

*Movers*Suite

User Guide

User Guide to Account Profiles

Setting up, understanding and using Account Profiles

User Guide to Account Profiles

Version 3.8 (Spring 2009)

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Account Profile



MoversSuite allows a company to establish records for commonly used accounts in its **Account Profile** module.

Key features of the Account Profile module:

- Create data records for commonly referenced accounts using the Account Profile Management interface. Information on account representatives, national accounts, services, etc. are maintained within this interface
- Base new account profiles on existing ones using the Account Profile Management new account process
- Set account information and other default data, such as assigned coordinators and salesperson, that will automatically populate a new sales lead or order
- Manage a list of account services that will display on each assigned order
- Account Profile tab grants non-managers access to account information and the ability to send emails to contacts, override defined services, and establish a primary contact for the order
- Automatic email notification will be submitted to account contacts when the load or delivery date has changed on orders to which they are assigned
- Save time by creating new profiles based on existing ones

The **Account Profile** system is comprised of two components:

- Account Profile Management
- Account Profile tab

Account Profile Management

The **Account Profile Management** interface allows managers to add, update, and delete account profile records. From this one screen, a user can set up default data that will be applied to an order automatically.

Access the interface through **MoversSuite > Tools > Manage > Account Profile**. If this option does not appear within the Manage menu, then the user's Security Profile does not have necessary access privilege. Refer to the [Account Profile Setup and Administration](#) section for details.

Figure 1: Account Profile Management available through Tools > Manage > Account Profile

[Click here](#) to view the entire Account Profile Management screen.

The interface is separate into six distinct sections that allow a user to set and view data for the following:

- National Account Defaults
- Customer Defaults
- Order Defaults
- Contacts
- Services
- General Notes

The following procedure describes how a user can define a new account profile record.

Creating a New Account Profile

1. In **MoversSuite**,
2. **Find** and open an existing order or define a New order,
3. Open **Tools > Manage > Account Profile** and the Account Profile Management interface will open,
4. Press **New** and the New Account Profile dialog will appear,

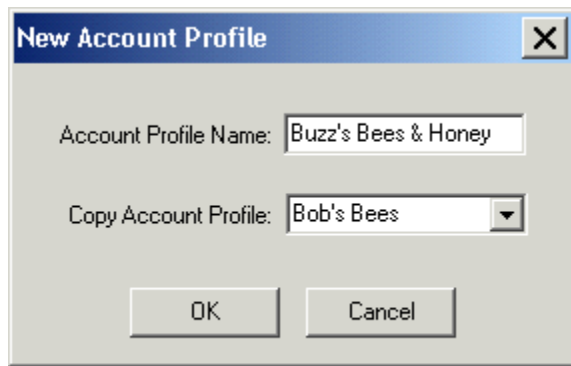



Figure 2: New Account Profile

5. Enter the **Account Profile** Name. This will be used as the reference for the new record throughout the application,
6. Optionally elect to **Copy Account Profile** by selecting a record from the available drop-down menu. All attributes associated to the record being copied will be inserted into the fields for the new record,

Note: All fields are optional except for the Account Profile name.

7. Select an **Account** within the National Account Defaults section to automatically set the **Billing Information > National Account** of the order,
8. Select a **Customer** within the Customer Defaults section to automatically set the **Billing Information > Customer** of the order. Use the Customer Find dialog available through the continuation button () to perform a more advanced customer find,
9. Update the invoice related fields for the **Bill To** address and **Invoice Terms** (refer to the [Invoicing](#) topic for details),
10. Add account representatives by pressing the **Add** button within the **Contacts** section. When Add is pressed the Add Account Profile Contact will appear. Update information for the contact and press **OK** to save the contact and close the dialog. Refer to the [Monitor Orders Service](#) section for details on setting up and using the contacts to receive email notifications.

Note: The Email address is very important since it will be accessible by non-managers through the Accounts Profile tab,

11. Add **Services** by pressing the **Add/Edit** button. This will open the Add / Edit Multiple Services dialog. Use this dialog to list services provided by the account. This list will be visible within the Account Profile tab. Include predefined services by placing a check in the **Include** box, selecting a **Status** from the list, and enter any necessary messages within the **Comments** field,

Note: Services represent the typical order assignments needed for the particular account. When a service is not needed, then users have an option to override them within the Account Profile tab. Refer to the [Overriding Account Service Status](#) section for more information.

12. Press the **Special Instructions** button to add a memo for either the origin or destination of the order as viewed through the **Billing Information > Special Instructions** feature,
13. Select **Order Defaults** as needed. All values set within this section will appear as defaults on the order,

Order Defaults:

Task Definition: Local HHG

Task Group: Local Move

Salesperson: B, Tim

Coordinator: W, Tara

Revenue Clerk: M, Teresa

Logistics Coordinator: W, Tara

Tariff/Rate: LNC

Contract:

Valuation: Normal Rate .60/lb

Per Pound: \$0.60

Figure 3: Account Profile Management > Order Defaults

14. Enter a message in the **General Notes** section. This note will appear automatically in the Account Profile tab. **Note:** This is just an account message and should not be considered a note attached to the order,
15. Press **Save** to keep the changes,
16. Press **Close** to exit the Account Profile Management interface.

Once the account profile has been added, it can updated or deleted, and can be referenced when establishing a sales lead or when creating an order.

Using Account Profile to Set Order Defaults

The default settings associated to an account profile can be linked to a sales lead or an order.

When a sales lead is created using the **New > Lead** option within MoversSuite, the user can specify an account to use within the Account Profile drop-down menu of the **Sales Lead Information** window.

Sales Lead Information

Created On: 10/2/08 11:32 AM Created By: A User Salesperson

Account Profile:

Last Name First Name & MI

Moving From Moving To

Figure 4: New > Lead interface

Important: If a salesperson is defined as an account default, then it will overwrite the Salesperson entered in the Sales Lead Information window.

The **Account Profile** tab can also be used to set the account and its related default settings. Further, a user can switch accounts using this tab as well. Refer to the [Account Profile Tab](#) section for more information.

The following table lists which default settings are applied to the order when an account profile is in use.

Potential order defaults set with Account Profile assignment:

Account Profile Management Field	Tab > Field Affected
Special Instructions	Move Information > Special Instructions
Account	Billing Information > National Account
Customer	Billing Information > Customer
Task Definition	Name,Address,Phone > Task Definition
Task Group	Name,Address,Phone > Task Group
Salesperson	Name,Address,Phone > Salesperson
Coordinator	Name,Address,Phone > Transportation Coordinator
Revenue Clerk	Billing Information > Revenue Clerk
Logistics Coordinator	Name,Address,Phone > Logistics Coordinator
Tariff/Rate	Billing Information > Tariff/Rate
Contract	Billing Information > Contract
Valuation Type	Move Information > Valuation
Contacts	Account Profile > Contacts
Services	Account Profile > Services
General Notes	Account Profile > General Notes

Account Profile Tab

The **Account Profile** allows a user to select an account from those defined within the Account Profile Management interface.

Account Profile: 4A Account

Contacts:

Name / Description	Title	Address
Allan User	Rep.	120 North

General Notes:

This is a general note that will automatically attached to orders assigned to this account profile.

Services:

Override	Service	Status	Comment
	Automobile	Approved	

Figure 5: Account Profile tab

In addition to selecting an account, a user can perform the following functions using right-mouse click options:

- Send Email
- Set Primary Contact
- Override Service

Send Email to Account Representative

The **Send Email** option is available by selecting a record with a right-mouse click. The Send Mail option will be active if an email address has been entered for the selected user.

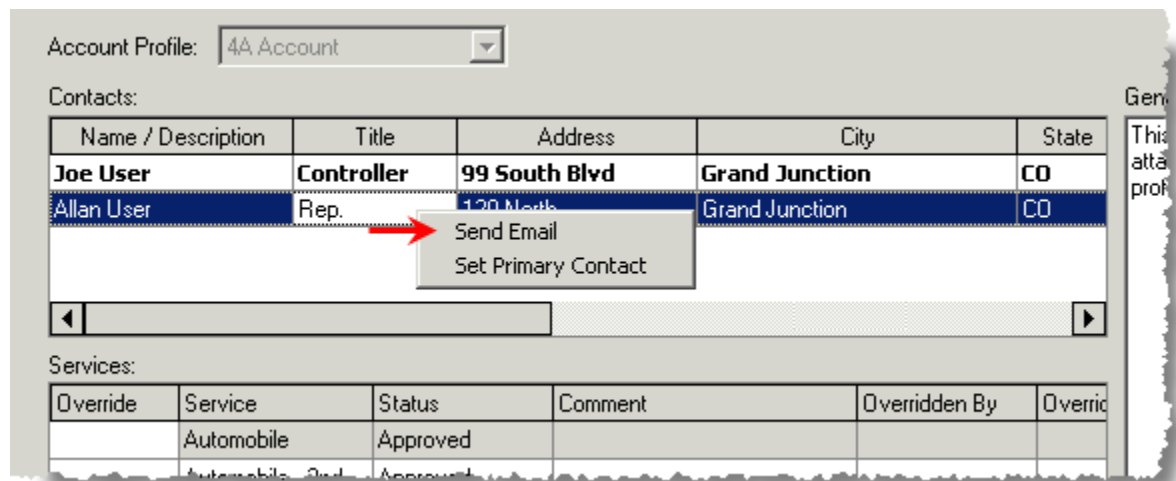


Figure 6: Account Profile > Contacts > Send Email option

When this option is selected a Microsoft Outlook window will open with the contact's email address set for the **To** address.

Refer to the [Monitor Orders Service](#) section for more information.

Setting the Primary Account Contact

Available through a right-mouse click is the option to set a primary contact for the account. Performing the **Set Primary Contact** option will display the selected record first in the Contacts grid and in bold-weighted font.

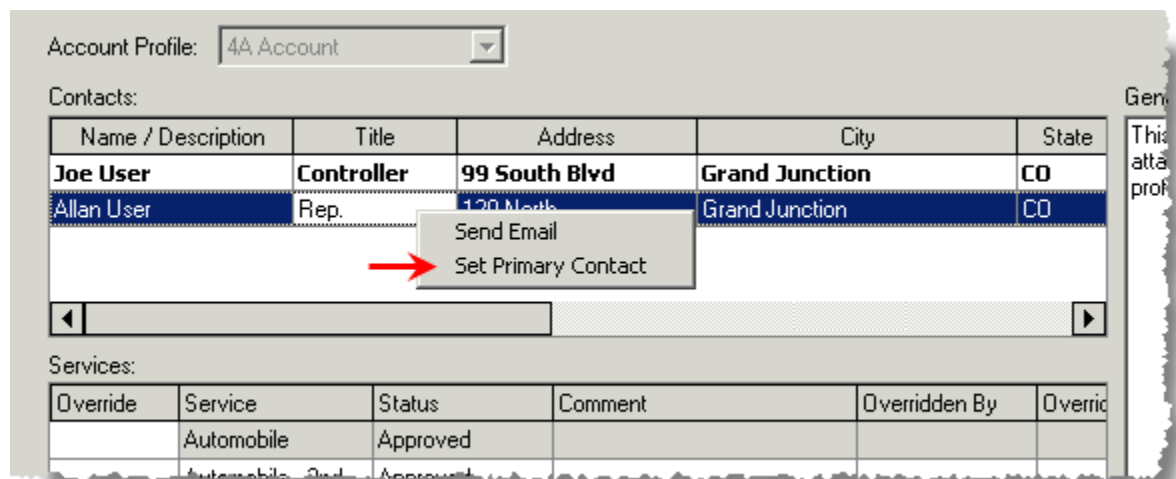


Figure 7: Account Profile > Contacts > Set Primary Contact option

Changing Accounts on an Order

The account profile can be changed for the order. Changing the account will cause all defaults to be overwritten by the new account.

Important: A user cannot change the Account Profile of an order if revenue has already been posted for the order.

Change the Account Profile on an Order

1. In **MoversSuite**,
2. **Find** and open an existing order,
3. Open the **Account Profile** tab,
4. Press **Edit**,
5. Select an **Account Profile** from the available list and a confirmation will appear,

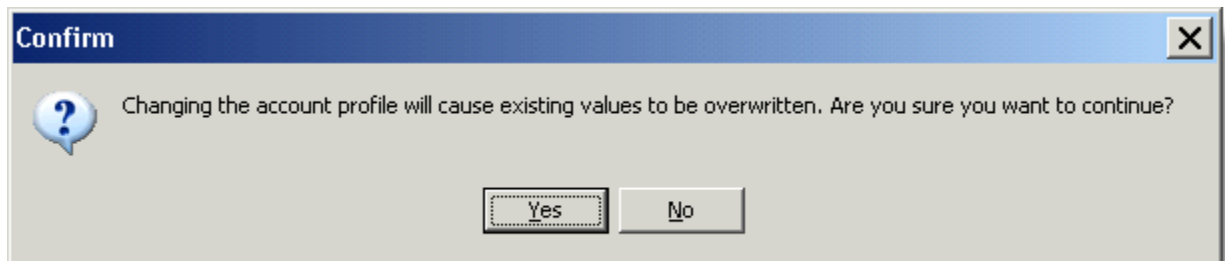


Figure 8: Changing the Account Profile confirmation dialog

6. Press **Yes** to continue with the account change and all data for the new account will replace that of the old,
7. Press **Save** to keep the changes and to close the tab to editing.

Overriding Account Service Status

The services that are listed for the order can have their status overridden from within the Account Profile tab. The **Override Service** option is available through right-mouse click on a selected record within the Services grid.

Override	Service	Status	Comment	Overridden By	Overrid
	Automobile	Approved			
	Automobile - 2nd	Approved			
✓	Boat > 14 ft.	Approved	es	A User	9/26/2
	Crating	Approved			
	Excess Valuation	Call			
	Partial Pack	Approved			

Figure 9: Account Profile > Services > Override Service option

Once the Override Service option is evoked, the Service Override dialog will appear prompting the user to select a status and enter a comment as the reason why the override occurred. The default status is set defined within the Account Profile Management interface.



Figure 10: Service Override dialog

Account Profile Setup and Administration

Security Profile Settings for Account Profiles

The **Security Profile** settings associated to the **Order Information** module are what determine access to the Account Profile Management interface and Account Profile tab for each branch.

Module	Branch	Access Type	Manager
Order Information	U0221	Full	<input checked="" type="checkbox"/>
-select one-	-select one-	-select one-	<input type="checkbox"/>

Figure 11: MoversSuite Administration - web > User Setup > Security Profile settings

Set the Order Information Module attributes within the **MoversSuite Administration - web > User Setup > Security Profile** setup for each branch. Reference the table below for an explanation of these attributes.

For each Branch, the available Account Profile settings are:	Granted Account Profile privileges
Order Information module has an Access Type of Read Only	<ul style="list-style-type: none"> Cannot change Account Profile within Account Profile tab Can set the primary contact Can send emails to contacts Can override services
Order Information module has an Access Type of Full	<ul style="list-style-type: none"> Same as Access Type of Read Only only except: Can change Account Profile within Account Profile tab
Order Information module has an Access Type of Full and the Manager flag is set	<ul style="list-style-type: none"> Same as Access Type of Full except: Can access the Account Profile Management interface (available through MoversSuite > Tools > Manage > Account Profile)

Note: The Security Profile is assigned to employees through the **MoversSuite Administration - web > User Setup > Personnel > User Setup > Security Profile** setting.

Related Account Profile Setup

The following administrative areas may need to be updated since they are referenced directly through the Account Profile tab and Account Profile Management interface:

Setup Area Related to	Administrative Setup Location
-----------------------	-------------------------------

Account Profile	
Contract	Mover's Suite Administration > AFS > Contracts
Coordinator	MoversSuite Administration - web > User Setup > Personnel (Labor Type)
Customer	Set up and maintained in Microsoft Dynamics GP
Logistics Coordinator	MoversSuite Administration - web > User Setup > Personnel
National Account	MoversSuite Administration - web > Move Setup > National Account
Revenue Clerk	MoversSuite Administration - web > User Setup > Personnel
Salesperson	MoversSuite Administration - web > User Setup > Personnel
Task Definition	MoversSuite Administration - web > Common > Task Setup
Task Group	MoversSuite Administration - web > Common > Task Setup > Groups
Tariff/Rate	Mover's Suite Administration > AFS > Rates > Rate Plans
Valuation Type	Mover's Suite Administration > General > Ins Opts

Refer to the [Account Profile Management](#) section for usage.

Note: An administrator can access the data behind the Account Profile Management interface through **MoversSuite Administration > MMS > Account Profile**.