4.9 Customers

**Understanding the Basics:**

Customers are the people you service or sell to. Think broader than a traditional customer here, this is customizable to your information needs and what you call your people: clients, patients, contacts, members, patrons, students, etc. Whether your customers buy goods/services from you or you just need to track data, the customer section is a powerful tool for managing your customer relations and information.

Customers are one of the 12 Main Players in adilas and they connect with many other pieces in adilas. A great deal of information can be held on a customer’s record, including unlimited customer log notes, additional contacts, ties to elements of time, how much they owe you and much more. Customers are generally associated with invoices for selling products or services. From there they tie into Accounts Receivable – what money you are bringing in and who still owes you. Customers can interact through eCommerce, be quoted, receive statements, hold custom data through flex grid, and much more.

**Getting Started:**

The Customer Homepage is a good place to start for adding or searching your customers. You are always prompted to first search, so as to not add a duplicate customer. The Customer/Contact Log page is your central point for customer information. This page holds all of their information, log notes, additional contacts, flex grid tie-ins, and many active links to quickly access any information you are interested in finding about your customer. Start here to add/edit or view your customer’s information.

One of the fastest ways to get to customer information is to use the Quick Search for “Customer” (the drop-down search at the top of every page in adilas). Lots of information can be used to quickly search for a customer, like any part of their name, phone numbers, email and more. When customer searches return, link directly their log, start a new shopping cart, apply payments, or a number of other options. Check out the Quick Search help file below for more tips on using the Quick Search (available from any help page).

To change the corporation-wide naming of your “customers” see the settings section below. Get to the Customer Homepage from the Classic Homepage under System Maintenance – Customer Homepage; My Favorites Homepage under Customer – Customer Home; or the Interactive Map Homepage under the customers button.

**Suggested Permissions and Settings:**

**Permissions:**

**Basic Use:**

 System Search Section: “Customer” – this permission populates your quick search with the customer option. This is one of the best tools for quickly searching customers and quickly getting to customer information from any page in adilas. The user must also have at least the “Add/Edit Customer” permission to use the customer quick search function.

 System Basics Section: “Customer Logs” – this permission provides a quick link to search the customer logs section.

 System Maintenance Section: “Add/Edit Customer” – this permission is required for 3 main customer functions. First it allows the user to add/edit any customers, customer information, log files, follow-up records, and customer images/scans (if user has photo management permission). It is required to create “customer” invoices, quotes and shopping cart function for basic customer sales. If your corporation uses the queue, this permission is also required for a user to queue a customer.

**Admin Use:**

 System Maintenance Section: “Customer Admin” – as the admin permission for customers, this allows the user to manage customer types, credit limits, exporting customer data to Excel and other settings.

**Settings:**

Settings play a large role in the customers section. This is where you name your “customers”, name/turn on your customer queue, and adapt and name information fields to record the data you need. To adjust corporation-wide settings you must have the administrative permissions to do so. For more information on settings, please see that section of the user guide.

Once you get to the Corporation-Wide Settings and Defaults page there are at least 10 settings that can be adjusted for customer info (currently near the top). Every setting has a description to help give you an idea of what this setting effects and a couple ideas of how it could be used. The “Default Customer Title Name:” and “Abbreviated Customer Title Name:” are the settings for naming what you call your “customers”. The “Customer Tax ID Title:” is another great setting to know as it has a lot of flexibility and can be renamed and adjusted for something specific you may want to track for every customer. It is also searchable as one of the customer fields in the quick search and can even be barcode generated.

**Related Pages & Help File Links:**

Customer Homepage: This is your main homepage for all of your customers. From this page you can search and add new customers and link to other customer related pages in adilas.

<https://www.adilas.biz/top_secret/help.cfm?id=70&pwd=customer>

Customer/Contact Search Results: This page shows the results of your customer search, from here you have the “add new customer” button, or you can link to any of the existing customer’s information you searched for.

<https://www.adilas.biz/top_secret/help.cfm?id=71&pwd=customer>

Customer/Contact Log: This is the main hub page for an individual customer. This is the page where you add/edit/view all of your customer data. From here you can add log notes, check the customer’s history, add contacts, add flex grid, check payment history, invoice history, and more.

<https://www.adilas.biz/top_secret/help.cfm?id=318&pwd=log>

Add/Edit Customer/Contact: This is the customer’s main information page and the form you fill in when creating a new customer or when editing an existing customer. Below the customer’s information are fields for additional contacts, these can also be added from the customer’s log page.

<https://www.adilas.biz/top_secret/help.cfm?id=72&pwd=customer>

Adilas Quick Search Help: The quick search help file is accessible from any help file page anywhere in adilas by clicking the link “[adilas “quick search” help]”. This help file is useful for learning the quick search options and key words for each search category.

<https://www.adilas.biz/top_secret/help.cfm?id=376&pwd=quick>

**Additional Content:**

 -Graphics

-Screen Shots

-Etc.