

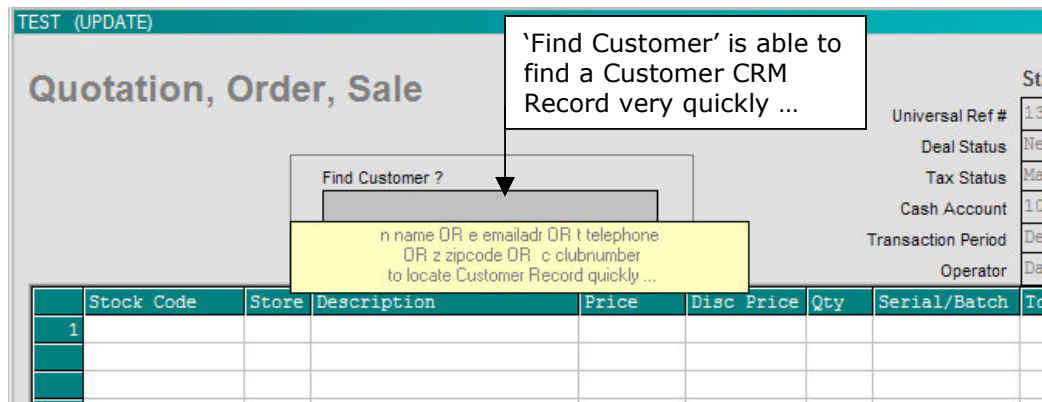
LOCATING THE CUSTOMER RECORD

Introduction

Why is it important to understand how to locate the Customer Record? Well, for all Retail Deals, unless the Deal is anonymous, it is important to the Business to track the details on the Customer Relationship (CRM) Record. Also, once a Customer Account (or Club Card) is present on the Deal, the system may be able to offer specific Pricing accordingly. Therefore, the 1st Field on a Retail Screen is 'Find the Customer'.

How to best locate the Customer Record

When the Retail Screen is opened, the cursor is on the 'Find Customer' Field. For instances where there is no need to retrieve a Customer Record, you may simply press ENTER or TAB to advance to the next Data Field. In setups where there is NEVER a need to retrieve the Customer Record, this Field may be removed from the Retail Screen(s). With the exception of Retail environments where the majority of Sales are anonymous, it is recommended that the Customer Relationship Management (CRM) functionality, which is integrated with Retail, be used. The explanations following here is intended for all cases where CRM is in use.



Retail, CRM and Financial Accounts are all integrated. If the Customer has a CRM Record with us, then the system will also know if there is a linked Accounts Receivable (AR / Debtor) Account for the same Customer (or multiples of, possibly in different Currencies). By retrieving the correct Customer Record when doing a Retail Screen, the system is able to record the necessary events and history, PLUS it is able to automatically connect to any Contract Prices, Club Discounts and / or other related Retail parameters.

A Customer CRM Record is cross referenced by the system in a number of ways, and therefore the Record may be retrieved based on any of the cross references applied, which is much quicker than searching the entire Customer File on specified criteria, although the latter method may still be used when necessary.

When the cursor is on 'Find Customer', the following methods for locating an existing CRM Record, or defining a NEW one, are available: -

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Find it on the Family Name (for Individuals) or the Company Name (for Corporate Customers) –

n Bush

This format will search for Name=Bush;

Find it on a Telephone number –
t 65 23456

This format will look for a Telephone Number that includes the digits '6523456';

Find it by Zip / Postal Code –

Z 4476

This format will look for zip=4476;

Find it by e-mail address –

e rolandw@comcast.net

This format is often the fastest, since e-mail addresses are unique, i.e. only 1 of;

Find it by Club Number –

c 8722365

As fast as e-mail retrieval, since the Club Number is also unique.

Find it by multi-method –

T

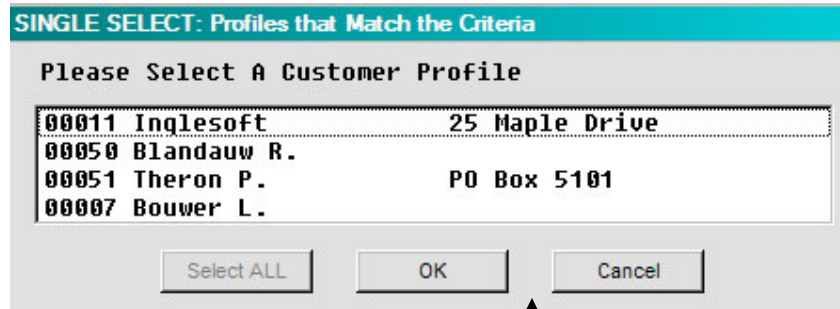
Here you just type 1 or more characters, and based on that, the system searches for Names that match. If no results are found, the system continues to search on the Telephone, e-mail, Club Number and Zip Codes cross references. This is the easiest way to initiate a search by the system to find the desired Customer Record.

Note: In this method, i.e. without key character lead-in, the typed string will in the 1st instance be checked to see if it is a valid Customer Account (AR) Code. If it is not, the system searches for Names, Telephone, etc.

There are 2 remaining options to discuss, but we need to make a few points about the methods already mentioned above. In all of the above methods, it is necessary to note that we use cross-references to locate the Customer Record as fast as possible. In each case except the last, we use a 'key' letter to indicate the type of information that follows, e.g. a Name search starts with 'n' and is followed by a Name, e.g. 'n ABC Company'. Secondly, there is no concept of wildcards with this search type, i.e. it is necessary to give the full Name, e-mail address, Club Number, etc., (except for the multi-method). Finally, the searches shown above are NOT case sensitive, i.e. it is irrelevant whether upper or lower case characters are used.

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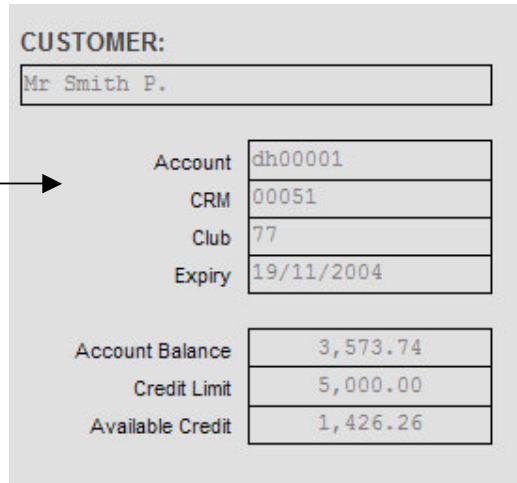
If the system finds no results for the search, it does not return a Customer Record, and you can search again on another criterion. If the system finds a single result, it assumes that to be the correct Record, and returns it. If the system finds multiple results, it offers a list with the 1st 100 results, and you may select from the list.



In the above example, there are 4 Search Results, and the system offers the list for you to choose from. If the correct Record is not present, you may choose CANCEL and search again ...

Once a Customer Record has been found or selected, the system automatically populates the Retail Screen with relevant Customer information.

This is a part of the Retail Screen, where Customer Information is displayed.



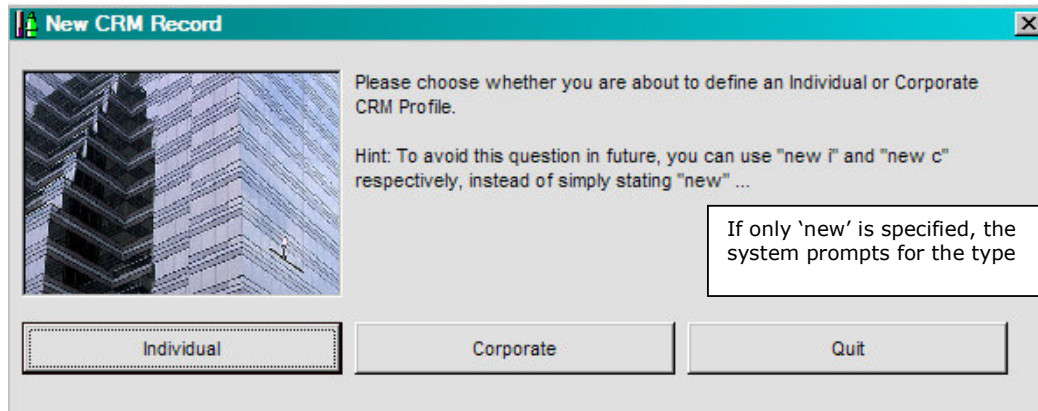
A final note on Telephone Numbers: They are cross referenced in INFOLAB based on all the Digits specified on the CRM Record, ignoring spaces and other characters. When searching, the system will do the same. Therefore, if the telephone number was originally captured as '+27 12 335 7622' and during a search this is specified as '2712 3357622', it will be interpreted as the same thing. However, if '27' is a country code, and at the time of searching it is not specified, i.e. only '12 335 7622' is specified, the system will not find it on the Cross Reference method. For reasons like these, it is fairly important to standardize on a method for capturing Telephone Numbers, and INFOLAB will

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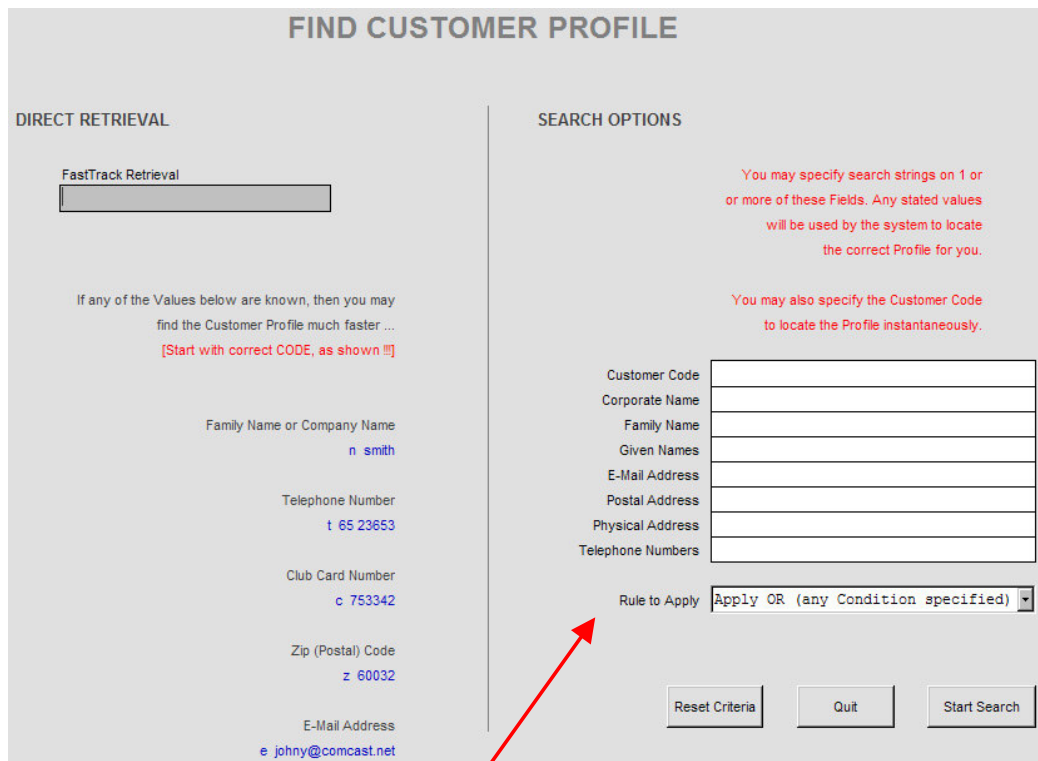
allow you to customize your Telephone Number Validations and Cross Referencing to suit your local preferences.

The 2 remaining options that may be used on the 'Find Customer' field are 'new' and 'find'.

'new' is the keyword to use when there is no Customer CRM Record on File yet, and a new CRM Record needs to be established now. NEW may be specified as 'new i' or 'new c', for new Individuals or new Corporate Records, respectively. If only 'new' is typed, the system will prompt for a decision as to which type of new CRM Record is being established, before opening the appropriate Screen.



The 'find' option is used when the fast-track Cross Reference search methods will not suffice.



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FIND opens the full CRM Search function, which includes the functionality already discussed above, but, in addition, offers you options to use multiple search criteria, and the option to use wildcards. However, the 'full' search will search indexes on the CRM File, and this method will certainly take a moment longer to find the Record you are looking for.

When the 'full' search function is opened, you may use fast track searching (on the left hand side), or full searching with 1 or more criteria, which may optionally include wildcards.

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