

This document describes how to work with the addresses from Local Customers and Foreign Customers.

This option can be found at: Files > Local customers

1. Introduction

In the screen 'Local customers' you can add, edit and delete customers. You can also import your addresses from outlook or an .csv file (comma separated value). All addresses and customers can be divided in to groups which makes it easier to find your customers.

2. Startscreen Local customers, Foreign Customers, Carriers etc.,

Type:	Select the type of the address. Types are local customer, foreign customer, agents and carriers.
Close:	Close the window.
Add:	Add a new address.
Edit:	Edit the select address.
Delete:	Delete the selected address. This button is only active for supervisors.
Print:	Print the data from the selected customer.
Cancel:	Cancel the current action.
Help:	Opens the help file.
Import*:	Use this button to import an address from Outlook 97,98 or 2000 or to import a complete CSV file.
Search:	Fill in the alfasearch or a part of the alfasearch of the required address. This search option can be quickly accessed by pressing F7.

* Outlook Import: this function may not work, because of the various Outlook versions available.

Addresses which are locked in the customers screen are displayed in red. Locked Addresses can not be used.

3. Adding and editing Local Customers

To begin we first add a new customer. Click on ADD. A screen will pop up and a ID and security number is automatically generated.

Tab sheet 'General'...

Alfasearch:

Enter a three digit (alphabetical) code for this customer (*example: Cargo Data Systems= CDS*). (*It is possible to use more then three characters*)

Name:

Fill in the name of the company from this customer.

Visit Address:

Fill in the address details like street name, house number.

City: (*fill in the zip code and city*)

(*Sprinter 2000 contains a large database of zip codes. Therefore you only have to enter the complete zip code. Then the city and country will automatically will be filled by Sprinter 2000*).

Fill in the name of the city where this customer is located.
(*example: NL-4702VZ or B-2920*).

Country:

Select the country from the dropdown menu.

Zip code: (*only used for reports!!!*)

Fill in the zip code of this customer.

Contact:

Fill in the name of the contact person.

Phone:

Fill in the telephone number of the customer. (if you press on 'Call', Sprinter will attempt to make a skype out call. This only works when you have 'skype call out').

Skype:

If the customer uses skype to call their customers and relations you can fill in the skype name in this box. (if you press on the button 'Skype', Sprinter will attempt to make a skype call to this person. You must have skype installed on your computer).

Fax:

Fill in the fax number of this customer.

Email:

Fill in the general email address of this customer.

Local Customers
Version: 1.1
Date: 20-07-2006

Pre Alert Email:

Fill in the email address where the documents (e.g. manifest, cmr etc) should be send to. If empty it takes the email address fill in the box Email. If you have more then one email please separate them with a semicolon ;

EDI Email: *(only applicable if you have the EDI Module).*

Fill in the email address of the receiver of the EDI messages distend for this customer, carrier or agent.

Website:

If this customer has a website you can fill in the url here
(example: <http://www.cds-nl.com>).

VAT Number:

Fill in the VAT Number of this customer.

Mail Address:

If this customer has a different address to receive their mail then is should be filled in here.
(The Copy button can be used to copy the main address to the mail address if these are the same).

Pickup/Delivery:

If this customer has a different pickup or delivery address it should be filled in here.
(The Copy button can be used to copy the main address to the pickup/delivery address if these are the same).

Selection Code:

A code to filter or specify this customer when you make reports.

Sales Rep:

The code of the sales representative of this customer.

Del/Pickup Zone:

A number representing the zone of the customer. The zone is used to calculate the delivery or pickup charges.

LOCK:

If this customer is out off business or has taken his business to someone else you can lock this customer. This way you still keep the information but Sprinter will mention that this customer is locked if this customer is being used. *(this can only be set by Supervisors or Administrators).*

Tab sheet 'Contacts'

In this screen you can add, edit or delete the contacts for this customer.
Press on the button 'Add Contact' to add a contact.

Fill in the name, phone number, skype name, fax number, mobile phone number and email address of this contact and mention his/her function and date of birth (optional).

Tick the checkboxes 'Receiver of invoice' and/or 'Receiver of Statement' if this contact person must be printed on the invoice and/or statement. You can only tick these checkboxes for one contact person per selected address (customer). If you tick these checkboxes for more than one contact person the system will always take the first person he can find with the option ticked.

Drag a photo on this window to store it with this contact person.

If you have photographs of the contact persons from this customer you can drag them to this window to store it with the contact details.

If you click on the tab sheet 'Notes' you can leave some specific details about this contact in this screen.

Tab sheet 'Financial'

Bank name:

Fill in the name of the bank from the customer.

Bank account:

Fill in the account number from the customer.

IBAN:

Fill in the IBAN number from this customer.

BIC:

Fill in the BIC number from this customer.

C.O.C. Number:

Fill in The registration number at the Chamber of Commerce from this customer.

E.A.V.:

EAV can be used as an insurance of administration fee.

Advance of Funds %:

A percentage used to calculate the advance of funds. Advance of funds is calculated over the total invoice excluding VAT. If needed, more expenses can be added or deleted. Click on the button next to the field. These settings are only applicable for this customer. If you like this setting to be the same for all customers you can set this here: System > Company Information

Credit Limitation %:

A percentage used to calculate the credit limitation. Credit limitation is calculated over the total invoice excluding VAT.

Credit Limit:

Fill in the credit limit amount of this customer.

External Account Nr:

The external account number from the accounting software used by this customer

Fiscal Number:

Fill in the fiscal number from the customer.

Bulk Invoice:

If this option is ticked, Sprinter 2000 is able to make bulk invoices instead of single invoices for this customer.

Print invoice when POD is entered:

Tick this option if you want invoices for this customer to be printed after the POD information is filled in. As long as the POD information for the shipment is not filled in the invoice will not be printed. You can create a report (Subadministration->Report->Invoices to Print) with all invoices not printed.

Send invoice by email: (Only for electronic Invoices Module users!).
If this option is ticked, Sprinter 2000 will send the invoice by email.

VAT on invoice:

If this option is ticked, the VAT is calculated over the total invoice and printed on the invoice. This can be enabled or disabled per customer.

Terms of Payment:

Enter the amount of day of which the invoices should be paid. In the drop down menu you can select the options 'After invoice date' or 'End of Month'.

Invoice Currency:

Select which currency should be printed on the invoice from the drop down menu.

Invoice Text:

Here you can enter additional information.

Document Language (e.g. Invoice):

Choose the language in which the document should be printed.

Fuel Add-On: (Only for Road Module)

1. Fuel Add-On %:

A percentage used to calculate the Fuel Add-On. The fuel add-on is calculated by default over the first three invoice lines. But can be changed by changing the values of FUELADDFLI, in the Options screen. The values should be separated by ; (semi-colon) (example: 1;4;5;6 – This way the add-on will be calculated over lines 1,4,5 and 6) (System->Options).

2. Fuel Base Price:

Fill in the base price of the fuel in the country of the customer.

Percentage per 4 cents [1]:

Lets say that the fuel price is 0,84cts, and this gets raised by 4 cents. If you fill in 1% in this field, the base price will be raised by 1% cents, every time the fuel is raised 4 cents.

Negative Fuel Add-On possible:

With this option ticked, it will be possible to enter a negative value in case the fuel price descends below the fuel base price.

(the current price needs to be edited manually every month. You can find this here: System > Options see: FPYYYY-MM (FP2006-08)).

Tab Sheet 'Various'

Address is Editable per Shipment:

This option is mostly used for customers that will only be used very rarely or once. The idea is to make a, for example, PRIVATE address with this option enabled. This way you can choose this address to enter a address manually with a shipment.

Counter:

The counter is used to generate a automatic reference number per customer. Fill in the number minus 1 where to start. If you fill in 0, then the next number generated is 1. The reference number is combined with the alfa search and this counter. The reference is placed in the box Foreign Agent Reference of the shipment and will be printed on the invoice (unless you have turned off this feature). When you leave the counter box empty then no reference number is generated.

Local Agent: (only Air)

This is the local agent you have to transfer the inbound (import) shipment to.

Opening Hours:

Enter the opening hours of this customer.

Example: Monday – Friday: 08:30 – 17:00

Extra Information:

These three lines will show up in a window every time you choose this address. Intended for important information about this customer.

Text on Transport Order/Confirmation:

Use this field to enter information like:

Always load with tailboard between 08:00 – 09:00
Lay-days: Monday, Thursday

This text will be printed on the transport order.