RMS POS Add In - Global Customer Edit

Overview

This POS add in allows for editing of customer address and email information from a custom button for the current active customer in the current transaction. Edits will apply to both Global and Local customers. Global customer changes will be changed directly in the local store database as well as the Headquarters database. Only customers with selected Account Types may be edited.

Usage

A global customer must be assigned in the current transaction. Local customers may be edited in the standard RMS screens.

The customer edit may be opened by pressing the



If the customer Account Type is one of the account types assigned in the setup program the edit screen will be displayed.

The following fields will be available for edit:

First Name		TA Edit Customer 1	Information					x
Last Name (Name	only in Ship To)	Account Number:	(3045)	Name	Address	Telephone	Fax Number	I.
Company	*	Address:	Address 1	Ship To Address 2	*****			
Address	*	Address 2:	Address 2	-				
Address 2	*	City:	Oty	-				
City	*	State	State					
State	*	Zip/Postal Code:	Zp	-				
Country	*	Phone Number:	[
Zip/Postal	*	Fax Number: Email Address	888-999-0000	-				
Phone Number	*	Oustom Text 1	<u>i</u>					
Fax Number	*	Custom Text 2 Custom Text 3	1	-				
Email Address	*	Custom Text 4	<u> </u>					
CustomText1		Custom rext 5						
CustomText2			Cancel					1
CustomText3								
CustomText4								

Existing Global Ship To addresses may also be edited.

Fields marked above with * will be available for edit in the main customer information as well as the Ship To editing.

New customers and new Ship To addresses must be entered in the standard screens.

Any updates will immediately update in both the local store and HQ database (in cases where the customer is global). Updates made in HQ will then migrate to other stores during data uploads (401 worksheets).

CustomText5

Installation

Right-click on the "GlobalCustomerEditSetup-x.x.x.x.exe" program and select Run as Administrator. Keep all default settings to install. At the end of the installation you may proceed directly into the setup options by selecting "Launch Global Customer Edit" option prior to pressing Finish. Once installed, the setup may also be accessed in Store Operations Manager \rightarrow Utilities \rightarrow Add-Ins \rightarrow

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Setup

A configuration program will be available to enter the RMS HQ Database connection info. Allowed Account Types may also be selected in the configuration.

SQL database ports may need to be opened for port-forwarding at the Headquarters level in order to allow access from external stores. These ports will be determined based on the SQL Database

Gerver Name	ServerName	Customer account types allowed to edit:
Jatabase Jser name Password	HQDatabaseName	 ✓ 30 Days ✓ 60 Days ✓ 90 Days ✓ Revolving
limeout	30 seconds	

Engine setup. A manually added Custom Button must be added in order to access this feature.

The software must be licensed on each POS terminal to be operational. Refer to the end of this guide for licensing.

Creating the Custom Button for POS (once per store)

Open Store Operations Manager

- Select \rightarrow Database
 - \rightarrow Registers
 - \rightarrow Customer POS Buttons
 - ➔ Select New

Custom Button Properties: -1		×
Image:	<u>N</u> umber: <u>S</u>	ityle: COM Object (Session Object) 💌
	C <u>a</u> ption:	
EDIT CUSTOMER	Co <u>m</u> mand: GlobalCustomerEditA	ddin.CustomButton
	Description:	
🔽 Use Mask Color		
Load	OK	Cancel Help

Number: Style: Caption:	Enter an available sequence number for the button Com Object (Session Object) EDIT CUSTOMER (leave blank if loading the button image		
Button Image:	EDIT CUSTOMER	(image is available in the installation folder)	
Style: Command: Description:	Com Object (Session Object) GlobalCustomerEditAddin.Cu Enter a detailed description of	istomButton of the button or leave blank	

To Obtain a License

Press the **Program License** button on the main menu screen.

A box beside the License Code will inform you if the product is licensed or not.

A unique Auto-generated License ID will be displayed. Provide this unique Auto-generated License ID to Tri-City Retail Systems to obtain a **License Code**.

Once you have obtained your license code from by Tri-City Retail Systems, enter the code in the **License Code** field then press the **Validate** button. A message will be displayed indicating if the license is validated.

If your license is validated successfully, press the Close button.

The software is licensed on this device only, not for any particular Store Operations database.

Contact Tri-City Retail Systems for all licensing request.

Tri-City Retail Systems Inc.

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99999999999999999	99999999
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