Adding Customers & Clients

Job Tracker has a built in, simplified, contacts manager system where you can create and update the details of Clients, Customers and Suppliers. Within this you can now also assign a customer to a client head office. This will then allow you to see an overview of a client, showing all assigned customers on one screen.

The Contacts screen can be accessed by clicking Contacts on the left hand side panel from the main front screen. The system groups contact information into 3 main categories 1) Customers, 2) Clients, 3). Suppliers

1) Customers: Customers are defined as the location where the work / job will be carried out.
2) Clients: Clients are defined as the job provider. I.e. Local Authority, Insurance Company, Sub Contractor etc.
3) Suppliers: Suppliers are those who you purchase goods and services from.

Adding new details is straightforward, in the details tab within the customer contacts screen click 'New Contact' on the bottom left and then enter the details in the appropriate fields. Once finished click save.

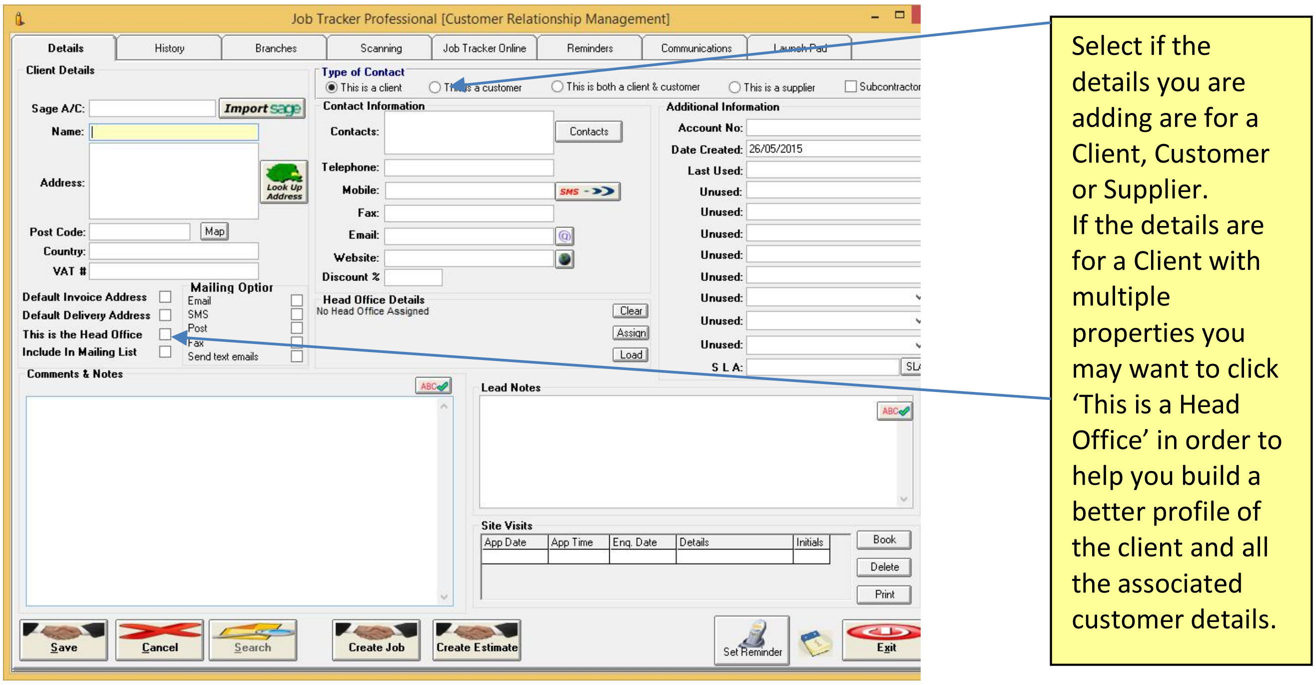

Figure 1

Job Tracker saves you time in that you will not have to enter these details again, this information will now be available to you via drop down pick lists.

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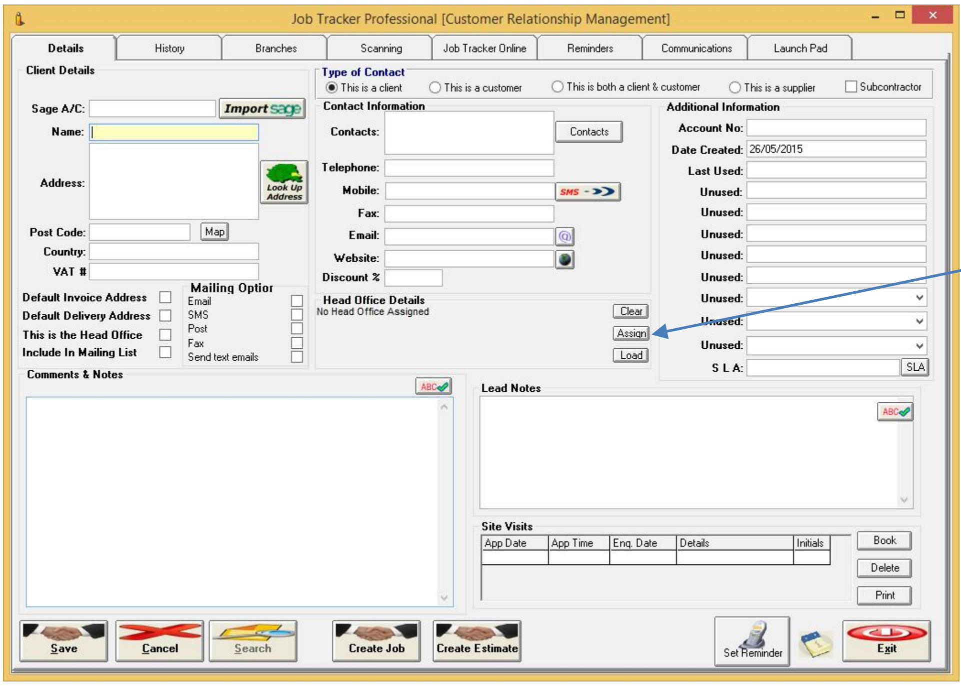
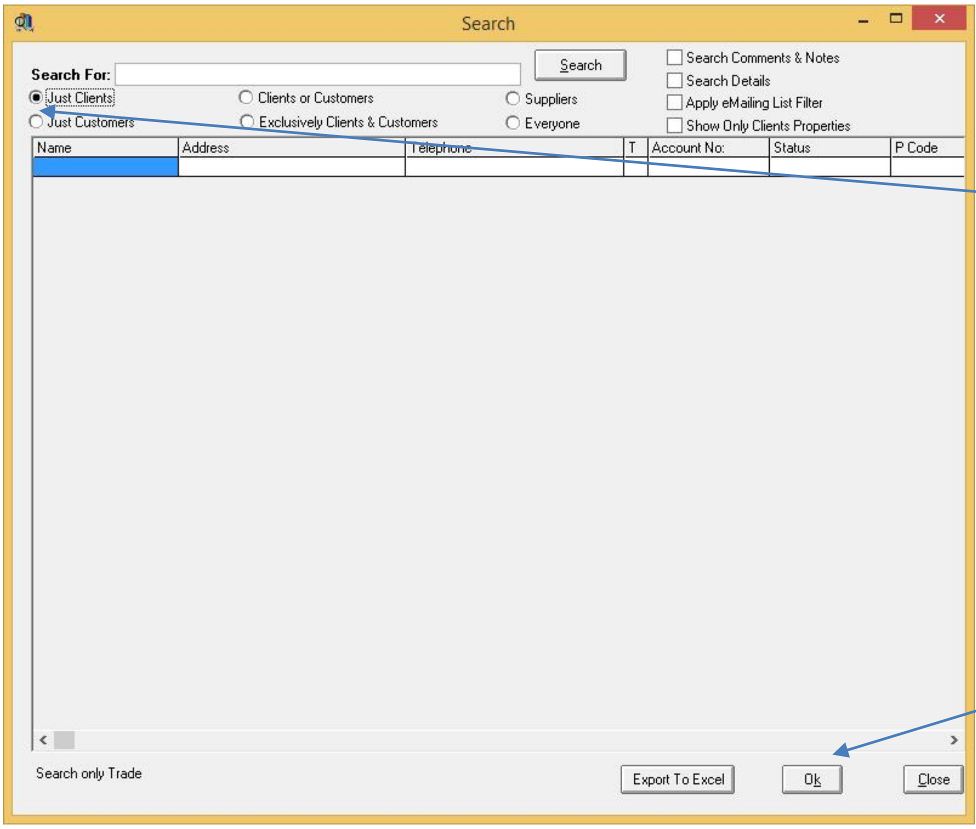
Once you have added a client as a head office by ticking the 'This is the Head Office' box, you will then be able to assign customers to that client record.



To assign a Customer to a Client Head Office, enter the customer details in the normal way then click assign.

Figure 2



This screen will appear. Select 'Just Clients' and click search. Your Clients Head Office record should show for selection. You can key their name in the 'Search For' field to narrow the results. Once the results show, highlight the appropriate record and click Ok. This will return you to the previous Client Details Screen.

Figure 3

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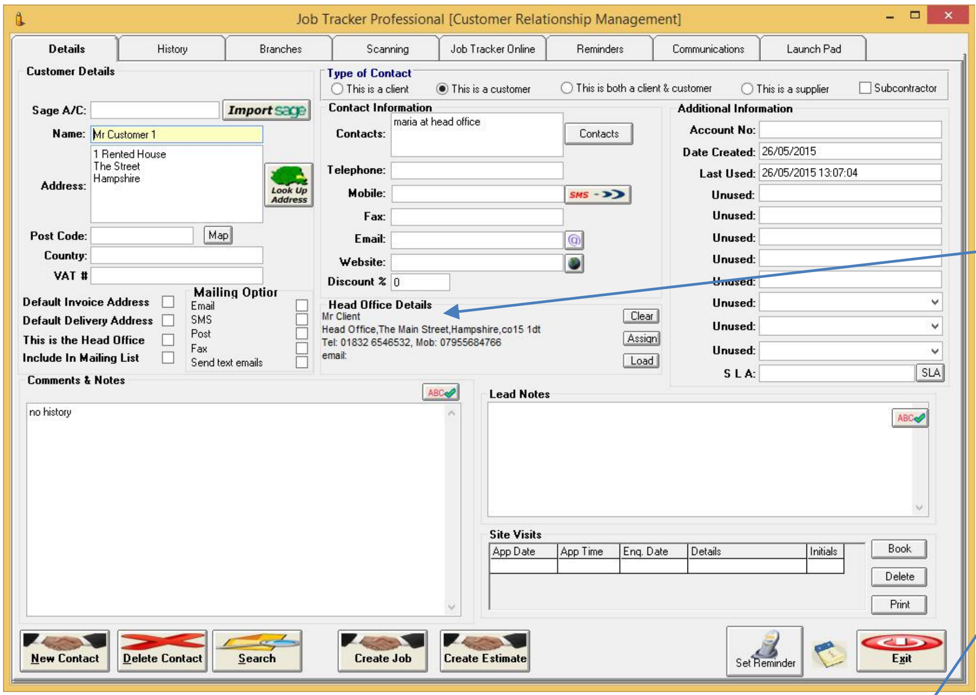

Once you have clicked assign and chosen the client to assign your customer to, the details will show here.

All details on this screen can be easily accessed from within the Job screen by clicking on the CRM link to the left of the customer contact details.

Figure 4

The client details can be viewed from the CRM link, you can then see the details of the client that the customer is assigned to. Return back to the job screen and click the client details tab to search and assign the correct client.

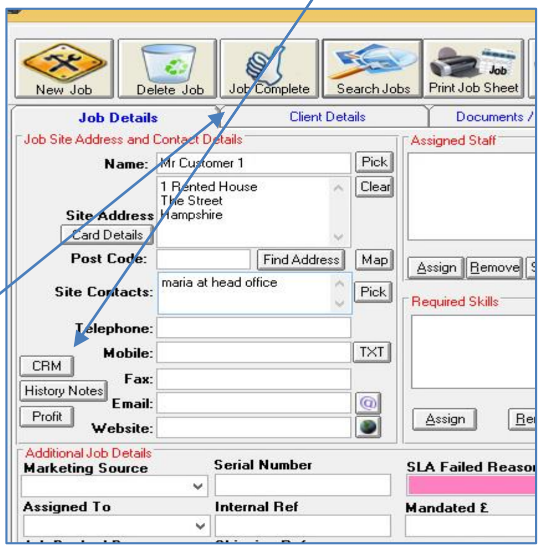

Figure 5

From now on whether you access the customer details via this job on the job screen, or via the contacts screen, the assigned head office client details should show.

Simply assigning the client within the job screen will not update the customer record to be assigned to the clients head office. The client must be assigned within the contacts screen in the way detailed at the start of this document.

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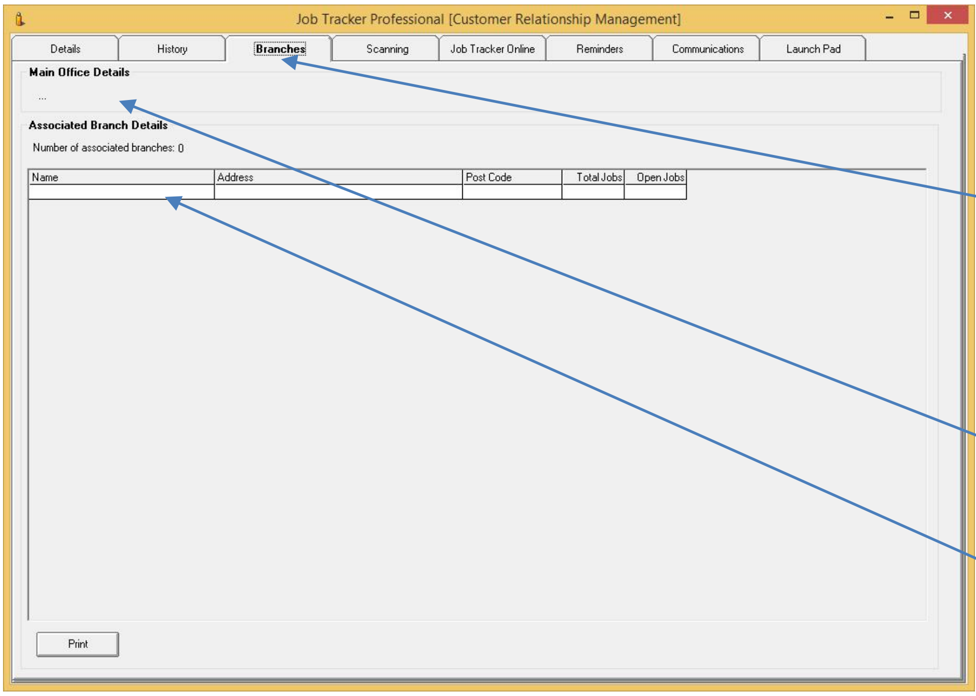

In the contacts screen, once you have searched and recalled your clients details, click the Branches tab. You will see an overview of all customers assigned to that clients head office.
The Client head office details show here.

Their customers and relevant addresses show here.

Figure 6

Once you have the list of the clients customers showing you can double click any line to immediately access that customers records.

Whilst you have the customer record on screen, you can click the branches tab and see which client head office they are assigned to.

When viewing the client details within the contacts screen, if you access the history tab, all jobs where the client has been associated within the jobs screen will show.

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