
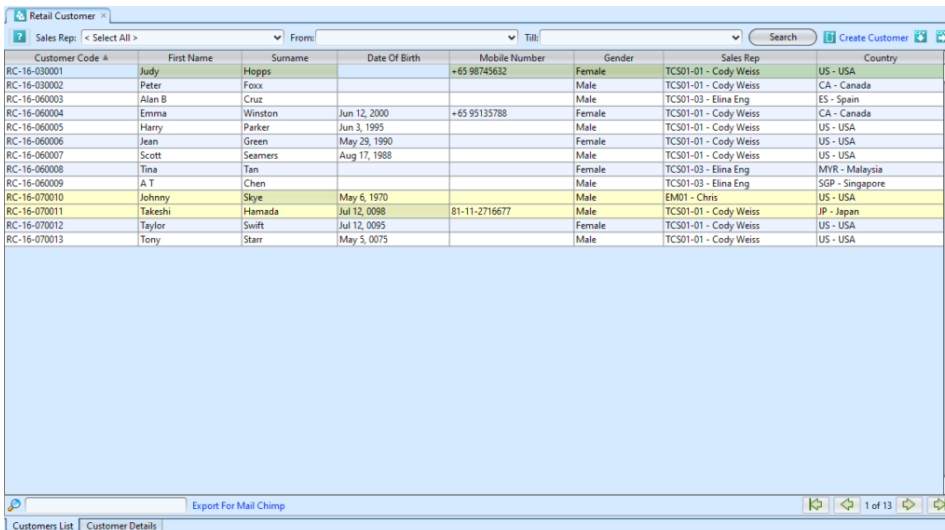


# Retail Customer

Retail Customer view allows user to manage / register retail customers in POS (Point of Sale) module. Below are available actions for the user from Retail Customer view:

-  Create new retail customer
-  Update retail customer details
-  Delete retail customer
-  View and search for retail customer details
-  Import and export of retail customer data:
  1. Export to CSV file
  2. Import from CSV file
  3. Export for Mail Chimp



Customer Code	First Name	Surname	Date Of Birth	Mobile Number	Gender	Sales Rep	Country
RC-16-030001	Judy	Hopps		+65 98749632	Female	TCS01-01 - Cody Weiss	US - USA
RC-16-030002	Peter	Fox			Male	TCS01-03 - Cody Weiss	CA - Canada
RC-16-060003	Alan B	Cruz			Male	TCS01-03 - Elna Eng	ES - Spain
RC-16-060004	Emma	Winston	Jun 12, 2000	+65 95135788	Female	TCS01-01 - Cody Weiss	CA - Canada
RC-16-060005	Harry	Parker	Jun 3, 1995		Male	TCS01-01 - Cody Weiss	US - USA
RC-16-060006	Jean	Green	May 29, 1990		Female	TCS01-01 - Cody Weiss	US - USA
RC-16-060007	Scott	Searners	Aug 17, 1988		Male	TCS01-01 - Cody Weiss	US - USA
RC-16-060008	Tina	Tan			Female	TCS01-03 - Elna Eng	MYR - Malaysia
RC-16-060009	A T	Chen			Male	TCS01-03 - Elna Eng	SGP - Singapore
RC-16-070010	Johnny	Shye	May 6, 1970		Male	EM01 - Chris	US - USA
RC-16-070011	Takeshi	Hamada	Jul 12, 0098	81-11-2716677	Male	TCS01-01 - Cody Weiss	JP - Japan
RC-16-070012	Taylor	Swift	Jul 12, 0095		Female	TCS01-01 - Cody Weiss	US - USA
RC-16-070013	Tony	Starr	May 5, 0075		Male	TCS01-01 - Cody Weiss	US - USA

Export For Mail Chimp

Retail Customer

Customer Code: <-AUTO-GENERATED-> First Name: Surname: Gender: [Dropdown]

Date Of Birth: [Dropdown] Country: [Dropdown] Sales Rep: [Dropdown] How do you know about us?: [Dropdown]

Join Loyalty: [Checkbox] Loyalty Joined On: 24/08/2016 Location: [Dropdown] Is Active?: [Checkbox]

**Contact Info**

Mobile Number: [Text] Address: [Text Area]

City: [Dropdown] Postal Code: [Text]

State: [Dropdown] Country: [Dropdown]

Phone1: [Text] Phone2: [Text] Fax: [Text]

Email: [Text] Website: [Text]

Buttons: Create New, Save, Revert, Delete

Customers List | Customer Details

Field Name	Description	Mandatory Information
Customer Code	Custom code for the customer	Y
First Name	First name of customer.	Y
Surname	Family name of customer.	N
Gender	Male or female	Y
Date of Birth	Self-explanatory	N
Country	Self-explanatory	N
Sales Rep	Sales representative staff who served the customer.	N
How do you know about us?	How did customer find out about the retail store	N
Join Loyalty	Tick checkbox if customer would like to join store loyalty program	N
Loyalty Joined On	Self-explanatory	N
Location	Location of registration of customer	N
Is Active?	Tick checkbox if customer is active	N
Mobile Number	Self-explanatory	N
Address	Self-explanatory	N
City	Self-explanatory	N
Postal Code	Self-explanatory	N
State	Self-explanatory	N
Country	Self-explanatory	N
Phone1	Self-explanatory	N
Phone2	Self-explanatory	N
Fax	Self-explanatory	N
Email	Self-explanatory	N
Website	Self-explanatory	N

# Create New Retail Customer

1. Click on **"Customer Details"** tab at the bottom of screen
2. Fill up customer's information
3. Click **"Save"** button at the bottom of screen when done. The created retail customers will be available for selection in the Point of Sale Entry (Cash Register).
4. Click **"Create New"** button to create another retail customer record

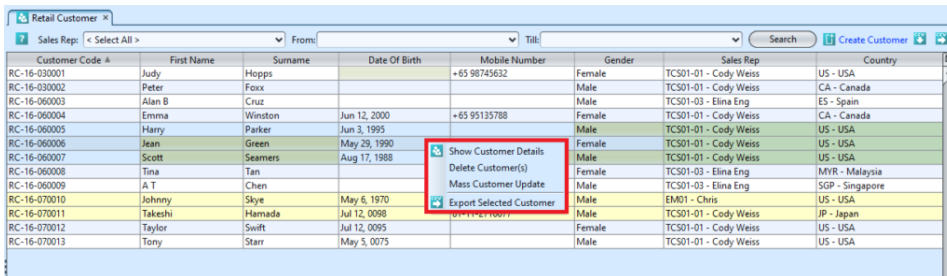
The screenshot shows a web-based form for creating a new retail customer. The form is titled "Retail Customer" and is divided into several sections. The top section contains fields for Customer Code (RC-16-070010), First Name (Johnny), Surname (Skye), Gender (Male), Date of Birth (06/05/1970), Country (US - USA), Sales Rep (EM01 - Chris), How do you know about us? (Walk in), Loyalty Joined On (18/07/2016), Location (TCS001-CR03 - TCS Macpherson - Cash Register 03), and Is Active? (checked). Below this is a "Contact Info" section with fields for Mobile Number, Address (California, USA), City, Postal Code, State, Country (US - USA), Phone1, Phone2, Fax, Email, and Website. At the bottom of the form, there are four buttons: "Create New", "Save", "Revert", and "Delete". The "Create New" and "Save" buttons are highlighted with red boxes.

# Update Retail Customer Details

1. Click on **"Customer List"** tab at the bottom of screen
2. Double click on customer to be updated, it will bring up **"Customer Details"** tab for the selected customer
3. Make change(s) on the customer's information
4. Click on **"Save"** button at the bottom of screen when done
5. Click on **"Revert"** button at the bottom of screen

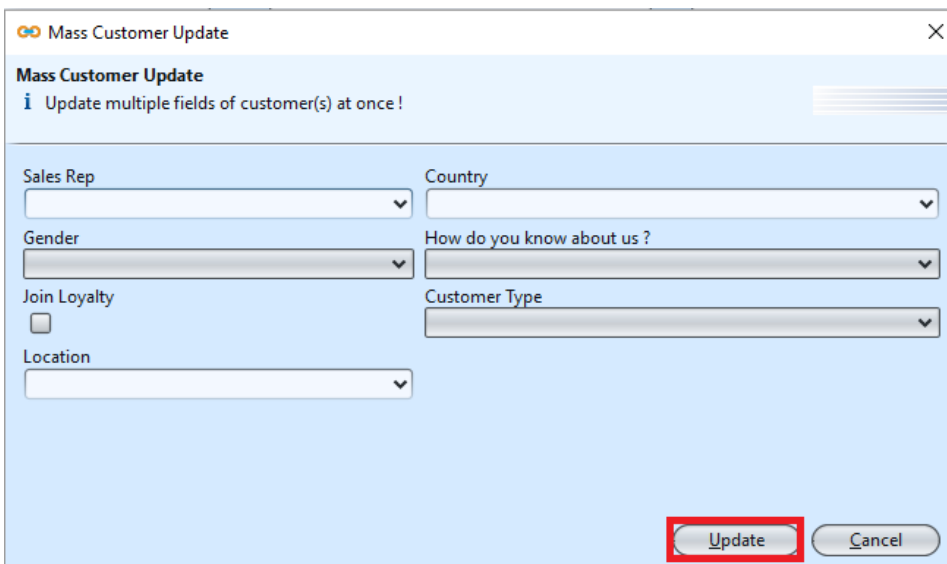
or refresh icon at the top of the screen to roll back the changes.

6. User can do mass update of retail customer records from the list view. Select multiple lines in the list view and right-click mouse to show more options. Select **“Mass Customer Update”** and choose which data field to update for the selected records. Click **“Update”** button to proceed with the update.



The screenshot shows a table of retail customer records. A context menu is open over a row, with the 'Mass Customer Update' option highlighted. The table columns are: Customer Code, First Name, Surname, Date Of Birth, Mobile Number, Gender, Sales Rep, and Country.

Customer Code	First Name	Surname	Date Of Birth	Mobile Number	Gender	Sales Rep	Country
RC-16-030001	Judy	Hopps		+65 98745632	Female	TCS01-01 - Cody Weiss	US - USA
RC-16-030002	Peter	Fox			Male	TCS01-01 - Cody Weiss	CA - Canada
RC-16-060003	Alan B	Cruz			Male	TCS01-03 - Elna Eng	ES - Spain
RC-16-060004	Emma	Winston	Jun 12, 2000	+65 99135788	Female	TCS01-01 - Cody Weiss	CA - Canada
RC-16-060005	Harry	Parker	Jun 3, 1995		Male	TCS01-01 - Cody Weiss	US - USA
RC-16-060006	Jean	Green	May 29, 1990		Female	TCS01-01 - Cody Weiss	US - USA
RC-16-060007	Scott	Seamers	Aug 17, 1988		Male	TCS01-01 - Cody Weiss	US - USA
RC-16-060008	Tina	Tan			Female	TCS01-03 - Elna Eng	MYR - Malaysia
RC-16-060009	A T	Chen			Male	TCS01-03 - Elna Eng	SGP - Singapore
RC-16-070010	Johnny	Skye	May 6, 1970		Male	EM01 - Chris	US - USA
RC-16-070011	Takeshi	Hameda	Jul 12, 0098		Male	TCS01-01 - Cody Weiss	JP - Japan
RC-16-070012	Taylor	Swift	Jul 12, 0095		Female	TCS01-01 - Cody Weiss	US - USA
RC-16-070013	Tony	Starr	May 5, 0075		Male	TCS01-01 - Cody Weiss	US - USA



The screenshot shows the 'Mass Customer Update' dialog box. It contains several dropdown menus for selecting fields to update: Sales Rep, Country, Gender, How do you know about us?, Customer Type, and Location. There is also a checkbox for 'Join Loyalty'. The 'Update' button is highlighted with a red box.

## Delete Retail Customer

1. Click on **“Customer List”** tab at the bottom of screen

2. Double click on customer to be deleted, it will bring up **“Customer Details”** tab for the selected customer

3. Click on **“Delete”** button at the bottom of screen

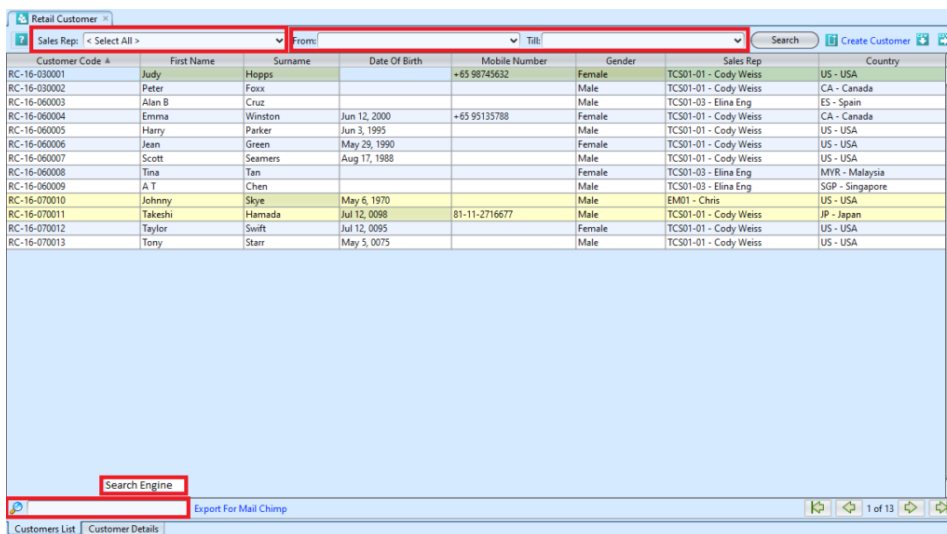
4. Click on **“Yes”** button on the pop-up window to confirm record deletion.

## View and Search for Retail Customer Details

1. Click on **“Customer List”** tab at the bottom of screen

2. Enter search parameter to filter the result, i.e. type in name of the sales representative in the **“Sales Rep”** textfield box or select from drop-down list

3. Result can be sorted alphabetically by clicking the fields' columns





Customer Code #	First Name	Surname	Date Of Birth	Mobile Number	Gender	Sales Rep	Country
RC-16-030001	Judy	Hopps		+65 98745632	Female	TCS01-01 - Cody Weiss	US - USA
RC-16-030002	Peter	Foxx			Male	TCS01-01 - Cody Weiss	CA - Canada
RC-16-060003	Alan B	Cruz			Male	TCS01-03 - Elna Eng	ES - Spain
RC-16-060004	Emma	Winston	Jun 12, 2000	+65 95135788	Female	TCS01-01 - Cody Weiss	CA - Canada
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RC-16-060008	Tina	Tan			Female	TCS01-03 - Elna Eng	MYS - Malaysia
RC-16-060009	A T	Chen			Male	TCS01-03 - Elna Eng	SGP - Singapore
RC-16-070010	Johnny	Skye	May 6, 1970		Male	EM01 - Chris	US - USA
RC-16-070011	Takeshi	Hamada	Jul 12, 0098	81-11-2716677	Male	TCS01-01 - Cody Weiss	JP - Japan
RC-16-070012	Taylor	Swift	Jul 12, 0095		Female	TCS01-01 - Cody Weiss	US - USA
RC-16-070013	Tony	Starr	May 5, 0075		Male	TCS01-01 - Cody Weiss	US - USA

Inactive retail customer records will be highlighted in yellow in the list view.

Customer Code #	First Name	Surname	Date Of Birth	Mobile Number	Gender	Sales Rep	Country
RC-16-030001	Judy	Hopps		+65 98745632	Female	TCS01-01 - Cody Weiss	US - USA
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RC-16-070010	Johnny	Skye	May 6, 1970		Male	EM01 - Chris	US - USA
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RC-16-070013	Tony	Starr	May 5, 0075		Male	TCS01-01 - Cody Weiss	US - USA

4. Double click on customer to view full details of the customer, it will bring up **“Customer Details”** tab for the selected customer

## Import and Export of Retail Customer Data

1. Click on **“Customer List”** tab at the bottom of screen
2. Click **“Export to CSV”**  button to export listed retail customer data, user can filter the list to only show data to be exported.
3. Click **“Import from CSV”**  button to import retail customer data. Use **“Export to CSV”** feature to get the file template with example.

Retail Customer

Sales Rep: < Select All > From: Titl: Search Create Customer

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RC-16-030001	Judy	Hopps		+65 98745632	Female	TCS01-01 - Cody Weiss	US - USA
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RC-16-060008	Tina	Tan			Female	TCS01-03 - Elina Eng	MYR - Malaysia
RC-16-060009	A T	Chen			Male	TCS01-03 - Elina Eng	SGP - Singapore
RC-16-070010	Johnny	Skye	May 6, 1970		Male	EM01 - Chris	US - USA
RC-16-070011	Takeshi	Hamada	Jul 12, 0098	81-11-2716677	Male	TCS01-01 - Cody Weiss	JP - Japan
RC-16-070012	Taylor	Swift	Jul 12, 0095		Female	TCS01-01 - Cody Weiss	US - USA
RC-16-070013	Tony	Starr	May 5, 0075		Male	TCS01-01 - Cody Weiss	US - USA

Export For Mail Chimp

Customers List Customer Details 1 of 13

4. User can also export the retail customer data for Mail Chimp using “Export for Mail Chimp” feature.