Amending Customer Details from the Order screen

You can amend a customer’s details at anytime by touching the area where the customer’s name and address is displayed on the Order (or Payment) screen (as shown below). The program will take you to that customer’s record in Customer Details where any piece of information can be edited on screen by simply touching the field, using the Del button to remove text, re-typing and then touching Accept to return to the Order screen.

Amending Customer Details from the Order screen 1.jpg

However, when you amend a customer’s record in this way, a new button, Create New Address, appears at the bottom of the Customer Details screen. This button allows you to add, or link, more than one address to the same customer or telephone number, for example a customer calling from an office number as they leave for home, or flats with a shared telephone.

When you touch the Create New Address button, the question box shown below will appear.

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If you touch Yes, inTouch will clear (but not delete) this customer’s address, postcode, zone and address notes from the screen but leave their name and telephone number(s) on view. Add the new address for customer, or telephone number, by postcode or by street name in the normal way and then touch Accept. inTouch will then return to the Order screen with the new address on display.

If you touch No, the program returns to the Customer Details screen and does not create a new address for this customer or telephone number.

If you create more than one address for a customer or telephone number in this way, then whenever you receive a call from that number in the future, the program will not go straight to the Order screen. Instead inTouch will list on screen all the addresses which have been linked to this customer or telephone number. You simply touch the address required and the program will then move to the Order screen with that address on display.

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