



Limousine Management Systems

Your Partner In Transportation Technology



How to Set Up a Customer File

SUMMARY

The customer information is entered one time and can be recalled at anytime thereafter to add, delete or update the profile. Additional information can be stored such as: Cell Phone Numbers, Credit Card Information, Bill To, Account Code, Standard Rate, Billing Structure, Terms, Grace Period, Cross Streets, Map Pages, Salesperson, Account Type and more.

- ❖ Account numbers are assigned automatically and a customer file may be recalled by their account number or by the first few letters of their last name.
- ❖ The date is recorded when a customer file is created and last updated.
- ❖ Fields are available to record additional information such as beverage preferences and chauffeur requests.
- ❖ Internal notes and any other memory joggers can also be added to the customer's file.
- ❖ Account balances, the last invoice, last payment, and year-to-date sales are available for viewing in the customer's file.
- ❖ Numerous management reports are available and birthdays, anniversary, and referral source reports are available for advertising purposes.
- ❖ Mailing labels are also available by Customer Name, Bill To, Account Type, and Source Type.

When creating a reservation, once the customer's profile has been established, all the important information will automatically fill in on the reservation.

RECOMMENDATIONS FOR INITIAL SET UP

When initially setting up the customer files, it is recommended to set up the corporate accounts first. Once the corporate account has been set up an individual account number and a bill to number, which are the same, will be automatically assigned.

It is then recommended to set up the customer files for the customer/passengers who regularly travel under the corporate accounts that have been already set up. The customer/passenger will be assigned an account number and a bill to number. If the customer/passenger travels regularly under a company, the program will allow the user to enter the company's bill to number to be saved in the customer/passengers file. When the customer/passenger decides that they would like to travel and have it billed to them personally, the user can easily override the bill to of the

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company and enter the bill to for the individual (which is also their account number) on the reservation screen.

When making a reservation for a customer who is not in the database, a window will appear informing the user that a record for this customer does not exist and a record can be created via a customer quick form. This form is designed for a quick basic information entry and the file will need to be expanded on later. It is recommended that if the time is available, to create the customer file as part of taking the reservation.

HOW TO SET UP THE CUSTOMER FILE

1. On the upper menu or side icon toolbar click on **Tables** then click on **Customer**. A window will appear for adding, editing or deleting a customer file. The program comes with a customer file for Limousine Management Systems already set up. It is recommended to leave this file for reference information. If the user decides to delete the Limousine Management Systems file, **do not delete** this file until an additional customer file has been created.
2. Click on **Add**.
3. In the **Name** field the user can enter either the name of a company or the name of an individual. If the name of a company is entered, click on or tab to the **Attention** field to enter an individuals name for that company if desired.
4. If the customer file is for a company, type in the address for the company. If it is for an individual who regularly travels under a company, it is recommended to type in the **home** address of the individual. This information is vital for routing when the individual requires a pickup from home. If the individual requires a pickup from the office, this information is available for routing from the company's customer file.
5. Click on or tab to and enter the **Home, Work** and **Fax** numbers.
6. Fields are available for entering the **Map Page** and **Cross Street**
7. The **Account** number will show the word "New" until a new customer file is saved. At that time a number will be assigned.
8. The **Bill To** number will also show the word "New" until a new customer file is saved **or** a bill to is selected from the pull down window. When a new customer file is saved, the program automatically assigns an account number and a bill to number, which is the same. If an individual does most of their traveling under a company, it is suggested to select the company's bill to number from the pull down window to be saved with the file. When the individual would like to have a trip billed to them personally, the user can easily override the bill to of the company and enter the bill to for the individual (which is also their account number) on the reservation screen.
9. The **Name** field under **Bill To** will automatically fill with the name of the individual or company that represents that bill to number.
10. The **Account Type** and **Payment Type** can be selected from the pull down window.
11. Enter the **Credit Limit, Net Terms, Grace Period**.
12. If this customer has a different **Interest Rate** and **Days** (before interest will be charged) than the overall customer base, enter that amount here.
13. The **Rate 1** and **Rate 2** fields are memory jogger fields for inputting different rates for this customer.
14. Type in a percentage **Discount**, if a standard discount is to be given on all their invoices.
15. Select a **Salesperson** and **Agency** from the pull down window.
16. Fields are available for entering the type of **Anniversary** and **Date, Birthday** and **Date**.
17. Tab to or click on **Page 2**.
18. Select a **Source/Referral** from the pull down window.
19. **Department** allows the user to enter a department within the customer's company.

20. **Profit Center** is integrated with the Profit Center module. The Profit Center module is available for companies that have two divisions (e.g. Atlanta Buses and Atlanta Limousines). When creating a customer file, the user can specify what part of the company is responsible for the reservations and sales generated for this customer. Management reports are also available that utilize this information.
21. **Driver Request** and **Requested Vehicle Type** allows the user to save a requested driver or vehicle type. The driver's name and/or vehicle type will appear whenever a reservation is made for the customer. The user can override the selection while making a reservation.
22. **Order/PO/TA** is available for an order number or any other type of number that a company may request to appear on all the invoices.
23. **Gratuity** allows the user to input a gratuity percentage that is different than the amount set up in defaults.
24. **Surcharge** allows the user to enter an additional percentage charge such as a fuel surcharge.
25. **Phone Rate** allows the user to input a different phone rate than the amount set up in defaults.
26. If the customer would like the routing information to appear on the invoice, place a check in the **Routing** box by clicking on the box.
27. The user can specify a specific liability form to appear on the customer's trip sheet. Click on the **Liability** box to place a check in the box, then click on or tab to **Liability Form** to select which liability form. The program comes with a standard liability form, which can be edited or new ones can be created.
28. **Short Trip** allows the user to print the trip sheet in a shortened form for this customer. Click on the box to place a check in the box.
29. **Late Charge** statement will print at the bottom of this customer's invoices. Click on the box to enter a checkmark to print the late charge statement.
30. **Invoice Type** is a field that is available for a future module that is still under construction. At this time an "I" will appear in the box.
31. **Bill Cycle** allows the user to keep track of the billing cycle for this customer such as 15th, 30th or Daily.
32. **Group** allows the user to assign groups an individual code for an event. The Group field can be used when a coordinator or destination manager has several people traveling to an event they are coordinating. The invoices can be printed by groups, so that they can be easily disbursed for payment to the individual companies and/or departments that attended the event.
33. **Trip Notes** allows the user to include notes that will appear on the trip sheet such as this customer likes a newspaper. To leave this field, click on or tab to the next field.
34. **Card Holder, Number, Type, and Exp Date** allow the user to enter the credit card information for this customer. When a reservation is made for this customer, the credit card information will automatically appear on the reservation. The user can override this information while making the reservation. A prompt will appear on the screen if the credit card is due to expire within 30 days. The credit card information can be "Hidden" on the trip sheet by clicking **Systems** on the upper menu and then **Defaults**. By clicking on the **Hide Credit Card Info** box, the user can prevent the credit card information from printing on the trip sheet.
35. **Last Updated** will automatically track the date that the customer file was last updated.
36. **Account Opened** and **Account Opened By** allows the user to track the date the customer file was originally opened and the user who opened the account.
37. **Sales To Date, Balance Owed, Open Credit, Invoice, Payment** and **Date** are fields that **do not** automatically update. The memory required to automatically update these fields on a continuous basis in the entire customer base would slow the program down

considerably. When the user would like to view the most current information for these fields, there are two simple updating processes that can be followed.

A. To Update One Account

1. Click on **Customer**, then click on **Utility**, and click on **Update Totals**
2. Type in the name of the customer in **Starting Account Name** and **Ending Account Name**.
3. Click on **Proceed**.

B. To Update All Customer Totals

1. Click on **Customer**, then click on **Utility**, and click on **Update Totals**.
2. Type in **A** (or a number) in the **Starting Account Name** field to bring up the first customer file on the pull down window. Click on the first customer file.
3. Type in **Z** (or the letter for the last set of accounts such as **X**) in the **Ending Account Name** to bring up the last set of customer files in the pull down window. Click on the last customer file.
4. Click on **Proceed**

38. Tab to or click on **Page 3**.

39. Fields are available to enter the **E-mail**, **Cell Phone** and **Pager**.

40. **Reminder Note** allows the user to enter notes that will appear in red on the bottom of the reservation screen, such as "Fax Trip Sheet for Signature ASAP".

41. Click on **Save** and then click on **Close**.

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