Chapter 5
Customers

Your customers are more than likely the individual schools in your district. You may also have some non-district customers for whom you perform services such as church groups, associations, non-profit groups and so on. To access the Customer Maintenance Routine open the File menu, then click Customer (Figure 5-1). The Customer Search screen will be displayed (Figure 5-2).

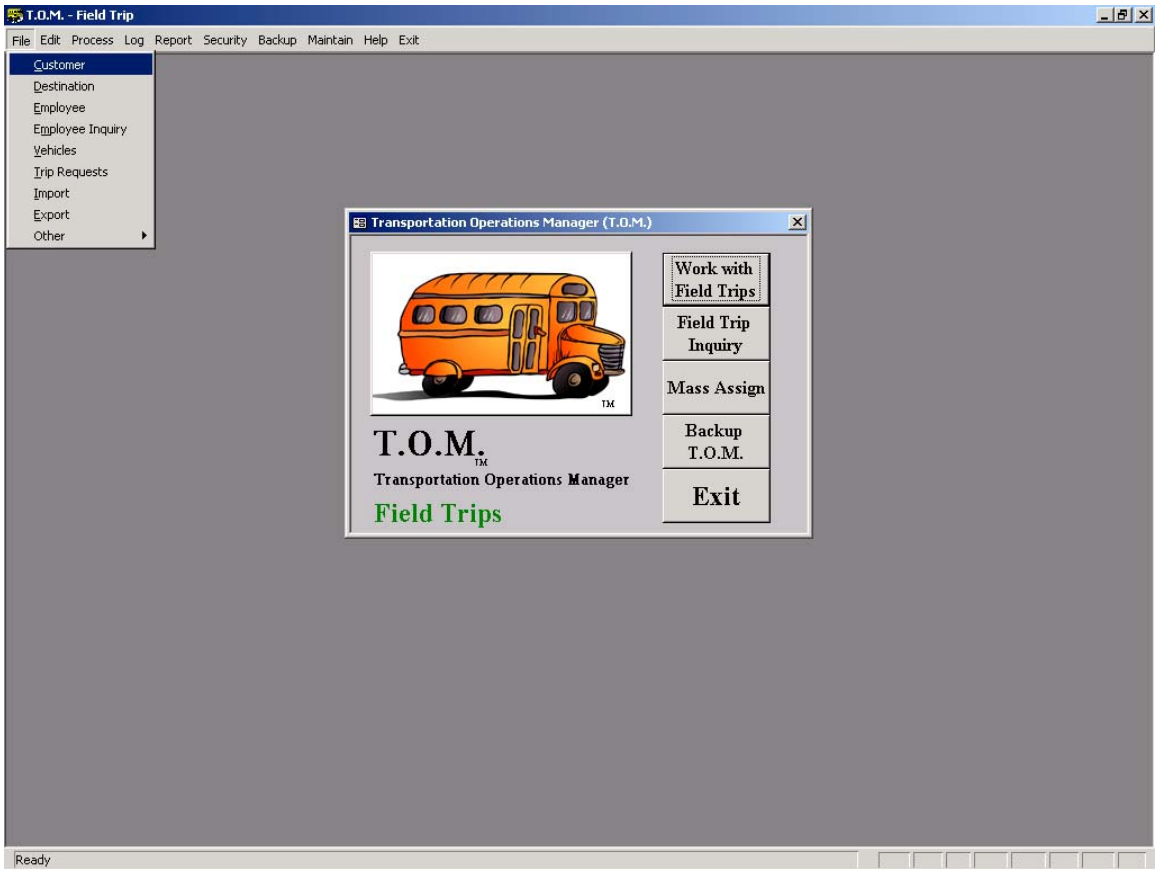


Figure 5-1. Accessing the Customer Search Screen

From the Customer Search screen (Figure 5-2), you may search for, add, change or delete customers. When entering customers you will enter information such as the customer name, address, telephone and fax as well as the customer's field trip budget (optional not required). You may also enter a special instruction that you want to print on all invoices sent to the customer (for example ATTN.: Margaret).

While entering your customers you may enter certain assumptions or defaults that T.O.M. should make when you enter a field trip for this customer. These assumptions will make entering field trips quicker and easier. You can always change the assumptions while entering the actual field trip. These assumptions are:

- **Vehicle Capacity** (High, Medium or Low)
- **Billing Rate** (What this customer will be charged)
- **Special Instructions** (Unlimited free form text of any special instructions you wish to give the driver when they arrive at the customer site.)

- **Trip Requestor, Approver and Administrator Email Addresses**

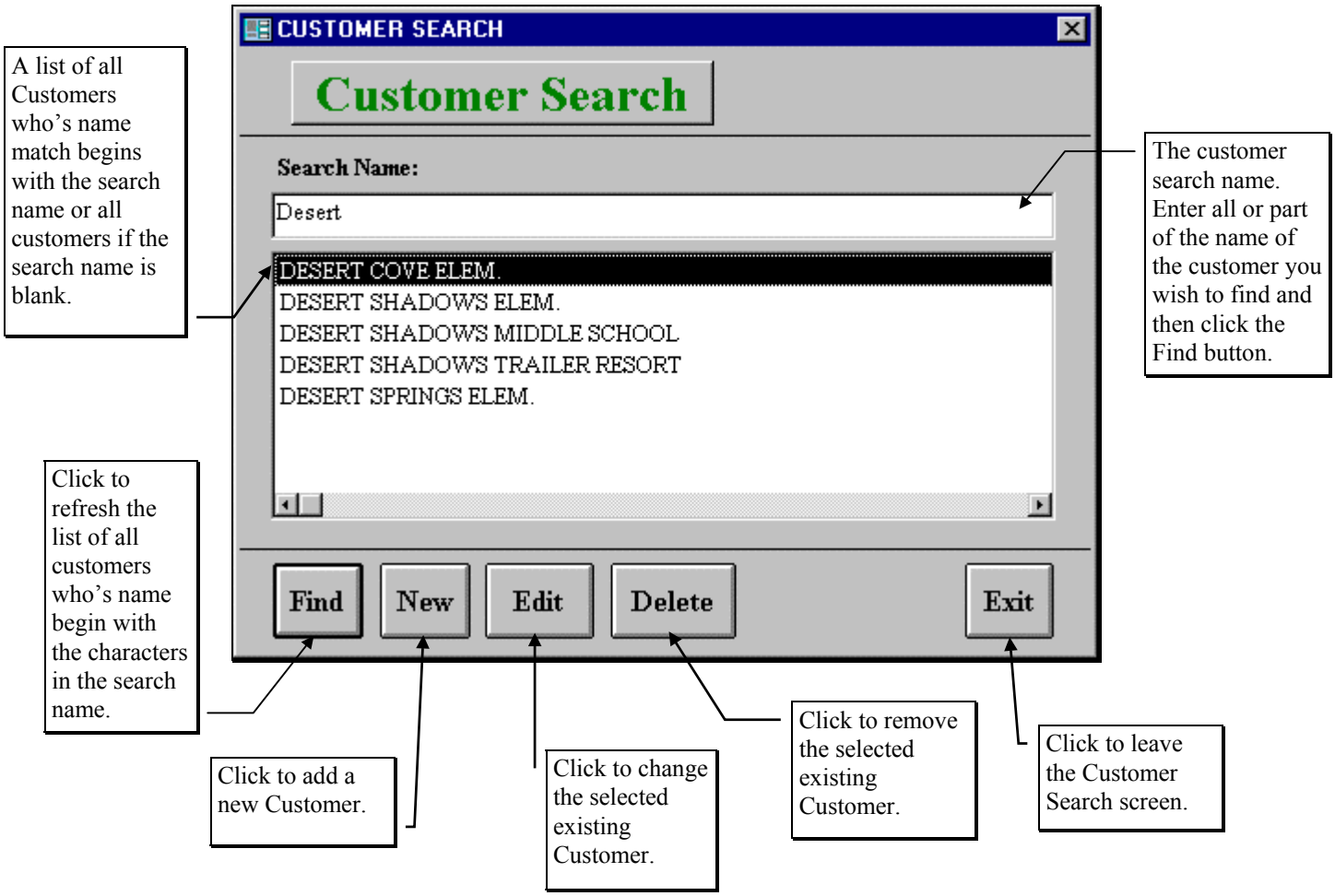


Figure 5-2. The Customer Search Screen

The Customer Search screen shows you all of the Customers that you have setup with T.O.M. From this screen you tell T.O.M. if you want to add a new Customer, change an existing Customer and remove existing Customer.

The Customer Search screen also offers you a very simple way to retrieve an existing customer record. Simply type in all or part of the customer's name and then click the Find button. After a moment a list of customers who have names matching your search name will appear in a list below your search name. If you wish to change the search name, key over the last search name that you entered and then click the Find button again and the system will refresh the list of found customers automatically. Once you have spotted the customer you desire, simply point to that name and click it and click the Edit button and you will be taken to the Customer Data Entry screen (Figure 5-3) with selected customer displayed on the screen.

Adding a New Customer

If you wish to add a new Customer click the New button and you will be taken to the Customer Data Entry screen (Figure 5.2). This screen will let you enter all of the Customer information. To save the Customer information you have entered click the OK button. To exit this screen without saving the information you have entered click the Exit button.

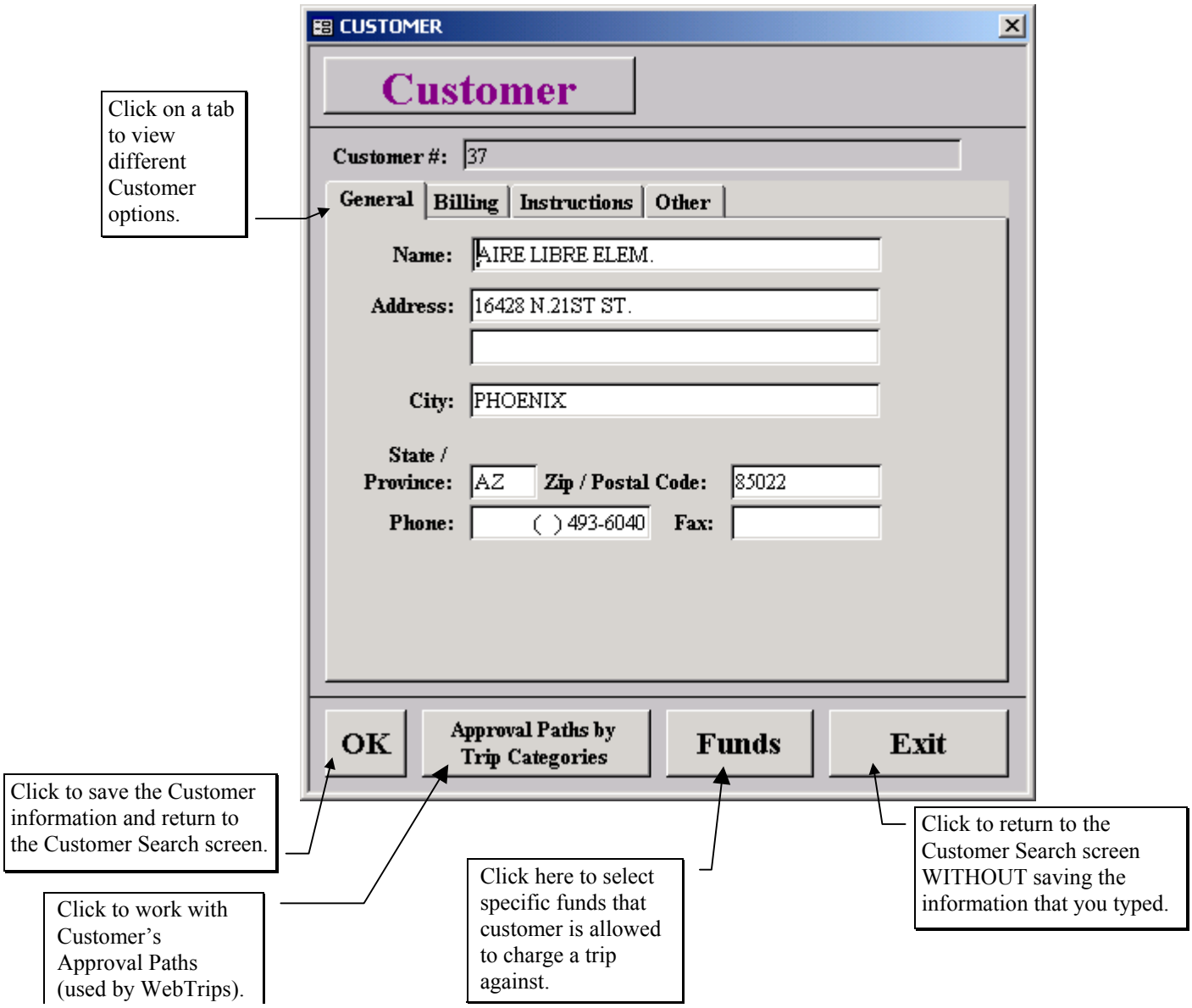


Figure 5-3. The General Tab on the Customer Data Entry Screen

Changing an Existing Customer

If you wish to change an existing Customer, select a Customer on the Customer Search screen (Figure 5-2) by clicking the row containing the desired Customer and then click the Edit button. You will be taken to the Customer Data Entry screen (Figure 5-3). This screen will let you change any of the Customer information except the Customer number. (See *Appendix D – Changing a Customer's Number* for details about changing a customer number.) To save the Customer information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button.

Deleting an Existing Customer

If you wish to remove an existing Customer, select a Customer on the Customer Search screen (Figure 5-2) by clicking the row containing the desired Customer. Then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Customer. If you do confirm to T.O.M. that you want to delete the Customer, T.O.M. will remove the Customer from your T.O.M. database. **NOTE:** *T.O.M. will not allow you to delete a Customer that is being used by a Field Trip.*

Customer Data Entry Screen Options

The Customer Data Entry screen uses four tabs to help you enter data in an organized fashion. They are the General tab (Figure 5-3), Billing tab (Figure 5-4), Instructions tab (Figure 5-5) and Other tab (Figure 5.6). Click on the tab to see its options. The following describes the data entry fields and options for these tabs.

Customer #: This is a number that is automatically generated by T.O.M. It uniquely identifies the customer to T.O.M. This number appears on the screen no matter which tab is displayed.

NOTE: You may find it necessary to renumber a customer's number for a particular reason. When you do this, all field trips and other references to that customer are changed as well. See *Appendix D – Changing a Customer's Number* later in this manual for details. Make sure you have a current backup of your T.O.M. database BEFORE using the Customer Renumber maintenance routine. (See *Chapter 10 – Backing Up and Restoring* in the *T.O.M. User Guide*.) Also, make sure you are the ONLY person using T.O.M.

The General Tab on the Customer Data Entry Screen

Click on the General tab on the Customer Data Entry screen (Figure 5-3), if it is not already displayed. This tab contains general information about the customer.

Customer Name: This is the name of your customer. It is 30 characters long. You should enter it as you wish it to appear on your reports as well as on the estimates and invoices you send to your customer. NOTE: The way that you enter your customer name here is the way you must search for it alphabetically in the Customer Search Screen. So if you enter a customer with the name of "The Foothills Elementary School", you would need to begin searching with the letter "T" or the word "The" in the Customer Search Screen. If you wanted to search for the customer by typing the word "Foothills", you would have to enter the customer name as "Foothills Elementary School, The".

Address: This is actually two lines where you enter the customer's street address. Each line is 30 characters. This address will appear on the driver trip tickets as well as on the customer estimates and invoices.

City: This is the city that the customer is located. It is 15 characters. The City will appear on the driver trip tickets as well as on the customer estimates and invoices.

State / Province: This is the state (U.S.) or province (Canada) where the customer is located. It is 2 characters. The State or Province will appear on the driver trip tickets as well as on the customer estimates and invoices.

Zip / Postal Code: This is the zip (U.S.) or postal code (Canada) where the customer is located. It is 10 characters. The Zip or Postal code will appear on the driver trip tickets as well as on the customer estimates and invoices.

Phone: This is the customer's phone number. When you enter this phone number T.O.M. automatically enters parentheses around the area code and places a dash between the third and the fourth digit of the root phone number. If you do not wish to enter an area code with the phone number then enter three spaces in

place of the area code and T.O.M. will automatically position you to the first digit of the main phone number.

Fax: This is the customer's fax telephone number. When you enter this phone number T.O.M. automatically enters parentheses around the area code and places a dash between the third and the fourth digit of the root phone number. If you do not wish to enter an area code with the fax phone number, then enter three spaces in place of the area code and T.O.M. will automatically position you to the first digit of the main part of the fax phone number.

The Billing Tab on the Customer Data Entry Screen

Click on the Billing tab on the Customer Data Entry screen (Figure 5-4), if it is not already displayed. This tab contains billing information about the customer.

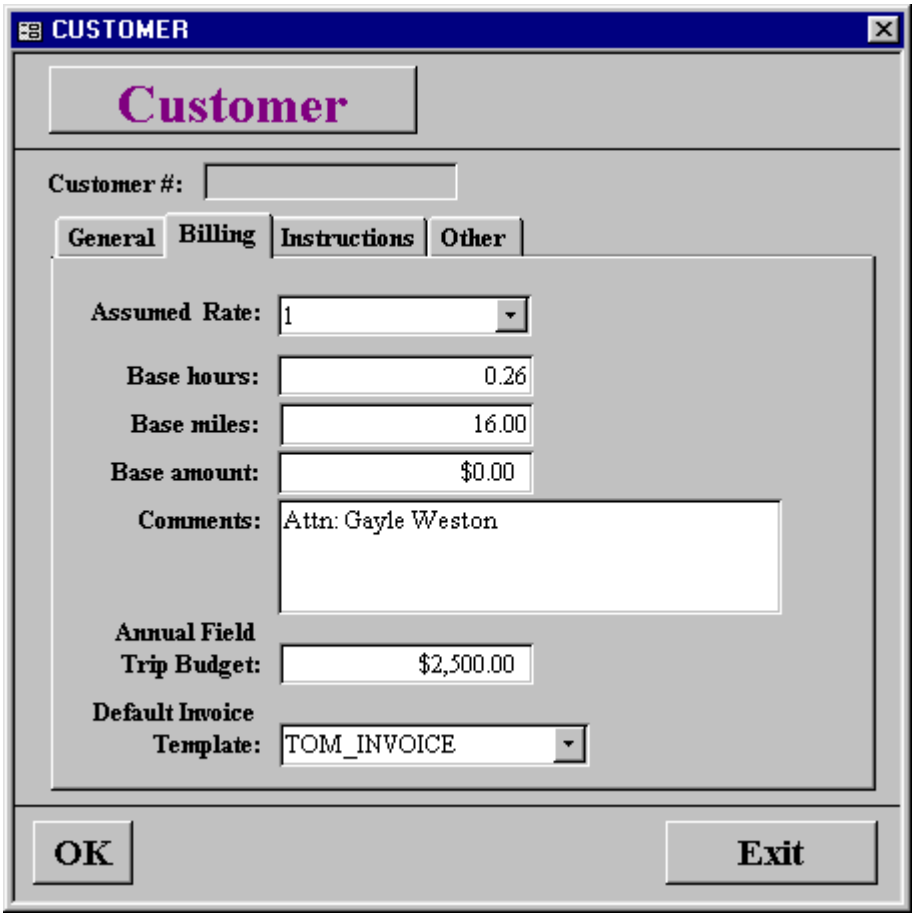


Figure 5-4. The Billing Tab on the Customer Data Entry Screen

Assumed Billing Rate: As was discussed previously in this section this is the field trip billing rate that T.O.M. will use by default when you enter a field trip for this customer. The button with the arrow pointing down to the right of this field indicates that this field is a drop down list field. That is if you click this button you are given the valid choices available for this field. When you click this button you are shown all of the billing rates that you have entered into T.O.M. This billing rate is used by T.O.M. to determine how much to bill the customer for the actual miles and hours logged by all drivers for field trips performed for this customer. For more information about billing rates see *Billing Rates* in *Chapter 3 - Entering Lookup Lists* in this manual. For more information about how T.O.M. bills field trips see *Chapter 5 - Entering Driver Field Trip Miles and Hours and Billing Field Trips* in the *T.O.M. User Guide*.

Base Hours: You may use this field as a short cut to entering driver time for field trips into T.O.M. Many school district have the drivers log their hours from school back to school. Those districts will then afterwards add a certain amount of time and miles to the driver time and miles to come up with the actual time of the field trip. If you enter an amount of time in this field T.O.M. will automatically add that amount of time to the driver's actual time that you enter in the Trip Driver Information screen. T.O.M. will also add this time into the estimated driver time when printing a field trip estimate or management reports. For more information about entering driver time and billing see *Chapter 5 - Entering Driver Field Trip Miles and Hours and Billing Field Trips* in the *T.O.M. User Guide*. Enter in as a whole number for hours and a fraction for fraction of hours. (Example, .5 = ½ an hour)

Base Miles: You may use this field as a short cut to entering driver miles for field trips into T.O.M. Many school district have the drivers log their miles from school back to school. Those districts will then afterwards add a certain amount of time and miles to the driver time and miles to come up with the actual time of the field trip. If you enter an amount of miles in this field T.O.M. will automatically add that amount of miles to the driver's actual miles that you enter in the Trip Driver Information screen. T.O.M. will also add this time into the estimated trip miles when printing a field trip estimate or management reports. For more information about entering driver time and billing see *Chapter 5 - Entering Driver Field Trip Miles and Hours and Billing Field Trips* in the *T.O.M. User Guide*. Enter as whole number or miles and fraction for fraction of miles. (Example 10.5 = 10 and ½ miles)

Base Amount: If there is a certain base dollar amount that is charged to a customer on top of all other charges when a customer is billed for field trips you can enter that dollar amount to this field. This amount will be added to the amount calculated for EACH DRIVER that performed a field trip for this customer. T.O.M. also uses this amount when calculating a field trip estimate as well as in management reports when the field trip has not been billed.

Comments: This is a short statement that allows you to enter any billing comments to be used when printing invoices to the customer. It is 50 characters long. This billing comment will appear on any field trip invoice that T.O.M. produces for the customer. It can be used for specific billing instructions that your customer may require. For example, Attn.: Kate. **NOTE**: This will only print on the customer's invoice if you have instructed T.O.M. to include this comment on the invoice in the invoice format that you selected for the field trip.

Annual Field Trip Budget: This is the field that is typically used to enter the dollar amount that a school was budgeted for field trip expense for a year. It is very useful within districts that use a Site Based Management approach to field trip budget management. This field is used by T.O.M. when producing the Field Trip Budget Report. T.O.M. will automatically calculate the amount of actual and estimated field trip expense to subtract from this budget amount based on a date range that you enter, on the fund that the field trip was charged against and on whether the field trip was billed or not. T.O.M. will allow you to specify that all field trips charged against a specific fund are not to be subtracted from this budget amount. For more information about how funds are used in determining whether field trips will be charged against this budget amount see *Funds* in *Chapter 3 - Entering Lookup Lists* of this manual. For more information about how the customer's remaining field trip budget is calculated, see *Detailed / Summary Field Trip Budget Report* in *Chapter 8 - Management Reports* in the *T.O.M. User Guide*.

Default Invoice Template: This field shows the invoice template to be used to print invoices. Click on the drop-down list to choose any of the available templates. See *Chapter 10 – Invoice Templates* in this manual for details about invoice templates.

The Instructions Tab on the Customer Data Entry Screen

Click on the Instructions tab on the Customer Data Entry screen (Figure 5-5), if it is not already displayed. This tab contains special instructions about the customer you commonly give your drivers when they perform field trips for this customer.

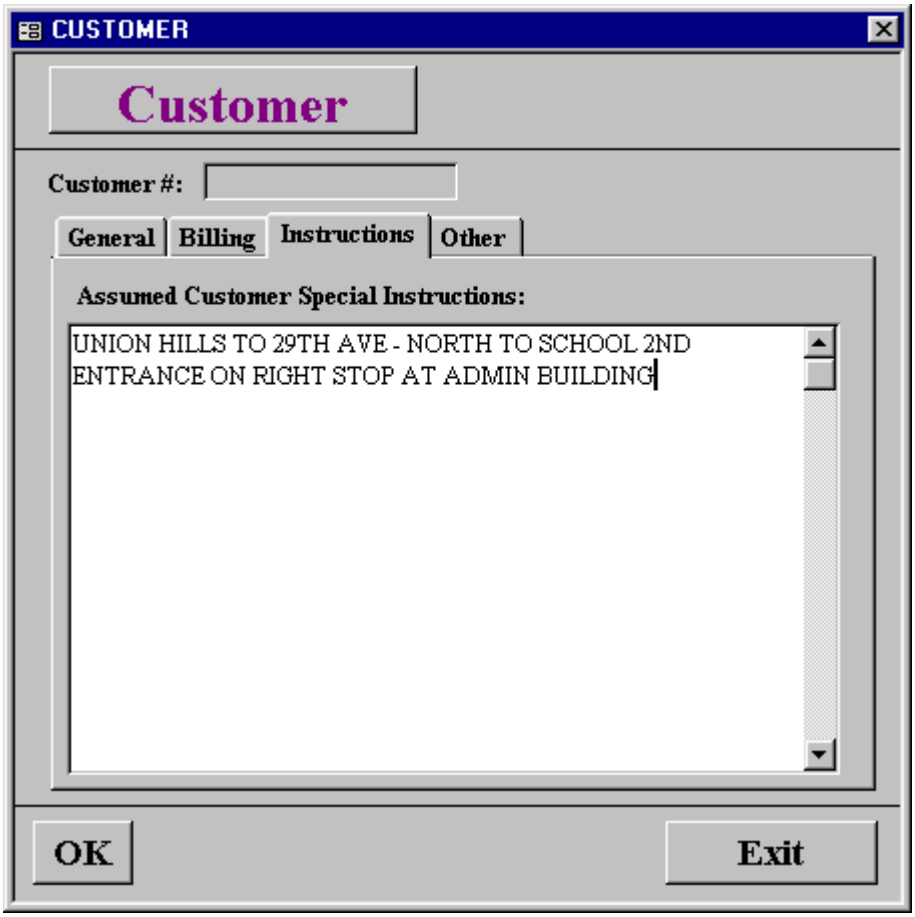


Figure 5-5. The Instructions Tab on the Customer Data Entry Screen

Assumed Customer Special Instructions: This field can be used to enter any special instructions that you commonly give your drivers when they perform field trips for this customer. You can enter an unlimited amount of information in this field. When you enter a field trip for this customer these special instructions are *stamped* on the field trip automatically by T.O.M. You may then override these special instructions with instructions specific to that unique field trip. If you change the customer special instructions in the field trip you will NOT change the customer's assumed special instructions. Conversely, if you change a customer's assumed special instructions you will NOT change the customer special instructions for all field trips that you have entered previously for this customer. The changed customer special instructions will take effect for all new field trips entered in the future for this customer.

The Other Tab on the Customer Data Entry Screen

Click on the Other tab on the Customer Data Entry screen (Figure 5.6), if it is not already displayed. This tab contains other types of information about the customer.

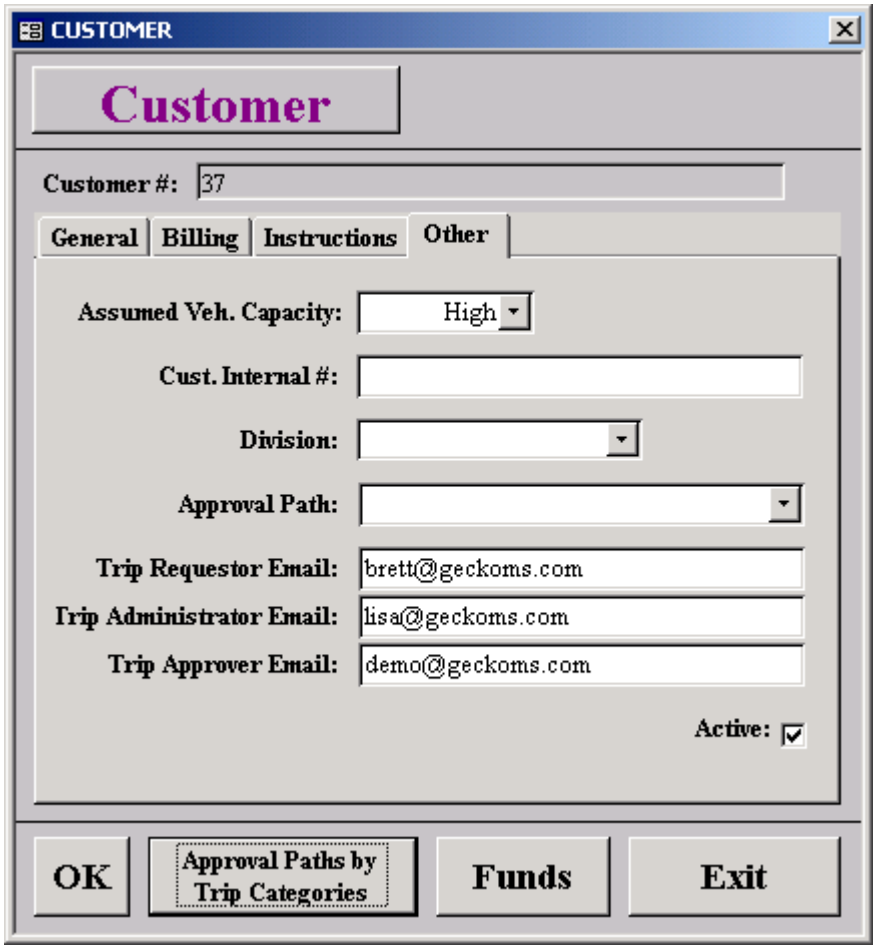


Figure 5.6 The Other Tab on the Customer Data Entry Screen

Assumed Vehicle Capacity: As was mentioned previously in this section this is the field trip vehicle capacity that is assumed when you enter a field trip for this customer. The button with the arrow pointing down to the right of this field indicates that this field is a drop down list field. That is, if you click this button you are given the valid choices available for this field. For this field you are given the three choices of; High, Medium and Low. This vehicle capacity is used by T.O.M. in calculating the number of vehicles is required to satisfactorily perform the field trip. For more information about how T.O.M. uses the vehicle capacity to calculate the number of vehicles required for a field trip see *How T.O.M. Automatically Calculates the Number of Vehicles Needed for a Field Trip* in *Chapter 1 - Entering Field Trips and Printing Estimates* in the *T.O.M. User Guide*.

Customer Internal #: This is an alphanumeric field. When you create customers, T.O.M. automatically assigns a customer number. If you have your own internal customer number you need to keep track of, this field can be used for that reason.

Division: You may group your customers into divisions. You create the divisions. There is no limit to the number of divisions that you may create. You may then assign a customer to one of these divisions. A good use of this feature is to create a division for you various bus garages if you have more than one. Then assign each of your schools to the division (bus garage) that services that school. You may then search your field trips by division. You may also create management reports by division. To view the list of divisions you've created just click on the down arrow to the right of the Division field and a list of your divisions will appear in a *drop down list* you may then find the correct division and click on it. T.O.M. will automatically place the selected division in the customer's division field. This field is optional. You do have to assign the customer to a division.

Approval Path: This is the default approval path that all field trip requests for this customer entered by WebTrips. WebTrip assigns new Trip Requests this approval path if the customer does not have any approval paths for a specific Trip Category. This field is by WebTrips ONLY. For more information about this see your WebTrip's User's Guide.

Trip Requestor Email: This is one of the three default Email addresses that T.O.M. allows you to set for a customer. This Email address will then *stamp* on any new field trip or field trip requested entered into T.O.M. This email address will *stamp* in the Trip Requestor Email address field in either the Field Trip Request screen or the Field Trip screen. This Email address is used by T.O.M. to automatically send emails to people when key events to a field occur. For information about this feature see Appendix H – Having T.O.M. Automatically Send Emails During Key Events in your Users Guide.

Trip Approver Email: This is one of the three default Email addresses that T.O.M. allows you to set for a customer. This Email address will then *stamp* on any new field trip or field trip requested entered into T.O.M. This email address will *stamp* in the Trip Approver Email address field in either the Field Trip Request screen or the Field Trip screen. This Email address is used by T.O.M. to automatically send emails to people when key events to a field occur. For information about this feature see Appendix H – Having T.O.M. Automatically Send Emails During Key Events in your Users Guide.

Trip Administrator Email: This is one of the three default Email addresses that T.O.M. allows you to set for a customer. This Email address will then *stamp* on any new field trip or field trip requested entered into T.O.M. This email address will *stamp* in the Trip Administrator Email address field in either the Field Trip Request screen or the Field Trip screen. This Email address is used by T.O.M. to automatically send emails to people when key events to a field occur. For information about this feature see Appendix H – Having T.O.M. Automatically Send Emails During Key Events in your Users Guide.

Active: This checkbox is used to signify if this is an active customer or not. If this box is checked then the customer is considered active. If this box is not checked then the customer is considered inactive. In the Customer Directory Report T.O.M. allows you to specify whether you wish to list active, inactive or all customers on the report.

Setting Approval Paths by Customer / Trip Category

The WebTrips extension to T.O.M. allows you to setup approval paths by not only customer but also by a combination of the type of trip and customer. For example, a field trip for boys basketball for a school would perhaps go to an athletic trip type of approval where as trip to the zoo for that same school may go to a different approval path. T.O.M. allows you to define when a combination of a customer and trip category will automatically be assigned to a specific approval path. When you click on the Approval Paths by Trip Category button on the Customer Screen (Figure 5-3) the Customer / Trip Categories Screen displays (Figure 5. 7). This screen allows you to setup combinations of Customer and Trip Categories and what approval path will service those combinations. You can read more about this feature in your WebTrips User's Guide. This feature is used by WebTrips ONLY.

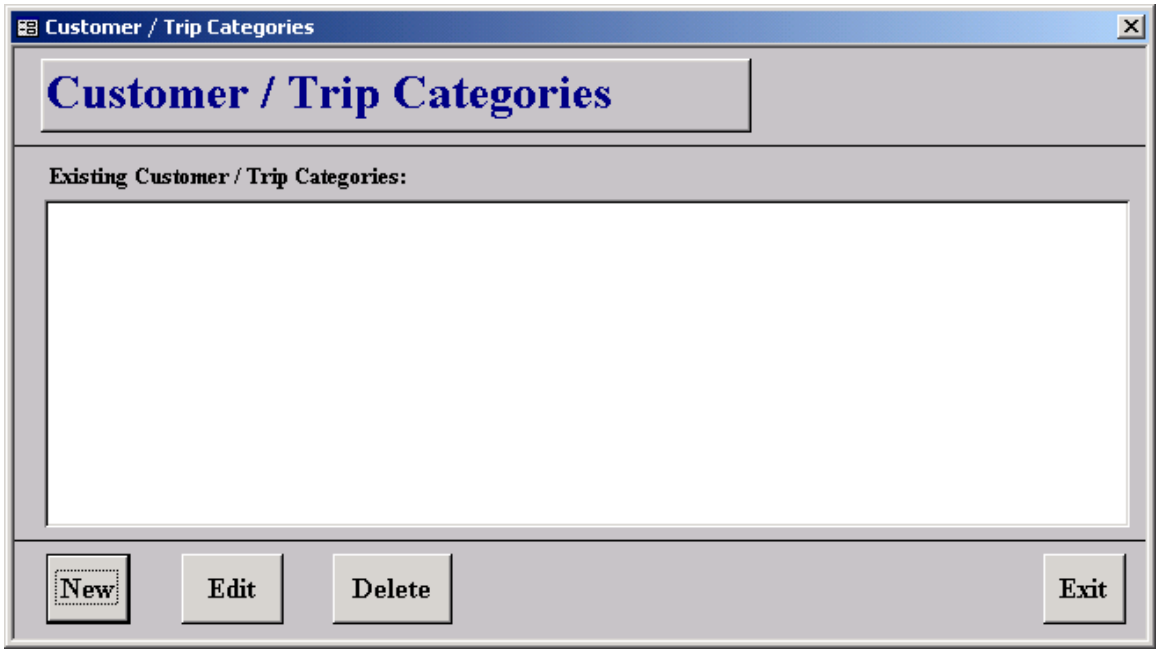
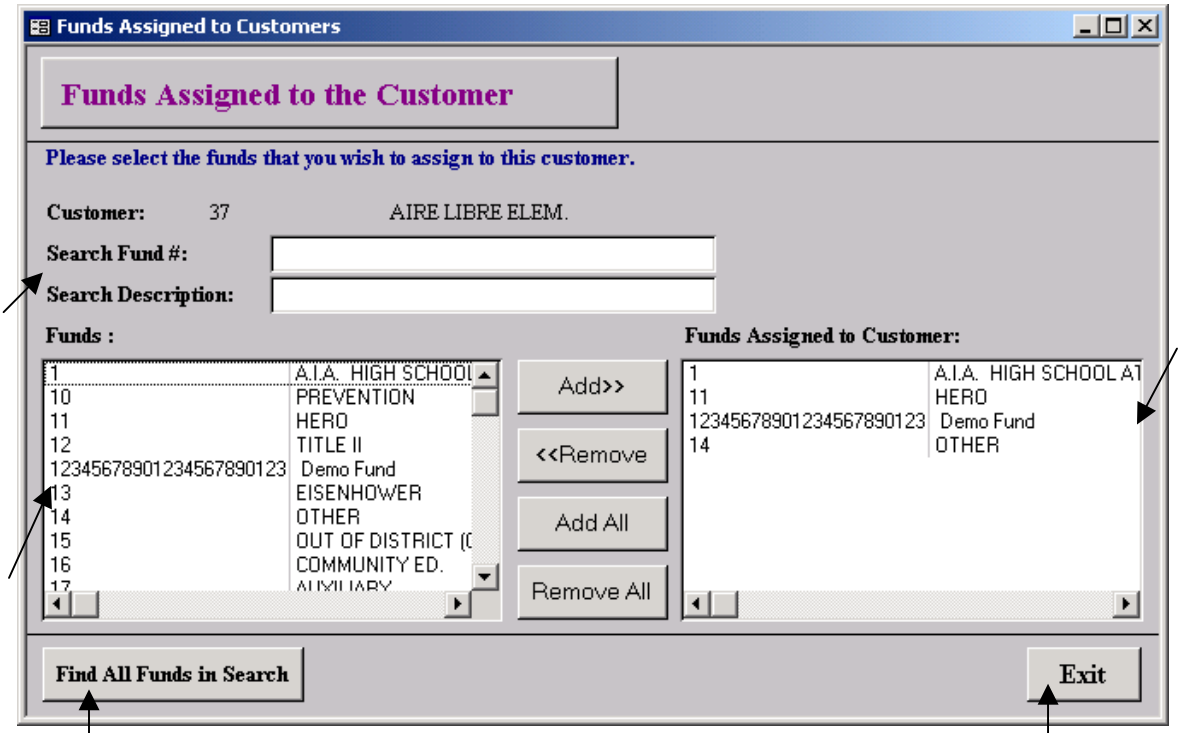


Figure 5. 7 – The Customer / Trip Categories Screen

Restricting the Funds that A Customer Can Charge A Field Trip To

T.O.M. allows you to limit the list of funds that a customer can charge a field trip to. Normally, T.O.M. will allow you or your customers to select from all the funds in the fund list that you enter in T.O.M. However, many organizations desire to limit the list of funds that a customer can charge their trips against. T.O.M. allows this. To do this you must specify to T.O.M. which funds a customer is authorized to charge a field trip against. To do this you would click on the Funds button in the Customer Screen (Figure 5-1). When you do this the Funds Assigned to Customer Screen displays (Figure 5. 8).



Funds Search options.

Funds found in the Fund search.

All funds assigned to the customer.

Figure 5. 8 – The Funds Assigned to the Customer Screen

The Search Funds button that will search for funds that match the search options when clicked.

Will return you to the Customer screen when clicked.

Search Fund #: This is used by T.O.M. to search for all funds that have a number that matches the one entered here. You may also enter a partial number to search by. For example, you could enter a Search Fund Number of 1 and T.O.M. will return all funds that have number's that start with 1.

Search Description: This is used by T.O.M. to search for all funds that have a fund description that matches the one entered here. You may also enter a partial number to search by. For example, you could enter a Search Description of 'Elm' and T.O.M. will return all funds with a description that begin with 'Elm'.

Funds: A list of all funds found by T.O.M. in the fund search matching the search fund # and search fund description. This list is rebuilt whenever the Find All Funds In Search button is clicked.

Add>>: This button when clicked will assign the fund that is selected in the Funds List to the list of funds the customer is allowed to charge trips against.

<<Remove: This button when clicked will remove the fund selected in the Funds Assigned to Customer List from the list of funds the customer is allowed to charge trips against.

Add All: This button when clicked will add all funds found in the fund search list to the list of funds assigned to the customer.

Remove All: This button when clicked will remove all funds from the list of funds that are assigned to the customer.

Funds Assigned to Customer: This is the list of funds that the customer may charge a field trip against.

Find All Funds in Search: This button when clicked will find all funds that match the search fund number and / or the search fund description and place them in the Funds list.

Exit: This button when clicked will close the Funds Assigned to the Customer Screen (Figure 5. 8) and return you to the Customer screen (Figure 5-3).