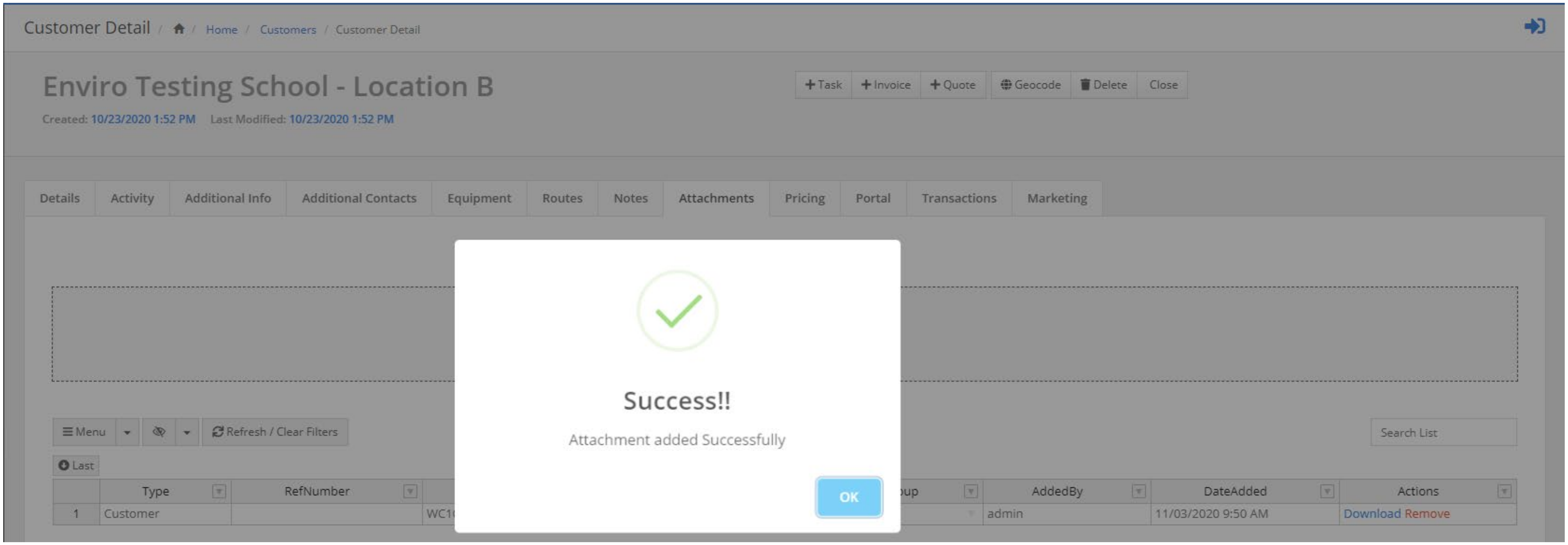
Notes

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:**



Attachments

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



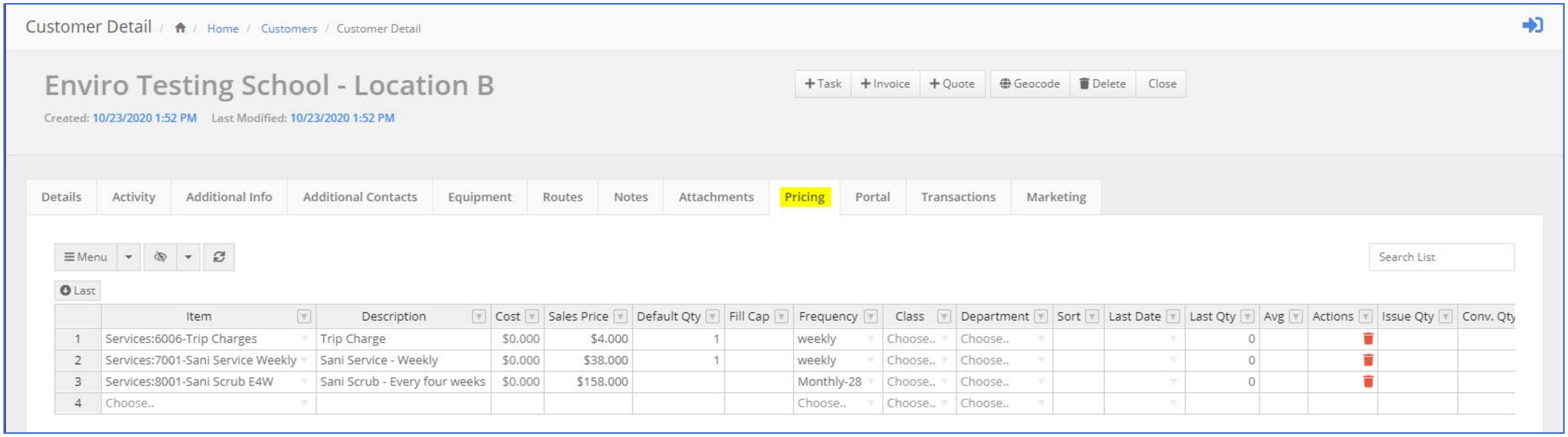
Add **Notes** to the attachment:

	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

Pricing

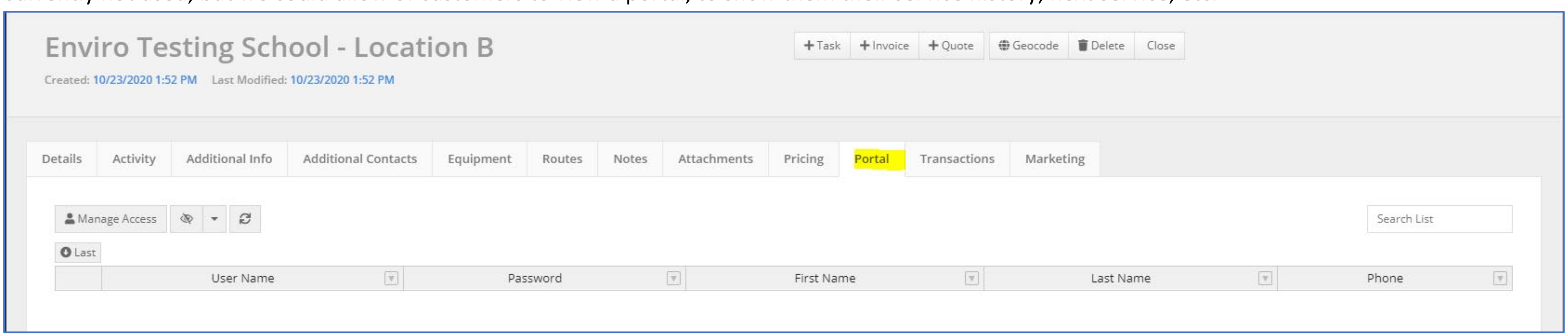
Add any items to the Pricing tab.

- 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



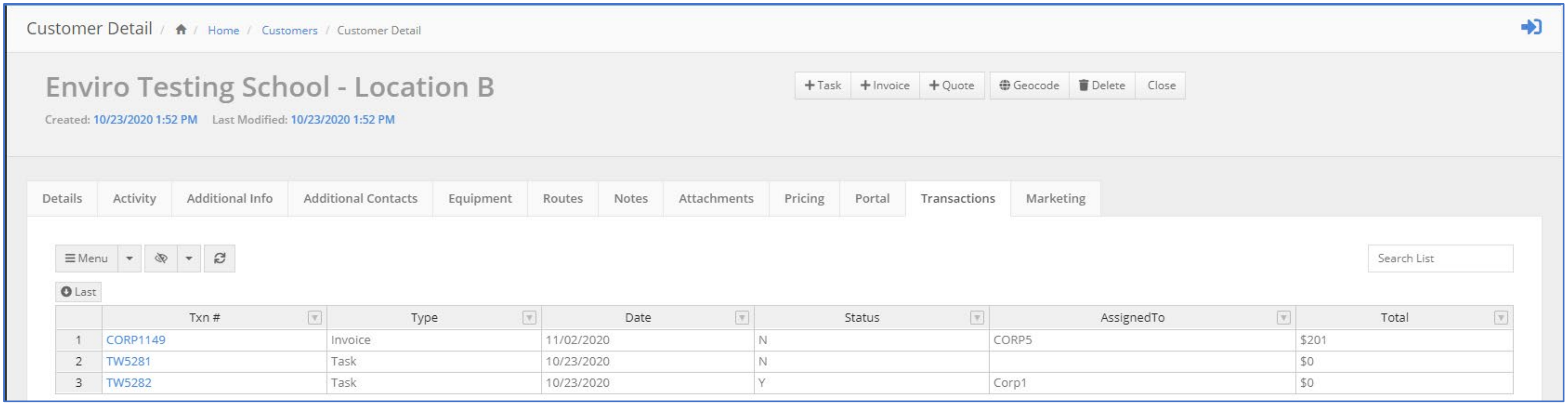
Portal

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



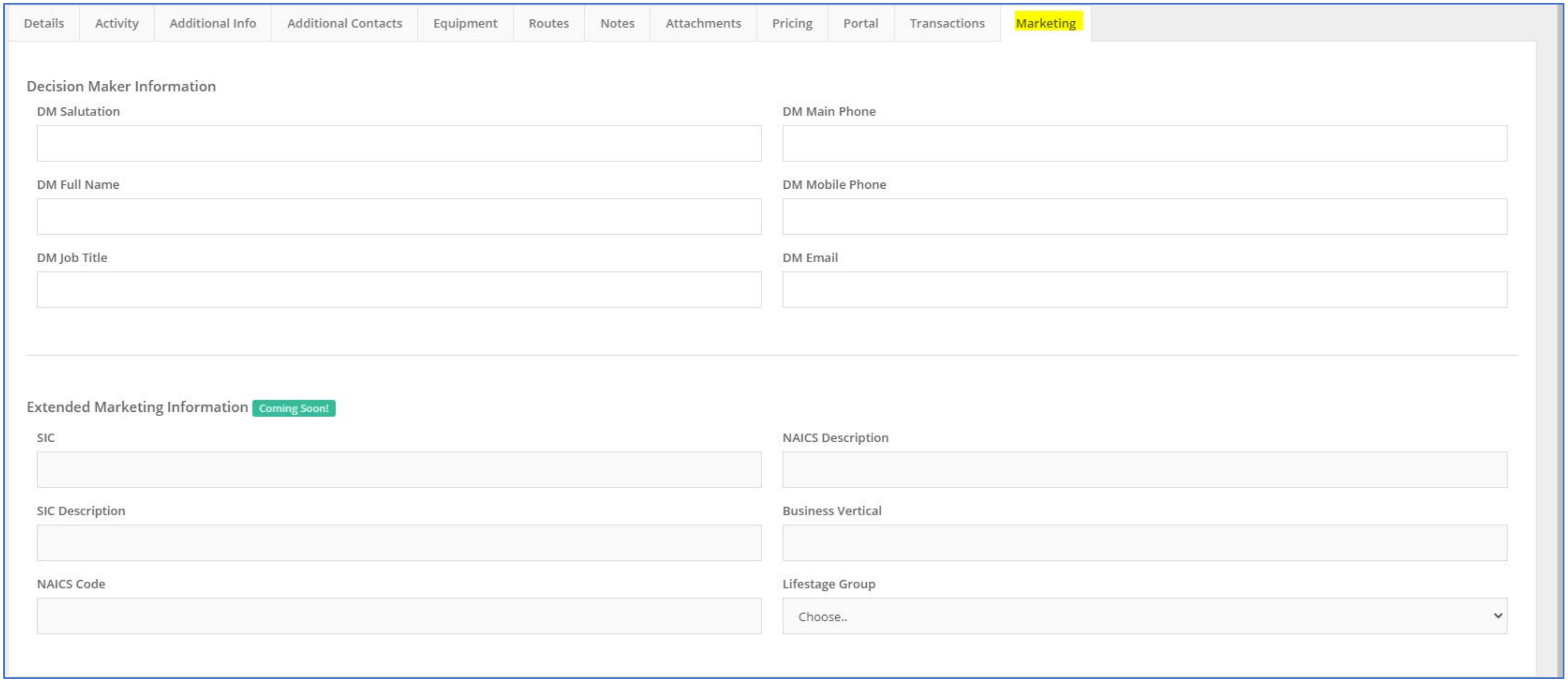
Transactions

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).



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.



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

Managing **Preferred Send Method** in QuickBooks

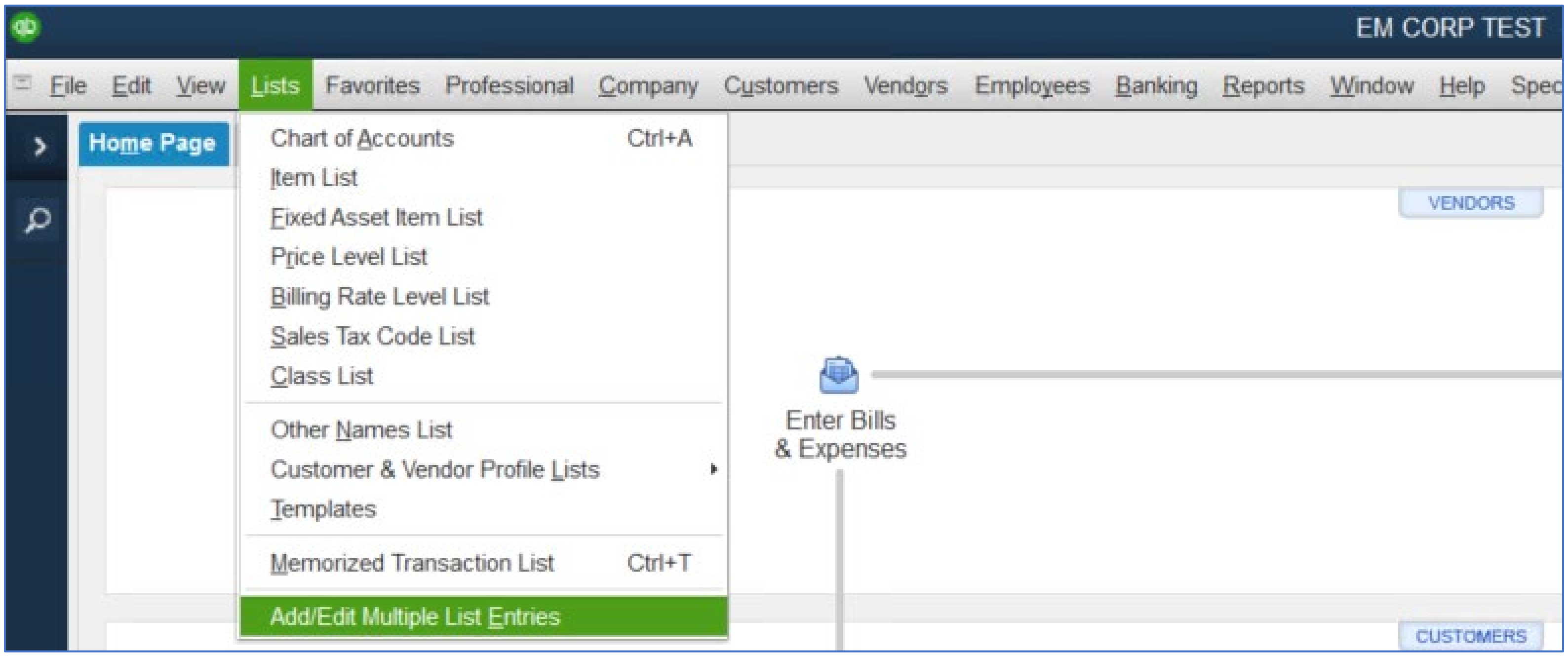
It is important that this filed is maintained for all customers. The filed may be jointly managed by yourself and the Corporate A/R team, as some consolidated billing accounts have specific criteria on how the receive statements. When in doubt, consult with your Corporate A/R representative.

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

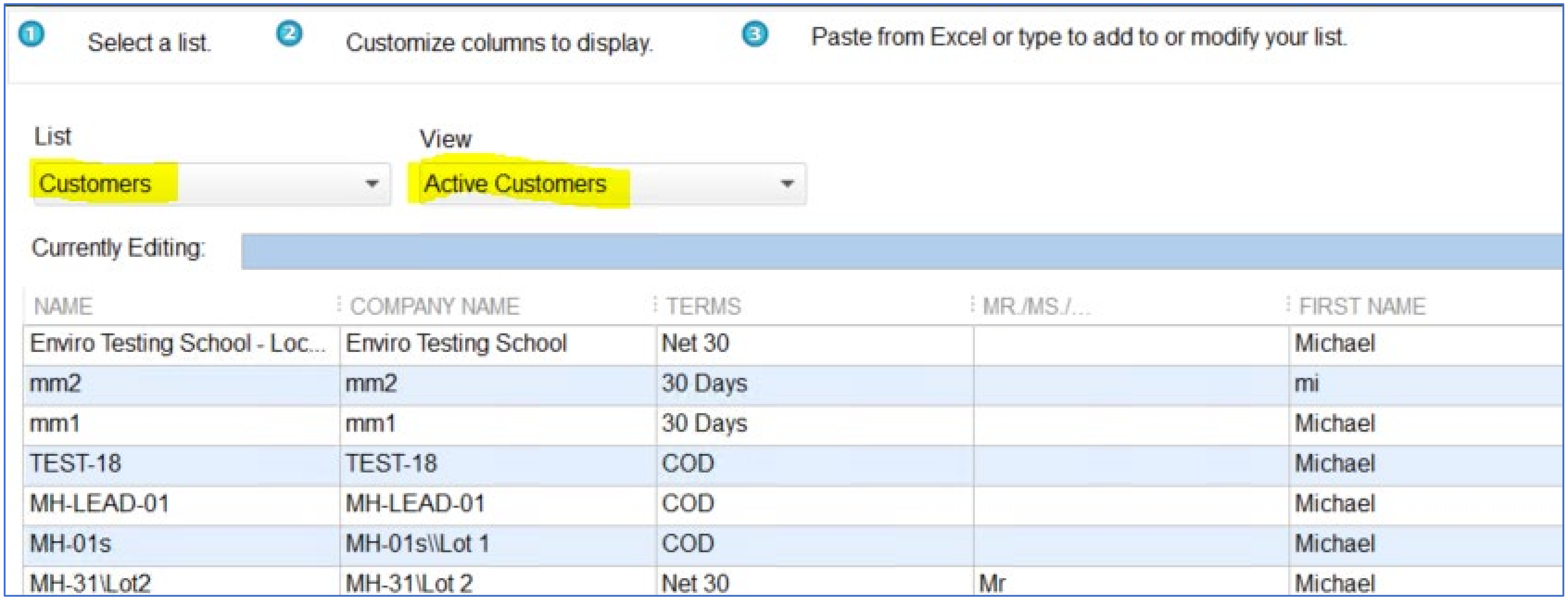
- None – default value, meaning they will not receive a statement (mainly used by Corporate Accounts)
  Note: C.O.D. and Recurring Credit Card terms customers may also be set to none.
- Mail – they will receive a hardcopy emailed statement
- E-Mail - they will receive an emailed statement (they must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

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

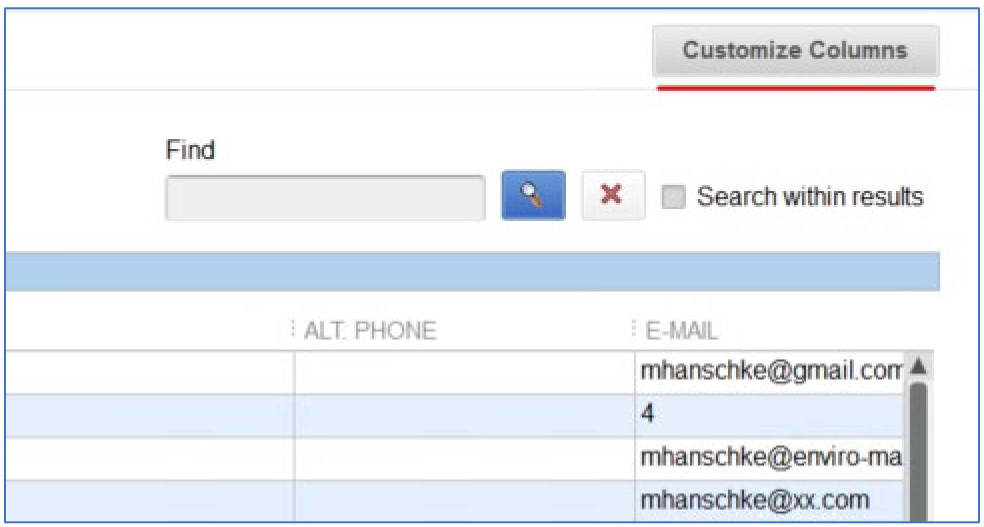
#1. Select **Edit, Add/Edit Multiple List Entries** from your QuickBooks Menu:



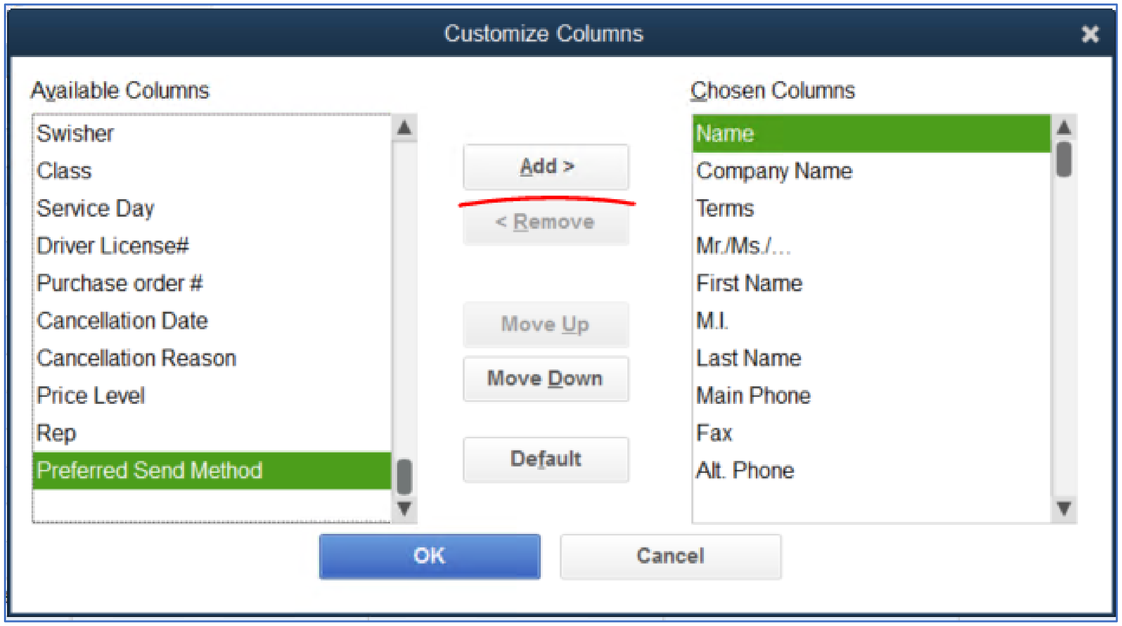
Make sure the List defaults to **Customers, Active Customers:**



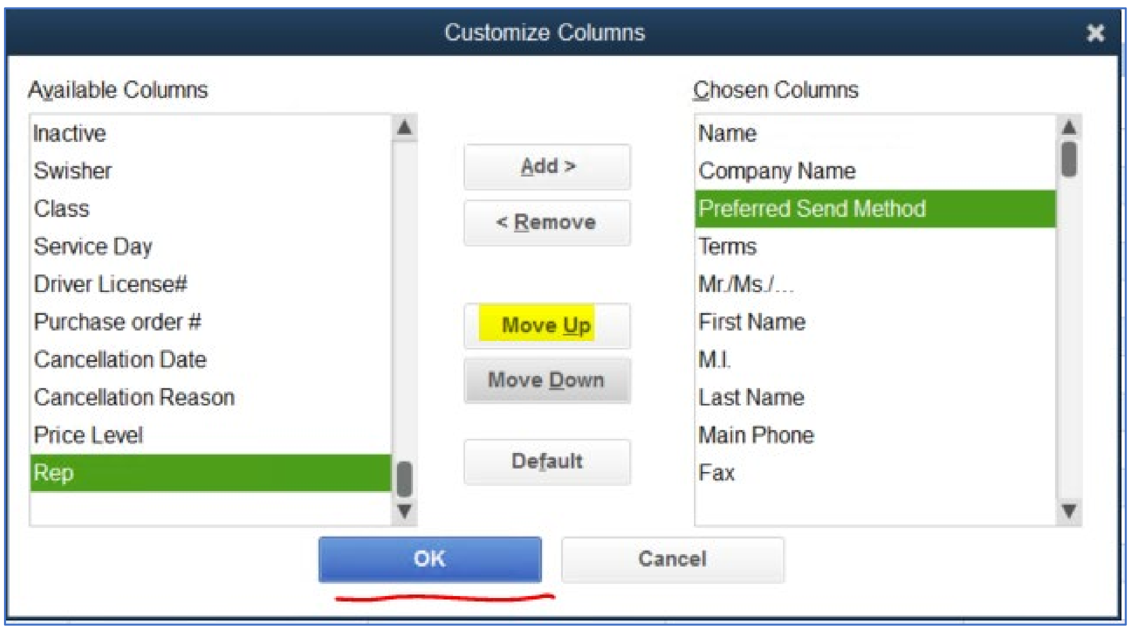
#2. On the far-right, select **Customize Columns:**



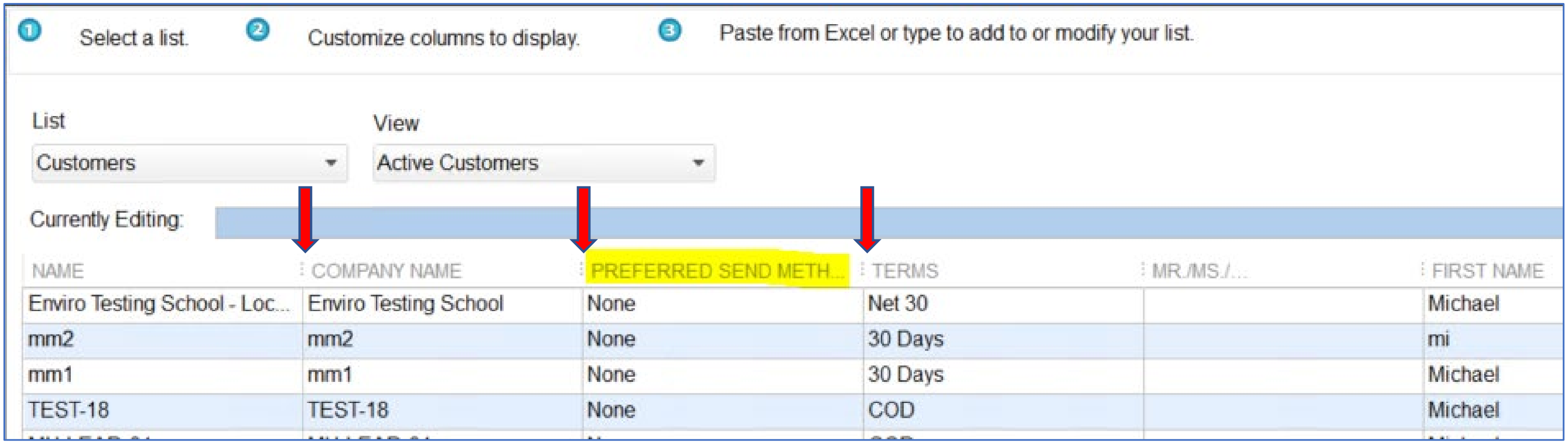
#3. Scroll down and look for the **Preferred Send Method** column and Select **Add >**:



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

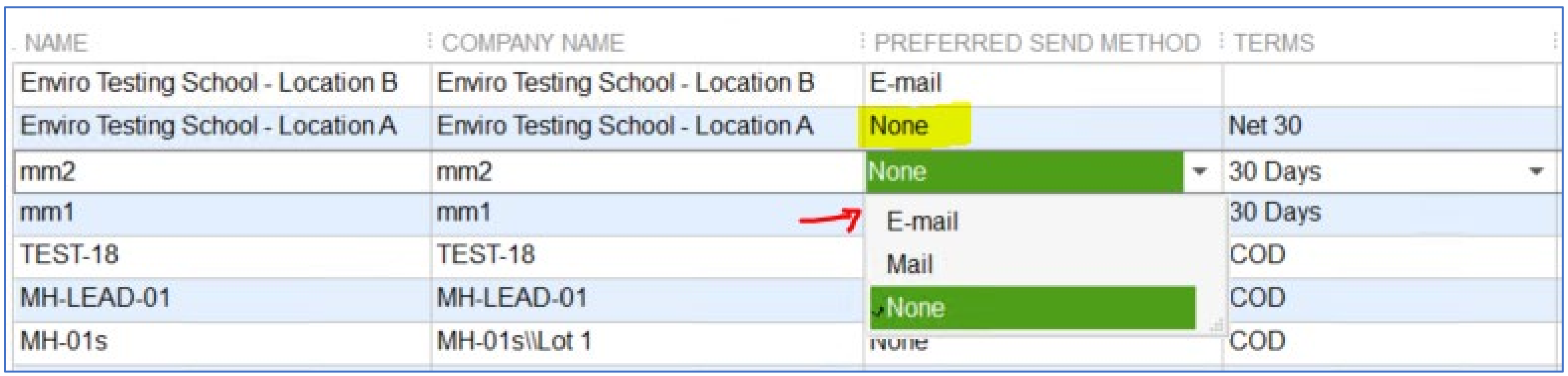


#5. Use the Column **adjustment dividers** to adjust the column widths (notice Terms has also been *added* to this view!):



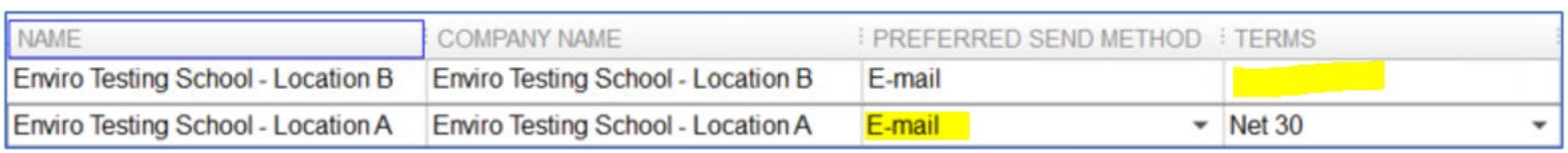
NAME	COMPANY NAME	PREFERRED SEND METH...	TERMS	MR./MS./...	FIRST NAME
Enviro Testing School - Loc...	Enviro Testing School	None	Net 30		Michael
mm2	mm2	None	30 Days		mi
mm1	mm1	None	30 Days		Michael
TEST-18	TEST-18	None	COD		Michael

#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		30 Days
TEST-18	TEST-18		COD
MH-LEAD-01	MH-LEAD-01		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)

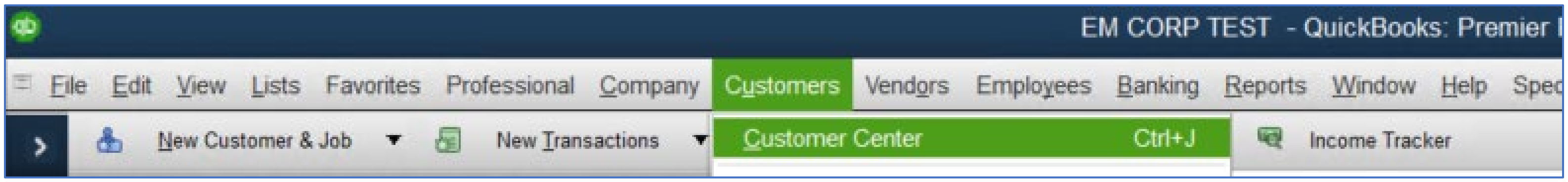
Save Changes

Monitoring **Terms** in QuickBooks

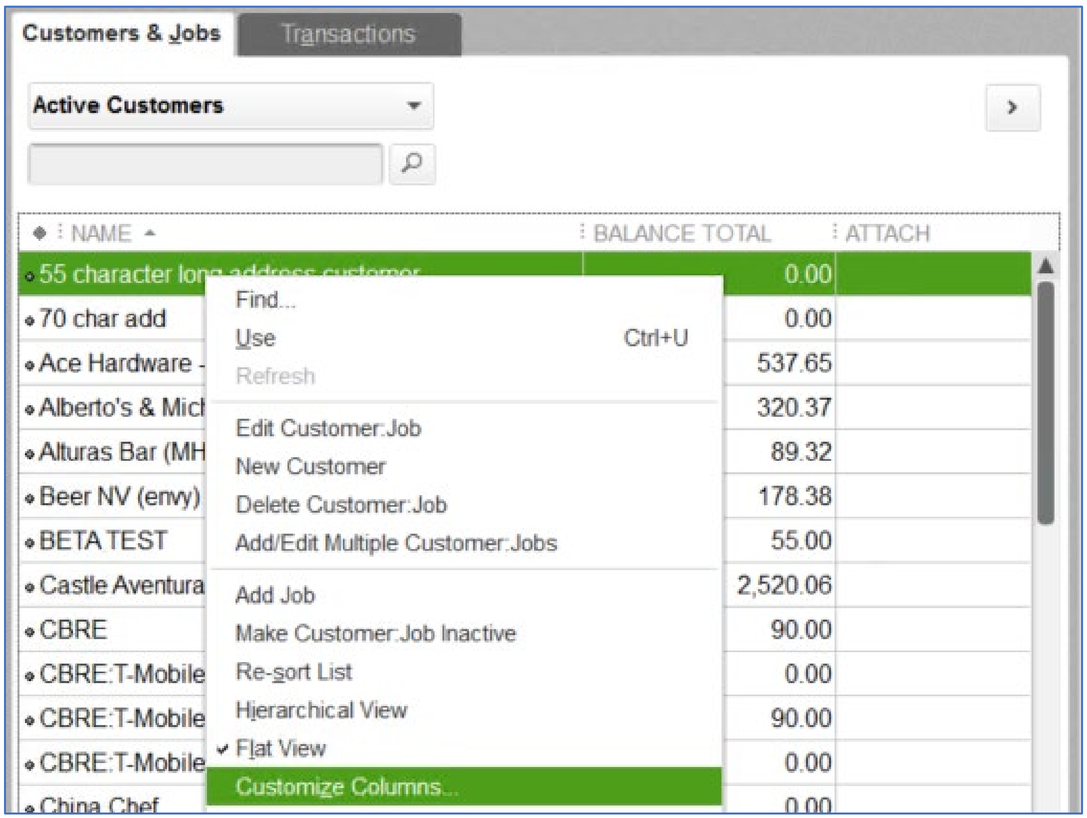
Payment Terms are critical in QuickBooks (in business in general) and drive aging reports and statement accuracy. A periodic review of Payment Terms is a good idea. Try to keep the number of Payment Terms to a minimum and try to not allow yourself to grant Terms more than 30 days, as this will affect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

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

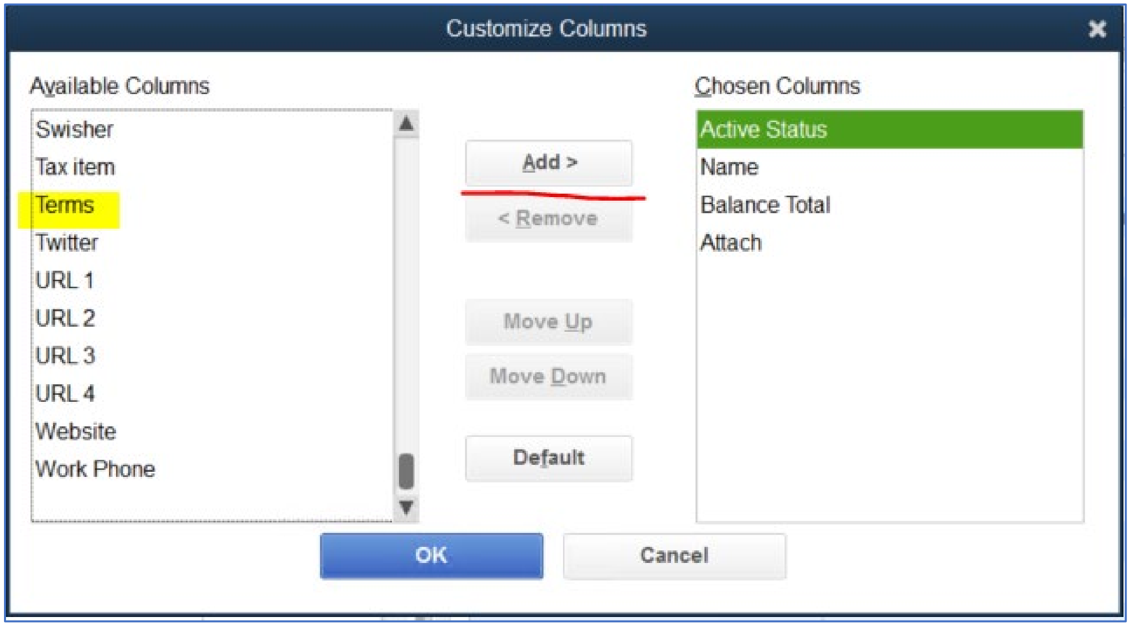
#1. Open the **Customer Center** under **Customers** in QuickBooks:



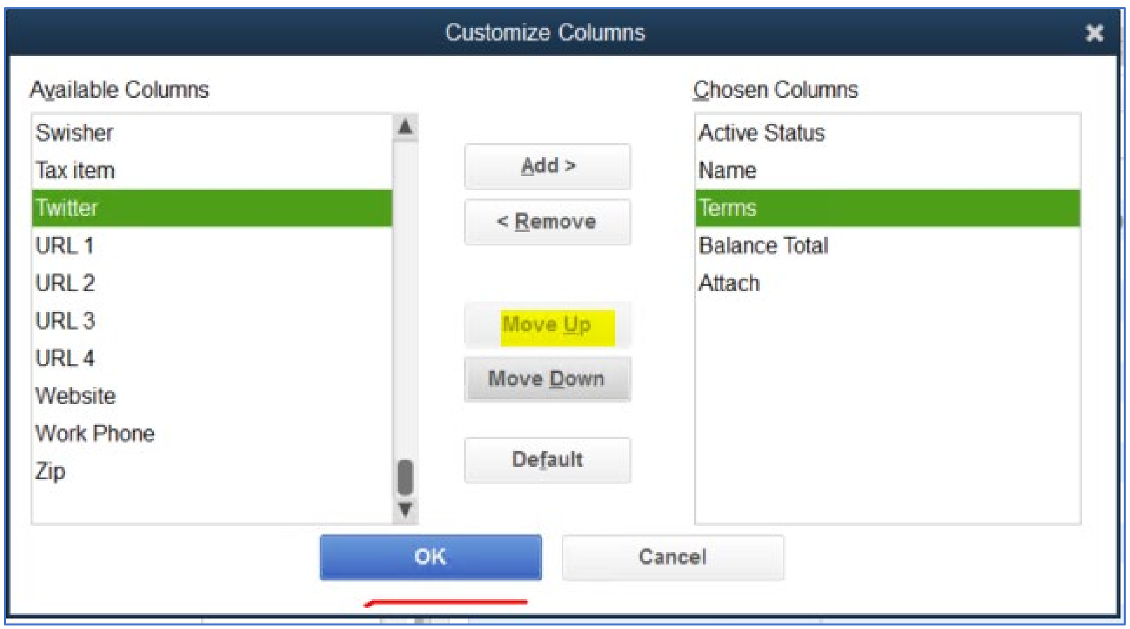
#2. **Right-click** any Name on the Customer List and select **Customize Columns**:



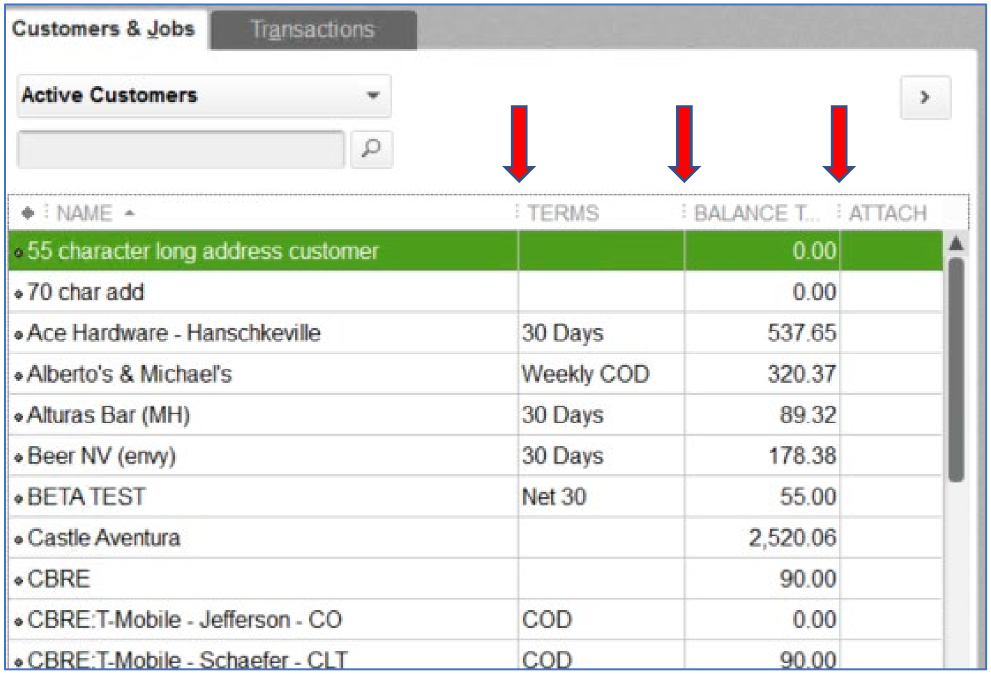
#3. Scroll down and look for the **Terms** column and Select **Add >**:



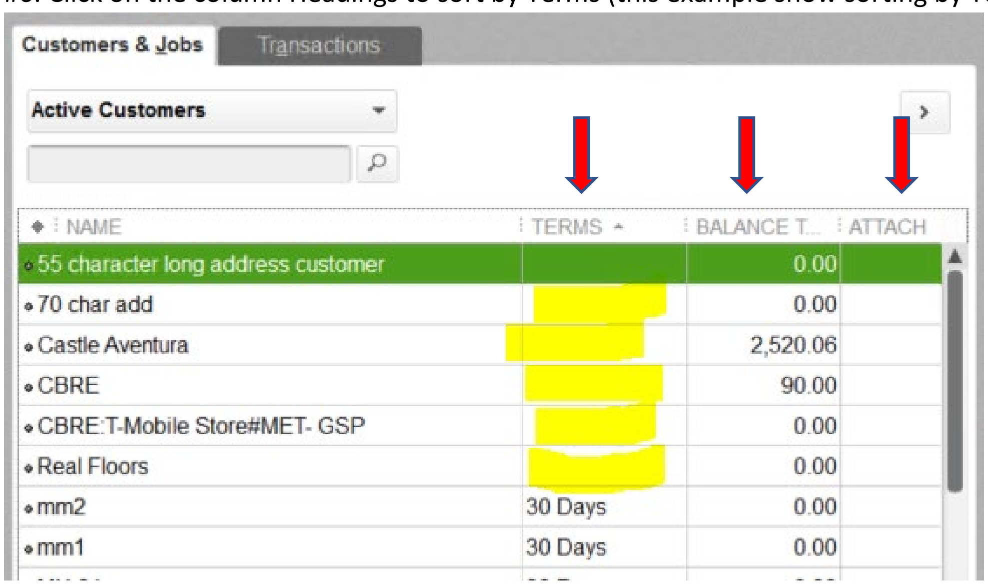
#4, Use the **Move Up** button to reposition the field as shown (or anywhere really) and select **OK**:



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



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



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