

# Customer Module



- Customer account records can be created manually within the Customer Module or on-the-fly in sales transaction entry
  - Manual or auto-generation of new customer account numbers
  - Customer “**Type**” classification for filtering and reporting
  - Assign loyalty card numbers to account record to be picked up by sales modules
  - Maintains turnover and sales points on master account and individual loyalty card
  - “**Mail Shot**” flag on customer record can be ticked if customer gives permission to receive your direct mail, emails, texts etc.
  - Customer Labels
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- Flag customer as being “**On stop**” to prevent any new sales to customer at the point-of-sale
  - Option to set up a “Club” customer and enter payments on their account to build up a credit fund
  - Club account credit can be used in the sales modules to part or fully pay a transaction
  - Set up a “Gift Voucher/Gift Card” customer and enter gift voucher amount
  - Gift Voucher/Gift Card credit can be used in all the sales modules to part/full pay a transaction
  - **Memo** tab on customer record stores unlimited free-type text
  - **History** tab holds customer’s transaction history with drill-down to detail on each transaction
  - **Extd** tab allows you to store personal details on customer such as birth date, martial status, number of children, occupation landlord, employer, bank account numbers, insurer etc.
  - **Search** button lets you locate a customer record by all the major lookup filter fields
  - **Comm** button displays a history of all previous e-mail, phone, letter and mail shot communications to the customer (see screen image on right)
  - E-mail, letter and direct mail communications are automatically logged in customer’s “Comm” history
  - Details of conversations can be manually logged in the Comm history
  - Use the “**Documents**” feature of Comm to dynamically create, print and log an e-mail or a letter to the selected customer
  - Statement Printing for debtor accounts
  - Aged Debtors reporting (summary and detailed) by customer and sales person.
  - Sales analysis reporting by customer

Contact Details						
Add Item		Remove Item				
Date	Time	Salesperson/Type	Contact/Mailshot	Doc Type	Doc. No.	Comments
30/10/2008	09:45	EMAIL	Sales Order	Order	1/46	
24/07/2008	20:49	REPORTS	Reminder Letter	Rental	1/13	
08/07/2008	17:37	QUOTATION	FOR HOUSE FIT OUT	Customer	1/13	
22/12/2008	14:03	MAIL SHOT	IPOD Special Offer	Customer		Introductory o
22/12/2008	14:12	PHONE CALL	New Plasma TV is in	Customer		