

Chapter 2.06: Terminating a Customer

Overview

This chapter will guide you through the process of inactivating or terminating service on a customer's account. Instead of simply deleting the account from the system, you should keep the account in the program for historical data purposes, as well as occasional opportunities to start service on the account again.

NOTE: For information on permanently removing terminated accounts from Route Manager, please refer to *Chapter 3.16* of the *Supplemental Guide*.

There are five steps to follow when deactivating a customer:

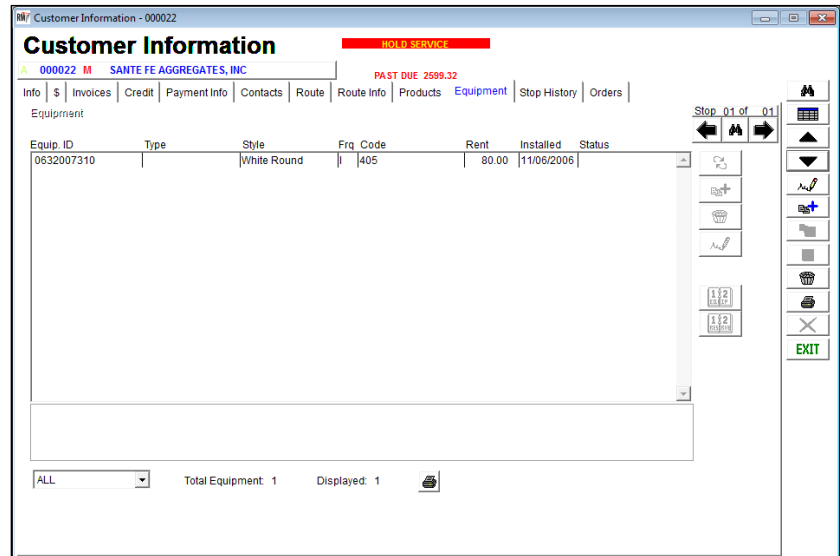
1. Pick up any installed equipment
2. Pick up any empty containers
3. Remove any account deposits
4. Reconcile the account balance
5. Deactivate the account


NOTE: The first two steps of this procedure can be skipped if you will use the handheld to pick up equipment and empty containers.

Picking up Equipment

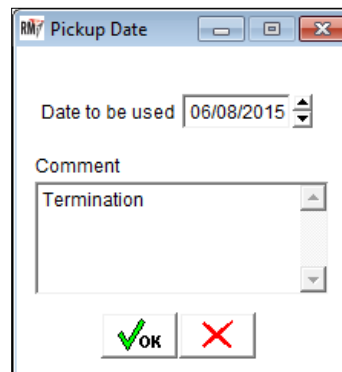
The first step in terminating a customer is to remove equipment from their account. Go to *Lists > Customer Information*, and click on the *Equipment* tab.

1. Click **Modify** on the account.
2. Select the piece of equipment to be picked up by clicking on it.



Click the Delete  key to the right of the equipment area.

3. Enter the date the equipment was picked up, and any optional comment (the comment will be displayed on the *Contacts* tab).



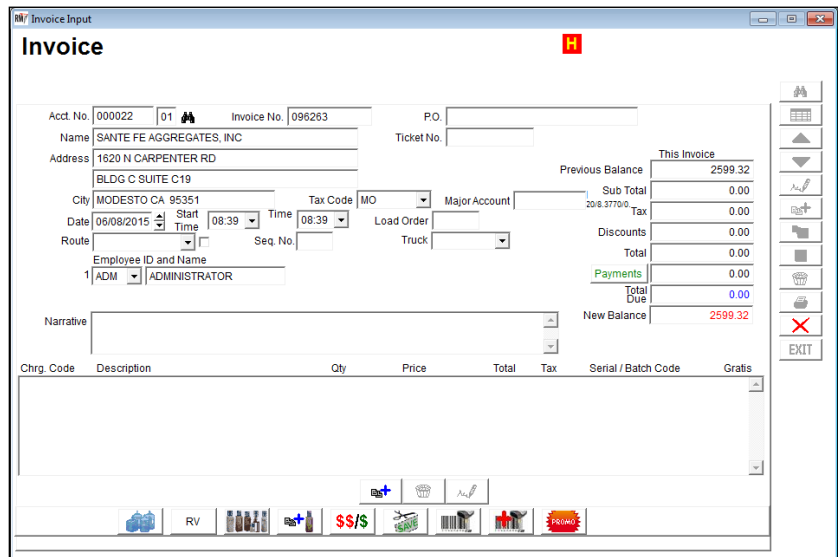
4. Click **OK**.
5. Click **Save** on the account to complete the process.

Picking up Empty Containers

When a customer terminates service, you will need to pick up their empty containers so that the account is properly credited for any deposits they may have been previously charged.

NOTE: This process will remove all deposits listed on the *Products* tab, under *Lists > Customer Information*.


To begin, create a new invoice for the customer within *Transactions > Invoices and Adjustments*.



Chrg. Code	Description	Qty	Price	Total	Tax	Serial / Batch Code	Gratis
700	5 GALLON DEPOSIT	-1	6.00	-6.00	0.0000		

Enter all of the deposit codes on the invoice and the quantity of containers being picked up (or refunded) as a negative number:

Chrg. Code	Description	Qty	Price	Total	Tax	Serial / Batch Code	Gratis
700	5 GALLON DEPOSIT	-1	6.00	-6.00	0.0000		

NOTE: If the option 'Use Quick Return Entry' in *Branch Setup* is enabled, you can click the *Returns*  button on the bottom of the screen, and enter the number of empties being credited.

Click **Save** on the invoice, and *Post* the transaction on the account to complete the process.

Reconciling the Account Balance

To deactivate an account, the account balance must be zero (0.00). There are two methods for adjusting the account balance:

- ▶ Entering a payment if the customer paid off the balance owed.
- ▶ Transferring the balance to a *Bad Debt* or *Write-Off* account.

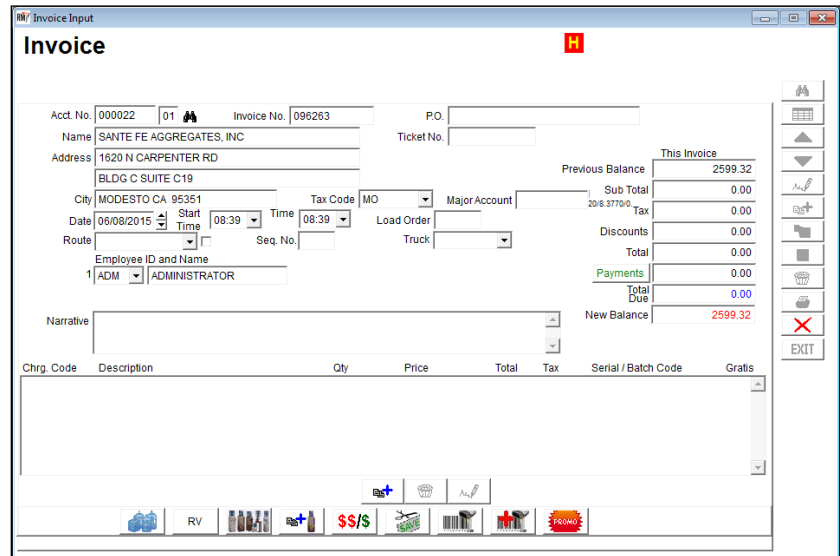
Payment Made

If the customer paid off the account, simply enter a payment for the amount received.

Write-Off

If there was no payment by the customer to reconcile their balance due, you will need to create a bad debt or write-off invoice within the *Invoices and Adjustments* screen.

To begin, create a new invoice for the customer that is terminating service within *Transactions > Invoices and Adjustments*.



Invoice Input

Invoice

Acct. No. 000022 01 Invoice No. 096263 P.O. Ticket No.

Name SANTE FE AGGREGATES, INC

Address 1620 N CARPENTER RD

City MODESTO CA 95351 Tax Code MO Major Account

Date 06/09/2015 Start Time 08:39 Time 08:39 Load Order

Route Seq. No. Truck

Employee ID and Name
1 ADM ADMINISTRATOR

Narrative

This Invoice	
Previous Balance	2599.32
Sub Total	0.00
Tax	0.00
Discounts	0.00
Total	0.00
Payments	0.00
Total Due	0.00
New Balance	2599.32


Chrg. Code	Description	Qty	Price	Total	Tax	Serial / Batch Code	Grats

RV Print Save Exit Promo

Enter the *Bad Debt* or *Write-Off* code on the invoice at a quantity of one, and enter the amount as a negative number (below).

NOTE: Create a new Bad Debt or Write-Off code within Lists > Product Codes > Product Charge Codes, if necessary.

Chrg. Code	Description	Qty	Price	Total	Tax	Serial / Batch Code	Gratis
960	WRITE OFFS	1	-2599.32	-2599.32	0.0000		

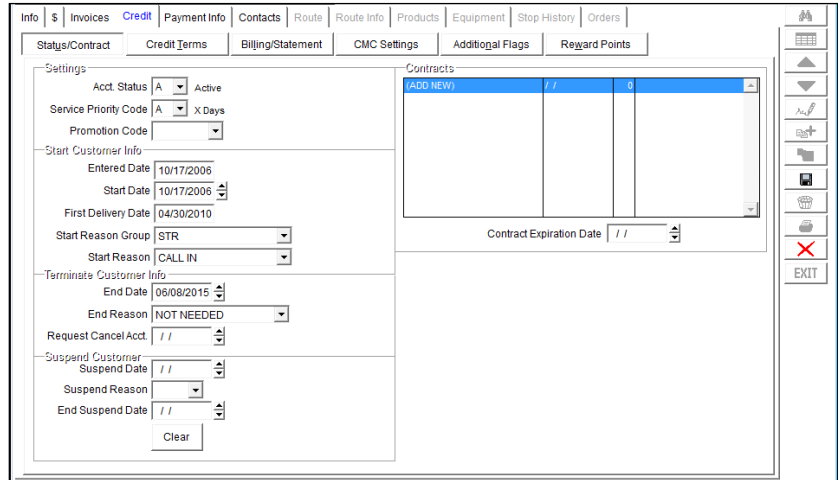


Click **Save** on the invoice, and *Post* the transaction on the account to complete the process.

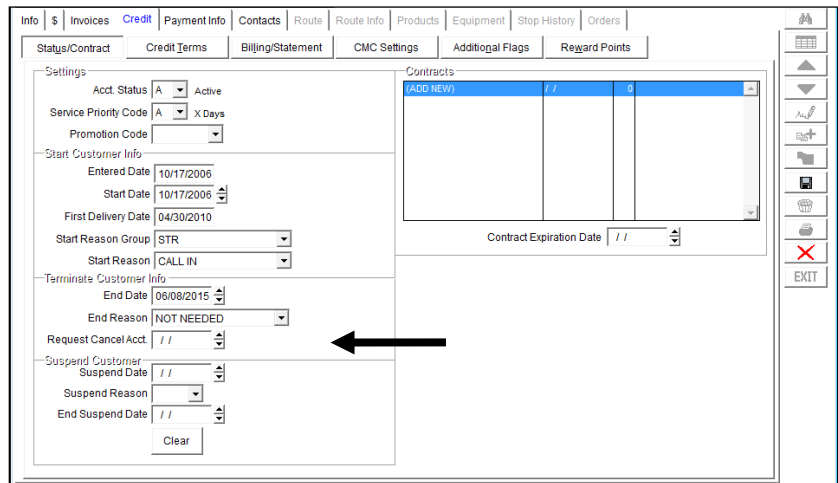
Deactivating the Customer

To deactivate a customer's account, go to *Lists > Customer Information*, and select the customer that is terminating service.

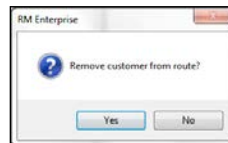
Click on the *Credit* tab and select the **Modify** key.



Under the *Status/Contract* option, enter an 'End Date' and select an 'End Reason' on the screen.



Click **Save** and you will be prompted to remove the customer from route:



Select **Yes** to complete the process. The account will now be flagged as inactive.

Copyright © 1994-2016 by Advantage Route Systems,
Inc. All Rights Reserved.

Printed in the United States of America.

Advantage Route Systems, Inc.

3201 Liberty Square Parkway

Turlock, CA 95380 USA

Phone: 1.209.632.1122

Web Site: www.AdvantageRS.com

Email: info@AdvantageRS.com

Warning

All information in this document and the on-line help system, as well as the software to which it pertains, is proprietary material of Advantage Route Systems, Inc. and is subject to a Route Manager license and non-disclosure agreement. Neither the software nor the documentation may be reproduced in any manner without the prior written permission of Advantage Route Systems, Inc.

Series 7: Version Date, January 27, 2016