ServiceLedger 2009

Getting Started Guides

Getting Started with the Account Manager

This guide will document how to use the ServiceLedger Account Manager to track customer information including service history, equipment and service contract history and recurring tasks and work orders.

Introduction:

The Account Manager allows you to track and manage your customers and prospects in ServiceLedger. From the Account Manager, you can track customer information, notes, locations, contacts, history and recurring tasks. ServiceLedger requires accounts 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.

What's New in ServiceLedger Version 2009

The following new functionality has been added in ServiceLedger Version 2009:

1. Ability to specify an account as a Third-Party Payer for third-party billing.
2. **Customer Alerts** allowing you to have a special place to enter any information you want to alert users about for any customer.
3. Added a **Country** field to track the country the customer is in.

Benefits of the ServiceLedger Account Manager

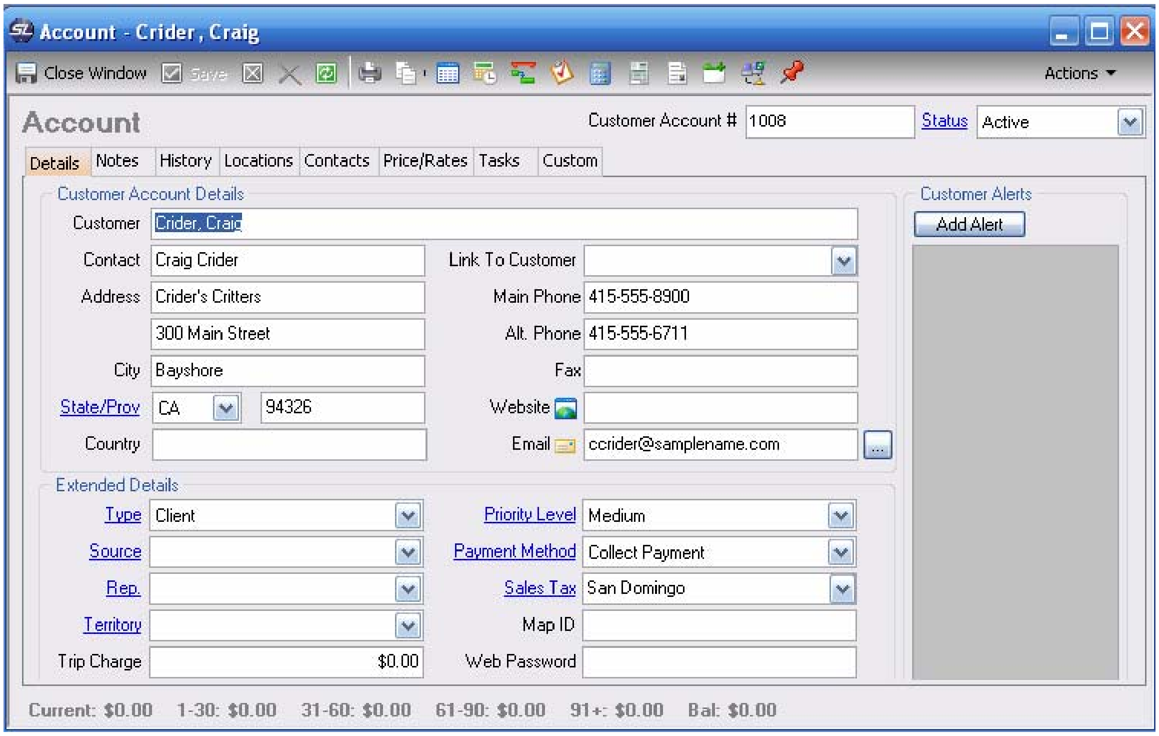
The ServiceLedger Account Manager allows you to track all of your customers and prospects including all relevant data about each customer like address and phone information, notes and history. All information stored in ServiceLedger on any customer is available from the customer account record.

Creating Accounts:

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

To create an account record, click on **Accounts | Account List** from the **Navigator** to open your existing **Account List** to view existing accounts you have created in ServiceLedger.

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



1. The **Account Number** is a unique number to identify the customer. You can use the default account number or change as necessary.
2. **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.
3. The **Customer** is the name of the customer.
4. **Contact** is the main contact of the customer. When you add a contact it will create a contact record for the contact.
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. **Postal** is where you enter the postal code for the customer.
9. **Country** is where you will enter the country the customer is located in.
10. **Link to Customer** is the master account for the customer, if any. Leave blank if no master account is needed.
11. **Main Phone** is where you enter the main phone for the customer.
12. **Alt Phone** is where you can enter an alternate phone for the customer.
13. **Fax** is where you enter the fax for the customer.
14. **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.
15. **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.

16. **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. Note: In Version 2009, you now have the ability to specify a Third Party Payer as a customer type allowing the customer to be able to be responsible for payment of any other customer invoice where you specify that the third-party payer is financially responsible.
17. **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.
18. **Rep** is where you can select the user that is responsible for the account, or sales representative.
19. **Territory** is where you can define the territory for the customer and is used in scheduling.
20. **Trip Charge** is the default charge that will be added to all jobs created for the customer for travel charges.
21. **Priority Level** is where you can define the priority level for the customer and is useful if you want to prioritize your customers.
22. **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.
23. **Sales Tax** is the selected tax rate that will be calculated on jobs or invoices for sales tax purposes.
24. **Map ID** is where you can track cross-streets or other mapping information to allow your technicians to easily find a location.
25. **Web Password** is for the ServiceLedger Customer Web Portal and is where the customer password is stored.
26. Click the **Save** button to save the account record.

Getting Oriented with the Account Record:

The account 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 account records, there is so much more you can track in ServiceLedger.

<u>Action Buttons:</u>

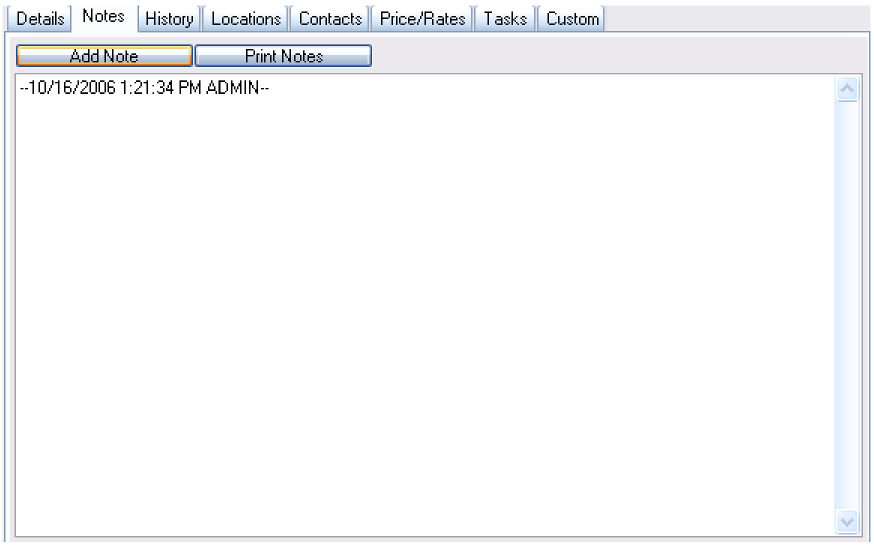
Click on the Action button in the far upper right corner of the account record to view all of the actions available for the account. Actions are a quick way to add work orders, quotes, equipment, service agreements, invoices, etc. for a customer.

<u>Accounts Receivable Aging:</u>

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

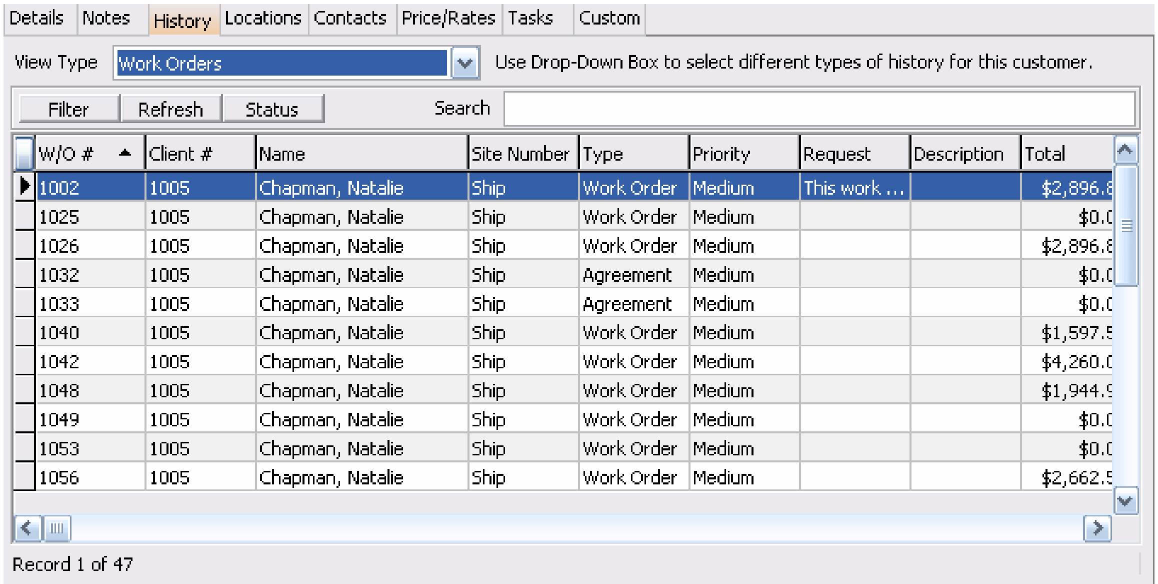
<u>Notes:</u>

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



<u>History:</u>

The **History** tab is where you can view the history of the account. 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.

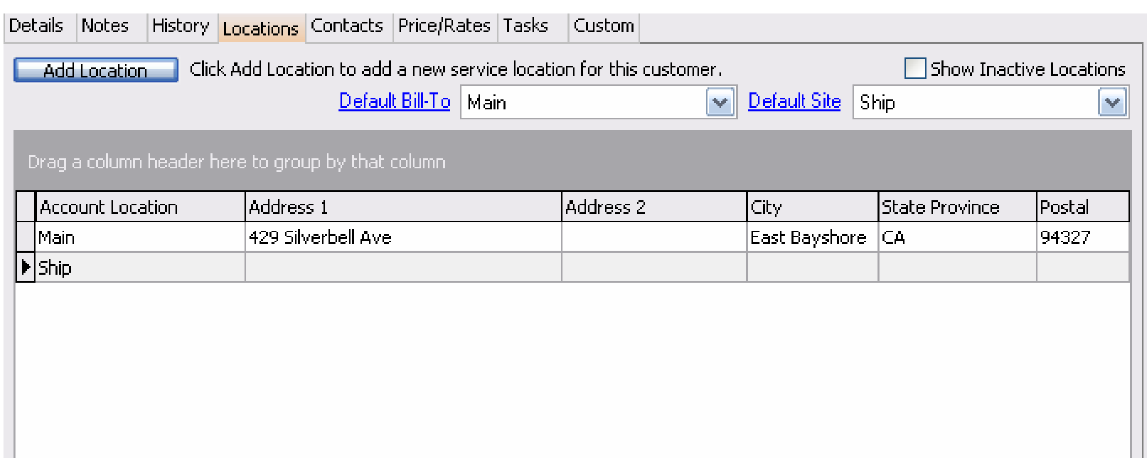


<u>Locations:</u>

The **Locations** tab is where you can view all service locations for any account. ServiceLedger allows you to store unlimited locations for each account record. You can add additional locations by clicking on the **Add Location** button (see Creating Account 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.

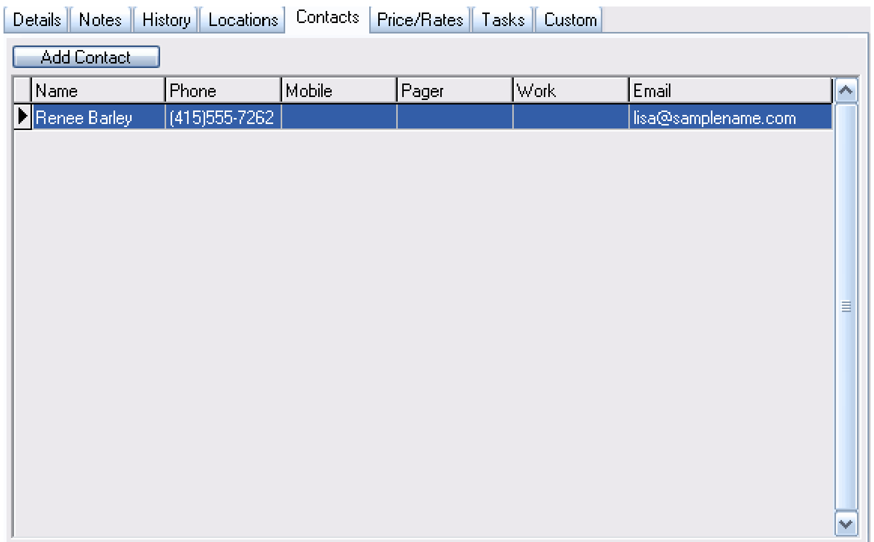
You can setup a **Default Bill-To** and **Default Service Site** for any account at the bottom of the Locations tab. This is useful if you want ServiceLedger to know where to send invoices, etc. Use the drop-down box to define the **Default Bill-To** and **Default Site**.

Important Note: The Main Location cannot be edited from the location record and can only be edited from the account record. The Main Location is always the main account record.



Contacts:

The **Contacts** tab is where you can store the contacts for the account. For commercial accounts, 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 Account 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.

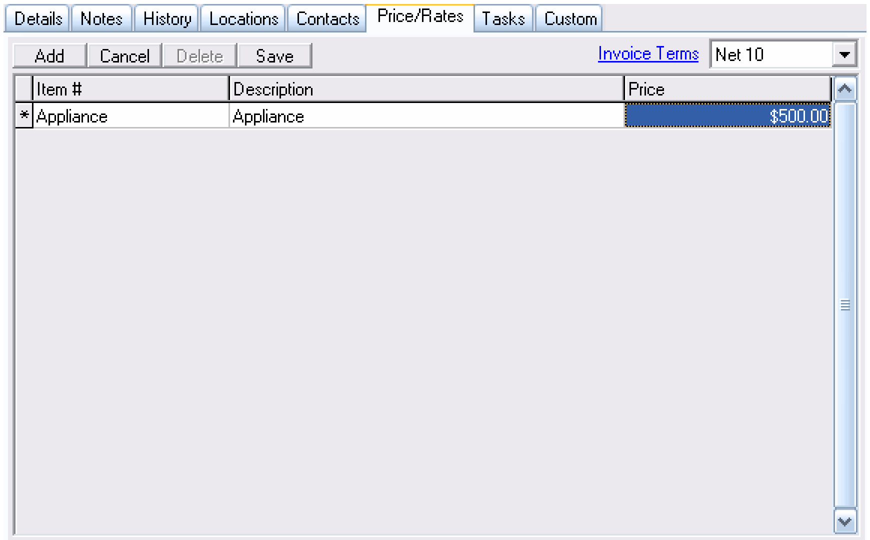


Price/Rates:

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

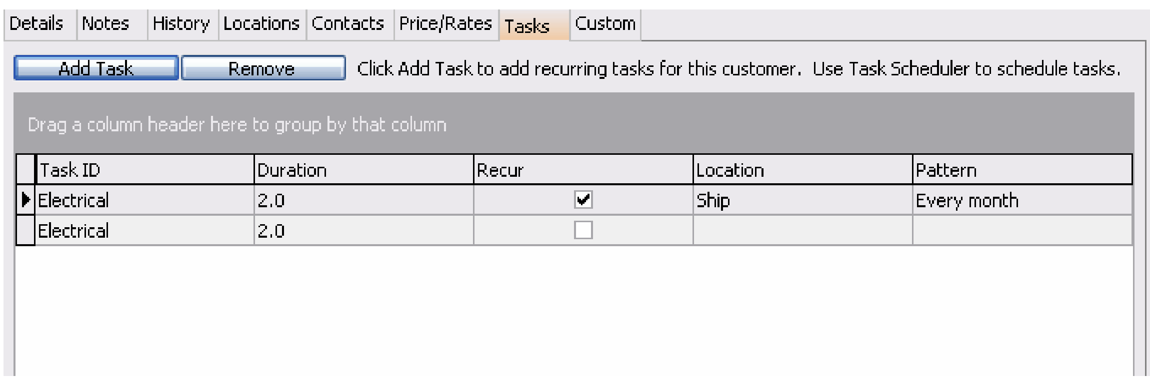
Click the **Add** button to add a new Price/Rate and update the special price on the **Price** field.

Alternatively, you can use the **Price Level** drop-down to specify a price level for the customer. When you specify a price level for a customer, all the pricing for that price level as defined by you will apply to the customer.



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 account (See Getting Started with Tasks for more information on recurring tasks).



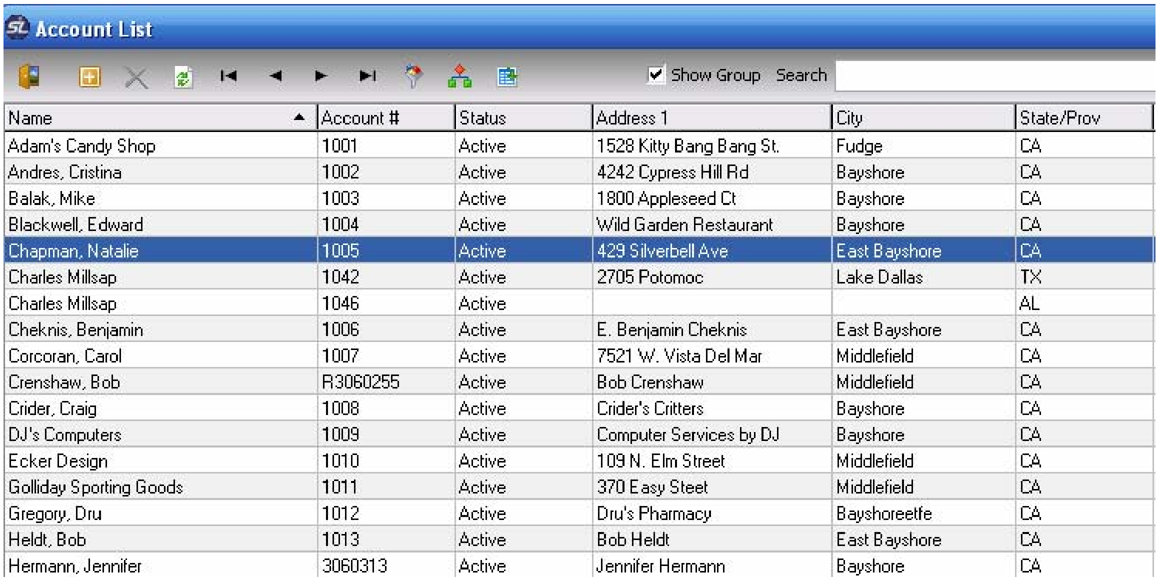
Custom:

The **Custom** tab is where you can store any custom information you choose on accounts.

Searching For Account Records via the Account List:

The **Account List** allows for flexible searching of account records. You can search for any account 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**).

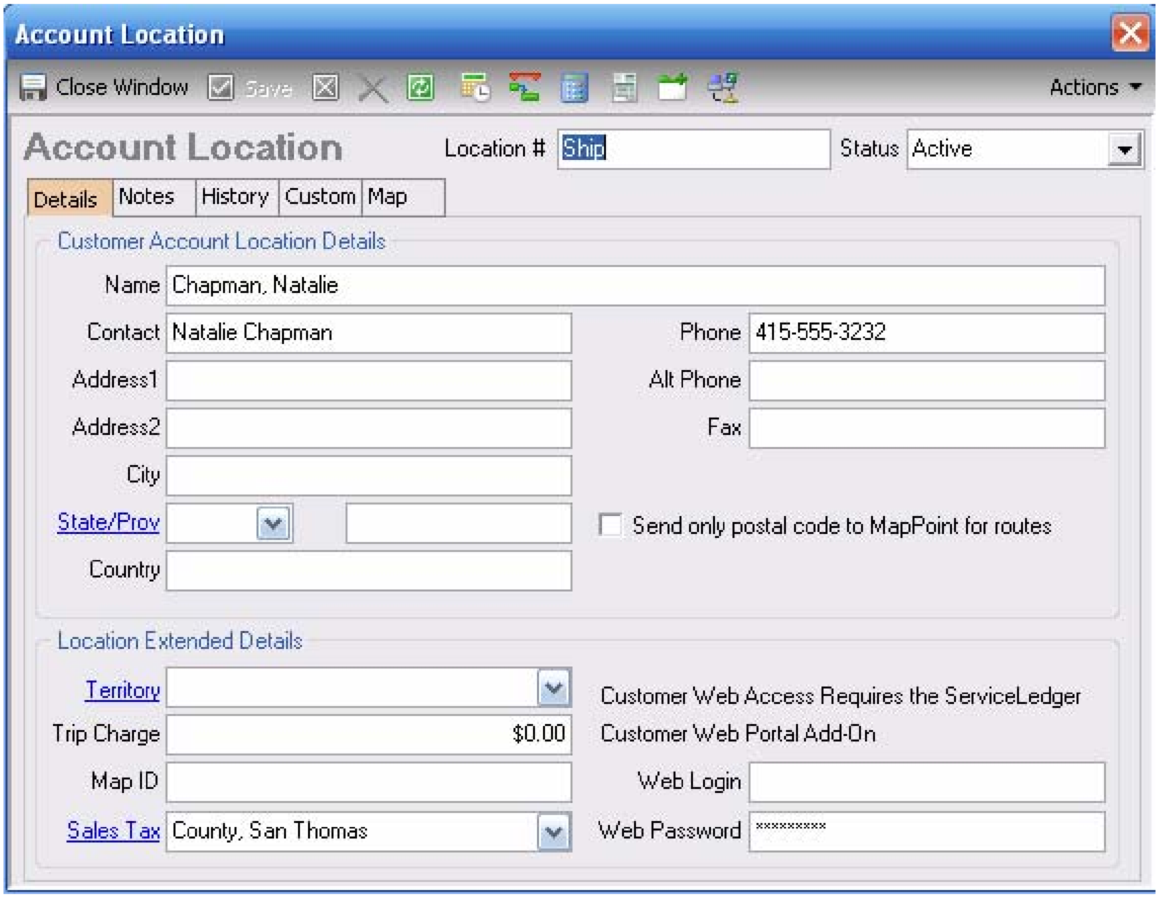
From the **Account List**, you can enter the information you want to search for and ServiceLedger will go to that specific row in the database. To search by another column, simply click the column header so that the ▲ is on the column header (on the below example the ▲ is on the Name telling ServiceLedger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



Name	Account #	Status	Address 1	City	State/Prov
Adam's Candy Shop	1001	Active	1528 Kitty Bang Bang St.	Fudge	CA
Andres, Cristina	1002	Active	4242 Cypress Hill Rd	Bayshore	CA
Balak, Mike	1003	Active	1800 Appleseed Ct	Bayshore	CA
Blackwell, Edward	1004	Active	Wild Garden Restaurant	Bayshore	CA
Chapman, Natalie	1005	Active	429 Silverbell Ave	East Bayshore	CA
Charles Millsap	1042	Active	2705 Potomoc	Lake Dallas	TX
Charles Millsap	1046	Active			AL
Cheknis, Benjamin	1006	Active	E. Benjamin Cheknis	East Bayshore	CA
Corcoran, Carol	1007	Active	7521 W. Vista Del Mar	Middlefield	CA
Crenshaw, Bob	R3060255	Active	Bob Crenshaw	Middlefield	CA
Crider, Craig	1008	Active	Crider's Critters	Bayshore	CA
DJ's Computers	1009	Active	Computer Services by DJ	Bayshore	CA
Ecker Design	1010	Active	109 N. Elm Street	Middlefield	CA
Golliday Sporting Goods	1011	Active	370 Easy Steet	Middlefield	CA
Gregory, Dru	1012	Active	Dru's Pharmacy	Bayshoreetfe	CA
Heldt, Bob	1013	Active	Bob Heldt	East Bayshore	CA
Hermann, Jennifer	3060313	Active	Jennifer Hermann	Bayshore	CA

Creating Account Locations:

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



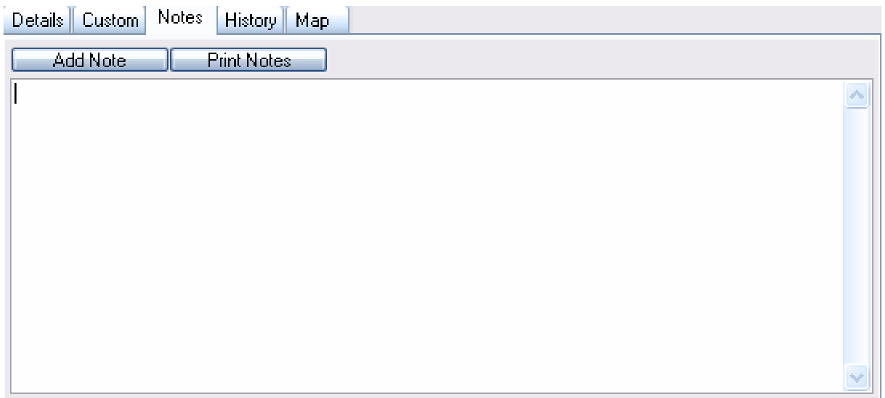
1. Enter a unique **Location #** for the account location. The **Location #** must be unique for each account. *Note: An account location record is always created for the main account record, however you will not be able to edit the account location record. If you need to edit the main location, you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

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

Getting Oriented with Account Locations:

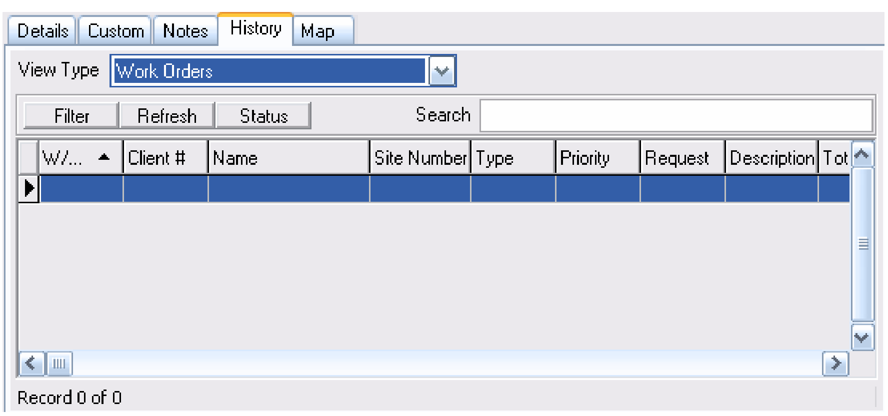
<u>Notes:</u>

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



<u>History:</u>

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



<u>Map:</u>

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

<u>Custom:</u>

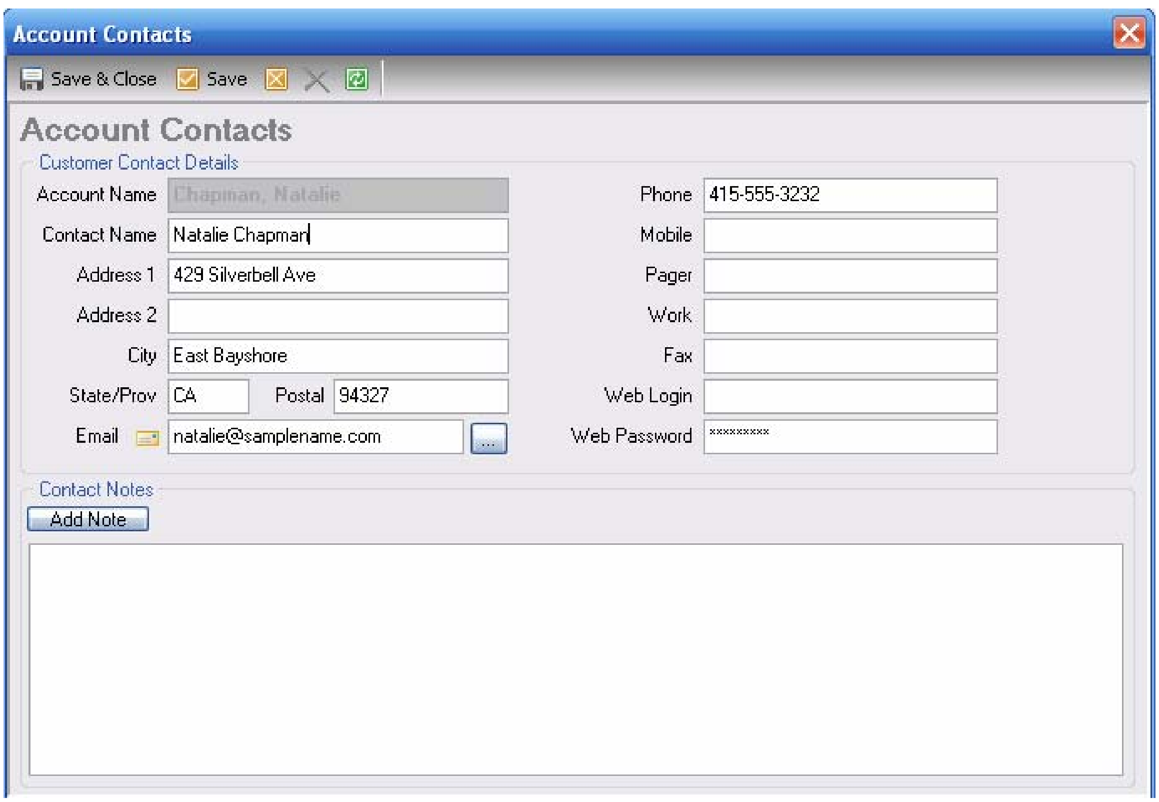
The **Custom** tab is where you can store custom information on the account location.

Searching for Account Locations via the Account Location List:

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

Creating Account Contacts:

Account Contacts are the contacts you deal with at any customer or prospect account. You can store separate contact records for each contact so that you can separate notes for each. From any account 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 Account Contacts via the Account Contact List:

Like the **Account List**, you can search for account contacts via the **Account Contact List**. This is useful if you want to pull up the account contact record instead of the account record. To search by account contacts, click on **Accounts | Contact List** from the **Navigator** to view your existing contacts and search.

Customer Alerts:

ServiceLedger 2009 allows you to track any customer alerts on a customer using the **Customer Alert** memo box. This special memo box is designed for you to record any information you want to alert you users on regarding a specific customer. Currently, the Customer Alert is only available on the account record, however will soon be rolled out to pop-up on all transaction windows including quotes, work orders, invoices, etc. To add a customer alert, click on the **Add Alert** button to add the customer alert.

Third-Party Payer:

ServiceLedger 2009 allows you to specify a customer account as a responsible third-party payer of work orders for other customers. In order to use this feature, you must specify your third-party payers. To accomplish this, select the **Type** field on the customer account record and select the **Third Party Payer** option to let ServiceLedger know the customer is a third-party payer.

