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Category	BOS General
Course	AR
Version	1.0
Client	Generic
Software	2.15.2





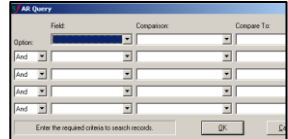
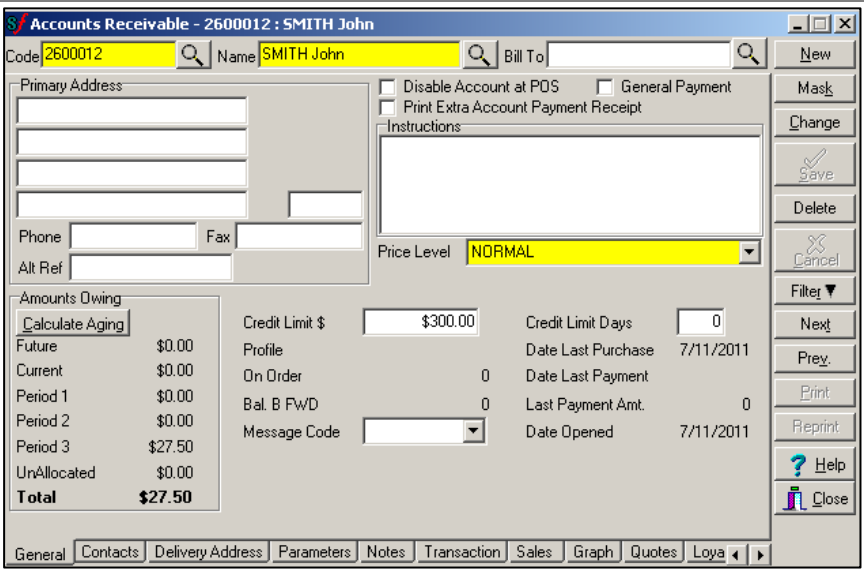
Hints and Tips

- ✓ To edit **loyalty points** and **vouchers**, refer to the [BGEN-2e Maintain Loyalty Account Activity Fact Sheet](#).
- ✓ If you search for an account, select **Contains** if you perform a multiple word search; it will return all customers who contain all the words anywhere in the selected field.
- ✓ **Profile** on the **General** tab is a system-generated sequence that's updated once the account is matured. Each code represents a transaction and the period incurred; Future, Current, 30 (period 1), 60 (period 2), and/or 90 (period 3).
- ✓ Use the **Contacts** tab to record:
 - additional phone contacts
 - the customer's birthday
 - the secondary accounts linked to this account.
 Comments don't display in SUREfire.
- ✓ Use the **Notes** tab to record comments about the account; these don't display in SUREfire.

Maintain a Customer Account

You can maintain all the parameters in a customer account. If your store is Head Office managed, check your business's policy on making changes at store level.

Procedure to Maintain a Customer Account








<p>1. From the HOS/BOS Receivables menu, select Accounts. <i>*Or click the Accounts Receivable icon.*</i></p>	
<p>2. To: retrieve a specific account</p> <hr/> <p>then: in the Code field, type, or click , to search for the account number. <i>*The account details are displayed.*</i></p> <hr/> <p>retrieve only accounts that match your search criteria</p> <p>click . Click Set. Select the criteria to search by. <i>*Common searches include: Bill To Account (equal to the Primary Account code), Amount Owing 90+ greater than \$x.xx so you can stop their line of credit.*</i> Click OK. <i>*The first matching account is displayed.*</i> Click Next and Prev to see each matching account returned.</p>	 
	

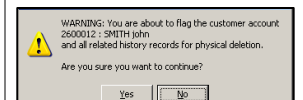
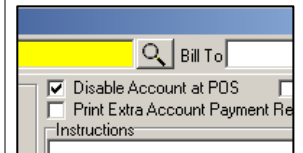
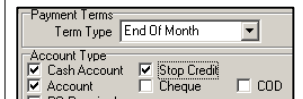
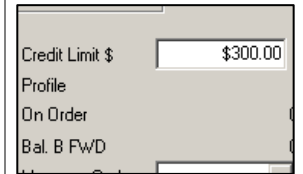
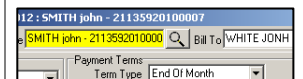
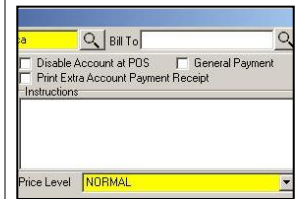
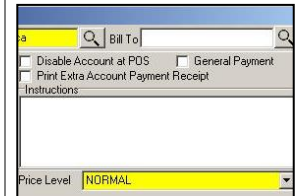
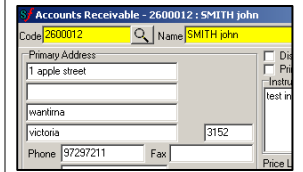
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Hints and Tips

- ✓ POS must be configured to display **Instructions**.
 - This is set in the POS Config **System** menu -> **Location Setup** -> **Configure** -> **Account** tab -> **Account** tab -> **Display Instructions** check box.
- ✓ Use the **Bill To** field to link several members of the same family or organisation to one (primary) account that accrues all loyalty and sales history.
 - The total points and spend for the secondary account is maintained for reference
 - Apply a **filter** at step 2 to identify all the accounts linked to the primary account.
- ✓ The **Print Extra Account Payment Receipt** check box is usually only used if your POS isn't configured to automatically print a duplicate customer receipt for every account when they make a payment.
- ✓ Once a customer spends up to their **credit limit**, a message displays at POS when they next try to purchase on account. Supervisor approval is required to allow the purchase on account.
 - The **Credit Days** field isn't used; the payment terms are set on the **Parameters** tab.
- ✓ A **disabled account** can't be added to a transaction at POS (an error displays); this also prevents them from redeeming any issued loyalty vouchers.
 - The error message at POS is set in **System** -> **Location setup** -> **POS config** -> **Messages** tab (blocked customer message).
- ✓ A **Deleted account** won't be recognised in SUREfire once the physical deletion utility runs and the update has applied at POS.
 - You can't **delete an account** if it has outstanding **laybys**.

3. Complete the required steps to manage the account parameters:

To:	then:
edit the customers contact details	click the General tab. Change the applicable details. Click  . *Email is recorded on the Parameters tab.*
add instructions that display on the POS operator screen	click the General tab. In the Instructions box, type the comments. Click  . *See Hints and Tips.*
make this a secondary account linked a primary account	click the General tab. In the Bill To field, select the primary account. Click  . *The primary account is displayed, updated with any current loyalty points from the secondary account.* *The secondary account has the primary account code at the end of its Name.*
set a credit limit against the account *See Hints and Tips.*	click the General tab. In the Credit Limit \$ field, type the maximum amount that can be purchased on account. Click  .
freeze the line of credit for an 'Account' type customer *so they can't buy on account*	click the Parameter tab. Select the Stop Credit check box. Click  .
temporarily stop an account from being used at POS *See Hints and Tips.*	click the General tab. Select the Disable Account at POS check box. Click OK to confirm. Click  .
delete the account *See Hints and Tips.*	click the Parameter tab. Click  . Click Yes . *The account is flagged as physically deleted.*



Hints and Tips

- ✓ **SUREfire loyalty/rewards** can include the following features:
 - **Price level promotions** created in the Stock record, which are only available to customers who either present a specific type of card, or have an AR account linked to the price level (refer to the [TECH-4d Configure Special Customer Pricing Fact Sheet.](#))
 - **Customer Groups** who receive special **discounts** when they present a specific type of card, or have an AR account linked to the group (refer to the [TECH-4c Configure Customer Groups Fact Sheet.](#))
 - A **points rewards** scheme that are either redeemed for store vouchers, or donated to a selected charity (refer to the [TECH-2l Configure a Loyalty Points Program Fact Sheet.](#))
 - A **percentage-off discount** on every sale. Your business may have configured certain departments to be excluded from receiving a discount.
 - **Off Cost** is a percentage added to the cost price.
 - **Off retail** is a percentage taken off the retail price.
 From version 2.14, the Discount Wizard function has a **Staff discount** offer that you may prefer to use, as it provides more options around what products are discounted.
- ✓ If you **Stop Loyalty**, POS will still issue any voucher/s that the customer had already earned before you set this status.

<p>4. Complete the required steps to manage the customers rewards: <i>*Some reward options must be configured first; see Hints and Tips.*</i></p>	<table border="1"> <tr> <td style="vertical-align: top;">To:</td> <td style="vertical-align: top;">then:</td> </tr> <tr> <td>add the customer to a promotional group</td> <td>click the General tab. Select the Price Level the customer will belong to. Click .</td> </tr> <tr> <td>remove the customer from a promotional group</td> <td>click the General tab. Select the Price Level option Normal. Click .</td> </tr> <tr> <td>add the customer to a customer group (they can belong to multiple groups)</td> <td>click the Loyalty tab. Click Add. Click Search to list all groups that exist. Select the applicable group. Click Select. <i>*The group is listed against the account.*</i></td> </tr> <tr> <td>remove the customer from a customer group</td> <td>click the Loyalty tab. Select the group to remove. Click Remove. Click Yes to confirm.</td> </tr> <tr> <td>stop the customer from earning loyalty points (if offered by your business)</td> <td>click the Parameters tab. Click the Stop Loyalty check box. Click .</td> </tr> <tr> <td>give the customer a discount on every purchase (usually not used if you use customer groups)</td> <td>Click the Loyalty tab. Select the Status option Discount (Customer). In the Customer Discount % field, select & type the discount amount. Click .</td> </tr> </table>	To:	then:	add the customer to a promotional group	click the General tab. Select the Price Level the customer will belong to. Click .	remove the customer from a promotional group	click the General tab. Select the Price Level option Normal . Click .	add the customer to a customer group (they can belong to multiple groups)	click the Loyalty tab. Click Add . Click Search to list all groups that exist. Select the applicable group. Click Select . <i>*The group is listed against the account.*</i>	remove the customer from a customer group	click the Loyalty tab. Select the group to remove. Click Remove . Click Yes to confirm.	stop the customer from earning loyalty points (if offered by your business)	click the Parameters tab. Click the Stop Loyalty check box. Click .	give the customer a discount on every purchase (usually not used if you use customer groups)	Click the Loyalty tab. Select the Status option Discount (Customer) . In the Customer Discount % field, select & type the discount amount. Click .	
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Hints and Tips

- ✓ To **Print** or **Reprint** transactions, the **Parameter** tab -> **Invoice Layout** field must be set to **AUDLayout**, and the **System Param** -> **Reprint POS Invoices** set to **False**.
- ✓ To report on **loyalty details** and **account purchase analysis**, refer to the [BGEN-2e Maintain Loyalty Account Activity Fact Sheet](#) .
- ✓ The **Outstanding Account Balances report** is useful to provide to your accountant when they request the total amount outstanding on accounts at the end of the financial year.
 - **Important:** you must run this the morning after your EOP runs (e.g. 01/07/2012); don't wait any longer, because if the customer makes a payment the report total will be minus this amount - even though payment came after the balance date of the 01/07/2012.
 - If you miss this window, the only other way to get this value is to retrieve the account statements for the June period (from the **AR Printing Wizard** -> **Library Statements**), and manually add up all the totals.

<p>5.</p>	<p>Complete the required steps to review account activity:</p> <table border="1"> <tr> <td>To:</td> <td>then:</td> </tr> <tr> <td>view purchase history</td> <td>click the Transaction tab. Click a transaction in the top grid to display the item details below. Click to print the transaction grid, OR to print a single transaction.</td> </tr> <tr> <td>view payment history for an 'Account' type account</td> <td>click the Transaction tab. Click an AR Receipt in the top grid. <i>*The detail is displayed on the Accounting Details tab.*</i></td> </tr> <tr> <td>view loyalty points and voucher activity</td> <td>click the Loyalty tab. <i>*Refer to the BGEN-2e Maintain Loyalty Account Activity Fact Sheet to edit loyalty points or vouchers.*</i></td> </tr> </table>	To:	then:	view purchase history	click the Transaction tab. Click a transaction in the top grid to display the item details below. Click to print the transaction grid, OR to print a single transaction.	view payment history for an 'Account' type account	click the Transaction tab. Click an AR Receipt in the top grid. <i>*The detail is displayed on the Accounting Details tab.*</i>	view loyalty points and voucher activity	click the Loyalty tab. <i>*Refer to the BGEN-2e Maintain Loyalty Account Activity Fact Sheet to edit loyalty points or vouchers.*</i>					
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