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Category	Technical
Course	POS Config.
Version	1.0
Client	Generic
Software	2.14.100.0

Configure Advanced Customer Search

Your business can define what search fields are listed on the Advanced Customer Search screen at POS, and what fields display in the search results, including order placement on the screen.

Procedure to Configure the Advanced Customer Search

Hints and Tips

- ✓ A register operator uses the Advanced Customer Search function when a loyalty or account customer forgets their card or account number.
- ✓ You can configure up to four search criteria buttons and four search results columns to display at POS.
- ✓ You can customise the order and name of each search criteria and search results columns.
- ✓ The **Label** name is the caption that will display on the search criteria screen.
- ✓ Sample search at POS (accessed from the MISC function):



1.	From the HOS/BOS System menu, select Location Setup .									
2.	If a Head Office user, select the Location that you want to define. <i>*You'll be defining the configuration for all stores at and below the level that you select.*</i>									
3.	Double-click the Configure icon. <i>*If a HOS user, click Yes to continue.*</i>									
4.	Click the Account -> Customer Search tab.									
5.	Complete the required steps to edit the search buttons displayed at POS: <ul style="list-style-type: none"> • Click the Buttons tab. <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">To:</th> <th style="width: 70%;">then:</th> </tr> </thead> <tbody> <tr> <td>add a search criteria button to display at POS</td> <td>in the Available Customer Details section, click the applicable field. Click <input type="checkbox"/> against the position you want to insert the button. <i>*You'll probably also want to change the Label name.*</i></td> </tr> <tr> <td>remove a search criteria button</td> <td>against the applicable field name, click <input type="checkbox"/>. <i>*The field is moved to the Available Customer Details section.*</i></td> </tr> <tr> <td>change the name of a field</td> <td>In the Label field, overtype the existing text with your preferred description.</td> </tr> </tbody> </table>	To:	then:	add a search criteria button to display at POS	in the Available Customer Details section, click the applicable field. Click <input type="checkbox"/> against the position you want to insert the button. <i>*You'll probably also want to change the Label name.*</i>	remove a search criteria button	against the applicable field name, click <input type="checkbox"/> . <i>*The field is moved to the Available Customer Details section.*</i>	change the name of a field	In the Label field, overtype the existing text with your preferred description.	
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Hints and Tips

- ✓ The **Size** determines the width of the column for each field shown in the available display space on the POS.
 - The size you set depends on the **screen width** and the **% space for left side** (set on the System -> System tab). E.g. if 900 wide and 60%, the dimensions shown in the instructions work well.
 - If a customer detail is longer than the width allocated, the overhang will be cut-off.

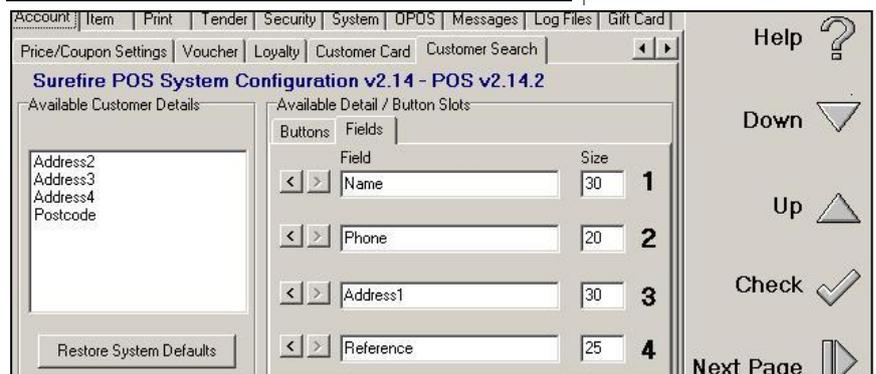
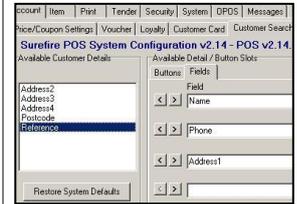


- ✓ If you're a Head Officer user, the saved configuration is transmitted to the store/s when **HOS Export** and **HOS Import** are next run.
- ✓ The configuration is applied to the registers when **File Transfer** next runs (usually every few minutes) and after the POS.exe has been restarted.

6. Complete the required steps to edit the columns that display on the search results screen:

- Click the **Fields** tab.

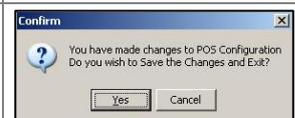
To:	then:
add a column to the search results screen	in the Available Customer Details section, click the applicable field. Click against the position you want to insert the button.
remove a column from the search results screen	against the applicable field name, click . <i>*The field is moved to the Available Customer Details section.*</i>
set the width of the search result columns	in the Size field against the applicable field, type the number of pixels for the field. <i>*See Hints and Tips.*</i>



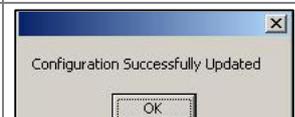
7. Click **Save**.



8. Click **Yes** to continue.



9. Click **OK**.



10. Click **Close** to exit Location Setup screen.

