Customer Records

Customer Services

Sparkstone Technology Ltd

Contents
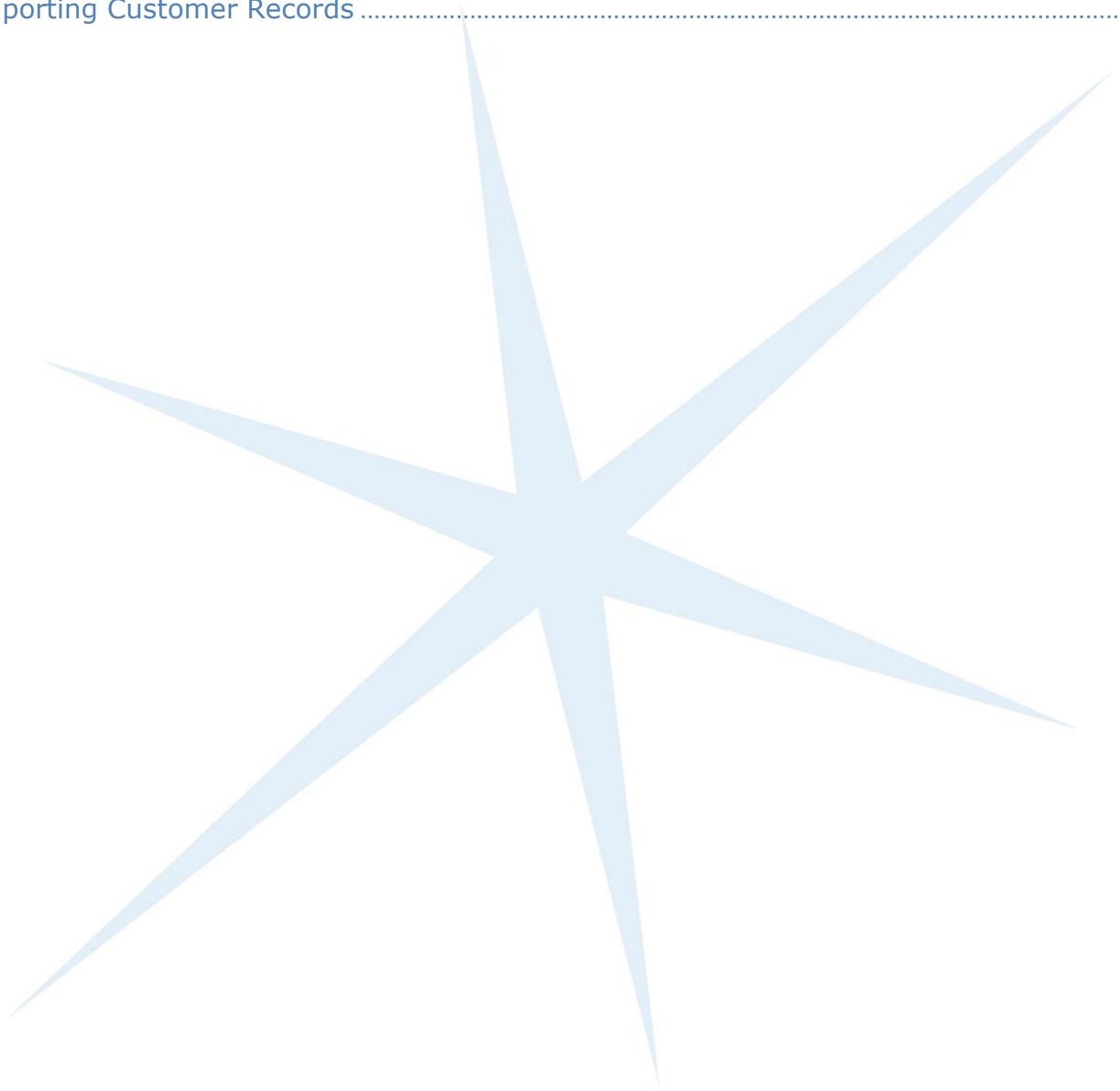
Introduction

This document outlines the workflow for the creation of customer records within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

Objectives

To provide an overview of the processes involved in creating new customers & navigating the customer record window.

Conventions Used

Menu paths will be indicated throughout this training manual in bold.
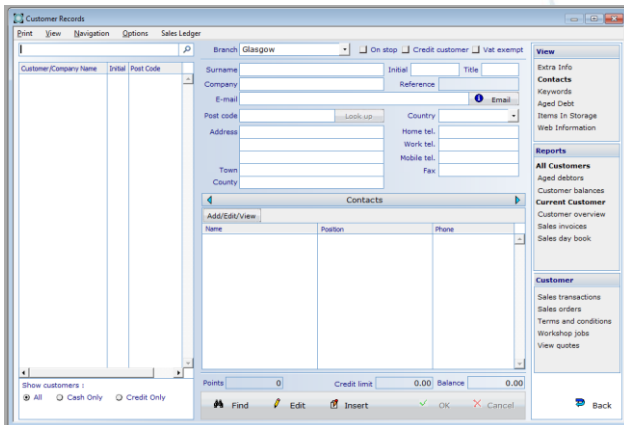
For example:

Back Office | Product file | Stock Records

Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.
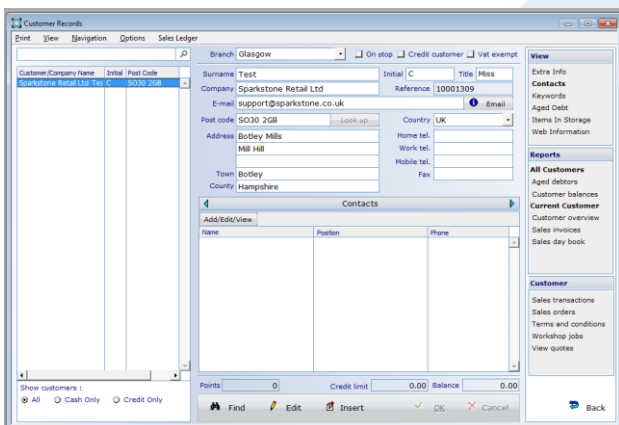
Creating Customer Records

Creating Customer Records

Users can be setup by going to the **Back Office | Sales Management | Customers:**

To create a new user, Press 'Insert' and type in the contents of the customer card by tabbing through the fields. Then press 'OK' when complete. For example:

Using the navigation column on the right hand side, there are various selections which lead to new information being populated in the second half of the window.

View

-*Extra Info*- Looking at email, telephone, fax and text preferences, customer group is listed here, sort keys and accounts update codes.

-*Contacts*- Additional contact information can be listed here- especially if they are a web customer.

-*Keywords*- A list of automatically generated keywords based on the contents of the customer card.

-*Aged Debt*- Looking at the status of the account in terms of aged debt bandings and any money owed.

-*Items in Storage*- Items stored against the customer record.

-*Web Information*-If the customer is active online the details will show here.

Reports

-**All Customers**-: -*Aged Debtors*- A report showing the aged debtor breakdown as in the aged debt window.

-*Customer balances*- A report showing an overview of the customer balance.

-**Current Customer**-: -*Customer Overview*- A report showing an overview of sales.

-*Sales Invoices*- A summary of the invoices against the account.

-*Sales day book*- A summary of the sales day book showing payments and orders.

-Statement (if a credit customer)- Statements of the customer's account can be printed here.

Customer

-*Sales Transactions*-A list of all of the sales transactions made against the customer record.

-*Sales Orders*- Outstanding sales orders.

-*Terms and Conditions*- The agreement terms and conditions are listed here.

*(If the workshop module is active):*

-*Workshop Jobs*- Linking to the workshop management window to see the workshop jobs assigned to the customer.

*(If the quote management module is active):*

-*View Quotes*- Linking to the quote management window to see the quotes listed for the customer.

Importing Customer Records

To import a large number of customer records at a time, the import/export utility can be used. Go to **Back Office | System Control | Utilities | Import/Export Utility:**
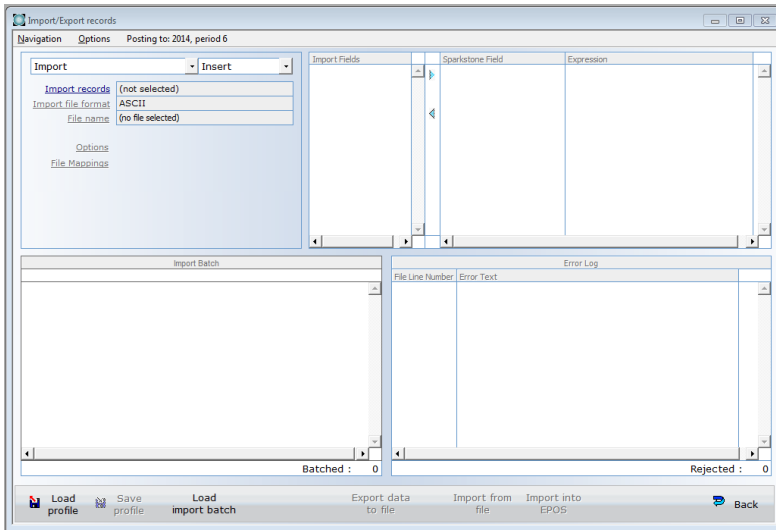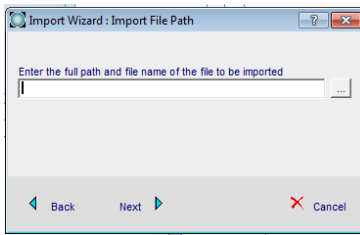

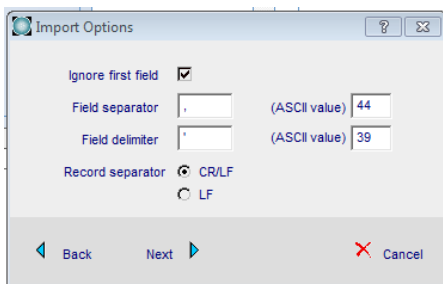Click on the link 'Import records' and the following window will be displayed:
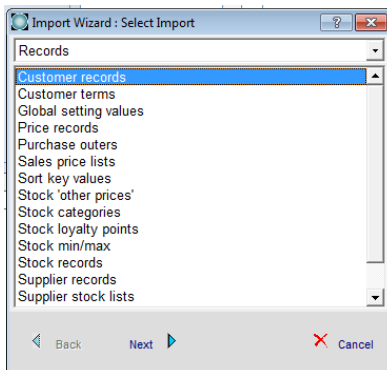
Keep the line 'Customer records' selected and click 'Next':

Keep the radio button selected to 'ASCII' and click 'Next':

Select the '…' button to select the .txt. or .csv file to import from. Go through the path to locate the file and click 'open':


Keep the field separator the same and press 'Next'. A preview of the data to be imported will be shown. If all of the fields are joined together in the preview, go back and put the cursor in the 'field separator' box and press 'tab'. For example:
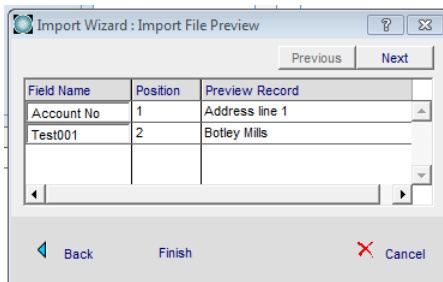
Then press 'Finish' and the following window will be displayed:
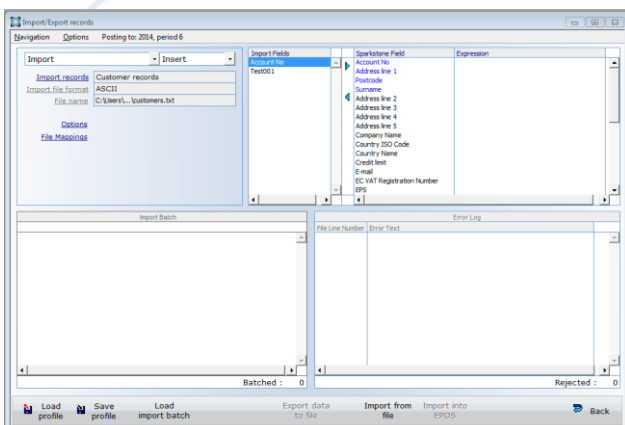
Map the fields across from the left to the right highlighting the left line, then the right and clicking the '>' arrow. If the customer records are not in the system, keep the drop down as 'insert'. If it is already in the system and the data is being updated, toggle the drop down to 'Update':

Insert ▾
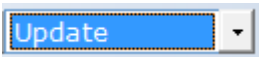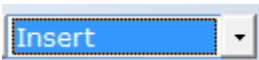
Update ▾

If selecting 'Update' the mappings on the right hand side will change.

Once the fields have been mapped, select 'Import from file' and the import batch will show in the bottom left hand corner of the screen:
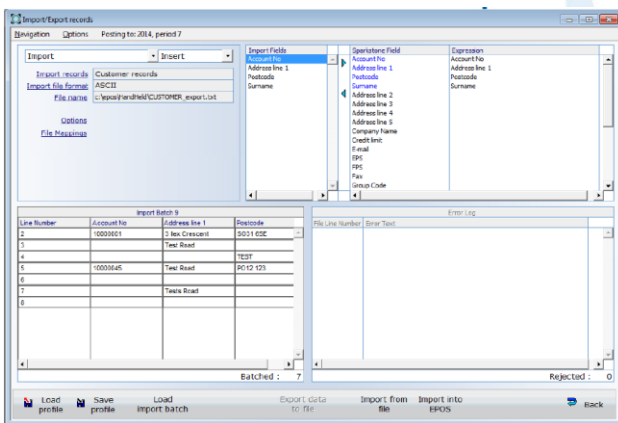
When happy, select 'Import into Epos' and the data will upload into the database.