Customer Records

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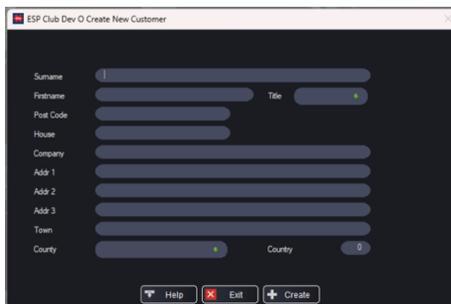
1. Creating A Customer Record

From the **Customers** desktop option, select **Customers:**


The database filter screen will be displayed:

Select and the following screen will be displayed:

Enter the Surname, Firstname and Title followed by the Post Code, press Return or Tab to submit.
The Elite system will now search for records with the same post code or records that have the same surname and initial of the firstname. Any matching records will be returned in the **Select Address** screen:
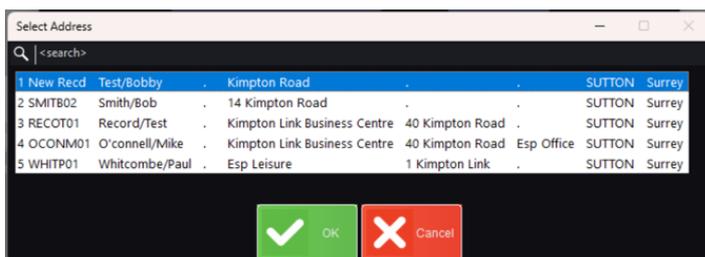
You can now proceed to one of the following steps depending on the action required:

- Select an Existing Record – proceed to 1.1

- Create a Record with AFD Address Finder – proceed to 1.2

- Create a Record and Copy the Address of an Existing Record – proceed to 1.3

- Create a Record as a Relation of an Existing Record – proceed to 1.4
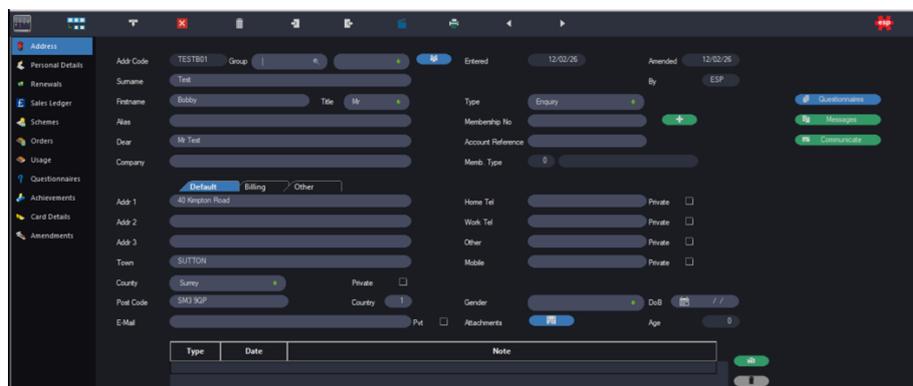
1.1 Select an Existing Record

If the customer already exists, it is best practice to use the existing record and not create a duplicate.

Select the existing record in the Select Address list.
From the **Create New Customer** menu, press **Select This Record**
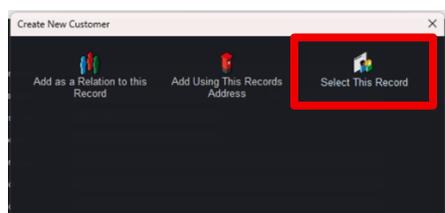
You will then be taken to the existing record.

1.2 Create a Record with AFD Address Finder Enabled

If your system has the licensed AFD Address Finder software enabled, then the first option returned in the above **Select Address** list with be **New Recd**.
Select **New Recd** and you are returned to the previous screen where the official postal address for the postcode is automatically entered; you can now add the House Name or Number before selecting ⊞ Create to create the record.
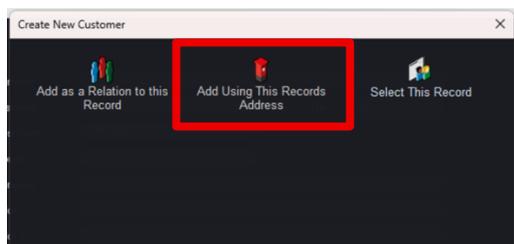
A new Customer Record will now be created and an Address Code assigned which is the unique identifier for the record. You can now add further details for this customer such as telephone numbers, gender, date of birth and e-mail address.

1.3   Create a Record and Copy the Address of an Existing Customer.

If the detail entered matches any other records in your customer database, these will be returned and displayed in the **Select Address** Screen. Select the customer whose address you wish to copy.

From the **Create New Customer** screen then select **Add Using This Records Address:**
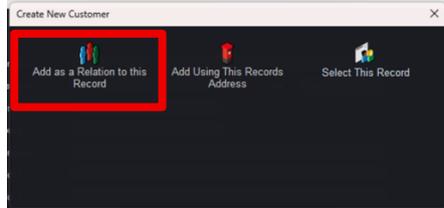

A new Customer Record will now be created and an Address Code assigned which is the unique identifier for the record. The address will be populated, and you can now add further details such as telephone numbers, gender, date of birth and e-mail address.

### 1.4   Create a Record as a Relation of an Existing Customer.

If the detail entered matches any other records in your customer database, these will be returned and displayed in the **Select Address** Screen. Select the customer whose address you wish to copy.

From the **Create New Customer** screen then select **Add as a Relation to this Record**:

A new Customer Record will now be created and an Address Code assigned which is the unique identifier for the record. The address will be populated and a relationship link will be noted by the Address Code of the record that was selected being recorded in the Group field.
To the right of the Group field the relationship that the current record has to the Group should be added.
You can now add further details such as telephone numbers, gender, date of birth and e-mail address.
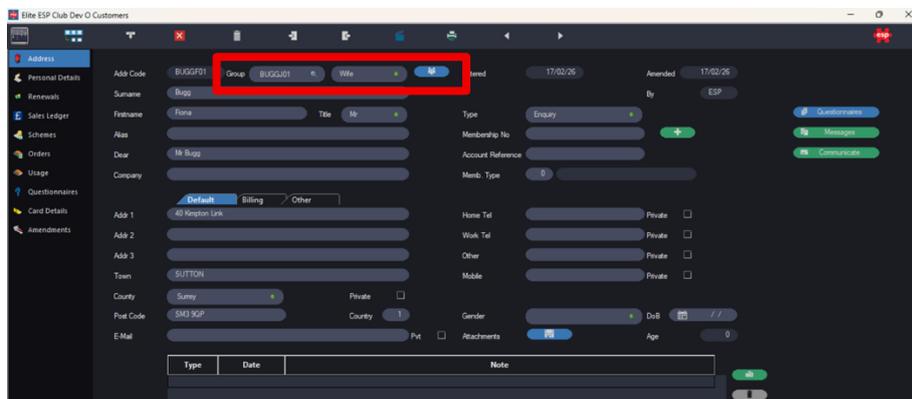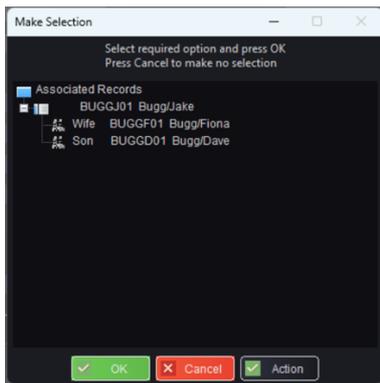

2. View Associated Records

When customer records are linked with a relationship or association to other records you can view any other linked record.

Within the Customer Record, to the right of the Group and Relationship fields, select the Associates button:
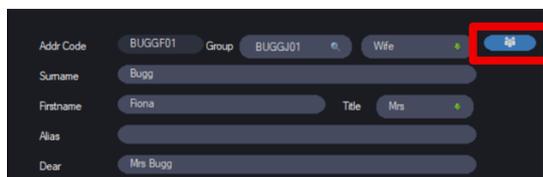

The screen below will be displayed:

Double click an Associated Record in the list to view their Customer Record.

3. Customer Messages

You can add a message to an Individual Member's/Customer's Record which can be displayed whenever the customer is identified at Point of Sale using the Identify Customer Button or the Leisure Arrivals Routine.
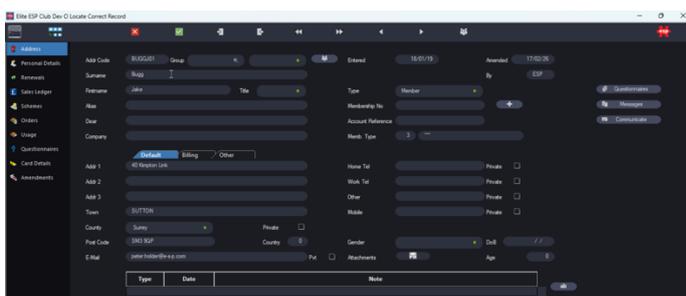
From the Customers desktop option, select Customers:
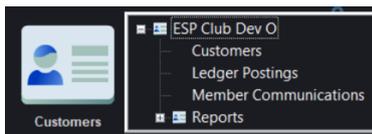
Select the Customer Record which the messages are being added to. To filter the results you can select any criteria via the tabs at the top of this window and then type in data to search. Double click a record in the list to view it.
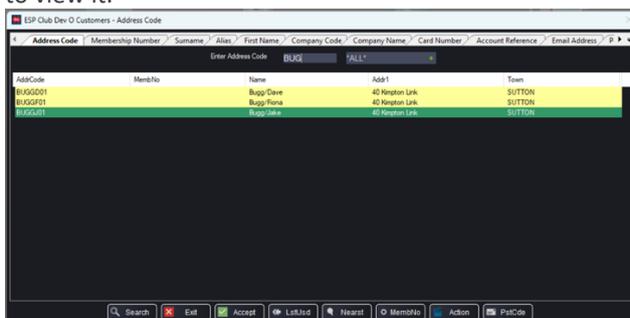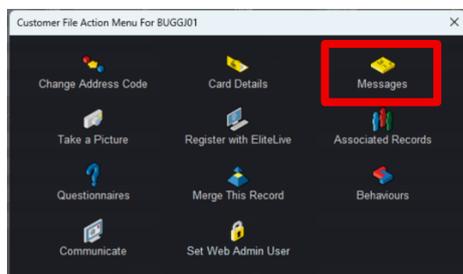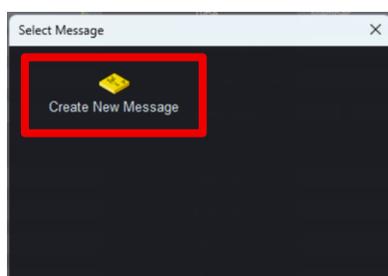

The following screen will be displayed:

To edit the record either click in a field or press the Accept ☑ menu button.

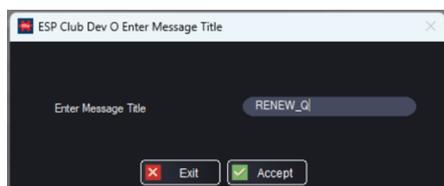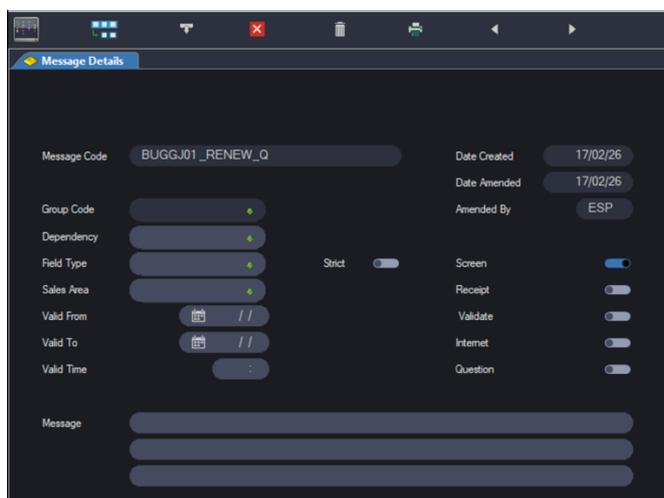Press the Action 📁 Menu button

Select Messages:

Select Create New Message:

Enter a name for the new message and select Accept:

A new message screen will be displayed, as shown below:

The dependency and the field type must be left blank for this to function correctly.

The question box can be selected as Y or N to define whether you want a Yes/No option or just an OK button on the message.

The Sales Area should be left blank unless you wish to restrict which POS the message should be displayed in.

Then select whether you wish the message to be shown on the Screen, Receipt and/or Validation Ticket.

The Valid From/To field allows you to specify a validity period for the message.

Complete the details of the message in the bottom three lines of the message. Once your message is complete, you will have a screen which resembles the example below.
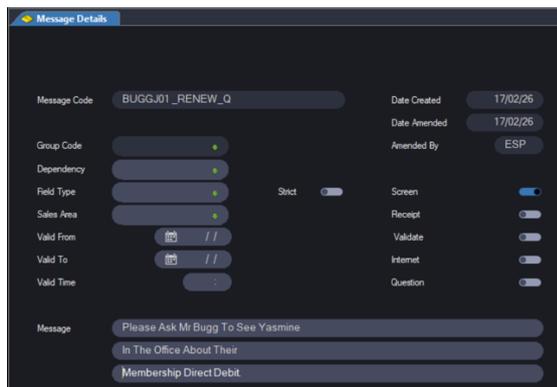
Select F2 Exit. The screen below will be displayed.
You can reaccess this menu and select the message to edit it.
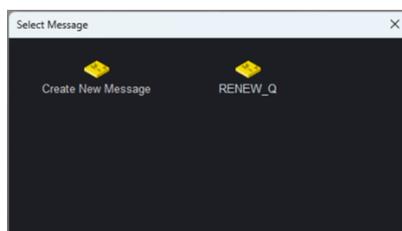
When the customer is identified at Point of Sale, the message will automatically be displayed, as shown below.