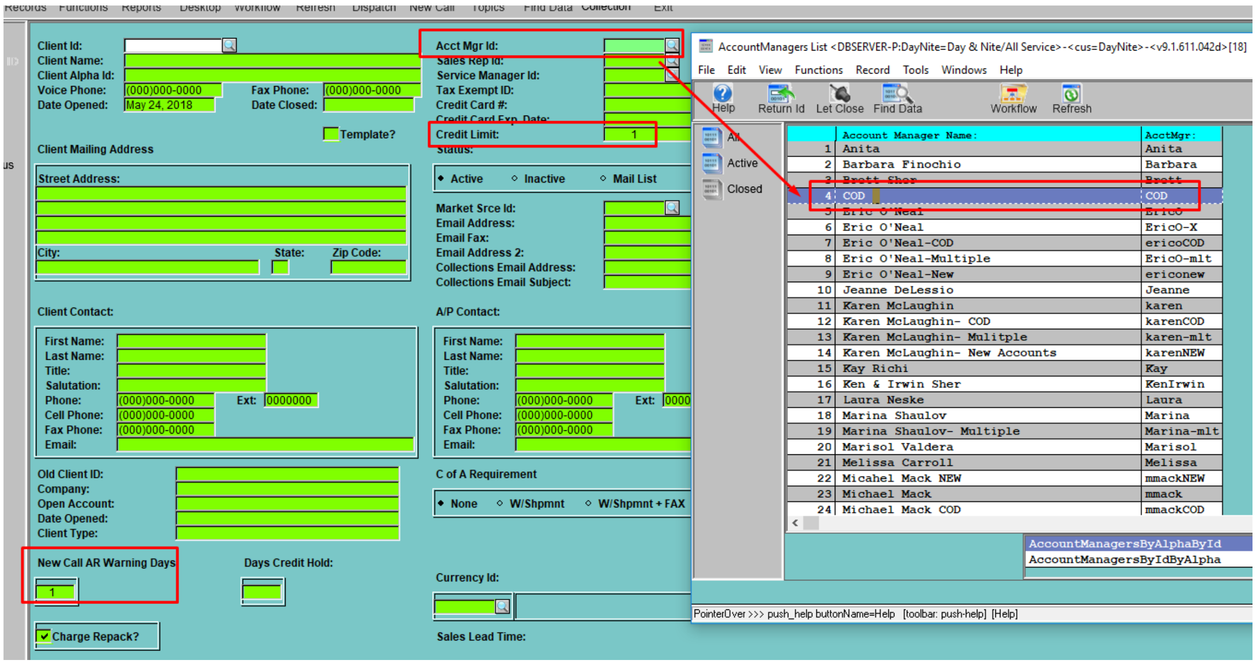
Entering New COD Customer Site ID/Job ID/Site ID (SamPro)

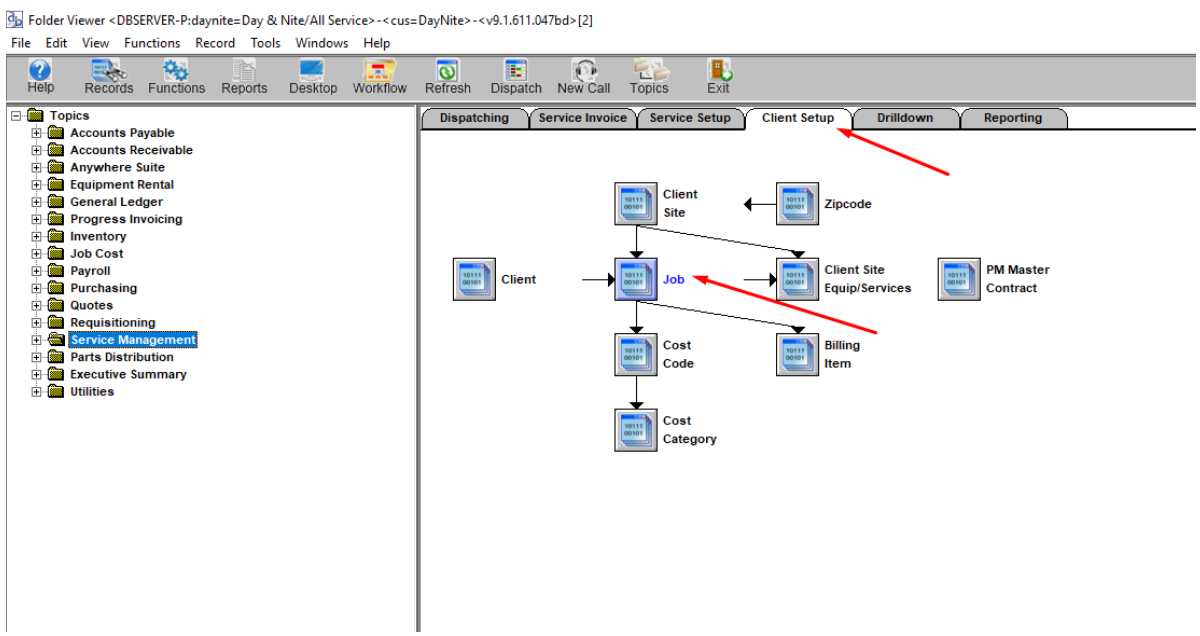
COD Customer - Not In The System/New Customer

1. Enter new **Client** in Sampro (in addition to standard SOP fields)

   1. **Account Manager = COD**
   2. **Credit Limit = 1**
   3. **New Call AR Warning Days = 1**



1. Go to Client Setup in workflow and select Job.



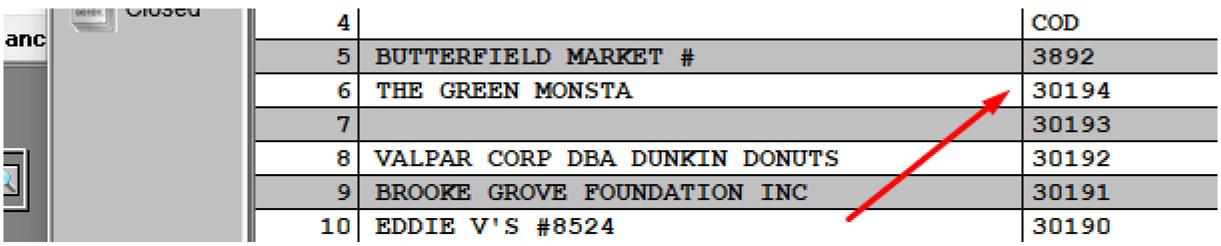
2. Enter the market (ALS, REF, DAC, etc.) followed by 000000-TM and double click.

   (Examples: ALS000000-TM, REF000000-TM, BOS000000-TM)

3. Click Clone Job and enter the fields (by clicking the eyeglass icon), starting with the client ID (make sure your setting is set to “ClientsByName”).

4. When picking your Client & Site ID you must click Client ID: twice to source numbers from least to greatest. Use the next number from the last listed.

   Example: In this case my client ID would be 30195 since 30194 is the last number listed.

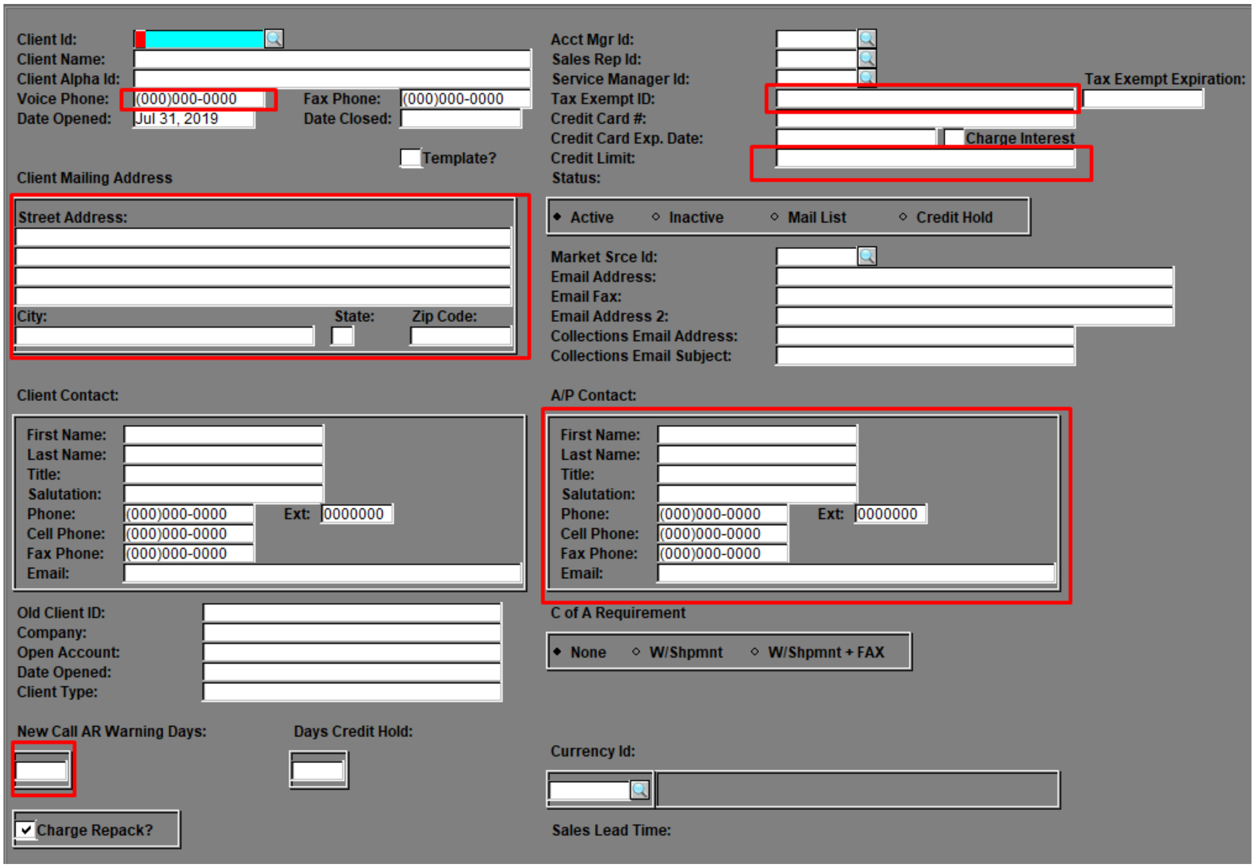


1. Repeat the same step to get your site id. (Make sure your setting is set to “ClientSitesById”)

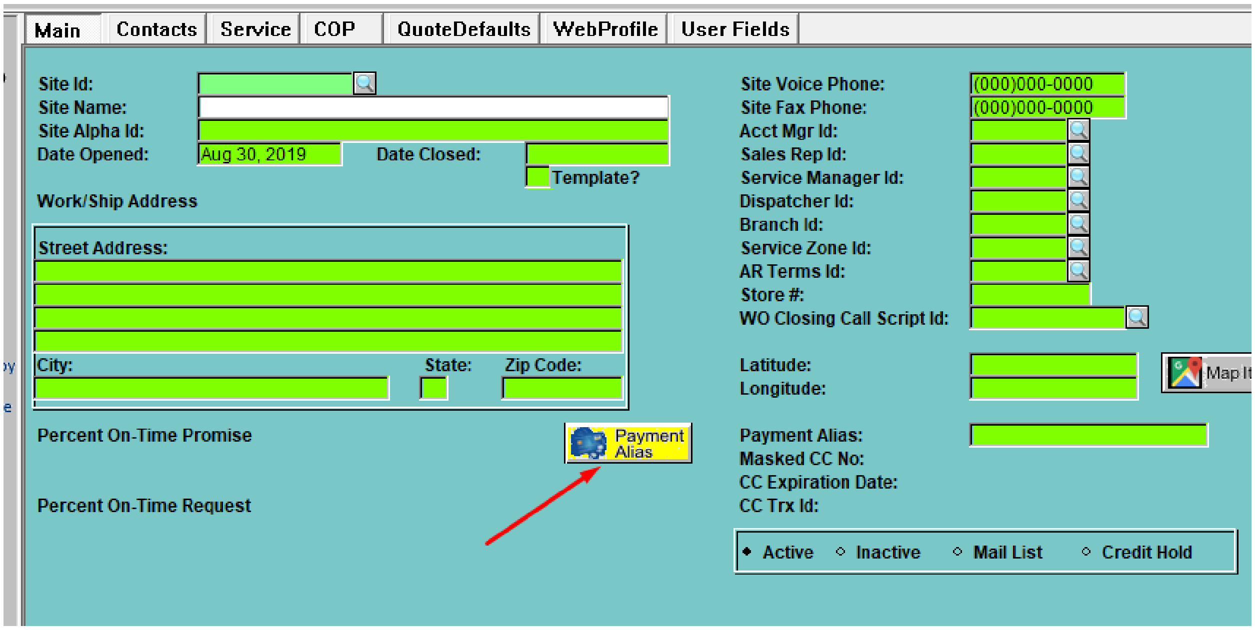
2. Fill in your Job ID. The Job ID must start with the market, followed by the site ID number, followed by -COD. (Examples: ALS213468-COD, REF213468-COD)

3. Fill in the Job, Site & Client Name with the name of the location. In some cases, the client name may not match the site name.

4. Fill out the necessary areas on the client page. Depending on the information provided you will enter the information in the appropriate areas outlined below. Once everything is filled in press save and exit window. (In this scenario your Credit Limit must be 1 and the AR Warning Days must be set to 1.)



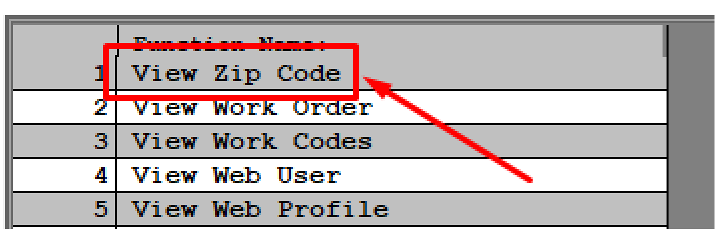
1. In the site screen, you must enter the fields highlighted below.
2. Before leaving the m**ain** screen press the **Payment Alias** button to enter the credit card information



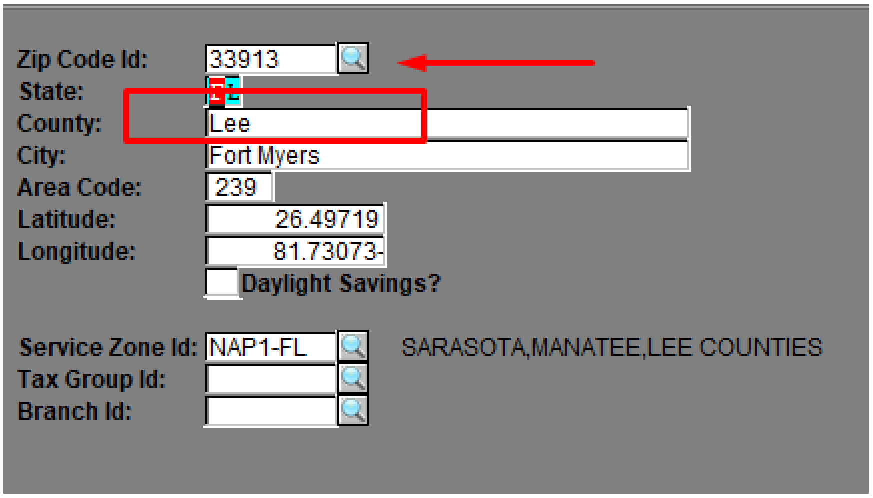
1. Click on Contacts and fill out the highlighted fields below.
2. Click on Service and enter COD in the Dispatch note and Billing Comments. Once done press save and exit window.
3. Once you're in the Job screen press refresh so the zip code of the new site generates. Enter the Tax Group Id & enter the Job Tax Status. If the client is tax-exempt you will choose exempt, if not choose sales. Place COD in the AR Terms.
4. If the location is an outer market (NCA, SCA, SFL, FLA) you may be unsure what the Tax Group ID is. Below see the steps on how to find the tax group ID.

- Click on Records at the top of the screen.

- Click Function Name once then click View Zip Code

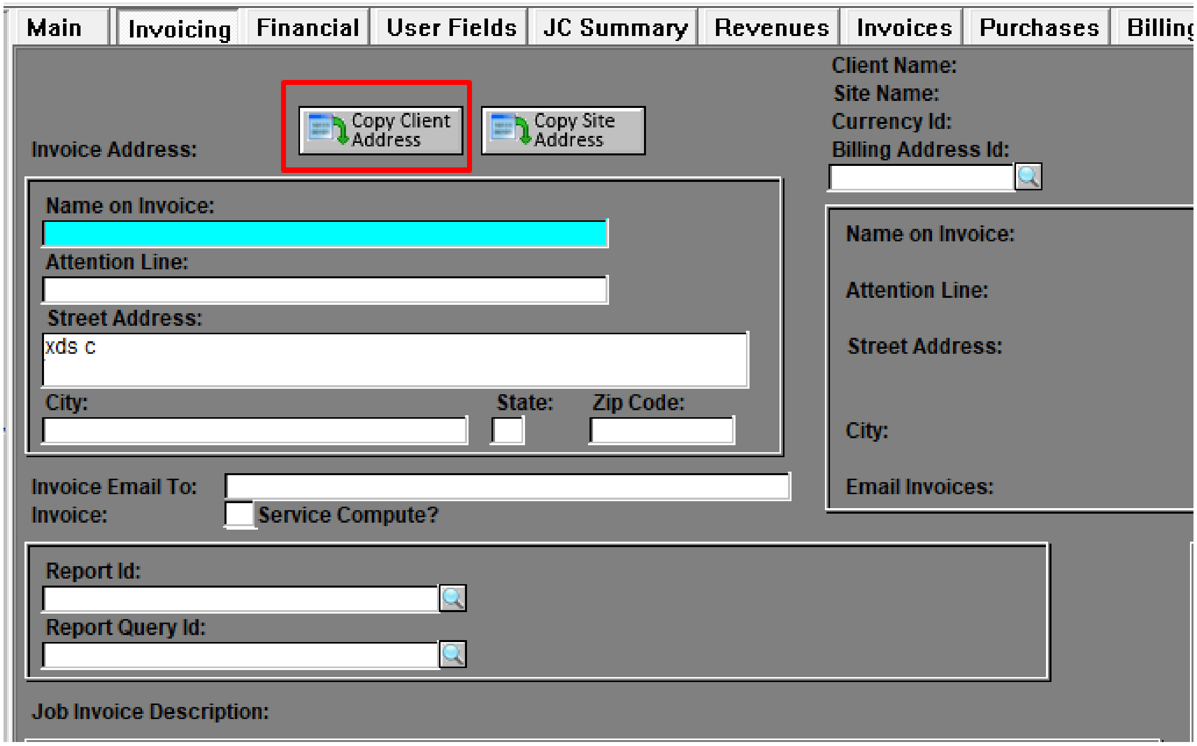


- Enter the zip code and retrieve the county.



- Once you have the county, go back to the job screen and click on the eyeglass icon for the Tax Group ID. Start typing in the county and it should pop up. Once the county is selected double click on it.

1. Once completed click on Invoicing. Then click Copy Client Address. The address for the client will automatically fill in. Then press Save.



2. Congrats you have successfully entered the account. Now enter your work order. Do not forget to get a credit card on file.