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# OCTOPUS<sup>TM</sup>

Point of Sales is the Retail Business Automation System  
for the trend setting retailer.



## Entering Customer Details

The Octopus™ System allows users to enter in the details of the customers and keep track of the purchases of the customers.

It also allows multiple customer types to be setup and adhere a specific discount policy for each customer type if so desired.

But for now, we will cover the two methods to enter customer information.

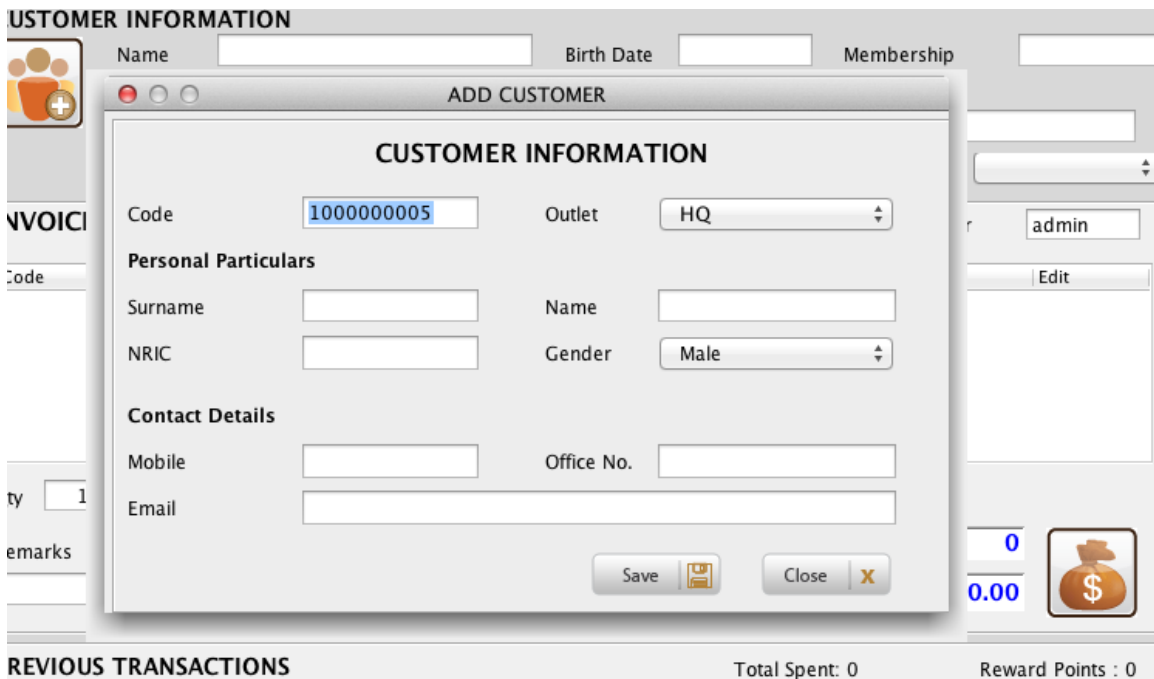
### Method 1: Entering Customer Details manually

There are 2 options for entering customer data manually.

Option 1-> At the sales memo screen, click on the add customer icon :



Upon clicking it, the following screen pops up -> Enter the customer details accordingly. For speedy entry, only 2 fields are required: Name and ID or NRIC. The customer code is computer generated but it can be overwritten by the user if the user so desires.



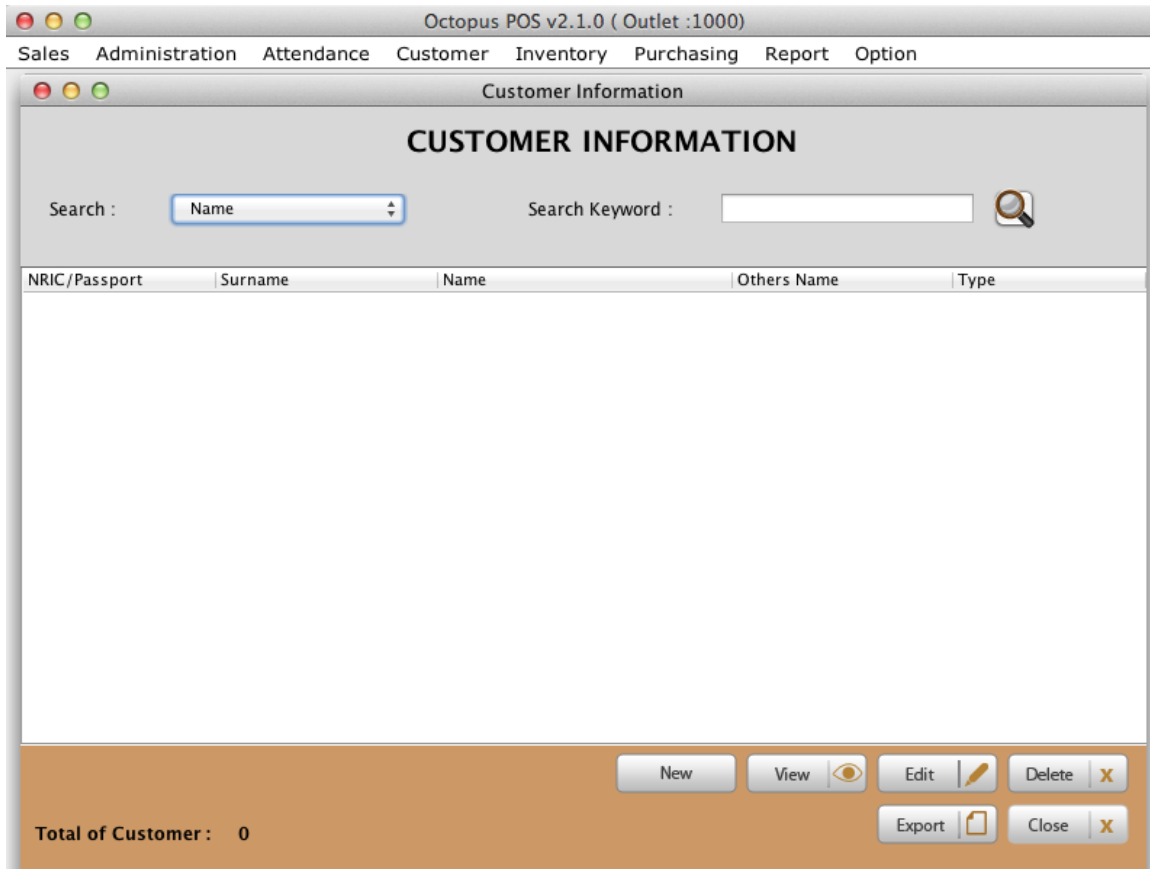
The screenshot shows a software interface with a dialog box titled "ADD CUSTOMER" in the foreground. The dialog box has a title bar with "ADD CUSTOMER" and standard window controls. The main content area is titled "CUSTOMER INFORMATION" and contains several input fields and dropdown menus:

- Code:** A text field containing "1000000005".
- Outlet:** A dropdown menu with "HQ" selected.
- Personal Particulars:**
  - Surname:** An empty text field.
  - Name:** An empty text field.
  - NRIC:** An empty text field.
  - Gender:** A dropdown menu with "Male" selected.
- Contact Details:**
  - Mobile:** An empty text field.
  - Office No.:** An empty text field.
  - Email:** An empty text field.

At the bottom of the dialog box, there are two buttons: "Save" with a floppy disk icon and "Close" with an "X" icon. The background interface shows a "CUSTOMER INFORMATION" header, a sidebar with an "ADD CUSTOMER" icon, and a "REVIOUS TRANSACTIONS" section at the bottom with "Total Spent: 0" and "Reward Points : 0".

Option 2-> Navigate to Customer -> Customer Information.

The following screen will appear. Clicking on the magnifying glass will display all the customer entries. To add a new customer, click on the new button at the bottom of the screen.




The following screen will allow the user to add the details of the customers.

**Customer Information**

SINGLE    MULTIPLE

### CREATE CUSTOMER INFORMATION

Personal Detail		Membership Detail	
		Gender	Male
		Race	
		Company	
Salutation	Mr	Designation	
*Name		Nationality	
Family Name		Marital Status	Single
Other Name		Occupation	Top Manage...
*NRIC/Passport No		Income Group	Below \$2,000
DOB		Age Group	Below 20
		*Code	
		Type	SILVER
		*Join Outlet	ADDIDAS
		Pin Number	
		*Join Date	03/01/2013
		*Expiry Date	01/01/2030
		*Reward Points	0
		Remarks	
		<a href="#">More</a>	
Contact Detail			
Home No.		Address 1	
Handphone No.		Address 2	
Office No.		Address 3	
Email Address		Postal Code	
		Country	

Save    Close

The user may enter details accordingly. Please note that there are several compulsory fields such as

- a) Code - > representing customer code
- b) Join Date and Expiry Date -> defaulted
- c) Rewards Points -> defaulted to 0.

There is also a more button that allows more information to be captured by the user. The specific fields are configurable by the user themselves.

To configure the fields, goto Administration -> System Preference -> Select the Customer Tab and the user can explore how to capture the details accordingly.

The screenshot shows a window titled "SYSTEM PREFERENCES" with a tabbed interface. The "Customer" tab is selected. The main heading is "CUSTOMER ADDITIONAL SETTING".

Configuration options include:

- Customer Label: A dropdown menu set to "Customer".
- No. of Additional Field: A spinner box set to "10". Below it, a note states: "\*Additional fields will be displayed into multiple section with 10 fields for each section."
- No. of Section: A text input field containing "1".
- Set Section Name: A text input field, an "Add" button, and a "Remove" button. A box to the right contains "Section 1".

A table below lists the configured fields:

SNo	Section	Label Field	Label Field Name
1	Section 1	Field 1	Info 1
2	Section 1	Field 2	Info 2
3	Section 1	Field 3	Info 3
4	Section 1	Field 4	Info 4
5	Section 1	Field 5	Info 5
6	Section 1	Field 6	Info 6
7	Section 1	Field 7	Info 7
8	Section 1	Field 8	Info 8

At the bottom right, there are "Save" and "Close" buttons.

Method 2: Entering Customer Details by Uploading a file.  
Navigate to Customer -> Customer information.

Click on the New button and select the Multiple tab. Here the user can upload a file according to the specifications listed.

The screenshot shows a window titled "Customer Information" with two tabs: "SINGLE" and "MULTIPLE". The "MULTIPLE" tab is selected. The main heading is "CREATE MULTIPLE CUSTOMER INFORMATION". Below this, there is a "File:" label, a text input field, an "Open" button, and a "Submit File" button. To the right of the "Submit File" button is a checkbox labeled "First line contains column name". Below the input fields is the instruction: "\*Upload File Format : \*Customer Code, \*Name, Family Name, \*NRIC, DOB (dd/MM/yyyy), Pin No, Phone, Address, Postal Code and Country". A table with the following headers is displayed: Code, Name, Family Name, NRIC, DOB, Pin No, Phone, Address, Postalcode, and Country. The table body is empty. At the bottom of the window, there is a status bar with the text "Total Customer : 0", a "Save" button with a floppy disk icon, and a "Close" button with an "X" icon. Below the status bar, there are two lines of asterisked notes: "\* Denotes Compulsory Field" and "\* Single or double quote character is not allowed for all fields."

**Setting up Customer Types**

**Setting Up Promotions**

**Tracking purchases of Customers**