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Category	Technical
Course	Codes & Desc.
Version	1.0
Client	Generic
Software	2.12.0.0

Configure Customer Groups

Customer Groups are created if to give certain discounts (set up in Discount Wizard) only to customers who either:

- enter/scan a specific type of card linked to the customer group
- have an AR account linked to the customer group.

Hints and Tips

- ✓ Once you've configured a customer group, you can use it as criterion for a discount in Discount Wizard.
 - E.g. '5% off the transaction when an [xx] Card is scanned/entered' (you might insert 'staff' or 'VIP' etc)
 - E.g. '50¢ off Coke 2L for Loyalty AR customers' (identified by entering their account code on the Customer ID Menu on POS).
- ✓ Before you can set up these type of discounts, you need to apply the customer group **Code** against either:
 - the applicable customer card; refer to [Tech-2d Configure Customer Cards Fact Sheet](#). This has the quickest & broadest application, as you only have to apply it once for many customers to be eligible for the discount. You will need to duplicate the card parameters if you want to apply another customer group to the card.
 - OR each HOS/BOS Account Receivable record (on the **Loyalty** tab) that you want to receive the discount. This method takes longer, but you can add several customer groups against a customer.

Procedure to Configure Customer Groups

1.	From the HOS/BOS Tools menu, select Codes and Descriptions . <i>*Or select the Codes and Descriptions shortcut.*</i>											
2.	Click the Customer Groups tab.											
3.	Click New .											
4.	In the Code field, type the code to identify this customer group.											
5.	In the Description field, type the name of the customer group.											
6.	Click											
7.	<table border="1"> <tr> <td>To:</td> <td>then:</td> </tr> <tr> <td>add another customer group</td> <td>return to step 3.</td> </tr> <tr> <td>edit a customer group</td> <td>click the required row; the details are populated in the yellow fields. Overtyping the required text. Click Save.</td> </tr> <tr> <td>delete a customer group</td> <td>click the required row; the details are populated in the yellow fields. Click Click Yes to continue.</td> </tr> <tr> <td>finish</td> <td>click </td> </tr> </table>	To:	then:	add another customer group	return to step 3.	edit a customer group	click the required row; the details are populated in the yellow fields. Overtyping the required text. Click Save .	delete a customer group	click the required row; the details are populated in the yellow fields. Click Click Yes to continue.	finish	click	
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8.	Apply the customer group against the card configuration or the AR account. <i>*See Hints and Tips.*</i>											