OCTOPUS™

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

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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.

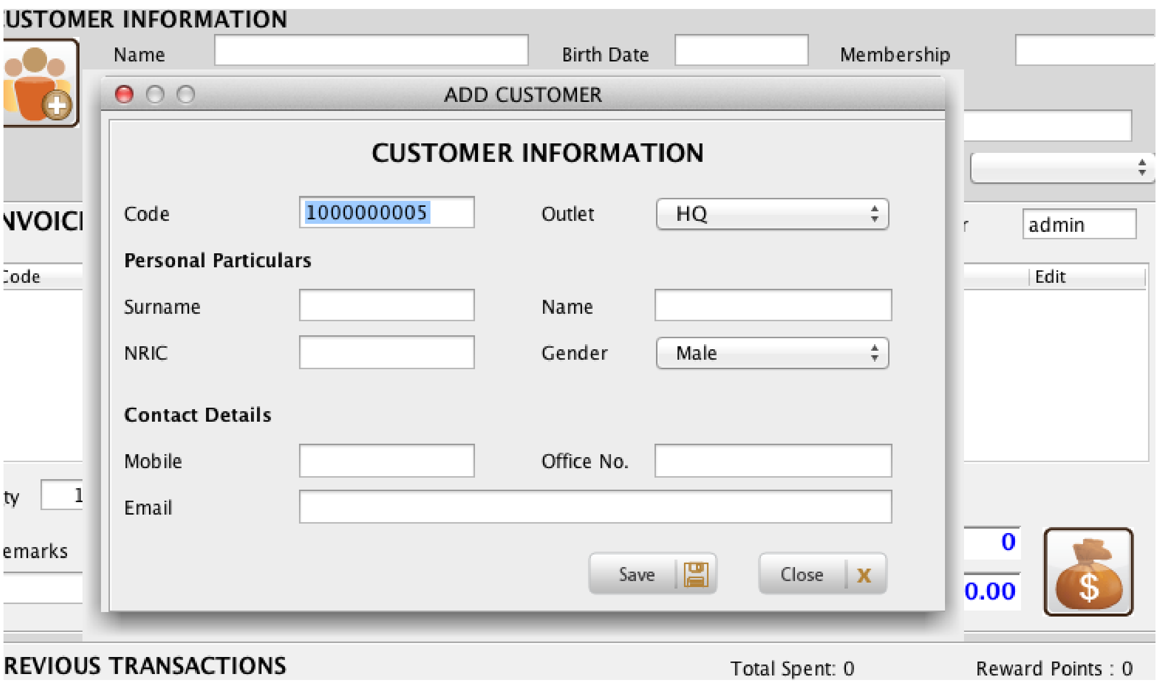
It also allows multiple customer types to be setup and adhere a specific discount policy for each customer type if so desired.

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

Method 1: Entering Customer Details manually

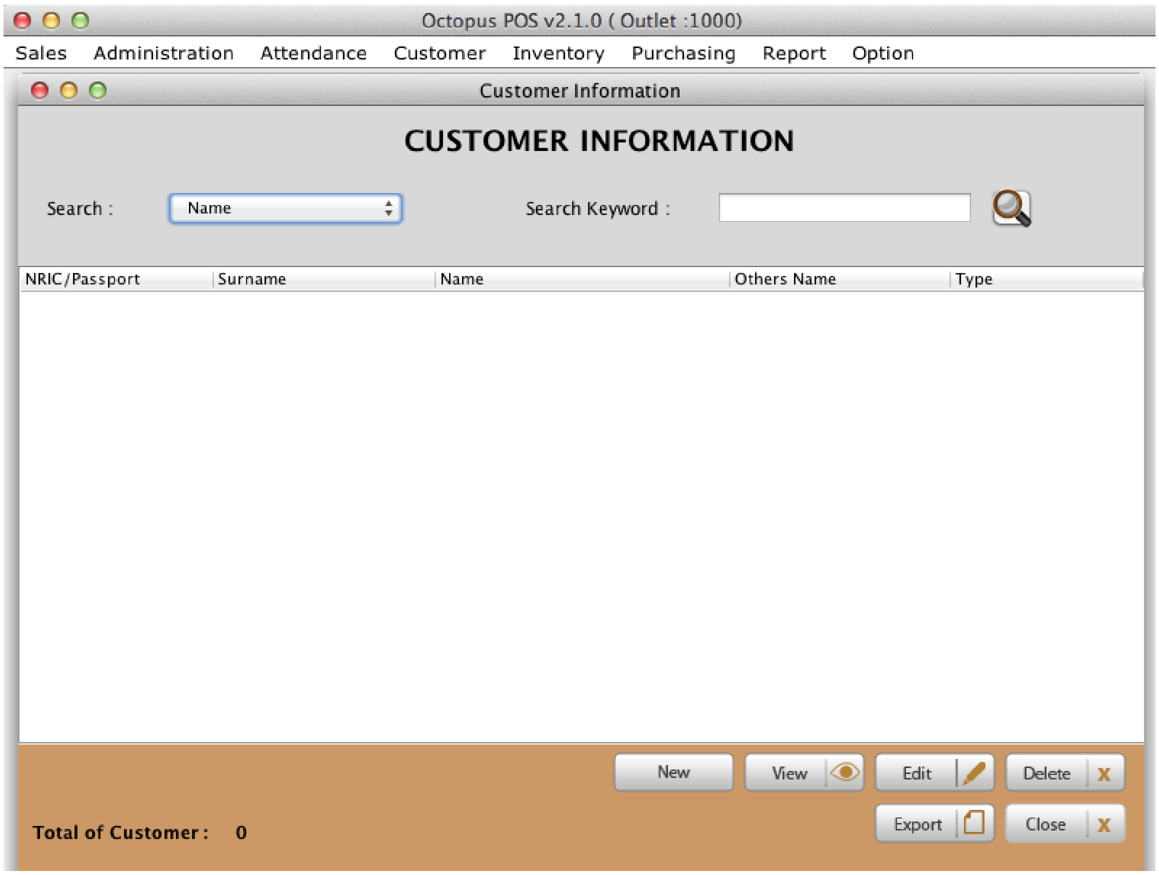
There are 2 options for entering customer data manually.
Option 1-> At the sales memo screen, click on the add customer icon :

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.

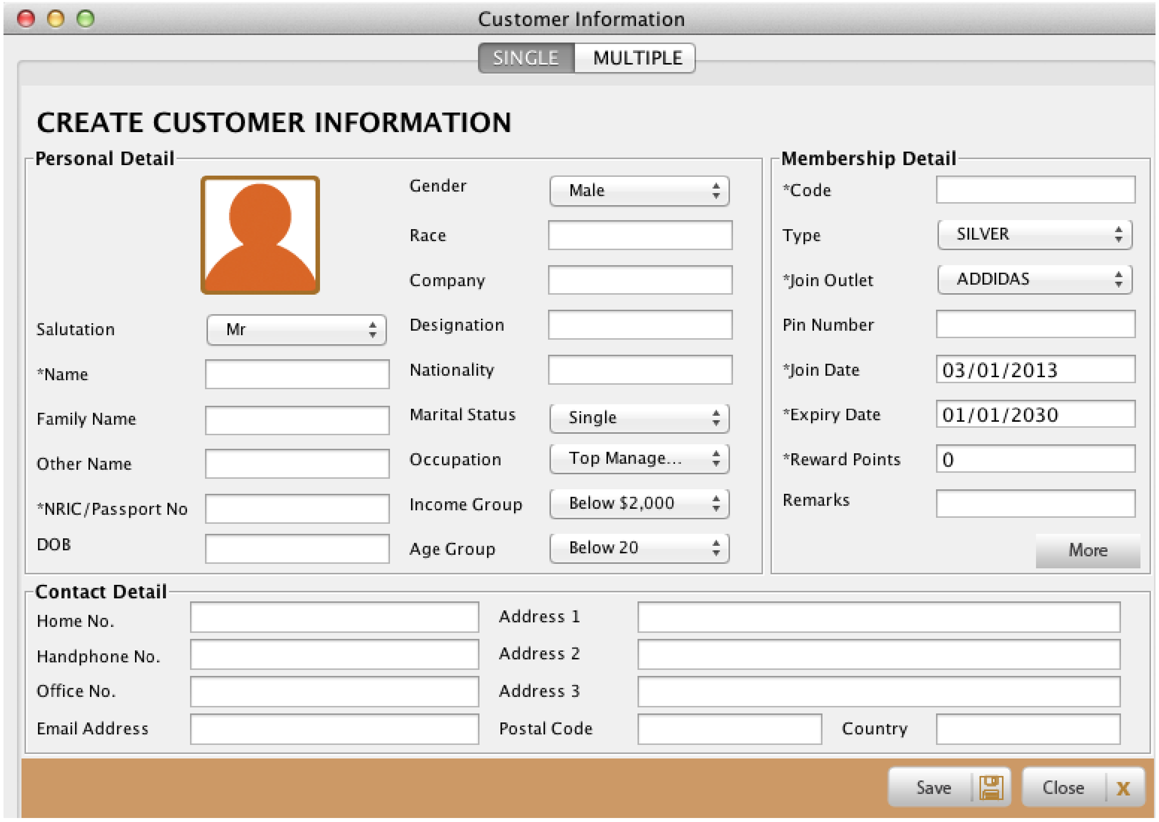


Option 2-> Navigate to Customer -> Customer Information.

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.

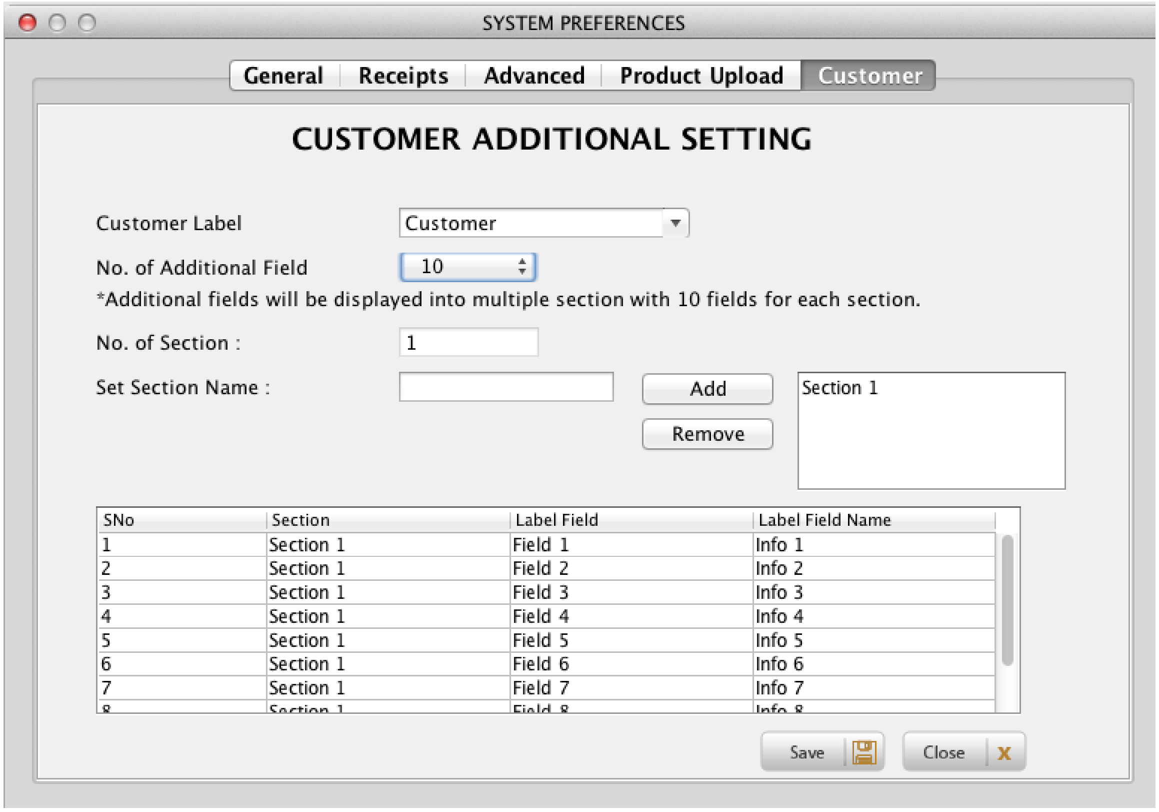


The user may enter details accordingly. Please note that there are several compulsory fields such as

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

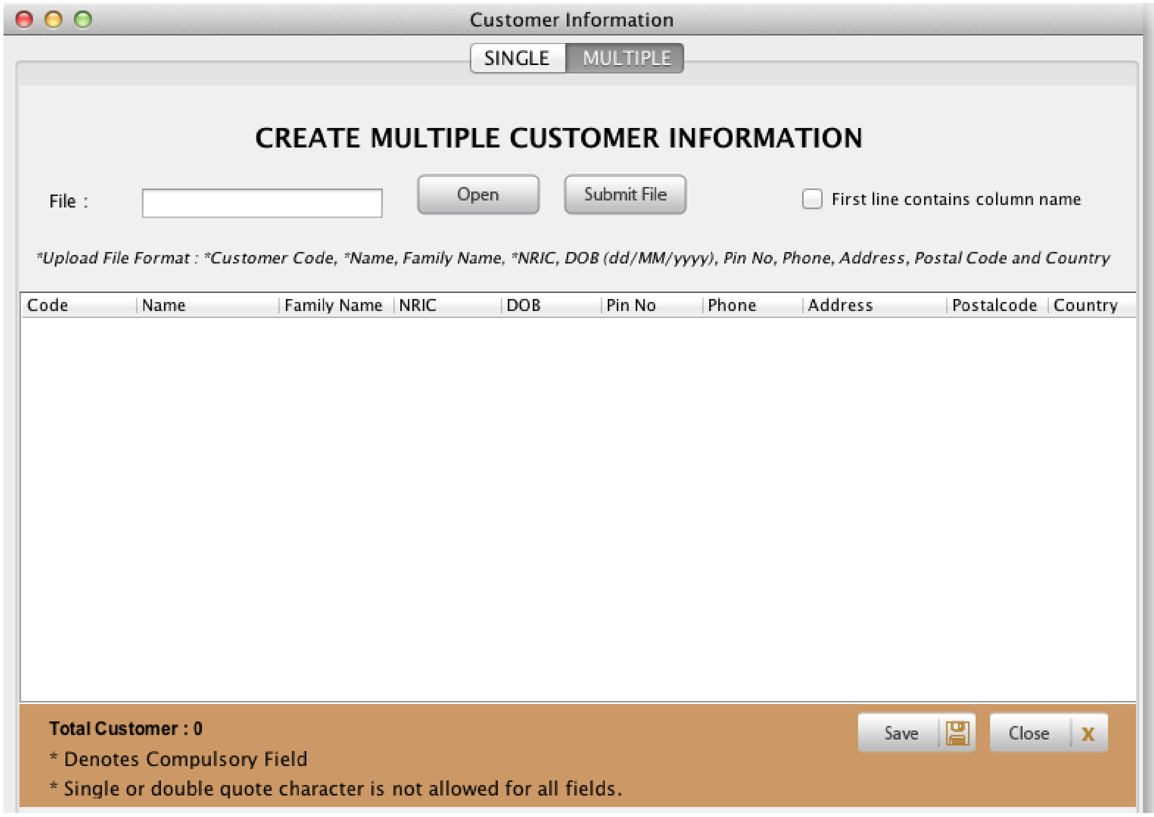
There is also a more button that allows more information to be captured by the user. The specific fields are configurable by the user themselves.

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



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.



Setting up Customer Types

Setting Up Promotions
Tracking purchases of Customers