

How to add/edit/delete Customer (Accounts)



All back office options are accessed through the green setup key at the top of the screen. This key is only available to managers. To access the back office setup, enter the manager code and the Setup button appears. Enter the manager password and instead of pressing the return (←) key press the Setup button to move in to the back office suite.

When are customers used?

Customers are used in three areas of the myPOS EPOS system. Firstly, they are used for the 'On Account' system, secondly they can be used for the 'Table reservation' system for restaurants and thirdly the customer file is used for the rewards / membership systems available.

To add, change or delete a customer, select the 'System Setup' button denoted by a keyboard as shown below. Then select the 'POS Control Data' Button. Finally select the 'Customers' button

Buttons to press...



The Customer screen (and most myPOS control data screens) have the following: New Record, Modify Record, Delete Record, Find Record and Exit buttons. To add a New Customer click on the New Record button.

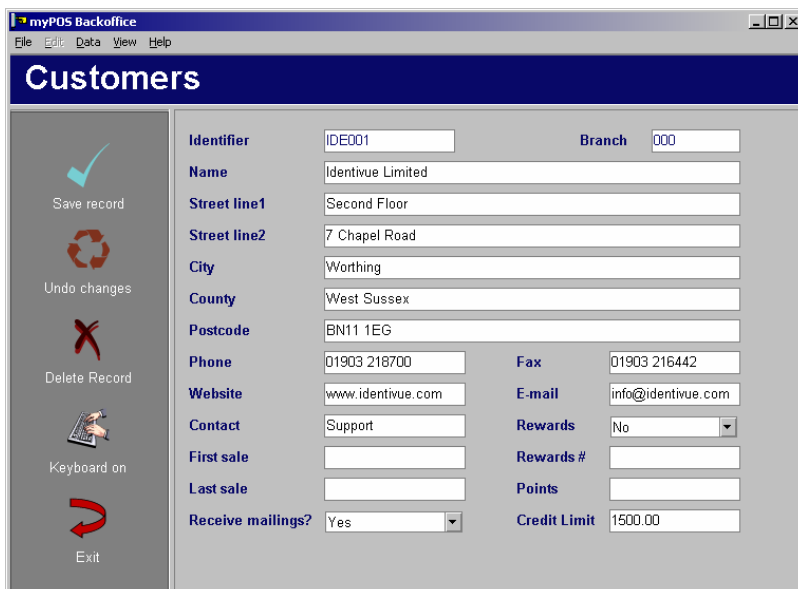
Identifier	Unique identifier, leave blank for system to generate
Branch	Branch no, used if customer has multiple addresses
Name	Name of customer
Street 1-2	Street / address lines
City	City, Town or village of customer
County	County of customer
Postcode	Postcode of customer

Phone	Phone number of customer
Fax	Fax number of customer
Website	Website of customer
e-mail	e-mail of customer
Contact	Contact name of customer (maybe same as name)
Rewards	Yes / No – is customer member of rewards system
Rewards #	Rewards number / Membership ID
Points	Current reward points
First Sale	Date of first sale to this customer
Last Sale	Date of last sale to this customer
Receive mailings	Does this customer receive mailings
Credit Limit	Credit limit of customer (used with On Account option)

Save the record using the 'Save Record' button.

To modify a Customer click on the 'Modify Record button' or click on the customer record in question, show in the list on the right of the screen.

To delete a Customer click on the 'Delete Record' button.



The screenshot shows the 'myPOS Backoffice' window with a 'Customers' form. The form contains the following fields:

- Identifier: IDE001
- Branch: 000
- Name: Identivue Limited
- Street line1: Second Floor
- Street line2: 7 Chapel Road
- City: Worthing
- County: West Sussex
- Postcode: BN11 1EG
- Phone: 01903 218700
- Fax: 01903 216442
- Website: www.identivue.com
- E-mail: info@identivue.com
- Contact: Support
- Rewards: No (dropdown menu)
- First sale: (empty field)
- Rewards #: (empty field)
- Last sale: (empty field)
- Points: (empty field)
- Receive mailings?: Yes (dropdown menu)
- Credit Limit: 1500.00

On the left side of the form, there is a vertical toolbar with the following buttons: Save record (green checkmark), Undo changes (red circular arrow), Delete Record (red X), Keyboard on (keyboard icon), and Exit (red circular arrow).

Technical data:

The records are contained in a file called 'Customer' in the Data folder.