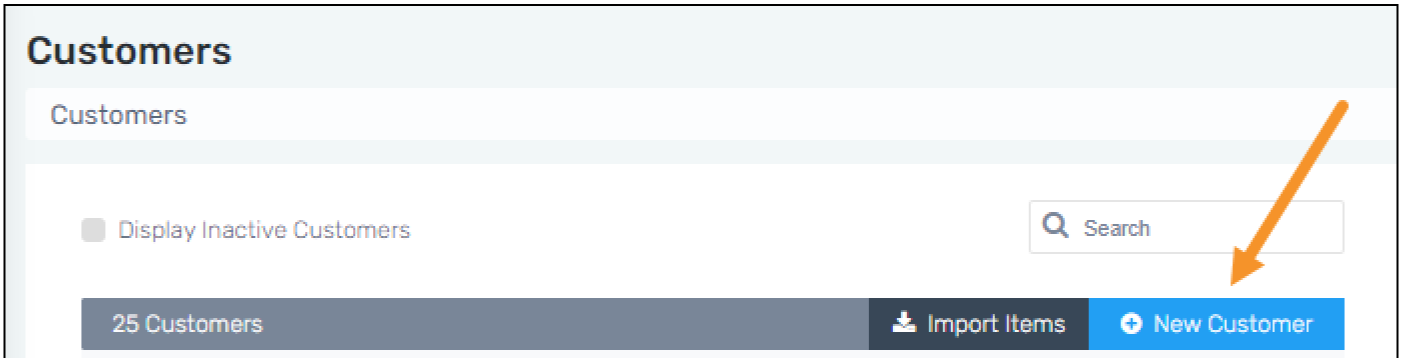
MSWhse – Creating a New Customer Profile/Order

How to Create a New Customer Profile/Order:

1. From the menu > Customers, click “New Customer” on the far-right hand side of the screen.



2. From the Add New Customer screen, enter the following information under the Profile tab:

Customer Number:

- If you are a MoversSuite customer using Great Plains for accounting, this will be your GP Customer Number. This is because you can import your monthly billing in to MSS/GP through our Generic Revenue Entry.
- If you are a QuickBooks user for accounting, this will be your QB account number as there are import tools in QuickBooks that can be used. (One of these two tools may work.)

IMPORTANT: We do not support this activity, but we have tested in import and were able to take the billing summary right in to QB Online.
https://apps.intuit.com/app/apps/appdetails?shortName=excel%20transactions&
https://apps.intuit.com/app/apps/appdetails?shortName=transactionpro&

- If you are not interested in importing monthly billing into an accounting system, use any number you wish, such as Local Order Number, Van Line Number, etc.

Customer Name:

- If this is a commercial account, enter the name of the person you are billing, such as “ABC Corp.” It can also include project names, if you wish, such as “ABC Logistics – Project Name” or “ABC Logistics – Hilton Garden Inn GJT.”
- If it is a Household Goods Shipment, it will be the customer’s name. *Example: Doe, John OR John Doe.*

Type: Choose from the dropdown one of the following:

- Household
- Commercial
- Record - MSWhse is not a record storage system that provides file level access, handling out and handling in of the same item with a variety of different rates for the actions completed. We have a few customers who use it for minimal Records Storage, however not to the full extent of Records Storage tracking/management.)
- Special - This is typically for internal equipment (library carts, packing material, etc.)

Salesperson: Optional: use this field to set the Sales Representative’s Name.
Note: Enter any notes pertaining to the storage/project order that may be beneficial for all parties to know.
Associated Warehouse(s): If more than one warehouse is available within MSWhse, choose the corresponding warehouse pertaining to this Company Name/Customer Name/Shipper Name. This will allow for this Customer Profile to only be viewable for that specific warehouse.

<u>Bill Customer:</u>

- Yes - An invoice will be generated, available to view, and available to send to customer contact.
- No - An invoice will not be generated in the Generate Invoices Tab.

NOTE: *If a customer is set up under Recurring Billing in MoversSuite, this will be turned to No as you will not be invoicing the customer from MSWhse.

<u>Billing Method Calculation:</u>

Daily High-watermark: High watermark is tracked and calculated on a daily basis.

Monthly High-watermark: High watermark is tracked and calculated on a monthly basis. **This is the typical option.*

<u>Anniversary Date Invoicing:</u> Rather than invoicing on a standard calendar month basis, MSWhse has the functionality to be able to invoice a Customer on an Anniversary date basis. For an example, if the first transaction is received on the 4^{th} of the month, all invoices will be calculated from the 4^{th} of the month to the 3^{rd} of the following month. To set this functionality, click to Yes.

<u>Weight Per Transaction:</u>

- If the Customer Profile is set to invoice by the full transaction weight in and the full transaction weight out, which is typical for Household goods shipments, this will be marked to YES. If YES, a storage base rate method will be required. Handling in and Handling out base rate methods are optional. This is conditional to the contract for the specific customer profile.
- If the billing methods are by pallet, each item, weight by each item, etc. this will be marked to NO.

<u>Flat Customer:</u> If the Customer Profile is set to invoice by a flat rate monthly, this will be marked to YES. As an example: Sublease rates by area, Customer A pays $200.00 for storage whether they have 1 box or 400 boxes within storage.

<u>Customer Reference:</u> MoversSuite Order Number or Internal Order Number.

<u>WRR Number Required:</u> The box will be checked if a Warehouse Receiving Report Number will be required for each transaction. If checked, then the Auto Generate WRR Number becomes active.

- Auto Generate WRR Number: Box will be checked if MSWhse will be entering the WRR Number in a sequencial order.

Prefix: The Beginning Characters of the WRR Number for auto generation (*Example: DOE)*

Next in Sequence: The next number in sequence for entry. *(Example: 200)*

Based on the above example, the next WRR Number for a transaction will be DOE-200.

<u>Invoice/PO#</u>: If any details are required on the generated invoice for reporting/tracking purposes for the Customer, enter the data here, such as Contract Number, etc.

<u>Included Items for Invoice:</u> If any standard monthly invoice charges are required, these fields will be completed as follows:

Code: MoversSuite Item Code (Example: 1501)

Description: What will be printed on the Invoice (Example: Storage Valuation)

Amount: The Dolalr amount *Dollar sign not required (12.50)

Invoice will then read as follows: Storage Valuation $12.50

<u>Shipping Details:</u> This is for any shipping details pertaining to the storage/project order that may be beneficial for all parties to know.

<u>Number of Business Days Required For Outbound Delivery:</u> If “Customer Facing Web Access” is granted to a customer and dependent on roles and permissions, they may be able to submit deliver requests of items. This fields allows to you to indicate how many business days will be required for the warehouse to sufficiently pull, prep and deliver/release the product.

3. Click the Blue Next button in the lower left corner of the “Add New Customer” screen (or click the Contac Info header to open that tab.)
4. From the Contact Info tab, enter the following:

<u>Customer Details</u>: Enter the Address in the appropriate fields. This is the physical address of Customer.

<u>Different Billing Address</u>: If billing address is different than physical address, check this box and enter the billing address.

Send Invoice by Email: If checked, please enter the email address the invoice will be automatically emaileed to when the month is finalized and closed.
Contact Person:
Name: Contact Name
Email: Contact email address
Phone Number: Contact phone number
Job Title: Contact Job Title
Receive Features Notifications from: If this contact will be receiving email notifications when inbound, outbound and/or adjustment transactions are completed, click the dropdown and check the appropriate boxes.

5. Click Save. The Customer Profile has now been created.

Additional Instructions:

To add additional Contacts:
Click on the Company Name/Customer profile.
Click the Second Tab (Contact Info) and click " + New Contact."
Enter the required information.
Click Save.

To authorize Customer Facing Web access:
Click on the Blue Pencil to the right of the contact's name to edit the contact.
Check the Box "Access on Customer Facing Web."
Click Save. The Contact will receive an email with a link to set their password to MSWhse.

To set Custom Rates:
Click on the Custom Rates tab, which is fourth from the left.
Click " + Add Rate".
Choose the desired Base rate method.
Enter the minimum amount.
Enter the standard charge.
If necessary, update the Effective Date Frame entry.
Click Save.

To set any Customer Additional Charges rates:
Click on the Additional Charges tab, which is fifth from the left.
Choose the appropriate warehouse from the drop down.
From the Standard Additional Charges list, click the blue pencil to the right of the additional charge you wish to change.
After a new box populates, click the "Set a Customer Charge" box.
If necessary, update the Customer Description.
Enter the Custom Charge.
Click Save.