



# V6 Customer Records

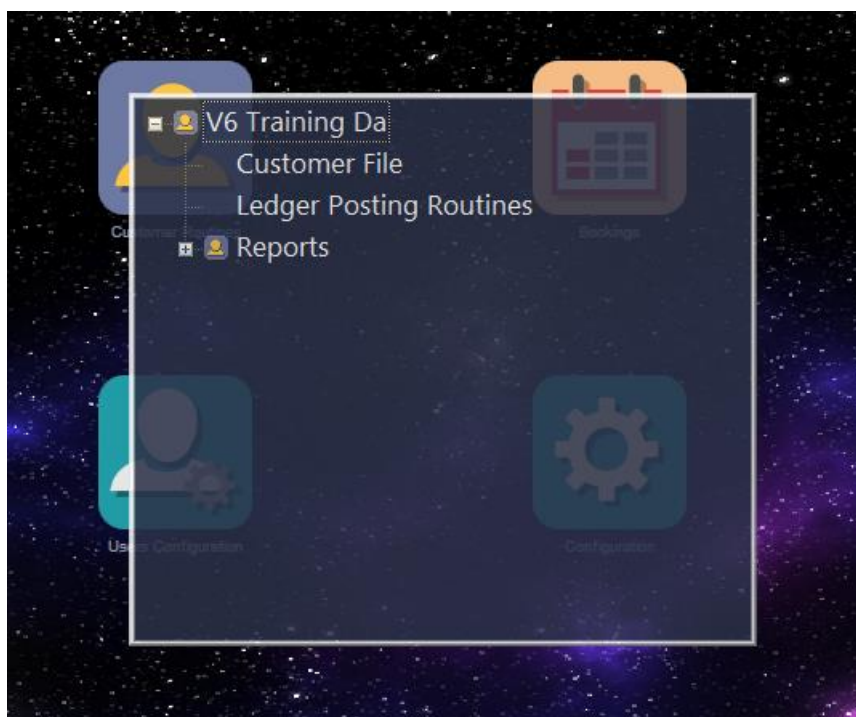
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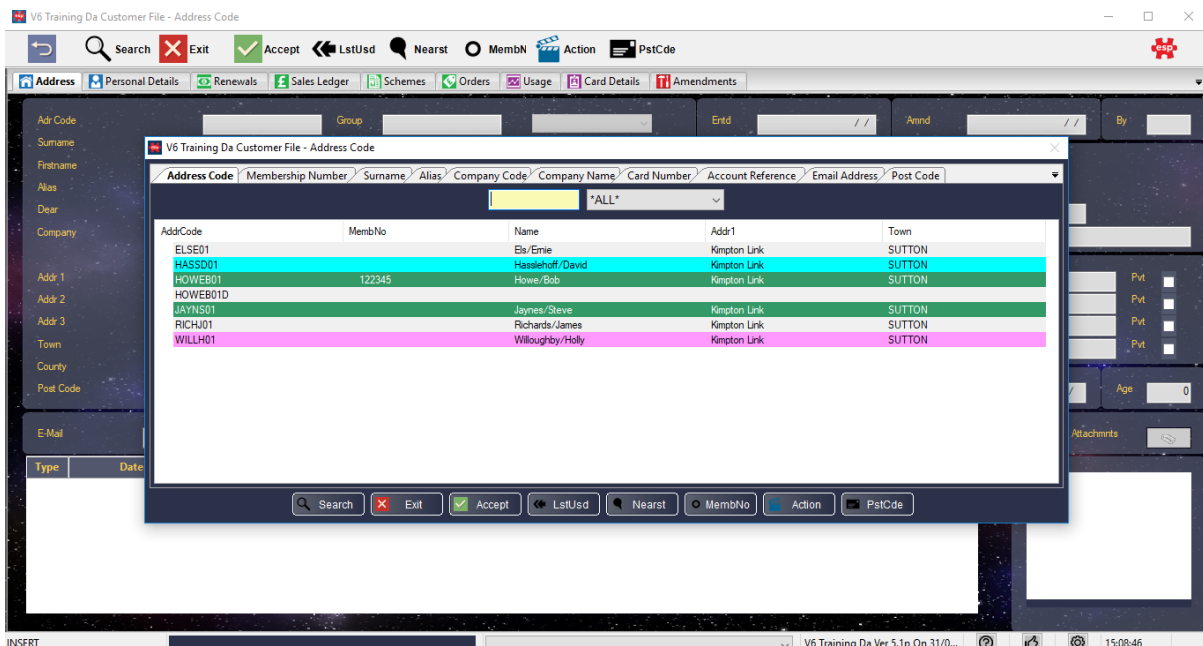
## 1. Creating A Customer Record



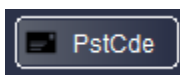
Select **Customer Routines**.



Select **Customer File**.



The above Filter Screen will be displayed



Select **F10 PstCde** and the following screen will be displayed.

The screenshot shows a form for entering member details. The fields are: Surname, Firstname, Post Code, House, Company, Addr 1, Addr 2, Addr 3, Town, and County. The Surname field is highlighted in yellow. At the bottom of the form, there are three buttons: Help, Exit, and Create.

Enter the Surname, First name and Title for the new member followed by the Postcode. After filling in the Postcode the Elite system will search for addresses with that postcode.

If you have the Postcode Interface installed (AFD Postcode Software) the official postal address for the postcode which was entered will be displayed.



Select Address						
1	New Recd	Mildner/Steve	Kimpton Road	.	SUTTON	Surrey
2	WILLK01	Williams/Karen	Europa House 1 Kimpton Link	40 Kimpton Road	SUTTON	Surrey
3	LANEP01	Lane/Peter	Europa House 1 Kimpton Link	40 Kimpton Road	SUTTON	Surrey
4	JAYNS01	Jaynes/Steve	Europa House 1 Kimpton Link	40 Kimpton Road	SUTTON	Surrey
5	SMITA01	Smith/Adam	Europa House 1 Kimpton Link	40 Kimpton Road	SUTTON	Surrey
6	WILST01	Wilson/Tony	Europa House 1 Kimpton Link	40 Kimpton Road	SUTTON	Surrey
7	DAWSK01	Daws/Karen	Europa House 1 Kimpton Link	40 Kimpton Road	SUTTON	Surrey

OK Cancel

Whether you have the Postcode Interface installed or not, the Administration System will search for any existing records which have the same Postcode and/or the same Surname.

## 2. Selecting A New Record

When you select the 'New Recd' option from the top of the list, you will be returned to the previous screen, however the address will now have been completed automatically, as shown below.

The screenshot shows the 'Elite v6 V6 Training Da Customer File' application. The main window displays a form for creating a new record. The form is divided into several sections:

- Address Section:** Includes fields for 'Addr Code' (TESTW01), 'Surname' (Tester), 'Firstname' (Web), 'Town' (Kimpton), 'County' (SUTTON), and 'Post Code' (Surrey).
- Membership Section:** Includes fields for 'Type' (Member), 'Membership No', 'Account Refmoe', 'Memb. Type', 'Home Tel', 'Work Tel', 'Other', and 'Mobile'.
- Personal Details Section:** Includes fields for 'Gender', 'DoB' (01/01/1970), and 'Age' (0).
- E-Mail Section:** Includes a field for 'E-Mail' and a checkbox for 'Pvt'.
- Attachments Section:** Includes a button for 'Attachments'.

The form is displayed in a dark-themed interface with a navigation bar at the top and a status bar at the bottom.

This has now created an Address Code which is the unique identifier for the record. You can now complete further details regarding this member such as telephone numbers, gender, date of birth and e-mail address.

### 3. Selecting An Existing Record



When you select a record which already exists within the database, the following menu will be displayed.



The three options displayed are:

#### 1. Select This Record

By clicking on **Select This Record** the system will abandon creating a new record and take you to the existing record which you selected on. This helps to ensure that you do not end up with duplicate records in the database

#### 2. Add Using This Records Address

By clicking on Add Using This Records Address the system will create a new record, copying all the address details from the record which you selected on, as shown in the example below.

#### 3. Add as A Relation to This Record

By clicking on Add as A Relation to This Record the system will create a new record, copying all the address details from the record which you selected on, however it will also populate the **Group** field.



The Address Code of the existing record which you selected will have been populated into the Group Field to create an association between the two. You can now complete the next field which is the relationship/association description between the new record and the existing one, e.g. Husband and Wife, Brother and Sister, Company & Bearer etc

To view the Associated Record



Select **F7 Action**

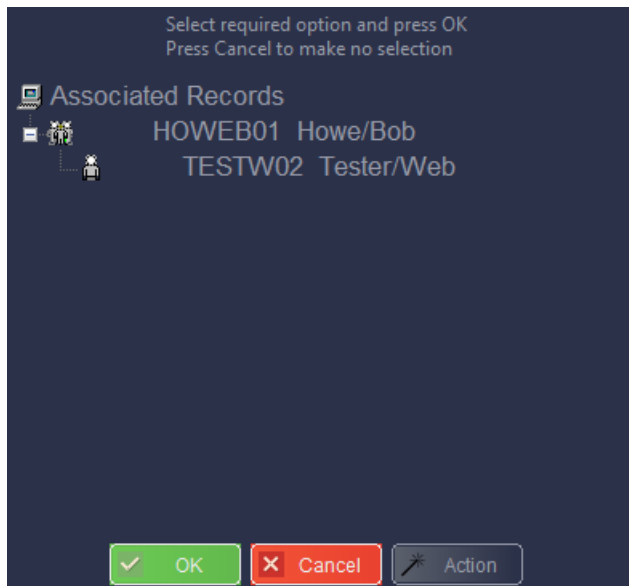


Select **Show Associated Record**





The screen below will be displayed.

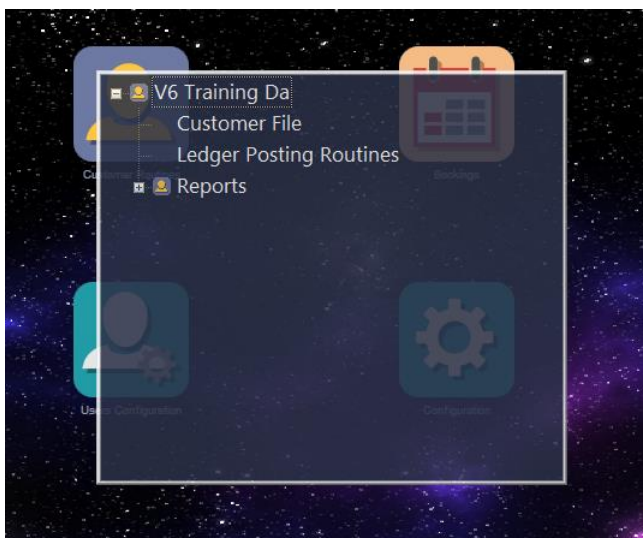


#### 4. Customer Messages

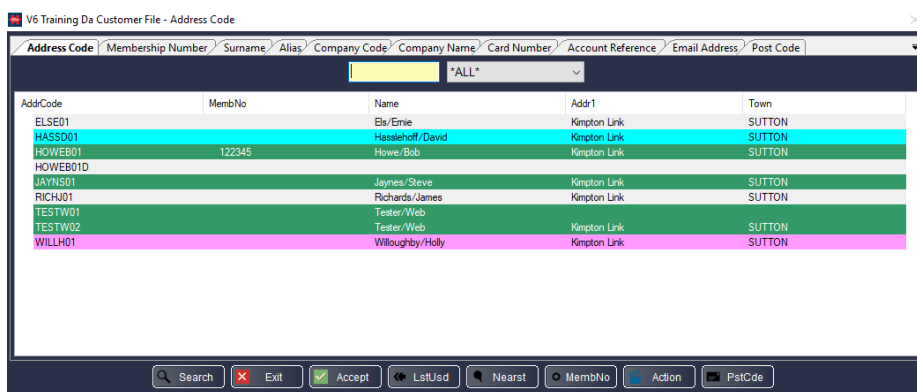
You can add a message to an Individual Member's/Customer's Record which can be displayed whenever the customer is identified at Point of Sale using the **'Identify Customer'** Button or the **'Leisure Arrivals Routine'**.



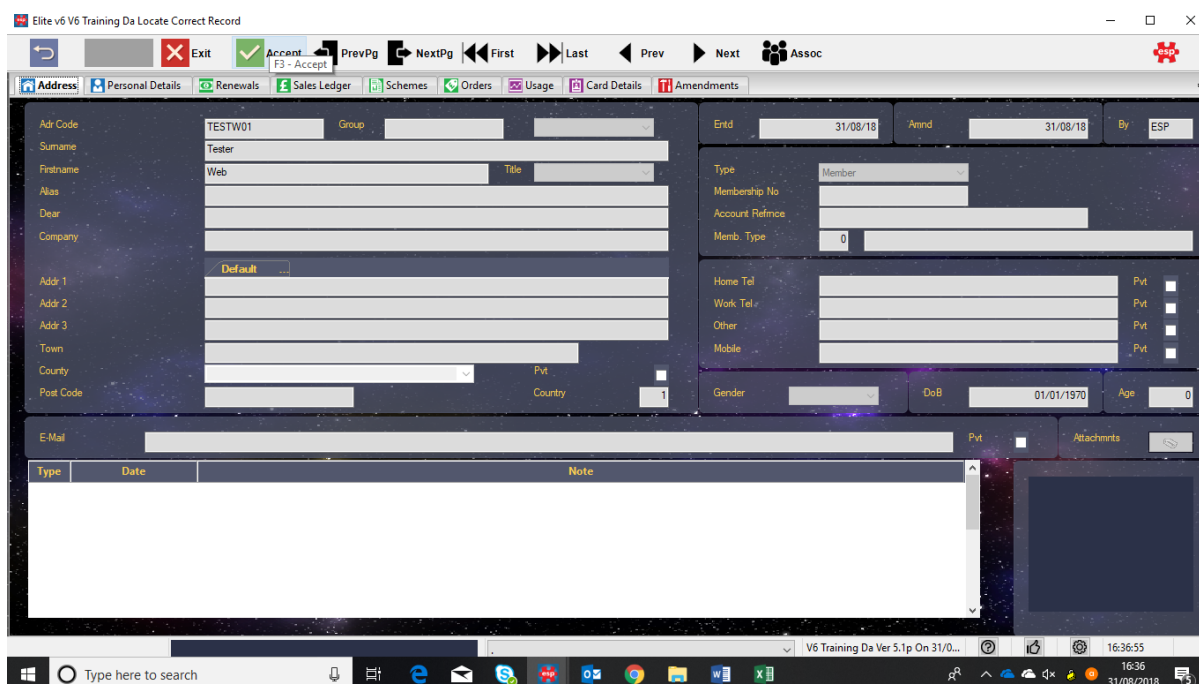
Select Customer Routines



### Select Customer Files



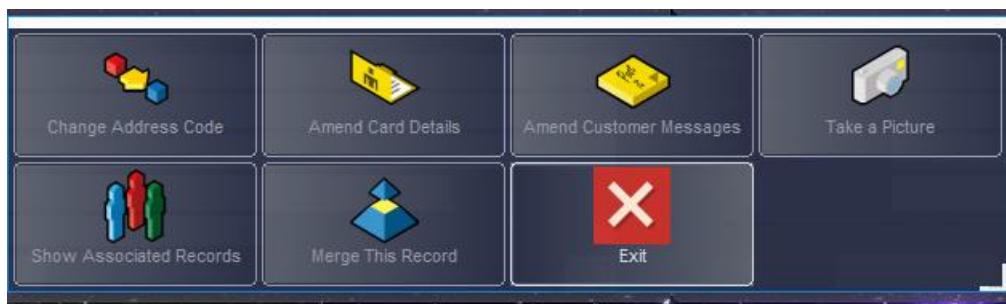
Select the Customer Record which the messages are being added to. The following screen will be displayed.







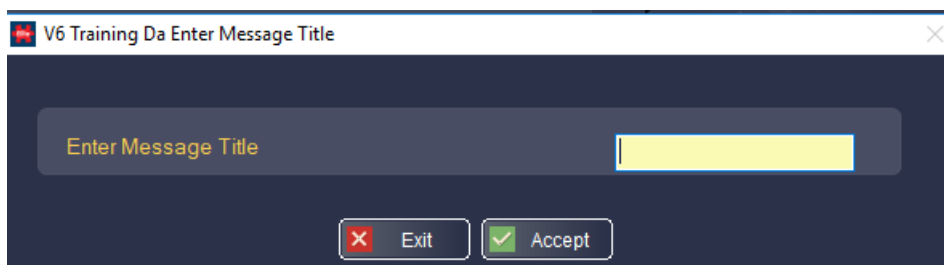
Select F7 Action



Select Amend Customer Messages.



Select Create New Message.



Enter a name for the new message and select **F3 Accept**. A new message screen will be displayed, as shown below.



Message Code	TESTW01_TEST		
Date Created	31/08/18		
Date Amended	31/08/18		
Amended By	ESP		
Group Code	<input type="text"/>	Sales Area	<input type="text"/>
Dependency	<input type="text"/>	Screen	<input checked="" type="checkbox"/>
Field Type	<input type="text"/>	Receipt	<input type="checkbox"/>
Question	<input type="checkbox"/>	Validate	<input type="checkbox"/>
		Internet	<input type="checkbox"/>
Valid From	<input type="text"/>	To	<input type="text"/>
		Time	<input type="text"/>
<input type="text"/>			
<input type="text"/>			
<input type="text"/>			

The dependency and the field type for the message must be left blank for this to function correctly.

The question box can be selected as **Y** or **N** to define whether you want a **Yes/No** option or just an **OK** button on the message.

The **Sales Area** will be left blank.

You can then select whether you wish the message to be viewed on the Screen, Receipt and/or Validation Ticket.

The Valid From/To field allows you to specify a validity period for the message.

Complete the details of the message in the bottom three lines of the message. Once your message is complete, you will have a screen which resembles the example below.

Message Code	TESTW01_TEST		
Date Created	31/08/18		
Date Amended	31/08/18		
Amended By	ESP		
Group Code	<input type="text"/>	Sales Area	<input type="text"/>
Dependency	<input type="text"/>	Screen	<input checked="" type="checkbox"/>
Field Type	<input type="text"/>	Receipt	<input type="checkbox"/>
Question	<input type="checkbox"/>	Validate	<input type="checkbox"/>
		Internet	<input type="checkbox"/>
Valid From	<input type="text"/>	To	<input type="text"/>
		Time	<input type="text"/>
This Message Will Be Displayed			
At The Point Of Sale			
<input type="text"/>			

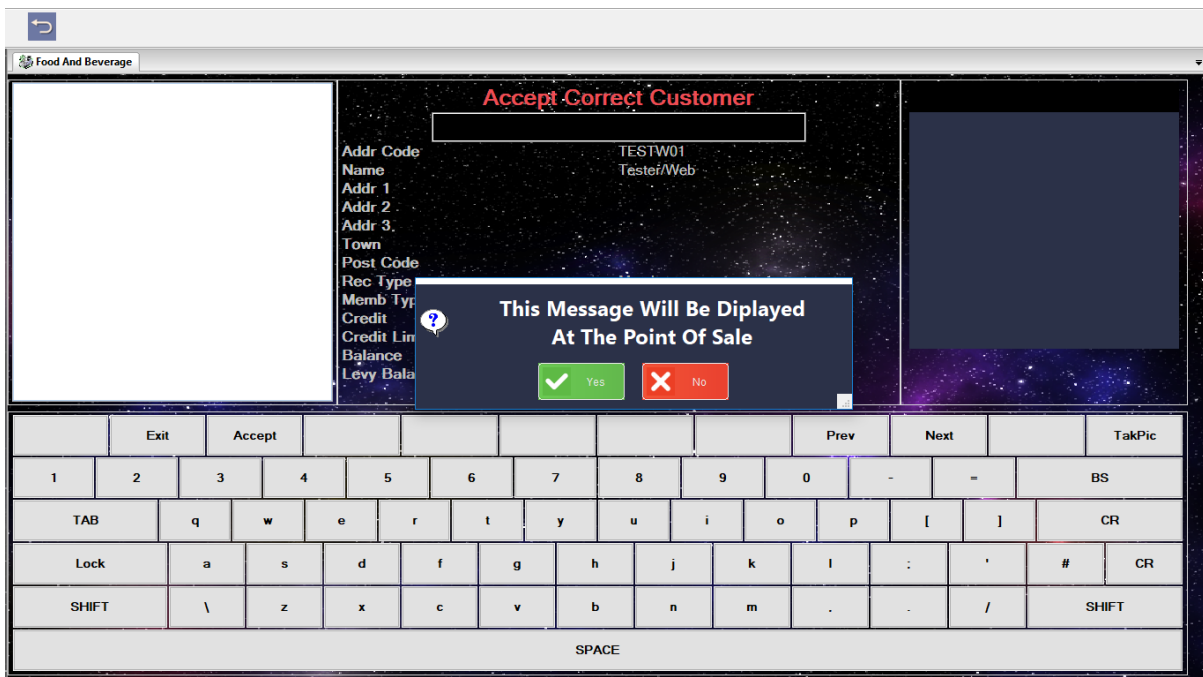


Select F2 Exit. The screen below will be displayed.



You will now have a new icon for the message which has been created.

When the customer/member is identified at Point of Sale, the message will automatically be displayed, as shown below.



The screenshot shows a POS interface with the following elements:

- Header:** "Food And Beverage" and "Accept Correct Customer".
- Customer Profile:**
  - Addr Code: TESTW01
  - Name: Testei/Web
  - Addr. 1
  - Addr. 2
  - Addr. 3
  - Town
  - Post Code
  - Rec Type
  - Memb Type
  - Credit
  - Credit Lin
  - Balance
  - Levy Bala
- Confirmation Dialog:** "This Message Will Be Displayed At The Point Of Sale" with "Yes" and "No" buttons.
- Keypad:**
  - Exit, Accept, Prev, Next, TakPic
  - 1, 2, 3, 4, 5, 6, 7, 8, 9, 0, -, =, BS
  - TAB, q, w, e, r, t, y, u, i, o, p, [, ], CR
  - Lock, a, s, d, f, g, h, j, k, l, :, ', #, CR
  - SHIFT, \, z, x, c, v, b, n, m, ., /, SHIFT
  - SPACE