

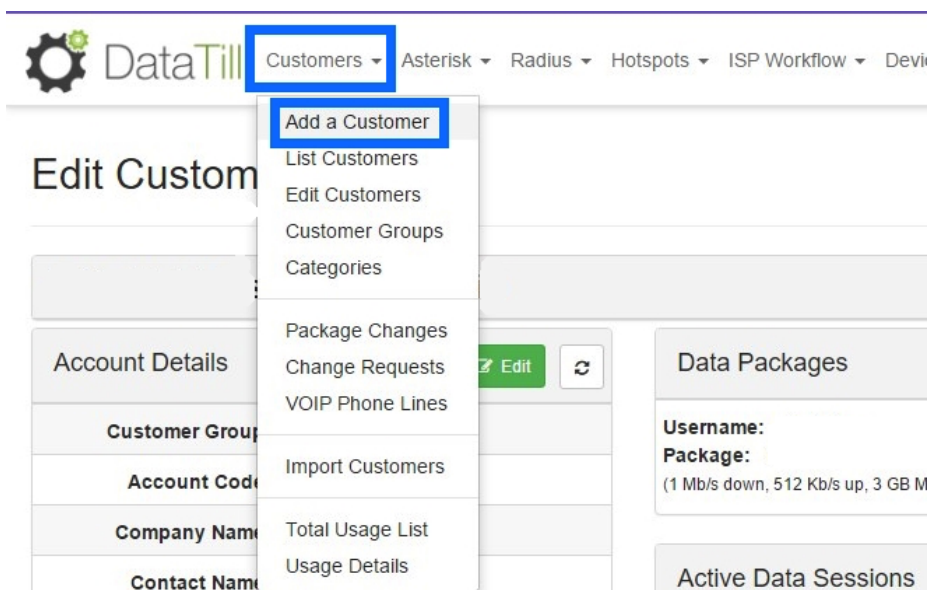
1. Adding new customers in HeroTill

There are two ways in which new customers can be added in HeroTill:

- Sales Module - Please refer to the Lead to Receipt guide for
- Manually adding new customers if you are not making use of the sales module.

In this guide, we will show you how to add customer's through both of these methods.

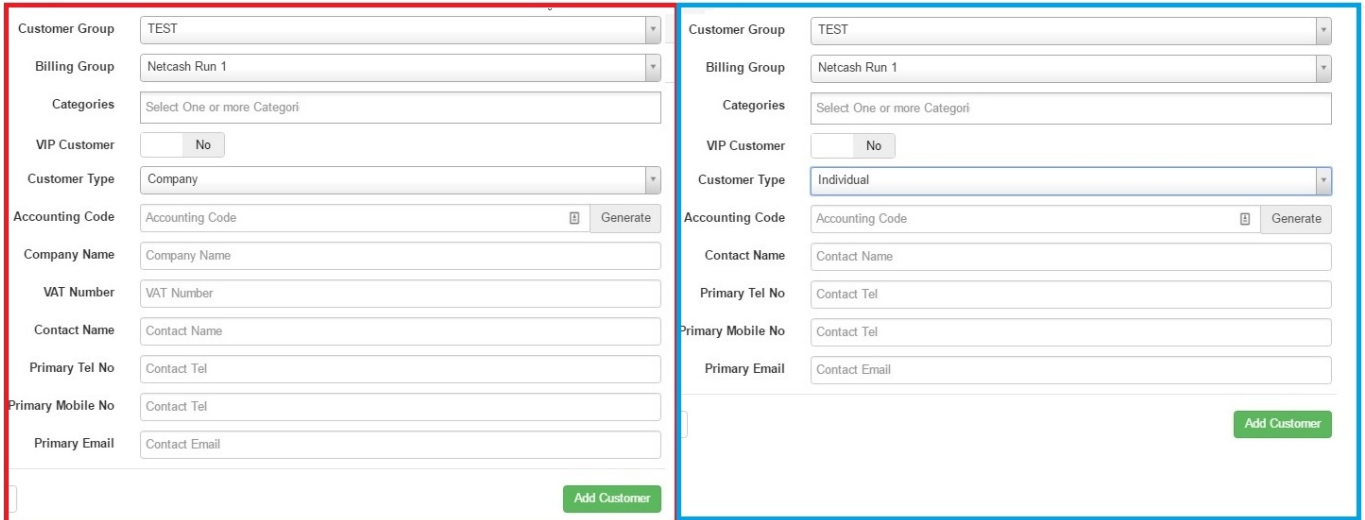
Primarily, all new customers should be added through the lead to receipt process to ensure that duplication of customer accounts do not take place. In the case that a profile should be split and a new profile should be created, or you do not make use of the lead to receipt process, then you will add new customers in this way. To add a new customer, go to the **"Customers"** and then click on the **"Add a Customer"** option.



1.1. Company vs. Individual customer.

Once you have done this, a pop-up screen will appear. On this screen, you can start filling in the details of the customer. Once the screen has popped up, you will have the option of choosing if it is a **company** or an individual **customer**. Obviously, there are differences between adding a new **customer** and adding a new company to the system. Adding a **company** has additional fields like Company Name, VAT number and contact name whereas adding a new individual **customer** has none of these.

Adding a new **Company** vs adding a new **Individual** customer.



Field	Company Customer (Red Border)	Individual Customer (Blue Border)
Customer Group	TEST	TEST
Billing Group	Netcash Run 1	Netcash Run 1
Categories	Select One or more Categori	Select One or more Categori
VIP Customer	No	No
Customer Type	Company	Individual
Accounting Code	Accounting Code (Generate)	Accounting Code (Generate)
Company Name	Company Name (Compulsory)	Contact Name
VAT Number	VAT Number	Primary Tel No
Contact Name	Contact Name (Compulsory)	Primary Mobile No
Primary Tel No	Contact Tel	Primary Email
Primary Mobile No	Contact Tel	
Primary Email	Contact Email (Compulsory)	

Although it is important that all detail should be filled in, there are some compulsory fields that are non-negotiable. Should one of these fields not be filled in, the system will show you which fields are compulsory, highlighting it in red. When adding a new company, the compulsory fields are - **Company name, contact name, contact tel, contact email** and of course the **accounting code** (Customer code). When adding a new individual customer, the required fields are - **Contact name, Contact Tel, Contact Email** and the **Accounting code** (Customer code).

1.2 Adding the details:

1.2.1 Customer Group & Billing Group:

Customer Group	TEST
Billing Group	Netcash Run 1
Categories	Select One or more Categorie

Pink: These are groups like staff, highsite owners, names of estates, resellers etc.

Purple: This is to define on which day the customers would like to have their Debit Order (DO) deducted. Please note that this differs from WISP to WISP. Please ensure that you know the date(s) on which your WISP runs DO batches and that you don't make promises to customers that you can't keep.

1.2.2 VIP Customer & Customer type.


VIP Customer	<input type="checkbox"/> No
Customer Type	Company

Blue: This is to mark the customer as an Important customer - for example, high paying customers will be marked as VIP.

Green: Choose whether the new customer is an individual or a company.

1.2.3 Filling in the customer details:

Before you can generate a customer code (accounting code), you will need to complete the customer or company's details first. Only once this information has been completed, will the customer's account code generate. In the **red** section below, you will see all the required fields that should be filled in for companies. In the blue section below, you will see all the required fields that should be filled in for normal home users and their families.

Company Name	Company Name	Accounting Code	Accounting Code		Generate
VAT Number	VAT Number	Contact Name	Contact Name		
Contact Name	Contact Name	Primary Tel No	Contact Tel		
Primary Tel No	Contact Tel	Primary Mobile No	Contact Tel		
Primary Mobile No	Contact Tel	Primary Email	Contact Email		
Primary Email	Contact Email				

1.2.4 Accounting code - a.k.a customer code.

The good news is that you don't have to figure out the customer code by yourself. The bad news is that the customer code is never allowed to change - even if the customer name/business name might have changed. After you have filled in all the customer's details, click on the "**Generate**" button and watch the system generate a code for the customer. It doesn't matter how many times you push the generate button, you will get the same code every time.

Accounting Code	Accounting Code		Generate
-----------------	-----------------	---	----------

1.2.5 Address Details:

Even though this is not a compulsory field when you are adding a customer, please remember to add this. Just click on the "Address Detail" tab and then fill in the **physical** or **postal** address. Next, you will need to complete the "**Address Detail**" tab. Here, you will need to add the **physical address** and **postal address** (if applicable). After adding the

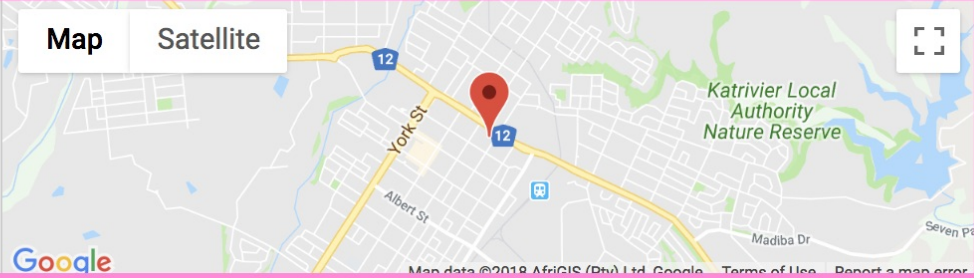
physical address, you can click on the “**Show on Map**” button. This will then pinpoint the location on the **map** and give you the customer’s **GPS Position**.

Please note that for this to work correctly, you will need to have a Google Maps API. For more information on this, you can refer to the following:

- **Webinar:** [Google Maps API](#)
- **Guide:** [How to get your Google Maps API](#)

Add a new Customer ✕

[Account Detail](#) **Address Detail** [Portal Login](#) [Billing](#) [SageOne](#) [Cancellation](#) [Master](#)

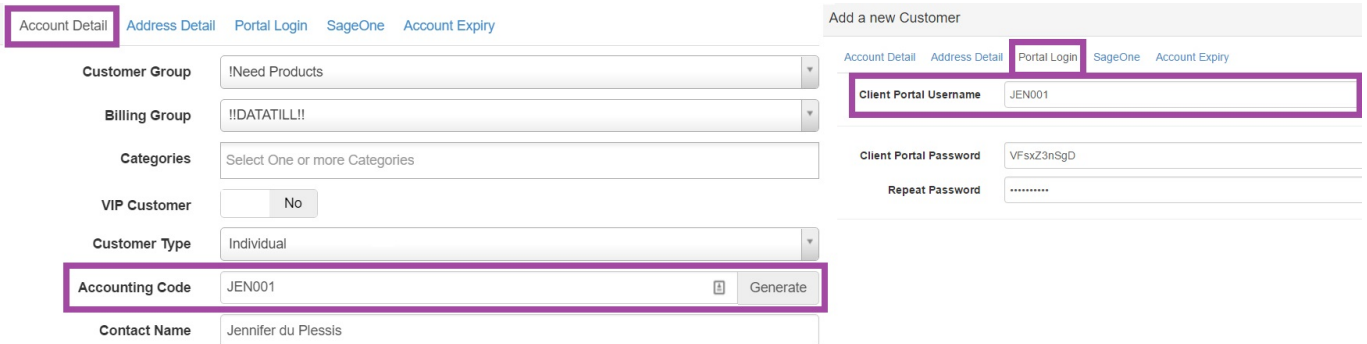
Physical Address or GPS Position Show on Map	123 Mitchell Street George Central George 6530 South Africa
Map Location	
GPS Position	-33.959642, 22.465499000000023
Postal Address	Postal Address

[Cancel](#) [Add Customer](#)

After completing all relevant fields, remember to click on the **“Add Customer”** button to ensure the customer profile is successfully created.

1.2.6 Portal Login:

This is related to the login details for the customer portal. This is not something you have to worry about or work on. As soon as you generate the customer code, the “**Customer Portal Username**” will automatically be filled in with the “**accounting code**”.



The screenshot displays the 'Add a new Customer' form with the 'Portal Login' tab selected. The form is divided into two main sections. The left section contains fields for 'Customer Group' (value: !Need Products), 'Billing Group' (value: !!DATATILL!!), 'Categories' (value: Select One or more Categories), 'VIP Customer' (checkbox: No), 'Customer Type' (value: Individual), 'Accounting Code' (value: JEN001, with a 'Generate' button), and 'Contact Name' (value: Jennifer du Plessis). The right section contains fields for 'Client Portal Username' (value: JEN001), 'Client Portal Password' (value: VFsxZ3nSgD), and 'Repeat Password' (value:). Red boxes highlight the 'Accounting Code' field and the 'Client Portal Username' field.

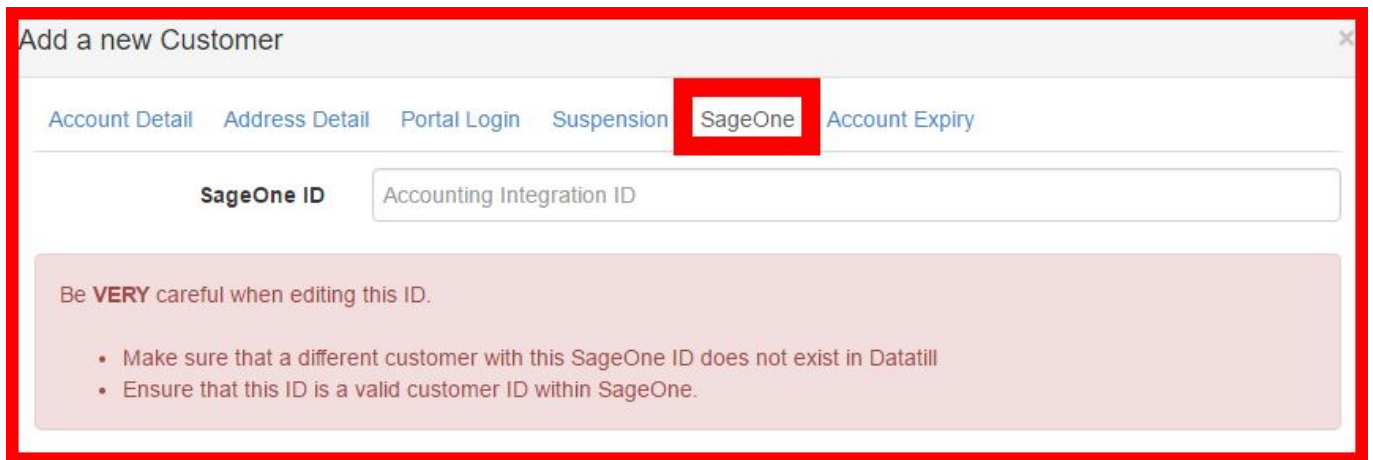
If the customer has forgotten their password, then you can send them a “**Reset Password**” link. To do this, go to the customer profile, look for the account detail section, and then click on the Blue “**Reset Password**” button.

Edit Customer

Jennifer de Frenco		
Account Details	Reset Password	Edit Refresh
Customer Group	TEST	
Account Code	[blurred]	

1.2.7 The SageOne ID:

This ID is related to the syncing functions with SageOne - the online accounting system we use for reporting functions. This ID will also automatically generate a number as soon as a new customer is created. This ID is never to be tampered with as this will ensure for lots of drama, syncing issues and a broken customer profile.



The screenshot shows a web form titled "Add a new Customer" with a close button (X) in the top right corner. Below the title is a horizontal navigation bar with tabs: "Account Detail", "Address Detail", "Portal Login", "Suspension", "SageOne", and "Account Expiry". The "SageOne" tab is highlighted with a red border. Below the tabs is a form field labeled "SageOne ID" with the placeholder text "Accounting Integration ID". Below the form field is a red warning box with the text "Be **VERY** careful when editing this ID." and two bullet points: "• Make sure that a different customer with this SageOne ID does not exist in Datatill" and "• Ensure that this ID is a valid customer ID within SageOne."

Even though it says “Be **VERY** careful when editing this ID”, please do not attempt to edit this without permission from the Systems Administrators.

1.2.8 Account Expiry:

This section is for the accounts department only. The accounts department will use this section for customers who need to be suspended due to non-payment as well as all customer who cancel their services with us. Remember to click the Save changes button before closing the screen.

- Pink:** Here you can see where to find the “Account Expiry” tab.
Blue: This is the section you use when a customer cancel their services.
Green: The big red button is the one you use when the customer doesn’t pay and they need to be **suspended**.

Add a new Customer ✕

Account Detail Address Detail Portal Login Suspension SageOne **Account Expiry**

Account Expiry Date

Reason for Expiry

Please Note:

- Use the last day of the month as expiry date
- All radius accounts will also be expired after this date
- All future recurring billing entries after this date will be removed

Immediate Account Suspension

Please note:

- All the customer's radius accounts will be blocked
- The customer will still be able to submit helpdesk tickets and view usage
- The customer will not be notified

1.3 Adding a customer from a sales lead.

The sales module will allow you to take your incoming sales lead from the first point of contact right through to the billing of the new sales. One of the steps will require you to create your new customer within HeroTill. To create you new customer, open your sales lead module and then go to the “**Customer**” - “**New**” section. Find the customer who’s profile you would like to create and then click on the “**Create Customer**” button found on the right-hand side of the screen.

Workflow

Customer » New

All Mine 10 records per page

All Sales Agents October 26, 2017 - October 26, 2018 + Add

Copy Columns Clipboard Export Columns CSV Export Columns Excel

Search

ID	Date	Description	Contact Name	Phone	Email	Assigned To	Status	Survey Status	Quote Status	Address	Sales Agent
9	2018-02-16 15:06:56		test1231521251		dean@dasddas.com	DataTill Support	Quote Accepted (a moment ago)	Not Required	Accepted	123 Mitchell Street, George Central, George, 6530, South Africa	DataTill Support

Showing 1 to 1 of 1 entries

Previous 1 Next

Leads 10 Surveys 1 Quotes 7 Customers 1 New 1

After clicking on the **“Create”** button, a pop-up screen will appear. On this screen, you will focus on the **“Account Detail”** tab. Information like company name (if applicable), the contact name, the mobile number, email address and the address detail will already be filled in. All that’s left to do is adding the rest of the information: Is it a **VIP** customer or not? Generate the **Accounting Code** and add the **primary telephone number**.

Add a new Customer ×

Account Detail | Address Detail | Portal Login | Suspension | SageOne | Account Expiry

Customer Group: TEST

Billing Group: Netcash Run 1

Categories: Select One or more Categori

VIP Customer: No

Customer Type: Individual

Accounting Code: Accounting Code Generate

Contact Name: Training Me

Primary Tel No: Contact Tel

Primary Mobile No: 0722966502

Primary Email: jennifer@herotel.com

Cancel Add Customer

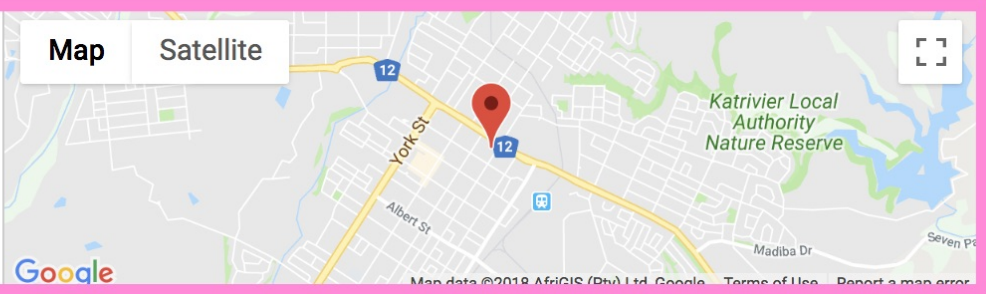
Next, you will need to complete the “**Address Detail**” tab. Here, you will need to add the **physical address** and **postal address** (if applicable). After adding the physical address, you can click on the “**Show on Map**” button. This will then pinpoint the location on the **map** and give you the customer’s **GPS Position**.

Please note that for this to work correctly, you will need to have a Google Maps API. For more information on this, you can refer to the following:

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Add a new Customer ✕

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Physical Address or GPS Position Show on Map	123 Mitchell Street George Central George 6530 South Africa
Map Location	 Drag the marker to mark the exact location on the map.
GPS Position	-33.959642, 22.465499000000023
Postal Address	Postal Address

[Cancel](#) [Add Customer](#)

After completing all relevant fields, remember to click on the **“Add Customer”** button to ensure the customer profile is successfully created.