

Enterprise - Creating Customer Records & Customer Record Avatars

Last Modified on 08/02/2023 11:09 am CDT

What is a Customer Record?

The Customer section of Enterprise contains your prospect, current, and any past customers you have worked with. These records are filled with relevant sales, and contract related information as well as invoice options, etc.

Buy N Large (Primary)
123 Main St. ID: 4295013744
Cokato, MN 55321 Branch: Minneapolis
(123) 456-7890

! Lunch Today ! Pay update confirm
Currently viewing 2 of 310607 tasks. View more...

tasks appointments social email

visifile

- details
- defaults
- documents
- integrations
- invoice history
- invoice setup
- evaluations
- messages
- payment history
- tasks
- search

customer snapshot

Customer Name: Buy N Large Customer ID: 4295013744 Branch: Minneapolis Status: Active
Parent ID: Root ID: 4295013744 Notes: Don't call Jim on Fridays- usually at the cabin
Customer Tree: Account View

financials

Last Payment	6/26/2020	YTD Sales	\$0.00
Balance Due	\$41,724.69	Lifetime Sales	\$367,435.94
AR Balance	\$41,724.69	Sales Trailing	\$9,663.75
Credit Limit	\$500,000.00		

contacts

Name	Title	Email
Ben, Jerry	Account Receivable	
Burton, Hal	AP	HalBurton@xip.xom
Dale, Jones	Accounts Payable	jones@xip.xom
Daniels, Jack		jack@bnl.xom
Daniels, Jeff	Supervisor	jeff@bnl.xom
Disney, Walt	Owner	waltdisney@xip.xom

messages

Date	Action	Message	Rep	Contact
6/18/2020	Message	tried to call. lvm	bryce.poulton	
6/18/2020	Contact	blablkns'	bryce.poulton	
5/19/2020	Fall Off	I found out from the customer about half way through the s...	hosteval1	

employee

customer

order

This Article Covers:

1. Adding a Customer
2. Customer Avatar Area
3. Customer Actions Menu

Check out our TempWorks University Videos to get started with Enterprise: [Customer Part 1: The Basics](#)

Adding a Customer Record

When you have a new customer that has signed a contract, or a new prospective customer your sales team is working with, you'll want to create a customer record in your system to track conversations, create orders, and generate invoices.

Note When adding a customer, or any record in your system, be mindful of your current **hierarchy** level.

1. Navigate to the Customer option on your navigation tree and select the + option (or use the [keyboard shortcut Alt + 2](#))



2. A new window will open, enter the customer name as you want it to appear on the record

customer name		other billing	
Customer	Perry's Tool Shop	Phone	1234567890
Department	Primary	Email	
main address		sales information	
Attn. To		Account Manager	amelia.stout Amelia Stout
Street	123 Main St.	Branch	New Brighton
Street 2		Sales Team	1 Default
City	Saint Paul	Active Date	1/13/2020
State	MN	Terms	Net 15 Days From Date Of Invoice
Zip	55121-____	Note	
Country	United States of America		
Worker Comp	MN 8810		

3. *Optionally*, enter the following information:

- **Address:** This should be the main location address. Entering the address here populates on the details page and creates your first [worksites](#) for this customer. (we highly recommend adding an address). If you have [address standardization](#) turned on, you may be required to standardized the address entered before continuing.
- **Default Worker Comp:** If this is a prospect you are entering, don't worry too much about this option as it can be changed later in [defaults](#).
- **Phone/Email:** This would be a phone or email that is not for a specific person/contact like the general phone number for this business. Documenting this can be helpful for cold calls, etc.
- **Sales & Service Information:** Information such as Account Manager, Sales Team, etc. appear under the [sales & service](#) section of the customer record and can always be updated there.
- **Terms:** This is saved under the credit and payroll section on the customer record and determines when an invoice is overdue. Typically this is updated after the contract is signed and does not need to be

changed here.

- **Notes:** Anything entered here will appear on the notes visifile section. Notes here should always be applicable and important since they have no name or date/time stamp associated with them. For other notes and conversation information, we recommend [logging a message](#).

4. Select Save

By default, the customer record will be saved with a Prospect status.

The screenshot shows a customer record for "Tommy's Welders (Primary)". The header includes the company name, ID (4295014921), and branch (Eagan). A status dropdown menu is highlighted in red, showing "Prospect" as the selected option. The page is divided into sections: "customer snapshot" with fields for Customer Name, ID, Branch, Parent ID, Root ID, and Notes; "financials" with fields for Last Payment, Balance Due, AR Balance, Credit Limit, YTD Sales, Lifetime Sales, and Sales Trailing; and "contacts" which currently shows "No Records Found". A sidebar on the left lists navigation options like "details", "defaults", "documents", etc.

Note Wondering about the defaulted information?

- The Account Manager defaults to the service rep who is entering the record
- Branch is defaulted based on the service rep's current hierarchy
- Worker Comp is defaulted based on the option selected on the [branch setup](#)
- Sales Team defaults based on the [service representative](#) information in Administration

Avatar Area Information

The avatar area is located in the upper left corner when you open any customer record:

The screenshot shows the avatar area for "Buy N Large (Primary)". It includes a search bar at the top with the text "Search for Employees, Customers, Orders, etc.". Below the search bar, the company name "Buy N Large (Primary)" is displayed in large text. Underneath, the address "123 Main St. Cokato, MN 55321" and phone number "(123) 456-7890" are listed. To the right, the ID "4295013744" and branch "Minneapolis" are shown. The area is decorated with a stylized building icon and navigation icons at the bottom.

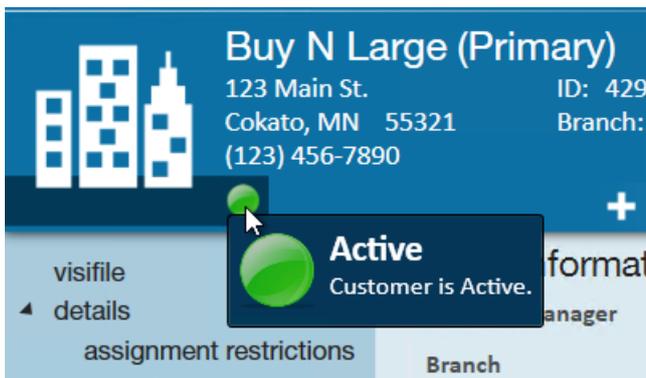
Information Displayed Includes:

- Customer Name (and [Department Name](#))
- Customer Contact Address (can be different from the billing address located under customer details)
- Customer Main Phone Number (located under details > contact methods)
- Record ID #
- Branch Associated with the Customer Record (located under details > [sales and service](#))

Avatar Icons

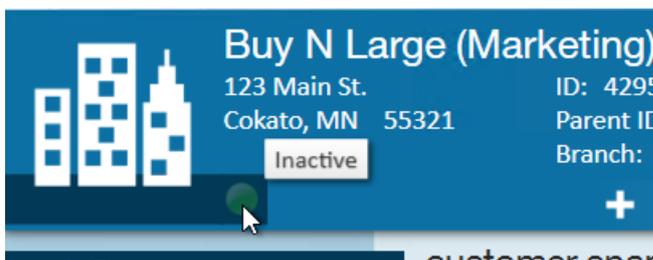
Below is a short description for each of the icons located in the Avatar area:

Active Status



A circle icon located in the bottom left of the avatar area on the customer icon indicates whether the customer record is active. Active records indicate prospective or current customers while deactivated customer records indicate customers not currently being worked with.

- Green = Active
- Grey = Inactive



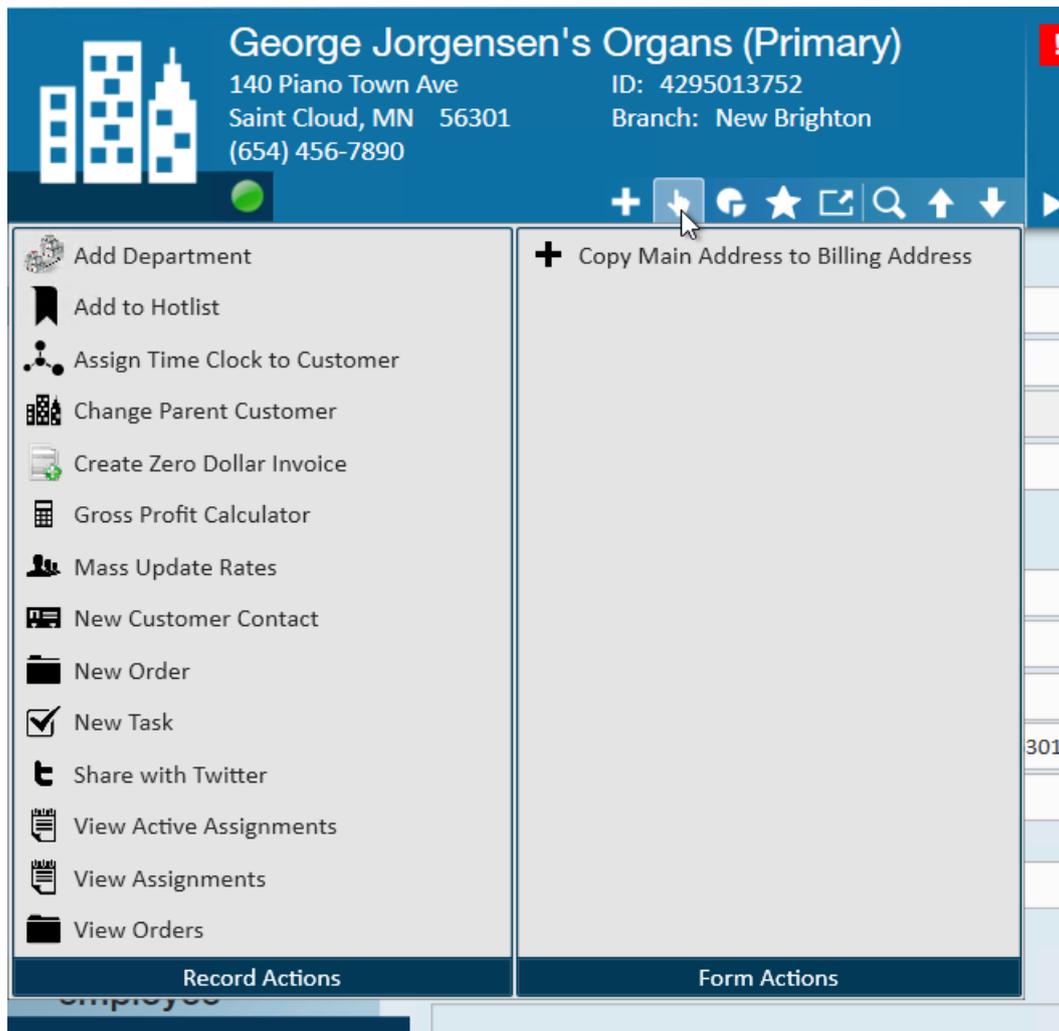
To learn more about customer statuses, check out [Enterprise - Default Customer Statuses](#).

New Customer Record

To quickly create another customer record, select the + icon in the Avatar area of any customer record.

Actions Menu

The actions menu will give you access to additional related actions on this customer record. Here you can create [new orders](#), use a [gross profit calculator](#), and more.



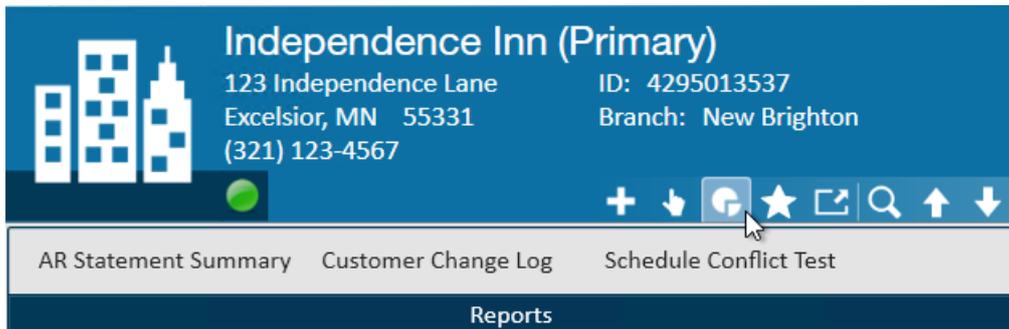
1. **Add Department:** Opens the “add new department” form and will create a new department record directly beneath the customer record you are currently viewing. Check out [Enterprise - Departments](#) for more information.
2. **Add to Hotlist:** Opens the “add hotlist members for customer” form where you can add the open customer record to an existing hotlist or create a new hotlist. Check out [How to Create and Manage Hot Lists](#) for more information.
3. **Assign Time Clock to Customer:** This option allows you to assign a TempWorks TimeClock to this customer record. Check out [TimeClock Overview](#) for more information.
4. **Change Parent Customer:** Opens the “move customer” form and allows users to change the location of the customer/department within a customer hierarchy. Check out [Enterprise - How to Change a Parent Customer](#) for more information.
5. **Create Zero Dollar Invoice:** Allows you to create a zero dollar invoice for AR. Check out [Enterprise - How to Create a Zero Dollar Invoice](#) for more information.
6. **Gross Profit Calculator:** Opens the gross profit calculator so that users may calculate the estimated gross profit percentage and amount based on the pay rate, bill rate, duration and estimated hours per week worked. Check out [Enterprise - How to Utilize the Gross Profit Calculator](#) for more information
7. **Mass update rates:** Opens the mass update options for assignments. Check out [Enterprise - How to Mass](#)

[Update Assignment Rates](#) for more information.

8. **New Customer Contact:** Allows you to quickly create a new contact associated with this customer. Check out [Contact Record Must Haves](#) for more information.
9. **New Order:** Allows you to create a new order record for this customer. Check out [Enterprise - How to Create and Manage Temporary Orders](#) for more information.
10. **New Task:** Opens the “task details” form and automatically assigns the task to the logged in service rep and links the task to the currently open customer and department record. Check out [How to Utilize Tasks](#) for more information.

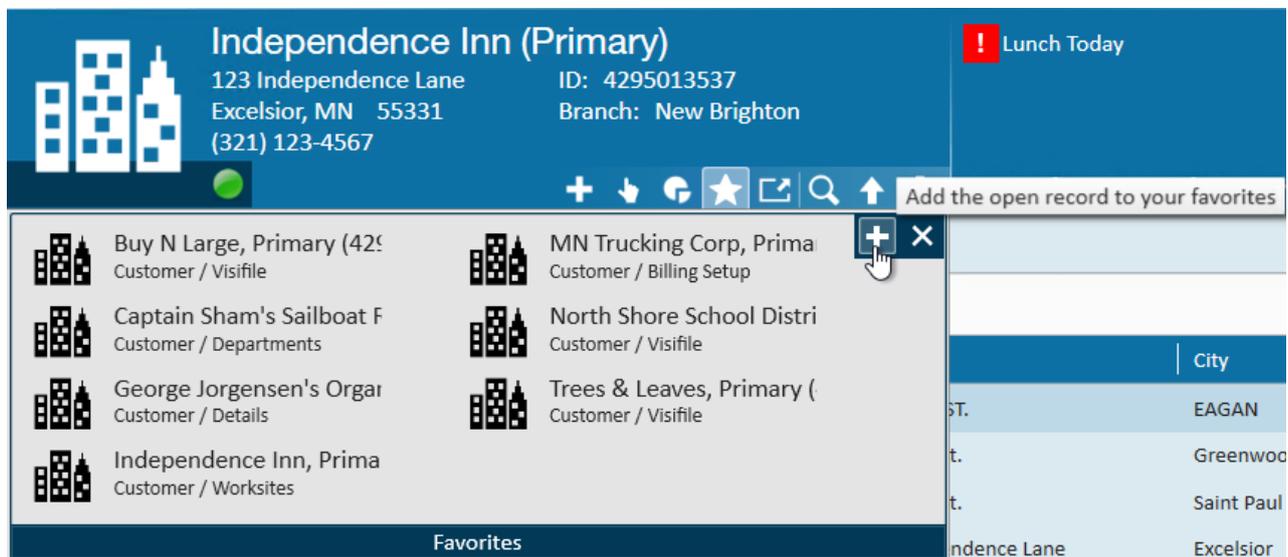
Reports

Selecting the pie chart icon will give you a list of reports that you can pull for this specific customer.



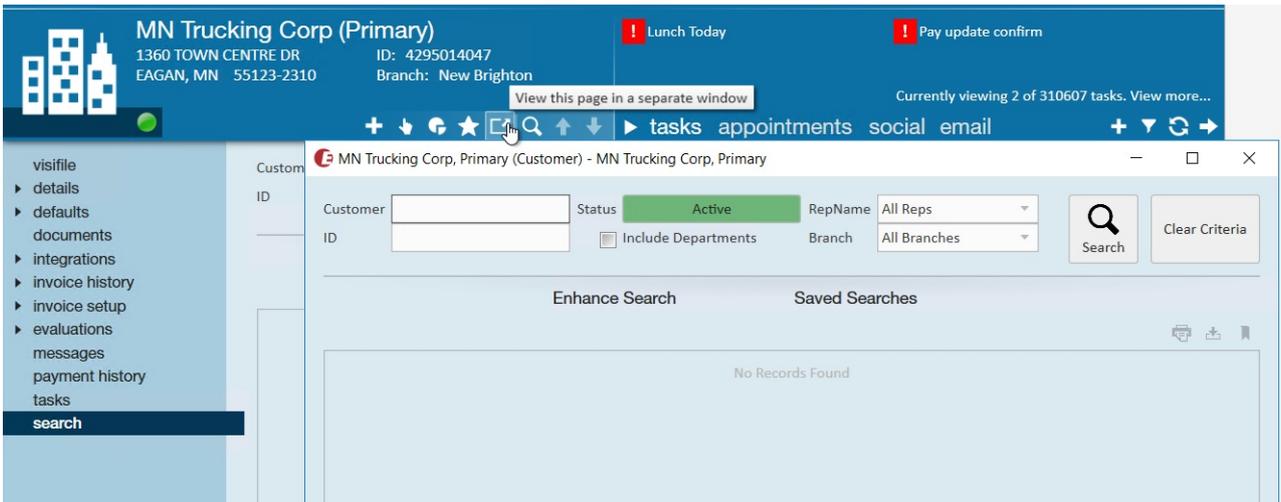
Favorites

Selecting the star icon will display a list of your favorited customer records. you can add and remove favorites from here:



Tearaway Page

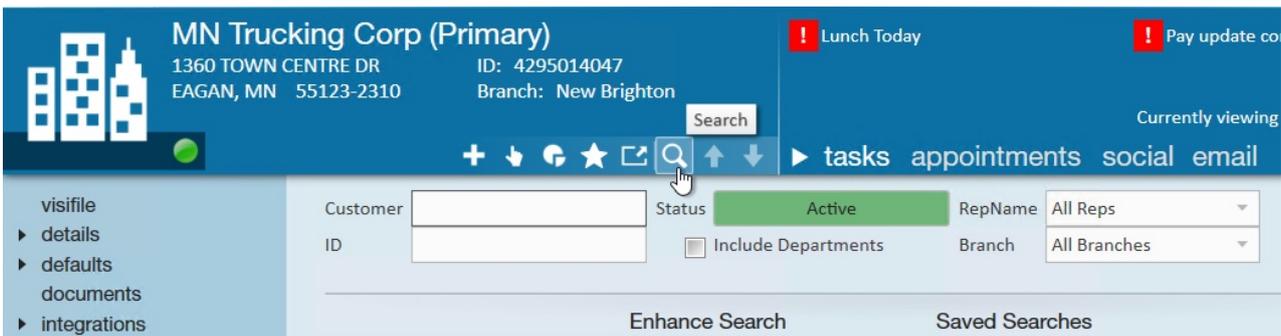
The tearaway page option allows you to open the current page you are viewing in a new window.



To learn more, check out [The Tearaway Page](#).

Search Options

The magnifying glass will open the customer search option. The arrows will allow you to move between customer record search results.



To learn more, check out [Searching](#).

Related Articles