Totally Internet Based Software

Customer Entry

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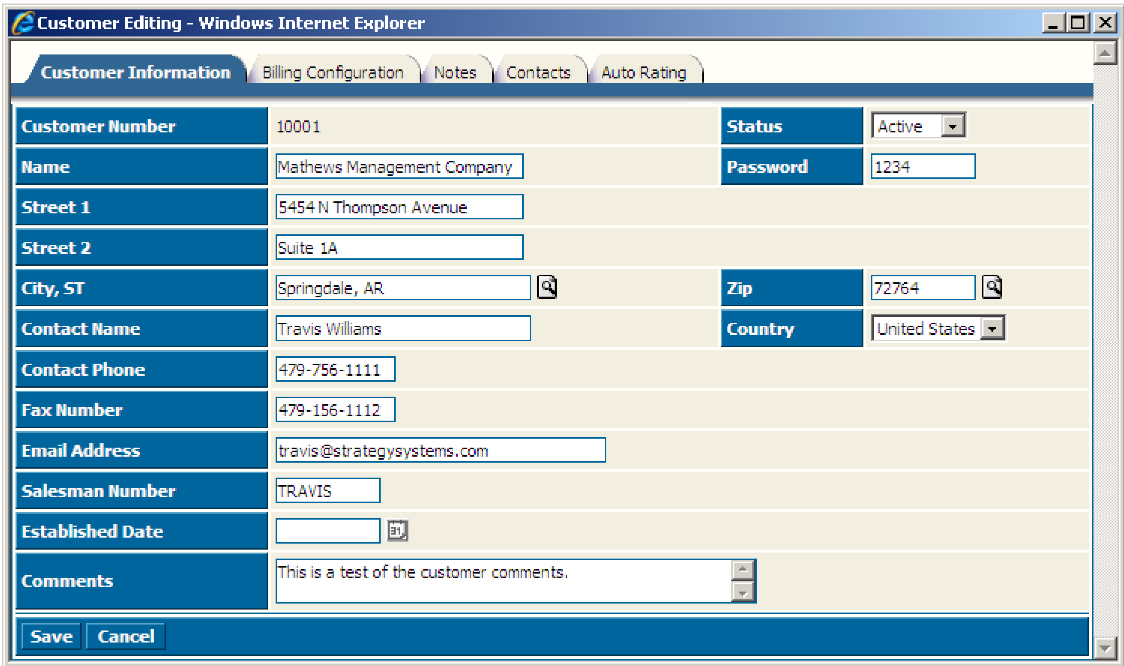
Adding Customers

Go to Administration> File Maintenance> Customers to add a new customer. A list of all of the system's current customers will be displayed. Click the Create button at the top of the list to enter a new customer.

Customer Information Tab

The Customer Information tab displays the general information about the customer.

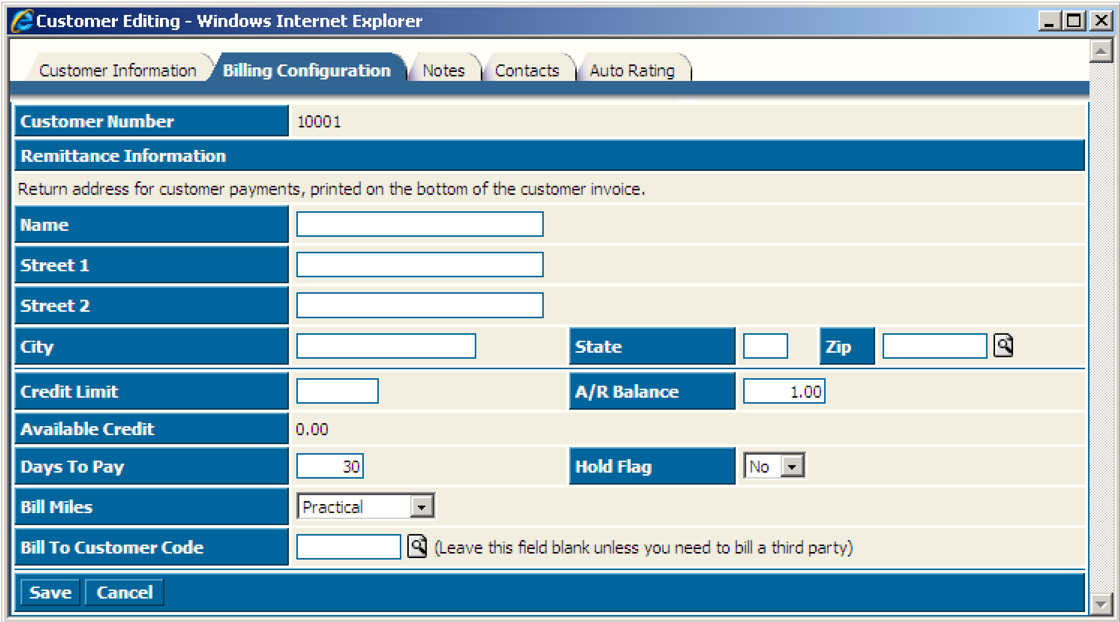


Enter the information according to the following field definitions:

Customer Number: The number automatically assigned to the customer by the Strategy Live system.
Status: Choose Active or Inactive status for the customer.
Name: The name of the customer.
Password: The password the customer will use to log into the customer interface.
Street 1: The first line of the customer's address.
Street 2: The second line of the customer's address.
City, ST: The city and state where the customer is located.
Zip: The zip code where the customer is located.
Contact Name: The name of the main contact at the customer.
Country: The country where the customer is located.
Contact Phone: The phone number used to reach the main contact.
Fax Number: The fax number used to reach the main contact.
Email Address: The email address used to reach the main contact.
Salesman Number: The Strategy Live user responsible for this customer.
Established Date: The date that the customer began doing business with you.
Comments: A free form field to enter comments about the customer.

Billing Configuration Tab

The Billing Configuration tab is where the billing information for the customer is stored.



Enter the information according to the following field definitions.

Remittance Information: Enter the address where the customer will send invoice payments. This is only necessary if the address is different than the main company mailing address.

Credit Limit: The amount of credit you extend to your customer.

A/R Balance: The current balance imported from accounting software.

Available Credit: The amount of credit available for the customer.

Days To Pay: The number of days the customer has to pay the invoice.

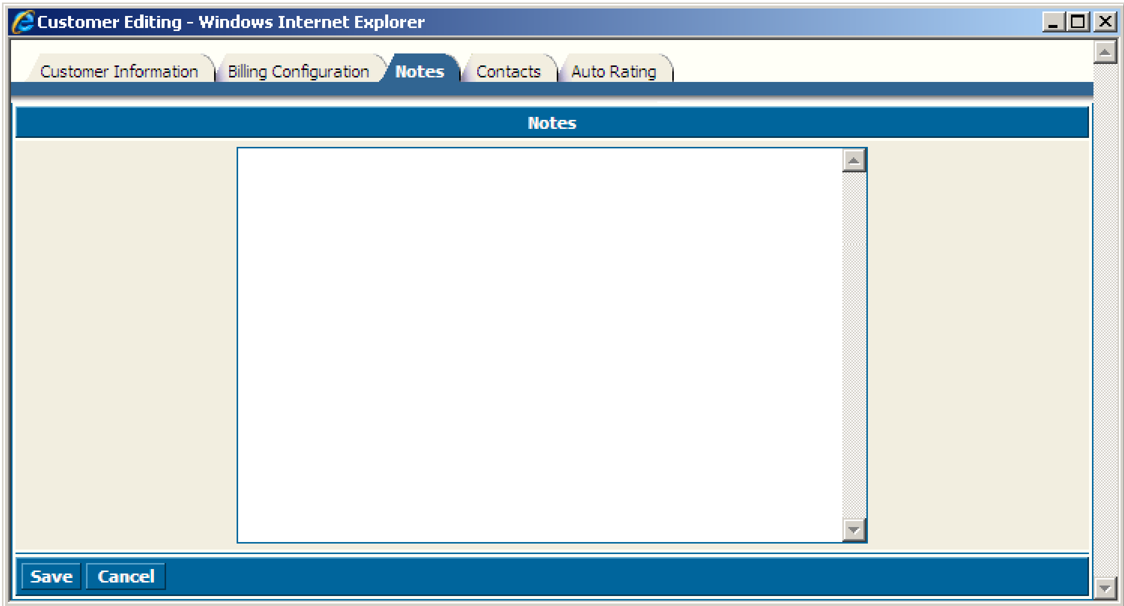
Hold Flag: Choose Yes to put a flag on this customer so that they cannot be used or choose No to allow this customer to do business with you.

Bill Miles: Choose the mileage type to use when billing the customer.

Bill To Customer Code: The customer code of a third party bill to customer.

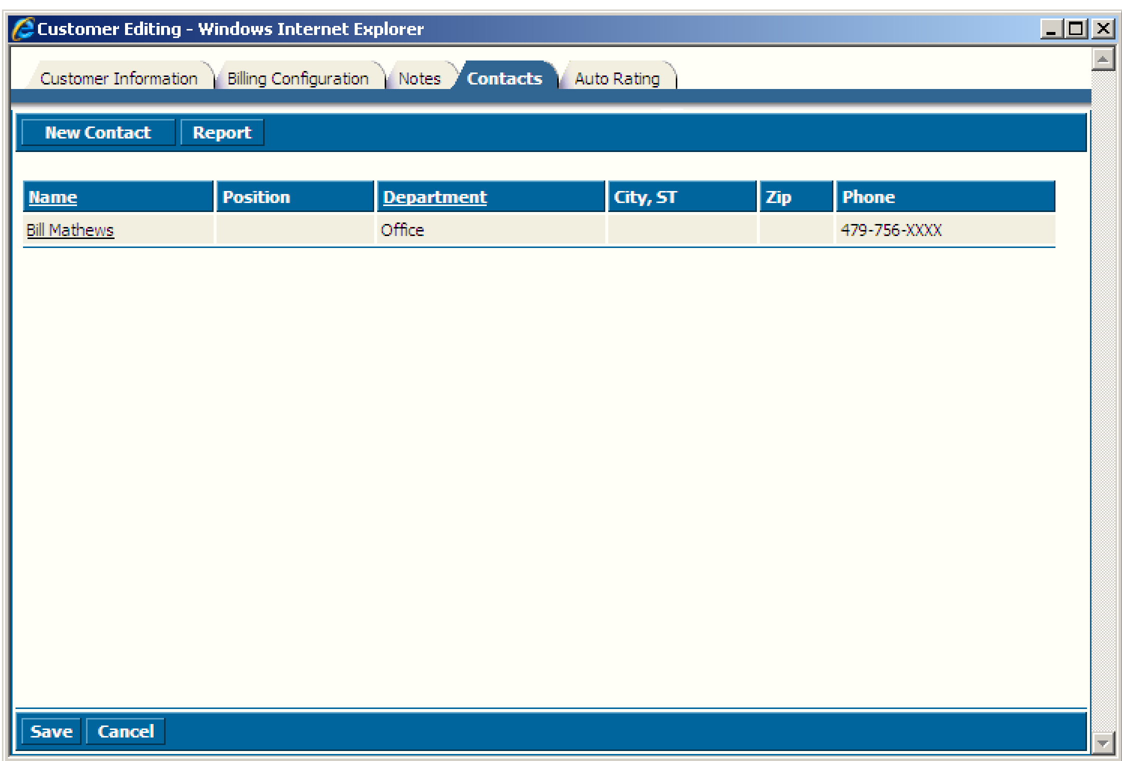
Notes Tab

This is a place for notes about the customer.



Contacts Tab

The Contacts tab is used to store multiple contacts for the customer location. The list displays the contact's name, position, department, city, state, zip, and phone number.

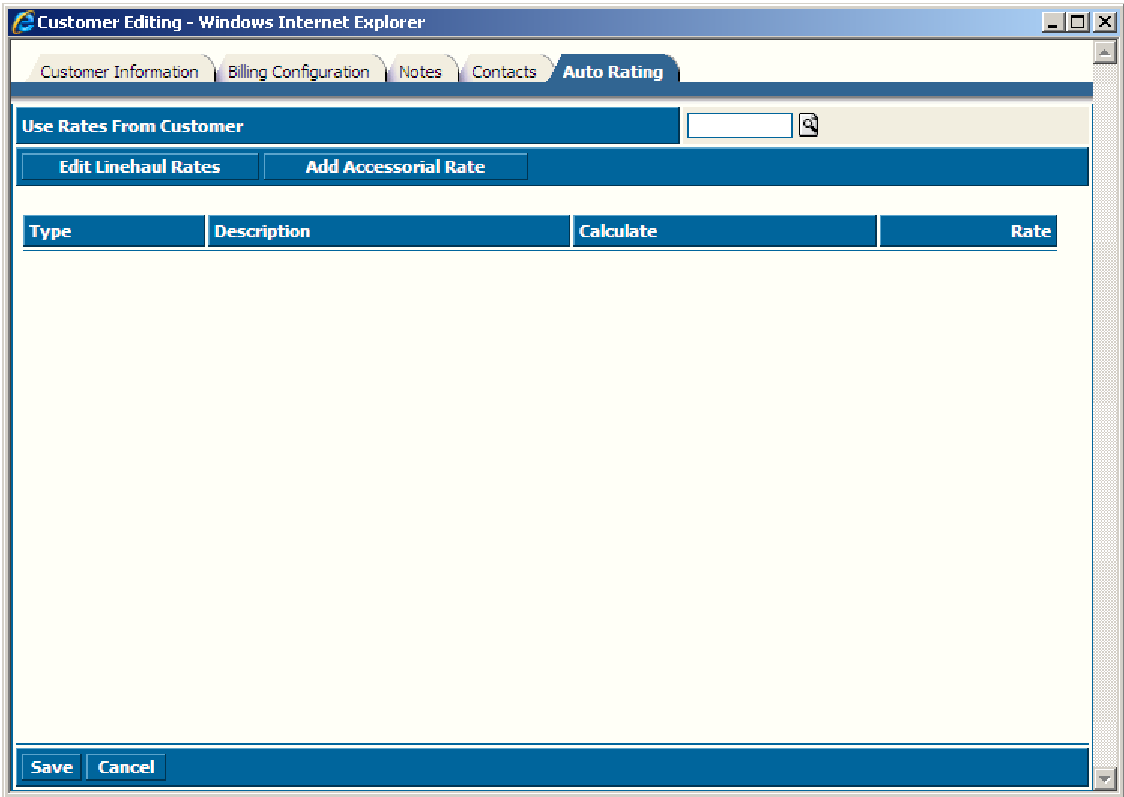


Adding A New Contact

To add a new contact, click the New Contact button located at the top left. It will open a contact information window. Enter all of the known information about the contact and click the Create button.

Auto Rating Tab

The Auto Rating tab is used to store rates that can be added to a load with the click of a button.



Enter the information according to the following field definitions:

Use Rates From Customer: Enter a different customer number if you wish to use the rates from a different file.