# Preparing to Enter/Update Customers

There are some files that you may need to create before you can enter in your customers.

Customer Types - Optional
Sales Tax – Created in QB
Truck Routes - Optional
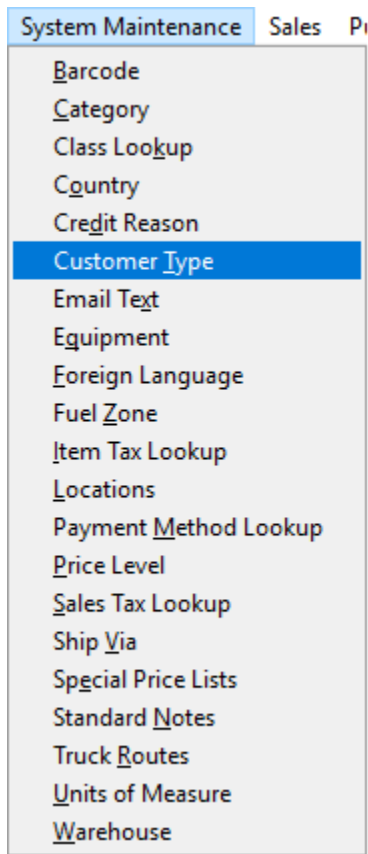Ship VIA – Must create one default
Fuel Zone – Optional
Price Level
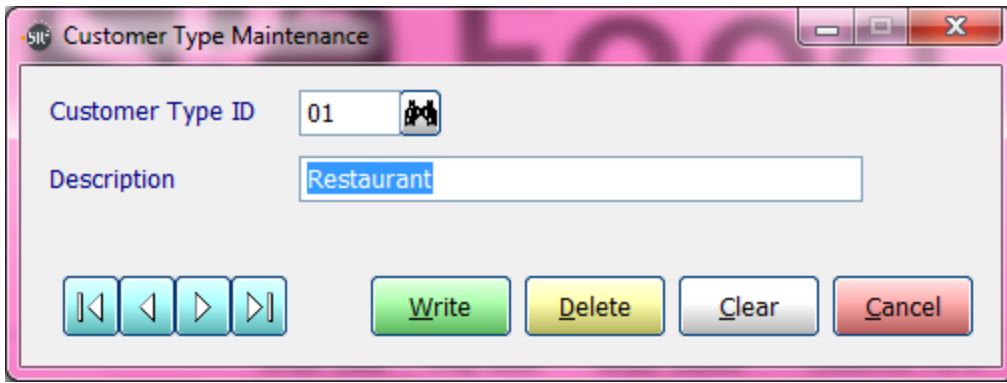Payment Terms –Created in QB
Sales Person ID – Created in QB
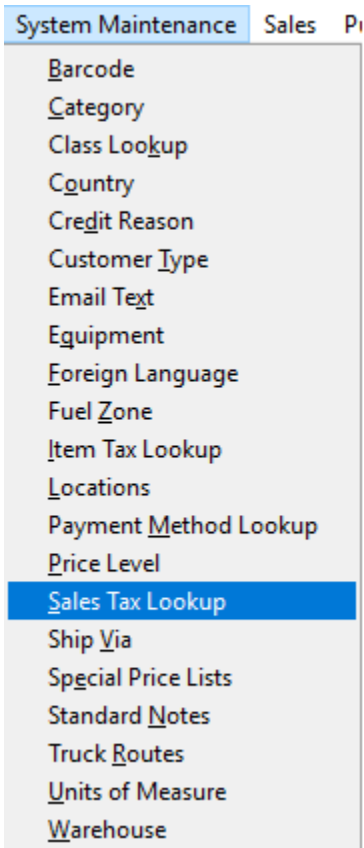Payment Methods – Created in QB

# Customer Types



You have the ability to classify your customers by type. It is for display purposes only.
Currently there are no reports that utilize this information.

**Customer Type ID:** You have the ability to enter in up to 3 alphanumeric characters.

**Description:** Enter in a description of the Customer Type ID entered.

## Sales Tax Lookup



Sales Tax ID's will be entered in QuickBooks®.
You have the ability to lookup the Tax Codes in the software.
These codes will be used on the Credit Tab in the Tax ID field in Customer Maintenance.

## Sales Tax Lookup

| | |
|---|---|
| Sales Tax ID | RI |
| Description | RI |
| Tax Rate | 7.00 |

## Tax Code Lookup

From: |

| Sales Tax ID | Description | Tax Rate |
|---|---|---|
| CT | CT | 6.00 |
| MA | MA | 6.25 |
| RI | RI | 7.00 |
| VT | VT | 7.50 |

## Truck Routes

| System Maintenance | Sales | P |
| --- | --- | --- |

Barcode
Category
Class Lookup
Country
Credit Reason
Customer Type
Email Text
Equipment
Foreign Language
Fuel Zone
Item Tax Lookup
Locations
Payment Method Lookup
Price Level
Sales Tax Lookup
Ship Via
Special Price Lists
Standard Notes
**Truck Routes**
Units of Measure
Warehouse

You have the ability to **display** up to 20 Truck Routes. The user has the ability to enter in more than 20 Truck Routes. These codes will be used in Customer Maintenance on the Routing Tab.

There are three different ways to setup Truck Routes:
1. **By Area or Geographic's**  Example: North End, Back Bay, South End
2. **By Truck**  Example: Truck 1, Truck 2, Truck 3
3. **By Driver** Name  Example: Bob, Charlie, Sam

You may also want to setup a Truck Route for customers that come into the warehouse to pick up their own orders. Example: PU for Pickup.

**Route Code:** Enter in up to a three alphanumeric code. Example: T1

**Description:** A worded description of the Truck Route. Enter in up to 30 characters. Example: North End

**Max Weight:** The maximum weight a truck can be for this Route. The system will alert you on the Truck Routing Screen. The system will highlight the pounds in Yellow as the route approaches this limit and highlights the pounds in Red when the route is over the limit.

**Max Cube:** For Future Use.

**Notes:** For Future Use.

## Ship VIA



You will utilize Ship Via if you will be using outside entities for shipping services.
This option is used in Company and Customer Maintenance. It is also used on Sales and Purchase Orders as well as prints on pick tickets and purchase orders.

**Ship Via:** Enter in up to 6 alphanumeric characters.

**Name:** The name of the vendor. Enter in up to 30 characters.
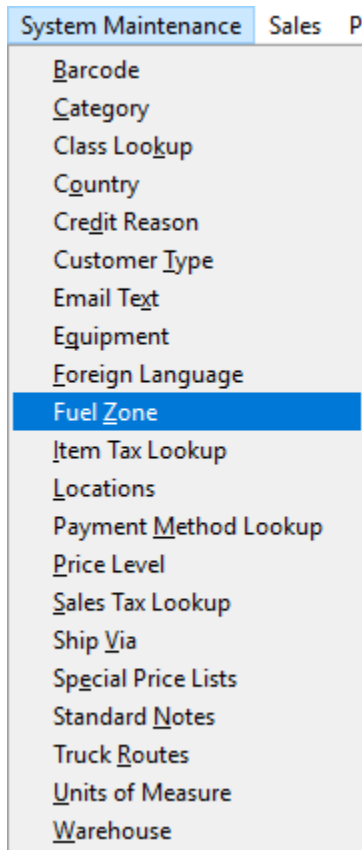
**Address 1**: The address.

**Address 2**: The second line of address.

**City**: The city

**State**: The state.

**Postal Code**: Zip code.
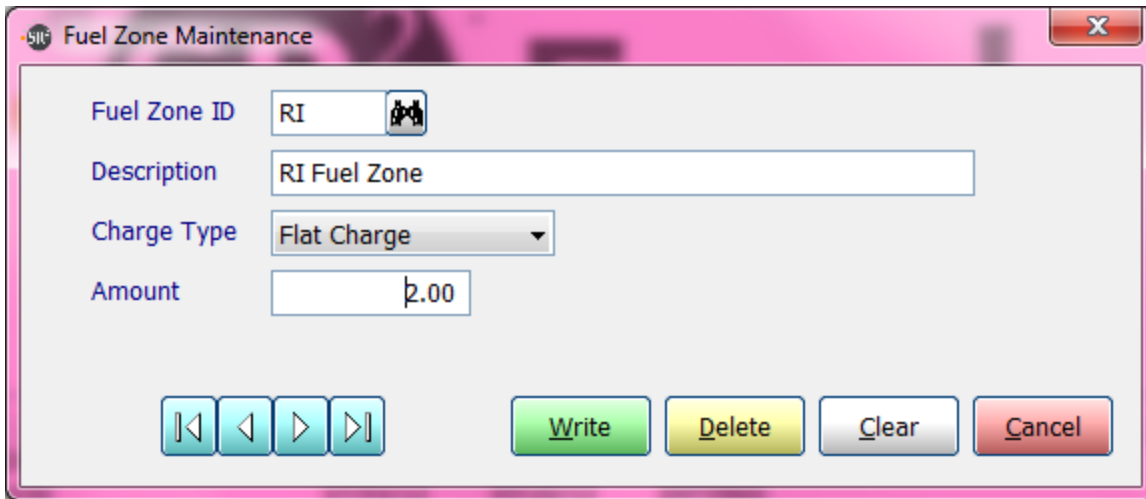
## Fuel Zones



Fuel Zones are related to fuel surcharges you wish to add to Sales Orders. You will not see the Fuel Charge line item on the Sales Order screen. It is a calculation that will print on the invoice.

Fuel Zones are used in Customer Maintenance and can also be used in Sales Orders.
This will determine the amount, if any; the customer will be billed for a fuel service fee.

See ***FUEL SURCHARGE SETUP*** for step by step instructions.

**Fuel Zone ID:** Enter in up to four alphanumeric characters.

**Description:** Enter in a description of the Fuel Zone.

**Charge Type:** Choose one of three types:

**Flat –** The amount will be a flat dollar amount that is added to each invoice.

**% of Order Total** – The amount will be a percentage that is used to calculate the dollar amount based on the order total.
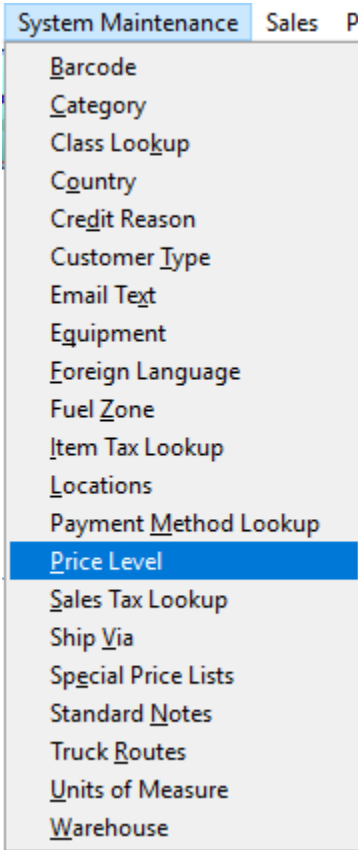
**Charge per lb** – The amount is a flat dollar amount that is calculated by the total weight of the order.

**Amount**: The amount or percentage that will be used in the calculation of the fuel charge.

NOTE: In order to correctly use Charge per lb, make sure you have accurate weights on all items.
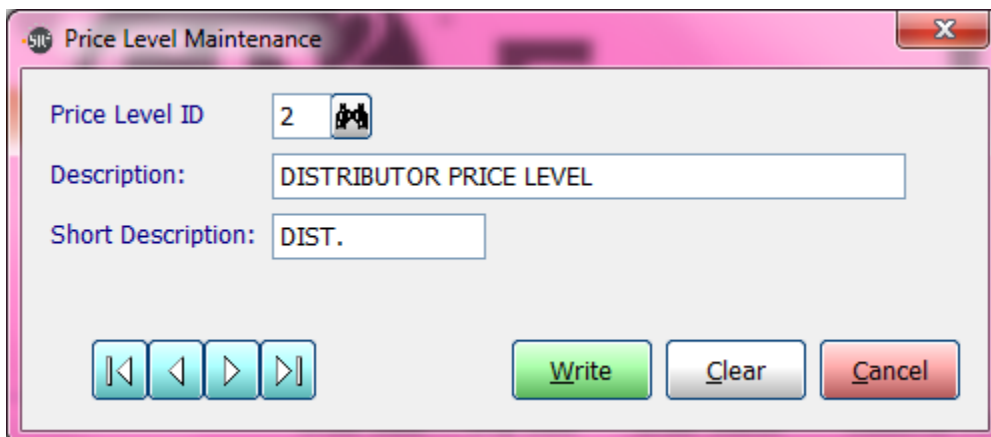
# Price Levels – Naming Price Levels



You have the ability to customize up to eight Price Levels. These will be used when you create your Customer file, Category file, and Item file and the associated pricing.

Examples:
1 = Standard Price Level
2 = Distributor Price Level
3 = Restaurant/Hotel Price Level
4 = Walk-In Price Level



**Price Level ID:** Valid entries are 1-8.

**Description:** Displays in Item Maintenance and Category Maintenance. Enter in up to 30 characters.

**Short Description:** Used on Pricing Report.

# Entering/Updating Customers



**All new Customers are entered into SR2Food Software and NOT in QuickBooks®.**



**Customer ID**: Enter in up to ten alphanumeric characters.

**Name**: Best to enter in all Capital Letters. Enter in up to 30 characters. This will print on the Pick Ticket and the Invoice

**Bill To:**

**Address 1:** Defaults to Name entered in Customer Name on this screen.

**Address 2:** Enter in the Bill To Street Address.

**Address 3:** Enter in a second line of address is needed.

**City, ST, Zip:** Enter in the Bill To City, State, and Zip code.

**Ship To:**

**Same button:** Will copy the information from the Bill To area to the Ship To area.

**Address 1:** Enter the company name.

**Address 2:** Enter in the Street Address.

**Address 3:** Enter in a second line of address if needed.

**City, ST, Zip:** Enter in the City, State, and Zip code.


**Sales Rep ID:** The sales representative assigned to this customer. The codes are built in QuickBooks®. SR2Food adds the letter S in front of the Sales Representative when we map it from QuickBooks®. The Sales Rep will default on the Header Tab in the Sales Order Screen. Required

**Customer Type ID:** Type of customer. These are built in System Maintenance. Optional

**Ship Via:** Default shipping entity for this customer in the Sales Order Header. Optional

**Fuel Zone ID:** Assign an appropriate Fuel Zone for this customer if applicable. The Fuel Zones were built in the System Maintenance. This will default in the Sales Order Header Screen. Optional. See ***FUEL SURCHARGE SETUP*** documentation.

**Foreign Language ID:** If you are using foreign language for this customer choose the correct ID.

**B2B Cut Off Time:** Specify the cut off time for this customer to enter a current day order in B2B. This time will override the company default setting.

**Active Box:** You can uncheck the Active Box and the system will exclude this customer from reports.

# Contact Tab

This is the tab where you will be entering information about how to contact the customer.



**Phone Number:**  The telephone number for the customer. This number prints on the Pick Ticket and Invoice in the Sold To Section.

**Alternate Number:** An alternate telephone number for the contact.

**Fax:** The fax number for the customer.

**Email:** The e-mail address for the customer if you want to email Sales Order Invoices. The Credit Tab in Customer Maintenance needs the box for Email checked for Invoice Delivery Method. Every PC/Laptop must have Microsoft Outlook and Adobe Acrobat Reader loaded in order to send emails. The Microsoft Outlook Version has to be chosen in Company Setup for the 2nd Parameter Tab. You can separate emails by using the **;** (semicolon).

**Contact Name:** The main contact for this customer. This name will print on the Pick Ticket and Invoice in the Sold To section. You can exclude this name from printing on an invoice in Company Maintenance, Invoice Tab, Show Contact Box.

**Alternate Name**: The name of the alternate contact.

**Statement Email:** The e-mail address for the customer if you want to email statements. The Credit Tab in Customer Maintenance needs the box for Email checked for statement Delivery Method

**Statement Fax:** The fax number for the customer if you want to fax statements. The Credit Tab in Customer Maintenance needs the box for fax checked for statement Delivery Method.

**Additional Contact Information:** Five additional lines for any additional information about the contact.

## Credit Tab

This is the tab that contains credit, tax and pricing information.



**Price Level ID:** Enter in or use the query to choose the Price Level for this customer. These were built in System Maintenance. This will default on the Header Tab in the Sales Order Screen.

**Payment Terms**: The terms are built in QuickBooks®. SR2Food adds the letter T in front of the terms when we map it from QuickBooks®. This will default on the Header Tab in the Sales Order Screen.

**State Tax ID:** Choose the Sales Tax Code built in QuickBooks®.

**Taxable?:** Check this box if this customer pays taxes on taxable items.

**Resale Certificate ID:** If this customer is tax exempt, enter in their resale number or EIN.

**Credit Limit:** Enter in a dollar amount if this customer has an established credit limit. The Sales Order screen will alert the user if the customers' credit limit has been reached. This is dependent upon the End of Day process from SR2Food and update process from QuickBooks®. 0 represents no credit limit.

**Ignore Break Upcharge:** Check this box if you do not wish this customer to be charged for items that have a broken unit fee. (Broken Case or Fractional Case charge.) These charges are setup in the system by Item on the Costing/Pricing Tab or by Category in the bottom left hand side of the screen.

**Invoice Type:** Choices are 1, 2, or 3. This refers to your company information printed on an Invoice in the header area for this customer. Choice 1 would print information from the General Tab in Company Maintenance. Choice 2 would print information from the Type 2 Tab. Choice 3 would print information from the Type 3 Tab.

**Discount %:** Enter in a discount percentage that this customer will receive on all items. Keep in mind that the system has the ability to setup price levels by Item and by Category. The system also has the ability to setup price overrides by Item or by Category in Customer Maintenance. This will default in the Sales Order Header Screen.

**Open Balance:** Display field only. This is the customers open balance in QuickBooks®. This is dependent upon the End of Day process from SR2Food and update process from QuickBooks®.

**Customer Pricing Link:** This field will link this customer to another customer's special price list. For example: G&L Foods also has an entity named SuperFoods. You can choose G&L Foods to display in this field and SuperFoods will use G&L Foods pricing.

**Credit Status:** This option will allow you to state what credit status the customer is at, the choices are Normal, Hold: sales orders can be created but cannot be invoiced, Suspend; sales orders cannot be created.

**Special Price List:** Choose the special price list that will be associated with this customer.

**Master Billing Account:** Select the customer that all invoices for this customer will be sent to when the invoice is transferred to QuickBooks.  Used with chains that will send you one check for all locations.

**MBA Individual Statements:** If this option is checked when you run statements in $SR^2$ Food you will get the statement for the individual location and not all location on the master billing statement.

**Credit Card Info Area:** This is currently a display only area

**Invoice Delivery Method:** You can print, email, or fax an invoice. The Customer's email must be entered in Customer Maintenance in the Contact Tab. Every PC/Laptop must have Microsoft Outlook and Adobe Acrobat Reader loaded in order to send emails. The Microsoft Outlook Version has to be chosen in Company Setup for the 2$^{nd}$ Parameter Tab. You must have the Fax Module software to Fax Invoices.

**Statement Delivery Method:** You can print, email, or fax a statement. The Customer's email must be entered in Customer Maintenance in the Contact Tab. Every PC/Laptop must have Microsoft Outlook and Adobe Acrobat Reader loaded in order to send emails. The Microsoft Outlook Version has to be chosen in Company Setup for the 2$^{nd}$ Parameter Tab. You must have the Fax Module software to Fax Invoices.

**Price List Delivery Method:** You can email, or fax a customer price list. The Customer's email or fax must be entered in Customer Maintenance in the Contact Tab. Every PC/Laptop must have Microsoft Outlook and Adobe Acrobat Reader loaded in order to send emails. The Microsoft Outlook Version has to be chosen in Company Setup for the 2$^{nd}$ Parameter Tab. You must have the Fax Module software to Fax Invoices. **This option only works with the Price List by Customer report.**

## Routing Tab

This tab contains routing information and the time of day a Sales Representative should contact the customer.



**Route:** Choose the route from the routes that were built in System Maintenance, Truck Routes. Use the [binocular icon] to display the routes for the appropriate day of the week. If the route is blank, the system will default to the Ship Today parameter in Company Maintenance, Parameter Tab to determine the date of the route in the Sales Order Header Tab.

**Stop:** Enter in the stop number on the truck route for this customer for the days of the week. We suggest that you number your stops using increments of 10. For example if you know the client is usually the first stop, enter in 10 in the Stop field. This will give you the ability to place another customer before this customer in the truck route if the need arises when you are in the Sales, Truck Routing screen.
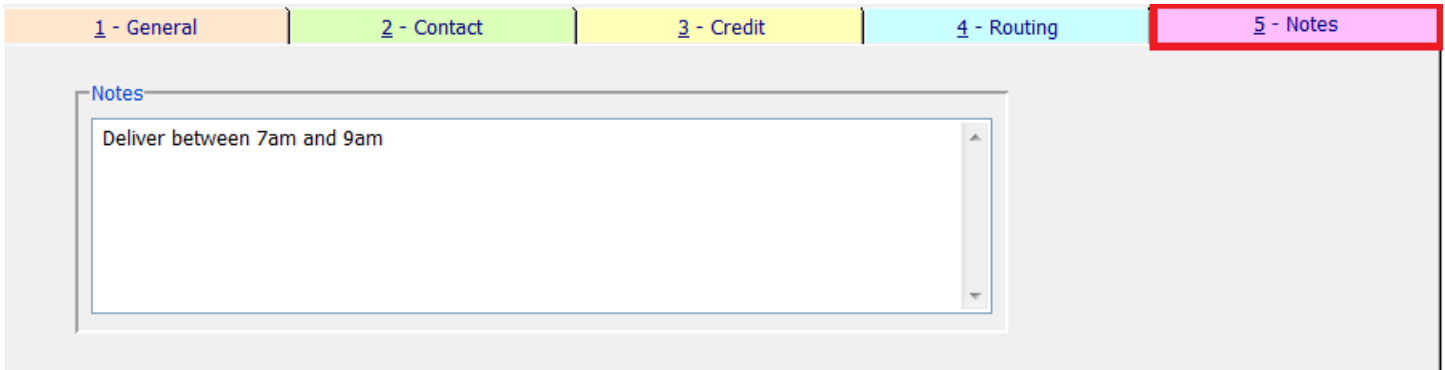
[down arrow button] This button will copy the Route and Stop information entered into Monday to Tuesday through Friday.

**Call Time:** Enter in the time of day in *military time* for the days of the week your Sales Person needs to contact this client. This information is used for the Customer Call Report.

## Notes Tab

You have the ability to enter notes on an Invoice for a customer. This note will display on the Sales Order Header Tab in the Notes Section. This note will print on the Invoice if the checkbox is marked in Company Maintenance, Invoice Tab for the parameter Notes on Invoice. This note will be the first line on an invoice.

| 1 - General | 2 - Contact | 3 - Credit | 4 - Routing | 5 - Notes |
| --- | --- | --- | --- | --- |

Notes

Deliver between 7am and 9am

When you have completed the customer entry, choose the **Write** button at the bottom of the screen to save your entry.

Write        Clear    Cancel