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# Customer Accounts

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Customer Accounts provide the facility to maintain extensive records of customer details and customer transactions. All sales and service transactions, loyalty club details, discounts, contact details and miscellaneous notes may be maintained. Once a specific customer account is created, all activity for that customer may be tracked.

Transactions may be performed against a customer account within the defined parameters, (determined and set within the administration facility). A customer account will track separately all Laybys, Invoices, Orders and Loyalty Club Sales. Direct sales may also be linked to a customer account to build a customer sales history, although this is not a compulsory requirement.

-  This chapter deals with creation and maintenance of Customer Accounts. For information on performing customer transactions refer to the Operation - Sales manual.

<i>Accessing Customers</i>	2
<i>Adding A Customer</i>	3
<i>Finding A Customer</i>	5
<i>Account Maintenance</i>	6
<i>Account Transaction Maintenance</i>	8

## Accessing Customers

To access Customer Accounts for maintenance, select F10 from the Main Menu. Customer Account may be accessed automatically when performing certain sales transactions, refer to Sales-Account Sales and to Loyalty Club-Sales.



The screenshot shows a window titled 'Select Customer' with a menu bar containing: 1 All, 2 Local, 3 Mail Order, 4 30Day Accounts, 5 Regular, 6 Suspended Customers. Below the menu bar are two checkboxes: 'Business Only' (unchecked) and 'Show Suspended' (checked). The main area is a table with columns: Full Name, Suburb, Phone, and Cat. The table contains the following data:

Full Name	Suburb	Phone	Cat
BROWN, SUE		5333 3333	LBC
JOHNSTON, GRAHAM		1234 5678	LBC
JONES, ARTHUR		2222 2222	HBI
SMITH, JO		1111 1111	LBC
MESTFIELD SHOPPINGTOWN			300

At the bottom of the window is a toolbar with buttons: Select, Find, Add, View, Loyalty, Account, Delete, Merge, and Exit. The window title bar also includes the text 'WinSTORE'.

The first tab, (1. All), contains all customers in all categories. All other tabs reflect the Customer Categories as set in Admin-System Control Codes-Customer Codes.

Customer Categories are an optional facility to allow grouping of certain types of customers for reporting purposes. This has a twofold benefit of sorting customers for easier selection and also of applying the attributes of a specific category immediately on creation of the customer account.

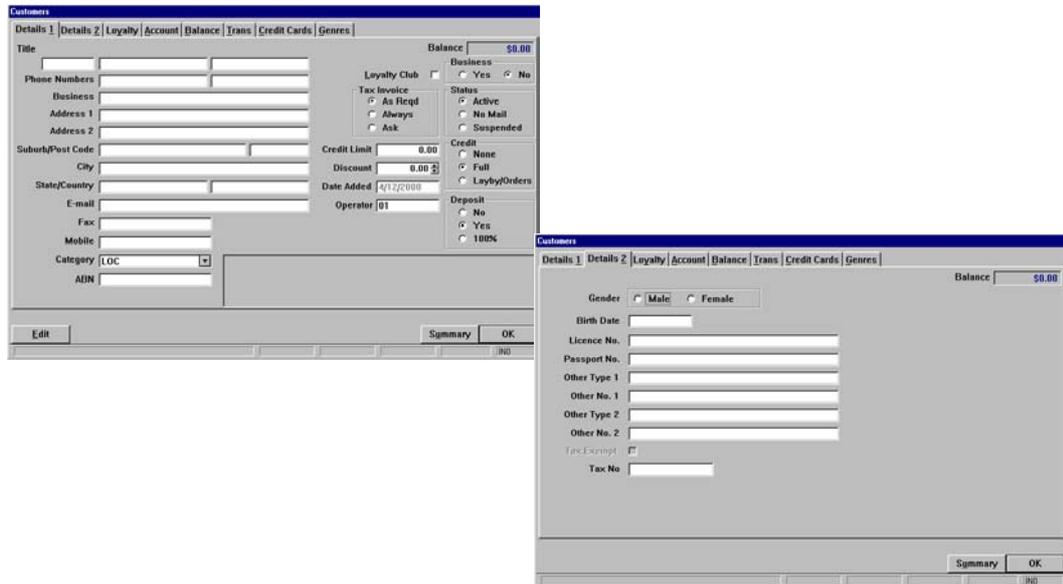
E.g. A category of VIP may be created entitling certain customers to a discount of 10% off all items. When a customer account is created and nominated as a VIP category, all sales to that customer will automatically prompt to apply a 10% discount.

Refer to Administration - Customer Menu manual for information regarding set up and control of Customer Categories. There must be at least two categories, including 'Suspended'.

There are also two options to show 'Business Only' and 'Suspended'. Suspended is a category in its own right, whereas Business depends on how the customer details are input.

# Adding A Customer

Select Alt A Add to create a new Customer Account.



## Customers - Details 1 Tab

\* Leave blank any fields that are not relevant - First name and surname fields must be filled.

### Title

Three fields for the customer's title, given name and surname. The input order is title, given name, surname.

### Phone Numbers, Business Name & Address Details

Enter any requirements or leave blank.

### Category

Select a category for this customer. There must be at least one category, aside from Suspended.

↻ Refer to the Administration - Customer Menu manual for information regarding set up and control of Customer Categories

### ABN

The customer's ABN if required.

### ID

This field will only appear if Customer ID's are selected in Admin-System Defaults-Customers.

### Loyalty Club

Check this box to indicate loyalty club membership.

### ***Tax Invoice***

Select when a tax invoice is required. A tax invoice will be identified as such on a receipt, and will include the customer's name and ABN.

As Required	A tax invoice will print after the threshold is exceeded.
Always	A tax invoice will always print.
Ask	Operator will be prompted to print tax invoice.

### ***Credit Limit***

If required, enter a credit limit that this customer may not exceed for Invoice purchases.

### ***Discount***

If required, enter a discount that this customer is normally entitled to. This discount will not automatically be applied to a sale, the operator will be prompted to apply the discount or not. If the category selected for this customer has a discount percentage attributed then the customer discount may not exceed the category discount.

### ***Date Added***

Automatically inserted.

### ***Operator***

Automatically inserted.

### ***Business***

Select Yes to list under the Business Name or No to list under the Surname.

### ***Status***

Active	Customer may be selected for transactions as set in next option, (Credit).
No Mail	Pertaining to printing address labels. Account is active but will be excluded if labels are produced.
Suspended	No transactions may be processed.

### ***Credit***

None	Account is active for fully paid or Loyalty sales only.
Full	Account may be used for Invoices, Layby and Orders.
Layby/Orders	Invoicing not available.

### ***Deposit***

Depending on setting in Admin-System Defaults-Customers.

Yes	A deposit will be prompted based on System Default.
No	A deposit is not required for this customer.
100%	☛ This setting overrides System or Operator Defaults. Invoices, Laybys and Orders must be paid in full.

### ***Notepad***

Free form text for any required notes.

### ***Details 2 Tab***

Allows for further information, input any requirements.

## Finding A Customer

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There are three fixed and one optional methods of finding a customer.

1. Similar to catalogue search, start typing the customer name. As each letter is typed the search proceeds. This is the fastest search method.
2. Use the arrow keys to move up or down the customer list.
3. Select Alt F Find. This is a more detailed search, specifically by name, address, phone or fax number. If 'Everywhere' is selected, the search will be conducted throughout all customer details fields to match your search criteria. Alternately, select the specific field your criteria will be located in. If more than one customer is located containing the search criteria, a selection box will open displaying all customers in the search result. Arrow up and/or down to locate the required customer. Once the required customer is highlighted, press Enter and the details are then opened and displayed.



4. If Customer IDs have been enabled within your system, a search can be performed by Customer ID.
  - a. Select F10 for Customers
  - b. Press ESC Escape
  - c. Input the ID, then select Alt F Find
  - d. If a customer is located, the name and address details will appear within the box. Select Alt S Select to select the customer for a sale, or select Alt V View to view the customer details.



 Refer to the Administration - System Defaults, page 14 for information regarding set up and control of Customer ID's.

Once the required customer is located, there are several other options available.

- Alt S Select** Selects the highlighted customer back to the sales screen to perform a transaction. (or press enter)
- Alt V View** View the details of the highlighted customer account.
- Alt L Loyalty** Check loyalty points accrued for the currently highlighted customer.
- Alt C Account** Check currently outstanding Invoices, Laybys and/or Orders for the highlighted customer.
- Alt D Delete** Delete the highlighted customer. Only available if no transactions have been performed. Once a customer has transaction history they can only be suspended.
- Alt M Merge** Merges the transaction details of two or more accounts.
  1. Highlight the account to be merged from, this account will be removed.
  2. Select Alt M Merge, then select OK
  3. Select the Account to be Merged to, then select OK
- Alt X Exit** Exit the Customer list and returns to sales.

# Account Maintenance

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To access, find the customer then select Alt V View.

## **Loyalty Tab**

Details of all purchases made against loyalty club. Points available for redemption appear in black, while points redeemed appear in green.

## **Alt S Summary**

Summarises the loyalty points showing the minimum points required for redemption, the total points currently accrued, the required points before the minimum value is reached, the expiry date of the points and each item purchased that has accrued points currently available.

## **Account Tab**

Details of all invoices, laybys and orders. Current outstanding items are shown in black at the top of the list and closed or completed items appear in green at the bottom of the list. Cancelled items appear in red.

Available Options:

### **Alt E Edit**

Select to alter certain item detail. Not available on completed or cancelled items. Alt P To alter the retail price, Alt Q to alter the quantity or Alt C to input a comment. The Required Change options will differ according to the item line.



### **Alt L Laybys**

### **Alt O Orders**

### **Alt I Invoices**

### **Alt A All Lines**

One button is used to access all three account types which will toggle between the four selections.

If the customer has only two transaction accounts the button will only toggle between those two account types, e.g. If a customer has only ever had laybys and not orders or invoices, the toggle option will not be available.

### **Alt M Payments**

Shows all previous payments made on the selected item.

### **Alt R Re-Order**

Only available on uncompleted transaction lines, places the item back to the order placement file.

### **Alt P Print**

Reprints invoice or receipt for the transaction.

### **Summary**

Prepares a printable report, summarizing the transactions from within the currently displayed transaction type.

### **OK**

Exits from the customer account and returns to the Customer Selection List.

## **Balance Tab**

The total and individual account type balances.

### ***Transactions Tab***

The complete chronological transaction history of the customer.

 Refer to the Operation - Trading manual for more information on reading and interpreting transactions.

### ***Credit Card Tab***

Displays and maintains details of customer credit cards including type of card, the name on the card, the card number and expiry date of the card.

By choosing action buttons you are able to add, change and delete details. This function may be disabled due to legislation within your state or country.

### ***Customers - Genres Tab***

Allows you to indicate the musical genre interests of each customer.

## *Account Transaction Maintenance*

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There are three types of Customer Account transactions - Invoices, Laybys and Orders. At any time, all current (incomplete) Account lines may be listed by the transaction type for editing or maintenance.

Customer Orders are not reported as 'Sales' until paid out and marked as taken. Refer to Chapter 1. Sales.

To access all current Customer Invoices, Laybys or Orders;

1. Input Operator ID
2. Type either IN for Invoices, LB for Laybys or OR for Orders.

<i>Customer</i>	Customer Name
<i>Date</i>	Original date of transaction
<i>OP</i>	Original operator ID
<i>Title</i>	Item title
<i>Sup</i>	Item supplier
<i>Qty</i>	Quantity
<i>Status</i>	Current status of the item, if an order the status may be 'To Order' or 'Received'
<i>Balance</i>	The remaining balance owing on the item (not the full account balance)
<i>Price</i>	Original retail price
<i>Changed</i>	The last date when a change occurred to the status, eg a payment was made.
<i>Artist</i>	Artist of the item
<i>Cat. No</i>	Catalogue Number

Available Options:

<i>Alt D Date</i>	Select to re-sort into date order
<i>Alt S Select</i>	Select an item for further action, refer to Chapter 1. Sales
<i>Alt F Find</i>	Find a particular account, input search criteria and select OK
<i>Alt E Edit</i>	Edit a line, see previous section
<i>Alt P Payment</i>	View all previous payments on highlighted item
<i>Alt R Reprint</i>	Reprint the receipt or invoice
<i>Alt K Dockets</i>	Available only on 'OR' orders, where docket printing is set to 'Hold' in Admin-System-Details 3. Prints a docket for all received customer orders that have not yet had a received docket printed.
<i>Alt X Exit</i>	Return to Sales Screen