

4.11 Enhanced New Customer Setup

Introduction

The *Enhanced Handheld New Customer* feature allows you to create new accounts while making deliveries on the handheld. By establishing default settings on the desktop, you will now be able to capture important customer data on the handheld and create the customer's account automatically during the *Afternoon Card* process.

Desktop Setup

Before you can use the *Enhanced Handheld New Customer* option on the handheld, new options will need to be configured on the desktop:

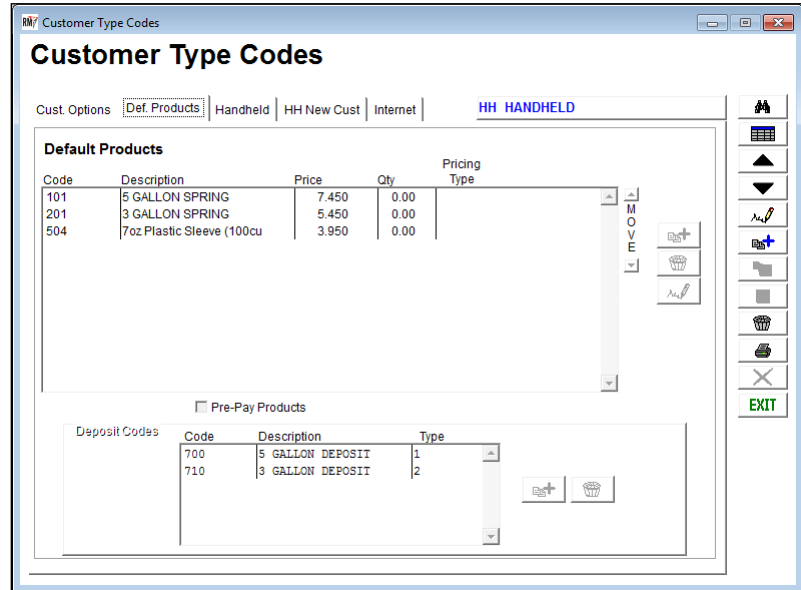
- ▶ ***Customer Type***
- ▶ ***Account Status Codes***
- ▶ ***New Customer Account***
- ▶ ***Handheld Class***

Each item is covered within this section.

Customer Type

A new tab has been added to the *Customer Type Codes* screen that will allow you to establish defaults for the new customer option on the handheld.

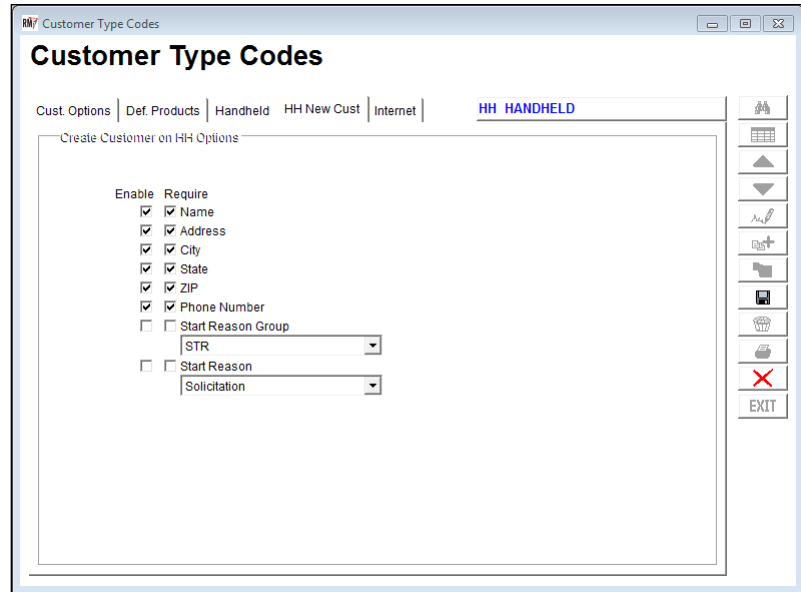
Navigate to *Lists > Customer Setup Codes > Customer Type Codes* and select the **Default Products** tab.



The *Default Products* associated with each type will be assigned to the new account on the handheld at the price and quantity listed. Make any changes as needed for each type.

NOTE: Keep in mind that any changes made here may also affect new accounts created on the desktop.

Next, select the **HH New Customer** tab.



For each field listed, select one of the following:

- ▶ **Enable:** Allows the driver to make an entry in this field on the handheld.
- ▶ **Require:** Forces the driver to make an entry in this field on the handheld.

The *Start Reason Group* and *Start Reason* fields will be used as defaults on the account as it is uploaded and created on the desktop. Assign a default entry to each item.

NOTE: It may be helpful to create a new *Start Group* and *Reason* that reference customer accounts established on the handheld.

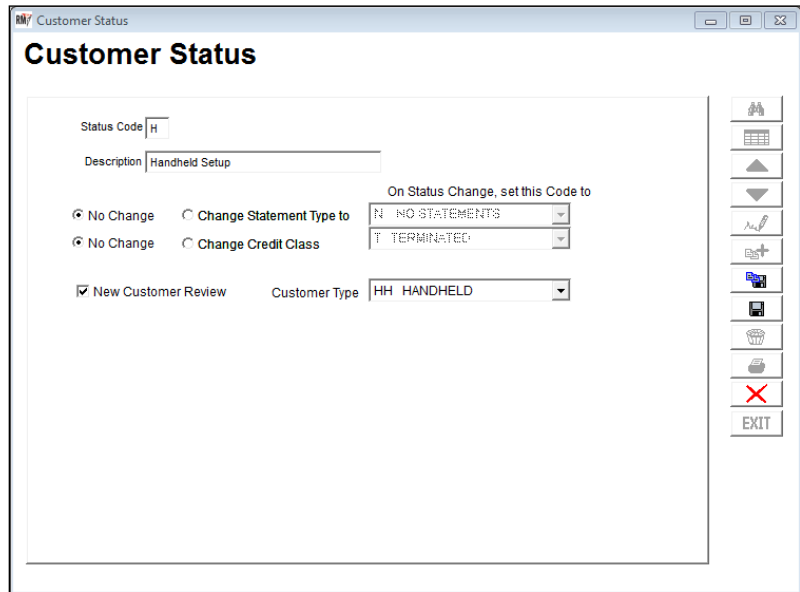
Once you have made your selections, choose the **Save** option and repeat this process for each *Customer Type Code* in the program.

In the next step, a modification will need to be made within each *Handheld Class*.

Account Status Codes

In order to ensure that you have made all of the necessary changes to the account once it has been created, *Account Status Codes* will be used to flag each account created on the handheld with a 'Review' status. This flag will be displayed until the *Account Status Code* has been changed.

Navigate to *Lists > Customer Setup Codes > Customer Status Codes* and create a new code that will be assigned to all accounts established on the handheld (e.g., Handheld Setup).



Select the **New Customer Review** option and **Save** your changes.

NOTE: This item will be covered in detail within the *Daily Processing* section of this document.

New Customer Account

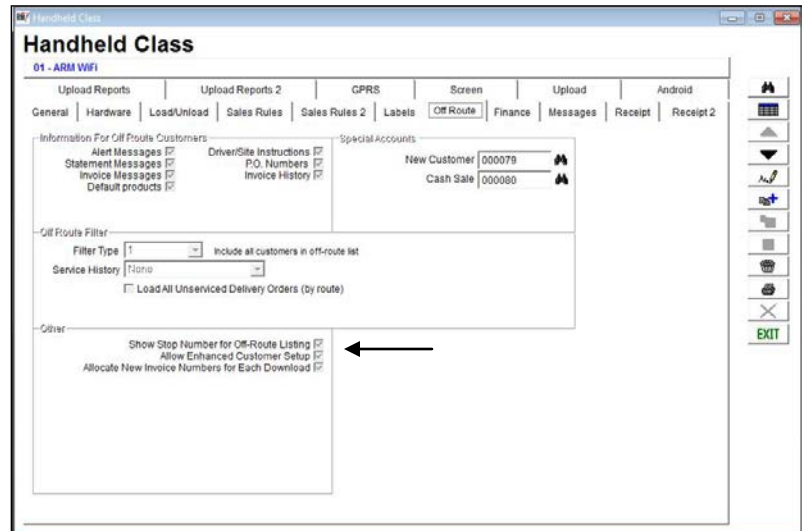
A new account will need to be added to the system to temporarily store the new customer's information when it is captured on the handheld.

Navigate to the New Customer Wizard and enter a generic account to be used for this process. Take note of the account number.

Handheld Class

Each *Handheld Class* that will use the new *Enhanced Handheld Customer Setup* option will need to be modified on the desktop.

Browse to *Lists > Routes > Handheld Class* and choose the **Off-Route** tab.



Select the **Allow Enhanced Customer Setup** option and **Save** your changes. Repeat this step for each *Handheld Class* that will use the new feature.

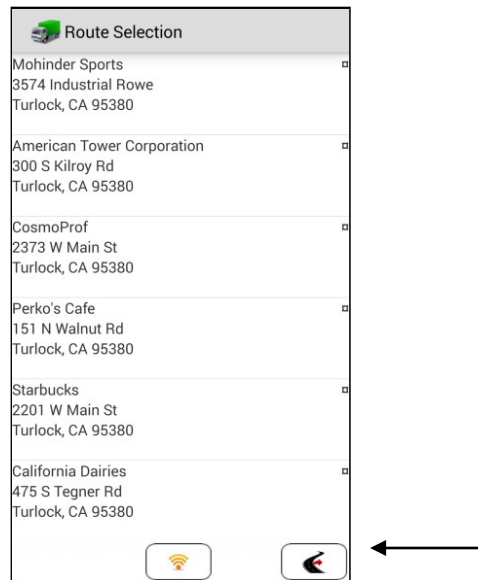
Daily Processing

In this section, we will guide you through the daily process when using the *Enhanced Handheld Customer Setup* option.

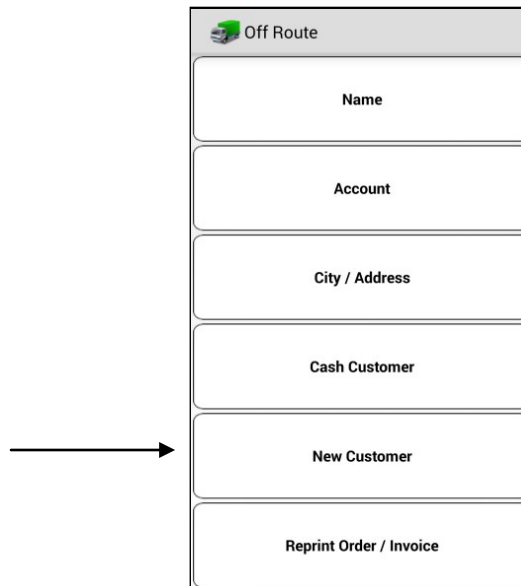
Handheld Processing

Once you have configured all of the setup items covered earlier, create a new *Morning Card* to use the new option on the handheld.

1. Browse to the **Off-Route** menu on the handheld.



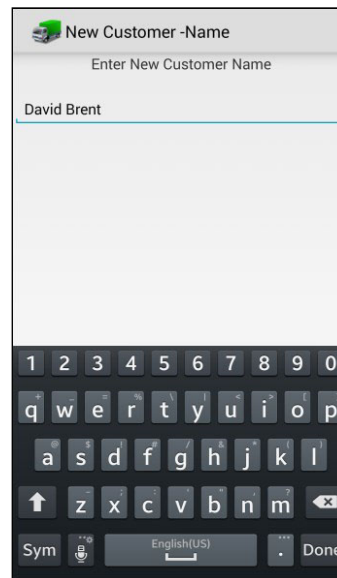
2. Tap on the **New Customer** button.



3. Select the **Customer Type** that you would like to assign to the account and tap **Continue** (green arrow).

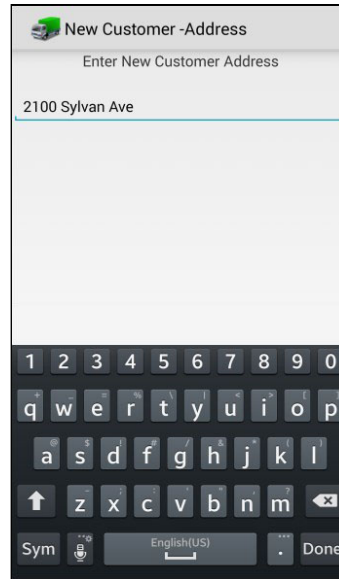


4. Input the customer's billing name and tap **Continue**.



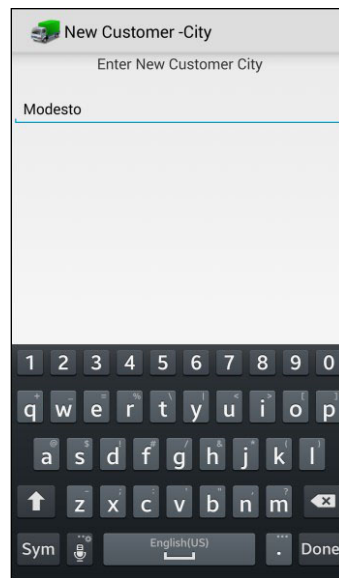
NOTE: Use the back arrow at anytime to make changes or corrections. Remember, the fields displayed during this process are related to the options you have selected within the Customer Type Codes screen on the desktop — every field shown may not be displayed.

5. Input the customer's billing address and tap **Continue**.



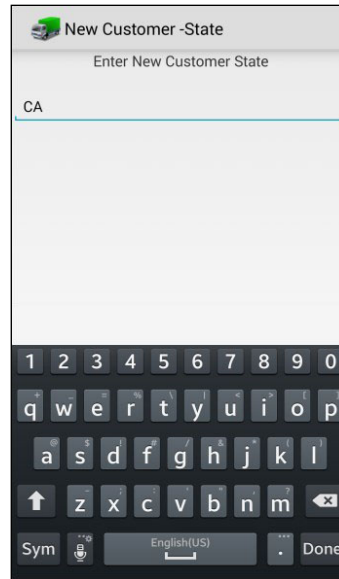
The screenshot shows a mobile application screen titled "New Customer -Address". Below the title is a subtitle "Enter New Customer Address". A text input field contains the text "2100 Sylvan Ave". Below the input field is a standard QWERTY keyboard with a "Done" button at the bottom right.

6. Input the customer's billing city and tap **Continue**.



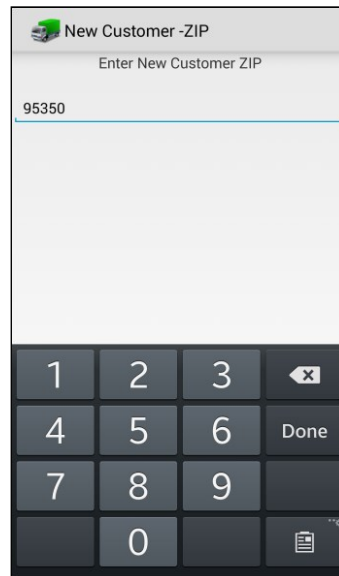
The screenshot shows a mobile application screen titled "New Customer -City". Below the title is a subtitle "Enter New Customer City". A text input field contains the text "Modesto". Below the input field is a standard QWERTY keyboard with a "Done" button at the bottom right.

7. Input the customer's billing state and tap **Continue**.



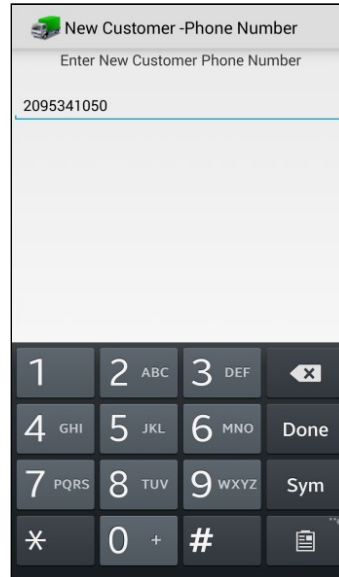
The screenshot shows a mobile application interface for entering customer information. The title bar reads "New Customer -State". Below the title bar, the instruction "Enter New Customer State" is displayed. A text input field contains the value "CA". At the bottom of the screen, a standard QWERTY keyboard is visible, with the "Done" button highlighted.

8. Input the customer's billing ZIP code and tap **Continue**.



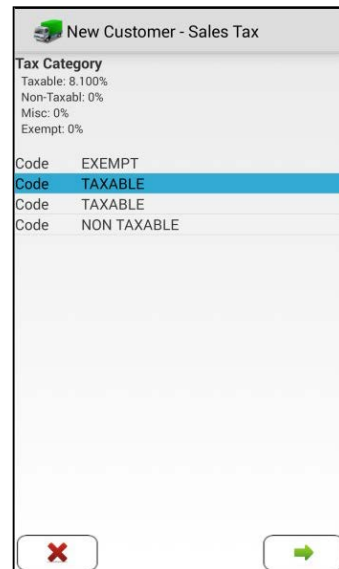
The screenshot shows a mobile application interface for entering customer information. The title bar reads "New Customer -ZIP". Below the title bar, the instruction "Enter New Customer ZIP" is displayed. A text input field contains the value "95350". At the bottom of the screen, a numeric keypad is visible, with the "Done" button highlighted.

- Input the customer's billing phone number and tap **Continue**.



The screenshot shows a mobile application screen titled "New Customer -Phone Number". Below the title is a text input field with the placeholder text "Enter New Customer Phone Number". The field contains the number "2095341050". At the bottom of the screen is a standard numeric keypad with buttons for digits 1-9, *, 0, #, and a "Done" button.

- Select the customer's **Sales Tax Code** and tap **Save**.



The screenshot shows a mobile application screen titled "New Customer - Sales Tax". It displays tax category information: "Taxable: 8.100%", "Non-Taxabl: 0%", "Misc: 0%", and "Exempt: 0%". Below this is a list of tax codes: "Code EXEMPT", "Code TAXABLE" (highlighted in blue), "Code TAXABLE", and "Code NON TAXABLE". At the bottom of the screen are two buttons: a red "X" button on the left and a green right-pointing arrow button on the right.

11. At this point, complete the sale to the customer as normal.

Quick Entry

David Brent
2100 Sylvan Ave

[PAR] 0.00

Line Total: 0.00

New Customer

<Deposit Label / On Hand> 0

Rents: 0.00

Deposits: 0.00

Default Products: 0.00

Miscellaneous Items: 0.00

Sales Tax: 0.00

Invoice Total: 0.00

Payments: 0.00

Account Balance: 0.00

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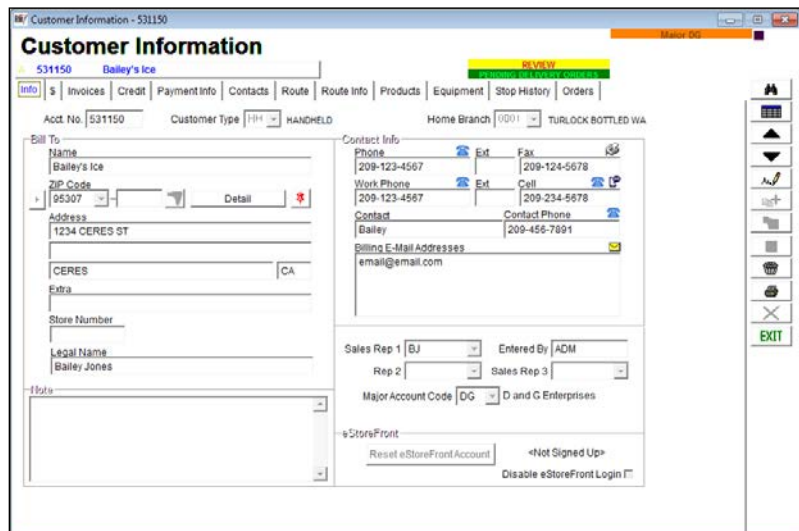
NOTE: If the customer is not purchasing any items, enter a *Skip Reason* on the invoice. If this activity will be required often, it may be helpful to create a new *Skip Reason* on the desktop that will apply to new customers (i.e., New Handheld Customer, etc.)

Desktop Processing

During the *Afternoon Card* process, the **New Customers Report** will automatically print with your existing *Afternoon Reports* — showing any new accounts setup on route.

New Customers Report				
Route : A				
Date : 06/11/2009				
HH Acct#	New Acct#	Acct Name	Address	Tax ID
A 001	000127	DAVID BRENT	1100 SYLVAN AVE. MODESTO 95350 CA	

Each new account will automatically be added to the *Customer Information* screen using the next available account number listed within *Branch Setup*. Each account will be listed with the 'Review' flag on the account (below).



Customer Information

531150 Bailey's Ice REVIEW

Info | Invoices | Credit | Payment Info | Contacts | Route | Route Info | Products | Equipment | Stop History | Orders

Acct. No. 531150 Customer Type [H] HANDHELD Home Branch [001] TURLOCK BOTTLED WA

Bill To: Name: Bailey's Ice, ZIP Code: 95307, Address: 1234 CERES ST, CERES, CA, Extra: Store Number, Legal Name: Bailey Jones

Contact Info: Phone: 209-123-4567, Fax: 209-124-5678, Work Phone: 209-123-4567, Call: 209-234-5678, Contact: Bailey, Contact Phone: 209-456-7891, Billing E-Mail Addresses: email@email.com

Sales Rep 1: BJ, Entered By: ADM, Rep 2: Sales Rep 3, Major Account Code: DG, D and C Enterprises

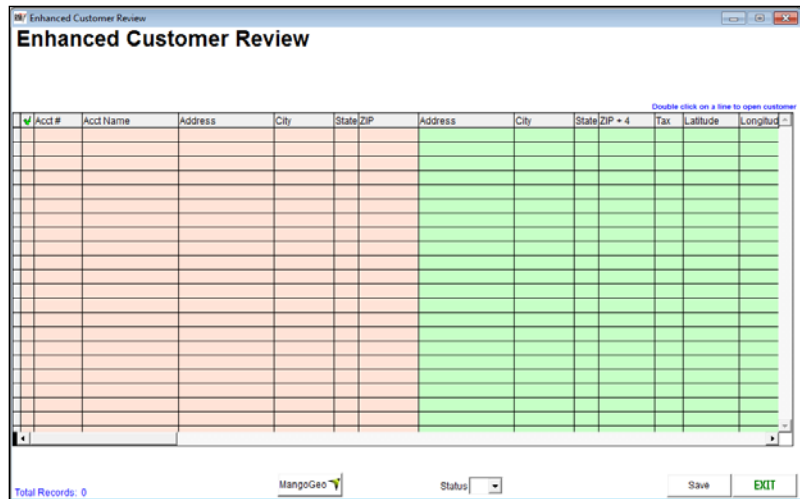
eStoreFront: Reset eStoreFront Account, <Not Signed Up>, Disable eStoreFront Login

To properly complete the required setup on the account, you will use the *New Handheld Customer Review Wizard* covered on the next page.

Enhanced Customer Review


The *Enhanced Customer Review* wizard allows you to complete the setup of each account created on the handheld.

Browse to *Transactions > Enhanced Customer Review*. This screen can be accessed at any time and all new accounts set for 'Review' will be listed.



Double-click on an account listed to access the *Customer Information* screen for editing.

Or,

Select each account by placing a checkmark in the white box shown to the left. Additionally, you may select or deselect the accounts globally by clicking the  box in the header line.

To update the status of each account and remove the assigned 'Review' flag, choose a new *Customer Status Code* from the drop-down list and click the **Save** button.

Summary

The *Enhanced Customer Entry* option provides you with further flexibility and usage on your handheld. If you have any questions regarding this feature, please contact Advantage Route Systems.

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