

Customers

This module is used to collate information about customers, this will include:

Account Reference

Name

Address

Contacts

Locations – multiple addresses against one invoice to account

Delivery Windows - Agreed Days Late and Early (for KPI reporting)

Quotes in the system

Works Orders in the system

Outstanding Deliveries in the system

Delivered Orders Not Invoiced in the system

Part Description changes

Sales History

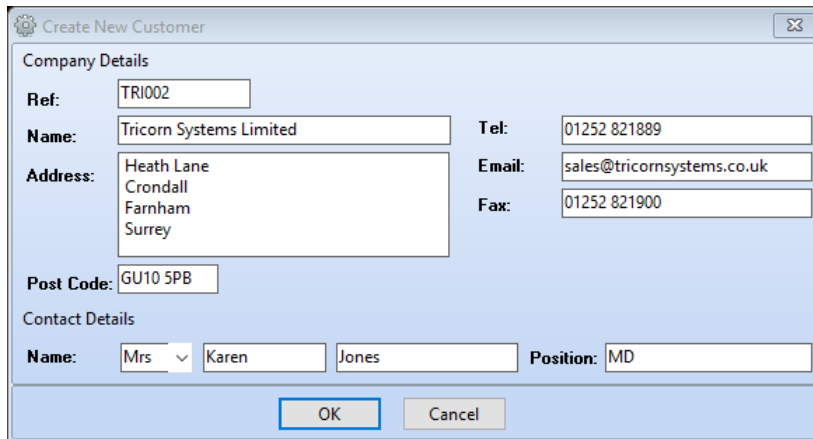
The screenshot displays the 'Customers' module interface. At the top, there are fields for 'Created By:', 'Last Updated By:', and 'Current Owner:', along with a 'Take Ownership' button. Below these are navigation buttons (back, forward, search, etc.) and checkboxes for 'Active Customer?' and 'Approved Customer?'. The main form area contains fields for 'Reference' (TR1001), 'Name' (Tricorn Systems Limited), 'Address' (Oak Park, Heath Lane, Crondall, Farnham), 'Post Code' (GU10 5PB), and 'Country' (GBP). There is also an 'E-Mail' field with 'sales@tricornsystems.co.uk' and a 'Note' field. Below the main form, there are fields for 'Industry', 'VAT No' (123456789), 'Tax Code' (1), 'Currency' (Sterling), 'Always Acknowledge Orders' (checked), 'Terms Code/Desc' (60 /), and 'Credit Limit'. A tabbed interface at the bottom shows 'Locations', 'Contacts', 'Other Data', 'Quotes', 'W/Orders', 'Outstanding Deliveries', 'Delivered Not Invoiced', 'Part Associations', and 'Sales History'. The 'Contacts' tab is active, showing a table of contact details for Tricorn Systems.

Name	Address	Main	Delivery	Invoice	Used for
Tricorn Systems	Oak Park, Heath Lane, Crondall, Farnham GU10 5PB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Main
Tricorn Systems Ltd (del)	45 Station Road, Aldershot, Hants GU11 1BD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deliveries

Customer Address

Creating a new Customer Record

To create a new customer record click the + button in the top navigation bar, New Customer window will open.



The screenshot shows a 'Create New Customer' window with the following fields:

Company Details	
Ref:	TRI002
Name:	Tricorn Systems Limited
Address:	Heath Lane Crondall Farnham Surrey
Post Code:	GU10 5PB
Tel:	01252 821889
Email:	sales@tricornsystems.co.uk
Fax:	01252 821900

Contact Details	
Name:	Mrs Karen Jones
Position:	MD

Buttons: OK, Cancel

Reference – enter the exact account reference as per account package in use, some account packages may not require this as mandatory, please consult Tricorn for further details

Name – enter name of customer

Address – enter address details

Post Code – enter post code details (used as reference to googlemaps)

Tel - enter telephone number

Email - enter email address

Fax - enter fax number

Contact Details

Name – enter name of contact, use drop down for name title

Position – enter the position of contact

Account Status

All new accounts will be automatically activated and approved, however, there are times when a customer needs to have their status changed. Select the Edit button to release the window for adjustments to be made, use the chevron to open the status window.

The image shows two versions of the 'Account Status' window. The left window has a green background and shows 'Active Customer?' and 'Approved Customer?' both checked. The right window has a red background and shows 'Active Customer?' unchecked and 'Approved Customer?' checked. Both windows have an 'Approved Options' section with 'On Stop', 'Allow Works Orders', and 'Allow Quotes' checkboxes, and an 'Approval Notes' text area. An 'Align Approval Status' button is at the bottom right of each window.

Status

Active Customer - all currently active accounts will display in search options

Approved Customer – tick to indicate an approved customer account, non-approved customer accounts will be displayed in search options in red font

Approved Options

On Stop – puts customer account on stop, use this in relation with accounting software

Allow Works Orders – if customer account is on stop can still allow works orders to be created

Allow Quotes – if customer account is on stop can still allow quotes to be created

Approval Notes – additional information can be inserted in this text book

Select Edit ▲ to change details

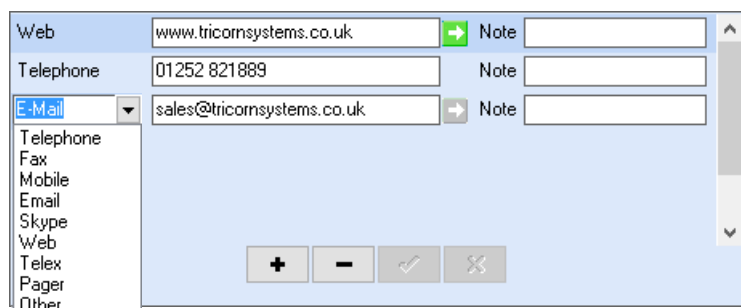
Select Save ✓ to save the entries

Deleting Customer Records

It is not possible to delete a customer record if there are any related records attached, even if loaded in error. Suggest these accounts are put at a status of Inactive and Not Approved, and when using the search list have the tick box for Search for Active Records Only ticked.

Contact Details

Use the + button to add contact details and – to delete contact detail



Use the drop down to select the type of contact. Enter all relevant information, email addresses entered here will be the default used on all email communications, unless there is an email address against the contact name used in orders.

Account Terms

Country – use the drop down menu to enter the international currency code

Industry – the industry the customer trades in can be stored here, these codes are created in Tools – Setup (admin rights required)

Terms – can enter terms for this customer e.g. 30 days. This information can be included on invoices thus each invoice reflects the individual customer terms

Credit – enter any customer credit limit

VAT No – customers VAT number can be inserted here, to include this number on printable documentation this will need to be activated by Tricorn Systems

Tax Code – when invoices are created they automatically default to the default tax/VAT rate as set up in Tools > Setup > VAT Details; to use another Tax Code/VAT Rate for a specific customer enter the relevant Tax Code this code will be used on any invoices created for that customer

Always Acknowledge Orders – tick box to indicate customer requires an acknowledgment of all orders, this is displayed in works orders and will subsequently create confirmation documentation

File Attachments



When creating a customer record, it is possible to attach essential documentation e.g. terms & conditions etc

See [File Attachments](#)

Locations

The location subtab records all addresses relevant to this customer, the address added in the Customer Address section will automatically be displayed. Select the relevant tick box to indicate the **default** for this address, Main, Delivery or Invoice. If the address identified as Main contains an email address this will be treated as the default option for all emails when sending documentation direct from Tricorn.

Locations | Contacts | Other Data | Quotes | W/Orders | Outstanding Deliveries | Delivered Not Invoiced | Part Associations | Sales History

Contact details for Tricorn Systems

Name	Address	-----Defaults-----			Used for
		Main	Delivery	Invoice	
Tricorn Systems	Oak Park,Heath Lane,Crondall,Farnham GU10 5PB	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Main
Tricorn Systems Ltd (del)	45 Station Road,Aldershot,Hants GU11 1BD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deliveries

+ -

Additional addresses can be created using the + button, the Edit Address window will open.

Edit address...

Name: Tricorn Systems	Type: Email	Details: sales@tricornsystems.co.uk	Notes:
Address: Oak Park Heath Lane Crondall Farnham	Type: Mobile	Details: 56858758587	
Postcode: GU10 5PB	Country: GBP		
Use: Main			
Notes:			

+ - ✓ ✕

OK OK & Add Cancel

Insert address details and for contact details click in the region of Telephone where a drop down box will appear, select the form of contact entering the information in the field below, notes can be added if required. Select OK to confirm.

To create further records whilst in this same window, select the OK & Add button, a blank Edit Address window will appear, insert all relevant address/contact as before.

Contacts

The contact subtab records all contacts relevant to this customer, to add a new contact select + where the Edit Contact window will appear.

Locations					
Contacts					
Other Data					
Quotes					
W/Orders					
Outstanding Deliveries					
Delivered Not Invoiced					
Part Associations					
Sales History					
Contact details for Tricom Systems					
Name	Address	Defaults			Used for
		Main	Delivery	Invoice	
Tricom Systems	Oak Park, Heath Lane, Crondall, Farnham GU10 5PB	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Main
Tricom Systems Ltd (del)	45 Station Road, Aldershot, Hants GU11 1BD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deliveries

Insert the contact name, use the + button to add a new record type select the form of contact entering the information in the field below, notes can be added if required. Select OK to confirm.

Name: Tricom Systems

Address: Oak Park
Heath Lane
Crondall
Farnham

Postcode: GU10 5PB **Country:** GBP

Use: Main

Notes:

Type: Email

Details: sales@tricomsystems.co.uk

Notes:

Type: Telephone

Details: 01252 821889


Notes:

+ - ✓ ✕

OK OK & Add Cancel

To create further records whilst in this same window, select the OK & Add button, a blank Edit Contact window will appear, insert all relevant contact detail as before.

Please Note: the email address applied to the Main Contact will override the default email address applied against the location record.

To view the details against an individual contact, use the drop down  button against Contact Details

Contact details for Karen Jones

E-Mail

Note

karenj@tricomsystems.co.uk

Telephone

Note

01252 821889

Other Data

Other Data can be used to identify useful information relating to the customer

The screenshot shows the 'Other Data' tab selected in a menu bar. Below the menu bar, there are several input fields and a 'Delivery Window' section. The 'Sales Identification' field is set to 'Supply Only'. The 'Planner Colour' field is set to a blue color. The 'Priority (scheduler)' field is set to 0. The 'Delivery Window' section has 'Days Early' and 'Days Late' fields, both set to 0. Below these fields, there are two tabs: 'Notes 1' and 'Notes 2 (Rich Text)'. The 'Notes 2 (Rich Text)' tab is active, showing a text area with the following content: 'Useful information can be added here as required, different fonts and colours can be used'. Below this text, there are examples of formatting: 'Fonts' (in a standard font), 'Colours' (in red), 'Embolden, italicized, size and underline' (in bold, italic, size 12, and underlined), 'Bullets can be added' (with a bullet point), and 'Text can be highlighted' (highlighted in yellow).

Sales Identification - Type in the category required, self-learning field

Planner Colour – used to assign a colour for this customer within Tricorn Planning Board

Priority (scheduler) – priority of customer within the scheduler

Notes 1 – type relevant text into field

Notes 2 (Rich Text) – opens Rich Text window. Different fonts, colours, emphasis, bullet point and highlight can be used to customise the information. Double click into the Notes 2 (Rich Text) field to add this info.

The screenshot shows the 'Edit Rich Text' window. It has a menu bar with 'File', 'Edit', 'View', 'Insert', and 'Format'. Below the menu bar is a toolbar with various icons for text formatting. The text area contains the same content as the 'Notes 2 (Rich Text)' field in the previous screenshot: 'Useful information can be added here as required, different fonts and colours can be used'. Below this text, there are examples of formatting: 'Fonts' (in a standard font), 'Colours' (in red), 'Embolden, italicized, size and underline' (in bold, italic, size 12, and underlined), 'Bullets can be added' (with a bullet point), and 'Text can be highlighted' (highlighted in yellow). The window has a status bar at the bottom with the text 'NUM'.

Delivery Window – used to identify delivery tolerances for this customer, enter the number of days for early and late. Used within a KPI report.