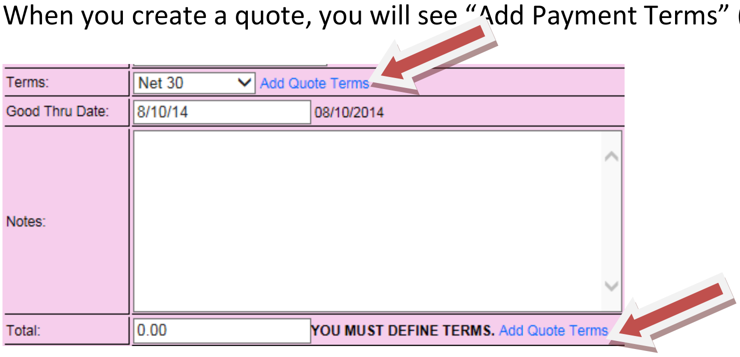
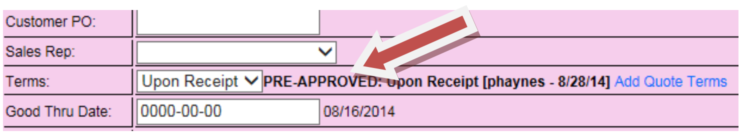
USING THE CREDIT FORM

Unless the customer is PRE-APPROVED, you will NOT be able to enter a dollar amount in the Total field until you add Terms for THIS quote/job.

When you create a quote, you will see "Add Payment Terms" (used to say Add Quote Terms). Click it to add terms.



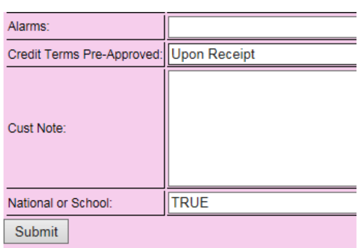
If the Customer is pre-approved, it will say so. There is no need to click "Add Payment Terms" except to add custom credit verbiage:



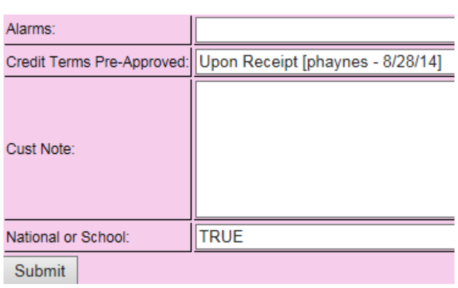
<u>ADDING PRE-APPROVED TERMS to customer record</u>

Click on the blue link on the Quote, Message, Work Order or Customer record (when searching for clients). Open the Customer form for editing. Look for the "Credit Terms Pre-Approved" field. Enter their pre-approved terms.

This is what it looks like when you type in whatever the pre-approved terms are (before hitting submit).

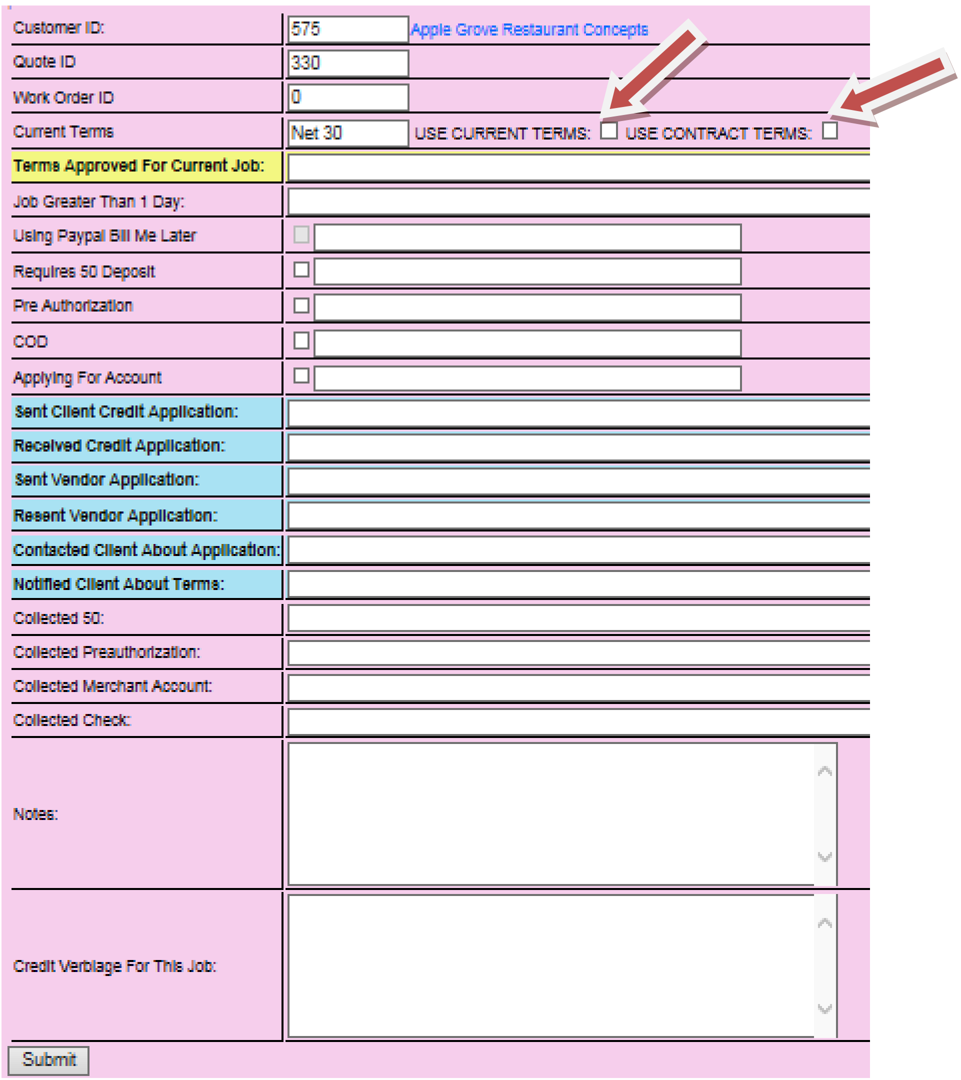


This is what it looks like AFTER hitting submit. Notice that is adds the date and the username of whoever added information there.



The Credit form looks like this. THE MOST IMPORTANT PART is the yellow section for "Terms Approved for Current Job". This locks or unlocks the ability to add an amount in the Quote Total field, or enter something in the Work Order Confirmation field. You don't have to touch that field, as it will auto fill according to your other choices. If you are unsure of the terms, then click USE CONTRACT TERMS, which will say the quote is pending mutual agreement on terms.

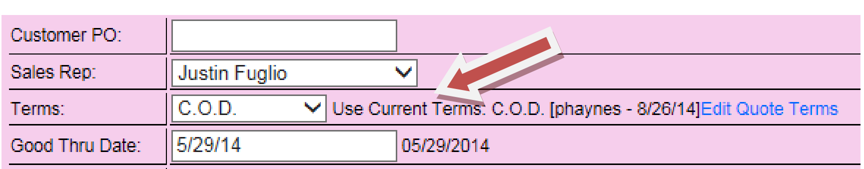
The blue section is only used to track the progress of a credit application. The section below it is optional for tracking how the customer paid, entering internal notes, and entering custom credit verbiage to show on the quote.



Customer ID:	575 Apple Grove Restaurant Concepts
Quote ID	330
Work Order ID	0
Current Terms	Net 30 USE CURRENT TERMS: ☐ USE CONTRACT TERMS: ☐
Terms Approved For Current Job:	
Job Greater Than 1 Day:	
Using Paypal Bill Me Later	☐
Requires 50 Deposit	☐
Pre Authorization	☐
COD	☐
Applying For Account	☐
Sent Client Credit Application:	
Received Credit Application:	
Sent Vendor Application:	
Resent Vendor Application:	
Contacted Client About Application:	
Notified Client About Terms:	
Collected 50:	
Collected Preauthorization:	
Collected Merchant Account:	
Collected Check:	
Notes:	
Credit Verbiage For This Job:	

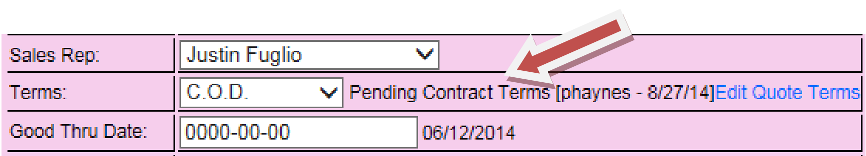
Submit

To use the <u>current terms</u>, simply click the "USE CURRENT TERMS" checkbox and press Submit.



Customer PO:	
Sales Rep:	Justin Fuglio
Terms:	C.O.D. Use Current Terms: C.O.D. [phaynes - 8/26/14]Edit Quote Terms
Good Thru Date:	5/29/14 05/29/2014

If you are quoting a job that will use <u>Contractual Terms</u>, simply click "USE CONTRACT TERMS" and press Submit.

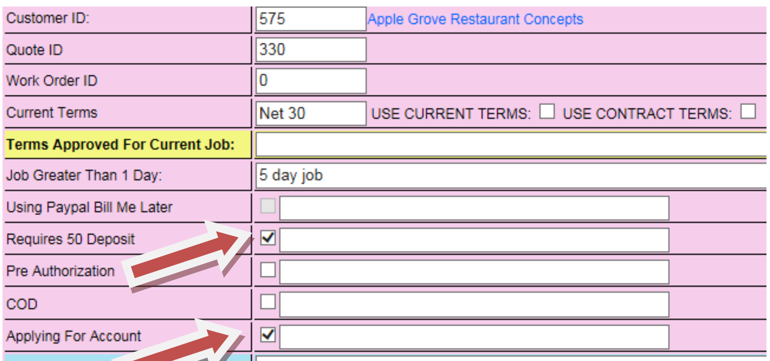


Sales Rep:	Justin Fuglio
Terms:	C.O.D. Pending Contract Terms [phaynes - 8/27/14]Edit Quote Terms
Good Thru Date:	0000-00-00 06/12/2014

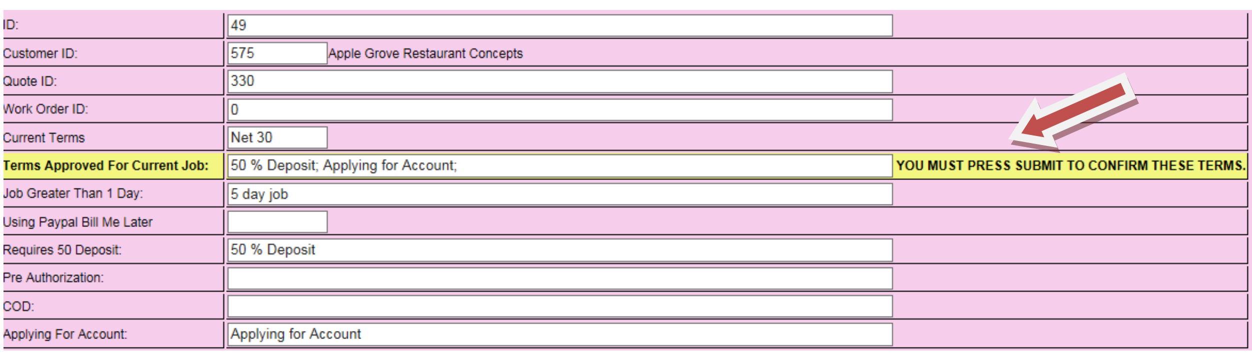
The yellow “Terms Approved For Current Job” will now say what options you have approved.

- Close the Window.
- Press Submit on your Quote to see the changes.
- Notice that there is now a link that says “Edit Payment Terms” so you can modify the information.

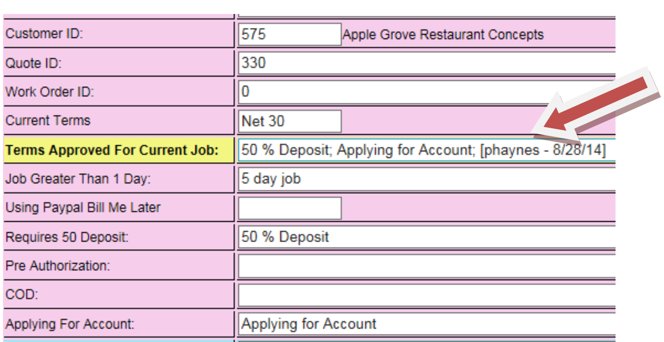
For any other terms combinations, you can either click the appropriate checkboxes or type in information in the appropriate boxes. You can also type custom wording in the “Credit Verbiage For This Job” field at the bottom of the form.



If you use checkboxes for “Requires 50 Deposit”, “Pre Authorization”, “COD” or “Applying for Account”, <u>you must press Submit one more time to confirm your selection</u>. Notice that “Terms Approved For Current Job” does NOT have a name and a date added – that is how you know it is not saved yet.



This is what it looks like after pressing Submit again, with [username – date] after it.



The quote looks like this now. Note the Job Terms with the [username – date]. Now you can enter a Total for the quote.

Site Address:	Apple Grove Restaurant Concepts, 400 Interstate Parkway, Suite 1200, Atlanta, GA 3
Customer PO:	
Sales Rep:	Louie Lincoln
Terms:	Net 30 50 % Deposit; Applying for Account; [phaynes - 8/28/14]Edit Quote Terms
Good Thru Date:	8/10/14 08/10/2014
Notes:	
Total:	0.00

When you view the Quote in Report View, it will select verbiage depending on which option you have chosen. Below is for a Net 30 customer for a 3 day job which requires 50% deposit, and which allows them to apply for credit. Note the INITIAL HERE line for them to request an application and acknowledge that if they are not approved, the other stated terms apply. We have also added the partial billing clause as standard verbiage on quotes.

SCOPE OF WORK

TERMS: 50% due prior to start of job. Remainder due by check or credit card ON SITE on either the date the Fire Marshal is called for inspection, or the final day of service, whichever comes first. *You may apply for an account with us.*

___________ **INITIAL HERE** to request an application and to acknowledge that if you are not approved for an account, your method of payment will revert to the other stated terms.

We reserve the right to send partial billings for projects based on work completed. Payment due according to agreed upon terms.

When you create a Work Order from the Quote, it will carry over the Terms for this job.

Add another Work Order (for existing Customers only).

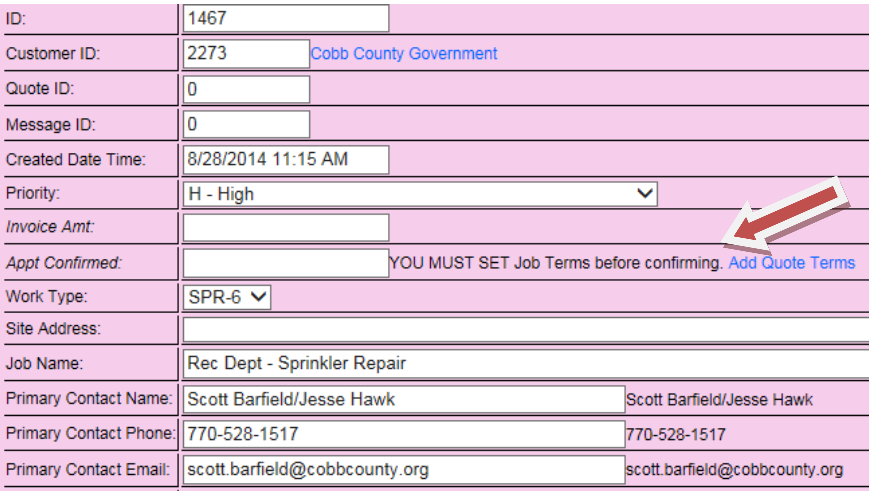
Customer ID:	575 Apple Grove Restaurant Concepts
Quote ID:	330 **QUOTE: $10,000.00** 50 % Deposit; Applying for Account; [phaynes - 8/28/14]Edit Quote Terms
Message ID:	0
Priority:	
Invoice Amt:	
Appt Confirmed:	50 % Deposit; Applying for Account; [phaynes - 8/28/14]Edit Quote Terms
Work Type:	
Site Address:	Apple Grove Restaurant Concepts, 400 Interstate Parkway, Suite 1200, Atlanta, GA 30339, Fulton Edit Add
Job Name:	Apple Grove Restaurant Concepts

Once you save the Work Order, it adds the Work Order ID to the Credit Form.

ID:	49
Customer ID:	575 Apple Grove Restaurant Concepts
Quote ID:	330
Work Order ID:	1468
Current Terms:	Net 30
Terms Approved For Current Job:	50 % Deposit; Applying for Account; [phaynes - 8/28/14]

Adding Credit to Work Orders created without Quotes

In order for a Tech to see a work order on their dashboard, the Work Order must have something entered in the "*Appt Confirmed*" field. If a Work Order does not have approved terms, you cannot enter anything in the Confirmed field.



ID:	1467	
Customer ID:	2273	Cobb County Government
Quote ID:	0	
Message ID:	0	
Created Date Time:	8/28/2014 11:15 AM	
Priority:	H - High	
Invoice Amt:		
Appt Confirmed:		YOU MUST SET Job Terms before confirming. Add Quote Terms
Work Type:	SPR-6	
Site Address:		
Job Name:	Rec Dept - Sprinkler Repair	
Primary Contact Name:	Scott Barfield/Jesse Hawk	Scott Barfield/Jesse Hawk
Primary Contact Phone:	770-528-1517	770-528-1517
Primary Contact Email:	scott.barfield@cobbcounty.org	scott.barfield@cobbcounty.org

Click "Add Payment Terms" and complete the form as for a quote in order to confirm your work order.

Accounting: Tracking of Credit Applications

Accounting can see all open Credit Applications at the top of the dashboard. They click on the name to edit the information.

Client	Sent Client App	Rec App	Sent Vendor App	Resent Vendor App	Contacted Client No Response	Notified Client
Fellowship Senior Daycare Center	8/10/14[phaynes - 8/28/14]					
Badcock Home Furniture	8/20/14[phaynes - 8/28/14]	8/21/14[phaynes - 8/28/14]	8/22/14[phaynes - 8/28/14]	8/25/14[phaynes - 8/28/14]	9/1/14[phaynes - 8/28/14]	

When the terms are determined, Accounting updates the Terms **in the Customer record** and **the job terms in the Credit form. Manually type in the terms in the "Terms Approved for Current Job" field**.

COD:	
Applying For Account:	Applying for Account
Sent Client Credit Application:	9/1/14[phaynes - 8/28/14]
Received Credit Application:	9/2/14[phaynes - 8/28/14]
Sent Vendor Application:	9/3/14[phaynes - 8/28/14]
Resent Vendor Application:	9/4/14[phaynes - 8/28/14]
Contacted Client About Application:	9/5/14[phaynes - 8/28/14]
Notified Client About Terms:	9/6/14[phaynes - 8/28/14]

The email icon is for Wendy to send an email to the department staff to inform them of the results of the credit application. It autofills the subject line with the terms in the CUSTOMER RECORD. We will have to determine if she then fills in the "Notified Client About Terms" when she sends the staff the email, or if the department must do that after they contact the customer.

ubject:	NOTIFY CUSTOMER ABOUT CONFIRMED CREDIT TERMS: Upon Receipt - Previous Thread Subjects: ( )
lessage:	*** *************** Company: PDH Dental Construction Site Address: Dr. Carter, 854 Cleveland Ave SW, Atlanta, GA 30344 Job Name: PDH Dental Construction / DR. CARTER - SITE VISIT (https://cliffsfireprotectionservices.com/work_order.php?id=2378&u=e)