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.

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 ![icon] 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 ![icon] 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 having to select the customer record again. Simply click on any action button to create a transaction.
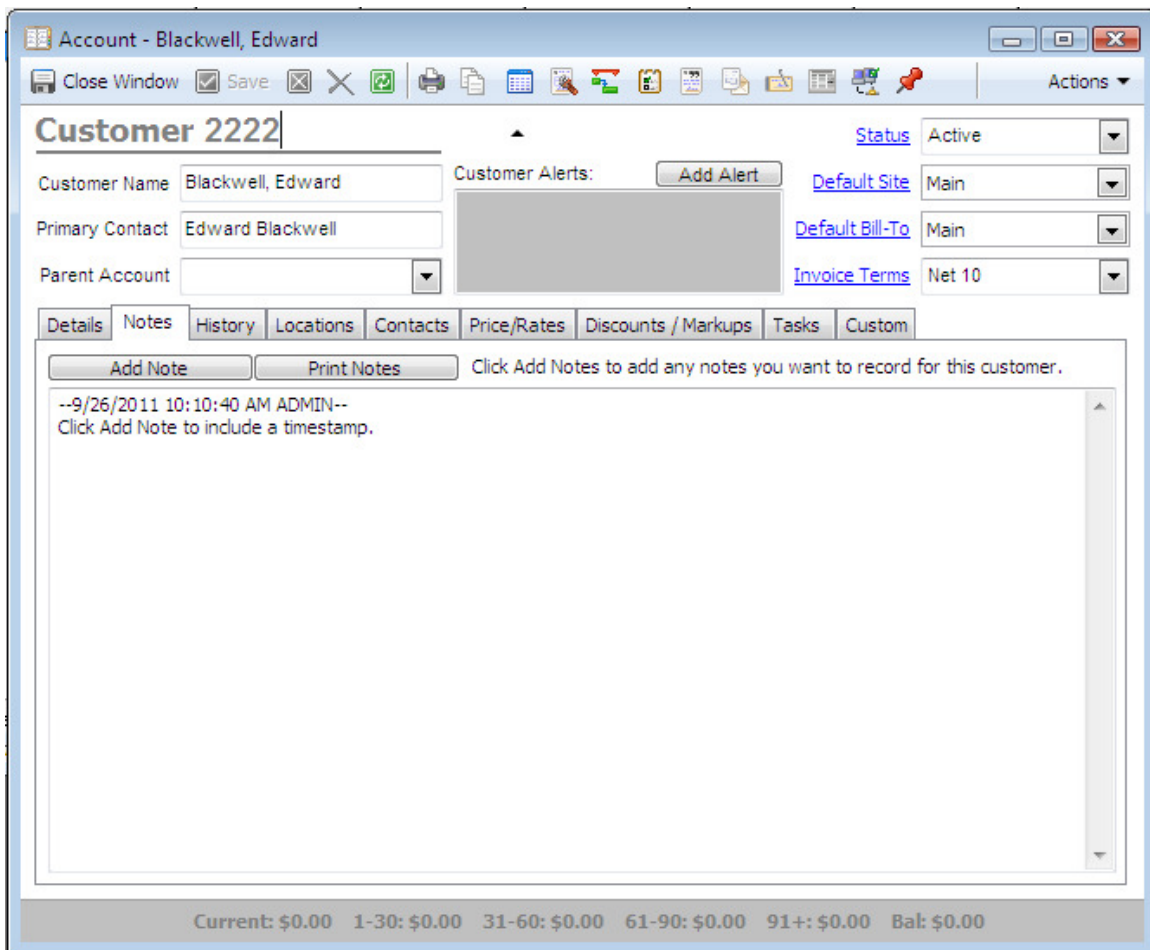

Customers Receivable Aging:

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

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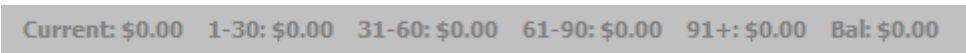
Notes:

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.

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.

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.

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.
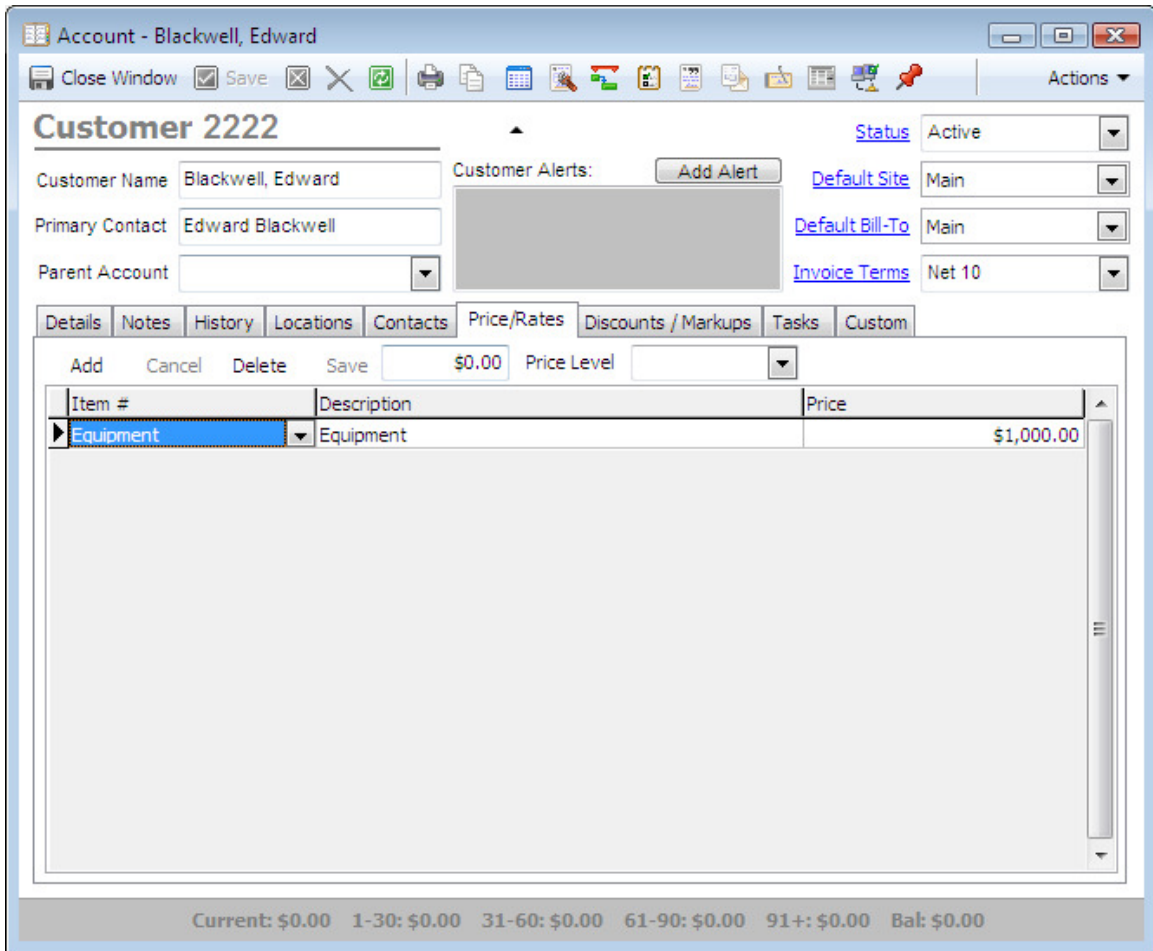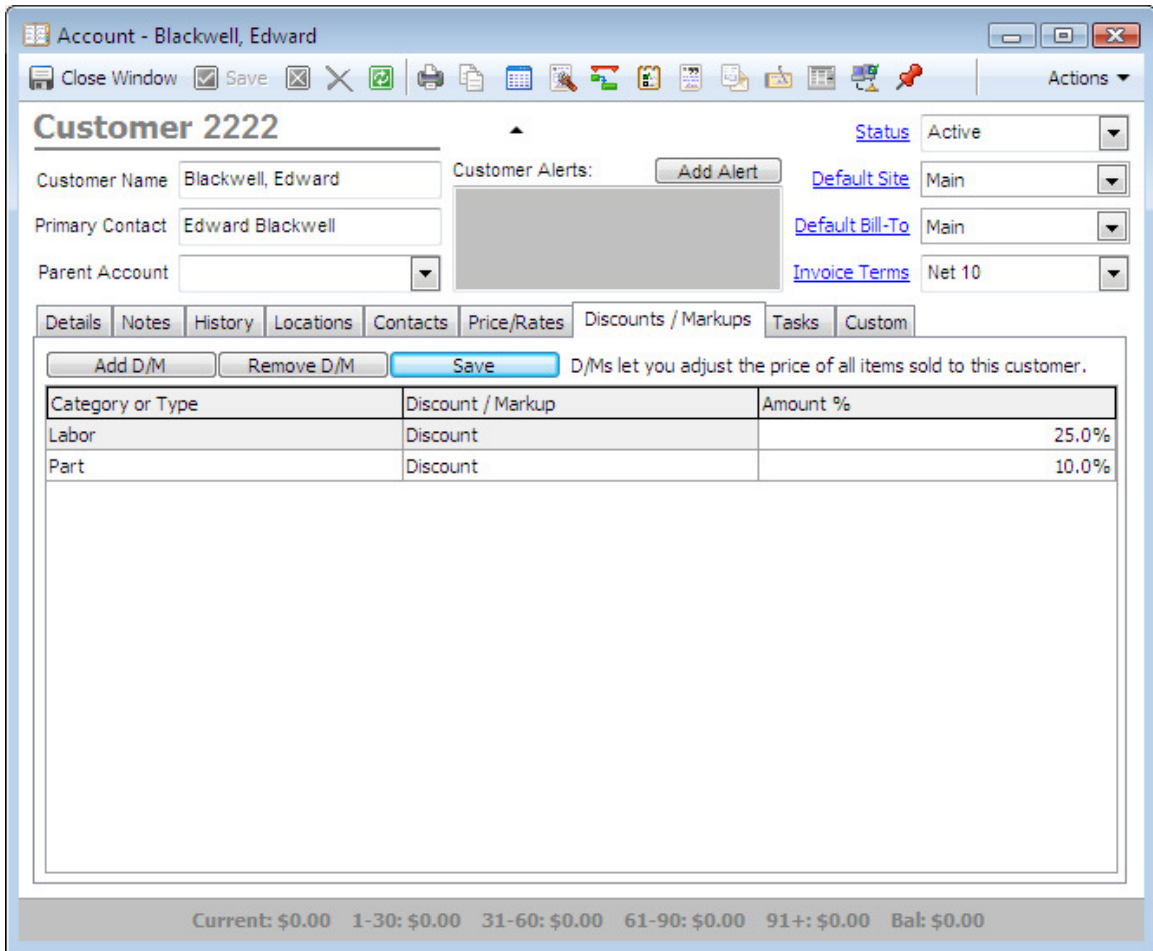
Discounts/Markups

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).
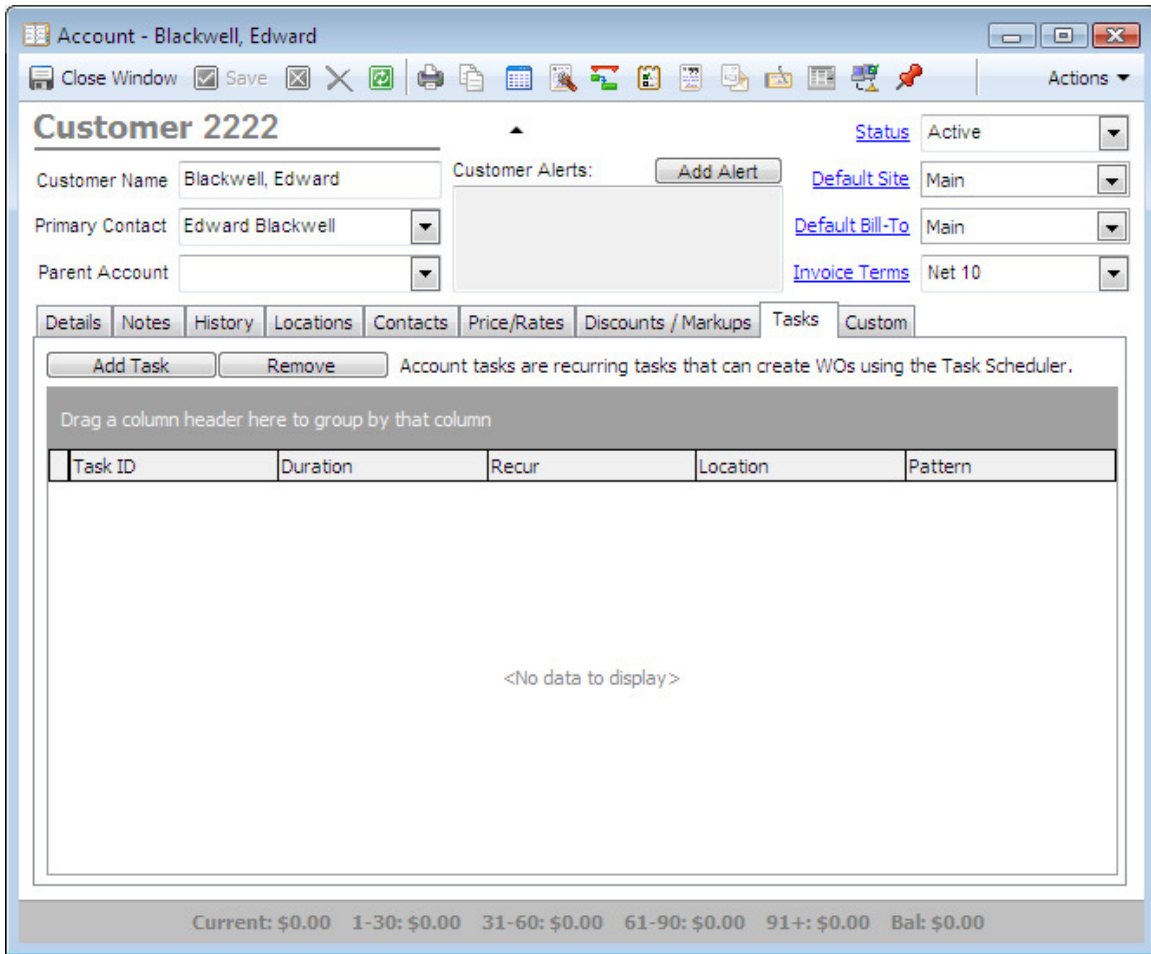
Custom:

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.)

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.

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.

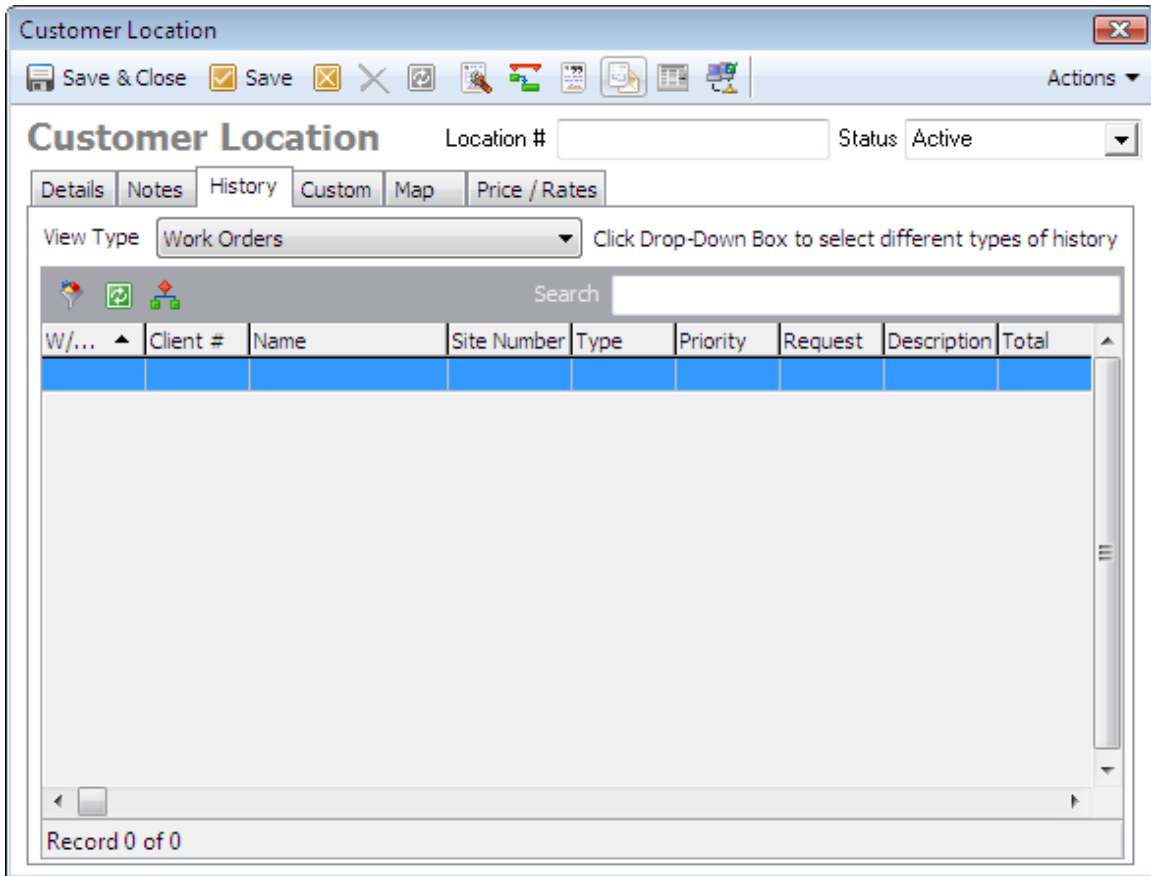***Getting Oriented with Customer Locations:***

Notes:

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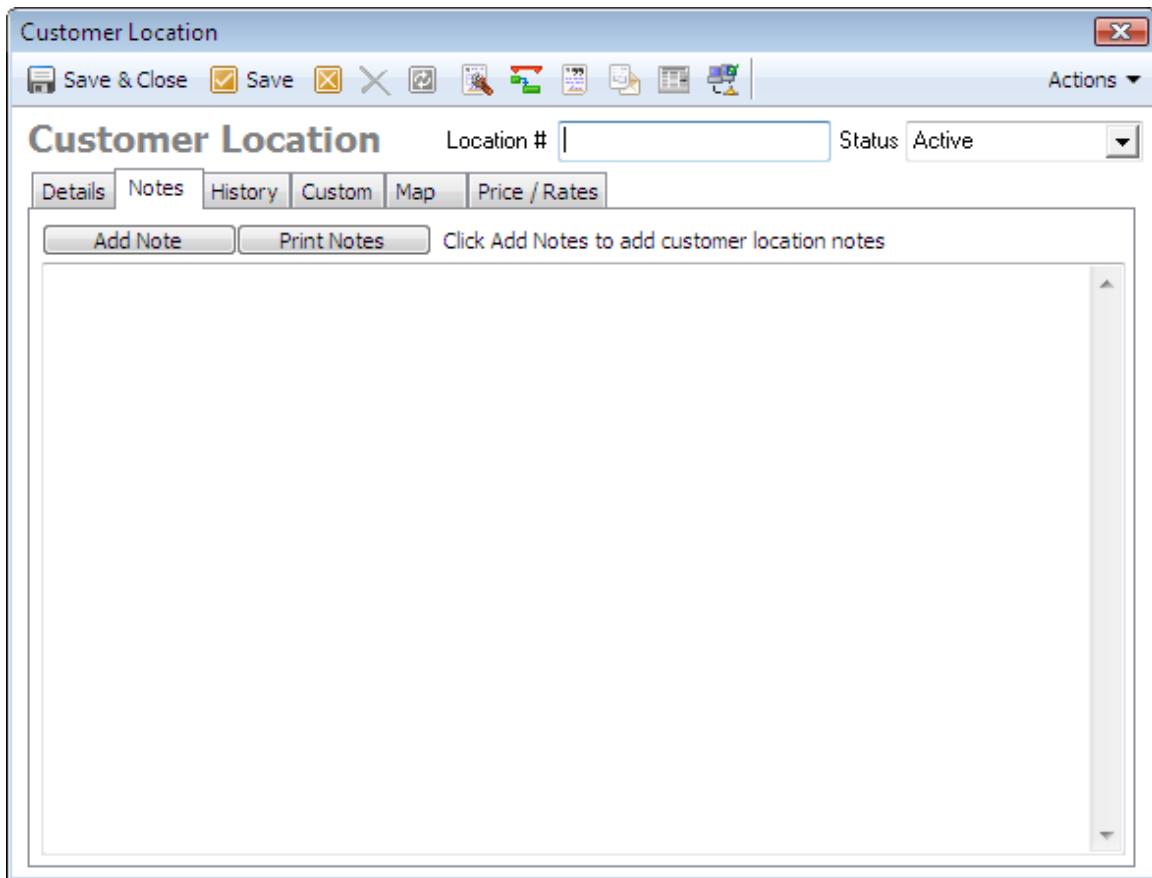
History:

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.

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.