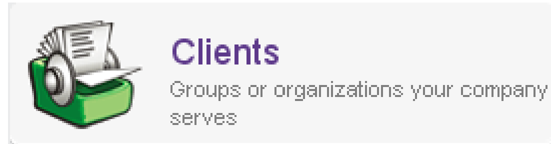
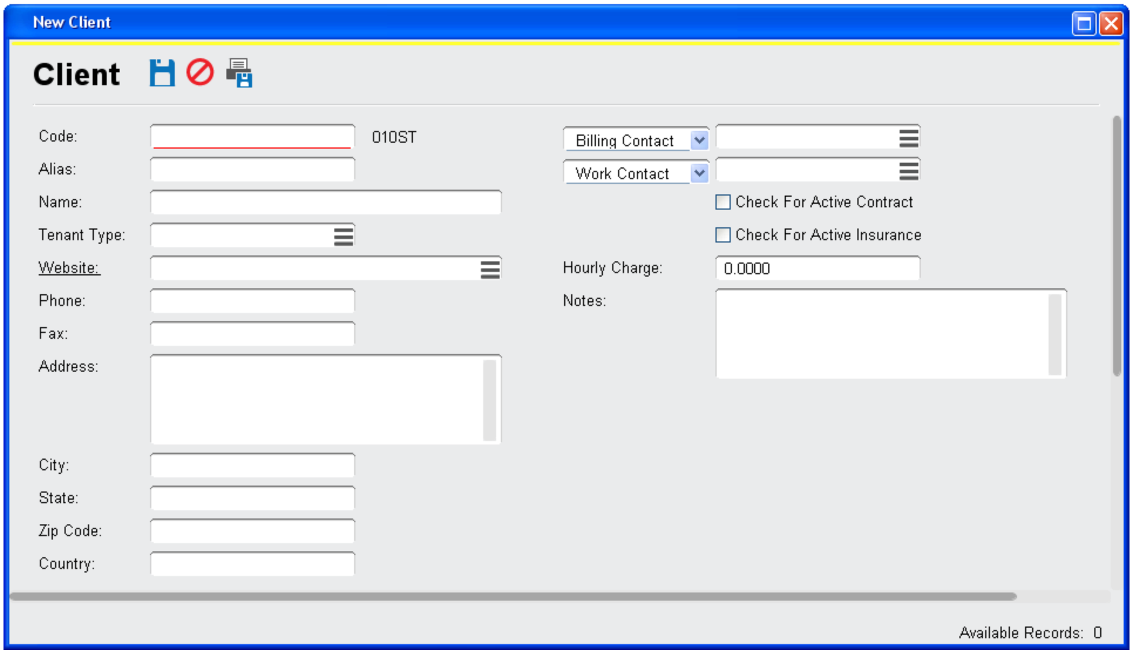
Setting Up A New Client

Quick Reference

The Client capsule stores information about the organizations that your company serves. You should create one record for each Client (regardless of how may units they occupy).



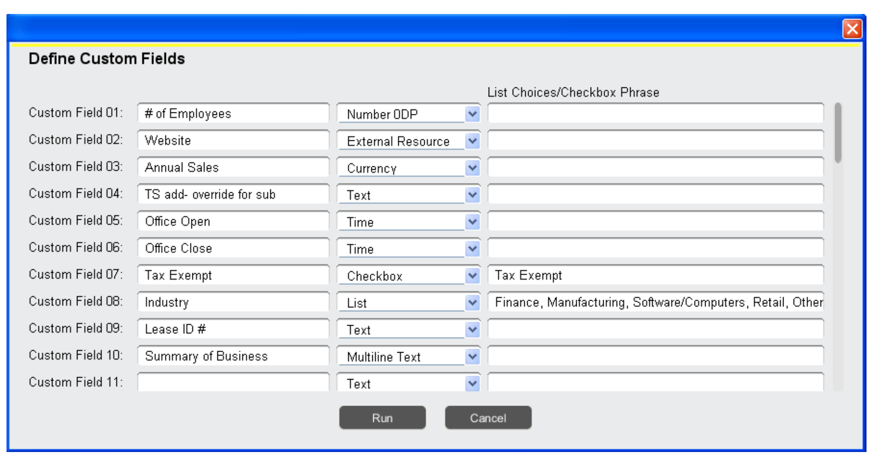


Reminders

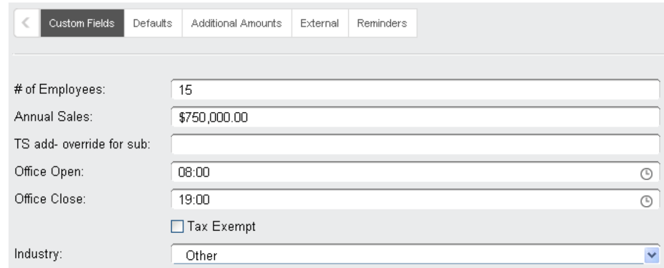
- Keep the structure of your code consistent; typically an abbreviation of the Client name
- Don't forget the Custom Fields, Additional Amounts, and Defaults tabs
- If a Client occupies more than one Unit the Unit fields should be left blank.

Each Resource capsule includes a **Custom Field** tab – giving you the ability to define up to fifty additional fields. The field titles and format of the fields are completely customizable.

Hint: Get rid of all those excess spreadsheets and documents containing various Client details – create a custom field in the AwareManager instead.



Custom Field Type options:

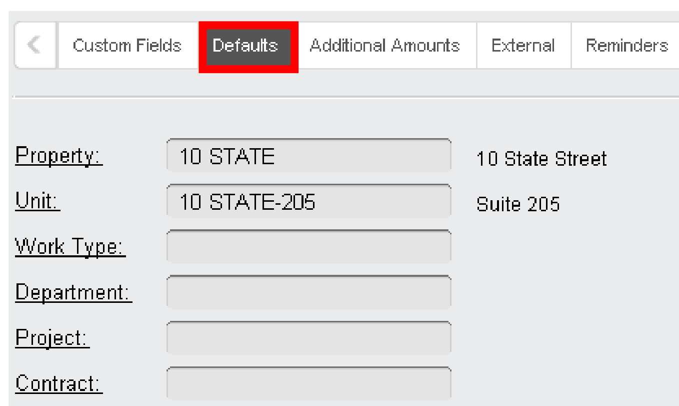


To define a custom field right-mouse click on the Client capsule and select Preferences. Then select the Operations button at the top of the window and select Define Custom Fields.

- **Text**– fields can be set to free form text field.
- **Number 0DP-4DP**– fields can be set to a number value (0-4 decimal places).
- **External Resource**– fields can be set link to either a file in another system or a web address.

  Note: Web addresses must start with "http://"

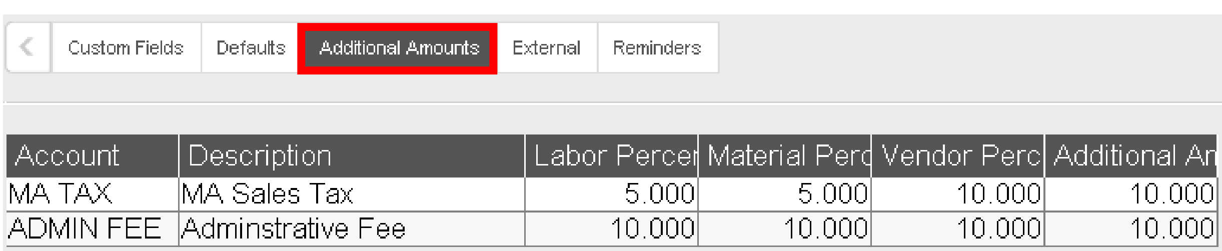
- **Number 0DP-4DP**– fields can be set to a currency value (2 decimal places).
- **Date**– fields can be set to a date.
- **Time**– fields can be set to time (note: time is entered in military time format in the system).
- **Checkbox** – this field can be used to indicate a Yes or No value related to a field title which you can determine.
- **List** – this field can be used to create a list of options from which to choose. To create the list; simply enter the items separated by a comma.
- **Multi-line Text** – this field can be used to create a text field with multiple lines (like Description and Notes fields).
- **Currency –** this field can be used to enter a currency.



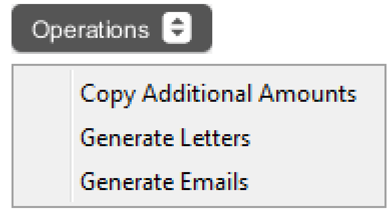
The **Defaults** tab gives you the ability to define some of the settings specific to each Client. These are the settings that will auto-populate into the records linked to your Client (specifically during entry of Contacts, *Work*, *Time*, and *Maintenance*). You can identify each Client's default *Building, Unit, Work Type, Bill Code* and *Work Notes*.

The **Additional Amounts** tab gives you the ability to define additional charges to be applied to all work orders for the Client. Typically this is used as a means for calculating sales tax and or administrative fees.

Like other capsules, the window also includes tabs for **Custom Fields** and **Reminders**.



Client Operations



- **Copy Additional Amounts –** this operation will copy the Additional Amount settings for one record to all other records in the list.
- **Generate Letters –** this operation will create a letter for a single Client or a group of Client (for complete details please view our Communication Quick References)
- **Generate Emails –** this operation will create an email for a single Client or a group of Client (for complete details please view our Communication Quick References)

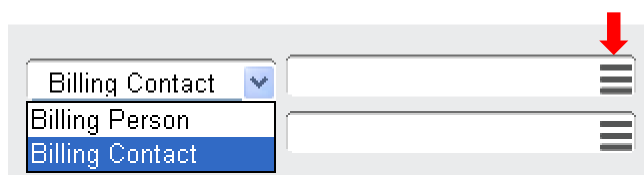
Step in Setting Up a new Client: Including Contacts and Units

1. Go to the Client capsule from the console: **Resources→Client**.
2. Add a new record by selecting the **+** icon.
3. Populate all the fields except for the Billing and Work Person fields.

Do not forget the values found in the Default tab. Defaults populate as records are added in the program linked to the Client. If a client occupies multiple Units leave the field blank.

4. Save the record.
5. Edit the record and add your Billing and Work Contact(s) on the fly from the Client record.

Billing Contact is the person to whom Invoices and Statements are addressed. Work Contact is the person who will default when work records are added. If multiple contacts will be requesting work set the combo box to Work Contact and leave the field blank.



- Go to the Billing Person field.
- Change the field to Billing Contact.
- Enter a value in the field and select tab (or click the chooser).
- Click the **+** to add in a new contact.

The contact capsule will open.

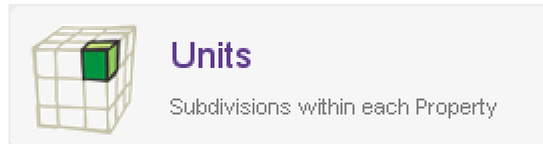
- Change the Organization field to Client and enter the Client code.

The details from the Client record will automatically default into the new contact record.

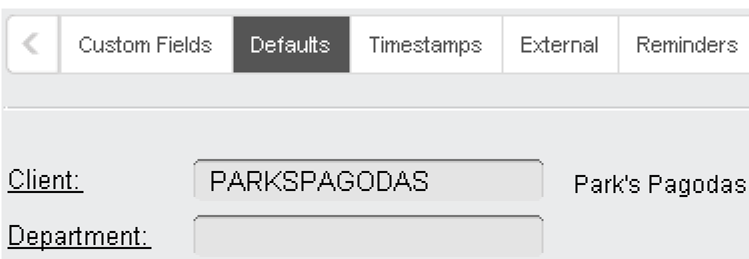
- Save the new contact (you will return to the Client record).
- Repeat the process if necessary to define the default Work Contact.

6. If you need to enter additional contacts navigate to the Contact capsule and enter each one in individually. All of the details from the Client capsule will default minimizing the time required to add additional contacts.

Updating Units



1. Go to the Unit capsule from the console: **Resources→Units**.
2. Update the Unit defaults or add in new Units if needed.
3. Go to the Resources tab and select the Units capsule.
4. Search for the Unit that they are moving into.
5. Click on the ‘key’ to the change the record.
6. Under the Defaults tab, clear the old Client from the Client field (it may be empty).



7. In the same Client field, type any letter and hit tab to select the new Client. The Client may not appear on the list since it is brand new, in this case you will need to click on the + icon at the top of the Choose Client window and “add on the fly.”
8. A New Client window will open up with the Unit record you were working on behind it.
9. Add the new client to the client capsule, by entering all of the information you know about this new client and then save the record.
10. Save the change to the Unit record by clicking on the green checkmark.

If a Client moves from one space to another:

11. Go to the Resources tab and select the Units capsule.
12. Search for the Unit that they are moving into.
13. Click on the ‘key’ to the change the record.
14. Under the Defaults tab, clear the old Client from the Client field (it may be empty).
15. Enter the client code of the Client moving into the Unit.

If the Client moving into the Unit is new and has not been set up in the Client capsule:

1. Stay in the Client field and type any letter and hit Tab.
2. Click on the + icon at the top of the Choose Client window and “add on the fly.”
3. Enter all the information for this new client.
4. Save the new client by clicking the green checkmark.
5. Save the change to the Unit record by clicking the green checkmark.

Remember: When adding a new record use the Tab key to move from field to field. The Enter key saves the record.

If a Client is moving out of a Unit and not into a new one:

1. Go to the Resources tab and select the Units capsule.
2. Search for the Unit that they are moving out of.
3. Click on the ‘key’ to the change the record.
4. Under the Defaults tab, clear their name from the Client field.
5. In the Client field type ~VACANT (if you have a “fake” client “~VACANT”) or leave it blank.
6. Save the change to the Unit by clicking the green checkmark.
7. Move to the Client capsule, edit the record and make inactive.

Hint: Some users create a “fake” client record called ~VACANT this can assist in reporting and searching. Adding a ~ as the first character will place the record at the bottom of the list, adding a * will place it at the top.