Customer

03 Customer Detail or Customer Edit or Customer Account Page

The **Customer Detail or Customer Edit or Customer Account Page** is where you will find all details and information of a specific customer. This page is found at .../administrator/customer_edit.php followed by the customer ID number.

In the **Customer Detail or Customer Edit or Customer Account Page** you will find many parts. Based on your user account permissions you many not have access to all menu options, buttons, fields or tabs. If you require permission to one of these and do not have permission you need to contact your team supervisor for approval.

The **Customer Detail or Customer Edit or Customer Account Page** menu items, buttons, fields and tabs are:

1. The Main ERM Menu bar. For information, the on ERM's main menu click here.

2. The **top row** of the Customer Details Page displays all specific details of the customer from:
    1. The customer account ID number (displayed after the #)
    2. Customer full name
    3. company account they are associated with
    4. Role / Position the customer has
    5. Customer Status (if they are active or inactive - click here for more information)
    6. Referred By (this informs you as to who recommended the customer to the company)
    7. Work and personal email accounts of the customer.
    8. Important Customer Details and Notes (click here for more functions available on this).
    9. Telephone Numbers specific to the Customer Contact and the Company (click here for more functions available on this).
    10. Company and Billing Address.
    11. Company Type (this is the industry the company is part of)
    12. Company Status (if the company is active or inactive - click here for more information)
    13. Region / Zone (displays the shipping/travel location code of the company/customer - click here for more information)
    14. Company Acc Name (if applicable)
    15. The company Account Email address.
    16. Important Company Notes (click here for more functions available on this).

3. When you are in the Customer Customer Information Section, known as the **Customer Details page** or **Customer Account Details Page**, you are given an additional Quick Toolbar menu item that has the most frequent used functions.
    1. The **Quick Toolbar** main menu contains specific functions that are only available when you are on the Customer Details Account Page. The additional menus and functions here are:

        1. The **Schedule an Activity for a Customer** menu = allows you to schedule an activity for a customer. An Activity/Task is something you have to do for a customer regardless of what that is. It could to call them; followup on an order, send a program, send an email, send an SMS, visit them, make a document. It is basically any work/task you have to do for a customer at any given date or time. Everything you do for a customer needs to have an activity if it is not going to be done immediately or a a New History of what

you have done. Click here for more information.

2. The **Activity Series** menu = allows you to set and schedule a series of automated activities specific to a work/task. For example if the customer cancels or complains. The series and sequence of activities is pre-set and created by a Supervisor. Click here for more information.

3. The **New Opportunity** menu = allows you to create a new opportunity for the specific customer. Click here for more information.

4. The **Attach Email** menu = allows you to attach an email received by a customer and apply it to the customer's account history. This is used if the email cannot be attached normally from your Dashboard inboxes. Click here for more information.

5. The **Print Info** menu = allows you to print the customer account details pages with the option to include, orders and history. Click here for more information.

6. The **Delete Customer** menu = allows you to make the customer account inactive. No customer account is deleted ever. Accounts are only inactive and hidden. Click here for more information.

7. The **Merge Duplicate Acc** menu = allows you to merge duplicate customer accounts together as one account. Click here for more information.

4. When you are in the Customer Customer Information Section, known as the **Customer Details page** or **Customer Account Details Page**, there are specific action buttons that can be used .
   1. The **Save Changes** button will save any changes made on the **Edit Customer detail TAB** in the customer details page. It does not save new history notes, emails, orders or other TABs. Saving changes to these tabs has to occur from the specific area. For example to save a History note you have to use the New History button. To save changes to an opportunity has to be saved from the Opportunity page.

   2. The **Cancel** button will cancel any changes made on the **Edit Customer detail TAB** in the customer details page. you to schedule an activity for a customer. It does not cancel changes to new history notes, emails, orders or other TABs. Cancelling changes to these tabs has to occur from the specific area. For example to cancel a History note you have to be using the New History button. To cancel changes to an opportunity it has to be from the Opportunity page.

   3. The **Get Region/Zone** button requests that the system recalculate the region/zone location of the customer. This can be used when there is not region/zone showing for the customer's billing address or you are not sure of the correct region/zone. Click here for more information.

   4. The **New Order** button is used to start a new purchase/booking/order for the customer account. This is the way to make a purchase/booking/order for a customer.

Using this button here will populate most of the required fields into the new purchase/order/booking page. Click here for more information.

5. The **Add New Customer to Company** button is used to add a new customer contact to the same company as the searched/accessed customer account that is being displayed. This is best used when you have opened or are viewing a customer's account and you need to add an additional contact or customer who is also part of the same company as the customer account you are viewing. Using this button will auto-fill the same company details when adding a new customer/contact to the same company. Click here for more information.

6. The **New History** button is used when you are making a new note about a call received, an email received/sent. This is used often when there is no other activity the customer has to clear or the activities that the customer has are not related to the new enquiry or task or call made or done with or on the customer account. Click here for more information.

7. The **SMS Broadcast** button is used to send the customer or contact a TEXT/SMS message to their mobile phone number (if the number is available). This can be used to also send a TEXT/SMS to Iconic Workers. There are generic templates that can be used to avoid typing the same thing multiple times or you can type your own message. It is recommended to keep the message short and to 1 message block before sending. This character count is displayed. If it is not, click in the text box press the spacebar and this will reset the character count. The message sent will display to the customer/contact with the company name IconicShows - it cannot be replied to. Click here for more information.

8. The **Slack Broadcast** button is used to send an Iconic Worker a Slack Broadcast message either on a permitted channel or as a direct message. There are generic templates that can be used to avoid typing the same thing multiple times or you can type your own message. Click here for more information.

5. Under the **top row** of the Customer Information Section, it provides TABS with additional information specific to the customer and company.
    1. **Customer Specific Information** TABS are:
        1. The **tab** **Edit Cust Detail (#000000)** contains all the customer details fields. This is where if a change to customer details and account is required to be edited will be made. Most of the fields are self-explanatory.
            1. **Customer Detail Fields**
                1. Contact First Name and Last name
                2. Role / Positions
                3. Customer Status (if they are active or inactive - click here for more information)
                4. Referred By (this informs you as to who recommended the customer to the company)
                5. Contact Phone #'s
                6. Company Phone #'s
                7. Mobile

8. Wk Phone
9. Fax
10. Home/Aft Hr
11. Work Email of the customer
12. Personal Email of the company

2. **Company Details Fields**
    1. Existing Company or New Company or Individual Sale - NO Company.
        1. this informs you of whether the customer is with an existing company, new company or is an individual sale and not part of the company.
    2. Company Name
    3. Company and Billing Address which includes the
        1. Country, State, Suburb / Town and Postcode
        2. Street Address Line 1 and the street Address Line 2 (if applicable)
    4. Company Type (this is the industry the company is part of)
    5. Company Status (if they are active or inactive - click here for more information)
    6. Region / Zone (displays the shipping/travel location code of the company/customer - click here for more information)
    7. Company Contact Name who handles their Account
    8. Company Account Email
    9. The company Web Site
    10. Yr Num (display the number of persons in the company during the year - this is no longer used)
    11. Total Num (display the number of persons in the company overall - this is no longer used)

3. **Important Notes Section**
    1. Best Times To Call / Important Cust Notes
    2. Important Company Notes

4. **System Messages**
    1. Last History Recorded by (displays who was the last Iconic worker who created a history on the customer account)
    2. Account Created Date (displays the date customer account was created)
    3. Account Created By (displays the Iconic worker who created the customer account)
    4. Latest Email Sent (displays last date an email was sent to the customer)
    5. Last Call Attempt / Reach (displays last time the customer was called)
    6. Last Product Purchase (displays the last product the customer purchased)
    7. Total Cust vs CMP Purchases to-date (displays the number of purchases the customer made and the number of purchases that others from the company have made)
    8. Account Edited on (displays the last date an Iconic worker edited details of the customer account)
    9. Account Edited By (displays who the last Iconic worker was who edited the details of the customer account)

2. The **tab** **Activities** contains all the customer activities or tasks that staff have to do for the customer account. This is where you would clear an activity or edit a scheduled activity For more information on the Activities click here. Most of the fields are self-explanatory.

3. The **tab** **Opportunities** contains all the customer opportunities that staff have made or about to make with customer. This is where you would make a new opportunity for a customer. For more information on Opportunities click here. Most of the fields are self-explanatory.

4. The **tab** **Orders** contains all the customer current and past purchases, booking and orders. For more information on Order click here. Most of the fields are self-explanatory.

5. The **tab** **History** contains all the customer history notes, emails and cleared activities. Everything that happens with a customer account is recorded and logged here. For more information on the customer History click here. Most of the fields are self-explanatory.

6. The **tab** **Groups** contains all the groups the customer account is part of. Groups are used to add customers to specific things. For example a group could be VIP Customers or a specific State or Country or Regular Customers. There are many possible groups that are created and if a customer is part of the group it would be displayed here. For more information on Group click here. Most of the fields are self-explanatory.

7. The **tab** **Address Book** contains all specific location addresses the customer has. This could be because the customer has multiple venue locations or works at different locations or manages different locations. For more information on Address click here. Most of the fields are self-explanatory.

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2. **Company Specific Information** TABS are:
    1. The **tab** **All Company Contacts** contains all contacts that work or have worked with the specific company of that specific customer account. Most of the fields are self-explanatory.

    2. The **tab** **All CMP Opportunities** contains all the company opportunities that staff have made or about to make with contacts who are associated with that company. For more information on Opportunities click here. Most of the fields are self-explanatory.

    3. The **tab** **All CMP Orders** contains all the company's current and past purchases, booking and orders made by contacts associated with the

company. For more information on Orders click here. Most of the fields are self-explanatory.

4. The **tab** All CMP Activities contains all the company's activities that have scheduled by Iconic workers for contacts associated with the company. For more information on Activities click here. Most of the fields are self-explanatory.

5. The **tab** All Company History contains all the company's history notes, emails and cleared activities. Everything that happens with a company and their associated contact's and an account is recorded and logged here. For more information on the History click here. Most of the fields are self-explanatory.

3. **Travel / Location / Event Management Information** TABS are:
    1. The **tab** Google Directions allows you to obtain directions to the Company Billing Address. Most of the fields are self-explanatory.
        1. ***Important Note:*** This does not provide you with directions to an Event/Venue Travel Location. You can use this for that functionality, but you will need to change the address details to the Event/Venue Travel Location Address. Most of the fields are self-explanatory.

    2. The **tab** Google Maps allows you to view the surrounding area of the Company's Billing Address. Most of the fields are self-explanatory.
        1. ***Important Note:*** This does not provide you with directions to an Event/Venue Travel Location. You can use this for that functionality, but you will need to add the required address details to the Event/Venue Travel Location Address or event management property/item.
4. **Search and Sorting Functions available in most of the TABS**
    1. You can search for specific activities by using the search input text box found on the right hand side.

    2. To display more than the first 10 items of activities, if there is more than 10, you can use the selection drop-menu.

    3. Columns are sortable by clicking on the column name.

Important Customer Details and Notes also known as (Best time to Call / Important Customer Notes)

1. The **Best time to Call / Important Customer Notes** provides additional information about the customer or the best times to call. To view the Customer Notes click on the link Best time to Call / Important Customer Notes that is displayed. When pressed you will have to options

    1. The button **Edit** if pressed allows you to edit the important notes of the customer.
    2. The button **Stay** if pressed allows you to keep the little bubble window on hold. To

release the hold press the button **Unfreeze**.

Telephone Numbers specific to the Customer Contact and the Company

1. You can copy and paste a specific customer or company telephone number. To do this, using your mouse hover the specific number and press your left mouse button. The number will be copied for you to paste in the Phone System or anywhere else as required. You will be prompted by a system message once the number has been copied.

Important Company Notes

1. The **Important Company Notes** provides additional information about the company. To view the Company Notes click on the link Important Company Notes that is displayed. When pressed you will have to options
    1. The button **Edit** if pressed allows you to edit the important notes of the customer.
    2. The button **Stay** if pressed allows you to keep the little bubble window on hold. To release the hold press the button **Unfreeze**.

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