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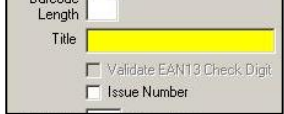|	
Category	Technical
Course	POS Config.
Version	1.0
Client	Generic
Software	2.14.100.0

Configure Customer Cards

Privilege cards, such as loyalty &fly buys, are configured in SUREfire so that POS recognises them as a valid card, and also applies any special pricing or discounts that are associated the card.

Hints and Tips

✓ A prefixed card can be scanned on the POS Item Menu, just like a product.
- If you don't perform this procedure, the only other way a card is recognised at POS is if the card number has been saved as the **Code** for an **AR account** (which is entered on the POS Customer ID Menu).

✓ There's specific best practices recommended for **staff and senior cards**. Refer to:
- TECH-2r Configure Senior Discount Fact Sheet
- TECH-2s Configure Staff Discount Fact Sheet.

✓ **Prefix**
- The prefix uniquely identifies what type of card it is.
- If more than one type of card is configured with a similar prefix (e.g. 277 and 2771), POS finds the card with the longer length prefix first.
- For store cards, use a prefix in the range 21 -> 29, whichever isn't being used for EAN's.
  - Perform a search on the **Stock** screen by EAN, to check which prefix is available; move to [3] or [4] digits if they're all in use.
  - Advise all users who register products that this prefix is now unavailable.

✓ If you enter a **Barcode Length,** POS will only accept the card if the card number exactly matches the specified length.
- You select the **Validate EAN 13 Check Digit** check box if it's an EAN13 format and you want the check digit to be verified against the EAN 13 coding standards.

Procedure to Configure Customer Cards

1.	As required, configure the **Pricing Level** that you want to associate to the customer card. *Refer to the Tech-4d Configure Special Customer Pricing Fact Sheet.* *You'll enter the pricing level at step 14.*	
2.	As required, configure the **Customer Group** you want to associate to the customer card. *Refer to the Tech-4c Configure Customer Groups Fact Sheet.* *You'll enter the customer group at step 14.*	
3.	From the HOS/BOS **System** menu, select **Location Setup.**	
4.	If a Head Office user, select the Location that you want to define. *You'll be defining the configuration for all stores at and below the level that you select.*	
5.	Double-click the **Configure** icon. *If a HOS user, click **Yes** to continue.*	
6.	Click the **Account** -> **Customer Card** tab.	
7.	Click [New]	
8.	In the **Prefix** field, type the first digits/characters of the card number that are used on every issue of this type of card. *The prefix can be any length.*	
9.	In the **Barcode Length** field, optionally type the length of the card number (including the prefix and any check digit). *Leave the field blank if the length is variable.* *if you type [13], select the **Validate EAN 13 Check Digit** check box if required.*	

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Hints and Tips

✓ **Strip First / Last Characters** define the account code number from the card number.
- E.g. card number 2012345, where [20] is the prefix. If you strip the first two digits, the account code is 12345.
- The card can still be scanned on the POS Item Menu, but if you need to search for the account (at POS or the BOS) you can only enter the code.

✓ The **Allow Unknown Customer** check box allows POS to accept a card with a valid prefix that's not in the AR database.
- This lets you issue a card to a new customer during the sale.
- Any rewards associated to the card apply in this transaction.

✓ **Pricing Privileges:**
- **Customer Level** is used to give a loyalty promotion or discount. Refer to the Tech-4d Configure Special Customer Pricing Fact Sheet.
- **Customer Groups** are used as criterion to trigger a discount. Refer to the Tech-4c Configure Customer Groups Fact Sheet.

✓ If you have **multiple cards** with differing privileges, a customer that uses multiple cards (e.g. loyalty and senior) receives the best promo and all eligible discounts.
- The transaction is recorded against the last **learned** card scanned; this is why senior discount isn't usually 'learned'.

✓ The **Learn Customer** check box:
- When an 'unknown' card is scanned at POS, the system creates an AR cash-account in the BOS with any privileges configured.
- Customers should complete a membership form, if you want to personalise the account.
- Note: If you have *existing* AR customers with account codes that start with the prefix being configured, they won't be updated with any pricing privileges being configured.

10.	In the **Title** field, type the description of the card type, e.g. 'Fly Buys'.	
11.	If required, select the **Issue Number** check box. *If used, this is the version of the card; it's a 2-digit code starting at position 3 in the card number.*	
12.	If required, in the **Strip First Characters** field, type the number of characters/digits that you don't want recorded in the account code. *Or leave blank; see Hints and Tips.* *If you selected **Validate EAN**, the **Strip Last Characters** is set to [1] to strip the check digit.*	
13.	If required, select the **Allow Unknown Customer** check box. * You must select this check box if an AR account won't be created before a card number is issued.*	
14.	Complete the applicable optional steps if you selected **Allow Unknown Customer**: • Select the **Customer Level** to apply. *This links back to what you set in step 1.* *The default is [0] – normal price.* • Type the **Customer Group** code to apply. *This links back to what you set in step 2.* *The default is blank – no customer group.* • Select the **Learn Customer** check box if you want an AR record created for the customer when a new card number is scanned at POS. *This means that either the account code or the card number can be entered at POS to receive any rewards linked to this card type.* *Click the **Prompt to Add Customer** check box if you want POS to display a confirmation screen for the operator to confirm whether they want an account added or not.*	
15.	If required, type a **Customer Message** to print at the end of the receipt; you can select it to only print for transactions equal to or more than an entered dollar value.	
16.	Click **OK** to save the card configuration.	
17.		

To:	then:
configure another card type	return to step 7.
finish	click **Save**. Click **Yes** to continue. Click **OK**. Click **Close** to exit Location Setup screen.

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Hints and Tips

✓ If you're a Head Officer user, the saved configuration is transmitted to the store/s when **HOS Export** and **HOS Import** are next run.

✓ The configuration is applied to the registers when **File Transfer** next runs (usually every few minutes).

Procedure to Edit Customer Card Configuration

1.	From the HOS/BOS **System** menu, select **Location Setup.**	
2.	If a Head Office user, select the Location that you want to define. *You'll be defining the configuration for all stores at and below the level that you select.*	
3.	Double-click the **Configure** icon.	
4.	Select the **Account** -> **Customer Card** tab.	
5.	**To:** / **then:** edit the parameters for a card — click **Edit.** Change any parameters as required. Click **OK.** Go to step 6. delete a card configuration — click **Delete.** If you deleted the wrong card, click **Un-Delete** *(the card configuration is only permanently deleted once you click **Save**).* Go to step 6.	
6.	Click **Save.**	
7.	Click **Yes** to continue.	
8.	Click OK.	
9.	Click **Close** to exit Location Setup screen.	
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