Adding A Customer to WeighNZ

Account Applications will be returned to office@greencycle.co.nz

Use the Accounts / Billing contact information for Weigh entry.

Move Application Form to Account Application folder in office email. Add additional contacts to Capsule when the customer account is synced with Capsule.

Add Customer

Select Customer (people symbol)



Select New (plus icon top of the left list)

Customer Details ('i' icon):

- Name Address, Suburb, Postcode, City, Phone Contact, Email.
- Code and Alpha will self-populate.

Notes: (optional)

- Use if special customer requirements e.g. PO Required or "On Stop Credit"
- Notify Notes on: This is when note will appear, Entry, ExitSelect 'Entry'.

Save (use Save on far left of window to keep customer record on screen)

Drag a column h	eader here to group by that column		1	Code:	Alpha:
* INV Period	Name	Code		Address:	
2	Click here to define a filte	r			
Weekly	ABOVE GROUND LANDSCAPING LIMITE	ABOVGROUND			
Weekly	ACCESS ONE SCAFFOLDING LIMITED	ACCONE		Suburb	
Weekly	ACG STRATHALLAN	ACGSTR		Suburb.	
Weekly	AJ MEYER - CREW CUT	AJMEYER		Postcode:	
Weekly	ALL TREES	ALLTRE	R	City:	
Weekly	AMARRAJ LAWN MOWING	AMALAW			
Weekly	AMENITIES AND INFRASTRUCTURE M	AIM	.88.	Phone:	
Weekly	ANANDZ MAINTENANCE	ANANZDZ		Mobile:	
Weekly	ANTS' MOWING SERVICES LIMITED	ANTSMOWING		Eave	
Weekly	ARB CRANES LTD	ARBCRANES		T dX.	
Weekly	ARBCON LIMITED	ARBCON		Contact:	
Weekly	ARBOR WORKS LTD	ARBORWORKX		Email:	
Weekly	ARBORIST 360 LIMITED	ARB360			
Weekly	ARBORIST AUCKLAND	ARBAKL		Docket Emails:	E
Weekly	AROUND THE HOUSE	ARTHHO		Web:	
Weekly	ASHLEY THOMAS DENNIS	ASHTHO		Notec	
Weekly	ASPLUNDH	ASPLUNDH		(Witch	
Monthly	AUCKLAND COUNCIL	AKCOUNCIL	品		
Weekly	AUCKLAND GARDEN SERVICES LIMITE	AGS			
Weekly	AUCKLAND HORT SERVICES LTD	AKHORT	ල		
Weekly	AUCKLAND LANDSCAPING SERVICES L	ALS			
Weekly	AUCKLAND PROPERTY CARE	AUPRCA			
Weekly	AUCKLAND TREE AND LANDSCAPE LTD	AKTREELAND			
Weekly	AUCKLAND TREE SERVICES	ATS		Notify Notes on:	None select
Weekly	Arena Living Mt Eden Gardens Limited	ARENAMTEDE		Custom	* Custom Groups Group Assignment
Weekly	BACK 2 FRONT LANDSCAPES LIMITED	BCK2F		Groups:	

Select Pricing (second icon down)

Price Book (use drop down)

- Teir 1 10% Discount for 7 day account
- Empty for 20th month account
- Other pricebooks will be instructed by Seb

Invoice Period

- Weekly payable in 7 days checked 7 day account
- Weekly payable in 7 days unchecked 20th month
- Monthly invoiced monthly payable 20th.
 For customers who want 1 invoice per month

Separated S&D

Not needed for Supply Only customers Used for separating transport & waste/product on invoice. Bins: collection charge and waste weight Product: transport charge and product volume Allows for pricing to be set for each component.

Default Xero Pricing

Not checked for most customers

Used for non standard billing period.

E.g Farmers Daughter monthly invoice payable in 7 days.

Save (use Save on far left of window to keep customer record on screen)



Select Customer Products (Starburst Icon)

- Right click on list
- Unselect all
- Select customer products
- Save

	Brad Cada	Product		100000				
-	FIOU COUE		-	Access				
7								
>	BENTON	BENTONITE P/TN						
	CESPIT	CLEAN CESSPIT						
	CLEANGW	CLEAN GREENWASTE P/TN						
	COMPOST	COMPOST PER M3						
	GAP65	GAP65 - LOADOUT						
	GARMIX	GARDEN MIX PER M3						
	GRNWASTE	GREENWASTE P/TN		V				
	GRNWASMIN	GREENWASTE P/TN MIN		V				
	GRDGW	GROUND GREENWASTE						
	SLUDGE	HYDROSLUDGE						
	MULCHM3	MULCH PER M3						
	N3SAND	N.3 SAND P/TN						
	FINES	SAP7 - LOADOUT						
	SEWER	SEWER						
	SOILCON	SOIL CONDITIONER P/TN						
	STORMW	STORMWATER						

Add Hauler

Select Hauler (network symbol)



Select New (plus icon top of the left list)

Hauler Details ('i' icon):

- Name
- Code and Alpha will self-populate.

Save (use Save on far left of window to keep hauler record on screen).

			la a		Code:	ASSPLUNG	Alpha:	ASSPLU
* Nan	ne	Alpha 🔺	Code					
8	Click he	re to define a	ı filter		Address:			
A1 I	LANDSCAPES	A1LAND	A1LAND		Suburb:			
A2Z	SERVICES LIMITED	A2ZSER	A2ZSER					
AAR	RONS CONTRACTING	AARONS	AARONS	2	Post Code:			
ABO	OVE GROUND LANDSCAPING	ABOVE	ABOVE		City:			
ACC	CESS ONE SCAFFOLDING LIMITED	ACCONE	ACCONE	<u>8</u> ,	Phone:			
AUC	CKLAND GARDEN SERVICES	AGS	AGS		Mobile			
ANT	IS HEDGES AND GARDENS	AHAGAR	AHAGAR		1-IODIC:			
AIM	1	AIM	AIM		Fax:			
AJ N	MEYER	AJMEYE	AJMEYER		Contact:			
AUC	CKLAND HORT SERVICES	AKHORT	AKHORT		Email:			
ALL	TREES	ALLTRE	ALLTRE		Dockot Emply			
DEL	.ETE	ALTRSE	ALTRSE		Docket Email:			
AMA	ARRAJ LAWN MOWING	AMALAW	AMALAW		Web:			
ANA	ANDZ MAINTENANCE	ANAMAI	ANAMAI		Status:	Active		
ANT	TS' MOWING SERVICES	ANMOSE	ANMOSE		Supplier:			0
ARB	BORIST360	ARB360	ARB360					
ARB	BORIST AUCKLAND	ARBAUC	ARBAUC		RFID Mode:		*	
TRE	EKING	ARBCON	ARBCON			Pre-Start Access		

Select Customers

These are the customers the hauler can haul for.

- Right Click
- Unselect all
- Search customers in search bar
- Select customers (themselves or multiple)

Save

= (× Enter text to s	earch	Find Clear				
1, 🔥	Access	Cus Alpha	Customer				
			Click here to define a filter				
	V	ASPLUNDH	ASPLUNDH				
		A1LANDSCPE	A1 LANDSCAPE SERVICES LTD				
LQ,		A1SURE	SURE SERVICES LTD				
		A2SELI	A2Z SERVICES LIMITED				
12 -		AARONS	AARONS CONTRACTING LIMITED				
		ABOVGROUND	ABOVE GROUND LANDSCAPING LIMITED				
8,4		ACCONE	ACCESS ONE SCAFFOLDING LIMITED				
		ACGSTR	ACG STRATHALLAN				
間。		AGS	AUCKLAND GARDEN SERVICES LIMITED				
		AIM	AMENITIES AND INFRASTRUCTURE MAINTENANCE SERVICES				
苣		AJMEYER	AJ MEYER - CREW CUT				
		AKCOUNCIL	AUCKLAND COUNCIL				
	m	AKUODT	ALICKLAND LIODT CEDVICEC LTD				

Add A Vehicle

• Select Vehicle

(this may be on same menu as hauler, customer etc)



Add vehicle

- Select New (plus icon top of the left list)
- ID Vehicle = enter vehicle registration number
- Id Configuration = type of vehicle from dropdown menu e.g. Truck 4 wheeler/trailer only
- Hauler = Company name from dropdown menu
- Save (use far left save button if adding multiple vehicles to keep vehicle maintenance on screen)

-Съ	+ ID Vehicle	▲ ID RFID	ID Name	D Configuration	Haul Code	Hauler	Tare WT Tare Date Tare Time	Tare Out		1 Diverse:	
-	V			Click here to a	efine a filter					ED R/FED:	
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5	8TRASH	F461940A	BTRASH	TRUCK 4WHEELER	TRSCTRL	TRASH CONTROL	6.20 14/03/2023 09:35:43	N.		TR Tare WT (T):	
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_	AL050	54C8890A	P2PEV1	TRUCK 4WHEELER	PIPEVI	PIPEVISION	12.96 13/04/2023 16:55:39	100 E		TR Target (T):	
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00	AWH337	AWH337	AWH337	TRUCK 4WHEELER	BACK2F	BACK2FRONT		8			
	AWK239	AWK239	AWKZ39	TRUCK 4WHEELER	ECOHICI	ECO FRENDLY	1.84 25/10/2022 20:18:32	100 N		TR Max Gross (T):	
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	DJT260-MS	DJT260-MS	DJT260-MS	TRUCK 4WHEELER	MULSUR	MULCH SUBSCRIPTION	3.30 31/03/2023 15:59:31	N.			
	DLR653	DLR653	TREESAFE	TRUCK 4WHEELER	TREESAFE	TREESAFE	8.88 2/02/2023 16:48:34	N.			
	DOM827	DOM827	DOM827	TRAILOR ONLY	GRNGUY	THE GARDENING GUYS	2.12 13/05/2023 15:41:18	191			
	DWG256	DWG256	POMMY GREEN	TRUCK #WHEELER	POMGRE	POMMY GREEN	2.20 16/05/2023 08:45:35	N N			
	FR3113	EB1113	FB3113	TRAILOR ONLY	GROMAIN	GROWTH MAINTENANCE	1.06 30/03/2023 14:07:12	N.			
	ECY962	ECY962	ECY962	TRUCK 6WHEELER	ASSPLUNG	ASPLUNDH	11.40 26/07/2022 17:41:00	12			
	EDH386	EDH386	TREFEL	TRUCK 4WHEELER	TREFEL	TREE FELLAS	4.88 21/02/2023 08:22:33	N.			
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