BigTime Waste and Recycling Company
National Account Sales and Services

September 1, 2000

NOTE TO VIEWER OF THIS SAMPLE

This sample is from a 41-chapter user manual that serves personnel from three departments who interact with the NACS billing and customer service system. Included in this sample is

- **The title page and its verso (this page)**
- **The table of contents**
- **Chapter 10: Setting Up & Updating Locations.**

This user manual is about 400 pages in length and is intended to be printed double sided.

Contents C

Setting Up & Updating Locations 10

Chapter Overview

Setting up a new location is a relatively straightforward process once the customer has been set up. This process consists of two procedures. Later, it is usually necessary to update the standards.

Chapter Overview

Chapter Procedures

In this chapter you will find detailed instructions for the following procedures:

Procedure Set Up a New Location

Situation

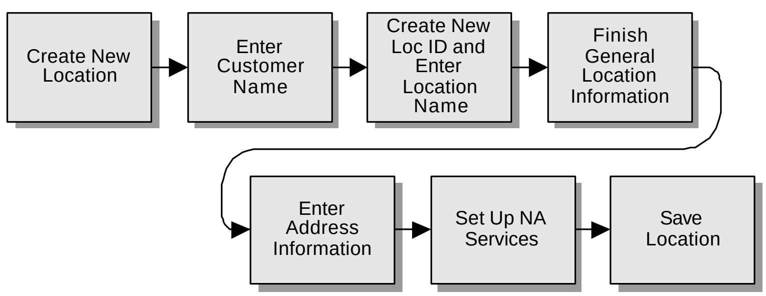
You can get to this procedure in several ways:

- You are setting up a brand new customer and have multiple locations to set up. **STOP!** There is an easier way to do this. See the Data Team to upload the location list.
- You are setting up a new location from scratch.
- You were trying to create an account, and the *Location Locator* showed that there was no location matching that on the invoice.

You are now ready to create the new location.

Procedure Overview

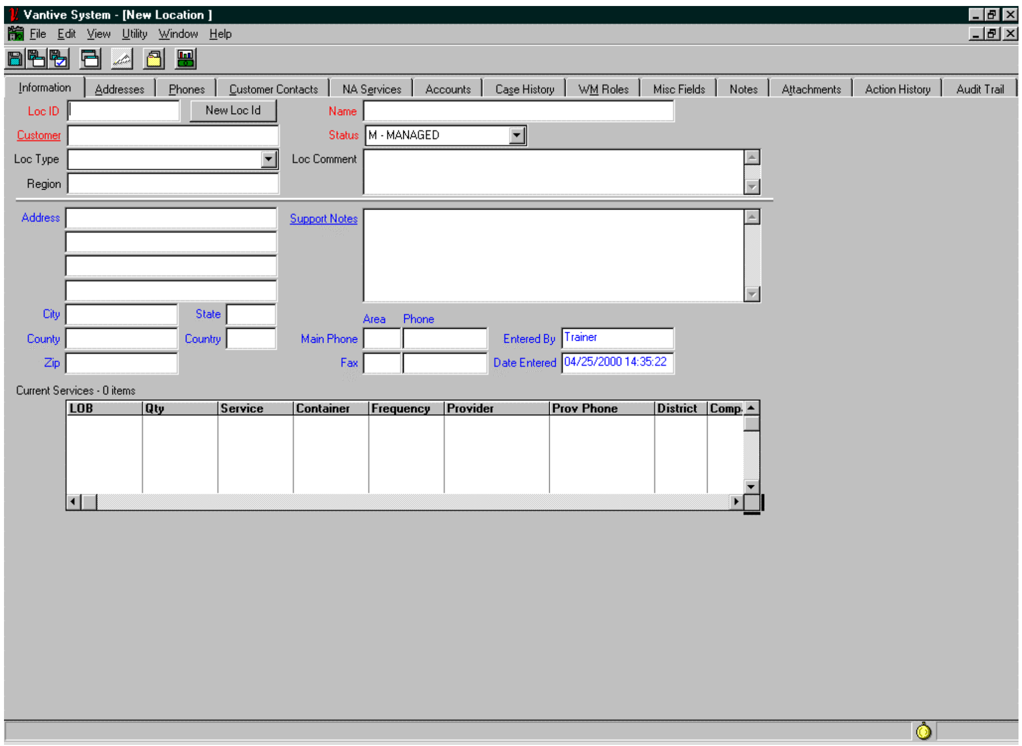
The major tasks in this procedure are shown in the following graphic.



Procedure Overview

Create New Location Record

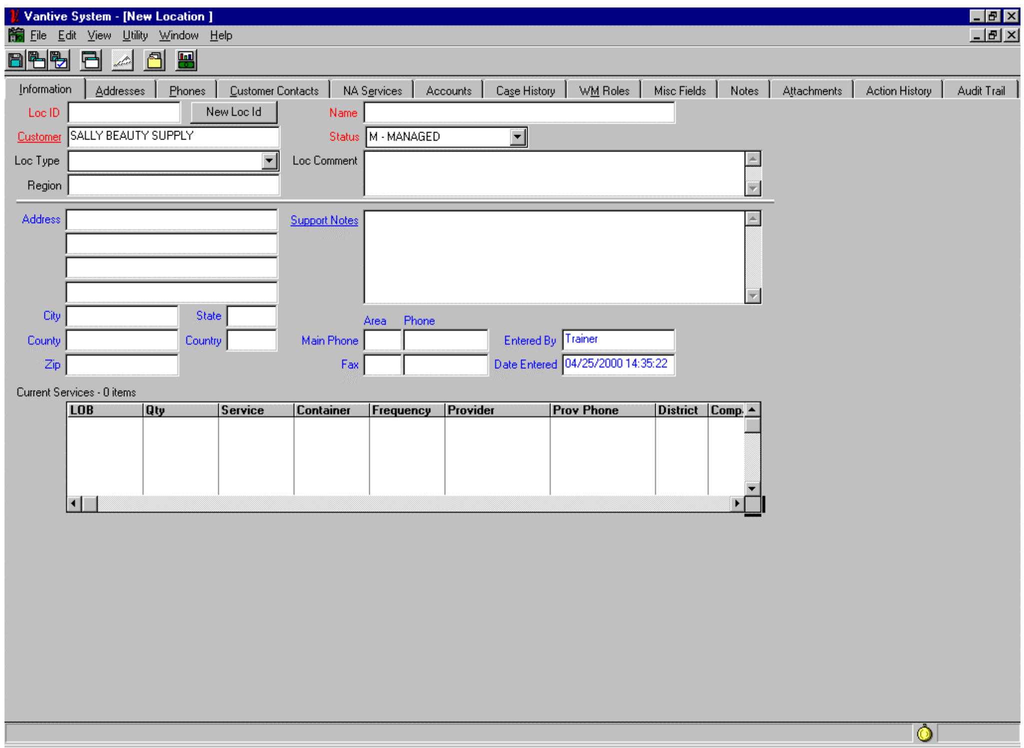
1. Click on the **File** menu.
2. Click on the **New** option.
3. Click on the **Location** option.
4. Click on the **Location** option to display a new, blank *Location* screen with the *Information* tab visible.



Location Screen, Information Tab

Enter Customer Name

1. Click on the Customer hyperlink to display the *Customer Locator* window.
2. Enter the customer name as the search criteria.
3. Click on the **Search** button (or press the **Return** key) to display the customer information in the summary window.
4. Highlight the correct customer.
5. Click on **Use** button (or press the **Enter** key) to select this customer and return to the *Location* window with the customer name filled in.

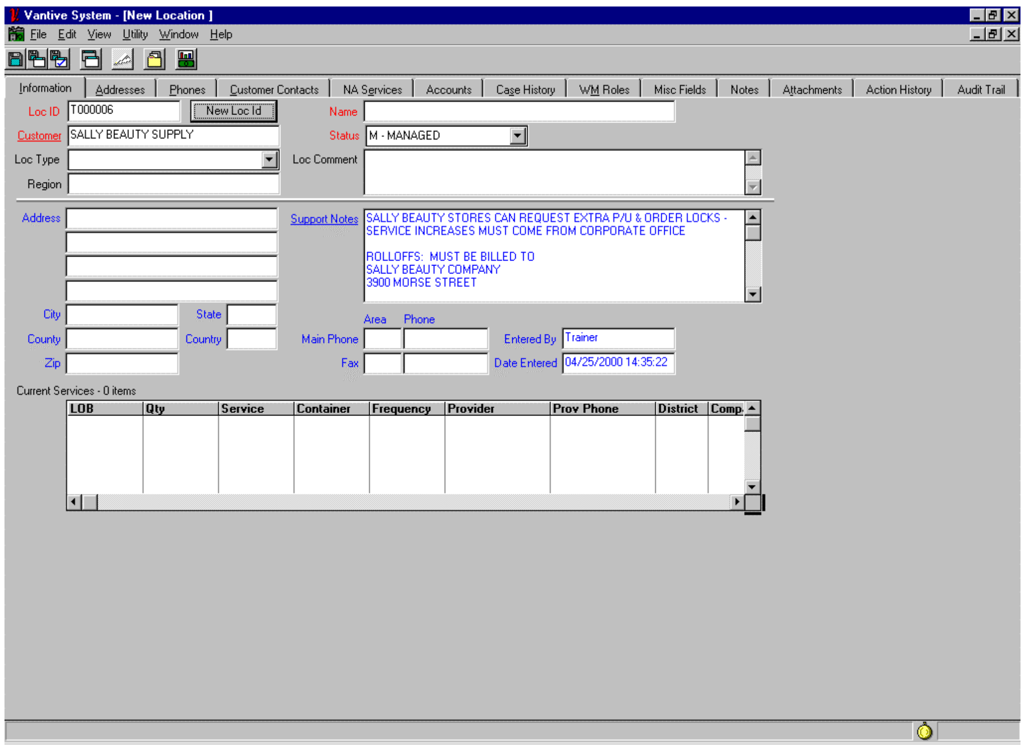


Location Screen with Location Name, Customer Name, and Customer Information

Create New Location ID and Enter Location Name

The location ID usually is given to us by the customer because it is the way they refer to their stores or sites. It is very important to know how a particular customer has its location IDs set up. If most of the location IDs are four-digit numbers and some are two-digit or three-digit numbers, the shorter location IDs must be given leading zeros to make them as long as the longest location ID.

1. If the LOC ID field is not provided by the customer, click on the **New Loc ID** button to generate and display a new location ID.



Location Screen with New Location ID

2. Press the **Tab** key to move to the NAME field.
3. Type in the name of location. This is usually the customer name, but sometimes it is the location name.

Finish General Location Data

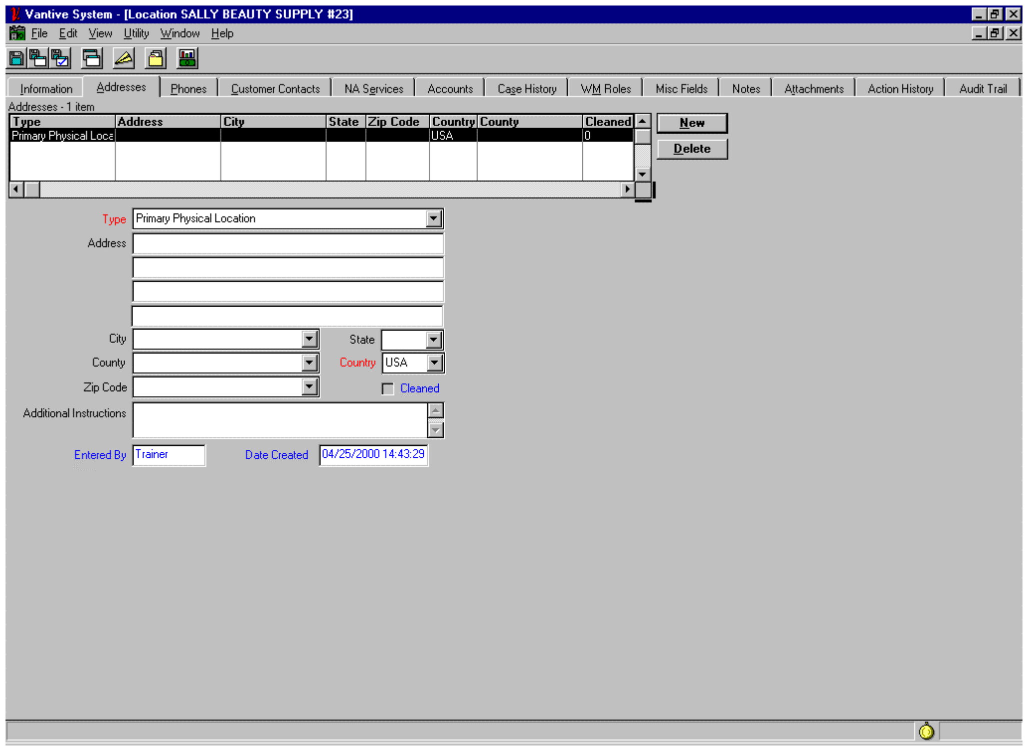
1. Select the appropriate location status. Generally, it will be "managed."

Status	Meaning
Managed	A location that is being billed or serviced by NASC
Non-managed	A location not serviced or billed by NASC
Closed	Location has been closed (used with existing locations)
Transferred	Location transferred to another major account customer (used with existing locations)
Logically deleted	Location set to "deleted" and will be deleted during the next database cleanup on the next weekend (used with existing locations)

2. Click on the **Save** button to save the current information.

Enter Address Information

1. Click on the *Address* tab to display the entry fields for the customer's address.

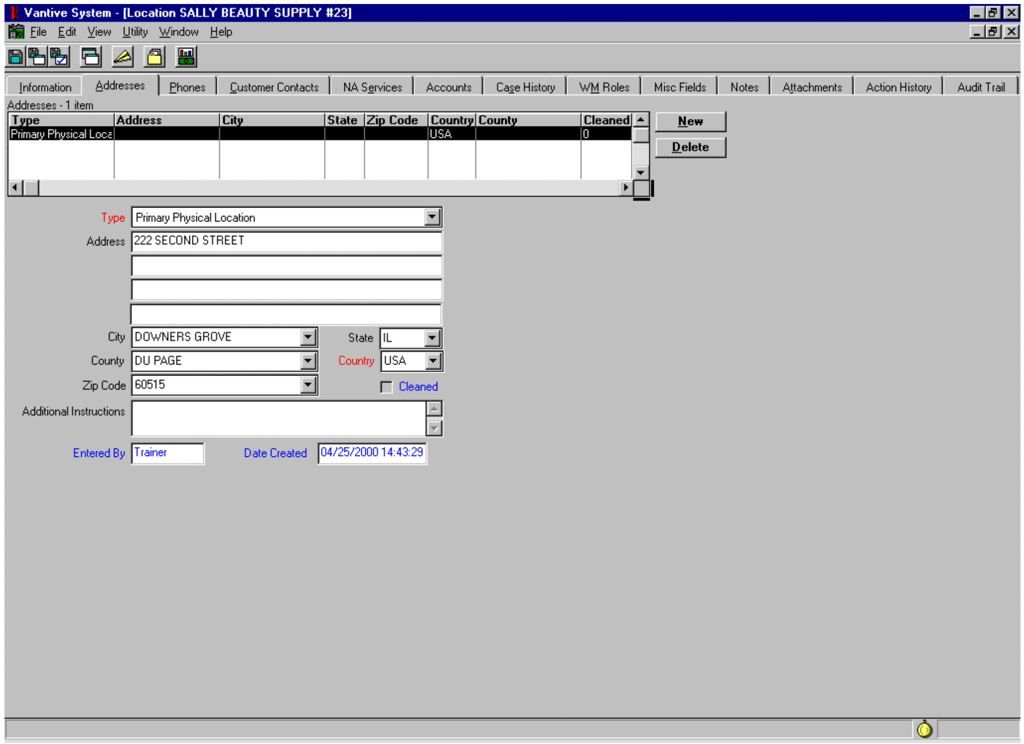


Address Tab of Location Screen

If you don't know the correct zip code, use the first one in the list. You can always change it later.

2. In the ADDRESS fields, type in the street address using as many lines as needed.
3. Press the **Tab** key to move to the STATE field.
4. Type in the state's two-letter code (or select from the drop-down list).
5. Press the **Tab** key to move the cursor to the CITY field.
6. The CITY drop-down list now includes only cities from the specified state.Select the city name from the drop-down list.
7. Press the **Tab** key enough times to move the cursor to the ZIPCODE field.
8. The ZIPCODE drop-down list now includes only zip codes for the specified city.
9. Select the zip code from the drop-down list.

☑ The completed *Address* tab will look like the following figure.



Completed Address Tab of Location Screen

NOTE: It is important to complete all fields for the address, except for county, which will be filled in by the system automatically. If a field is not completed, especially the zip code, the system will NOT copy the address into any field that is linked to this location.

Save Record and Close Window

Depending on how you got this screen, do one of the following:

- If you got to this screen while setting up an account, click on the **Save Record and Close Window** icon ( ) on the toolbar.

  The system saves the record and returns you to the window you were working in when you started this procedure.

- If you got to this screen because you were initially setting up a new location, click on the **Save Record** icon ( ) on the toolbar.

  The system saves the record.

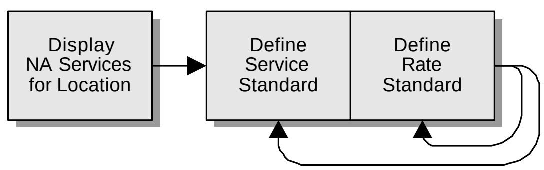
Procedure

Set Up Standards for a Location

Situation

You have received a phone call or memo from an existing customer about the services and rates for a location. The location record general information has already been set up ***but location standards have not been set up***. You now are ready to set up the location standards.

Procedure Overview

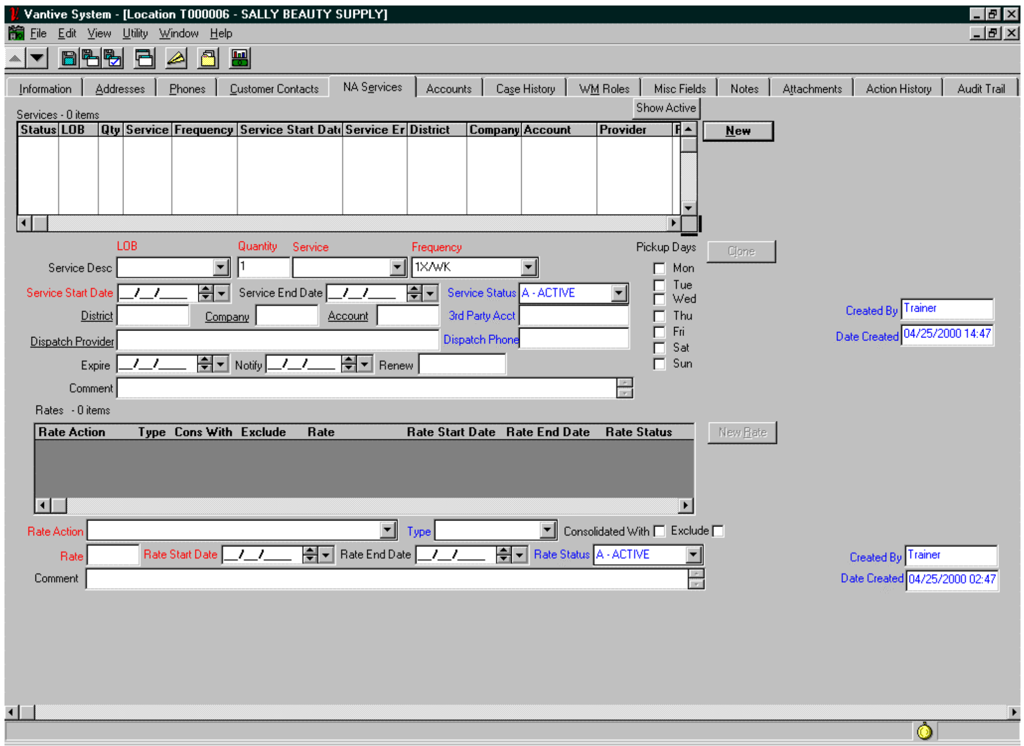


Procedure Overview

Display the NA Services Screen for the Location

You are presently looking at the *Information* or *Address* tab of the *Location* screen for the location.

1. Click on the NA Services tab to display it.



Blank NA Services Tab

Define Service Standards and Rate Standards

1. Click in the LOB (LINE OF BUSINESS) field to position the cursor there.
2. Select the correct line of business from the drop-down list. Then press the **Tab** key.

   Shortcut: Type the first character of the value you want to make the system jump to the first list item starting with that letter. Type the first character again to move to the next item starting with that letter. Repeat typing the first character until you get to the list item you want. Then press Enter to insert the list item into the field.

The most commonly used lines of business are:

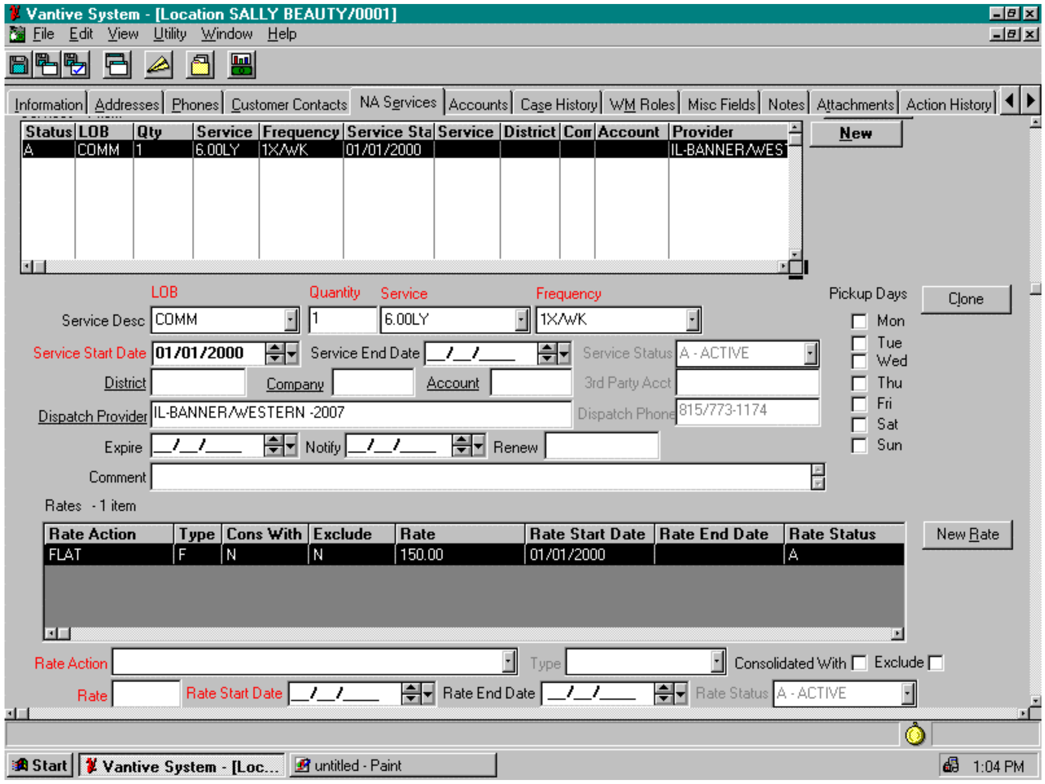
- **COMMercial – used for commercial trash containers that are 10 loose yards or smaller**
- **RECycle – used for any size loose or compacted yard container that handles recyclables**
- **ROLLOFF – used for loose or compacted yard trash container that is 15 yards or larger.**

See the appendix for additional lines of business.

3. In the QUANTITY field, type in the number of containers. Then press the **Tab** key.
4. For the SERVICE field, select the service from the drop-down list. Then press the **Tab** key.
5. For the FREQUENCY field, select the frequency of service from the drop-down list. Then, press the **Tab** key to move to the SERVICE START DATE field.
6. In the SERVICE START DATE field, type in the date that this service will become authorized. Then press the **Tab** key to move to the DISTRICT field. The system automatically fills in the STATUS field.
7. Fill in the DISTRICT, COMPANY, and ACCOUNT fields if you know the proper values. Then, press the **Tab** key to move to the DISPATCH PROVIDER field.
8. Fill in the dispatch provider (the service provider actually providing the service). Then, press the **Tab** key to move to the (DISPATCH PROVIDER) PHONE fields.
9. The system should automatically fill in the phone number for the dispatch provider based on the provider selected. Then, press the **Tab** key to move to the EXPIRE field.
10. For third-party only, fill in the following fields if you have the information.
    - The EXPIRE field holds the date when a third-party contract will expire. Fill it in, then press the **Tab** key.
    - The NOTIFY field holds the date when a third-party provider should be notified that a contract is about to expire. Fill it in, then press the **Tab** key to move to the RENEW field.
    - The RENEW field holds the length of the contract; e.g., 1 year, 3 years, etc. Fill this in, then press the **Tab** key.

11. In the COMMENTS field, type in any service comments.

☑ When a service has been defined, the screen should look like the one below.



NA Services Tab with One Service Standard Defined

12. Press the **Tab** key to move to the RATE ACTION field to position the cursor there.

13. Select the rate action name from the drop-down list (see the appendix for the different rate actions and their definitions). Then press the **Tab** key. Then the system will fill in the TYPE field.

✂ Shortcut: Type the first character of the value you want to make the system jump to the first list item starting with that letter. Type the first character again to move to the next item starting with that letter. Repeat typing the first character until you get to the list item you want. Then press Enter to insert the list item into the field.

14. If the current rate standard should have management fees "rolled up" into it, place an X in the CONSOLIDATED WITH field. Then press the **Tab** key.

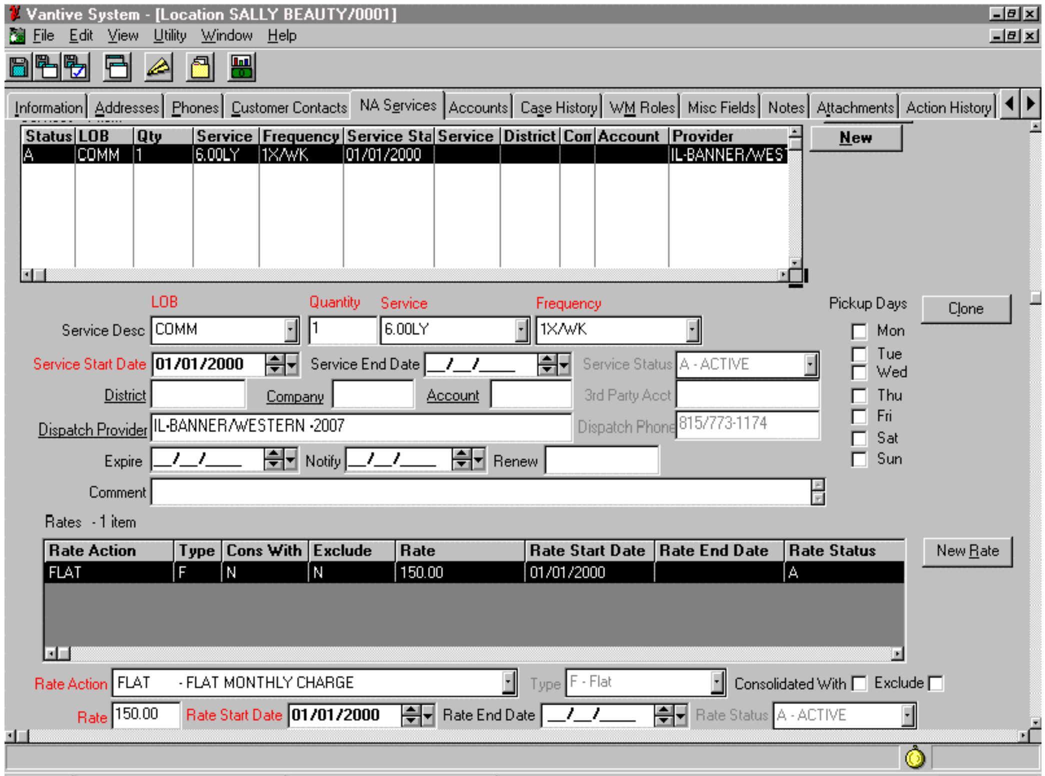
   - Management fees may be "rolled up" (added) into another rate standard so that only the other rate standard description prints on the invoice, but the dollar amount is the sum of the two. The rate standard into which the management fees are "rolled up" is the one with a check mark in the CONSOLIDATE WITH field.*

- Only a management fee can be consolidated. When the provider bills the account as two line items but the standard is entered as one line item on the invoice, a note should be entered by the NBR in the CUSTOMER COMMENTS field explaining this.

15. If the rate standard should be excluded from the invoice rate standard, place an X in the EXCLUDE FROM STANDARDS field.
    - Some rate actions are automatically set up to be excluded, so you don't have to exclude it yourself.
16. In the RATE field, type in the rate for this service. Then press the **Tab** key.
    - One or more rate standards may be defined for each service standard. The rate standard (s) for a service standard become visible on the *Standards* screen when the service standard is highlighted. All authorized rate standards should be defined for a service standard, even if the rate standard is not always included on the invoice (e.g., the rate standard for an extra pickup). Such rate standards should be defined but excluded from the invoice rate standard. In this way, the rate standard will be available on the *Invoice Review* screen.
17. In the RATE START DATE field, type in the rate start date in *mm/dd/yyyy* format. Then press the **Tab** key. The system will automatically fill in the RATE STATUS field.
    - The rate start date must be greater than or equal to the service start date.
18. If there are any rate comments, press the **Tab** key twice to move to the RATE COMMENTS field, and type in the rate comments.

☑ The screen should look like the one on the next page.

* If the invoice bypasses the compliance process, the management fee must be consolidated manually.



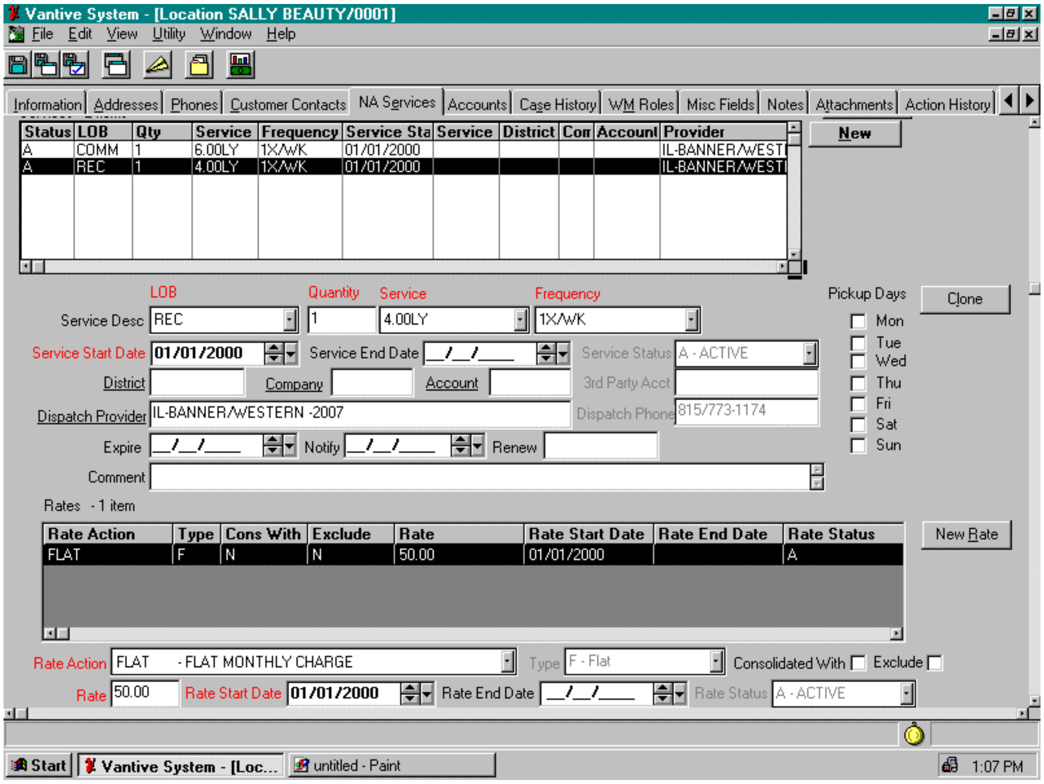
NA Services Tab with One Completed Rate Standard

19. Click on the **Save** button on the toolbar to save the present state of the standards.

If there are more rate standards for this service standard, click on the **New Rate** button to the right of the Rate Standards area, then **RETURN** to step 12 and **REPEAT** all the steps to this point for the new rate standard.

If there are more service standards, click on the **New** button to the right of the Service Standards area, then **RETURN** to *Define Service Standard* on page 10-13 and **REPEAT** all the steps to this point for the new service.

☑ When all the services have been defined, the screen should look like the one on the next page.



NA Services Tab with Completed Service Standards

Procedure Update Location Standards

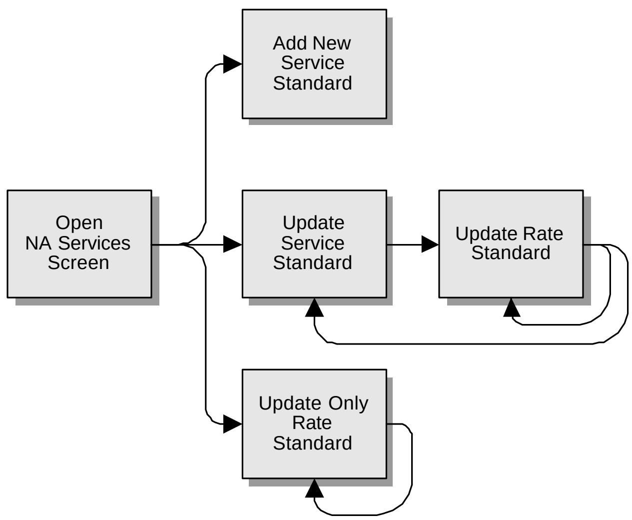
Situation

You can get to this process in several ways:

- You have received a call to change a service or add a new service to an existing location.

You are ready to update the service standard(s) and/or rate standard(s).

Procedure Overview



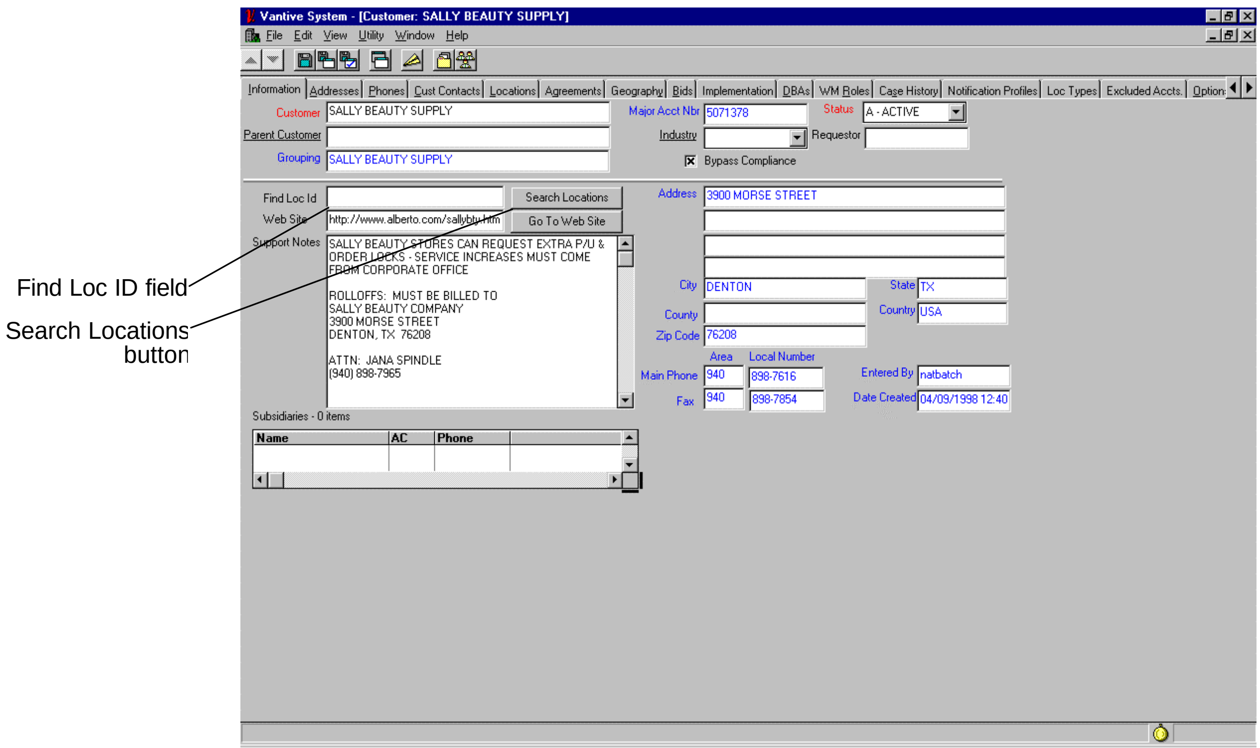
Procedure Overview

Open the NA Services Screen

1. Click on the **File** option on the menubar.
2. Click on the **Open** option.
3. Click on the **Customer** option.
4. Click on the **Customer** option to open the *Customer Locator* screen.
5. Enter the following search criteria.

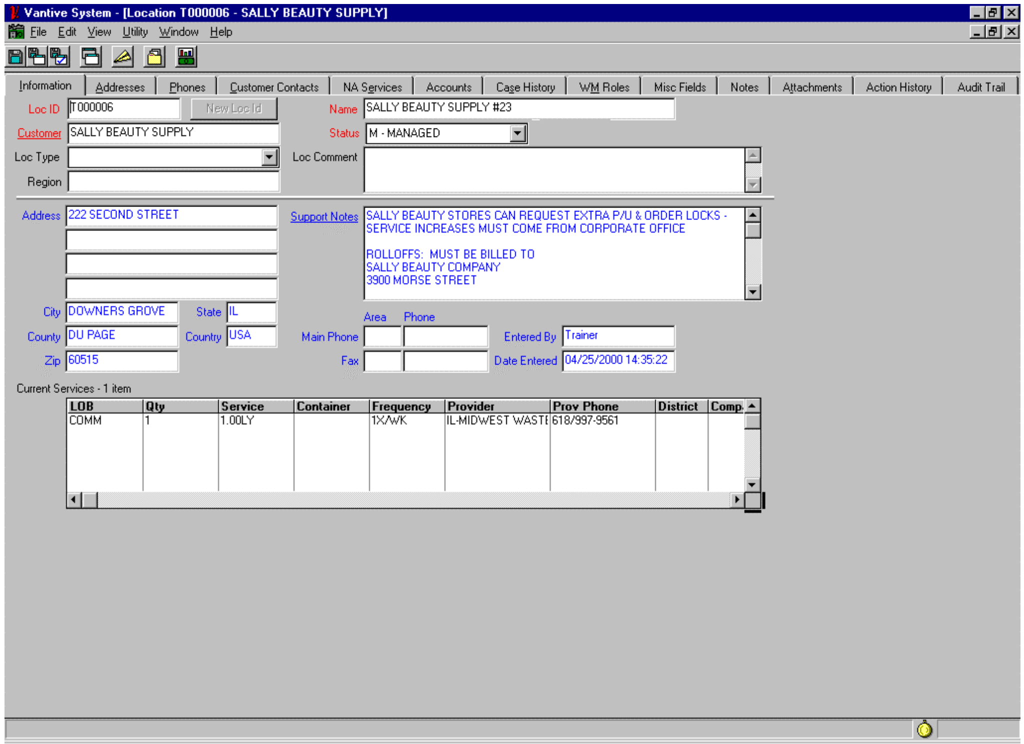
For Field	Matching Operator	Enter Search Criteria
Customer	Like	Customer name

6. Press the **Enter** key (or click on the **Search** button) to display the customer's information in the summary area.
7. If there is more than one matching record, highlight the desired customer information line.
8. Press the **Enter** key to open the *Customer* screen.



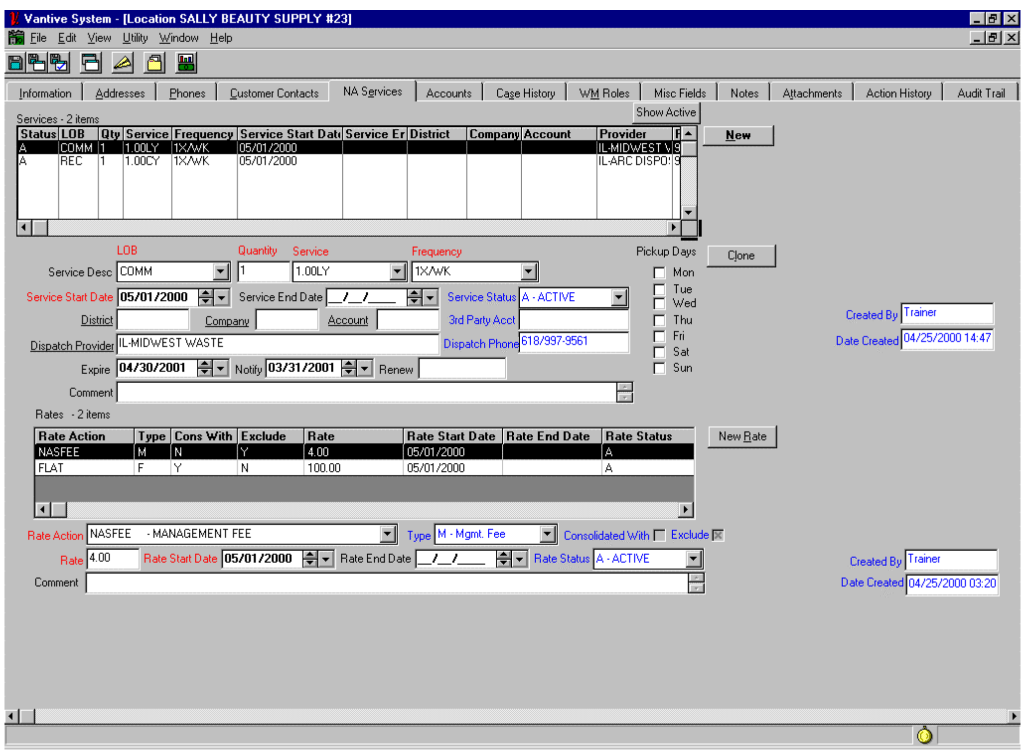
Customer Screen, Information Tab

9. In the FIND LOC ID field, enter the location number of the desired location.
10. Click on the **Search Locations** button to open the *Information* tab of the *Location* screen.



Location Screen, Information Tab

11. Click on the **NA Services** tab to display the *NA Services* tab.



Location Screen, NA Services Tab

All currently active service standards for a location should be defined.

Management fees should be defined as a service standard for a location.

Taxes should be defined as a service standard for a location.

Update Service Standard and Rate Standard

When a service standard is no longer in effect, it is not deleted but is inactivated by giving it a SERVICE END date. At the same time, all rates linked to the service will get the same end date.

If an account is cancelled, all SERVICE END DATES and RATE END DATES will be automatically assigned the current date.

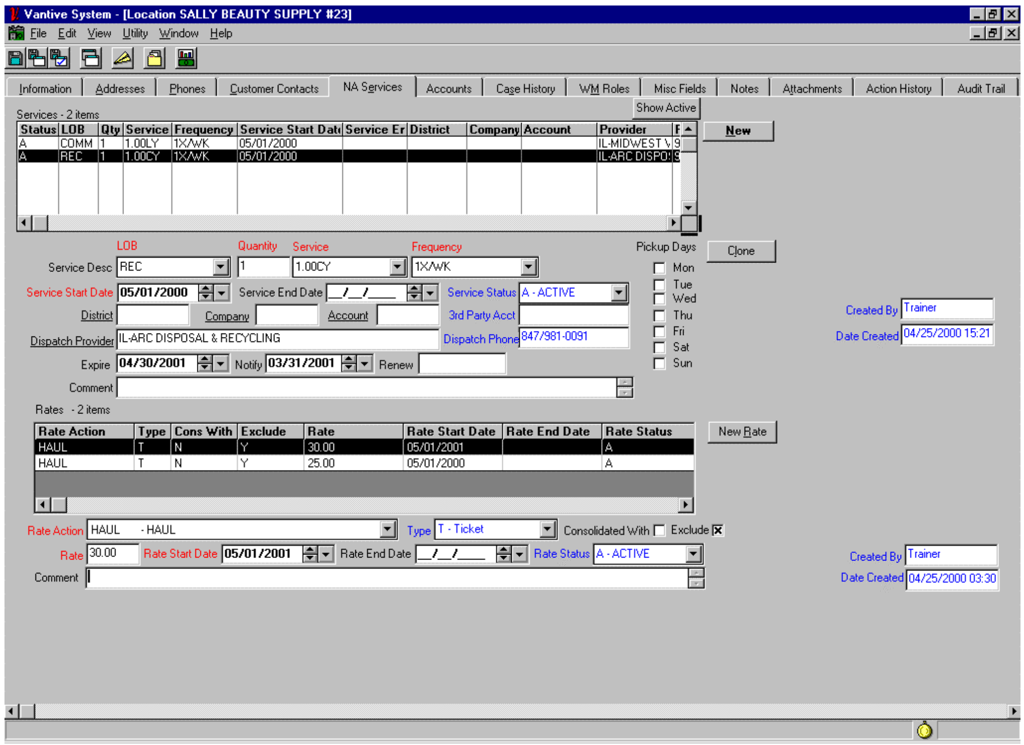
1. Click on the service standard to be updated.
2. Update the service standard as appropriate.

If …	Then …
Service is to be ended	1. Click in the SERVICE END DATE field. 2. Type in the date the service ends. 3. Click on the **Save** button on the toolbar to save the present state of the standards.
Service action is to be changed	1. Click in the SERVICE END DATE field. 2. Type in the date the service ends. 3. Click on the **Save** button on the toolbar to save the present state of the standards. 4. Click on the Clone button to make a copy of the service. 5. **JUMP** to *Define Service Standard* on page 10-13 and complete the rest of the steps of that procedure. Then **RETURN** to this point and **PROCEED**.

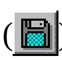
If there are more service standards to update, **RETURN** to step 1 and **REPEAT** all the steps of this procedure.

Update Only Rate Standard for a Service Standard

You are looking at the *NA Services* tab of the *Location* screen.



NA Services Tab with Existing Standards

1. Click on the service standard being updated to display its rate standards.
2. Click on the rate standard to update (scroll the Rate Standards list as necessary).
3. In the RATE END DATE field, enter the date that the rate standard should end.
4. Click on the **Save Record** icon () on the toolbar
5. Click on the **New Rate** button next to the Rate Standards list to create a new, blank rate standard.

> **JUMP** to step 12 on page 10-14 and complete the steps to define the new rate standard. Then, **RETURN** to this point and **PROCEED**.

6. Click on the **Save** button on the toolbar to save the present state of the standards.

If there are more rate standards to update for this service standard, click on the rate standard to be updated, and **RETURN** to step 1 and **REPEAT** all the steps.