Customers

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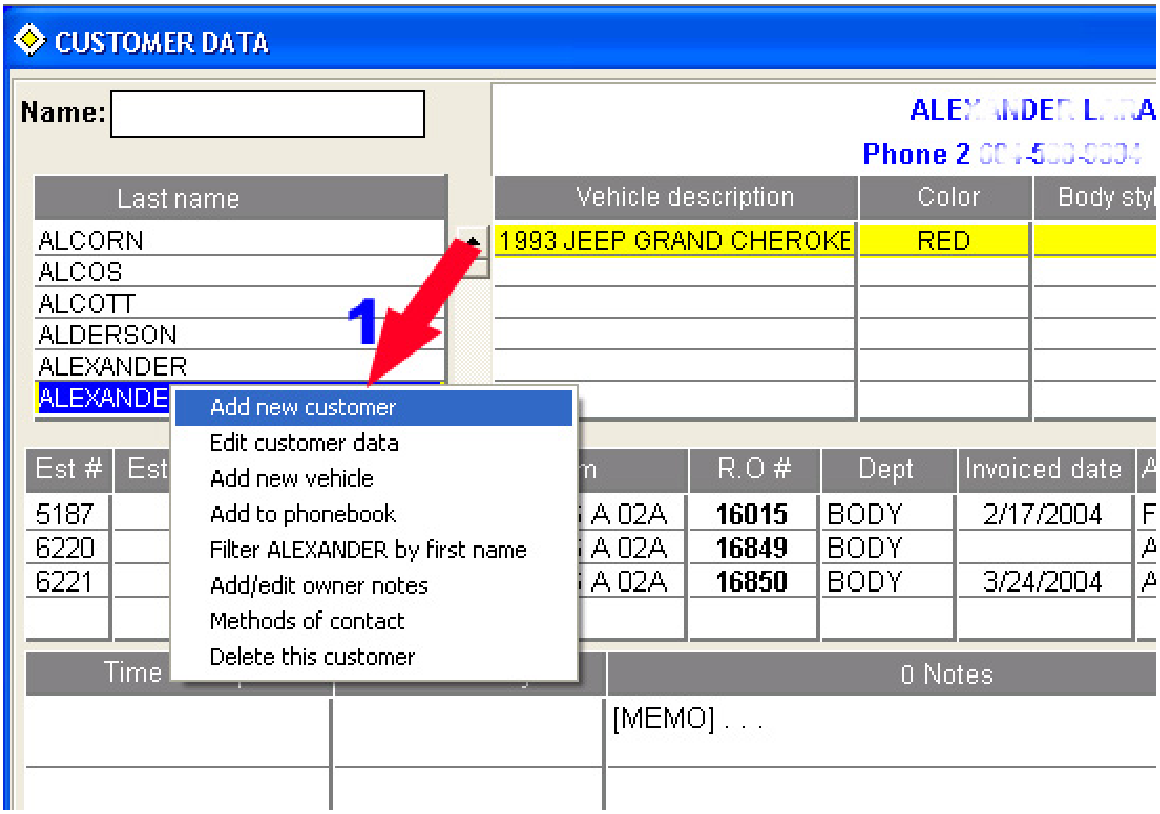
Create a new customer record

Procedures outlined here apply only to customer data entered into the system manually. See "Importing data from PenPro", "Importing Shoplink estimate"and "Importing CIECA standard estimates" for additional procedures.



1.1 Main customer data screen shot

1. On the main customer data screen, (*see figure 1.1*) left click any customer's last name
2. Right click to activate the pop-up menu associated with customer's data
3. Left click "Add new customer" pop-up menu item (indicated by arrow 1)
4. "Add / edit customer information" screen will open (*see figure 1.2*)

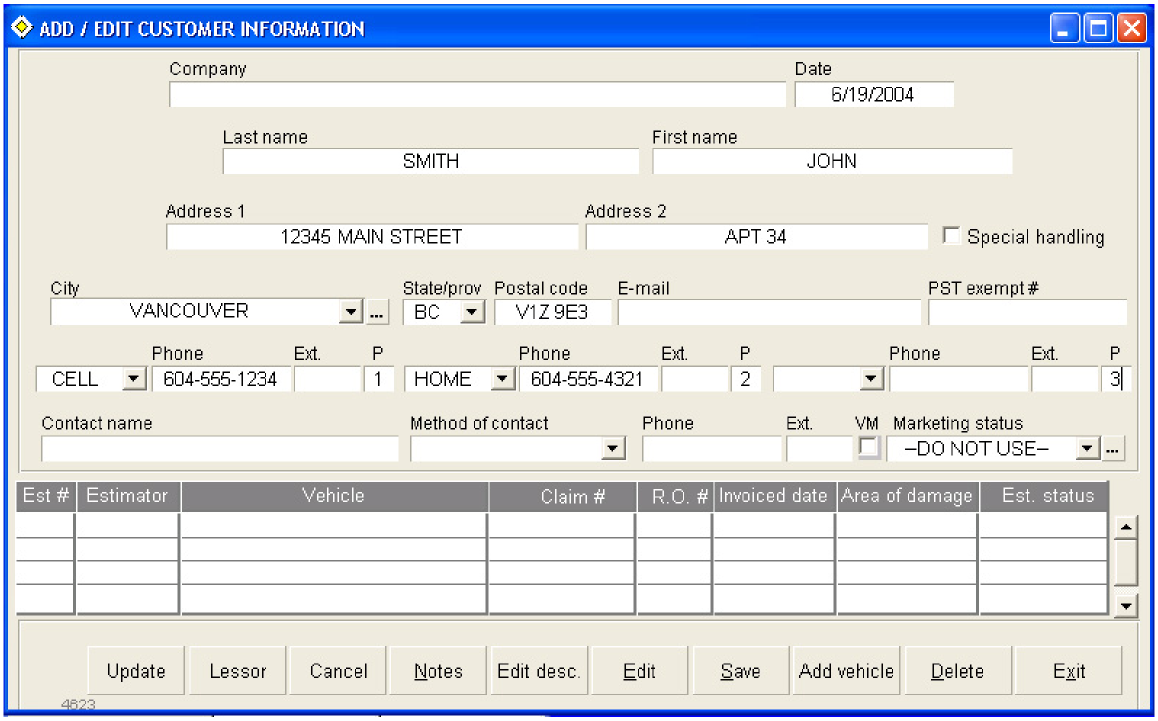


figure 1.2, "Add/edit customer information" screen

5. The following information must be entered:
    - Customer's last name or a company's name (company name should be entered in the "Last name" field to maintain data consistency)
    - Customer's first name.
    - Street address.
    - City.
    - Province or state of residence.
    - Postal code.

    Additionally, we recommend that the following is also entered:
    - Customer's email address.
    - Primary and secondary phone numbers (phone number description i.e. "Cell", "Home", "Work" etc can be selected), phone extension can also specified. Click "Edit desc" to add, edit or delete existing phone number descriptions.
    - In the field marked by the letter "P" (located to the right "Ext" field), select which phone number should be used as the primary way of contacting the customer by putting a number 1,2 or 3 in the appropriate field. Number "1" indicates the phone number that should be used first to contact the customer, number "2" indicates second best phone number to be used etc. (*see figure 1.3)*

figure 1.3

- If the vehicle is owned by a company, specify contact's person name, method of contact and phone number.
- Depending on circumstances, the customer may also be flagged as designated for "Special handling".
- At this point you should also define the customer's marketing status. (*see figure 1.4*)

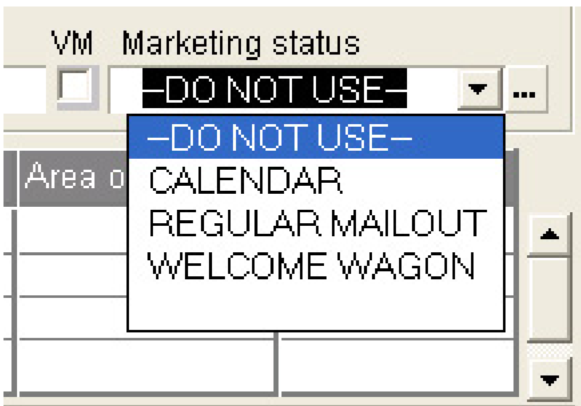


figure 1.4, "Add/edit customer information" screen, define customer's marketing status

- The default status of "DO NOT USE" can be changed by selecting an appropriate status from the drop down menu. This field is used to identify customers that will receive marketing information from your shop in the future and should not be confused with regular, personalized follow-up letters. Please consult your regulatory body for more information about Personal Information Protection Act (Bill 38) that came into effect on January 1, 2004.
- The default values of the drop down menu can be edited by clicking on the button marked "…". *(see figure 1.5)*

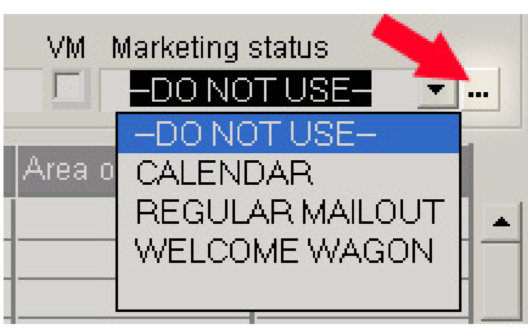


figure 1.5, define default values for marketing status

- The following window will open, *see figure 1.6*

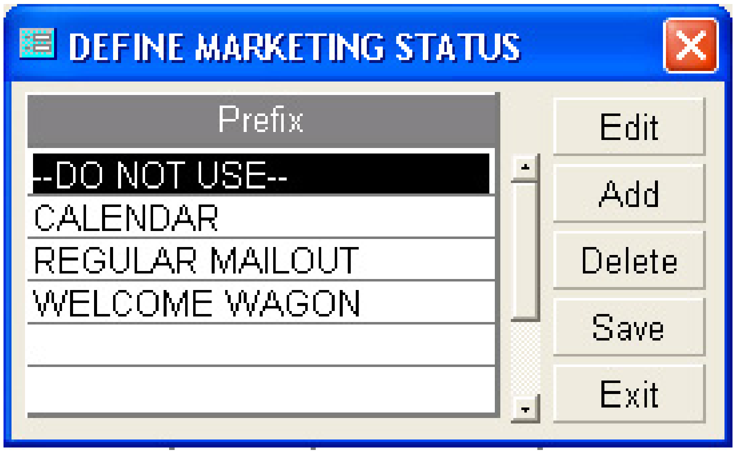


Figure 1.6, Define default values for drop down menu for marketing staus

- Click the "Add" button to create your own menu values, "Edit" to chnaget existing values or "Delete" to permanently remove them as required. Click "Exit" to return to previous window.

6. Verify all information, click the "Save" button. See "Entering vehicle details" for additional information.

Editing customer records

Procedures outlined here apply to all customer records, regardless whether they have been entered manually or have been imported from a third party estimating software.

1. In the “Customer data” window, (*figure 2.1*) locate the customer’s record by typing the first few letters of customer’s last name. (see “Filtering customer’s records by first name” for instructions about filtering your records). Left click on the name of the customer for whom you wish to edit the existing information. Right click to activate the pop-up menu. Left click “Edit customer data” menu item.

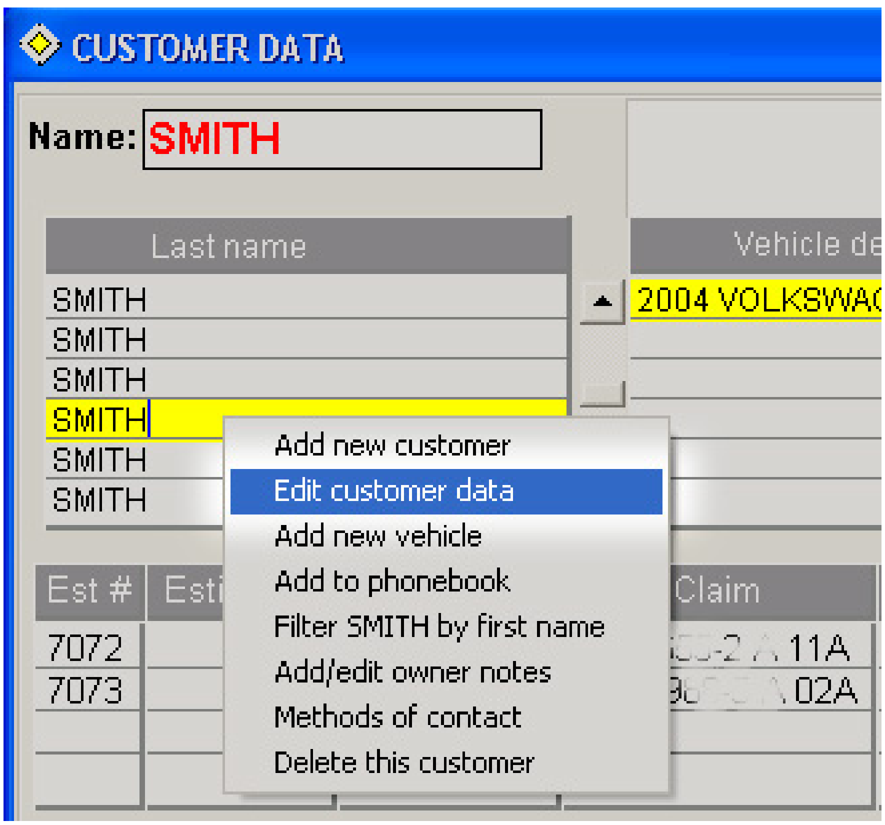


figure 2.1 select customer record for editing

2. The "Add/edit customer information" window will open. Note that a table displaying linked estimates and repair orders is displayed at the bottom of the screen. (*see figure 2.2*)

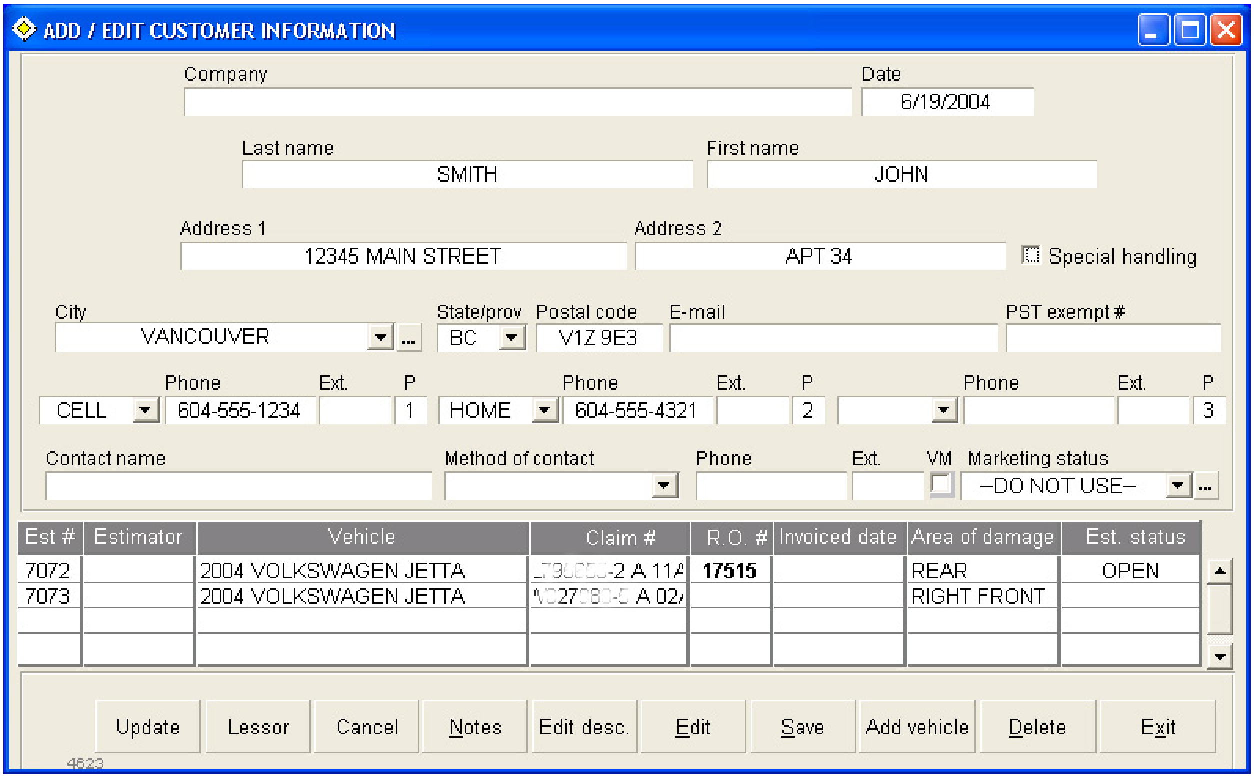


figure 2.2

3. Edit any information, click the "Save" button to save updated data.

Please note: the customer information on the linked estimates and repair orders does not change unless procedure listed below is followed.

4. To update existing customer information in linked estimates and repair orders, right click any record in the table shown in figure 2.3.

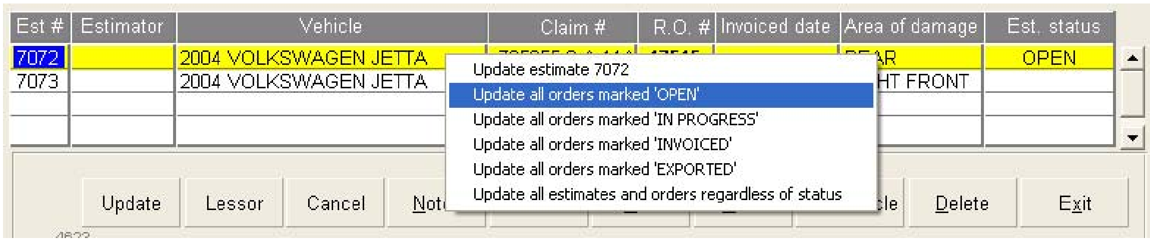


figure 2.3, update existing estimates and repair orders with modified customer's data

5. From the pop-up menu select one of the available options:
   - "Update estimate " will update only the selected estimate number.
   - "Update all orders marked 'OPEN'" will update all open orders (recommended, as this procedure will not update orders that have been closed, invoiced or exported into accounting system).
   - "Update all orders marked 'INVOICED'" will update all invoiced orders.
   - "Update all orders marked 'EXPORTED'" will update all exported orders.
   - "Update all estimates and orders regardless of status" will update all linked records.

Correcting owner information on estimates downloaded from PenPro

Note: this procedure can only be used to correct customer's data that is linked with a single estimate/repair order. Use procedures listed under "Editing customer records" to correct data for customers with multiple estimates/repair orders.

1. In a case where the vehicle is owned by a leasing company, estimates downloaded from PenPro may display information that is placed in wrong fields. You may see customer's last name displayed in the address field and/or other anomalies. This is NOT due to program malfunction but rather to the way ICBC stores its information. To correct the owner information, in the "Customer data" window, (*figure 2.4*) locate the customer's record by typing the first few letters of customer's last name. (see "Filtering customer's records by first name" for instructions about filtering your records). Left click on the name of the customer for whom you wish to edit the existing information. Right click to activate the pop-up menu. Left click "Edit customer data" menu item.

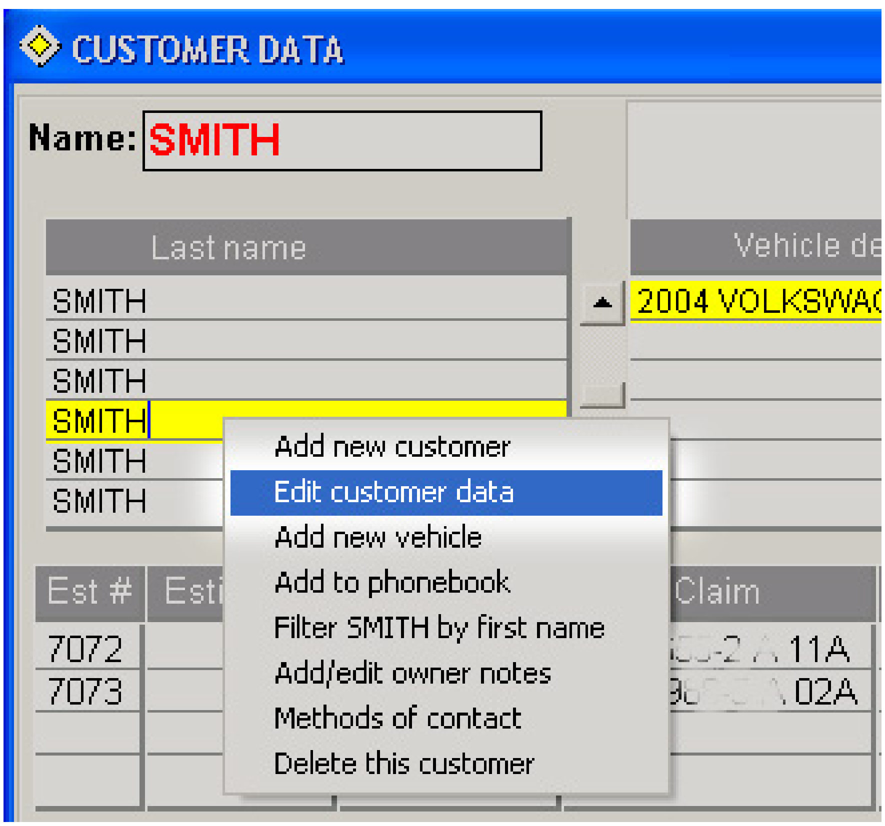


figure 2.4 select customer record for editing

2. The “Add/edit customer information” window will open. Note that a table displaying linked estimates and repair orders is displayed at the bottom of the screen. (*see figure 2.5*)

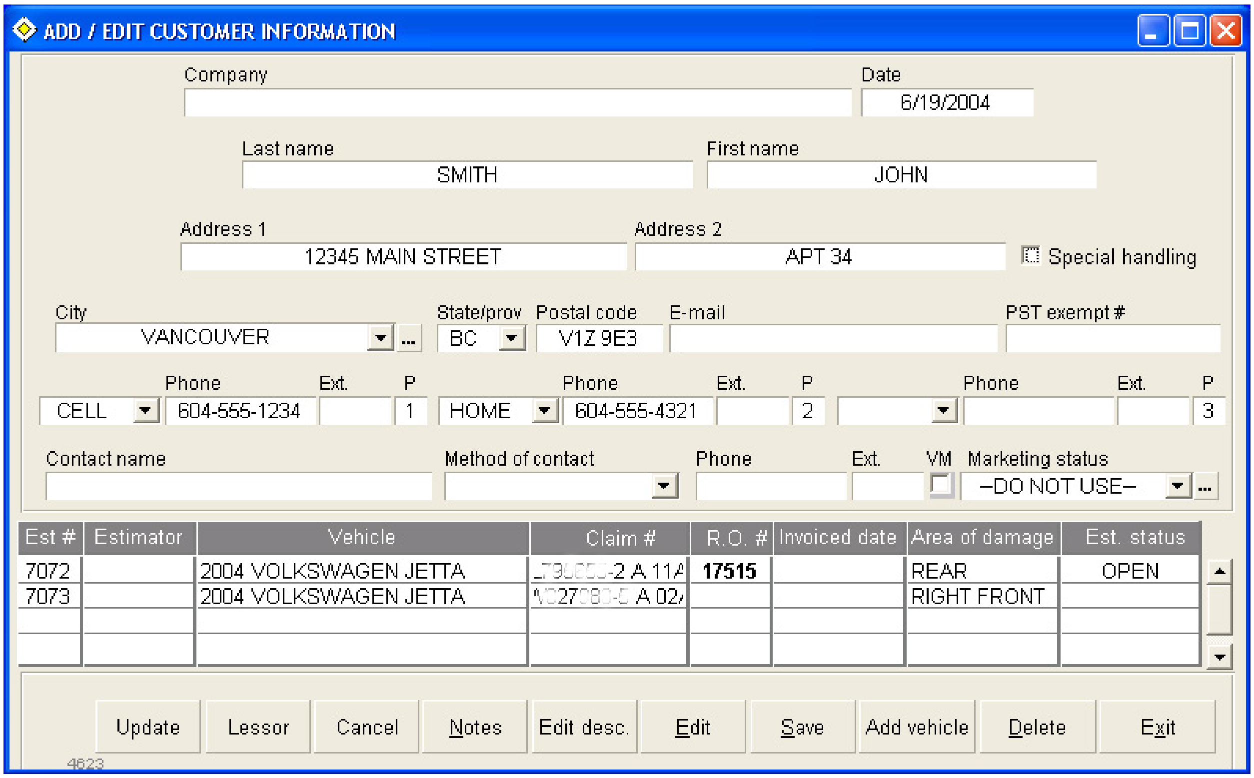


figure 2.5

3. Click the “Lessor” button (*see figure 2.6*)

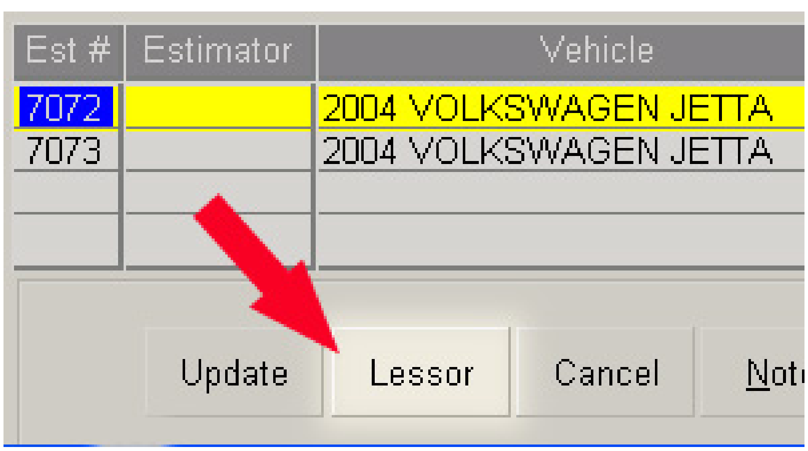


figure 2.6

4. Click on “Yes” in the displayed message box.

5. Verify that information has been corrected properly.
6. Manually correct the “City” field.
7. If information has not been updated properly, <u>**do not save the record,**</u> but click the “Cancel” button instead. This will reverse all changes and allow you to correct the data manually.
8. Click “Save” when done editing the data.

Please note: the customer information on the linked estimates and repair orders does not change unless procedure listed below is followed.

9. To update existing customer information on linked estimates and repair orders, right click any record in the table shown in figure 2.7.

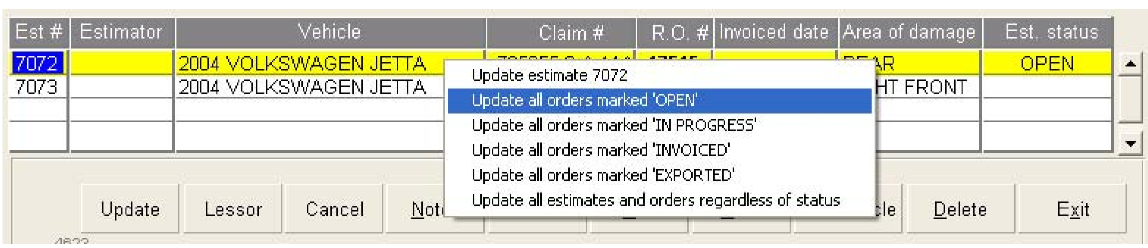


figure 2.7, update existing estimates and repair orders with modified customer’s data

10. From the pop-up menu select one of the available options:
    - “Update estimate “ will update only the selected estimate number.
    - “Update all orders marked ‘OPEN’” will update all open orders (recommended, as this procedure will not update orders that have been closed, invoiced or exported into accounting system).
    - “Update all orders marked ‘INVOICED’” will update all invoiced orders.
    - “Update all orders marked ‘EXPORTED’” will update all exported orders.
    - “Update all estimates and orders regardless of status” will update all linked records.

Updating estimate and repair orders data

Procedures outlined here apply to all customer records, regardless whether they have been entered manually or have been imported from a third party estimating software.

To preserve data integrity, it is necessary to update estimates or repair orders that are linked with the customer after editing and saving customer's record. Estimates or repair orders that are not updated, will display customer's information as it was being displayed and /or printed before the editing took place. To update customer's data in estimates or repair orders:

1. In the "Customer data" window, (*figure 2.81*) locate the customer's record by typing the first few letters of customer's last name. (see "Filtering customer's records by first name" for instructions about filtering your records). Left click on the name of the customer for whom you wish to edit the existing information. Right click to activate the pop-up menu. Left click "Edit customer data" menu item.

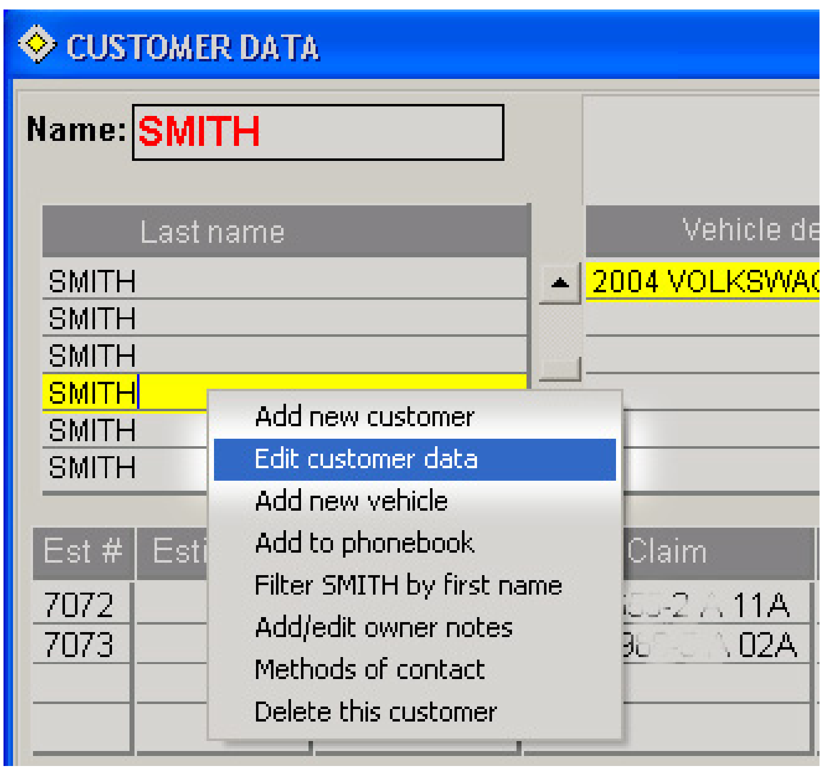


figure 2.8 select customer record for update

2. The "Add/edit customer information" window will open. Note that a table displaying linked estimates and repair orders is displayed at the bottom of the screen. (*see figure 2.9*)

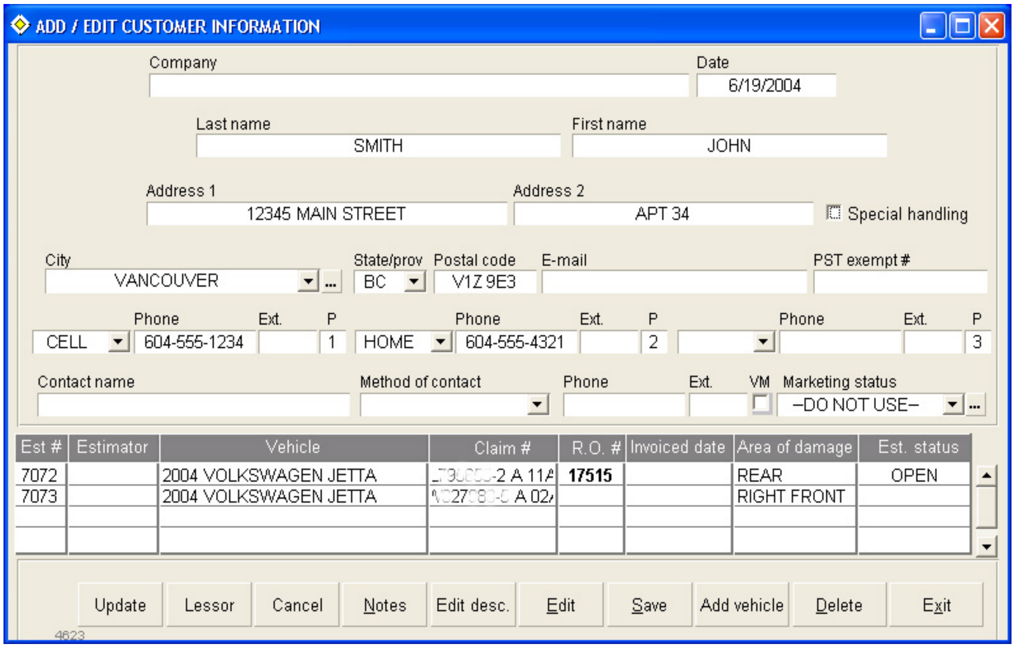


figure 2.9

3. To update existing customer information in linked estimates and repair orders, right click any record in the table shown in figure 2.10.

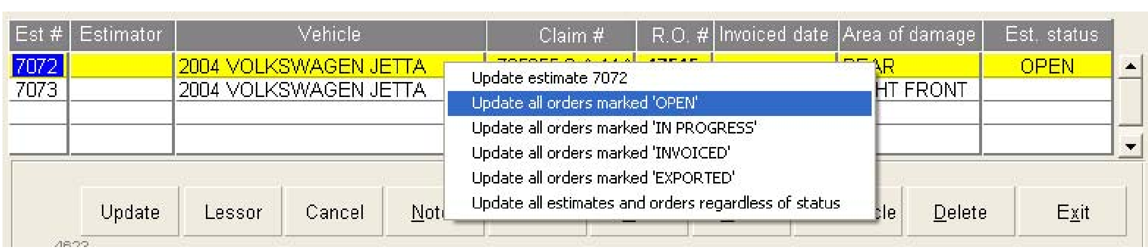


figure 2.10, update existing estimates and repair orders with modified customer's data

4. From the pop-up menu select one of the available options:
   - "Update estimate " will update only the selected estimate number.
   - "Update all orders marked 'OPEN'" will update all open orders (recommended, as this procedure will not update orders that have been closed, invoiced or exported into accounting system).
   - "Update all orders marked 'INVOICED'" will update all invoiced orders.
   - "Update all orders marked 'EXPORTED'" will update all exported orders.
   - "Update all estimates and orders regardless of status" will update all linked records.

Filtering customer's records by first name

It is not uncommon to have many customers sharing the same last name. You may have many customers with the last name of "Smith", which would make locating the desired data difficult and require scrolling through many records. One way of locating the correct record fast and effortlessly is to filter all records with the same last name by the owner's first name.

1. In the "Customer data" window, (*figure 3.1*) locate the customer's record by typing the first few letters of customer's last name. Left click on any last name from the group you wish to filter (in this case "Smith"). Right click to activate the pop-up menu. Left click "Filter SMITH by first name" menu item.

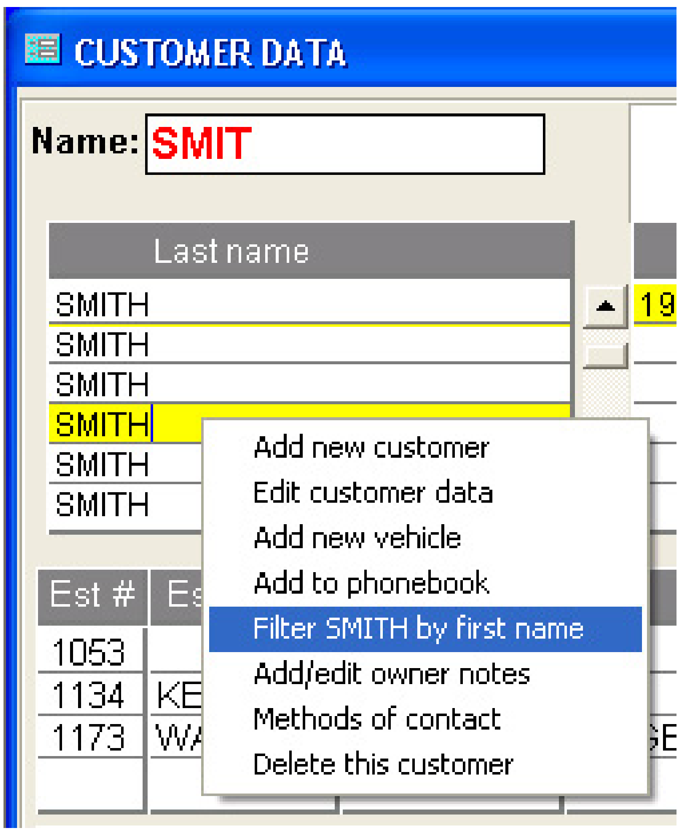


Figure 3.1 Filtering customer records on first name

2. A new window “Customer data sorted by first name (filtered)” will open (*see figure 3.2*)

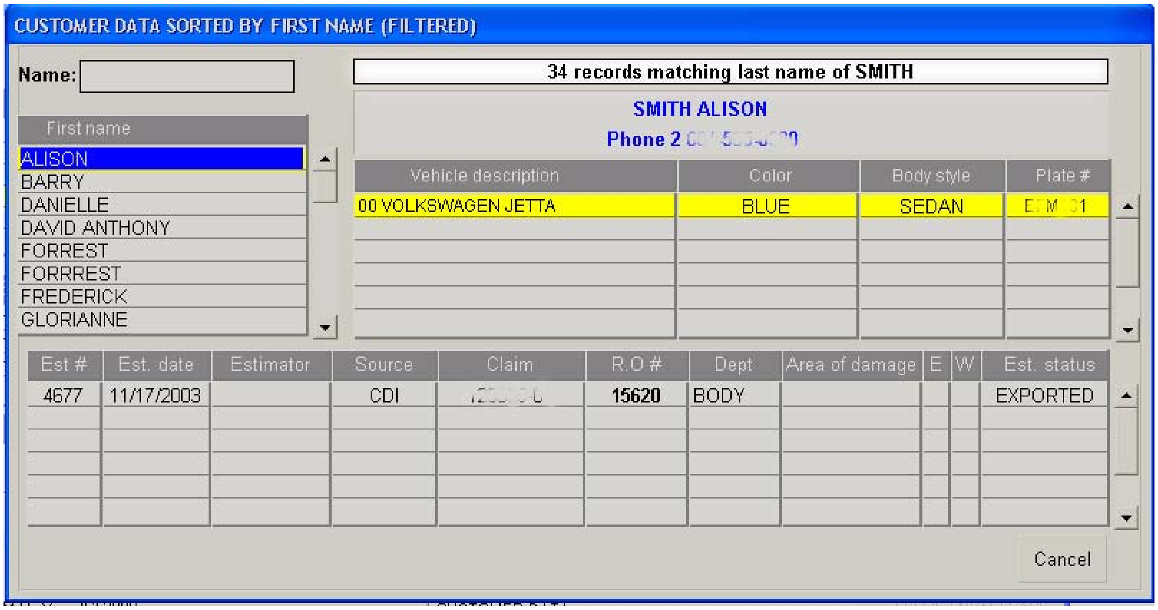


Figure 3.2

3. All customer records matching your filter criteria (“Smith” in this example) are displayed. Record count is visible at the top of the screen, currently showing 34 matches.
4. Start typing the first name of the customer, only records meeting your progressive search criteria will be shown. (*see figure 3.3*)

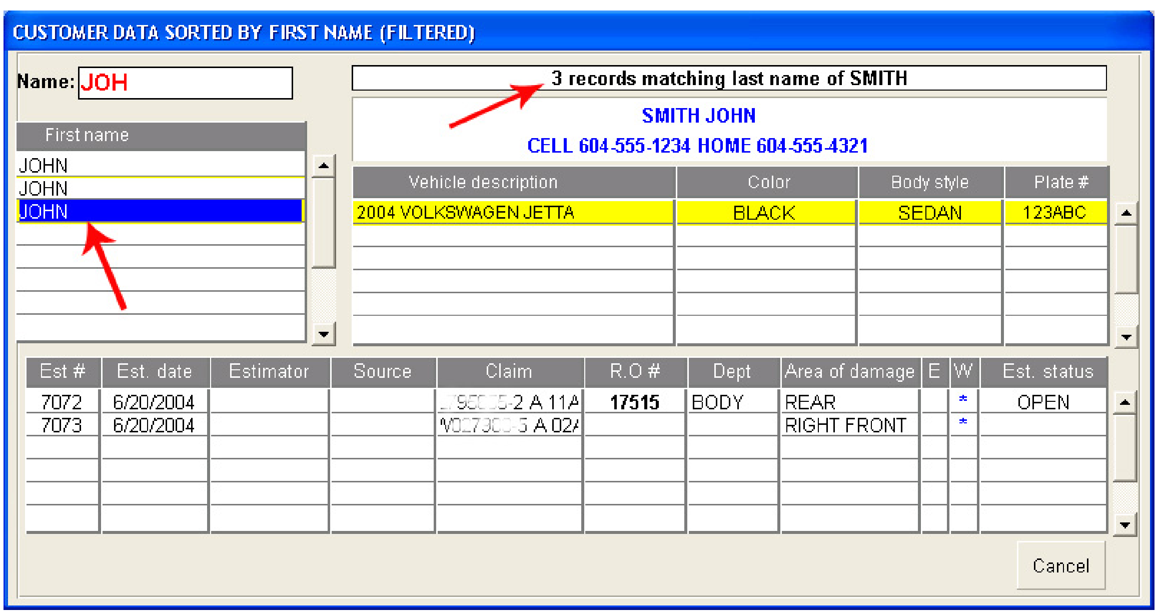


Figure 3.3 records filtered by first name

5. As you type the first name, the record count will be updated to show only the number of records meeting your current filter criteria. Select the correct customer record by left clicking the customer’s first name, and press the “Enter” key on your keyboard. You will return to the previous screen, with the selected customer highlighted. All records linked to the selected customer– vehicle data, estimates and repair orders, estimate notes and rental information - are displayed.

   Also see the “Searching customer records” chapter for other ways of locating customer data.

To locate customer records using customer's last name:

1. Open the main "Customer data" window. This window open automatically every time you start the ImEX shop management software, or click "Customers" on the top drop down menu, then left click "Find customer records" menu item. (see figure *4.1*)

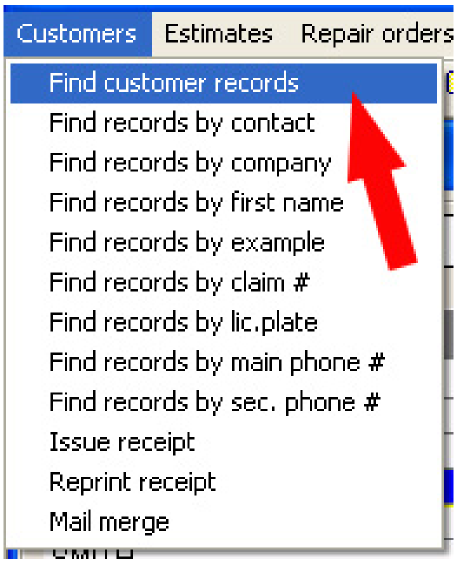


Figure 4.1, Open "Customer data" window.

2. Once the "Customer data" window opens, simply start typing the last name of the customer for whom you wish to locate records. This window uses a "Progressive search" method – only records meeting your current search criteria are shown. For example, press the letter "S" on your keyboard and all customers that have their last name beginning with this letter will be shown. Then press the letter "M" on your keyboard, and only customers that have their last name beginning with "SM" will be displayed. Pressing more letters will narrow the search even more. Simply press "Backspace" key on your keyboard to erase the filter one character at a time. Note that the cursor can be located anywhere on the screen, the program will intercept your input regardless of the cursor or mouse location – providing that the "Customer data" window remains the 'active' window. All records linked to the selected customer– vehicle data, estimates and repair orders, estimate notes and rental information - are displayed.
3. See the "Navigating records and 'Customer data' screen" chapter for more details about this window.

To locate customer's records using contacts name:

1. On the top drop down menu select "Customers" then left click "Find records by contact" (*see figure 4.2*)

Figure 4.2 Locating records by contact's name

2. The "Customer contact data" window opens (*see figure 4.3*)

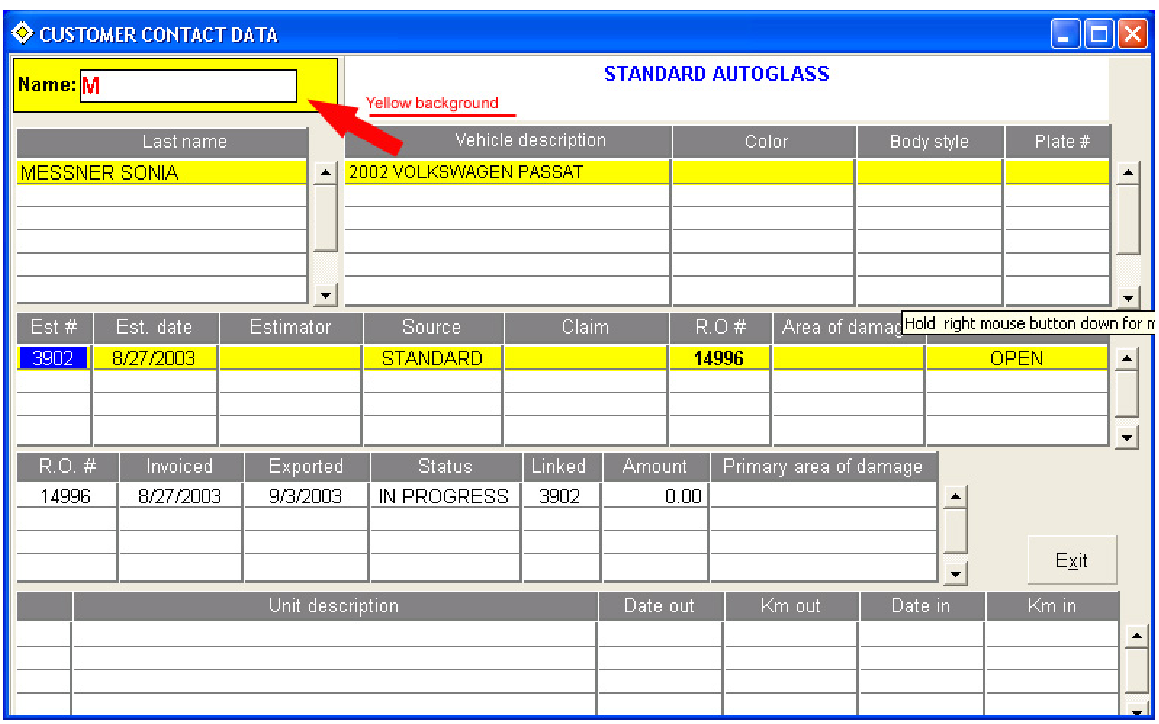


Figure 4.3 Customer contact data

3. To locate contact data, simply start typing the contact's name. See "Locate customer records using the last name" chapter for more information about progressive searching.
4. Click "Exit" to return to previous window.

Please note that although this window is similar in appearance to the "Customer data" window, the purpose and functionality differs vastly between them. To assist you in navigation, background color for the filter field has been set to yellow.

To locate customer's records using company name:

1. On the top drop down menu select "Customers" then left click "Find records by company" (*see figure 4.4*)

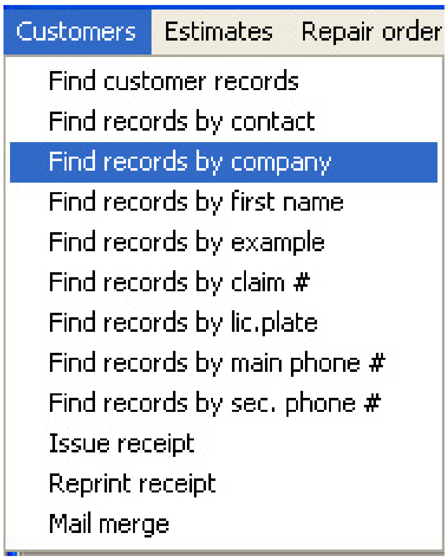


Figure 4.4 Locate records by company name

2. The "Customer contact data" window opens (*see figure 4.5*)

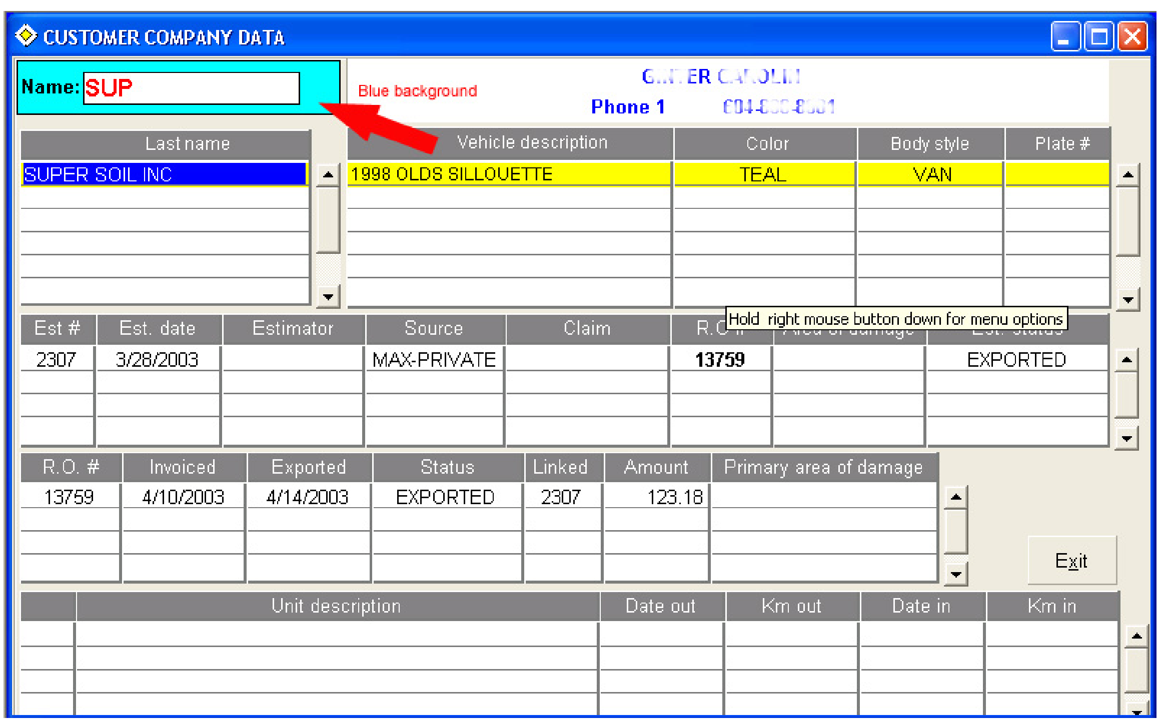


Figure 4.5 Locate records by company name

3. To locate company data, simply start typing the company’s name. See “Locate customer records using the last name” chapter for more information about progressive searching.
4. Click “Exit” to return to previous window.

Please note that although this window is similar in appearance to the “Customer data” window, the purpose and functionality differs vastly between them. To assist you in navigation, background color for the filter field has been set to blue.

To locate customer's records by claim number:

1. On the top drop down menu select "Customers" then left click "Find records by claim #" (*see figure 4.6*)

Figure 4.6 Locate records by claim number

2. The "Progressive claim search" window opens (*see figure 4.7*)

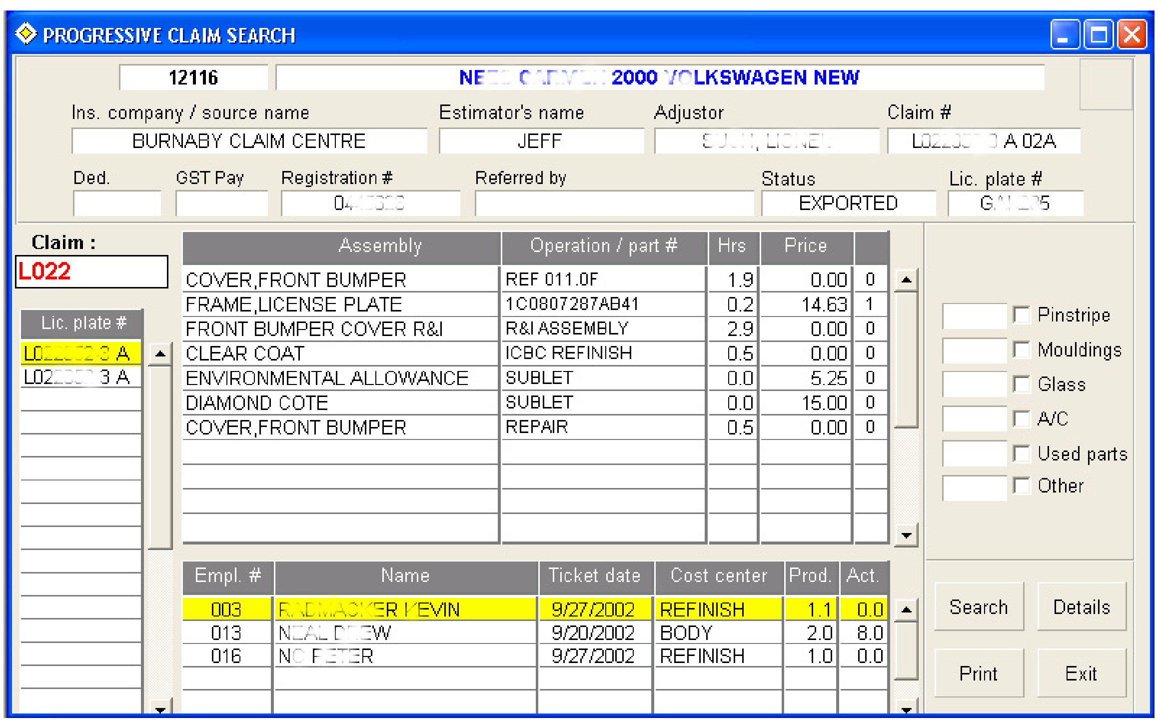


Figure 4.7 Progressive claim search

3. To locate data, simply start typing the claim number. See “Locate customer records using the last name” chapter for more information about progressive searching. The following information is displayed:
   - Customer’s information
   - Year, make, model and license plate of the vehicle
   - Insurance company, estimator and adjustor’s name
   - GST payable and deductible information
   - Repair order status
   - The estimate line details (assembly name, operation/part numbers and labor hours)
   - Estimate line status (original or supplement number)
   - Labor adjustments if any
   - Employee’s name, date worked, hours claimed and cost center for the operation

4. Click the “Details” button to view more estimate details in a new window
5. Click the “Search” button to search for a different repair order using repair order number.
6. Position the mouse on the ‘Hot Spot’ (*see figure 4.8, arrow 1*) to display more customer related information.

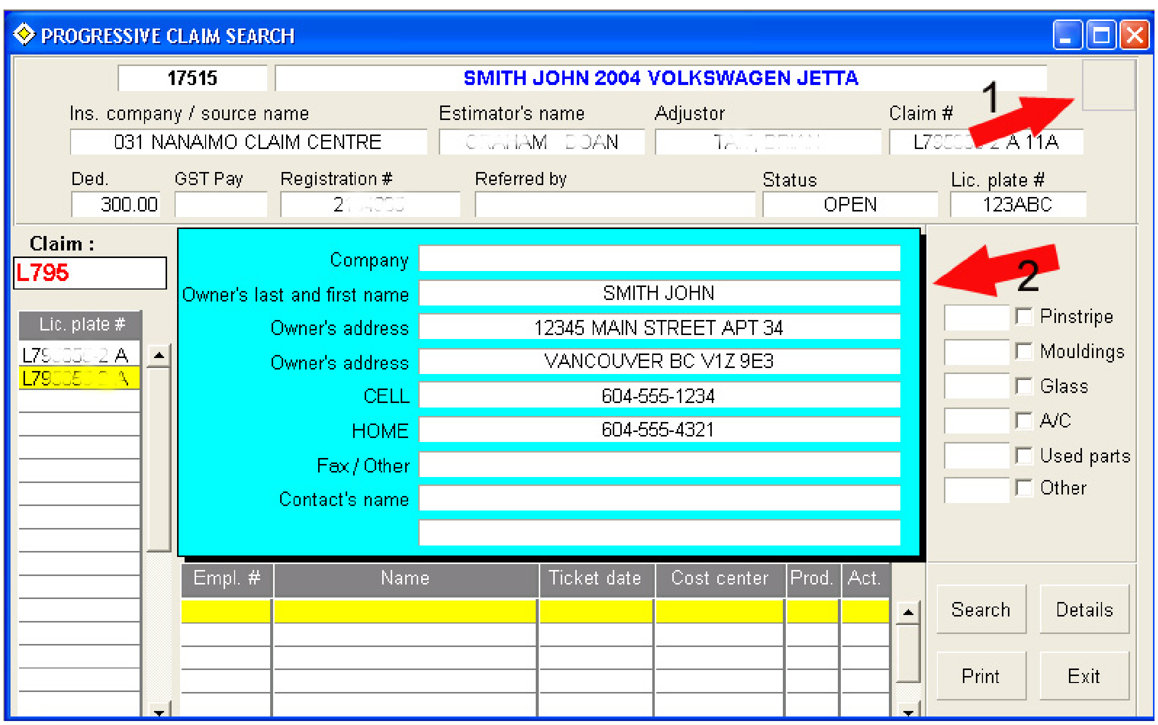


Figure 4.8 Arrow ‘1’ points to the Hot Spot, arrow ‘2’ points to additional customer information.

7. Move the mouse outside of the ‘Hot Spot’ to hide additional customer information.
8. Click “Print” to show the print menu for currently selected claim.
9. Click “Exit” to return to previous window.