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Category	BOS General
Course	AR
Version	1.0
Client	Generic
Software	2.13.100

Hints and Tips






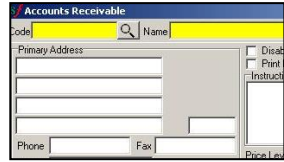

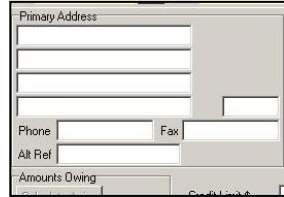



- ✓ Don't perform this procedure if your business uses privilege cards that *aren't* linked to AR accounts (the benefit is configured into the card prefix).
- ✓ **Seniors discount** is not usually created as an AR account. Refer to [TECH-2r Configure Senior Discount Fact Sheet](#)
- ✓ **Staff Discount** is usually set up as an AR account for each staff member, but there are specific best-practices recommended. Refer to [TECH-2s Configure Staff Discount Fact Sheet](#).
- ✓ The **Code** is added during a sale to identify the customer.
- ✓ If your business uses **prefixed privilege cards that are learned at POS**, all you need add is the customer's name and contact details to their account.
 - When the card was learned, SUREfire automatically created a cash account, and added any configured price level and/or customer group.
- ✓ Use the **Bill To** field to link several people to one (primary) account that accrues all loyalty benefits & sales history; this is also used to let customers **donate their loyalty points to a charity** instead of earning a voucher.
 - You enter the **primary account** in the **Bill To** field of each secondary account.
 - The **secondary accounts** will always have a zero current loyalty point's balance, but the total points and dollar spend history is maintained for reference.

New Cash-only Customer Accounts

Cash-only accounts are set up if your business offers:

- a privilege program (e.g. loyalty, mobile marketing), and wants to record customer's contact details & sales history
- certain customers or staff a percentage-off discount on every purchase; e.g. staff discount.

Procedure to Create a New Cash-only Customer Account

1.	<p>From the HOS/BOS Receivables menu, select Accounts.</p> <p><i>*Or click the Accounts Receivable icon.*</i></p>							
								
2.	<table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 50%;">If:</th> <th style="width: 50%;">then:</th> </tr> </thead> <tbody> <tr> <td>new customers are learned at POS by scanning a barcoded prefixed card</td> <td> in the Code field, type the card number off the membership form. <i>*Your system may strip the prefix and/or check digit when it creates the code.*</i> Press Enter. <i>*The account is displayed.*</i> </td> </tr> <tr> <td>your store creates all new accounts from the BOS</td> <td> click New. In the Code field, type an account number to identify the customer. <i>*You should set aside a range of numbers for this type of account; click  then Search if you need to find the last code assigned.*</i> </td> </tr> </tbody> </table>	If:	then:	new customers are learned at POS by scanning a barcoded prefixed card	in the Code field, type the card number off the membership form. <i>*Your system may strip the prefix and/or check digit when it creates the code.*</i> Press Enter . <i>*The account is displayed.*</i>	your store creates all new accounts from the BOS	click New . In the Code field, type an account number to identify the customer. <i>*You should set aside a range of numbers for this type of account; click  then Search if you need to find the last code assigned.*</i>	 
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3.	<p>In the Name field, type the customers surname & name (<i>maximum 40 characters</i>).</p> <p><i>*Enter name in the same order for every account.*</i></p>							
4.	<p>In the Primary Address section, type the customer's postal address and phone details:</p> <ul style="list-style-type: none"> • Number and street name on lines 1 and 2 • Suburb on line 3 • State on line 4 • Postcode in the adjacent field. 							
5.	<p>If applicable, next to the Bill To field, click  to search for & select the primary account you want to link this (secondary) account to.</p> <p><i>*The primary account code is added to the Name.*</i></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.
- ✓ **Price level promotions** are set up in the Stock record, and are only available to customers who present a specific type of card, or have an AR account linked to the price level (step 7) (refer to the [TECH-4d Configure Special Customer Pricing Fact Sheet.](#))
- ✓ 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.
- ✓ Other **Account Type** Options you can also select:
 - **Scan and Bag**: allows the customer to use a scan and bag trolley.
 - **Stop Loyalty** stops this account from accumulating loyalty points (if configured).The POS screen and customer receipt also won't show any point's related information.
- ✓ All other fields on the **Parameters** tab only apply to credit 'Account' type accounts.
- ✓ Use the **Notes** tab to record comments about the account; these don't display in SUREfire.

6.	If applicable, enter any Instructions that will display on the POS operator screen.	
7.	In the Price Level field, select the promotional level the customer belongs to. <i>* Defaults to Normal.*</i>	
8.	Click Save .	
9.	If applicable, click the Contacts tab and complete the optional fields; click Save . <i>*You must enter the First Name and Last name.*</i> <i>*Click New to add another blank row.*</i>	
10.	Click the Parameters tab.	
11.	In the Account Type section, select the Cash Account check box. <i>*This is automatically set for prefixed card accounts created at POS; POS also treats accounts as 'cash' if you don't select any Account Type.*</i>	
12.	In the Email Address field, type the customers email address if provided.	

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 present a specific type of card, or have an AR account linked to the price level (*added at step 7*) (refer to the [TECH-4d Configure Special Customer Pricing Fact Sheet.](#))
 - **A percentage-off discount** on every sale (step 15). 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.
 - **PREFERRED over the above AR % discount: Customer Groups** who receive **Discounts** (set up in discount wizard) when they present a specific type of card, or have an AR account linked to the group (step 16) (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.](#))
- ✓ If you're a Head Officer user, new accounts are transmitted to the store/s when **HOS Export** and **HOS Import** are next run.
- ✓ A new account is sent down to the registers when **File Transfer/POS Import** next runs (usually every few minutes).
- ✓ Run the **Receivables -> Listing -> Master File** report to obtain a list of all accounts, their address, and their loyalty (price) level; this displays all types of accounts (credit, cash only/loyalty etc).

13. Click Save .											
14. Click the Loyalty tab.											
15. Select the applicable option (ONE): <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">If:</td> <td style="width: 50%;">then:</td> </tr> <tr> <td>this customer will receive a discount off every sale (not used if you manage this via customer groups & discount wizard)</td> <td>select the Status option Discount (Customer). In the Customer Discount % field, select & type the discount amount.</td> </tr> <tr> <td>this is a loyalty customer/card</td> <td>select the Status option Discount (Loyalty Sales).</td> </tr> <tr> <td>this is a standard customer</td> <td>select the Status option None.</td> </tr> <tr> <td>your business runs a charity loyalty program</td> <td>select the Status option Charity. In the Charity field, select the customer's charity.</td> </tr> </table>	If:	then:	this customer will receive a discount off every sale (not used if you manage this via customer groups & discount wizard)	select the Status option Discount (Customer) . In the Customer Discount % field, select & type the discount amount.	this is a loyalty customer/card	select the Status option Discount (Loyalty Sales) .	this is a standard customer	select the Status option None .	your business runs a charity loyalty program	select the Status option Charity . In the Charity field, select the customer's charity.	
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16. If applicable, complete the following steps to add the customer to a Customer Group . a. Click Add . b. Click Search to list all groups that exist. c. Select the applicable group. d. Click Select . *The group is listed against the account.* *You can add them to multiple customer groups.*	 										
17. Click Save .											
18. To: create another account finish then: return to step 2. click Close .											