Customer Management

Customer Management allows the User to conduct all Customer related activities and functions.
Customers are linked directly to an Account, so when the Customer Management button is selected, the User is presented with a list of all customers belonging to the account that is current.

1. View all Customer

By selecting the Customer Management button the User will be present with a list of Customers for the currently selected Account.

2. Search for a Customer

There are 2 methods to search for a Customer. The first is on the Banner Section using the Global Search function. Refer Global Search section.

The other method offers more fields and options to refine the search and can be accessed by selecting Customer Management from the Menu Bar then selecting Search Customers from the Left Menu Section.

The User can search for a Customer or a list of Customers by filtering on the following criteria:

- List Name
- Customer No.
- Title
- Customer Type
- First Name
- Last Name
- Address 1
- City/Suburb
- State
- Postcode

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- Marital Status
- Work Phone
- Home Phone
- Mobile Phone
- Email
- Gender
- Contact Method
- Status
- Date of Birth

3. Create a Customer

Customers can be created individually and contain the fields below.

All required fields are in **bold**

Field	Description
Title	One of Mr, Mrs, Ms, Miss, Dr or Other
Other	Specifiy a Title not available in above list
First Name	Customers First Name
Middle Name	Customes Middle name or Initial
Last Name	Customer Surname
Date of Birth	Customer Date of Birth
Address 1	Customer House Number and Street or House name
Address 2	Additional Street information
Address 3	Customer Area
City/Suburb	Customers City
State	Customers State or County
Postcode	Customer Postcode or Zip code
Country	Customer Country
Status	The status of this Customer either Active or Void
Customer Type	The Type of Customer one of Prospect, Customer or Account

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External	Is this an External Customer supplied by a third party.
Ext. Ref.	Third party reference code for this Customer
Contact Method	Prefered method of contact, one of Email, Mail or Phone
Company Name	Customer Company
Job Title	Customers Job Title
Work Phone	Customers Work Phone number
Home Phone	Customers Home Phone number
Mobile Phone	Customers Work Mobile number
Fax	Customer Fax number
Email	Customers email address
Gender	Customer Gender either Male or Female
Marital Status	Customer Marital Status one or Single, Married, Divorced, Widowed, De Factor or Common Law

Table 1:

4. Add a Customer Note

Notes can be used to store additional or background information. The User can create a Note by selecting the Add Note link in the Left Menu Section.

5. Delete a Customer Note

This operation is only accessible from the View Customer screen.

To perform this action:

- Select View Customer function to access the tabs (below Customer details)
- Select the Notes tab to access the operations View, Edit, and Delete
- Select Delete

6. View all Customer Notes

The User can view a summary of Notes via the View Customer screen: Notes tab - view all Customer Notes

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Refer View a Customer section.

7. Add a Customer Attachment

Attachment can be used to store large amounts of information. The User can create an Attachment by selecting the Add Attachment link in the Left Menu Section.

8. View a Customer Attachment

This operation is only accessible from the View Customer screen.

To perform this action:

- Select View Customer function to access the tabs (below Customer details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select View or the Created Date.

9. Edit a Customer Attachment

This operation is only accessible from the View Customer screen.

To perform this action:

- Select View Customer function to access the tabs (below Customer details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Edit.

10. Delete a Customer Attachment

This operation is only accessible from the View Customer screen.

To perform this action:

- Select View Customer function to access the tabs (below Customer details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Delete.

11. View a Customer

Customer details can be displayed by selecting (clicking) the Customer No. or Fullname link in the Customer Management page. Not all the Customer details will be display you can display the rest by selecting on of the tabs explained below.

11.1. Suppressions tab

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Suppressions tab - view the suppressions for this Customer

Displays:

- Type
- Date
- Delete operation

11.2. Cases tab

Cases tab - view the cases for this Customer

Displays:

- Case No.
- Customer
- Account
- Status
- Reason Code
- Logged Date/Time
- Resolution Date

11.3. Fulfilments tab

Fulfilments tab - view the fulfilments for this Customer

Displays:

- Type
- Date
- Activity
- Reference Code
- View/Edit/Delete operations

11.4. TM Responses tab

Responses tab - view the responses for this Customer

Displays:

- Telemarket
- Status
- Step
- Response Step
- View/Edit/Delete operations

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11.5. Activities tab

Activity tab - view the activities for this Customer

Displays:

- Activity No.
- Activity
- Campaign
- Account
- Status
- Step
- Start Date
- End Date

11.6. Traits tab

Trait tab - view the trait for this Customer

Displays:

- Name
- Description

11.7. Customer Lists tab

Customer List tab - view the Customer Lists for this Customer

Displays:

- List Name
- Description List
- Source
- Number of Customers in List

11.8. History tab

History tab - view the histories for this Customer

Displays:

- Field that has Changed
- Old Value
- New Value

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11.9. Notes tab

Notes tab - view the notes for this Customer

Displays:

- Date Note was created
- Date Note was updated
- Short description
- View/Edit/Delete operations

11.10. Attachments tab

Attachments tab - view the attachements for this Customer

Displays:

- Date Note was created
- Date Note was updated
- Filename
- Description
- View/Edit/Delete operations

12. Edit a Customer

This function is accessible from the Left Menu Section. It allows the User to change and update any Customer details.

> **Note:**
> Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

13. Delete a Customer

> **Note:**
> Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

14. Add a Suppresion

This function is accessible from the Left Menu Section. It allows your to add a suppression to the Customer which means they can be excluded from future marketing activities.

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15. View all Suppressions

These can be viewed from the View Customer screen.

To view them:

- Select View Customer function to access the tabs (below Customer details)
- Select the Suppressions tab

16. Delete a Suppression

This operation is only accessible from the View Customer screen.

To perform this action:

- Select View Customer function to access the tabs (below Customer details)
- Select the Suppressions tab to access the Delete operation
- Select Delete

17. Add/Remove a Trait

This function is accessible from the Left Menu Section. It allows the user to select which Traits apply to this Customer.

18. View all Traits

These can be viewed from the View Customer screen.

To view them:

- Select View Customer function to access the tabs (below Customer details)
- Select the Traits tab

19. Create a Case

This function is accessible in the Left Menu Section. It allows you user to create Case for this Customer. When you click the link you will be displayed with an input screen, a description of these fields can be found in the Create Case section.

20. Edit a Case

This can be done by viewing the Customer and then selecting the Cases tab. Click the Case Number and this case will be displayed you can then Edit the case.

21. View all Customer Cases

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These can be viewed from the View Customer screen.

To view them:

- Select View Customer function to access the tabs (below Customer details)
- Select the Cases tab

22. Delete a Case

This can be done by viewing the Customer and then selecting the Cases tab. Click the Case Number and this case will be displayed you can then Delete the case.

23. Create a Fulfilment

This function is accessible in the Left Menu Section. When you click the link a list of Activities for this account is displayed.
Only Activities which are "Active" and have been "Started" (See Change Step) can be selected.
Once an Activity is selected you will be able to fill out the Fulfilment Date (usually today) and the type (usually a request for more information).

24. Edit a Fulfilment

This operation is only accessible from the View Customer screen.

To perform this action:

- Select View Customer function to access the tabs (below Customer details)
- Select the Fulfilments tab to access the Edit operation
- Select Edit
- Update the Fulfilment details

25. View all Customer Fulfilments

These can be viewed from the View Customer screen.

To view them:

- Select View Customer function to access the tabs (below Customer details)
- Select the Fulfilments tab

26. Delete a Fulfilment

This operation is only accessible from the View Customer screen.

To perform this action:

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- Select View Customer function to access the tabs (below Customer details)
- Select the Fulfilments tab to access the Delete operation
- Select Delete

27. Create a Response/Run Telemarket

This function is accessible in the Left Menu Section. When you click the link a list of Telemarkets for this account is displayed.
Only Telemarkets which "Active and has been "Started" (See Change Step) can be selected.
Click the create link in the Operations column will take you to the Telemarket script, see Run Telemarket for instructions completing a Response.

28. Edit a Response

This function is accessible from the Create a Response/Run Telemarket (see above). If a Resposne has been created the create link is replaced with view/edit/delete operations.
It is also accessible for the View Customer screen by selecting the TM Responses tab and clicking the Edit link.

29. View all Customer Responses

These can be viewed from the View Customer screen.

To view them:

- Select View Customer function to access the tabs (below Customer details)
- Select the TM Responses tab

30. Delete a Response

This function is accessible from the Create a Response/Run Telemarket (see above). If a Resposne has been created the create link is replaced with view/edit/delete operations.
It is also accessible for the View Customer screen by selecting the TM Responses tab and clicking the Delete link.

31. Add/Remove from a Customer List

This function is accessible in the Left Menu Section. When you click the link a list of Customer Lists for this account is displayed.
There are various reasons why some Customer Lists are not available, please read the notes on the page.
Select the lists that you want this customer to be in and click the Add button. (Removing ticks from the checkboxes will remove the Customer from these lists).

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32. Update Customers

These function allows you to add attributes to multiple Customers by importing entries from a list. See an explaination of each importer below.

32.1. Update Customer Suppressions

This allows you to create Suppressions for multiple Customers by importing a CSV file with a Customer ID as the first column and the Suppression name in the second column.

32.2. Update Customer Traits

This allows you to create Traits for multiple Customers by importing a CSV file with a Customer ID as the first column and the Trait name in the second column.

32.3. Update Customer Fulfilments

This allows you to create Fulfilments for multiple Customers by importing a CSV file.
The file need to contain the following.

- Customer Id - ID of the Customer
- Date - The Date the Fulfilment was created
- Type - The type of Fulfilment e.g. Send Brochure
- Activity - The Activity to use for this Fulfilment (Optional if a unique RefCode is specified)
- RefCode - The Reference Code of the Activity to use for this Fulfilment (Optional is an Activity is specified)

> **Note:**
> If an Activity and RefCode are specified they must match with a single Activity.

33. Delete Customers

This function allows you to search for Customers that you want to Delete.
Once your search results contain the correct list of Customers click the Delete button and you will be asked to confirm your selection.

34. View Customer Lists

This function is accessible in the Left Menu Section. It allows you user to view a table of the Customer List for this Account.

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The Name, Description, Source and number of Customers in the List are displayed in this table.

35. View Customer List

To view a Customer List view the table of Customer Lists (see above) and select the desired list name.
The screen displays some of the list details and the rest are in tabs which are explained below.

35.1. Suppressions tab

This displays the Suppression for this List. Customers with the specified suppressions can not be added to the list.
e.g. Have a Direct Mail List which has Suppressions of all the Mail Types so mail doesn't get sent to Customers with invalid address.

35.2. Traits tab

This display the Traits for this List. Customers that do not have the all the specified traits can not be added to this list.

35.3. Customer tab

This displays all the Customers in this list in pages of 100 Customers.

35.4. Activities tab

This displays a list of Activities associated with Customer List.

36. Import Customers

This function is accessible in the Left Menu Section. It allows you to Import/Update Customers.
When you click the link you are shown Step 1 of the import process.

Step 1
You are given the follow options.

- Customer Type - One of Prospect, Customer or Account.
- Overwrite Customer Type - If you select this option then any existing Customers found during import will be update to the Customer Type specified.

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- Overwrite Customer Status - If you select his option then any existing Customers found during import the Status (Active or Void) in the import file will be used. (This requires that you select status in the next step)
- Usage - An explaination of the List Usages are available in the help link under the select list.

Step 2
You need to specify the CSV file you which to import.

Note:
The maximum size of the file is 2 Megabytes.

Step 3
This step allows you to map the columns in the csv file to Customer details.
Depending on which list usage has been selected some details e.g. email address are required. It is recommend to select as many details as possible so Customers can be deduped at a later date.

Step 4
You do not need to do anything in this step it simply validates the csv file against the column/detail mapping specified in Step 3.
If there are errors in the import file they are displayed and you are give an option to ignore those entries.

Step 5
> This step tries to match existing Customers in the database with those being imported. The way Customers are matched depends on the list usage selected, if no list usages is select each one is used in turn to try and find a match. (This will give most successful matches)

37. Import Customer List

This function is accessible in the Left Menu Section. It allows you to Import Customers and create a List.
When you click the link you are shown Step 1 of the import process.

Step 1
You are given the follow options.

- Customer Type - One of Prospect, Customer or Account.
- List Name - Customer List name
- Description - Customer List description
- Vendor - The Organisation/Company the provided the list
- Cost - How much the list cost

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- Expiry Date - How long you can use the list for
- Usage Frequency - How many times the list has been used
- List Source - Which sort of Vendor provided the list
- Usage - An explaination of the List Usages are available in the help link under the select list.

Step 2
You need to specify the CSV file you which to import.

Note:
The maximum size of the file is 2 Megabytes.

Step 3
This step allows you to map the columns in the csv file to Customer details.
Depending on which list usage has been selected some details e.g. email address are required. It is recommend to select as many details as possible so Customers can be deduped at a later date.

Step 4
You do not need to do anything in this step it simply validates the csv file against the column/detail mapping specified in Step 3.
If there are errors in the import file they are displayed and you are give an option to ignore those entries.

Step 5
This step tries to match existing Customers in the database with those being imported. The way Customers are matched depends on the list usage selected.

38. Create Customer List

This function is accessible in the Left Menu Section. It allows you to Create a Customers List from the existing Customers.
When you click the link you are shown Step 1 of the creation process.

Step 1
You are given the follow options.

- List Name - Customer List name
- Description - Customer List description
- Usage - An explaination of the List Usages are available in the help link under the select list.

Step 2
You need to search for the Customer that you want in the List

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Step 3
This step allows you to specify the suppressions for the list. Any Customers in the search with one or more of these suppressions will not be included in the list.

Step 4
This step allows you to specify Traits that a Customer must have to be included in the List.

Step 5
This step confirms the number of Customers that will be in this list after the Customers that are not valid for the specifed list usage, supressions and traits have been removed.

39. Create List of Fulfilled Customer

This function is accessible in the Left Menu Section. It allows you to Create a Customers List from the existing Customers that have Fulfilments for an Activity.
You are given the follow options.

- Activity - The Activities fulfilments to use to create the list of Customers.
- List Name - Customer List name
- Description - Customer List description
- Usage - An explaination of the List Usages are available in the help link under the select list.

40. Edit a Customer List

To edit a Customer List select View Customer Lists in the Left Menu Section and then select the desired Customers List. The Edit Customer List option will then be available in the Left Menu section. It allows you to Edit the Customers Lists name and description.

41. Delete a Customer List

To delete a Customer List select View Customer Lists in the Left Menu Section and then select the desired Customers List. The Delete Customer List option will then be available in the Left Menu section.

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