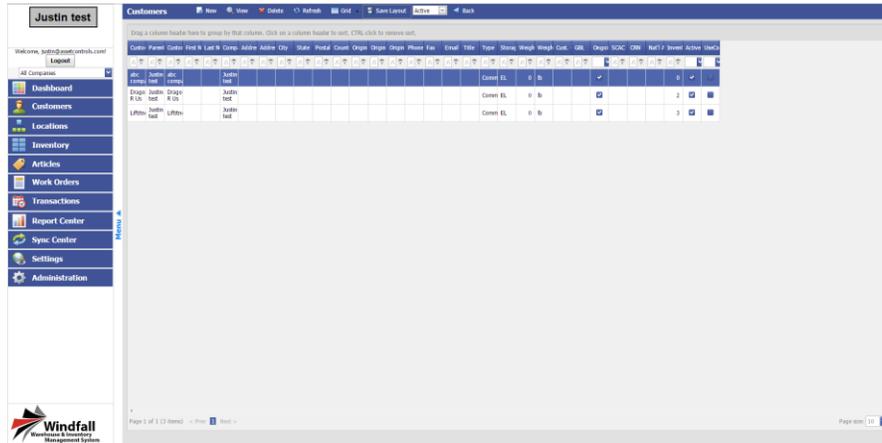
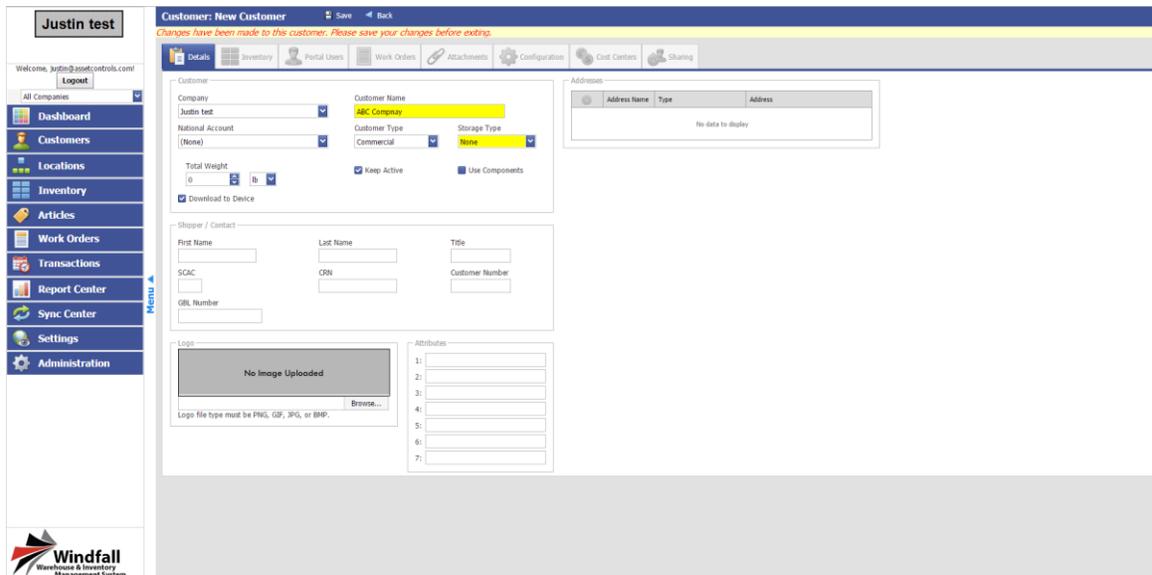


Creating Customers

- Customers must first be created before inventory can be brought into the warehouse.
- To create a customer, click on the Customers button.

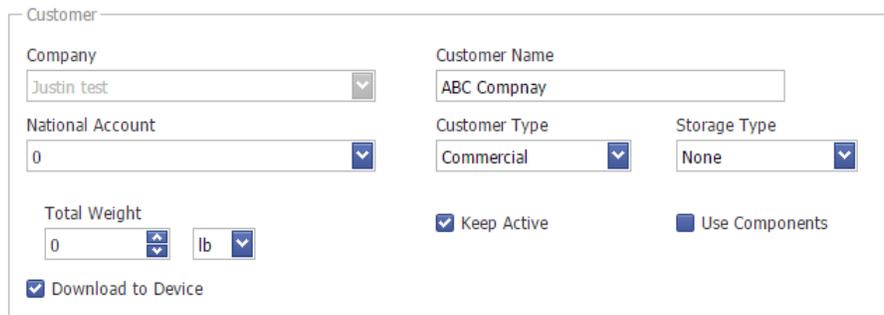


- The Customer List screen will appear. Click the New button to add a new customer.
- Enter in the Customer Name.
- Select the Customer Type as Commercial.
- Select a Storage Type from the dropdown box.
 - These are the only three required fields.
- Click Save when the fields are yellow and you have entered all information for that customer



Details and Company Information

- **Company:**
 - This is your company name.
- **Customer Name:**
 - Field where the customer name will be entered.
- **National Account:**
 - Used to group customers together under one account.
- **Customer Type:**
 - Dropdown where Commercial will be selected.
- **Storage Type:**
 - Select the storage type for the customer. Ex: Hospital Project, Hotel Project
- **Total Weight:**
 - The total weight of the entire project.
- **Keep Active:**
 - New customers will default to this option. This option will keep the customer active after scanning out all inventory and closing all active work orders. Windfall will archive customers without inventory or work orders.
- **Use Components:**
 - This will allow customers to utilize components. Ex: Record storage files
- **Download to Device:**
 - If this box is checked the customer will download to the Windfall Mobile Pro Application. If it is not checked it will not appear on the IOS device.



Customer

Company Justin test	Customer Name ABC Compnay	
National Account 0	Customer Type Commercial	Storage Type None
Total Weight 0 lb	<input checked="" type="checkbox"/> Keep Active	<input type="checkbox"/> Use Components
<input checked="" type="checkbox"/> Download to Device		

Shipper/Contact

- **Contact First Name/Last Name:**
 - These are the fields for the contact name of your customer.
- **Title:**
 - Title of the customer. (Mr., Mrs., Dr.)
- **SCAC\CRN:**
 - This is specific to one Van Line.
- **Customer Number:**
 - This is mainly used in the record storage process.
- **GBL Number:**
 - This is to retain the government bill of lading number.
- **Browse:**
 - Click the browse button to search for an image to display for the customer.

Shipper / Contact

First Name <input type="text"/>	Last Name <input type="text"/>	Title <input type="text"/>
SCAC <input type="text"/>	CRN <input type="text"/>	Customer Number <input type="text"/>
GBL Number <input type="text"/>		

- **Logo:**
 - This is used to display the customer’s logo when they log on to view their inventory.
- **Attributes:**
 - This is where you would set your Attribute labels for Articles

<p>Logo</p> <div style="border: 1px solid gray; padding: 5px; text-align: center;"> <p>No Image Uploaded</p> <p><input type="text"/> <input type="button" value="Browse..."/></p> <p><small>Logo file type must be PNG, GIF, JPG, or BMP.</small></p> </div>	<p>Attributes</p> <p>1: <input type="text"/></p> <p>2: <input type="text"/></p> <p>3: <input type="text"/></p> <p>4: <input type="text"/></p> <p>5: <input type="text"/></p> <p>6: <input type="text"/></p> <p>7: <input type="text"/></p>
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Addresses

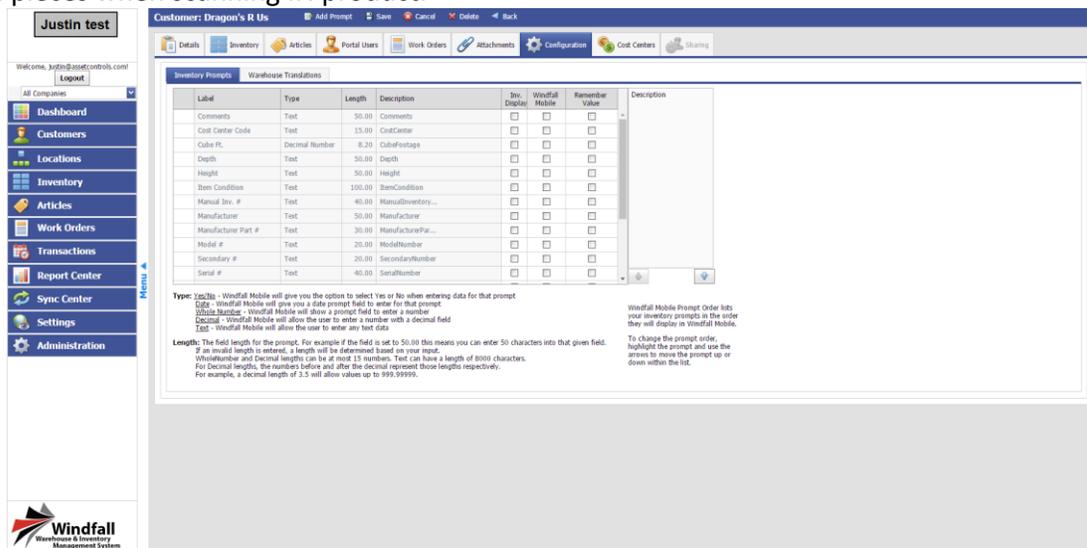
- **Other:**
 - This is used for additional addresses the customer uses.
- **Business:**
 - This is the business address of the customer.
- **Destination:**
 - This address populates the destination address when using the HHG process.
- **Home:**
 - This address is the Home address of the customer.
- **Origin:**
 - This address populates the origin address when you are using the HHG process.
- **Shipping:**
 - This address populates the address for shipping purposes for the commercial process.

Address Type:	Company Name:	First Name:	Last Name:	
<input type="text" value="Other"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text" value="Business"/>	Address:			
<input type="text" value="Destination"/>	<input type="text"/>			
<input type="text" value="Home"/>	<input type="text"/>			
<input type="text" value="Origin"/>	City:	State:	Postal Code:	Country:
<input type="text" value="Shipping"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Other"/>	Phone:	Fax:	Email:	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	

CONFIGURATION

Adding Scanner Prompts

- To collect additional data about items when using articles or to collect data about items without using articles, scanner prompts will need to be set up.
- Click on the Configuration Tab within the customer.
- Listed on the screen are default scanner prompts. Check the prompts of the fields that will be collected.
- Check the box in the Inv. Display column to be able to view the data within Windfall.
- Check the box in the Windfall Mobile column to be able to view the prompts in the Windfall Mobile app.
- Check the box in the Remember Value column for Windfall mobile to remember the information entered for all pieces when scanning IN product.



Adding Additional Scanner Prompts

- To create additional scanner prompts click the Add Prompt button.
- Type in the name of the prompt.
- Select the Type. Refer to the descriptions of each type to choose the correct type.
- Enter the Description.
- Check the options for Inv. Display, Windfall Mobile, and Remember Value if needed.
- Click Save.

Type: Yes/No - Windfall Mobile will give you the option to select Yes or No when entering data for that prompt
Date - Windfall Mobile will give you a date prompt field to enter for that prompt
Whole Number - Windfall Mobile will show a prompt field to enter a number
Decimal - Windfall Mobile will allow the user to enter a number with a decimal field
Text - Windfall Mobile will allow the user to enter any text data

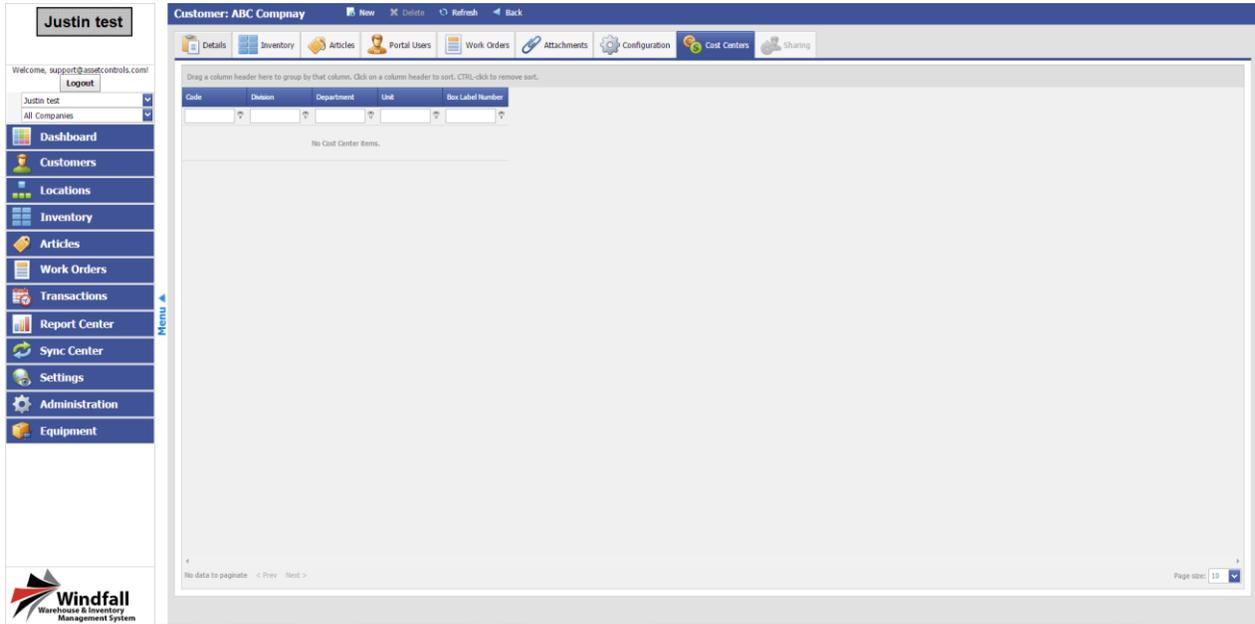
Length: The field length for the prompt. For example if the field is set to 50.00 this means you can enter 50 characters into that given field. If an invalid length is entered, a length will be determined based on your input. WholeNumber and Decimal lengths can be at most 15 numbers. Text can have a length of 8000 characters. For Decimal lengths, the numbers before and after the decimal represent those lengths respectively. For example, a decimal length of 3.5 will allow values up to 999.99999.

Windfall Mobile Prompt Order lists your inventory prompts in the order they will display in Windfall Mobile.

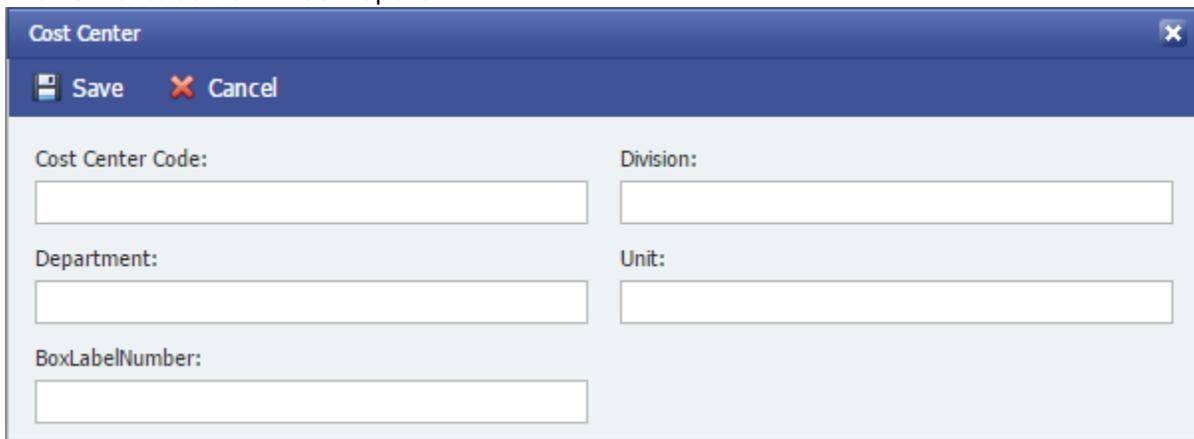
To change the prompt order, highlight the prompt and use the arrows to move the prompt up or down within the list.

COST CENTERS

- Click on the Cost Center Tab.



- The new Cost Center window opens.



The screenshot shows the 'Cost Center' window with the following fields:

- Cost Center Code:
- Division:
- Department:
- Unit:
- BoxLabelNumber:

The window also has a 'Save' button and a 'Cancel' button.

- Enter in the necessary information and click save.