



## ServiceLedger Getting Started Guides

### Getting Started with the Customer Manager

The Customer Manager allows you to track and manage your customers and prospects in ServiceLedger. From the Customer Manager, you can track customer information, notes, locations, contacts, history and recurring tasks. ServiceLedger requires customers be created for customers prior to creating any quotes, agreements, work orders, or invoices for the customer.

*Note: If you are using either the QuickBooks or Peachtree Accounting Link, you should import your existing customer list from either QuickBooks or Peachtree into ServiceLedger via the link. This is necessary if you plan on transferring invoices from ServiceLedger back to either QuickBooks or Peachtree.*

#### **Creating Customers:**

Customers are the customers or prospects you have created in ServiceLedger and where you will track and manage customer or prospect information.

To create an customer record, click on **Customers | Customers** from the **Navigator** to open your existing **Customer List** to view existing customers you have created in ServiceLedger.

Click on the  **Add New Record** button to add a new customer.

Account - Blackwell, Edward

Close Window Save [Icons] Actions

## Customer 1050

Status: Active

Customer Name: Blackwell, Edward Customer Alerts: Add Alert

Primary Contact: Edward Blackwell

Parent Account: [Dropdown]

Default Site: Main

Default Bill-To: Main

Invoice Terms: Net 10

Details | Notes | History | Locations | Contacts | Price/Rates | Discounts / Markups | Tasks | Custom

**Contact Information**

Address: Edward Blackwell  
431 Hampshire Blvd  
City: Baysore  
State/Prov: CA 94326  
Country: USA



Main Phone: (415)555-3221  
Alt. Phone: 0-  
Fax: 0-  
Website: [Icon]  
Email: eblackwell@samplename.com

**Extended Details**

Type: Client [3rd Party] Priority Level: Medium  
Source: [Dropdown] Payment Method: Collect Payment  
Rep.: [Dropdown] Sales Tax: Tax  
Territory: [Dropdown] Map ID: [Text]  
Trip Charge: \$0.00 Web Password: [Text]

Current: \$0.00 1-30: \$0.00 31-60: \$0.00 61-90: \$0.00 91+: \$0.00 Bal: \$0.00

1. The **Customer Number** is a unique number to identify the customer. You can use the default customer number or change as necessary.
2. The **Customer Name** is the name of the customer.
3. **Primary Contact** is the main contact of the customer. When you add a contact it will create a contact record for the contact.
4. **Parent Customer** is the customer above this customer, hierarchically. Leave blank if you are not using a customer hierarchy. For more information, see our full documentation.
5. **Address** is where you can add the address information for the customer. You can record two lines of address information.
6. **City** is where you enter the city of the customer.
7. **State/Prov** is where you enter the state or province for the customer.
8. To the right of **State/Prov** is where you enter the postal code for the customer.
9. **Main Phone** is where you enter the main phone for the customer.
10. **Alt Phone** is where you can enter an alternate phone for the customer.
11. **Fax** is where you enter the fax for the customer.

12. **Website** is where you enter the website details for the customer. You can click on the  button to launch your browser and view the customer website.
13. **Email** is where you enter the main email address for the customer. You can click on the  button to send an email to the customer.
14. **Type** is where you can select the type of customer. You can add your own types by clicking on the **Type** hyperlink and adding additional types, as necessary.
15. **Status** is where you can add the status of the customer. You can add your own statuses by clicking on the **Status** hyperlink and adding additional statuses.
16. **Source** is where you can select the marketing source for the customer, or how the customer heard about you. This is useful in marketing source tracking.
17. **Rep** is where you can select the user that is responsible for the customer, or sales representative.
18. **Territory** is where you can define the territory for the customer and is used in scheduling.
19. **Priority Level** is where you can define the priority level for the customer and is useful if you want to prioritize your customers.
20. **Payment Method** is where you can define the payment method for the customer and is useful if you want to remind technicians that they need to pick up checks at the time of service or if the customer is okay to invoice.
21. **Sales Tax** is the selected tax rate that will be calculated on jobs or invoices for sales tax purposes.
22. **Trip Charge** is the default charge that will be added to all jobs created for the customer for travel charges.
23. **Map ID** is where you can track cross-streets or other mapping information to allow your technicians to easily find a location.
24. **Web Password** is for the ServiceLedger Customer Web Portal and is where the customer password is stored.
25. Click the **Save** button to save the customer record.

### ***Getting Oriented with the Customer Record:***

The customer record stores all the information on your customers and prospects. Knowing where to find this information is critical when trying to quickly respond to any customer requests. In addition to the **Details** described above when creating customer records, there is so much more you can track in ServiceLedger.

#### Action Buttons:

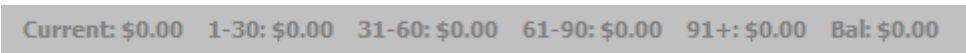
Across the top of the customer record are action buttons that allow you to quickly create transactions for the customer with a click of a button. This time saving step will automatically create the transaction and default it to the customer record

so that you do not have to select the customer record again. Simply click on any action button to create a transaction.



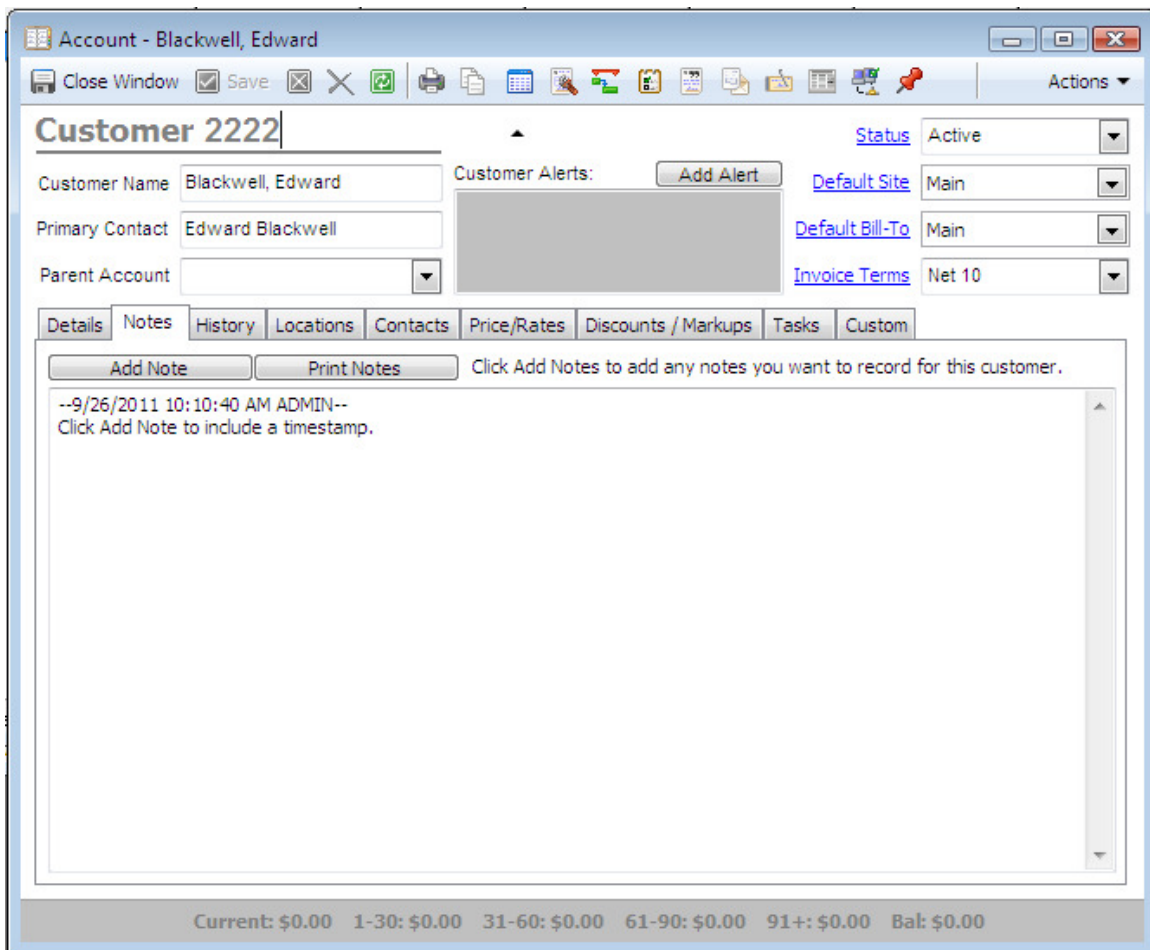
### Customers Receivable Aging:

At the bottom of the customer record is the receivable aging information to allow you to quickly see how much the customer owes you.



### Notes:

The **Notes** tab is where you can store any miscellaneous notes on the customer. You can click on the **Add Note** button to date, time, and user stamp the note.



### History:

The **History** tab is where you can view the history of the customer. Use the **View Type** drop-down box to select the type of history you are looking for like work orders, invoices, quotes, etc. You can double-click on any row to open the transaction record for more details.

Account - Blackwell, Edward

Customer 2222

Customer Name: Blackwell, Edward  
 Primary Contact: Edward Blackwell  
 Parent Account: [Dropdown]

Customer Alerts: [Add Alert]

Status: Active  
 Default Site: Main  
 Default Bill-To: Main  
 Invoice Terms: Net 10

Details | Notes | History | Locations | Contacts | Price/Rates | Discounts / Markups | Tasks | Custom

View Type: Work Orders

W/O #	Client #	Name	Site Number	Type	Priority	Request	Description	Total	St
1014	2222	Blackwell, Edward	Main	Work Order	Medium			\$0.00	Sc
1059	2222	Blackwell, Edward	Main	Work Order	Medium			\$0.00	Sc

Record 1 of 2

Current: \$0.00 1-30: \$0.00 31-60: \$0.00 61-90: \$0.00 91+: \$0.00 Bal: \$0.00

Locations:

The **Locations** tab is where you can view all service locations for any customer. ServiceLedger allows you to store unlimited locations for each customer record. You can add additional locations by clicking on the **Add Location** button (see Creating Customer Locations for more information in this guide). You can double-click on any location record to open it to view information specific to the location record.

Account - Blackwell, Edward

Close Window Save [Icons] Actions

### Customer 2222

Status: Active

Customer Name: Blackwell, Edward    Customer Alerts: Add Alert    Default Site: Main

Primary Contact: Edward Blackwell    Default Bill-To: Main

Parent Account: [Dropdown]    Invoice Terms: Net 10

Details | Notes | History | Locations | **Contacts** | Price/Rates | Discounts / Markups | Tasks | Custom

Add Location    Locations are service sites or billing locations where you do work or send bills.     Show Inactive Locations

Drag a column header here to group by that column

Account Location	Address 1	Address 2	City	State Province	Postal
▶ Main	Edward Blackwell	431 Hampshire Blvd	Bayshore	CA	94326
Ship					

Current: \$0.00    1-30: \$0.00    31-60: \$0.00    61-90: \$0.00    91+: \$0.00    Bal: \$0.00

Contacts:

The **Contacts** tab is where you can store the contacts for the customer. For commercial customers, you may deal with multiple contacts and want to track each one in ServiceLedger. You can click on the Add Contact button to add new contacts (See Creating Customer Contacts in this guide for more information). You can click on any contact record to open the contact record to view the details on the contact.

Account - Blackwell, Edward

Save & Close Save X Actions

### Customer 2222

Customer Name: Blackwell, Edward      Customer Alerts: Add Alert      Status: Active

Primary Contact: Edward Blackwell      Default Site: Main

Parent Account:      Default Bill-To: Main      Invoice Terms: Net 10

Details Notes History Locations **Contacts** Price/Rates Discounts / Markups Tasks Custom

**Add Contact** Keep track of people related to this customer as contacts. You can also add contacts to specific locations.

Drag a column header here to group by that column

Name	Phone	Mobile	Pager	Work
Edward Blackwell	(415)555-3221			
▶ Peggy Blackwell	(415)555-3245			

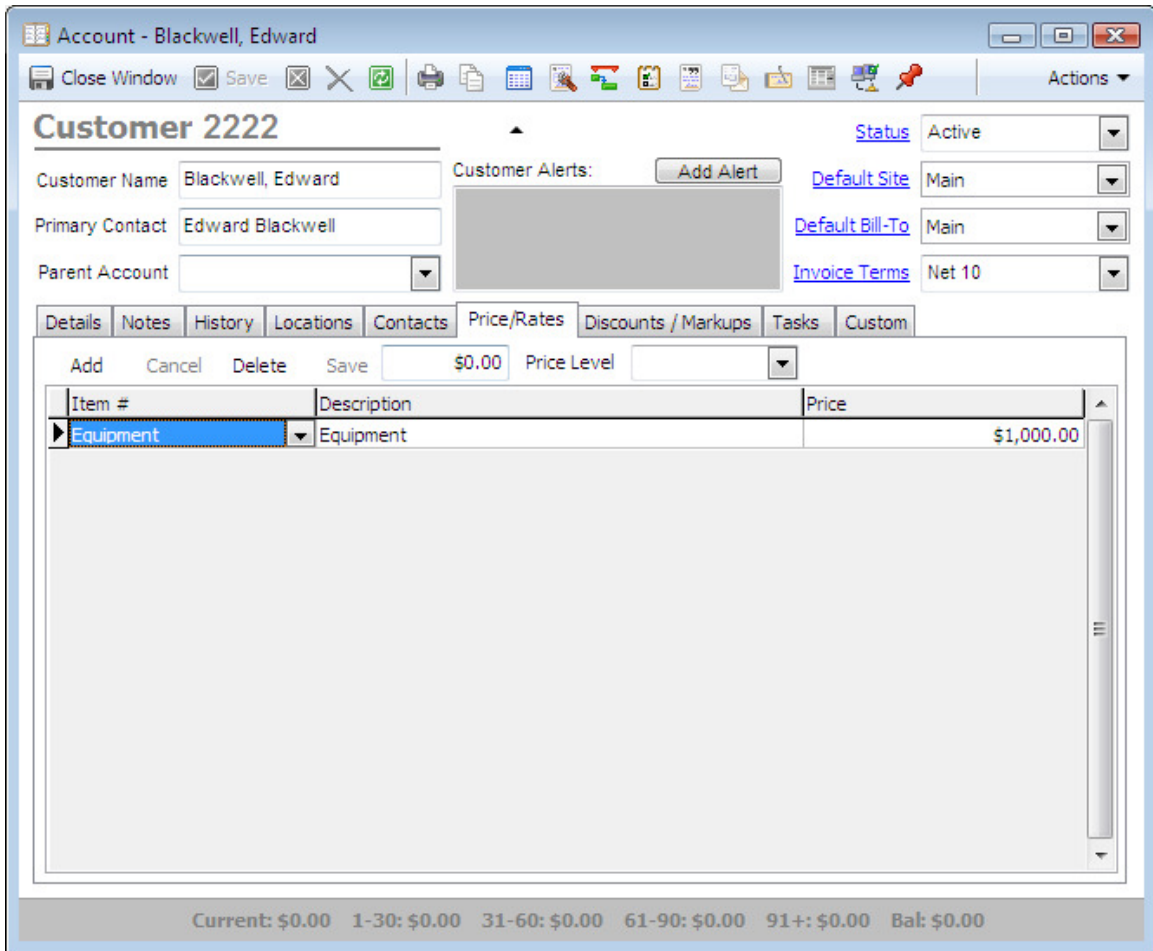
Current: \$0.00 1-30: \$0.00 31-60: \$0.00 61-90: \$0.00 91+: \$0.00 Bal: \$0.00

Price/Rates:

The **Price/Rates** tab is where you can define any special pricing for an customer. This is useful if you have negotiated special pricing and want ServiceLedger to remember the pricing on jobs and invoices.

Click the **Add** button to add a new Price/Rate and update the special price on the **Price** field.

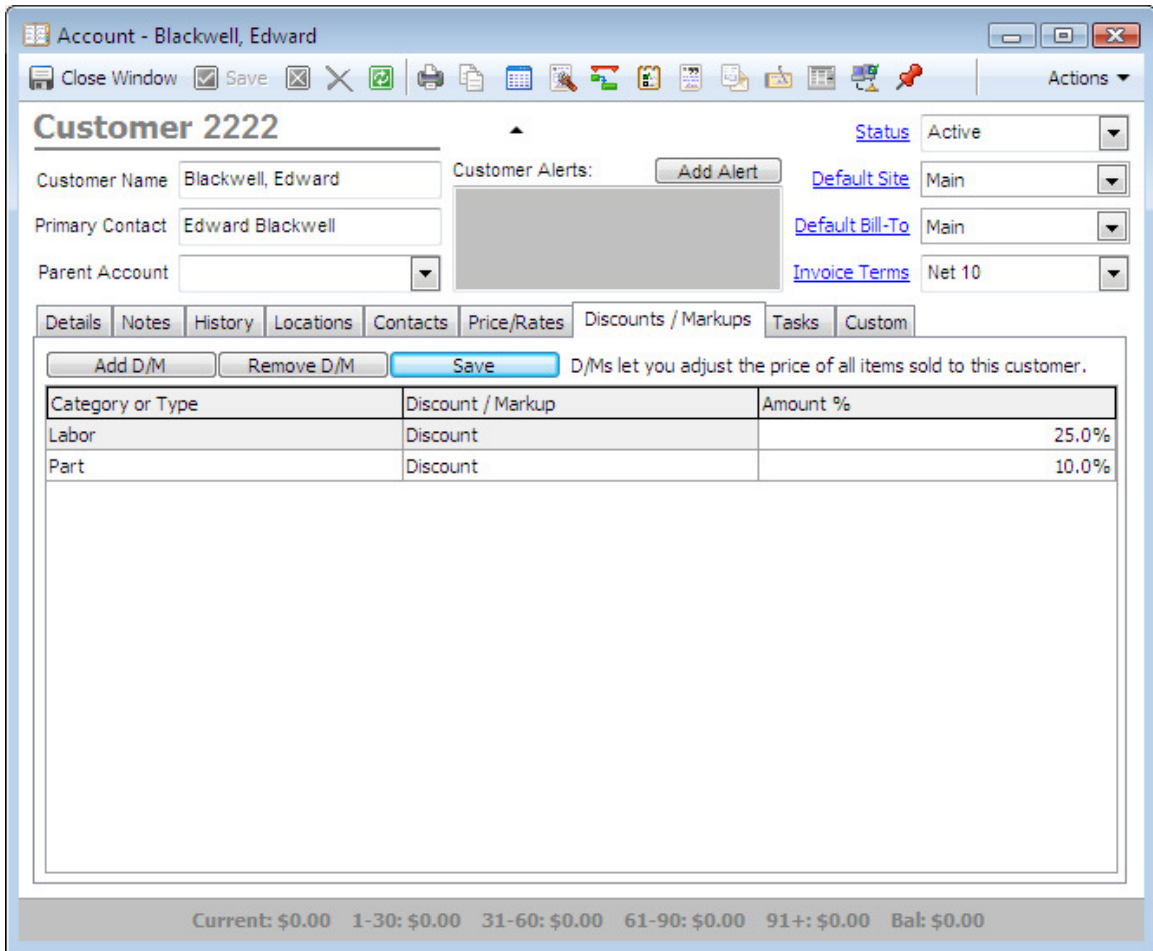




### Discounts/Markups

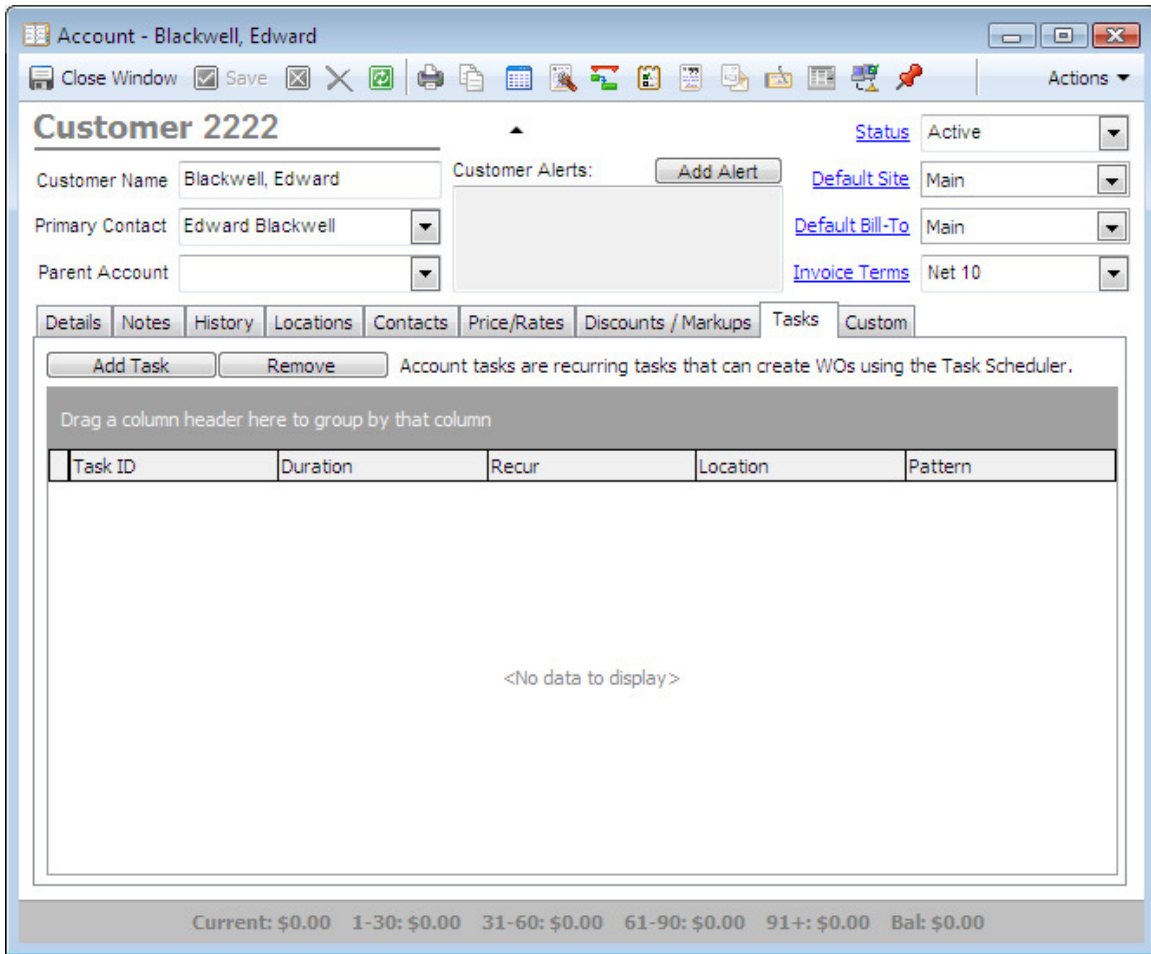
The **Discounts/Markups** tab is where you can adjust the price of all items sold to this customer. You can click the **Add D/M** button to include a discount of markup. You can then select the type of item that you would like adjusted, followed by the type of adjustment, and the percentage that you would like the price adjusted.





Tasks:

The **Tasks** tab is where you can enter any recurring tasks for a customer and is more often used for recurring schedules. You can click on the **Add Task** button to add a new recurring task for an customer (See Getting Started With Tasks for more information on recurring tasks).



### Custom:

The **Custom** tab is where you can store any custom information you choose on customers. You can change the name of any custom field by double-clicking the current field name.

### ***Searching For Customer Records via the Customer List:***

The **Customer List** allows for flexible searching of customer records. You can search for any customer using any field you wish provided the field is updated on the **List View Definition** (contact ServiceLedger Support for information on how you can customize **List View Definitions**).

From the **Customer List**, you can enter the information you want to search for and ServiceLedger will go to that specific row in the database. To search by another column, simply click the column header so that the ▲ is on the column header (on the below example the ▲ is on the Name telling ServiceLedger you are searching by **Customer Name** field.)

Account List

Show Group    Search     Actions ▾

Name	Account #	Status	Address 1	City	State/Prov	Contact	P
Abercrombie, Kristy	1001	Active	5647 Cypress Hill Rd	Bayshore	CA	Kristy Abercro...	(2)
Andres, Cristina	1048	Active	4242 Cypress Hill Rd	Bayshore	CA	Cristina Andres	(2)
Baker, Chris	1002	Active	415 W. Desert Bloom	Bayshore	CA	Chris Baker	(2)
Balak, Mike	1003	Active	8753 S. Mountain View	Bayshore	CA	Mike Balak	(2)
Balak, Mike	1049	Active	1800 Appleseed Ct	Bayshore	CA	Mike Balak	(2)
Barley, Renee	1004	Active	4417 N. Sun Valley Rd	Middlefield	CA	Renee Barley	(2)
Blackwell, Edward	2222	Active	Edward Blackwell	Bayshore	CA	Edward Blac...	(2)
Bolinski, Rafal	1005	Active	1421 Silverbell Ave	East Bayshore	CA	Rafal Bolinski	(2)
Bristol, Sonya	1006	Active	5920 N. Lighthouse	Bayshore	CA	Sonya Bristol	(2)
Burch, Jason	1007	Active	5960 N. Wetmore	Bayshore	CA	Jason Burch	(2)
Burney, Tony	1008	Active	910 S. Ivy	Bayshore	CA	Tony Burney	(2)
Chapman, Natalie	1051	Active	429 Silverbell Ave	East Bayshore	CA	Natalie Chap...	(2)
Charles Smith	1050	Active		Dallas	TX	Charles Smith	(2)
Chekknis, Benjamin	1052	Active	431 Wyatt Ave	East Bayshore	CA	Benjamin Che...	(2)
Cook, Brian	1009	Active	345 Cherry Lane	Middlefield	CA	Brian or Carol	(2)
Corcoran, Carol	1053	Active	7521 W. Vista Del Mar	Middlefield	CA	Carol Corcoran	(2)
Craven, Pam	1010	Active	7105 N. Landon	E. Bayshore	CA	Pam Craven	(2)
Crenshaw, Bob	R3060255	Active	345 Cherry Lane	Middlefield	CA	Bob or Carol	(2)
Crider, Craig	1054	Active	300 Main Street	Bayshore	CA	Craig Crider	(2)
Cuddihy, Matthew	1011	Active	8321 S. Flower	E. Bayshore	CA	Matthew Cud...	(2)
DJ's Computers	1055	Active	101 Bayshore Blvd.	Bayshore	CA	Donald Kucs...	(2)

Record 7 of 92. Showing statuses of Active.

## Creating Customer Locations:

Customer Locations are the service locations for an customer. An customer may have one or more customer locations. From any customer record, click on the **Add Location** action button from the main page or the **Add Location** under the **Locations** tab to add a new customer location.

Customer Location

Location #  Status Active

Details Notes History Custom Map Price / Rates

Customer Location Details

Name

Contact  Phone

Address1  Alt Phone

Address2  Fax

City

State/Prov CA   Send only postal code to MapPoint for routes

Country USA

Location Extended Details

Territory  Customer Web Access Requires the ServiceLedger

Trip Charge  \$0.00 Customer Web Portal Add-On

Map ID  Web Login

Sales Tax Tax  Web Password

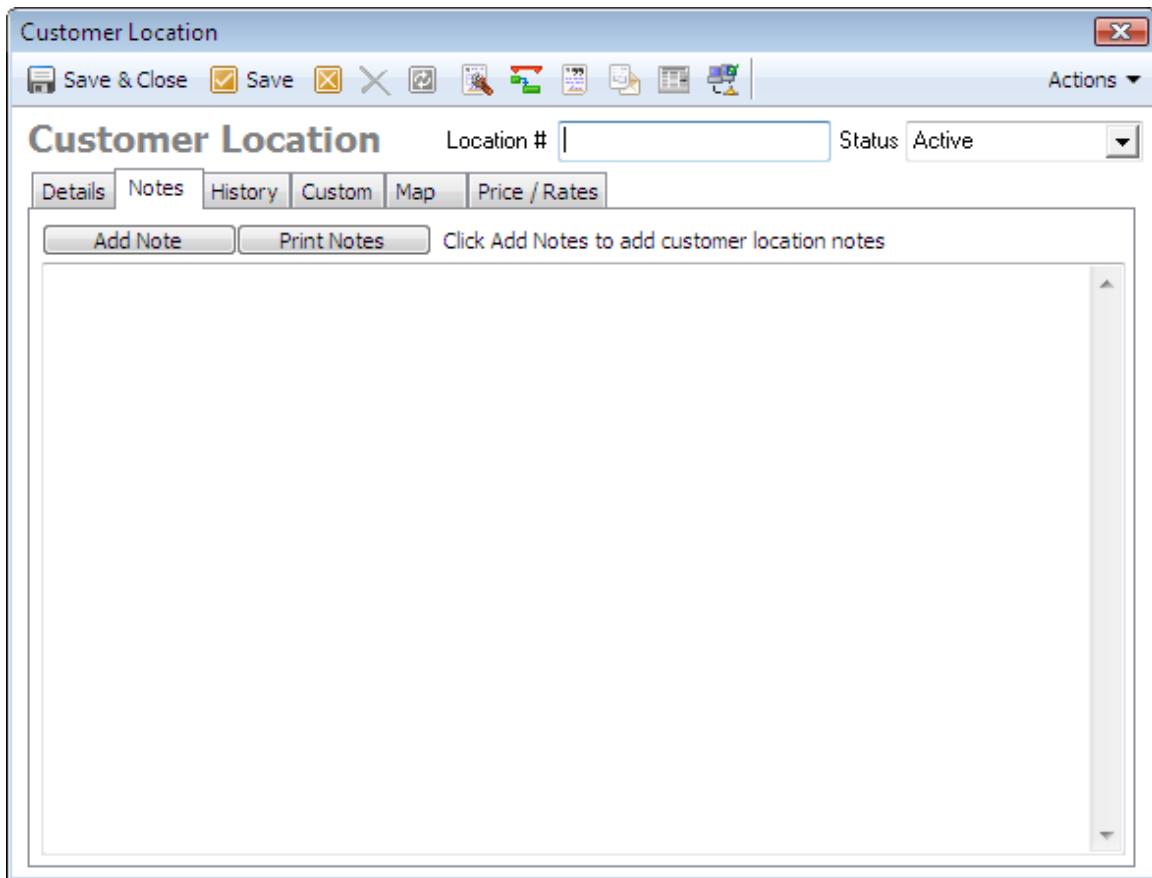
1. Enter a unique **Location #** for the customer location. The **Location #** must be unique for each customer. *Note: An customer location record is always created for the main customer record, however you will not be able to edit the customer location record. If you need to edit the main location, you will need to do it from the customer record, not customer location.*
2. Enter a **Name** for the customer location. By default, it will default to the customer name.
3. Enter a **Contact** for the customer location.
4. Enter the **Address** information for the customer location.
5. Enter the **City** for the customer location.
6. Enter the **State/Prov** for the customer location.
7. Enter the **Postal** for the customer location.
8. Enter the **Phone** for the customer location.
9. Enter the **Alt Phone** for the customer location.
10. Enter the **Fax** for the customer location.
11. Enter the **Territory** for the customer location. Each customer location can have a separate territory from the main location.
12. Enter the **Map ID** for the customer location. Map ID is where you can track cross-streets or other mapping information.
13. Enter the **Trip Charge** for the customer location.

14. Enter the **Sales Tax** for the customer location. Each customer location can have a separate tax rate calculated for sales taxes from the main location.
15. Click the **Save** button to save the customer location record.

***Getting Oriented with Customer Locations:***

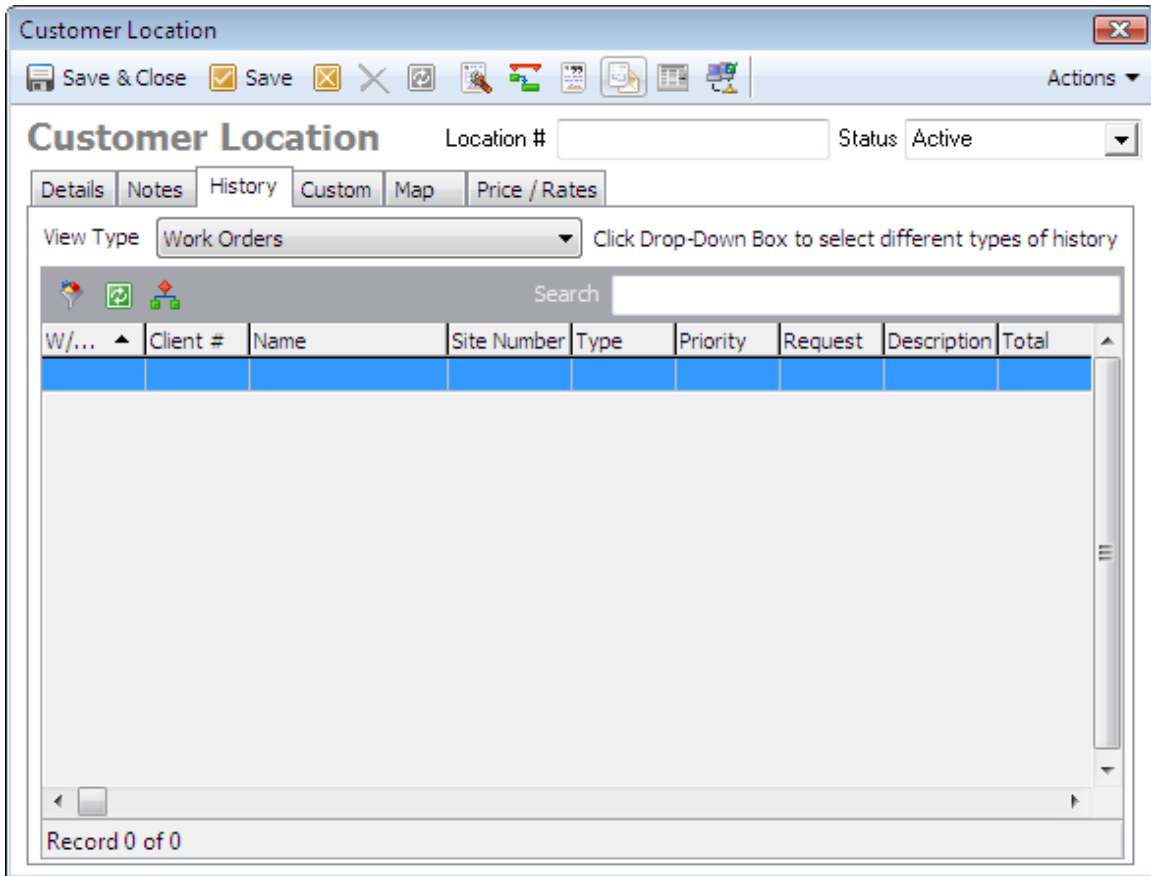
Notes:

The **Notes** tab is where you can store any miscellaneous notes on the customer location.



History:

The **History** tab is where you can view the history related to the specific customer location.



### Custom:

The **Custom** tab is where you can store custom information on the customer location.

### Map:

The **Map** tab is where you can store a map image pulled from Microsoft MapPoint of where the customer location is located on a map. You must have purchased the MapPoint Link to take advantage of this feature.

### ***Searching for Customer Locations via the Customer Location List:***

Like the **Customer List**, you can search for Customer Locations via the **Customer Location List**. This is useful if you want to pull up the customer location record instead of the customer record. To search by customer locations, click on **Customers | Locations** from the **Navigator** to view your existing locations and search.

### **Creating Customer Contacts:**

Customer Contacts are the contacts you deal with at any customer or prospect customer. You can store separate contact records for each contact so that you can separate notes for each. From any customer record, click on the **Add Contact** action button or **Add Contact** from the **Contacts** tab to add a new contact record.

Account Contacts

Save & Close Save X X

### Account Contacts

Customer Contact Details

Account Name  Phone

Contact Name  Mobile

Address 1  Pager

Address 2  Work

City  Fax

State/Prov CA Postal  Web Login

Email  Web Password

Contact Notes

Add Note

1. Enter the **Contact Name** of the contact.
2. Enter the **Address** information for the contact.
3. Enter the **City** for the contact.
4. Enter the **State/Prov** for the contact.
5. Enter the **Postal** for the contact.
6. Enter the **Phone** number for the contact.
7. Enter the **Mobile** number for the contact.
8. Enter the **Pager** number for the contact.
9. Enter the **Work** number for the contact.
10. Enter the **Email** address for the contact.
11. Enter the **Web Password** for the contact.

### ***Searching for Customer Contacts via the Customer Contact List:***

Like the **Customer List**, you can search for customer contacts via the **Customer Contact List**. This is useful if you want to pull up the customer contact record instead of the customer record. To search by customer contacts, click on



**Customers | Contacts** from the **Navigator** to view your existing contacts and search.