

## **Controller Series Ver. 7.3 Bulletin 0023**

### **Customer Searches and Lookup Names**

Each user of the software has their own methods for entering a customer's name, be it a business or an individual. Searching for customers is also a unique to each business. In order to allow the maximum flexibility to users, we have implemented the following features.

#### The Customer Lookup Name

First, there is the customer lookup name found on Page 3 of the CUSMAS screen. This lookup name is automatically generated from the customer name and/or address as entered on Page 1 of the CUSMAS screen, or from the customer creation windows found in POS. By default, the lookup name generated will be Last Name <SPACE> First Name, so that a name of William Gerry Frankenstein will become FRANKENSTEIN WILLIAM GERRY.

However, this can be changed as the user likes by setting F376 and creating rules by which the lookup name is built. For this, the user can use any combination of the following:

- FN - First name as determined from NAME1 after a "," or all before last word
- LN - Last name as determined from NAME1 before a "," or last word on line
- N1 - The complete contents of NAME1 line
- N2 - The complete contents of NAME2 line
- AD - Contents of ADDRESS (line 1)
- CT - The complete contents of CITY
- PV - The complete contents of PROVINCE/STATE
- PC - The complete contents of POSTAL/ZIP CODE
- SP - Insert a space
- CO - Insert a comma

In addition, a number can be entered after one of the above to indicate the length of the field to use. Thus, LN10, for example, would be the first 10 characters of the last name. In the flag, the construction terms are separated by commas. The default rule described above is equivalent to LN,SP,FN.

Finally, users may use both name lines available to enter extra information - for example, a company name in name line 1 and an individual contact name in name line 2. In such cases, it would be useful to be able to generate different lookup names depending on whether the customer is a business or an individual. This can be done by creating two rules to be saved in F376, in the form of <rule1>-<rule2>. If there is an entry in the name 2 field, then rule 1 applies, otherwise rule 2 applies.

Some examples of the interpretation of lookup name creation rules. The sample customer is Mr. Frankenstein.

Name 1: William Gerry Frankenstein  
Name 2:  
Address1: 54 Ghoul Place  
City: Hauntsville  
State: TN  
Zip Code: 32415

Rule: LN,CO,SP,FN -> FRANKENSTEIN, WILLIAM GERRY  
Rule: LN10,SP,CT -> FRANKENSTE HAUNTSVILLE  
Rule: LN3,PV,PC3 -> FRATN324

Now, Mr. Frankenstein is also the contact person for Monsters Anonymous, Inc., who have a separate customer account.

Name 1: Monsters Anonymous, Inc.  
Name 2: William Gerry Frankenstein  
Address 1: #34 - 2456 Howlin' Time Boulevard  
City: Hauntsville  
State: TN  
Zip Code: 32415-1500

F376 is set to N14,PC3,SP,N299-LN3,FN1,PC3,SP,N199 (this is a real example, taken from one of our customer sites). For Monsters Anonymous, Inc, the lookup name is derived from rule 1, as the Name 2 field is filled. It is

MONS324 WILLIAM GERRY FRANKENSTEIN

while Mr. Frankenstein's lookup name, generated by rule 2 (Name 2 field is empty) is

FRAW324 WILLIAM GERRY FRANKENSTEIN

**NOTE:** The default (when F376 is blank) is equivalent to N1-LN,SP,FN .

## The Customer Number Field

In POS and CUSMAS, the user can find a customer in a number of ways. If the customer number is known, it can be entered directly. The F9 Lookup can be used as always, with any characters entered in the customer number field being used as the starting characters in the lookup name.

A new feature is the ability to enter the customer's 7 digit phone number. The entire customer database is searched for matches of this phone number (regardless of any area codes). If a single match is found, that customer is loaded. If there are multiple matches, a pop-up window appears showing the matches and allowing the user to select the correct customer.

[ Customer Lookup by Phone Number ]			
Cust. #	Customer Name	Phone Number	Loyalty #
GILARN	Arnold Gill	250-954-0334	
SWEPAT	Patrick Sweet	604-758-1122	

Note in the above example, the phone number match occurred in the alternate phone numbers, not in the primary phone numbers.

Finally, if the business has a loyalty program in effect (F078 = Y, YN, or YY), then the 10 digit loyalty number can be used to uniquely identify a customer.

In other parts of the software, the phone number and the loyalty membership number search methods are not active, as in general, the customer will not be there to give you that information.