



# BEST PRACTICES ACCOUNT MAINTENANCE

12/2020

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## RSO – ACCOUNT MAINTENANCE

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### Introduction

Account Maintenance is a vital function in your business, which directly impacts the 7C's. Ensuring that accounts are re-routed correctly, priced correctly and have the correct details is an important aspect of your business. Consequences of not keeping your accounts maintained could be:

- Inefficient Routing (not ordered correctly)
- Poor collections (improper account inactivation)
- Missing Payments (bad customer address)
- Inaccurate Invoices (incorrect pricing)
- Lost revenue (incorrect or missing items)
- Technician Frustration (bad data that is never updated)
- Incorrect Routing (not cancelling customers correctly)
- Incorrect Technician Pay (Incorrect classes)
- Incorrect Sales Person commissions (incorrect Sales Rep)

As you can see, a little bit of time spent on account maintenance can go a long way.

Maintenance is a delicate balance of changes that are required in RSO and some changes that need to be made in RSO.

# RSO – ACCOUNT MAINTENANCE

## Customer Details

Navigate to **Customers / Customer List**, open customer record and select **Details** tab and make any required changes. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

### Ace Hardware - Hanschkeville

Created: 01/27/2020 2:52 PM Last Modified: 07/20/2020 10:17 AM

+ Task + Invoice + Quote Geocode Delete Close

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

<b>Account #</b> Account Number	<b>Parent</b> Parent Name	<b>Customer/Job</b> Ace Hardware - Hanschkeville
<b>Balance</b> \$537.65	<b>Company</b> Ace Hardware - Hanschkeville	<b>Contact</b> Michae Hanschke
<b>Tax Code</b> Tax	<b>First Name</b> Michae	<b>Last Name</b> Hanschke
<b>Tax Rate</b> Gardnerville, NV - Douglas ( 7.1000% )	<b>Email</b> <a href="#">Email</a> mhanschke@enviro-master.com	<b>Phone</b> <a href="#">Call</a> 5136523710
<b>Grouping</b> Choose..	<b>CC Email</b> <a href="#">Email</a> CC Email	<b>Alt Phone</b> <a href="#">Call</a> Alt Phone
<b>Terms</b> 30 Days	<b>Billing Address</b> <a href="#">Map</a> Ace Hardware - Gardnerville Josh Peters 1406 Industrial Way Gardnerville NV 89410	<b>Service Address</b> <a href="#">Map</a> Ace Hardware - Gardnerville Josh Peters 1406 Industrial Way Gardnerville NV 89410
<b>Sales Rep</b> JI		<b>Lat.</b> 38.818277
<b>Customer Type</b> Weekly		<b>Long.</b> -119.649498
<b>Price Level</b> Price Level		
<b>Credit Limit</b> Credit Limit		

*Note: Some of the fields are not changeable in RSO (Customer/Job) – that change would need to be made in QB.*

*Note: The Form autosaves changes, once you navigate (or tab) away from the field.*

# RSO – ACCOUNT MAINTENANCE

## Route Adjustments

Route adjustments are required when a new customer is signed up or you wish to change what route a customer is service by. There are several ways in the software to accomplish this task, either changing, adding or removing.

### Route Changes - Customer Card

Navigate to **Customers / Customer List**, open customer record and select **Routes** tab and make any required changes. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

**Ace Hardware - Hanschkeville**

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Details Activity Additional Info Additional Contacts Equipment Billing Info **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	CORP1	01/22/2021	Friday	CORP1	01/22/2021	0	<input checked="" type="checkbox"/>	please perform and charge the Services:7010-Sani Add'l Restroom line item	
2 Choose..							<input type="checkbox"/>		

January 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

*Note: It's always best to use the tab key when navigating between columns on any Grid.*

### Route Changes - Route Schedule

Changes can also be made directly on the Route Schedule itself. Navigate to **Routes / Schedule** and make any required changes on the Grid.

Route Schedule / Home / Route Schedule

Menu Refresh/Clear Filters Actions Legend: Geocoding Error Not Optimized Stop Completed Customer Detail + Create Delete Stop Search Route Schedule

Frequency	Route	Date	Day	Assigned To	Assigned Date	Stop	Customer	Service Address	Suspended	No
1 weekly	CORP2	01/18/2021	Monday	CORP2	01/18/2021	0	Alturas Bar (MH)	Patrick Coleman Reno, NV 89512	<input checked="" type="checkbox"/>	8am Service / 3 RR's / Employee Restroom add
2 weekly	CORP2	01/18/2021	Monday	CORP2	01/18/2021	2	Castle Aventura	Suite 500 Charlotte, NC 28217	<input type="checkbox"/>	3 RR's / 3 FS / 3 AF / Sani-Guard Kitchen
3 weekly	CORP2	01/18/2021	Monday	CORP2	01/18/2021	2	CBRE:T-Mobile - Jefferson - CO	Mitchell Court River Rouge, MI 48218	<input checked="" type="checkbox"/>	GUARD only, make sure employees are out of st
4 weekly	CORP1	01/18/2021	Monday	CORP5	01/18/2021	1	MH-12\Lot2	5555 City Center Charlotte, NC 28277	<input type="checkbox"/>	2 rrs / 2 af / 2 fs / 4 fixtures
5 weekly	CORP2	01/18/2021	Monday	CORP5	01/18/2021	2	mh2	5200 77 Center Dr Charlotte, NC 28217	<input type="checkbox"/>	3 RR / 5 FS / 3 AF / 2 urinal screens if needed
6 weekly	CORP5	01/18/2021	Monday	CORP5	01/18/2021	3	Castle Aventura	Suite 500 Charlotte, NC 28217	<input type="checkbox"/>	6 RR with AF / 2 UM / no FS Start with 2 restroom
7 weekly	CORP5	01/18/2021	Monday	CORP5	01/18/2021	4	MH-17	9805 Longstone Ln Charlotte, NC 28277	<input type="checkbox"/>	COD / RR's / 9 fixtures / 2 AF / 4FS / 3 JRT dispens

# RSO – ACCOUNT MAINTENANCE

## Route Additions - Customer Card

Navigate to **Customers / Customer List**, open customer record and select **Routes** tab and make any required changes. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

### Ace Hardware - Hanschkeville

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+Task +Invoice +Quote Geocode Delete Close

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

Menu Refresh / Clear Filters

Frequency	Route	Date	Day	Assigned To	Assigned Date	Stop	Suspended	Notes
1 weekly	CORP1	01/22/2021	Friday	CORP1	01/22/2021	2	<input checked="" type="checkbox"/>	please perform and charge the Services:7010-Sani Add'l Restroom line item
2 weekly	CORP5	01/14/2021	Thursday	CORP5	01/14/2021	3	<input type="checkbox"/>	4RR, 2U, 2AF, 4 HS - please see manager when service is completed
3 Choose..	CORP1						<input type="checkbox"/>	
	CORP2							
	CORP5							

Note: New Route events may be entered wherever the choose option is displayed on the Grid.

Note: It's always best to use the tab key when navigating between columns on any Grid.

## Route Additions - Route Schedule

Changes can also be made directly on the Route Schedule itself. Navigate to **Routes / Schedule** and make any required changes on the Grid.

26	weekly	CORP2	01/22/2021	Friday	CORP2	01/22/2021	2	Artures Bar (winy)	
27	weekly	CORP5	01/22/2021	Friday	CORP5	01/22/2021	0	Beer NV (envy)	Daniel Puga Reno, NV 89506
28	Weekly-M	CORP5	01/25/2021	Monday	CORP5	01/25/2021	6	BETA TEST	100 Main St Fort Mill, SC 29715
29	Weekly-Th	CORP5	02/11/2021	Thursday	CORP5	02/11/2021	6	Bills Bar	100 Main St Fort Mill, SC 29715
30	Monthly-28	CORP5	02/26/2021	Friday	CORP5	02/26/2021	0	Castle Aventura	Jamie Ficco Reno, NV 89511
31	weekly-2	CORP5	01/15/2021	Friday	CORP5	01/15/2021	1		
32	Choose..								

Note: Navigate to the bottom of the Grid and enter the new Route stop wherever the choose option is displayed on the Grid.

Note: It's always best to use the tab key when navigating between columns on any Grid.

# RSO – ACCOUNT MAINTENANCE

## Route Removal - Customer Card

Navigate to **Customers / Customer List**, open customer record and select **Routes** tab and make the required deletion. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

### Ace Hardware - Hanschkeville

Created: 01/27/2020 2:52 PM Last Modified: 07/20/2020 10:17 AM

+ Task + Invoice + Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment Billing Info **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	CORP1	01/22/2021	Friday	CORP1	01/22/2021	0	<input checked="" type="checkbox"/>	please perform and charge the Services:7010-Sani Add'l Restroom line item	
2	weekly	CORP5	01/14/2021		CORP5	01/14/2021	0	<input type="checkbox"/>	One time	
3	Choose..							<input type="checkbox"/>		

Note: Use the Red Trash can on the Action column to remove a route stop.

## Route Removal - Route Schedule

Changes can also be made directly on the Route Schedule itself. Navigate to **Routes / Schedule** and make the required deletion on the Grid.

Route Schedule / Home / Route Schedule

Menu Refresh/Clear Filters Actions Legend: Geocoding Error Not Optimized Stop Completed Custo

	er	Service Address	Suspended	Notes	Actions	Category
1	hanschkeville	Josh Peters Gardnerville, NV 89410	<input type="checkbox"/>	One time		
2		Patrick Coleman Reno, NV 89512	<input checked="" type="checkbox"/>	8am Service / 3 RR's / Employee Restroom added / please make sure FS and AF dispensers are in RR		Sani
3		Suite 500 Charlotte, NC 28217	<input type="checkbox"/>	3 RR's / 3 FS / 3 AF / Sani-Guard Kitchen		Sani
4	erson - CO	Mitchell Court River Rouge, MI 48218	<input checked="" type="checkbox"/>	GUARD only, make sure employees are out of store		Guard
5		5555 City Center Charlotte, NC 28277	<input type="checkbox"/>	2 rrs / 2 af / 2 fs / 4 fixtures		Sani

Note: Use the Red Trash can on the Action column to remove a route stop.

# RSO – ACCOUNT MAINTENANCE

## Route Removal - Reason

You will be prompted to enter a reason for why this service was lost or removed:

The screenshot shows a web application interface with a modal dialog box titled "Stop Cancellation". The background page displays customer details for "Ace Hardware - Hanschkeville" and a table of service items.

**Stop Cancellation Dialog Fields:**

- Cancellation Date:** 01/13/2021 4:47 PM
- Report?:** Yes
- Reason:** Required (Text input field: Type to Search)
- Will Comeback:** No
- Switched to:** (Text input field: Type to Search)
- Notes:** (Large text area)

**Buttons:** Cancel, Remove Stop

**Background Page Details:**

- Customer Detail / Home / Customers / Customer Detail
- Ace Hardware - Hanschkeville**
- Created: 01/27/2020 2:52 PM Last Modified: 07/20/2020 10:17 AM
- Menu, Refresh / Clear Filters
- Table with columns: Last, Frequency, Route, Date, Day

Last	Frequency	Route	Date	Day
1	weekly	CORP1	01/22/2021	Friday
2	weekly	CORP5	01/14/2021	
3	Choose...			

*Note: This removal will be captured ion the Retain Dashboard.*



# RSO – ACCOUNT MAINTENANCE

## Price Adjustments

Item Changes - Customer Card

Navigate to **Customers / Customer List**, open customer record, select the **Pricing** tab and make the change on the **Sales Price**. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

### Ace Hardware - Hanschkeville

Created: 01/27/2020 2:52 PM Last Modified: 07/20/2020 10:17 AM

+ Task + Invoice + Quote Geocode Delete Close

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

Menu Choose.. +

Last

	Item	Description	Cost	Sales Price	Default Qty	Fill Cap	Frequency	Class	Department	Sort	Last Date
1	A1-PAPER:8 in Hardwound Kraft	8 inch Hardwound Kraft		\$7.500			Choose..	Choose..	Choose..		
2	Services:6002-Micro Fiber Mop	Micro Fiber Mop		15.50			Choose..	Choose..	Choose..		
3	6008-Remove Dispensers	Remove Dispensers	\$0.000	\$0.000			Choose..	Choose..	Choose..		

Note: It's always best to use the tab key when navigating between columns on any Grid.

Item Changes - Item Customer Pricing

Navigate to **Items / Customer Pricing** and enter the new pricing directly on the Grid:

Customer Pricing / Home / Customer Pricing

Menu Search Pricing

Last

	Customer	Item	Description	Cost	Sales Price	Fill Cap	Avg	Department	Class	Frequency	Last Modified
1	55 character long address customer	Services:6006-Trip Charges	Trip Charge	\$0.000	\$5.000	0				weekly	07/27/2020
2	55 character long address customer	Services:7000-Smart Drain Installs	Smart Drain Installation	\$0.000	\$14.000						01/12/2021
3	55 character long address customer	6004-Smart Drain Service	Smart Drain Service	\$0.000	\$55.000			CORP1			01/12/2021
4	70 char add	Services:5000-Dispenser Installs	Warranty Dispenser Installation	\$0.000	\$0.000						06/24/2020
5	70 char add	Services:6006-Trip Charges	Trip Charge	\$0.000	\$5.000	0				weekly	07/27/2020
6	Ace Hardware - Hanschkeville	Services:6006-Trip Charges	Trip Charge	\$0.000	\$5.000	0				weekly	07/27/2020
7	Ace Hardware - Hanschkeville	A1-PAPER:8 in Hardwound Kraft	8 inch Hardwound Kraft		7.50						10/01/2020

Note: Be sure to press the Enter key after every price change

Note: The Grid may be sorted by Item (if you are doing a price increase) or sorted by customer (to change an individual customer).

# RSO – ACCOUNT MAINTENANCE

## Item Additions - Customer Card

Navigate to **Customers / Customer List**, open customer record and select **Pricing** tab and make any required changes. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

**Ace Hardware - Hanschkeville**

Created: 01/27/2020 2:52 PM Last Modified: 07/20/2020 10:17 AM

+ Task + Invoice + Quote Geocode Delete Close

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

Menu Choose.. + Search List

Item	Price	Default Qty	Fill Cap	Frequency	Class	Department	Sort	Last Date	Last Qty	Avg	Actions	Issue Qty	Conv. Qty
1 A1-PAPER:8 in Hardwou	\$0.000			Choose..	Choose..	Choose..			0		🗑️		
2 A1-PAPER:8 in Hardwou	\$0.000			Choose..	Choose..	Choose..			0		🗑️		
3 Services:6002-Micro Fib	\$0.000			Choose..	Choose..	Choose..			0		🗑️		
4 Services:6006-Trip Char	\$5.000	1	0	weekly	Choose..	Choose..	0		0		🗑️		
5 6008-Remove Dispense	\$0.000			Choose..	Choose..	Choose..					🗑️		
6 Choose..				Choose..	Choose..	Choose..					🗑️		

Note: New Items can be entered wherever the choose option is displayed, or existing pricing can be modified.

## Item Removal - Customer Card

Navigate to **Customers / Customer List**, open customer record and select **Pricing** tab and delete the price record. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

**Ace Hardware - Hanschkeville**

Created: 01/27/2020 2:52 PM Last Modified: 07/20/2020 10:17 AM

+ Task + Invoice + Quote Geocode Delete Close

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

Menu Choose.. + Search List

Item	Description	Cost	Sales Price	Default Qty	Fill Cap	Frequency	Class	Department	Sort	Last Date	Last Qty	Avg	Actions	Issue Qty	Conv. Qty
1 A1-PAPER:8 in Hardwou Kraft	8 inch Hardwou Kraft		\$7.500			Choose..	Choose..	Choose..			0		🗑️		
2 A1-PAPER:8 in Hardwou Kraft	8 inch Hardwou Kraft		\$0			Choose..	Choose..	Choose..			0		🗑️		
3 Services:6002-Micro Fiber Mop	Micro Fiber Mop		\$0			Choose..	Choose..	Choose..			0		🗑️		
4 6008-Remove Dispensers	Remove Dispensers	\$0.000	\$0			Choose..	Choose..	Choose..			0		🗑️		
5 Services:6006-Trip Charges	Trip Charge	\$0.000	\$5			Choose..	Choose..	Choose..	0		0		🗑️		
6 Choose..						Choose..	Choose..	Choose..					🗑️		

**Remove Item?**

Are you sure you want to delete this item from the customers pricing?

CANCEL **CONFIRM**

Note: Use the Red Trash can on the Action column to remove a pricing line item.

# RSO – ACCOUNT MAINTENANCE

## Cancellations

Customer Cancellations are handled on the Customer record itself. There is a very specific process for customer cancellations.

1. The routing must be removed for the customer, so that it does not generate invoices any longer
2. The customer must be renamed to a zzz prefix in QuickBooks
3. For customers that do not have a receivable balance, Inactivate the account in QuickBooks

## Removing Routing

Navigate to **Customers / Customer List**, open customer record and select **Routes** tab and delete all route stops. Select **Close** when completed.

Customer Detail / Home / Customers / Customer Detail

### Ace Hardware - Hanschkeville

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+Task +Invoice +Quote Geocode Delete Close

Details Activity Additional Info Additional Contacts Equipment Billing Info **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	CORP1	01/22/2021	Friday	CORP1	01/22/2021	0	<input checked="" type="checkbox"/>	please perform and charge the Services:7010-Sani Add'l Restroom line item	
2	weekly	CORP5	01/14/2021		CORP5	01/14/2021	0	<input type="checkbox"/>	One time	
3	Choose..							<input type="checkbox"/>		

*Note: Use the Red Trash can on the Action column to remove a pricing line item.*

## RSO – ACCOUNT MAINTENANCE

You will be prompted to select a cancellation reason, what competitor the customer went to (if applicable), if they will come back (which creates a task) and if you want to report it as a cancellation (it may have just been a route stop added in error).

### Stop Cancellation ✕

**Cancellation Date**

**Report?**  Yes

**Reason** Required  
 ✕

- Management change
- Out of business
- Poor service
- Routed by Mistake
- Temporary Suspension

[Add/Edit List](#)

**Will Comeback**  No

# RSO – ACCOUNT MAINTENANCE

ZZZ & Inactivate the customer

Edit both the **Customer Name** and **Company Name** and insert a ZZZ Prefix

**IF and ONLY IF**, the **CURRENT BALANCE** is \$0, you may check **Customer is Inactive**.

CUSTOMER NAME **ZZZ Ace Hardware - Hanschkevi...**

CURRENT BALANCE 537.65
How do I adjust the current balance?

**Address Info**

Payment Settings

Sales Tax Settings

Additional Info

Job Info

COMPANY NAME **ZZZ Ace Hardware - Hanschkeville**

FULL NAME   M.I.

JOB TITLE

Main Phone  Main Email

Work Phone  CC Email

Mobile  Website

Fax  Other 1

**ADDRESS DETAILS**

INVOICE/BILL TO

Ace Hardware - Gardnerville  
 Josh Peters  
 1406 Industrial Way  
 Gardnerville  
 NV 89410

SHIP TO

Ace Hardware - Gardnerville  
 Josh Peters  
 1406 Industrial Way  
 Gardnerville  
 NV 89410

Default shipping address

Customer is inactive

# RSO – ACCOUNT MAINTENANCE

## Reload Customer Master

If you have performed maintenance that involved ZZZ'ing or Inactivating accounts, you will need to perform a Customer Master reload.

The screenshot shows the QuickBooks Desktop WebConnector interface. At the top, it says "QuickBooks Dashboard" and "Connected to QuickBooks Desktop Edition". Below this, there are tabs for "Status", "Settings", and "Error Log" (with a red notification icon). The main area is divided into two sections: "Customers" and "Items". Each section has a "Reload" button. The "Customers" section shows "Last Sync: 01/14/2021 6:31 AM" and the "Items" section shows "Last Sync: 01/14/2021 6:47 AM". A dialog box titled "Reload QB Data" is overlaid on the right side of the screen. The dialog box contains the following text: "By reloading data, the matching RouteStar list will be deleted and loaded fresh from QB on the next sync." "Please make sure no one is using the program until it has completed and the data has been reloaded from QB." "Are you sure you want to continue?" At the bottom of the dialog box, there are two buttons: "CANCEL" and "YES".

*Note: This must be performed when there are no users accessing the system.*