Customers not Identified by Telephone Number

As you have seen, when inTouch is connected to a telephone line with Caller ID enabled, it provides automatic caller recognition on screen. However, if the caller withholds their number, or calls from a system that is incompatible or uses a call box, there is no number to be recognised.

Under these circumstances the program will move from the Main Menu to the screen shown below, not the Order screen, with the relevant text, “Withheld”, “Unavailable” or “Call Box”, displayed on screen.

You may also have customers who prefer not to give out their telephone number or don’t even have a telephone! It is always possible to find an existing customer, or add a new customer, under these circumstances. Touch the Delivery button on the Main Menu and the program will move directly to the Search screen shown below.

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Image not found or type unknown

If you are speaking to an existing customer whose number has not appeared on screen, ask them for and then type their telephone number into the field on the Search screen shown above and touch Continue . The program will then move to the Order screen, if the number is recognised, or to the Customer Details screen if the number is not recognised. If you make a mistake, touch Delete and the program will clear the numbers that you have entered, one at a time.

There may be circumstances where you are unable to locate an existing customer by their telephone number, for example customers who request that you do not store their telephone number. This Search screen also enables you to find customers by either their name or their address.

If the incoming call is from someone you believe to be an existing customer but who was not identified by a telephone number, touch the Search By Name button. The program moves to a Customer Search screen with an on-screen keyboard which you should use to type the first few letters of the customer’s surname and then touch Enter.

The program will list all the customers who match your search. To select a customer, simply touch their name and address on the list and the program will move on to the Order screen with that customer’s details.
If the program finds more customers than will fit on one screen, arrows will appear on the right

hand side of the list which allow you to scroll down, and back up, the list until the correct customer is on view. (If this keeps happening, try typing a couple more letters when you search).

Alternatively, touch the Search By Address button and, on the Customer Search screen, use the on-screen keyboard to type the first few letters of the customer's street name (or any part of the address) and touch Enter.

The program will list all the addresses that match your search. As before, select a customer from the list, or use the arrows to the right hand side of the screen to scroll down, and back up, the list until the correct customer is on view. When a customer has been selected, the program will move to the Order screen with that customer's details.

When a list of customers is on screen, you can touch Cancel at anytime to return to the Search screen.

If you search for a customer by telephone number, name and/or address and inTouch does not find them, then they are not an existing customer! To add a new customer at this point, simply touch the Continue button on the Search screen and the program will move to Customer Details. Add the new customer in the normal way.

Note: Remember that you are only using this Search screen because this customer's telephone number did not appear on screen automatically. One of the reasons for the Search screen is that some customers may not want you to store their telephone numbers. Therefore when you add a customer starting from this screen, the Phone No. field is blank and the program allows you to add a new customer without any telephone number. The Search screen will always allow you to find this or any customer by name or by address.

Touch the Main Menu button, or Cancel, when the Search field is blank to return to the Main Menu.

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