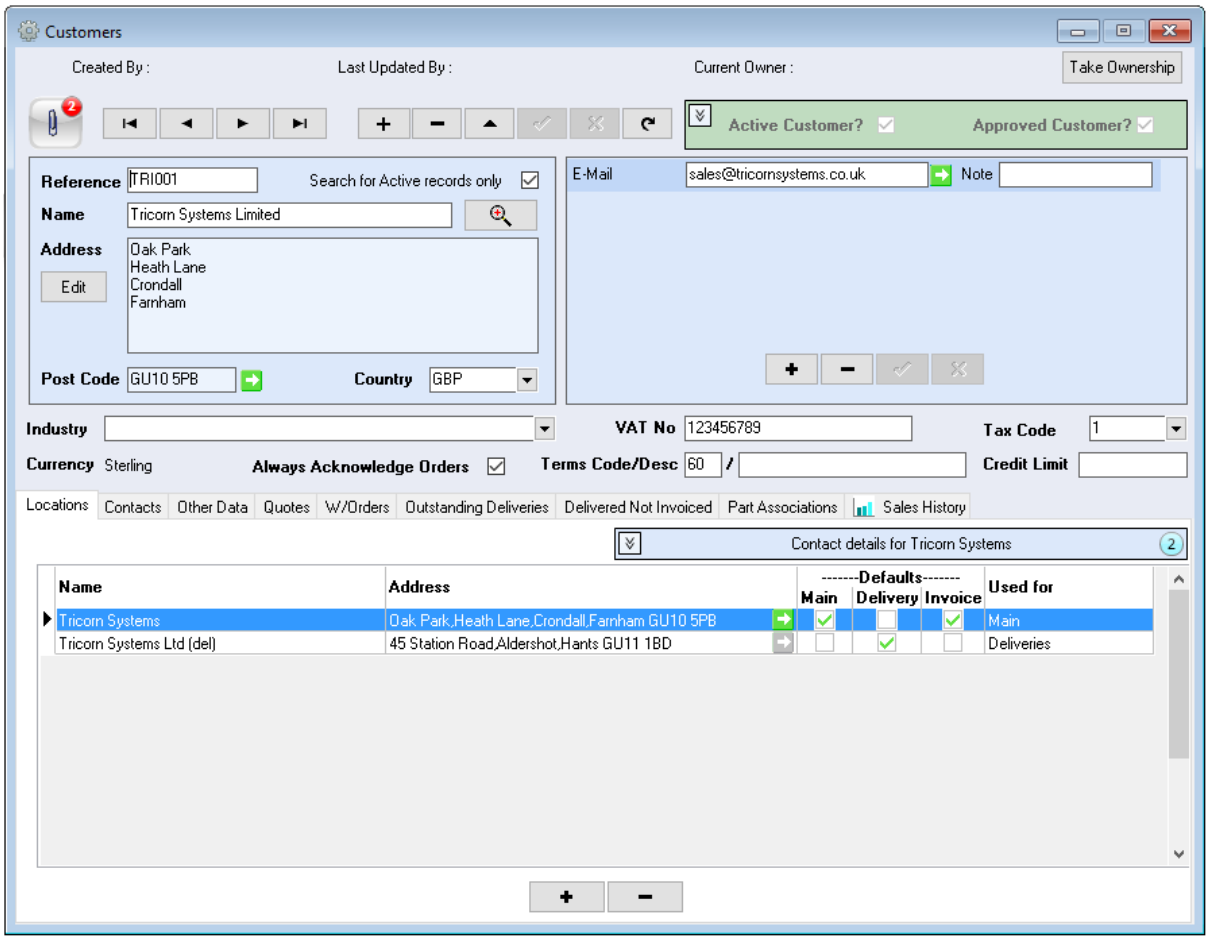
Customers

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

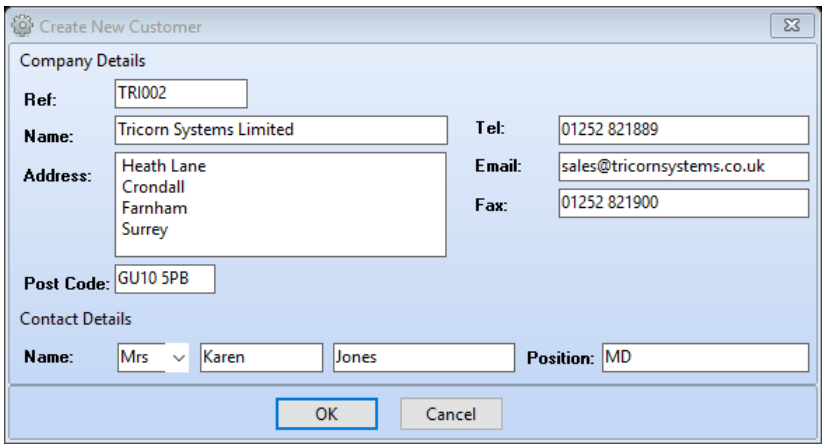
Account Reference
Name
Address
Contacts
Locations – multiple addresses against one invoice to account
Delivery Windows - Agreed Days Late and Early (for KPI reporting)
Quotes in the system
Works Orders in the system
Outstanding Deliveries in the system
Delivered Orders Not Invoiced in the system
Part Description changes
Sales History



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.



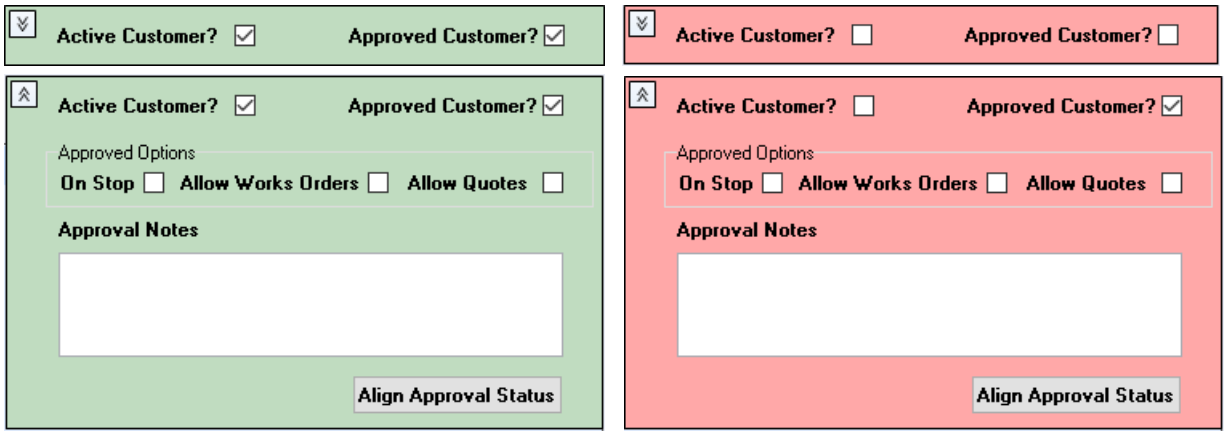
Reference – enter the exact account reference as per account package in use, some account packages may not require this as mandatory, please consult Tricorn for further details
Name – enter name of customer
Address – enter address details
Post Code – enter post code details (used as reference to googlemaps)
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.



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

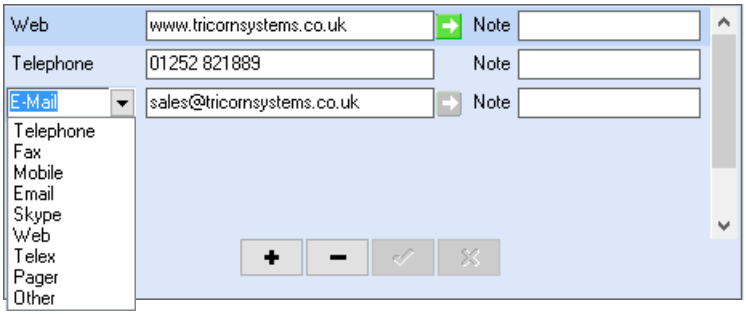
Select Save ✓ to save the entries

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

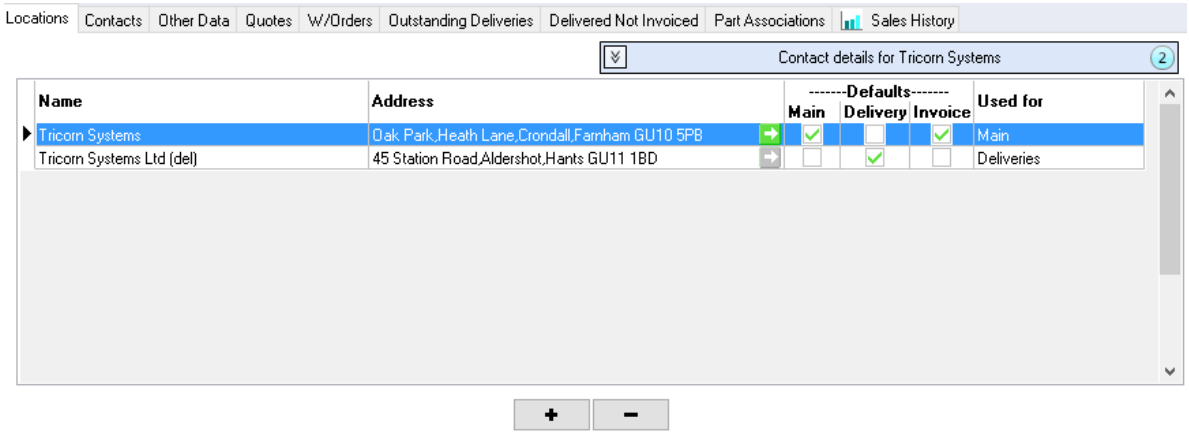
File Attachments

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

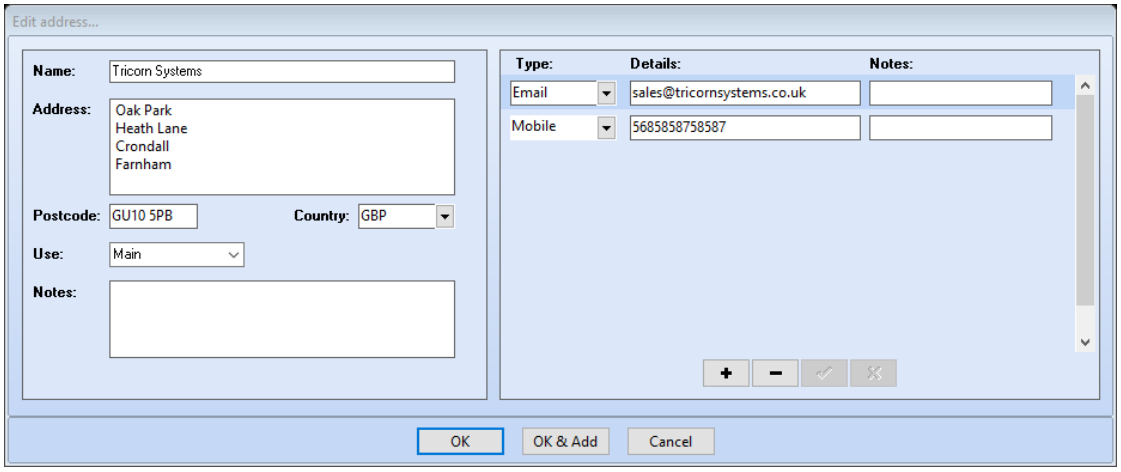
See File Attachments

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.



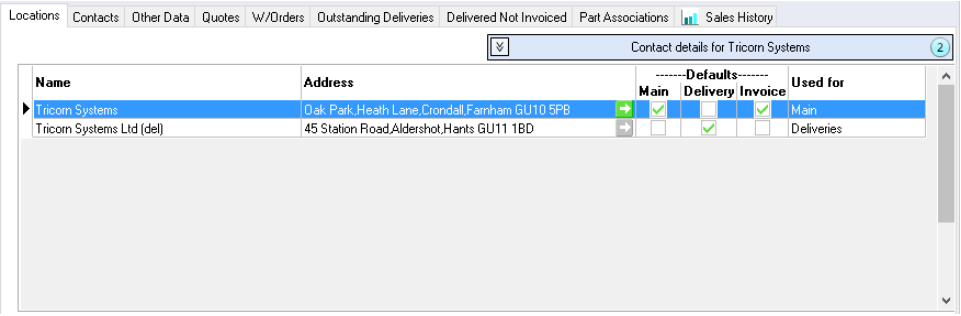
Additional addresses can be created using the **+** button, the Edit Address window will open.



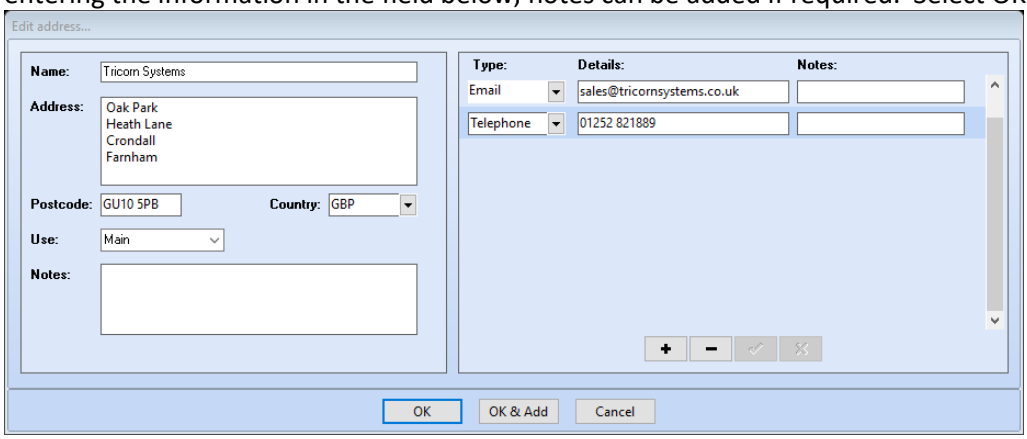
Insert address details and for contact details click in the region of Telephone where a drop down box will appear, select the form of contact entering the information in the field below, notes can be added if required. Select OK to confirm.
To create further records whilst in this same window, select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



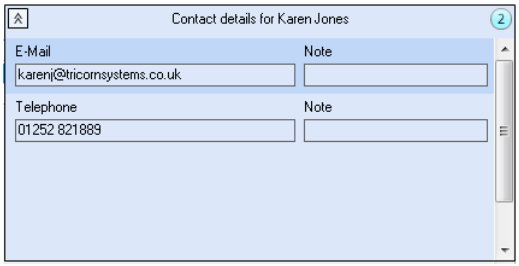
Insert the contact name, use the **+** button to add a new record type select the form of contact entering the information in the field below, notes can be added if required. Select OK to confirm.



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.

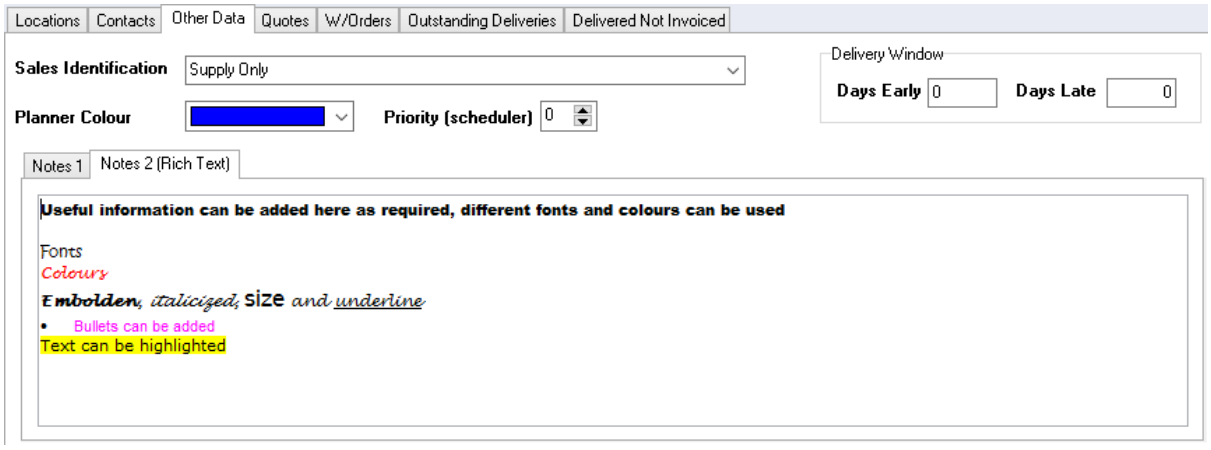
Please Note: the email address applied to the Main Contact will override the default email address applied against the location record.

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



Other Data

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



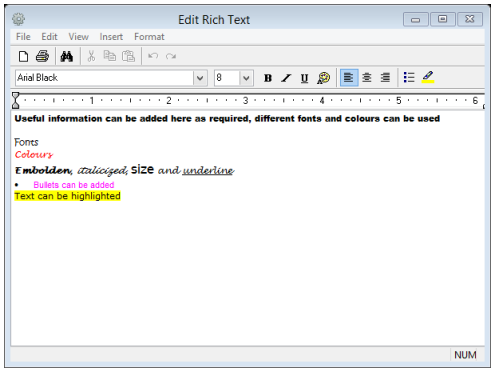
Sales Identification - Type in the category required, self-learning field

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.



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