Admin Customers

Customer Categories allow the grouping of customers sharing common characteristics, e.g. Mail Order Customers, Regulars or Insurance Sales.

Export Customers allows you to export your customer names and addresses to a text file for use in other applications, e.g., Microsoft Word or Excel.

To access Customer Codes:

1) Select Alt A Admin from the Main Menu
2) Select F8 for Customers from the Admin Menu

All Customer codes are grouped under the Catalogue menu.

Options include:

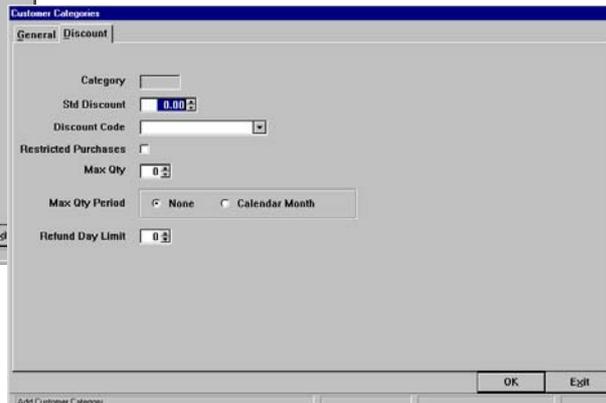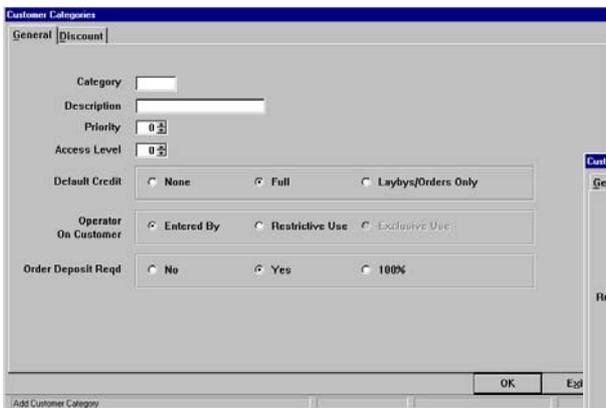- Customer Categories
- Export Customers

Maintenance to the Customer Codes may be performed from any workstation although changes will not become active on other stations until WinSTORE is closed and restarted on those stations.

Customer Categories

A list of all current Customer Categories is displayed. Select from one of the available action buttons to maintain the Customer Categories.

Add	Select to create a new Customer Category
Change	Select to alter the detail of an existing Customer Category
Delete	Select to remove an existing Customer Category (do not delete a category if there are customers attached to that category)
Print	Select to print a list of all current Customer Categories
Exit	Select to return to the main Admin menu

Customer category information is held on two separate tabs, General and Discount.

General Tab
Category
A 3 character code to represent this category.

Description
The description or name of the category.

Priority
Establishes the order in which the customer categories are sorted when creating a new customer account. Each category must have a priority set. The most frequently used should be 1 and Suspended should be the last priority number.

Access Level
The Operator access level required for this category to be selected.

Default Credit
Nominates the default credit setting for this customer category.

None	Customer account can be used to record sales history and/or loyalty club only. No Orders, Laybys or Invoices.
Full	Customers within this category may have Invoices, Laybys or Orders
Laybys / Orders Only	Laybys and Orders but not Invoices.

Operator on Customer
In conjunction with settings in POS Codes - Operators, allows for restrictive operator use when the operator and the customer within this category are the same person, i.e. an employee processing a sale to him/herself.

Entered By	The operator code will be recorded with the transaction details
Restrictive Use	The operator and the customer can not be the same, i.e. an employee can not sell an item to him/herself.

Order Deposit Required
In conjunction with POS Codes - Operators - Access, nominates whether customers within this category are required to leave a deposit on orders.

No	No order deposit is required
Yes	The default order deposit as set in System Defaults - Customers, is required
100%	The item must be paid in full before ordering.

Discount Tab
Category
Display only, maintenance not permitted.

Std. Discount
Input a standard discount applicable to any customer within this category. If used, when a sale is made to a customer within this category the operator will be asked if they wish to apply this discount percentage, the discount is not automatically applied.

Discount Code
In conjunction with the percentage set above, and Discount Code settings in System Settings - Details 1, and POS Codes - Discount Codes. Assigns a discount code to use if the prompted discount is applied when a sale is transacted.

Restricted Purchases
Prevents a customer within this category from purchasing the same product more than once at a discounted price.

Max Qty
The maximum quantity of items allowed to be purchased within a time frame (as designated in the following setting). Leave blank if there is no maximum quantity restriction.

Max Qty Period
In conjunction with the previous setting, nominate a time period within which the maximum quantity of items may be sold

Refund Day Limit
Nominates the time limit (in days) in which a customer under this category may return an item(s).

Export Customers

This function allows you to export your customer name and address information to a text file for use in another software application.