



# Customer Guide

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Version 4.4

Jack Gerrard  
August 2017

This Guide deals with the setup of uniCenta oPOS Customers.

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# Foreward

The focus of this document is the Administration of uniCenta oPOS Products.

Related guides:

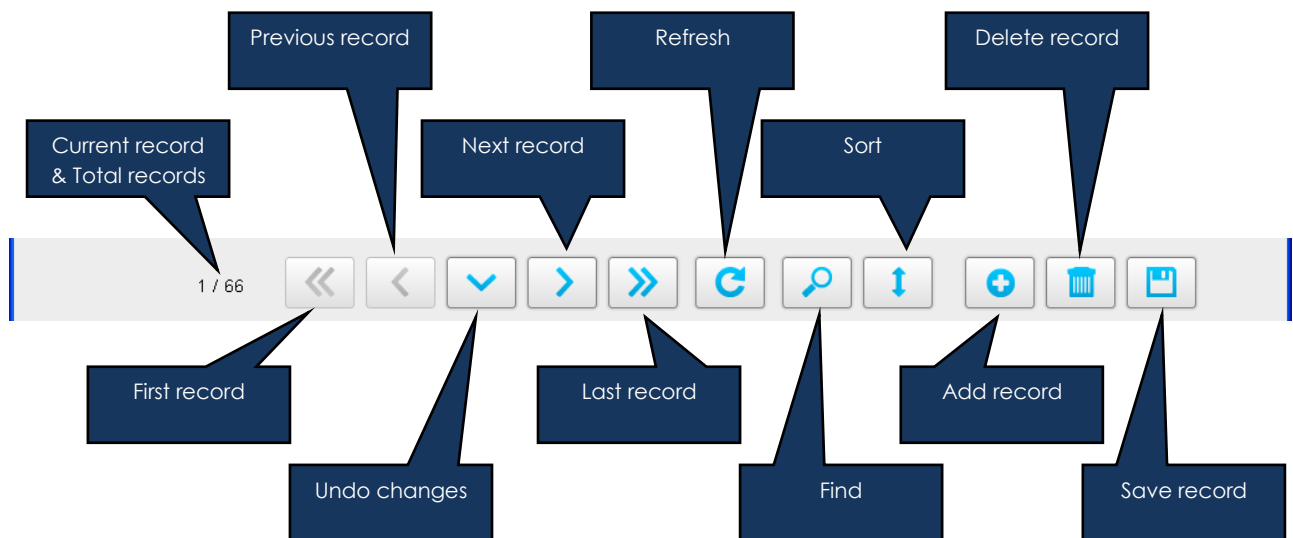
**Taxes :**

<https://unicenta.com/packages/guide-taxes-management/>

# Useful things

## Editor Toolbar

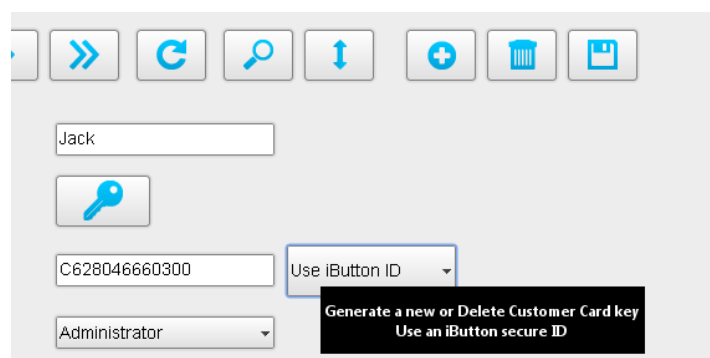
You will see this toolbar is used throughout uniCenta oPOS so here's a quick overview of what the buttons do. The Editor Toolbar appears in all record management forms.



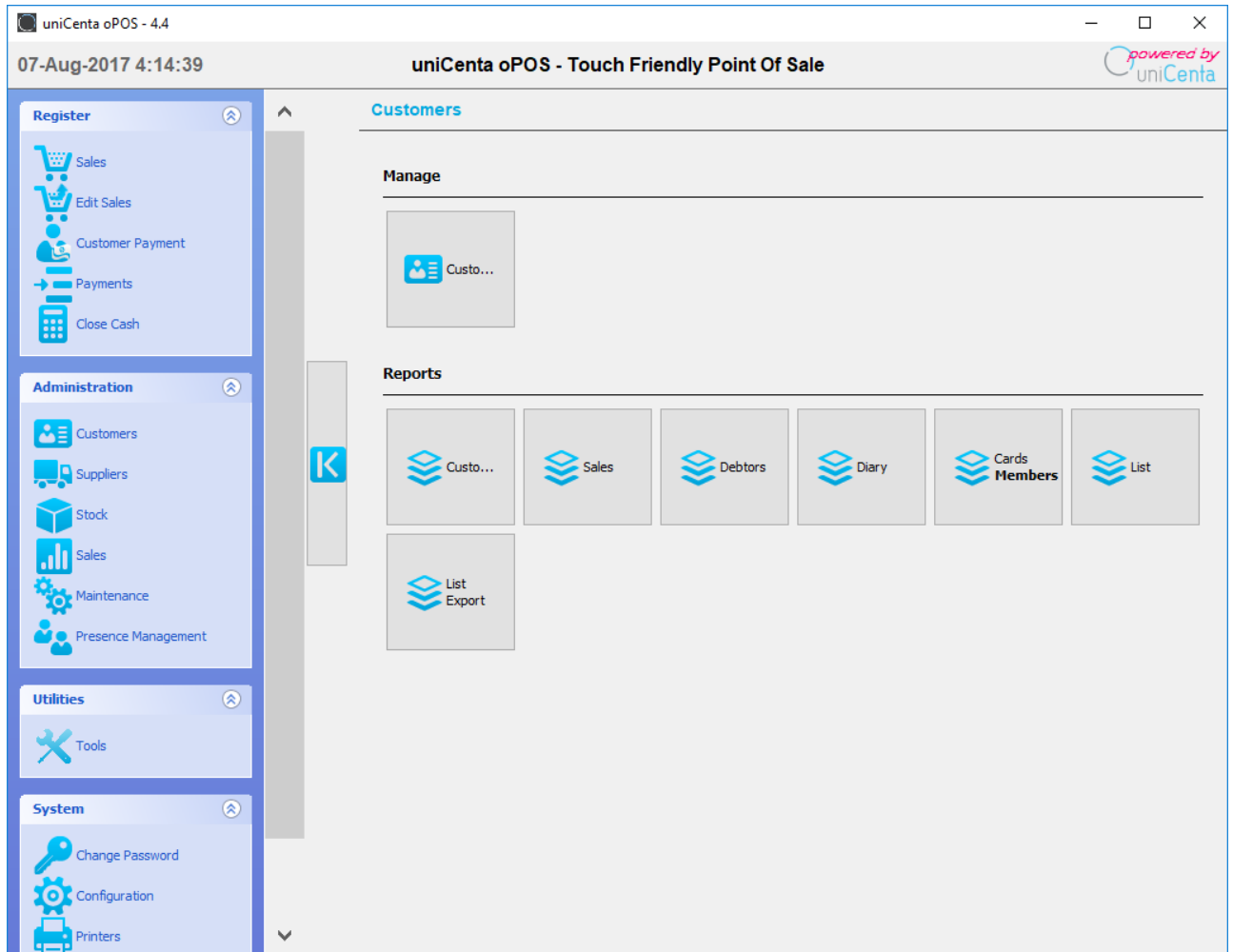
## Tooltips

Lots of things in uniCenta oPOS use pop-up Tooltips.

All you have to do is hover your mouse pointer over a component for a second and it will give you a brief description of what it does. Tooltips are constantly being added or revised as uniCenta oPOS development progresses.



# OVERVIEW



Go to *Administration>Customers>Customers*.

# GENERAL

The screenshot shows the uniCenta oPOS - Touch Friendly Point Of Sale interface. The window title is "uniCenta oPOS - 4.4" and the date/time is "07-Aug-2017 3:36:55". The main title is "uniCenta oPOS - Touch Friendly Point Of Sale". The interface is divided into two main sections: a list of customers on the left and a detailed form for editing a customer record on the right.

**Customers List:**

- Claire Weston
- Karen Willetts
- Julie Nield
- Julie Wardhaugh
- Wadi Plunkett
- uniCenta** (selected)
- Irene Goodson
- Sarah Moorhouse
- Martha Davies
- Julie Hall
- Danielle Cook
- Nikki Kirk
- Angela Stewart-Milne
- Hayley Gaskell
- Jill Tompkinson
- Jackie Ramsden
- Lynsey McIntosh
- Chris Edwards
- Sarah Read
- Lauren McKee
- Joanne Findlow
- Cheryl Hallworth
- Mas Harding
- Karen Kromolicki
- Rebecca Smee
- Susan Ogden
- Nicholas Townsend
- Alexandra Riach
- Lesley Slater
- Patricia Hill
- Sarah Dav

**Customer Record Form:**

**Account ID:** UNI001 **Search Key \*:** unicenta

**Name \*:** uniCenta

**Card ID:** c912780902235

**Visible:** ☒

**Customer Tax Category:**  **VIP:** ☐ **Discount:** 0 %

**Credit Limit:** £1,000,000.00 **Current Debt:** £21.00 **Debt Date:** 07-Aug-2017 **Memo Date:** 29-Aug-2017

**Contact:** Jack **Last Name:** Gerrard **email:** jackg@unicenta.com **Telephone:** +44 (0)203 051 8601 **Mobile Phone:** +44 (0)7743 123456 **Fax:**

Refer to the **Useful things>Editor Toolbar** above to see how you can step through records; Sort, Filter and Search Customer data.

The Customer List is also affected by your Editor Toolbar option choice.

**Note:** You cannot delete a Customer record if it has any type of sales or payment transaction.

Fields shown with a \* are mandatory and must be completed.



**Account ID**

Double-touch to copy this record's hidden ID to the Clipboard

**Search Key \***

Your own format Customer Account identifier

This must be unique. Used in Customer Finder

**Name \***

The Customer Account Name

**Card ID**

Must begin with lowercase "c" and is used to generate a barcode in several reports.

If you use Customer Member cards you can swipe or scan the barcode when in the Sales screen to quickly assign the current ticket to the Customer



Auto-generate a unique Card ID or enter your own



Clear existing Card ID

**Visible**

Default is checked. Unchecked will suppress Customer details from lists

**Customer Tax Category**

See [uniCenta OPOS Taxes Management](#)

**VIP**

If checked; a pop-up message will appear in the Sales Screen when the Customer is assigned to a ticket

**Discount**

Percentage Discount this Customer enjoys

**Credit Limit**

Maximum sales value this Customer can have on-account

**Current Debt**

The current on-account balance

**Debt Date**


Last on-account transaction date

**Memo Date** 

Provided for you to record a convenient i.e.; Next reminder date. Touching the calendar icon opens the Date Picker

# TAB - CONTACT

The screenshot shows the uniCenta oPOS interface. At the top, the title bar reads 'uniCenta oPOS - 4.4' and the window title is 'uniCenta oPOS - Touch Friendly Point Of Sale'. The date and time are '07-Aug-2017 3:36:55'. The 'Customers' tab is active, displaying a list of customers on the left and contact details on the right. The customer list includes names like Claire Weston, Karen Willetts, Julie Nield, Julie Wardhaugh, Wadi Plunkett, uniCenta (highlighted), Irene Goodson, Sarah Moorhouse, Martha Davies, Julie Hall, Danielle Cook, Nikki Kirk, Angela Stewart-Milne, Hayley Gaskell, Jill Tomkinson, Jackie Ramsden, Lynsey McIntosh, Chris Edwards, Sarah Read, Lauren McKee, Joanne Findlow, Cheryl Hallworth, Mas Harding, Karen Kromolicki, Rebecca Smee, Susan Ogden, Nicholas Townsend, Alexandra Riach, Lesley Slater, Patricia Hill, and Sarah Dav. The contact details for Jack Gerrard are shown on the right, including Account ID (UNI001), Name (uniCenta), Card ID (c912780902235), Visible (checked), Customer Tax Category (dropdown), VIP (unchecked), Discount (0%), Credit Limit (£1,000,000.00), Current Debt (£21.00), Debt Date (07-Aug-2017), and Memo Date (29-Aug-2017). The contact details section has tabs for Contact, Address, Transactions, Photo, and Notes. The contact details form includes fields for First Name (Jack), Last Name (Gerrard), email (jackg@unicenta.com), Telephone (+44 (0)203 051 8601), Mobile Phone (+44 (0)7743 123456), and Fax.

<b>First Name</b>	Up to 250 characters. Can be null
<b>Last Name</b>	Up to 250 characters. Can be null
<b>email</b>	Up to 250 characters. Can be null
<b>email button</b> 	Opens your desktop email client
<b>Telephone</b>	Up to 250 characters. Can be null
<b>Mobile Phone</b>	Up to 250 characters. Can be null
<b>Fax</b>	Up to 250 characters. Can be null

# TAB - ADDRESS

The screenshot shows the uniCenta oPOS interface. At the top, the title bar reads "uniCenta oPOS - 4.4" and the window title is "uniCenta oPOS - Touch Friendly Point Of Sale". The date and time "07-Aug-2017 3:38:20" are displayed on the left. The "Customers" tab is selected, showing a list of customers on the left and a form for editing a customer on the right. The customer list includes names like Claire Weston, Karen Willetts, Julie Nield, Julie Wardhaugh, Wadi Plunkett, uniCenta (highlighted), Irene Goodson, Sarah Moorhouse, Martha Davies, Julie Hall, Danielle Cook, Nikki Kirk, Angela Stewart-Milne, Hayley Gaskell, Jill Tompkinson, Jackie Ramsden, Lynsey McIntosh, Chris Edwards, Sarah Read, Lauren McKee, Joanne Findlow, Cheryl Hallworth, Mas Harding, Karen Kromolicki, Rebecca Smee, Susan Ogden, Nicholas Townsend, Alexandra Riach, Lesley Slater, Patricia Hill, and Sarah Dav. The form for the selected customer (uniCenta) includes fields for Account ID (UNI001), Search Key (unicenta), Name (uniCenta), Card ID (c912780902235), Visible (checked), Customer Tax Category (dropdown), VIP (unchecked), Discount (0 %), Credit Limit (£1,000,000.00), Current Debt (£21.00), Debt Date (07-Aug-2017), and Memo Date (29-Aug-2017). Below these fields are tabs for Contact, Address, Transactions, Photo, and Notes. The Address tab is active, showing fields for Address Line 1 (64-66 Millman Street), Address Line 2 (Bloomsbury), Town/City (London), State/County (empty), Country (England), and PostCode (WC1N 3EF).

uniCenta oPOS - 4.4

07-Aug-2017 3:38:20

uniCenta oPOS - Touch Friendly Point Of Sale

Customers

6 / 3,620

Claire Weston  
Karen Willetts  
Julie Nield  
Julie Wardhaugh  
Wadi Plunkett  
uniCenta  
Irene Goodson  
Sarah Moorhouse  
Martha Davies  
Julie Hall  
Danielle Cook  
Nikki Kirk  
Angela Stewart-Milne  
Hayley Gaskell  
Jill Tompkinson  
Jackie Ramsden  
Lynsey McIntosh  
Chris Edwards  
Sarah Read  
Lauren McKee  
Joanne Findlow  
Cheryl Hallworth  
Mas Harding  
Karen Kromolicki  
Rebecca Smee  
Susan Ogden  
Nicholas Townsend  
Alexandra Riach  
Lesley Slater  
Patricia Hill  
Sarah Dav

Account ID: UNI001 Search Key: unicenta

Name: uniCenta

Card ID: c912780902235

Visible: ☒

Customer Tax Category: [dropdown] VIP: ☐ Discount: 0 %

Credit Limit: £1,000,000.00 Current Debt: £21.00 Debt Date: 07-Aug-2017 Memo Date: 29-Aug-2017

Contact Address Transactions Photo Notes

Address Line 1: 64-66 Millman Street

Address Line 2: Bloomsbury

Town/City: London PostCode: WC1N 3EF

State/County: [empty]

Country: England

<b>Address Line 1</b>	Up to 250 characters. Can be null
<b>Address Line 2</b>	Up to 250 characters. Can be null
<b>Town/City</b>	Up to 250 characters. Can be null
<b>State/County</b>	Up to 250 characters. Can be null
<b>PostCode</b>	Up to 250 characters. Can be null
<b>Country</b>	Up to 250 characters. Can be null



# TAB - TRANSACTIONS

uniCenta oPOS - 4.4

07-Aug-2017 3:40:40

uniCenta oPOS - Touch Friendly Point Of Sale

Customers

6 / 3,620

Claire Weston  
 Karen Willetts  
 Julie Nield  
 Julie Wardhaugh  
 Wadi Plunkett  
**uniCenta**  
 Irene Goodson  
 Sarah Moorhouse  
 Martha Davies  
 Julie Hall  
 Danielle Cook  
 Nikki Kirk  
 Angela Stewart-Milne  
 Hayley Gaskell  
 Jill Tompkinson  
 Jackie Ramsden  
 Lynsey McIntosh  
 Chris Edwards  
 Sarah Read  
 Lauren McKee  
 Joanne Findlow  
 Cheryl Hallworth  
 Mas Harding  
 Karen Kromolicki  
 Rebecca Smee  
 Susan Ogden  
 Nicholas Townsend  
 Alexandra Riach  
 Lesley Slater  
 Patricia Hill  
 Sarah Dav

Account ID: UNI001  
 Search Key: unicenta  
 Name: uniCenta  
 Card ID: c912780902235  
 Visible: ☒  
 Customer Tax Category:   
 VIP: ☐ Discount: 0 %  
 Credit Limit: £1,000,000.00  
 Current Debt: £21.00  
 Debt Date: 07-Aug-2017  
 Memo Date: 29-Aug-2017

Contact Address Transactions Photo Notes

Show Transactions

Tkt#	Date	Product	Qty	Total
24341	2017-08-07 03...	BEER1	1	5
24341	2017-08-07 03...	EB740C Silver Elephant Necklace	1	15
24341	2017-08-07 03...	Pound basket	1	1
24213	2017-07-17 10...	11200 Med Owl GB 0855	1	1.5
24213	2017-07-17 10...	BF12NF Bunny on Flowers Nail File	1	2
24213	2017-07-17 10...	BF6BS Bunny Flower Small Bag	1	8
24213	2017-07-17 10...	LPB124 Make a Wish	1	3
24193	2017-07-15 01...	443 Various Printed Scarf	1	10

**Show Transactions** button

A fine-grained detail list of the Customer's last eight Product sales

# TAB - PHOTO

uniCenta oPOS - 4.4

07-Aug-2017 3:42:10

uniCenta oPOS - Touch Friendly Point Of Sale

Customers

6 / 3,620

Claire Weston  
 Karen Willetts  
 Julie Nield  
 Julie Wardhaugh  
 Wadi Plunkett  
**uniCenta**  
 Irene Goodson  
 Sarah Moorhouse  
 Martha Davies  
 Julie Hall  
 Danielle Cook  
 Nikki Kirk  
 Angela Stewart-Milne  
 Hayley Gaskell  
 Jill Tompkinson  
 Jackie Ramsden  
 Lynsey McIntosh  
 Chris Edwards  
 Sarah Read  
 Lauren McKee  
 Joanne Findlow  
 Cheryl Hallworth  
 Mas Harding  
 Karen Kromolicki  
 Rebecca Smee  
 Susan Ogden  
 Nicholas Townsend  
 Alexandra Riach  
 Lesley Slater  
 Patricia Hill  
 Sarah Dav

Account ID: UNI001  
 Search Key: unicenta  
 Name: uniCenta  
 Card ID: c912780902235  
 Visible: ☒  
 Customer Tax Category:   
 VIP: ☐ Discount: 0 %  
 Credit Limit: £1,000,000.00  
 Current Debt: £21.00  
 Debt Date: 07-Aug-2017  
 Memo Date: 29-Aug-2017

Contact Address Transactions **Photo** Notes

NO PHOTO  
 100%

Photo should not exceed 250 x 250 pixels



Open File Explorer



Remove current image



Zoom In

100%

Current zoom %



Zoom Out

# TAB - NOTES

uniCenta oPOS - 4.4

07-Aug-2017 3:44:52

uniCenta oPOS - Touch Friendly Point Of Sale

powered by uniCenta

Customers

6 / 3,620

Sarah Day  
Pauline Fraser  
Hannah Blackshaw  
Lindsay Brough  
Joanne Grainger  
Wendy Wilson  
Judith Fairbrother  
Donna Ledward  
Margaret Ward  
Gill McNeil  
Anne Maher  
Kaye Holland  
Susan Anderson  
V Morton  
Alice Murphy  
Amber Schoolden  
Tina Murray  
Kath Neville  
Pat McDermott  
Sandra Whitfield  
Ciara Shields  
Denise McGovern  
Catherine Whitmore  
Kathleen Kelly  
Jane Evans  
Pauline Clark  
Lisa Wilkinson  
Nicola Kirkham  
Dorothy Longden  
Nicola Nadin  
Carolyn Meehan

Account ID: UNI001 Search Key: unicenta

Name: uniCenta

Card ID: c912780902235

Visible: ☒

Customer Tax Category:  VIP: ☐ Discount: 0 %

Credit Limit: £1,000,000.00 Current Debt: £21.00 Debt Date: 07-Aug-2017 Memo Date: 29-Aug-2017

Contact Address Transactions Photo Notes

8th August - email reminder  
7th August - Call re: Order pickup  
6th August - Order pickup

A convenient place to keep freehand notes

# REPORTS

These following components are used throughout uniCenta oPOS and available depending on the current module in use.

## FILTER

**Customer** Complete a Customer account name and touch Run Report.

Use the wildcard character % before, after or within a Customer's name.

Jack% returns all Customers whose name begins with *Jack*

%Gerrard returns all Customers whose name ends with *Gerrard*

%Ger% returns all Customers whose name contains *Ger*



button Touch to open the Customer Finder



Show/Hide the filter control panel



Run Report

## FINDER

Complete any of the fields to filter Customer data.  
You can enter partial details in any field.

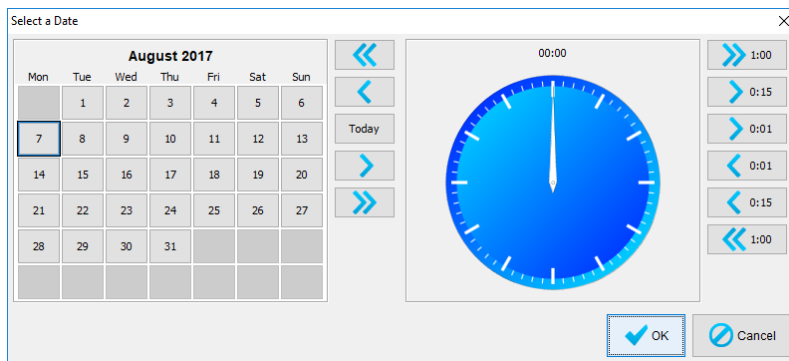


Executes your filter. If all form fields are left empty and you have a lot of records this may take some time.



Clears and Resets the form.

## DATE PICKER



**Today** – set to current date and time



Back a month, minute(s)



Forward a month, minute(s)

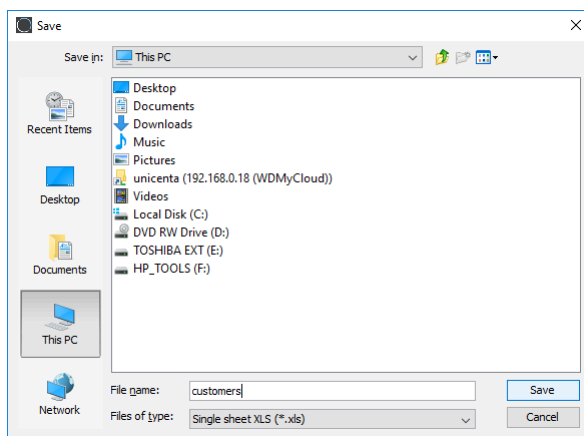


Back a year, hour



Forward a year, hour

## FILE EXPLORER



All reports can be saved to various file formats for use in other external applications.

- JasperReports
- PDF
- RTF
- ODT
- DOCX
- HTML
- Single Sheet XLS
- Multiple Sheet XLS
- CSV
- XML
- Embedded Images XML

# CUSTOMERS

uniCenta oPOS - 4.4  
07-Aug-2017 3:59:59

uniCenta oPOS - Touch Friendly Point Of Sale

Customers

Customer: uniCenta

Printed: 07/08/2017 3:59 AM

**uniCenta**  
UNID001  
64-66 Millman Street  
Bloomsbury  
London WC1N 3EF

**Max Debt** £1,000,000.00  
**Owing** £21.00  
**Date** 07-Aug-2017

**Notes**  
8th August - email reminder  
7th August - Call re: Order pickup  
6th August - Order pickup

Page 1 of 1

Customer account summary statement

# SALES

uniCenta oPOS - 4.4  
07-Aug-2017 3:57:11

uniCenta oPOS - Touch Friendly Point Of Sale

Sales

Printed: 07/08/2017 3:56 AM

Period: 07-Jul-2017 00:00:00 - 07-Aug-2017 03:54:00

uniCenta Product	Date	Ticket	Type	Qty	Amount
11200 Med Owl GB 0855	17-Jul-2017	24213	0	1	£1.25
1723 Dog	09-Jul-2017	24012	0	1	£10.42
443 Various Printed Scarf	09-Jul-2017	24016	0	1	£8.33
443 Various Printed Scarf	14-Jul-2017	24158	0	1	£8.33
443 Various Printed Scarf	15-Jul-2017	24193	0	1	£8.33
BEER1	07-Aug-2017	24341	0	1	£4.17
BF12NF Bunny on Flowers Nail File	17-Jul-2017	24213	0	1	£1.67
BF66S Bunny Flower Small Bag	17-Jul-2017	24213	0	1	£6.67
EB740C Silver Elephant Necklace	07-Aug-2017	24341	0	1	£12.50
FH8712 Abbey Raven LRG Grab	15-Jul-2017	24171	0	1	£58.33
FS0916 Abbey Raven Mix Zip	15-Jul-2017	24171	0	1	£32.50
LGS Summer Rose	14-Jul-2017	24143	0	2	£5.00
LPB124 Make a Wish	17-Jul-2017	24213	0	1	£2.50
Luxury Soap Summer Rose	14-Jul-2017	24143	0	1	£5.00
Pound basket	07-Aug-2017	24341	0	1	£0.83
Teabags Raspberry Cream Tea	09-Jul-2017	24012	0	1	£1.46
E10 Redeem voucher	14-Jul-2017	24158	0	1	£10.00
<b>Total</b>				<b>18</b>	<b>£157.30</b>

Page 1 of 1

Customer Product/Ticket sales

Grouped by Customer with Product sales values with Product name descending

# DEBTORS

Customer Debtors

Printed 07/08/2017 3:58 AM

Account	Name	Address	Date	Owing
UN001	uniCenta	64-66 Millman Street	07/08/17 00:00	£21.00
				<b>£21.00</b>

Page 1 of 1

## Customer Debtors List

Individual Customer account status including Last account Debt transaction date

# DIARY

Customers Diary

Printed 07/08/2017 4:04 AM

Period: 07-Jul-2017 00:00:00 - 07-Aug-2017 04:05:00

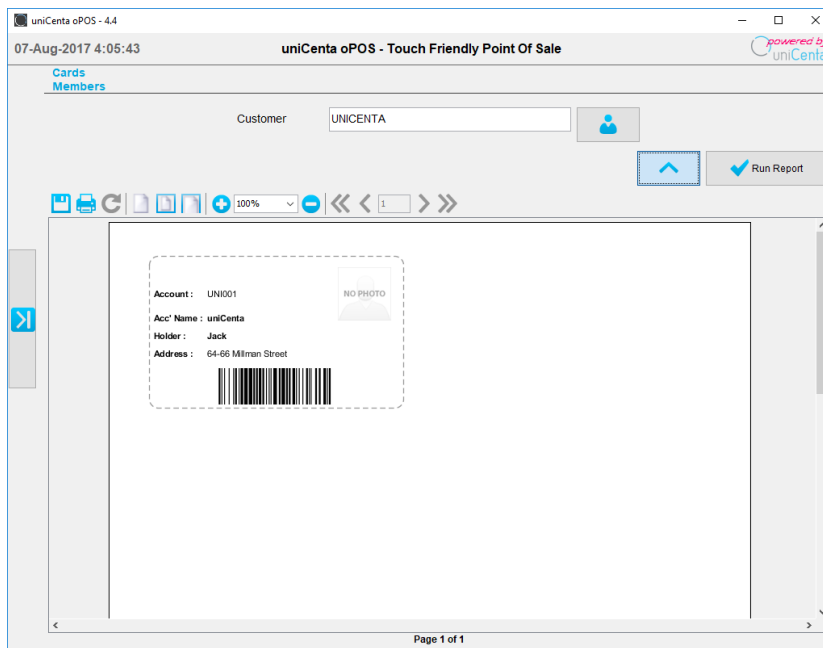
Date	Ticket	Payment	Total
07-Aug-2017	4	debt/paid	-£21.00
07-Aug-2017	4	cash	£21.00
07-Aug-2017	24341	debt	£21.00
17-Jul-2017	24213	magcard	£14.50
15-Jul-2017	24193	magcard	£10.00
15-Jul-2017	24171	magcard	£109.00
14-Jul-2017	24158	cash	£0.00
14-Jul-2017	24143	cash	£12.00
09-Jul-2017	24016	magcard	£10.00
09-Jul-2017	24012	cash	£14.25
			<b>£190.76</b>

Page 1 of 1

## Customer Sales and Payments

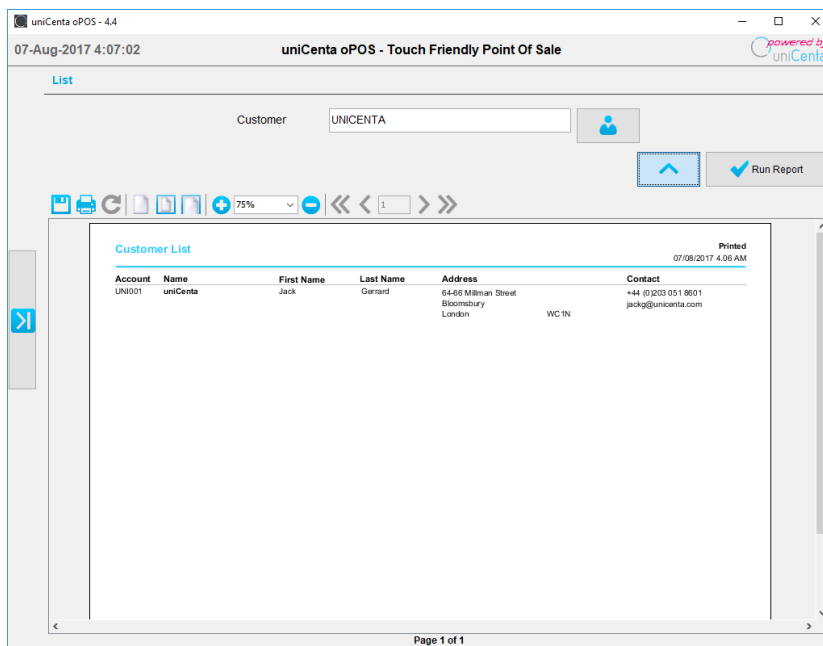
Grouped by Customer with Date descending transaction order

# MEMBER CARDS



2 column x 5 row Credit Card size format Member Cards

# LIST

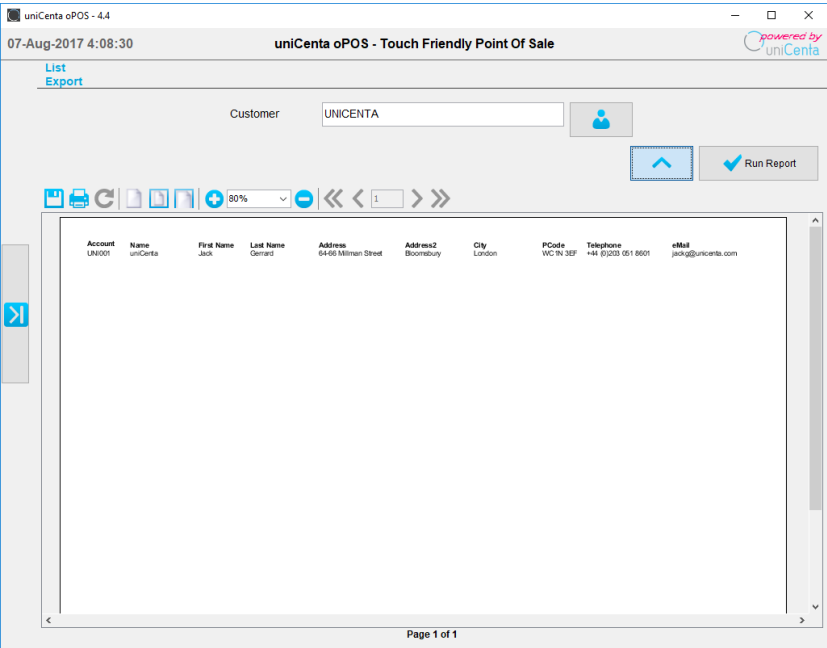


Customer main detail list

Customer Name ascending



# EXPORT LIST



A minimal layout of the Customer List

A good example use of this report is for exporting your Customer list – in CSV or Excel format – for use with an external application.

# CUSTOMER PAYMENTS

The screenshot shows the uniCenta oPOS - Touch Friendly Point Of Sale interface. The window title is "uniCenta oPOS - 4.4". The top bar displays the date and time "07-Aug-2017 4:20:17" and the application name "uniCenta oPOS - Touch Friendly Point Of Sale". The "powered by uniCenta" logo is in the top right corner.

The main screen is titled "Customer Payment". It features four action buttons at the top: a person icon, a save icon, an "i Pay" button, and a "PrePay" button. Below these, there are input fields for "Account ID" (UNI001), "Name" (uniCenta), and "Card ID" (c912780902235). A "Notes" field contains the text: "8th August - email reminder 7th August - Call re: Order pickup 6th August - Order pickup". A "Prepay Amount" field is set to "100".

At the bottom, there are three columns: "Credit Limit" (£1,000,000.00), "Current Debt" (-£100.00), and "Debt Date" (07-Aug-2017). On the right side, there is a numeric keypad with buttons for "CE", "-", "1", "2", "3", "4", "5", "6", "7", "8", "9", "0", and ".", along with a checkmark button.

The Customer Payments module is used to record monies received from a Customer other than a usual Sales ticket or Refund.

All Customer Payments are recorded and shown in Close Cash.

**Hint:** The **Notes** field can be added to or edited.



Open **Customer Finder** to select a Customer



**Save**



**Pay.** Settle Current Debt in full



**PrePay.** Enter the Prepay Amount first.  
Used to credit the Customer account for example; a deposit.

Payment

Total  Remaining

Given

Change

**Printer ON**

When either the **Pay** or **Pre-pay** button is touched the **Payment** form will open.

All Payment types are available (just like the Sales screen) except for the **Debt** tab option.

uniCenta

Printer.CustomerPaid

You can change this template in the Resources panel

Receipt: 6  
 Date: 07-Aug-2017 04:21:06  
 Account: UN1001  
 Customer: uniCenta

**Total Paid** £100.00

**Account Balance** -£100.00

**Cash**  
 Tendered: £100.00  
 Change: £0.00

Cashier: Matt

Thank You for your custom

A receipt is automatically generated for the Customer Payment received.

The Printer.CustomerPaid template can be modified (like Printer.Ticket) to suit your requirements.

Go to

Administration>Maintenance>Resources>Printer.CustomerPaid