

Custom Fields for Customers

Introduction:

New feature added to Touch v9.1.014 to add a new 'Custom' tab to the customer screen. This will enable the ability to set up to 10 additional fields in the new Custom tab that can be defined to meet the individual end users requirements. Each field can accept up to 40 characters.

The screenshot shows the 'Customer Accounts' screen with the 'Custom' tab selected. The 'Code' field is set to '1' and the 'Name' field is 'Cust 50% Disc'. The 'Custom Fields' section contains the following data:

Model	iphone 6+
Imei	12155644651561666666
Network	o2
Unlock Code	6543
Item Number	555001
Password / Pin	12342
Fault	Screen Needs Replacing

Navigation buttons at the bottom include First, Prev, Next, Last, Delete, Save, and Cancel.

The new custom tab has also been added to the Customer Orders screen.

The screenshot shows the 'Customer Orders' screen with the 'Custom' tab selected. The 'Order Reference' field is '001-000012' and the 'Customer Code' field is '1'. The 'Name' field is 'Cust 50% Disc'. The 'Custom Fields' section contains the following data:

Model	iphone 6+
Imei	12155644651561
Network	o2
Unlock Code	123456
Item Number	555
Password / Pin	1234
Fault	broken screen

Navigation buttons at the bottom include Print Order, Delete, Save, and Cancel.

Back Office Setting:

A new back office setting added for this feature 'Use Custom fields for Customers' that needs to be set to YES.

The screenshot shows the 'Settings' application window. On the left is a sidebar with buttons for 'All', 'System', 'Sales Viewer', 'Sales', 'Receipt Printer', 'Remote Printer', and 'Accounts'. Below these are 'Locate...' and 'Search' buttons. The main area is titled 'Local (modified settings shown in blue)' and contains a table with two columns: 'Option' and 'Setting'.

Option	Setting
Section : System Settings	
Use Customer Display Script File	NONE
Section : Sales Settings	
Use Custom Fields for Customers	YES

At the bottom of the window are 'Save' and 'Exit' buttons.

Reasons:

A new Reason option for 'Customer: Custom Fields' will get enabled when the back office setting for 'Use customer Fields for customers is set to YES.

Up to 10 reasons can be set on the screen below. Only field names that are set with a title will show on the customer screen custom tab. As per the example below 7 out of the 10 reasons have been populated so only 7 lines show on the custom tab.

The screenshot shows the 'Reasons' application window. At the top is a 'Reason Type' dropdown menu set to 'Customer: Custom Fields'. Below this is a list of 10 'Field Name' entries, each with a text input field. The first seven fields are populated with the following values:

- Field Name 1: Model
- Field Name 2: Imei
- Field Name 3: Network
- Field Name 4: Unlock Code
- Field Name 5: Item Number
- Field Name 6: Password / Pin
- Field Name 7: Fault

Fields 8, 9, and 10 are empty. At the bottom of the window are 'Save' and 'Abort' buttons.

Touch.ini setting:

A new touch.ini setting has been added `OPENCUSTOMERFORMONCUSTOMTAB=YES`
When this setting is added the Customer and Customers Order screens will open on the new custom tab once a customer number has been entered or when a new customer is created.