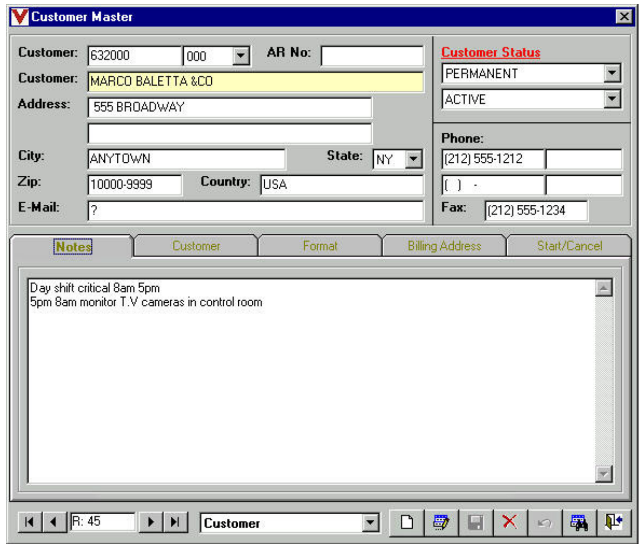
The Customer Master represents the client of the user company for which a schedule will be created. This customer is to be billed for the services provided by your company. The Customer Master is the highest level in the Vision™ hierarchy of customer levels (Customer, Location, Position and Tour).

Customer Master File

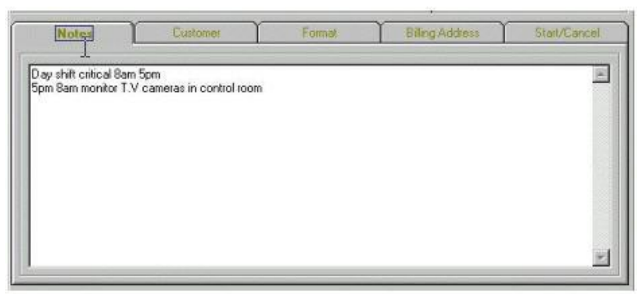
Select **Customer Master** from the Masters drop-down or Click the **Customer** button.

- The top half contains static **Customer** information.
- The **Customer Status** section is used when inactivating/ re-activating terminated Customers.
- Any Customer designated **Permanent** will carry from the last week in your list of weeks into a new week when created. Any other status will NOT carry into a new week when created.
- When changing a Customer status to **INACTIVE**, the system will require an **End Date** (on the Start/Cancel tab).

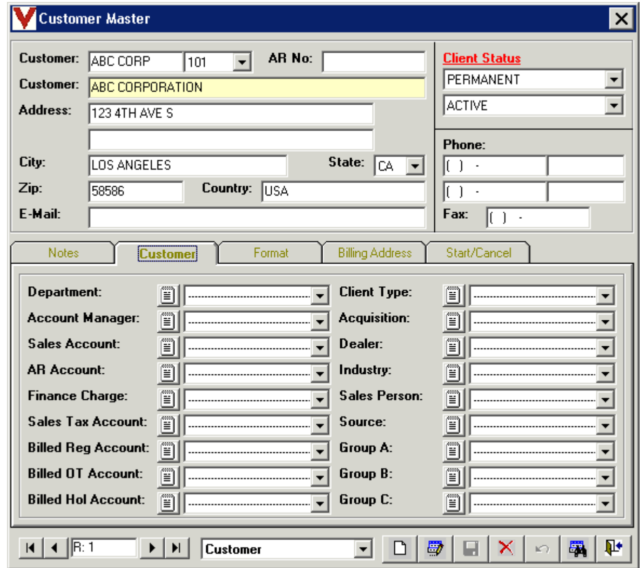


Notes Tab

Notes tab allows entry of an unlimited amount of text pertaining to the specific Customer for internal use only. Text can be entered manually from the keyboard or copied and pasted from Word documents.



Customer Tab



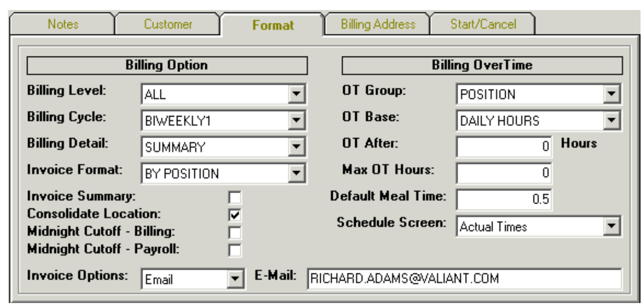
Customer tab is where additional customer data can be entered through user-definable look-up fields for grouping and sorting reports and linking purposes for Payroll, General Ledger and Accounts Receivable.

Department establishes a relationship between Employees and Customers. It provides the ability to:

- Set security permissions by groups of customers and/or employees for users
- Establish additional sorting (filtering) during scheduling functions from the Availability List
- Allow job costing and analysis by department
- Export the employee/customer relationship to payroll and other applications external to Vision.

Note: *Not all user-defined fields are reported on.*

Format Tab



Format tab is where Billing information is entered for the Customer including Billing Options which determine the billing cycle, details and format for all invoices created for this Customer and its locations.

Billing Level designates which processing level invoices will be generated for this Customer. Normally, invoices will be generated at the Division level. However, where Customer invoicing is required across multiple Divisions, Billing Level 1 would be selected.

Billing Cycle determines the user-defined billing period such as weekly, biweekly1, monthly, etc.

Billing Detail combined with the **Invoice Format** field provides seven different combinations to group and sort the information to be printed on the invoice.

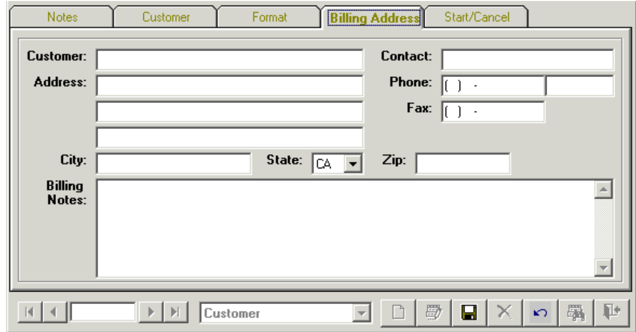
Midnight Cutoff check boxes may be applied separately to payroll and billing. They determine if the hours scheduled should be Paid and/or Billed through the end of tours on the last day of the Payroll and Billing period cycle or if they are to cut off at midnight with the remaining hours added onto the next period cycle.

Billing Overtime determines the rules for the calculation of Billing Overtime for the Customer. **Schedule Screen** determines, on a Customer-by-Customer basis, the display of **Actual** or **Clock** (scheduled) times in the employee schedule.

Note*: Billing information and options are established at the Customer Master level. However, invoices are generated by location at the Location Master level but can be consolidated by Customer using the* ***Invoice Summary*** *or* ***Consolidate Location*** *options.*

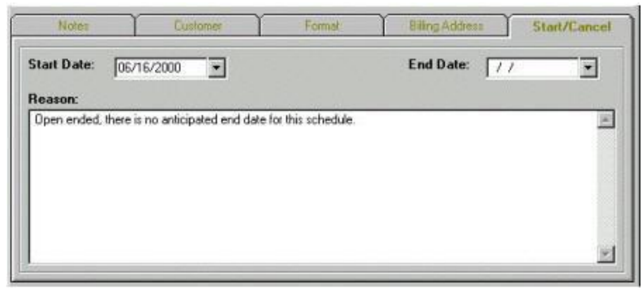
Billing Address Tab

Billing Address Tab displays the Customer mailing address. If there is no entry, the address will default to the Customer Master address for billing purposes. If the Billing address differs from the Customer address, the billing address information would be entered here in the Billing Address Tab.



Start/Cancel Tab

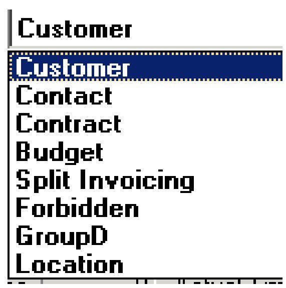
Start/Cancel Tab sets up the date parameters for the schedule. These dates are normally used for the contract start and end dates and will automatically display schedules between the stated period. Unless otherwise specified, **Start Date** will default to the date the *Customer Master* was created. As contracts can be open-ended the **End Date** can be left blank if desired.



***Note**: If an **End Date** is entered, the schedule will <u>NOT</u> copy forward to the new week when the **End Date** is reached.*

Additional Employee Information

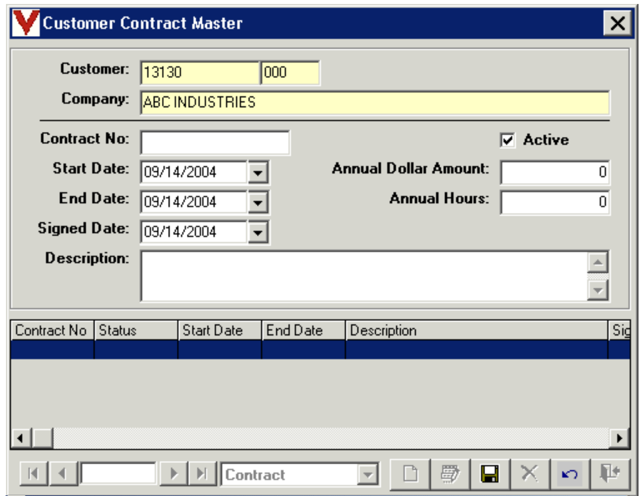
The drop-down list at the bottom of the screen shows additional items of which 5 are used for data entry with the Customer Master. Each Master is described below.



Customer Contact Master

Contact Master option allows for data entry of Customer contact information.

Customer Contract Master



Customer Contract Master allows entry of specific contract information including multiple contract entries if desired for this Customer. Contract information entered does not affect the schedule in any way.

***Note**: On this Master, the **End Date** is required and cannot be left blank. It is suggested you specify 20 years out or the schedule will <u>NOT</u> copy forward to the new week when the **End Date** is reached.*

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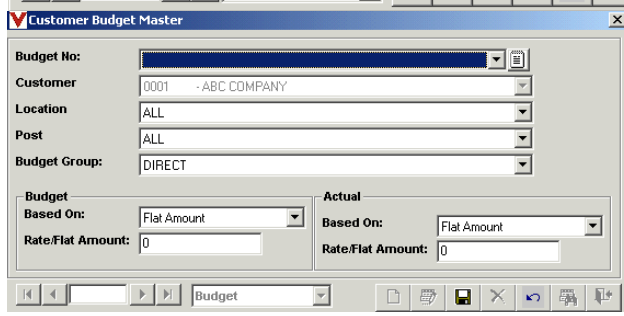
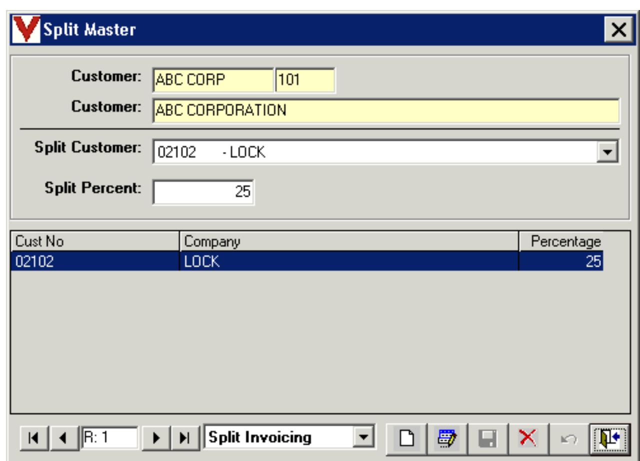
Budget Master



This function provides a means of applying default expense estimates for specified categories of expenses for customer budget records. Individual expense items are then assigned to a system-defined **Budget Group** for reporting purposes (Tools>Reports>Management>Customer Budget Report).

When the Customer Budget Report is run, all budgeted and actual expense items are reported on by Budget Group for each Customer.

Split Invoicing Master



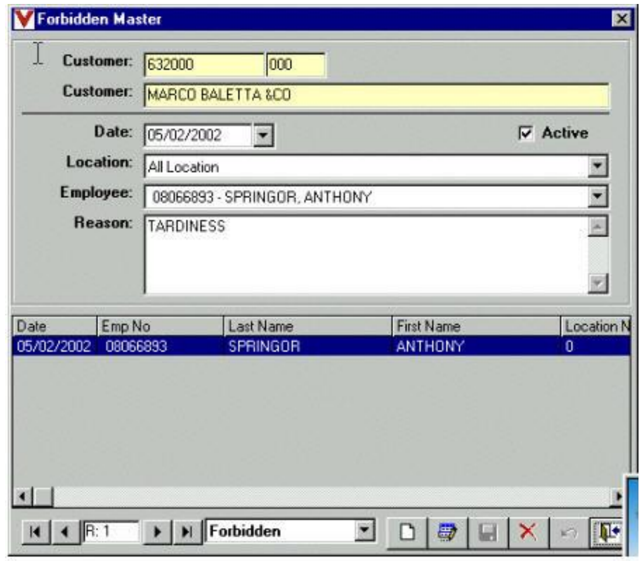
Split Invoicing Master allows invoicing to be split among one or more Customers from the main Customer (each Customer must have a **Customer Master**). Each Split Customer will receive a portion of the invoice based on the **Split Percent** desired. The Main Customer's invoice receives the balance (the total percentage may not exceed 100%). A separate invoice will print for each with the specified breakdown of the total invoice amount multiplied by the designated percentage(s).

Forbidden Master

Forbidden Master is used to prevent the assignment of an employee to a Customer, Location, or Post by request of the Customer and affects the availability list when assigning employees.

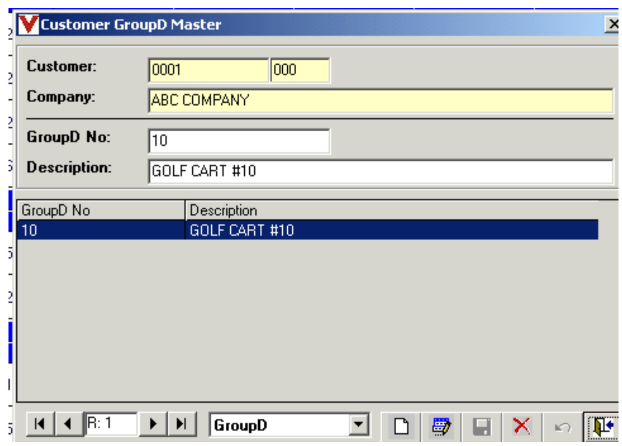
Entries in the **Forbidden Master** in the Customer Master file will also appear in the **Forbidden Master** in the corresponding Employee Master file. When an employee is added to the forbidden list, that employee will not appear in the **Assign Employee Availability** List.

***Note**: There is no override to permit the assignment of an employee to the Customer or location designated as forbidden. However, authorized users can deselect the **Active** status of this record which will allow the employee to appear in the **Assign Employee Availability** List.*



Group D Master

Group D Master is user-defined. It allows for multiple records to be assigned to the Customer Master.



Customer Default Master

Entries in this master will be automatically carried over to any NEW records created using the **Customer Master**.

Note: Default settings created or revised here in the **Customer Default Master** will NOT affect existing **Customer Master** records that were created prior to the default settings being entered.