SETTING UP A NEW CUSTOMER IN TOWER

From Home screen

Click on Customers

Click on New Customer/Prospect

Enter Name, name 2 (if there is one, i.e. spouse), address, phone, fax = work #, & email

Click Next (see note below first)

NOTE: If billing address is different than site address, click on "customer address tab" at the top and enter mail-to information

Uncheck "same as site"

Click Next

Enter Status – from drop down arrow choose "Active Customer and Site"

Enter Customer Class – From drop down arrow, choose RES (residential) or COM (commercial)

Enter Service Area – from drop down arrow, choose Kennesaw (only option)

Tab over and Enter Account Manager – from drop down arrow choose House

Tab over to Lead source and choose how you received their application

Click Next

Uncheck "Enable Email of Collections/Past Due Notifications

Click Next

Uncheck "Email Service Notifications" & Click on "Geocode service address" once complete, click Accept

Click Finished

New account information, along with new account # (14135) will be created and showing

Adding Services:

Click on Calendar Tab

(Use Sanitation Address Routing Book to find what day each pickup for sanitation, yard debris & recycling will be)

Go to the first pickup day, whether sanitation, recycling or yard debris and right click in the date and choose "add new service"

Tab to Equipment and choose 96G from the drop down arrow, tab to Service Code and choose R96TR from the drop down arrow, Tab to Service Frequency and choose Weekly from the drop down arrow, tab to Service Rate per month and type in 24.00

Go to the "service routing" area and click on the day the sanitation pickup is and from the dropdown arrow, choose the Friday Route (if there is a check mark in the box "create work order" under Service Workflow, uncheck that box

Click Next

Enter 25.00 in "Rate" box under the service Charge Rates area (you will need to click inside the "minimum charge" box then tab over to rate to enter the amount

Click Next

Click Add (recycling)

Enter Equipment 64G from drop down arrow, tab over and enter R64REC from drop down arrow, tab over to service Frequency and enter Weekly from the drop down box, (leave service rate per month as is at 0)

Go to Service Routing and click in cell for recycling pickup day and from the down arrow, choose the route (if there is a check mark in the box "create work order" under Service Workflow, uncheck that box

Click Next

Enter 25.00 in "Rate" box under the service Charge Rates area (you will need to click inside the "minimum charge" box then tab over to rate to enter the amount

Click Next

In the Requested by" box, enter the customer's name; tab to "Reason code" and choose "New" from the drop down arrow

Click Finished

To make the deposit on the account:

Click on the icon on the bottom left that looks like two credit cards

If paid by check, enter check # in Reference # field, tab over to payment amount and enter $100.00, tab over and select payment type "Check" from drop down arrow

Make sure the box is checked for "print Payment Receipt"

In the "application Method", choose "Deposit" from the drop down arrow

Click process

If the payment is made with cash, tab over to payment amount and enter amount, tab over to payment type and choose "Cash" from drop down arrow.

Make sure the box is checked for "print Payment Receipt"

In the "application method" box, choose "Deposit" from the drop down arrow.

Click process

If the payment is with a credit card, under Credit card information, you will need to enter the full card number, 3-digit security code on back of card (4-digit on front of Amex), Expiration date, Name on card, and also enter the address information for the card.

Click the box for "save Information"

Choose Deposit under Application Method from drop down arrow

Click process (if "parameter" message comes up, click OK…this will give you the confirmation number to give to the customer)

Account is now complete

Final Steps:

Fill out a deposit slip, & complete the brochure to hand customer showing their pickup days, account # and start date

Scan in application and all backup to the customer's account

Put application in Black file box under start date