Edit Database

When you select this option from the Occasional Menu, the screen shown below will appear.

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This section of the program is intended to help you maintain a clean customer database. A clean database with correct postal addresses and without duplicate customers will pay dividends when you print address labels for a mail-out. This screen enables you to list all, or selected, customers and then choose those to be edited or removed.

Note: The Action box and Reset fields shown on the screen above will only appear if the **Display Reset Options on Edit Customer Database** box is checked in Management > Occasional Menu > Options > Security.

Touch **Cancel** on the above screen to return to the Occasional Menu without listing any customers.

To list all the customers in the database, simply touch the **Start** button without making any other entries on the screen.

Instead of listing all customers however, you can narrow the search by asking for customers with no postcode or zone entered in their details or for customers in a specific postcode or zone.

For example, enter a full postcode (including the space), in the **Postcode** field and inTouch will find and list only the customers with that postcode. If you enter part of a postcode, e.g. “M25”, the program will list all the customers whose postcode includes “M25”.

If you check the **Customers with No Postcode** box, the program will list only the customers in the database who do not have a postcode entered.

Enter a zone, e.g. “C5” in the **Zone** field and inTouch will find and list only the customers in that zone (as entered in the Zone field in Customer Details). If you enter part of a zone or grid reference, the program will list all the customers whose zone includes the part that you have entered.

If you check the **Customers with No Zone** box, the program will list only customers in the database who do not have a zone entered.

After choosing to list all customers, or making one of the above choices, touch **Start**. inTouch will display the message “Loading Please Wait” at the bottom of the screen with a progress bar and also show the total number of customers selected in the bottom left corner. When all the selected customers have been loaded, the message at the bottom of the screen will change to “DoubleClick On A Customer To Amend Details”.

Touch **Stop** at anytime whilst the customer list is loading to stop the process. The program will allow you to work with the customers loaded so far.

The customer list has columns showing their Phone Number, Name, Address, the date of their Last Order, the number of Orders they have made and their Zone. When the list is too long to fit on one screen, a scroll bar appears at the right hand side, enabling you to scroll down and back up the list.

At first, the list is displayed in Phone Number order but you can re-arrange the list by touching the heading of any column. The program will sort the list into descending order of the information in the selected column and, if you touch the column heading again, then sort the list into ascending order of the information in that column.

For example, you could touch the Address heading to sort the list of customers into address order. It is then easy to scroll down through the list and pick out duplicate customers and addresses in the database.

When a list of customers is displayed on screen, you can now choose to edit the details of selected customers or delete them from the system.

To edit the details of a customer, touch that customer’s line on the list. The program takes you to a screen showing the full details recorded for that customer. If you touch **Edit Customer**, inTouch will now allow entry to the Name, Address, Postcode, Telephone Numbers and Zone fields.

To amend any of the details shown on this screen, touch the field that contains the information to be altered, delete the old text and then type the new text in it’s place. Touch **Save Changes** to return to the list of customers.

To remove customers from the customer database, check the **Del** box on the left hand side of the line of each customer on the list that you want to delete. Touch **Done** when you have selected all the customers to be removed.

The program will then display the message below.

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If you touch **Yes**, the program will display the message “Customers Deleted” and return to the Occasional Menu. If you touch **No**, inTouch will return to the Occasional Menu without removing any customers.

You can touch **Done** at any time when a list of customers is on display, to clear the screen and return to the Occasional Menu.

You can create a password to prevent the unauthorised deletion of customers in Management > Occasional Menu > Passwords.

If the **Display Reset Options on Edit Customer Database** box is checked in Management > Occasional Menu > Options > Security, then the Action box and Reset fields will appear on the Edit Database screen.

Warning! These are very powerful options and should not be used lightly; that is why you must take deliberate action to make them appear.

Whenever a customer places an order, inTouch updates the total amount that they have spent, the number of times that they have ordered and the date of their last order. These options give you the ability to reset any part or all of that information.

If you choose to list all customers, or selected customers, as described above and then check one, or more than one, of the Reset boxes before touching **Start**, the program will perform that action. You can therefore reset the **Amount Spent** by a customer and the **Number of Orders** that they have placed, both to zero, and remove their **Last Ordered Date**.

Warning! Do not use any of these options unless you are completely certain that you want to reset the figures. Once you have reset figures, there is no way to restore the original information.

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