

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' interface. At the top, there is a header 'Customer Accounts' and an 'Edit by Grid' button. Below the header, there are input fields for 'Code' (value: 1) and 'Name' (value: Cust 50% Disc). A navigation bar contains tabs: 'Details', 'Profile', 'Further Details', 'Pictures', 'Transaction History', 'Cards', 'Comments', and 'Custom'. The 'Custom' tab is active, displaying a 'Custom Fields' section with the following data:

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

At the bottom of the screen, there are navigation buttons: 'First', 'Prev', 'Next', 'Last', 'Delete', 'Save', and 'Cancel'.

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

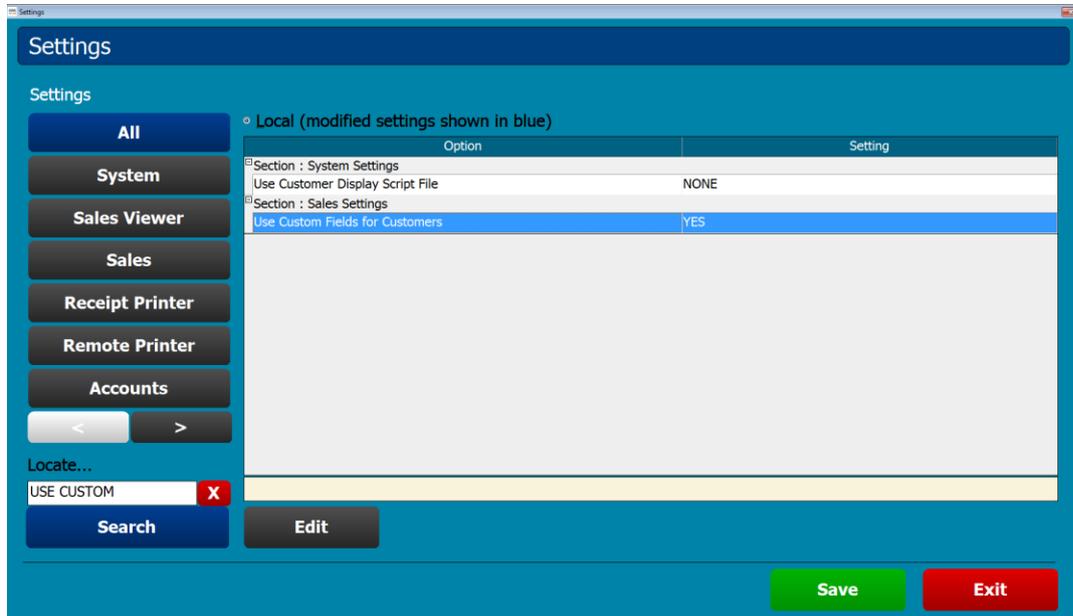
The screenshot shows the 'Customer Orders' interface. At the top, there is a header 'Customer Orders'. Below the header, there are input fields for 'Order Reference' (value: 001-000012) with a 'Search' button, and 'Customer Code' (value: 1). Below that is the 'Name' field (value: Cust 50% Disc). A navigation bar contains tabs: 'Customer Details', 'Delivery Address', 'Product Details', 'Details', and 'Custom'. The 'Custom' tab is active, displaying a 'Custom Fields' section with the following data:

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

At the bottom of the screen, there are navigation buttons: 'Print Order', 'Delete', 'Save', and 'Cancel'.

Back Office Setting:

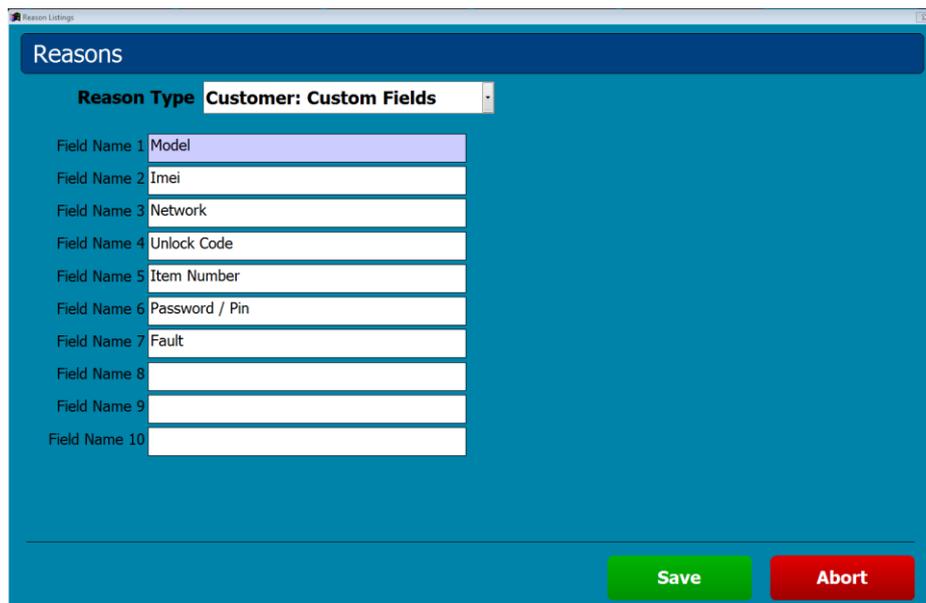
A new back office setting added for this feature 'Use Custom fields for Customers' that needs to be set to YES.



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.



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.