

Customer management

A customer can be a private person or a company. All customers have different terms and preferences, all of which must be maintained and updated.

Output from the customer management process

1. A new customer is registered.
2. The customer's terms are maintained.
3. The customer's contact information is maintained.
4. Customer relations are closed.

All you need to register on a new customer is name, address, payment and delivery terms, and contact information.

If there is a business relationship with larger customers, you will normally have relations with several contact persons. Some may be purchasers, while others work with invoicing or project management. These people need to be defined with their contact- and work information, in addition to which situations they will be contacted.

Tasks involved in this process

1. Register a new customer
 - A request or an order is received, and the requester must be registered as a customer.
2. Maintain and update the customers
 - Either expand or reduce the terms for the customer, update information and similar.
3. Document handling
 - Setting rules for customers regarding where the different documents will end up.
4. Communication with the customer
 - Sending out reports and other correspondence.

Create a new customer

1. To open the Customer (CUS) application, find Sales in the RamBase menu and then Customer management. Click Customers to enter the CUS application.
2. Click the Create customer button in the lower left hand corner of the CUS application
3. A new window appears where you can add customer main data. This can also be collected via the Brønnøysund integration. Search company name or enterprise number.
4. Due to the validation process, the Postal code and City field can not remain empty. If there is no postal code or city, enter a placeholder character ("0" or ".") to continue.
5. As soon as all mandatory data (fields marked with *) have been entered, click the OK button to create the CUS in status 1.
6. It is still possible to add additional data on the CUS.
7. In the Settings tab, enter relevant settings. Settings can be updated at all time. These settings will be used as default values and will be copied to documents, such as Sales Order (COA).
8. In the Document handling tab, enter how documents are to be handled and where they are to be sent by e-mail, print etc.
9. You can add several addresses in the Shipping addresses tab. The Set as default column to the far right controls which of these addresses will be used as the default address for this user during document creation.
10. In the Contacts tab, add data about employees that work for the customer. Click the Select contact button to add a contact to the customer. Click the Create contact button to create a new Contact (CNT) and add it to the customer.
11. To activate the customer, click the Activate customer option in the context menu. This action will activate the customer and set the status code to 4.

VIES VAT number validation

The VAT Information Exchange System (VIES) validates single VAT numbers of any business entity registered in the EU when you enter the VAT number in the Customer (CUS) or Supplier (SUP) applications, or when the CUS or SUP applications are opened.

1. If you enter a valid VAT number for a business entity based in the EU, a message displays, stating that the VAT number is valid and registered in VIES.
2. Select Update name and address to retrieve the entity name and address from the VIES database.
3. A notification message is displayed in the application that the VAT is registered in VIES. The validation is performed every time you select a customer or supplier based in an EU member nation. If the service is unavailable for any reason and the VIES validation was not done, no notification is displayed. If the VAT number is not valid, the notification states that VAT not registered in VIES. If you hover over this notification, a popup notification states that VAT number is not valid or not registered in VIES.
4. If there is a mismatch between the address held in RamBase and the retrieved address, a notification is displayed in the General Settings. Select Update name and address to overwrite the currently entered address with the address retrieved from VIES.

Customer Group (CUG)

Grouping of customers is registered in the Customer group (CUG) application.

How to create a customer group

1. From the RamBase menu, click on Sales followed by Customer management and then on Customer groups to enter the Customer group (CUG) application.
2. Click the Create new customer group button at the bottom of the screen.
3. Enter a descriptive name for the customer group and click Create.
4. Click the Add customer button to add customers to the group.
5. Click the Activate button at the top to set the Customer group (CUG) to Status 4. It is now active and ready for use.

Note: It is possible to import customers to the group using the Import Customers button from the context menu. This will open a popup where you choose which format you want to use and then you will be able to load the customer files.

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How to use a customer group

A customer group is used in situations where several customers need to be processed similarly.

Uses in RamBase:

- When a Purchase quote (SQU) is exclusive to a group of customers. This function is found in the Resale tab in the Purchase quote (SQU) item.
- An Item Price Agreement (IPA) can be restricted to be used by a single customer, all customers or customer groups.

Document handling

It is possible to control the document logistic in RamBase by predefining the recipients of specific documents for a given Customer (CUS). These settings can be controlled from the Document handling tab in the Settings tab in the CUS application.

How to add document handling rules for a customer

1. Enter the customer you want to set document handling rules for.
2. Click the Document handling tab in the Settings tab. Click the Add document to send button.
3. This button opens a new popup where you can add information
 - Send byChoose which method to send, which may be Email, Print or File Transfer Protocol (FTP/SFTP).
 - FTP applies to sending EHF invoices (EDI). There is an integration with the ELMA registry that checks if the enterprise number is registered in ELMA. An error message will appear if the enterprise number is missing from the customer or is not registered in ELMA.
 - Document to send
Choose which document you want to send.
 - Mandatory to always send
The recipient cannot be deleted on a specific document if this is selected.
 - Send to
Choose to send it to the customer's main email address or which contact you want to send this to.

Note: If you want to change the output for any of the documents, choose the item line you want to change and click the edit icon. This will open a popup similar to the one where you defined the rule, but this popup is specific to one document and contains a field where you choose the output for this specific document.

Link an article to a price agreement

1. To open the Article (ART) application, find Product in the RamBase menu and then Product management. Click Products to enter the ART application.
2. Highlight the specific ART and press ENTER.
3. Click the Create ARTSALESPRICE icon in the Sales Prices section in the Main Data folder.
4. In the new popup, select a price agreement for a customer group from the drop down menu in the PriceGroupAgr field, or set a quantity in the SalesQty field. Note: Either the field SalesQty or the field PriceGroupAgr must have a value, but only one of them can be filled.
5. Add details to apply to the price agreement for this specific ART.
6. Note: Either the field SalesPrice or the field SalesGM must have a value, but only one of them can be filled.
7. Use the date pickers to set the time interval for the agreement to be valid.
8. Note: A price group agreement can not occur several times within the same time interval.
9. Click the Submit button.

Edit a price agreement

1. Start from the ART application.
2. Highlight the specific ART and press ENTER.
3. In the Sales Price section in the Main Data folder, highlight the item line representing the agreement and press ENTER.
4. Make changes and click the Submit button.

Link a customer to a sales price agreement

1. To open the Customer (CUS) application, find Sales or CRM in the RamBase menu and then Customer management. Click Customers to enter the CUS application.
2. Select the specific customer.
3. Enter the Sales and shipping tab in the Settings tab.
4. Select the price agreement(s) the CUS is to be linked to in the Sales agreements area. A customer can be linked to a price agreement based on volume, a common price agreement for a group of customers and a price list.

Whenever this customer places orders on articles linked to the price agreement(s), the sales prices will be set in accordance with the agreement.

Critical financial customer settings

Before trading with a new Customer (CUS), some financial settings are required. These settings are critical to the accountancy. Other settings are recommended for more details about each CUS. The financial settings can be found in the Settings tab on the CUS.

Required Feilds

1. Currencies
The currency(-ies) valid for this CUS. The field can contain more than one currency. You must at least register one currency. If you have agreed to invoice your CUS in local currency, this is the one you must choose.
2. Payment terms
You usually agree upon this when you start trading with a new CUS. Due date on invoices are calculated based on Payment terms.
3. VAT registration number
The Value Added Tax (VAT) registration number is a unique number assigned by the relevant tax authority. It is crucial to the VAT handling on the customer's transactions.
4. Enterprise number
This is the customer's legal entity, it is a unique enterprise number.

Recommended Feilds

1. Require approval if overdue
Click this checkbox if approval of documents are required before shipping, if already invoiced orders are overdue.
2. Credit limit
Credit limitations for the customer. Approval is required if the invoice amount exceeds the credit limit.

Rules for handling interests, reminders, VAT, and payment methods can be specified for each CUS. If nothing is specified, the company's default financial setup will be used.

Only use these fields if you want to overrule the company settings.

Sales Quoting

A quoting process is the process where one, if there are no set agreements or contractual obligations in place, agree with a customer regarding price, delivery time, payment terms and the product specification.

Output from the quoting process

1. Single transaction with agreed terms.
2. Contract for agreed terms within a defined period.
3. Declined offer given to customer.

Some products have a fixed price independent of the customer, while other customers are given a set price for specific products. Offering different prices depending on product and customer is standard practice in certain industries. This is mainly due to some customers being larger and expecting contractual prices on a larger product range, while smaller customers prefer to request quote prices on a case-by-case basis, or they are buying on standard sales prices.

This process is usually started with a request for quote, where information regarding price and availability are gathered and forms the basis of the quote.

After a quote is given to the customer, there will be a period where the quote is open for acceptance or rejection. Any negotiations regarding price and/or terms in addition to acceptance or rejection, are logged in the ERP system.

Tasks involved in this process

1. Receiving a request for quote
2. Create a quote
3. Send the quote
4. Create a contract quote
5. Follow up on the quote
6. Change a quote
7. Mark lost quotes

Order handling

Use the order handling process to specify the price, delivery time, payment terms, articles and quantities required, for an order.

Outputs

- Single sale with mutually agreed, confirmed terms.
- Contracted, recurring sales.
- Cancelled sale with mutually agreed, confirmed terms.
- Follow up on committed, undelivered orders, the customer backlog.

An order, which originates from a quotation, mainly contains the agreed terms that have been negotiated between you and your customer. An order, which requires confirmation from you to the customer, can be legally binding. Once you receive the order confirmation, you can add the order value in the company's income projections.

An order can also be generated without being preceded by a quotation. This may be because the order is small, or the customer has a preexisting agreement of terms to be applied to all orders, such as purchases from a web shop. These agreements may be written or verbal, containing the agreed terms such as delivery time and price. This solution reduces the delivery time and the time overheads of administration.

In addition to the several other tasks in the ordering process, you should also follow up the committed, but as yet undelivered, orders. This is the customer backlog. Within this task you can follow up the customer backlog based on requests or your internal routines. For example, get committed dates from suppliers and/or production, making sure that the orders are delivered according to committed schedules or attempt to expedite purchase orders/production if the customer's requested date is not met.

Follow up the customer backlog periodically to reduce delivery slippage. On-time deliveries can be increased by closely following up the backlog.

An order can be cancelled if necessary.

Tasks

- Receive an order. Creating an order where products, quantity, pricing and delivery terms are specified.
- Allocate goods. Make sure the goods are in stock or in production.
- Acknowledge the order. Send a sales order to one or several recipients.
- Follow up on the customer backlog. An order that is already acknowledged can still be cancelled or partially delivered.
- Amend an order. Upon request and agreement with the customer, create a new version of the sales order.

Sales Order Request (CPO)

A Sales Order Request (CPO) is a document where orders from customers are registered. The difference between this document and a Sales Order (COA) is that the CPO is not assigned to goods in stock or supplier backlog. The CPO are saved in the CPO archive and may be inspected using the CPO application.

To open the Sales Order Request (CPO) application, find Sales in the RamBase menu and then Order handling. Click Sales order requests to enter the CPO application.

An example of a CPO may be orders registered from a webshop or received by any other electronically format. RamBase will automatically create a CPO, which will be processed and transported to a Sales Order (COA).

Create a new sale order request

1. To open the Sales Order Request (CPO) application, find the Sales in the RamBase menu and then Quoting. Click Sales quote requests to enter the CPO application.
2. Click the icon Create new order request. Enter the customer name (enter parts of the name in the Name field and press ENTER). This will open a popup where you choose the customer, address and which currency you want to use. The customers default address will be shown automatically.
3. After this you will return to the Sales Order Request (CPO) document and it will have been assigned a sequence number. This means the document is saved and ready for further editing. You may also see that any default setting from the Customer document (CUS) related to the chose customer, has been entered automatically (such as delivery and payment terms).
4. The reference number from the customer may be set in the Customer reference no field. The reference person for the customer may be set in the field Customer reference.
5. To add articles to the CPO document, press the Create New item. This will open a popup where you enter relevant information. Choose the quantity in the Qty field and press ENTER. In the Product field, enter parts of, or the full product name to find it in the archive. If there is a fixed sales price on the article, you will see this appear in the Expected Price field. This may be adjusted.
6. The next step will be to set the information regarding when the customer need the goods. This is performed in the Requested Delivery Date field.
7. To add more articles easily, check the Create Another checkbox before clicking OK.
8. When finished, use the context menu option Register sales order request to set it to Status 4.

Follow up on Sales Order Requests

A Sales Order Request (CPO), being in the process of registration, may be edited and updated in several ways.

- To register a CPO, use the context menu option Register sales order request. The order is now closed for editing.
- To cancel parts of an order you may highlight the desired item line and press ENTER to open the CPOITEM. Choose the Cancel item option in the context menu. This may be used in cases where the customer only wants parts of the goods for the same terms.
- To confirm the order, you may easily transport this to a Sales Order (COA). There are two methods of doing this, either if it is the whole CPO or just parts to be ordered. The criteria for transporting items from a CPO to a COA is that the CPO is in ST:4 or higher. This status indicates that the CPO has been registered.
- To transport parts of an order request to a sales order, highlight the item line and press ENTER to open the CPOITEM. Click the Forward to sales order... option in the context menu. Then choose Forward to new order if the item line is to be added to a new packing list. If not you may choose Forward to existing order and select an existing COA. If the item lines to be transported has a quantity higher than 1, you may choose the quantity transported.
- To transport a whole CPO to a COA, Click the Forward all items to sales order.. option in the context menu. Choose the Forward to new order if the CPO is to be transported to a new COA. If not, you may choose Forward to existing order and select an existing COA.

Subscriptions

A subscription process may be defined as the process where something is sold on a subscription basis. Subscribers will order the goods automatically, unless cancelled by the subscriber in advance.

Output from the subscription process

- Contract sale to agreed terms within a defined period.
- Declined sale presented to customer.

Examples of subscription sales are books sold in a book club, stamps in a stamp club or magazines from a publisher.

The subscription is often limited to a period, where the subscriber is rewarded for committing over a certain period.

Tasks related to this process

- Creating a subscription
Set terms for the subscription, such as period, membership and frequency.
- Creating offers concerning the subscription
Offers can be sent out concerning the subscription to all subscribers.
- Creating subscription orders
Orders will be automatically created if they are not cancelled in advance by the subscriber.
- Maintain subscribers
Subscribers sign up and off. This overview must be maintained.

Sales Reporting

Sales Reports

There are several types of sales reports in RamBase. To list these reports, type RPM SALES into the program field and press ENTER. This will open a window with a line referring to sales reports. If you highlight and press ENTER on the lines, you will get a categorized overview over most sales reports in RamBase.

All reports in RamBase can be viewed on the screen, exported to a CSV file or printed out directly from RamBase. Depending on the priority of the reports they may be exported by file in, or outside, the core time, which is 08:00 - 16:00 CET.

To access a report on screen you can double click on the line in RPM, where it will be opened ready for inspection.

To export a report to print you will need to enter the report and right click, to open the action menu and choose the option Report by Email/Print. This will open a popup where you may choose the desired output using the drop down menu in the SendTo field. Then you need to set destination in the Printer field.

To export a report to print you will need to enter the report and press F12 to open the action menu and choose the option Report by Email/Print. This will open a popup where you may choose the desired output using the drop down menu in the SendTo field. Then you need to set destination in the Email Address field. At the bottom of the popup you will see when the file will be received at the set destination.

The sales reports are divided into Three categories: Customer Management, Order Handling (shows booking and backlog reports among others) and Quote Handling (typical for following up and see won/loss) Billing reports can be found under Finance module and shipments under Warehouse.

Customer Backlog (CUSBACKLOG)

The Customer Backlog (CUSBACKLOG) is a report with extensive filtering possibilities which gives an overview of expected revenue separated into categories and expected delivery dates.

To open the Customer Backlog (CUSBACKLOG) report, find Sales in the RamBase menu and then Reports. Click Backlog overview to enter the CUSBACKLOG report.

The application lists backlog by customer as default. The deliveries are listed in accordance to their confirmed date. Use the Group By field to list by e.g currency, seller, partnumber, warehouse etc.

To see the pending deliveries of a single customer, select the customer and press ENTER.

Project order (POD)

Purpose of the Project order (POD) application

This is an internal work tool that can be used by companies to carry out a job, which include working hours, materials and other costs. The purpose of the Project Order (POD) application is to have a tool that can be used to provide a cost/price estimate in advance, and a place to log hours and follow up logistics after a project order has been started. This solution will also show correct accrued costs along the way and be the basis for invoicing to the customer.

There are two pricing models for project orders:

- Time & Material (T&M) - The agreement is that the customer will pay based on the real accrued cost.
- Fixed Price - The agreement is that the customer pays a fixed price regardless of the real accrued cost.

Regardless of the pricing model, a Project order (POD) can be partially invoiced during the entire process, for example monthly or when milestones are reached. A Project order (POD) can also be external or internal. An external Project order (POD), is always related to a customer. An internal Project order (POD) can e.g be a development project, where cost of hours and materials can be linked to this Project order (POD).

Cost and sales in project orders are not booked directly to the general ledger. The material cost is based on the same way as one calculates cost in stock, the cost is a part of the Project (POD) after one has confirmed pick of material.