

Chapter 3.16: Archiving/Removing Terminated Customers

Overview

The chapter will explain how to archive and remove customers from your system that have become inactive and/or terminated. The customers can be removed from the Route Manager database by archiving and eventually deleting all of their information from the program. This will allow you to permanently remove older accounts that are no longer needed.

Once you have taken this step, reports for customers who have been archived are limited. However, you can still print out a customer list and get basic sales information on the accounts that are archived.

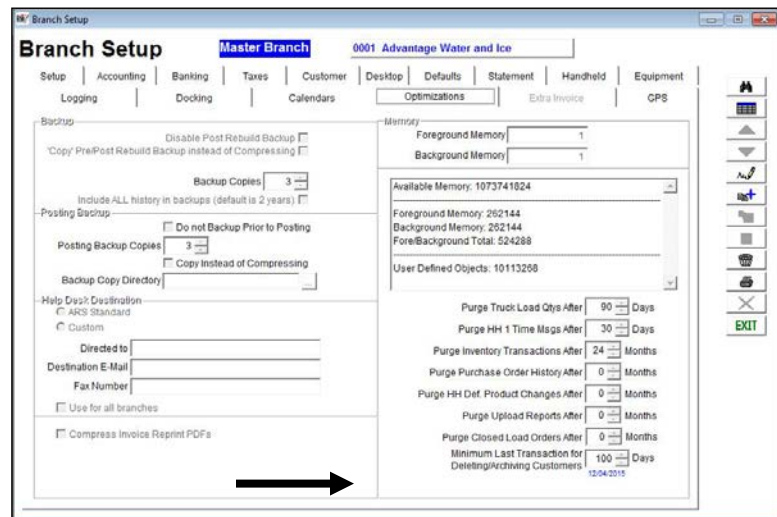
Introduction

Most of the programs that you will need for the Archive customer routines are located under the Tools Menu. Here is a sample menu for you:



Setup

To help assure that you do not prematurely delete any customers with recent transactions, there is a 'Minimum Last Transaction' field that can be adjusted within *File > Branch Setup*, on the *Optimizations* tab. Enter the number of days since each customer's last transaction that you would like the system to observe when archiving accounts within the 'Minimum Last Transaction for Deleting/Archiving Customers' field:



This field will prevent you from accidentally choosing the wrong date when removing customers in the 'Archive Customers' screen. If the operator selects a date later than the one shown, the program will warn the user to return to this screen and change the date. By using this double safety net, it will help reduce the chance of inadvertently running this process on the wrong customers.

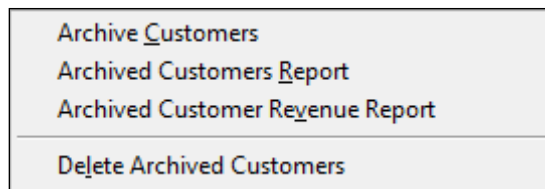
NOTE: The date displayed below the 'Minimum Last Transaction' field represents the last transaction date that will be included when archiving/deleting customers by default.

Archiving Inactive Customers

Archiving customers will remove the account(s) and prevent them from showing up within the Route Manager program. The customer's information is removed and placed into condensed files within the Route Manager directory. Their account information will NOT be permanently deleted until the 'Delete Archived Customers' process is executed.

NOTE: Customers can only be archived if they are inactive (*End Date*) and carry a 0.00 balance on their account.

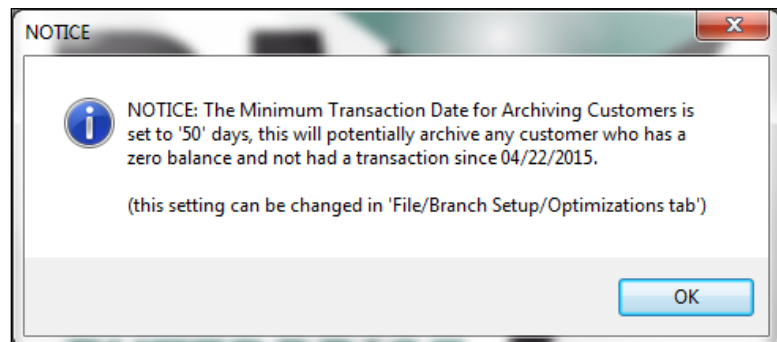
The *Archived Customers* menu can be found under the *Tools* menu within Route Manager:



Archive Customers

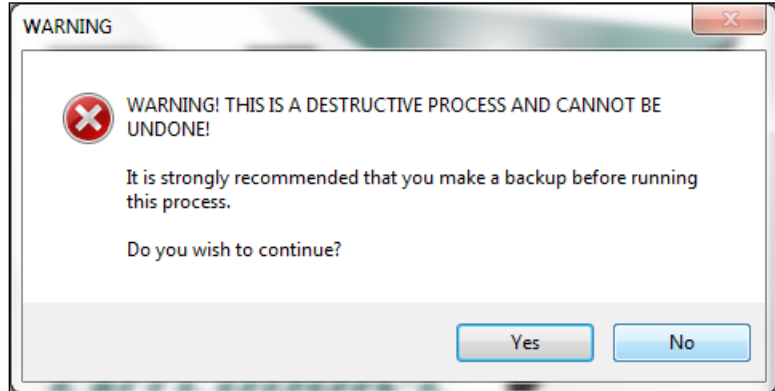
The *Archive Customers* function will remove the customer's information and sales data from the primary display areas and move the information to archive files stored within the Route Manager directory.

When accessing the *Archive Customers* screen you will be prompted with a message that displays the number of days set as the minimum transaction date within *Branch Setup* (covered earlier):

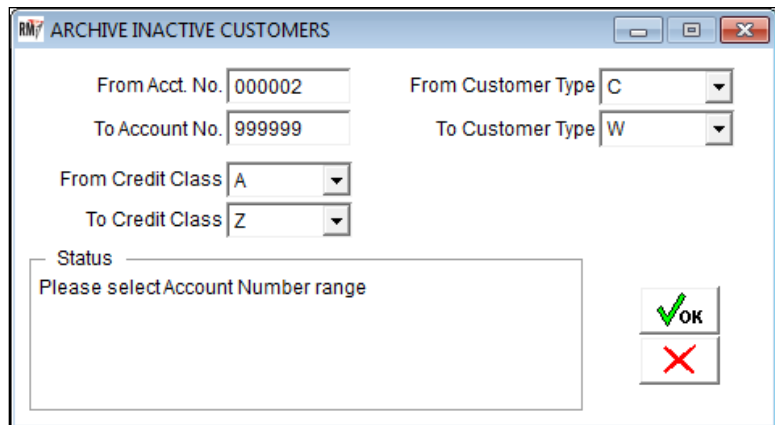


Click *OK* to continue.

The following warning is displayed since this is a permanent process that will remove the accounts from your system. Please ensure that you understand the severity of this process and it is strongly urged that you create a backup prior to continuing.



The *Archive Terminated Customers* process will include all customers whose last transaction occurred before the 'Last Transaction Date' displayed within the screen. You can make adjustments to all of the criteria displayed prior to clicking *OK*.



Click *OK* to continue.

You can include OR exclude any customers that appear in the confirmation list. To do this, double-click on each line to change the value from YES to NO.

Click To Select/de-select

Archive Customers

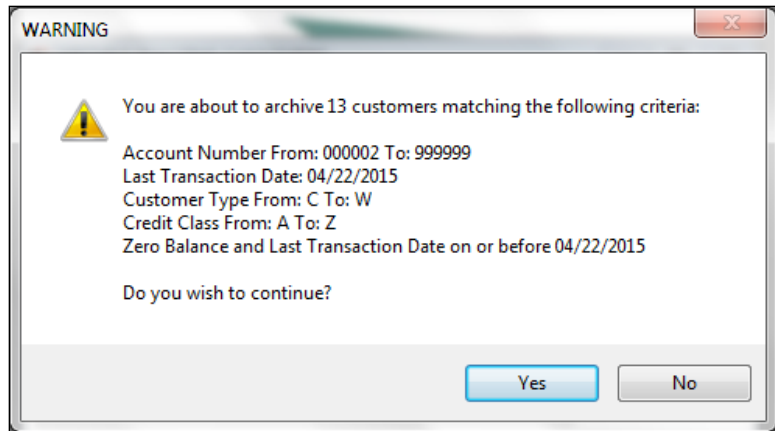
Acct#	Customer Name	Archive	Last Trans.	End Date
000019	MICHAEL DEGRENDELE	YES	03/22/2010	06/08/2015
000044	HORGANS ABSOLUTE WELDING	YES	10/10/2007	05/31/2008
000059	OAK VALLEY AMBULANCE	YES	09/13/2007	09/29/2007
000069	PENSION MANAGEMENT CONSULTANTS	YES	01/20/2009	01/29/2009
000074	INTERNATIONAL PAPER	YES	08/06/2009	09/11/2009
000080	INSULAIR	YES	03/30/2007	04/01/2007
000081	STREAKS SALON	YES	04/17/2008	04/03/2008
000083	PLATINUM FINACIAL GROUP	YES	03/02/2007	06/30/2008
000090	MARY BONALES	YES	10/26/2007	09/28/2008
000097	PAM SAWYER	YES	08/17/2007	10/01/2007
000101	BRIGHT NOW DENTAL	YES	10/12/2007	10/22/2007
000122	EVA'S DYNASTY SALON & SPA	YES	09/24/2008	11/20/2008
000124	CATHEY LATNER	YES	07/31/2009	12/01/2007
000128	INLAND CALIFORNIA CONSTRUCTION	YES	08/28/2009	08/27/2009
000135	CAL-MED	YES	09/30/2009	12/01/2007
000138	ISOM WINERY	YES	07/09/2008	08/06/2008
000145	DEBBIE SOUTHERLAND	YES	12/31/2008	10/01/2008
000146	SABRINA JOHNSON	YES	02/28/2010	05/21/2009

Accounts: 139

Select All Remove All

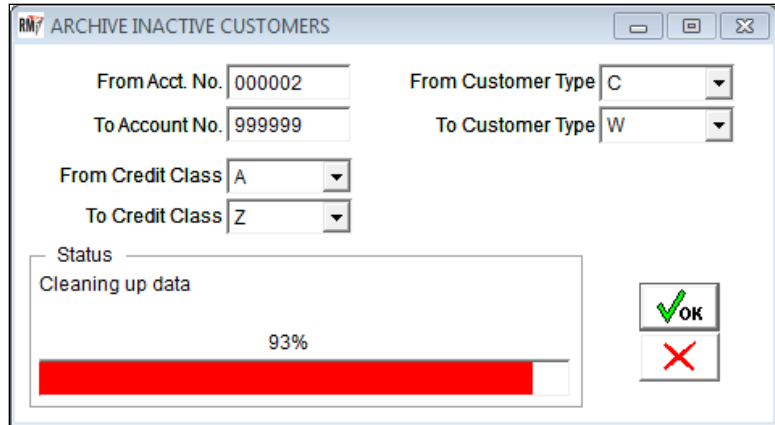
OK

For all customers that have YES next to their name, you will be asked to confirm your intentions to archive them once more:

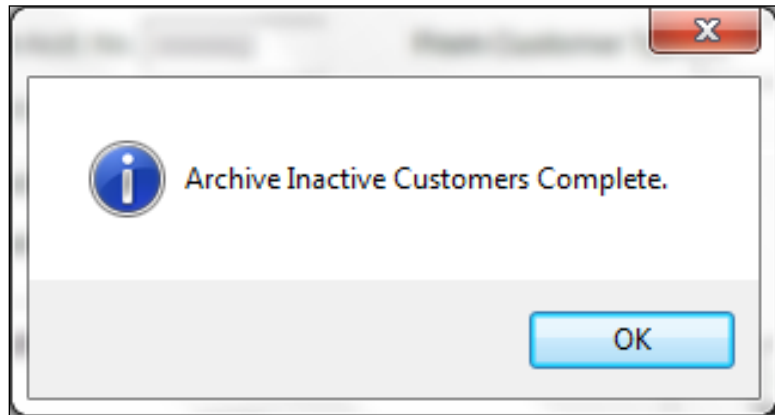


Click Yes to continue or No to cancel the process.

The archiving process will start and you can view the progress on the screen.



Once the process is complete simply click **OK** to the confirmation window:

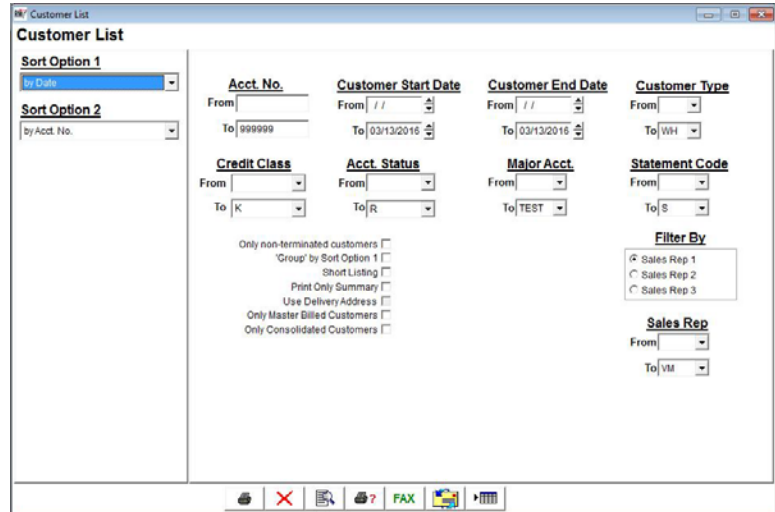


Additionally, you will be provided with a report that lists all of the accounts that were archived which can be printed for your records:

Archive Inactive Customers Report	
Criteria Account Number From: 000000 To: 000100	
Last Transaction Date: 01/11/2013	
Customer Type From: CB To: WO	
Result	
Archived data for customer 000004	
Archived data for customer 000005	
Archived data for customer 000022	
Archived data for customer 000025	
Archived data for customer 000028	
Archived data for customer 000002	
Archived data for customer 000003	

Archived Customers Report

The *Archived Customers Report* is a reference report that will display the accounts that have been placed in archive and are no longer in the active Route Manager program. There are multiple fields of criteria that can be used to produce the desired results:



The screenshot shows a software window titled "Customer List". On the left, there are two "Sort Option" dropdown menus. The first is set to "By Date" and the second to "by Acct. No.". The main area contains several filter sections: "Acct. No." (From: , To: 999999), "Customer Start Date" (From: //, To: 02/13/2016), "Customer End Date" (From: //, To: 02/13/2016), and "Customer Type" (From: , To: WH). Below these are "Credit Class" (From: , To: K), "Acct. Status" (From: , To: R), "Major Acct." (From: , To: TEST), and "Statement Code" (From: , To: S). There are also several checkboxes for filtering, such as "Only non-terminated customers", "Group by Sort Option 1", "Short Listing", "Print Only Summary", "Use Delivery Address", "Only Master Billed Customers", and "Only Consolidated Customers". A "Filter By" section has radio buttons for "Sales Rep 1", "Sales Rep 2", and "Sales Rep 3". At the bottom right, there is a "Sales Rep" section with "From:" and "To: 1/1" dropdowns. The window has a standard Windows-style title bar and a toolbar at the bottom.

Fields:

Sort Option 1 & 2: The primary and secondary fields to sort by. You can choose from the following categories:

- ▶ **By Date**
- ▶ **By Account Number**
- ▶ **By Account Name**
- ▶ **By Customer Type**
- ▶ **By Major Account Code**
- ▶ **By ZIP Code**
- ▶ **By Tax Code**
- ▶ **By Credit Class**
- ▶ **By Statement Code**
- ▶ **By Account Status**

Acct No: Enter the account number range desired.

Customer Start Date: Enter the starting dates for the customers that were archived or double click to select from calendar.

Customer End Date: Enter the ending dates for the customers that were archived or double click to select from calendar.

Customer Type: Select the range of types of customers to be included in the report from the *To* and *From* drop down menus.

Credit Class: Select the range of credit classes to be included in the report from the *To* and *From* drop down menus.

Acct Status: Select the range of account statuses to be included in the report from the *To* and *From* drop down menus.

Major Acct: Select the range of major accounts to be included in the report from the *To* and *From* drop down menus.

Statement Code: Select the range of statement codes to be included in the report from the *To* and *From* drop down menus.

Only Non Terminated Customers: Select this option if you do not wish to include any Terminated Accounts.

'Group' by Sort Option 1: Select this option to group the results based on the Sort Option 1 selection.

Short Listing: Select this option if you do not wish to have any detail on the report.

Print Only Summary: A condensed summary will be printed using only category totals.

Use Delivery Address: Select this option to use the delivery address on the report, and also allows for an extra search criteria filter by Sales Tax Code.

Only Master Billed Customers: Select this option to only show Master Billed accounts on the report.

Only Consolidated Customers: Select this option to only show consolidated customer accounts on the report.

Filter By: Select Sales Rep 1, 2, or 3 for filtering the results.

Sales Rep: Enter any Sales Rep ID's.

Change Branch(s): When in a multi branch environment, this button allows you to change the branch you are running the report for without having to exit the entire report screen.

A sample of the report is shown below according to the criteria that you have selected.

A sample of the report is shown below:

Deleted Customer List

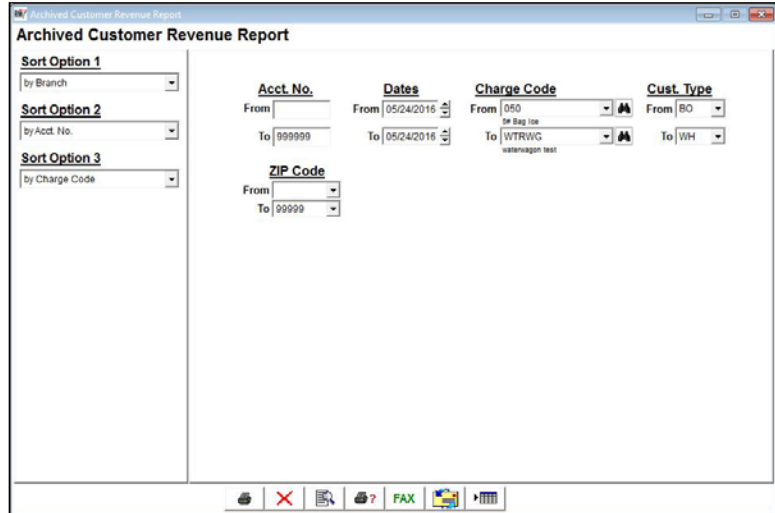
Criteria Acct. No. Range: All == 990000
 Start Date Range: All == 03/13/2016
 End Date Range: All == 03/13/2016
 Type Range: All == 000H
 Sales Rep 1: All == VM
 Credit Class: All == K
 Account Status: All == FI
 Major account: All == TERT
 Statement Code: All == 8

Acct. No.	Contact Information		Credit Information	Start / End
000190	SSN	Name Sam Phone 702-659-8762 E-Mail sdd@ars247.com Fax 209-632-6868	Ext Statement Type N Late Charge G Credit Class C Acct. Status I Price Level Default Credit Limit Unlimited Open Invoice Yes Customer Type CV	Start Date 11/03/2010 Reason 0 End Date 04/04/2012 Reason 0 Sales Rep 1 SP Sales Rep 2 Sales Rep 3
Notes Durango Market Address 6855 N. Durango #1113 Las Vegas, NV 89149				
000285	SSN	Name Alan Phone 702-641-6830 E-Mail mdd@ars247.com Fax 209-632-6868	Ext Statement Type N Late Charge G Credit Class B Acct. Status I Price Level Default Credit Limit Unlimited Open Invoice Yes Customer Type CV	Start Date 11/03/2010 Reason 0 End Date 04/04/2012 Reason 0 Sales Rep 1 SP Sales Rep 2 Sales Rep 3
Notes Jumbo USA Address 99 Cent Dollar 4045 S. Buffalo Dr. Suite A101 Las Vegas, NV 89147				
000328	SSN	Name Eric Phone 702-652-4692 E-Mail erd@ars247.com Fax 209-632-6868	Ext Statement Type N Late Charge G Credit Class C Acct. Status A Price Level Default Credit Limit Unlimited Open Invoice Yes Customer Type RG	Start Date 11/03/2010 Reason 0 End Date 04/04/2012 Reason 0 Sales Rep 1 SP Sales Rep 2 Sales Rep 3
Notes Lalita Cantina Address 6806 S Las Vegas Blvd B207 Las Vegas, NV 89119				
Customers Listed 3 of 3				
Run Date 03/13/2016 13:31 Modified Date 03/13/2016 Advantage Water and Ice By ADM Page 1				

This report will provide you with detailed information on each archived account.

Archived Customers Revenue Report

The *Archived Customers Revenue Report* will display historical sales figures for archived customers. This may be used when you need to look at data several years into the past. While it is not as detailed as standard revenue reports within the system, it can still be helpful to use.



A sample of the report is shown below:

Acct #	Name	ZIP Code			
Archived Customer Revenue Report Criteria: Acct # Range: All Less Than or Equal to 999999 Date Range: 11/22/2000 to 11/22/2004 Chrg Code Range: 105 to 999 Customer Type Range: 01 to 16 Zip Code Range: All Less Than or Equal to V5V3H Branch: CH ,KF ,ME ,MT ,OK ,RD ,RD2 ,TX ,UK ,WV					
Chrg.	Description	Qty	Amount	Gratis Qty	Gratis Amount
Branch: OK					
011108	BROOKLINE INC.			96097	
901	Monthly Feb	6.00	0.00	0	0.00
	Totals	6.00	0.00	0	0.00
011440	REGENCY PARK APARTMENT			96080	
250	5 Gal. Drinking	1.00	6.40	0	0.00
850	Empty Bottle	-2.00	0.00	0	0.00
901	02/04 - 02/04 -	2.00	20.00	0	0.00
	Totals	1.00	26.40	0	0.00
011474	WRIGHT; KEVIN			96048	
250	5 Gal. Drinking	4.00	25.60	0	0.00
850	Empty Bottle	3.00	0.00	0	0.00
901	02/04 - 02/04 -	2.00	0.00	0	0.00
	Totals	9.00	25.60	0	0.00

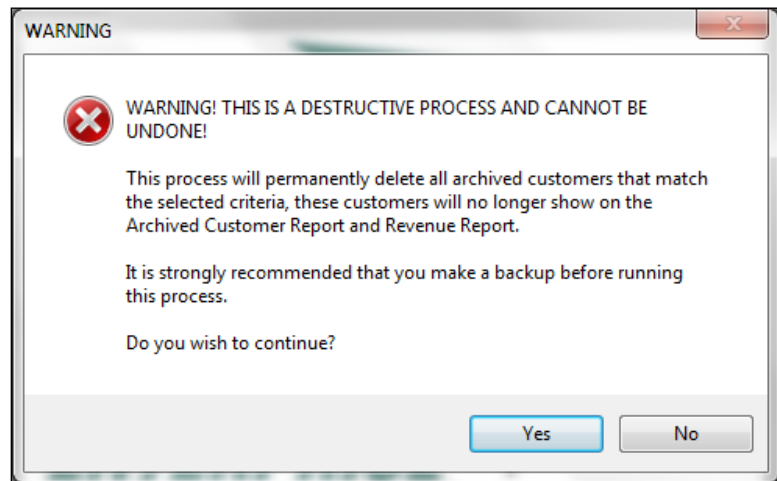
The sales data displayed is related to the archived customer's product purchases.

Delete Archived Customers

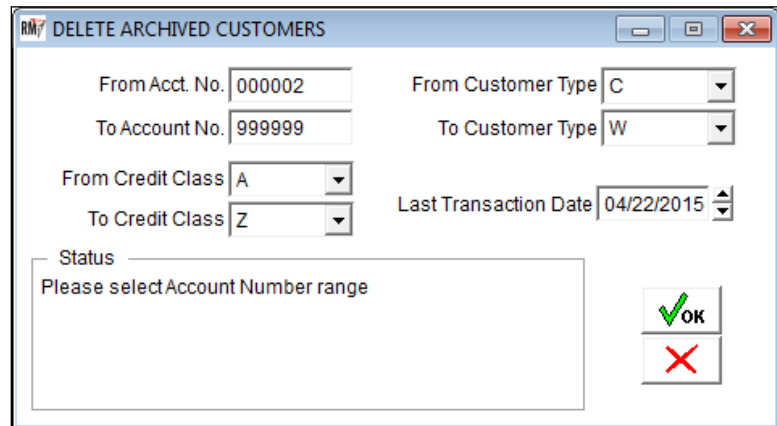
The *Delete Archived Customers* function will permanently erase the archived customer's data from the system and remove any references to the accounts within Route Manager.

NOTE: Performing this process will disable the ability to use the *Archived Customers Reports* covered previously.

The following warning is displayed since this is a permanent process that will remove the accounts from your system completely. Please ensure that you understand the severity of this process and it is strongly urged that you create a backup prior to continuing.

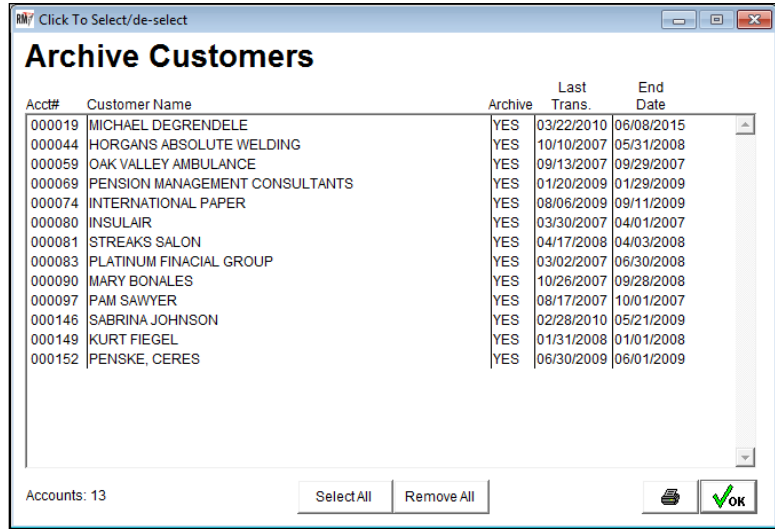


The *Delete Archived Customers* process will include all archived customers whose last transaction occurred before the 'Last Transaction Date' displayed within the screen. You can make adjustments to all of the criteria prior to clicking OK.



Click *OK* to continue.

You can include OR exclude any customers that appear in the confirmation list. To do this, double-click on each line to change the value from YES to NO (below).



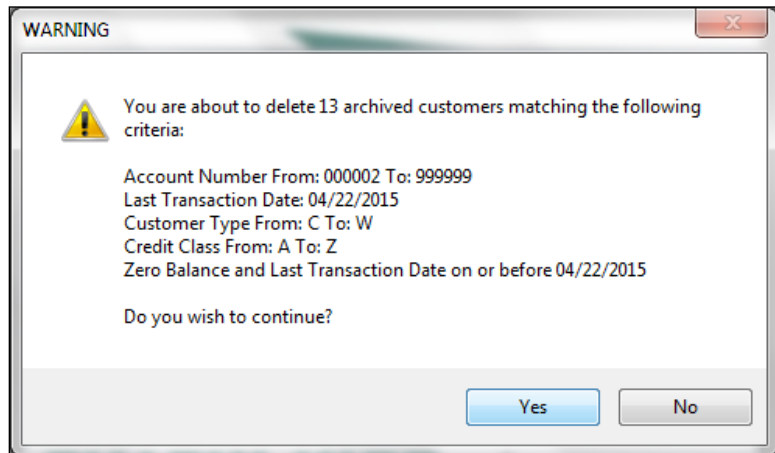
Acct#	Customer Name	Archive	Last Trans.	End Date
000019	MICHAEL DEGRENDELE	YES	03/22/2010	06/08/2015
000044	HORGANS ABSOLUTE WELDING	YES	10/10/2007	05/31/2008
000059	OAK VALLEY AMBULANCE	YES	09/13/2007	09/29/2007
000069	PENSION MANAGEMENT CONSULTANTS	YES	01/20/2009	01/29/2009
000074	INTERNATIONAL PAPER	YES	08/06/2009	09/11/2009
000080	INSULAIR	YES	03/30/2007	04/01/2007
000081	STREAKS SALON	YES	04/17/2008	04/03/2008
000083	PLATINUM FINACIAL GROUP	YES	03/02/2007	06/30/2008
000090	MARY BONALES	YES	10/26/2007	09/28/2008
000097	PAM SAWYER	YES	08/17/2007	10/01/2007
000146	SABRINA JOHNSON	YES	02/28/2010	05/21/2009
000149	KURT FIEGEL	YES	01/31/2008	01/01/2008
000152	PENSKE, CERES	YES	06/30/2009	06/01/2009

Accounts: 13

Select All Remove All

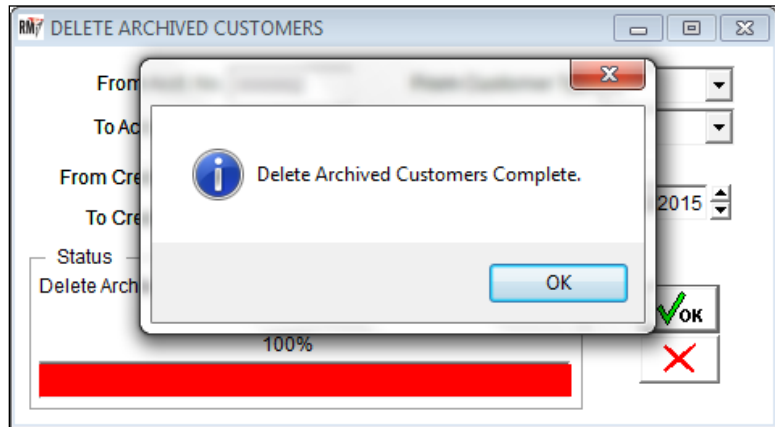
OK

For all customers that have YES next to their name, you will be asked to confirm your intentions to delete them from the archive once more:

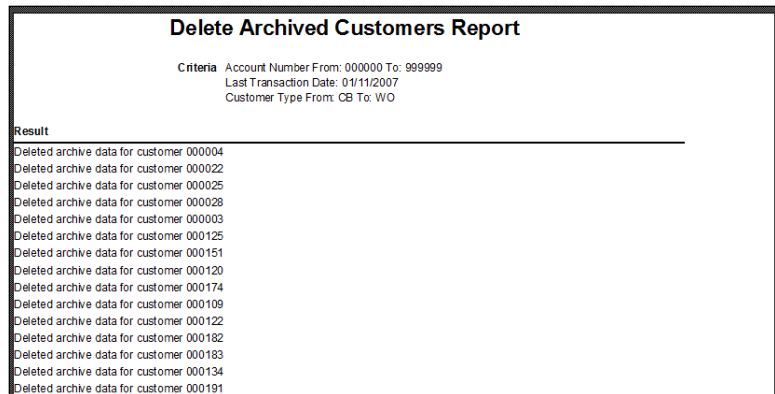


Click Yes to continue or No to cancel the process.

The deletion process will start and you can view the progress on the screen. Once the process is complete simply click **OK** on the confirmation window:



Additionally, you will be provided with a report that lists all of the accounts that were deleted from the archive which can be printed for your records:



Summary

Keeping your data well organized is important. Once a year, you should repeat this task for customers that have been inactive for the last three or four years. By so doing you can speed up your system, keep it lean and focus on accounts that are currently buying products from you.

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