

# 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 **EDIT CUSTOMER** button.

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
- Last Name (Name only in Ship To)
- Company \*
- Address \*
- Address 2 \*
- City \*
- State \*
- Country \*
- Zip/Postal \*
- Phone Number \*
- Fax Number \*
- Email Address \*
- CustomText1
- CustomText2
- CustomText3
- CustomText4
- CustomText5

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.

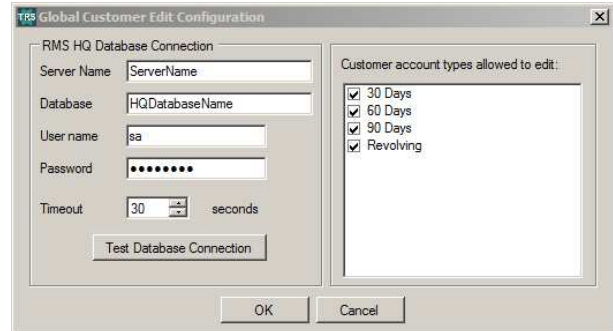
Any updates will immediately update in both the local store and HQ database (in cases where the customer is global). Updates made in HQ will then migrate to other stores during data uploads (401 worksheets).

## 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 → Utilities → Add-Ins → Global Customer Edit AddIn.

## 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.

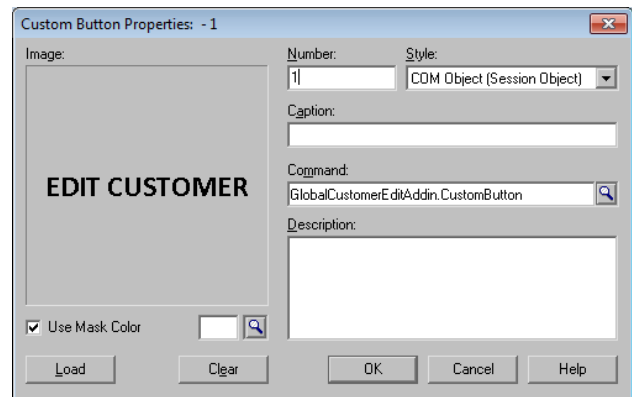


SQL database ports may need to be opened for port-forwarding at the Headquarters level in order to allow access from external stores. These ports will be determined based on the SQL Database Engine setup. A manually added Custom Button must be added in order to access this feature.

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 → Database
- Registers
- Customer POS Buttons
- Select New



Number: Enter an available sequence number for the button  
 Style: Com Object (Session Object)  
 Caption: EDIT CUSTOMER (leave blank if loading the button image)

Button Image:  (image is available in the installation folder)

Style: Com Object (Session Object)  
 Command: GlobalCustomerEditAddin.CustomButton  
 Description: Enter a detailed description of the button or leave blank

