Adding a New Customer before taking an Order

Having described a straightforward order to an existing customer, we will now look at some of the other things that will happen and how inTouch will deal with them. First of all, what if the order is from a new customer?

As before, when the program is on the Main Menu and the telephone rings, the Caller ID unit will intercept the telephone number of the incoming call. inTouch will check the database of existing customers and if it finds that the number has not been used before, the program will move automatically to the Customer Details screen shown below.

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You will see that a “keyboard” is displayed on the screen. Touch the buttons to “type” in the normal way. If you make a mistake, touch the Del button to delete the character(s) to the left and then re-type. If you notice a mistake in another field, simply touch that field and once again touch the Del button to delete the text to the left and then re-type.

Tip! To gain full value from inTouch, you should use it not just for taking orders but for customer mailing and marketing as well. For marketing purposes it is worth taking a little trouble to make sure that the details are accurate. There is also a field for e-mail address if you have time to take it.

This screen is designed to allow you to add a new customer with the minimum amount of typing. The customer’s telephone number is already filled in so you will often only need to type a first name, or initial, a surname, a postcode and a house number, and that’s it!

Touch a Title button, i.e. Mr, Mrs, Miss or Ms, and the program will add your selection to the Title field and move the cursor down to the Forename field. Use the keyboard on the screen to add a customer’s forename or perhaps just their initial.

When you have added the customer’s forename, or initial, touch the Surname field and then type in the customer’s surname. You do not need to worry about upper and lower case (capital and small letters) in the name fields; the program will take care of this for you.

When you have completed the customer’s name, touch the Postcode field, type in their full postcode (no need for a space in the middle) and then touch the Search Postcode button. inTouch will automatically fill in the street name and the rest of the postal address in the Address field.

You will notice that the program leaves a space and positions the cursor at the beginning of the street name. This allows you to add the house number (or name) by touching the buttons on screen as before.

If you enter a postcode that does not exist, the program will display the message “No Match Found”. Touch the OK button and the program will return to the Postcode field, allowing you to re-enter the postcode in case you have made a mistake. If the customer is mistaken about their own postcode, the next section tells you how to search for their street name.

The Zone field allows you to enter up to 8 characters that are associated with the location of the customer, e.g. “C5” could relate to a square on a wall map or “108 G7” could be a page number and grid reference in a street finder. The zone entered here will be printed on the customer receipt.

If you have used the Map Co-ordinates section in Management > Occasional Menu > Options > Set-Up >, then the Zone field will fill automatically with the co-ordinates from your wall map.

The Address Notes field gives you the chance to enter brief notes or directions that will be printed on the customer receipt each time that this customer orders and may be useful to the delivery driver, e.g. “Upstairs Flat”, “Next to the Red Lion” or “Beware of the Dog!”.

You would perhaps not usually enter comments about a customer when they are ringing for the first time. Comments are intended for warnings or reminders to staff and will often result from an incident such as a hoax call. If you touch the Customer Comments button, the screen changes to that shown on the next page.

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This screen allows you to enter comments about a customer for in store use. Any text entered here will automatically appear on screen, before the Order screen is displayed, whenever this customer telephones you in the future. The comment entered here is not printed on the customer receipt.

Use the on-screen keyboard to add text to the Customer Comments field and touch the Accept button when you have finished. The program will then return to the Customer Details screen.

When you have completed the customer name and address, touch the Accept button and the program will take you to the Order screen where you will see that this customer’s details now appear.

If you touch the Cancel button at any stage during the process of adding a new customer to the system, the message “Delete this customer” will appear on screen. If you touch the Yes button, the program will abandon the process, return to the Main Menu and the details that you have typed so far will not be saved. If you touch No, the message will disappear and the program will return to the Customer Details screen.

Note: You can amend the details that are stored for any customer, at any time, by simply touching their name and address on the Order screen. The program moves to Customer Details, as described above, where any piece of information can be edited by simply touching the field, using the Del button to remove text, re-typing and then touching Accept.

Revision #3
Created Fri, Mar 24, 2023 3:17 PM by Simon
Updated Sat, Mar 25, 2023 7:50 PM by Simon