There are often situations in your business where you need to gather some basic information from your cash customers.

For example, when you special order merchandise for them or offer a layaway payment option, you need to be sure you can contact them if needed.

Tracking and auditing customer returns requires that you maintain basic data such as name and phone number.

You may also sell pesticides or allow customers to purchase products that are exempt from state sales tax. These instances can require that documentation be maintained for various government agencies.

Option ID 1498 will have to be set to ‘Y’ to access Flexible Consumer Information Maintenance.

There are some additional options that are affected by enabling this flag so be sure to read the attached document located in the ‘Course Detail’ portion of the Training on Demand ‘Course Catalog’.

To begin set up of this feature, go to Eagle browser click ‘File’ and then choose ‘Configure’.

Click the ‘Flexible Consumer Information’ button, here.

A dialog box will open displaying the events available to customize the information captured at Point of Sale.

Some of the events are, starting a Special Order, Layaways, and creating an Estimate or Order.

You can also choose totaling a return, the creation of a tax exempt transaction or the sale of certain tally items.

Totaling a transaction for a 'customer that requires information' can be a trigger just as it always has been in the past based on your settings for the 'Prompt in POS' flag in Customer Maintenance.

You can also direct your Eagle system to prompt clerks for more customer information based on Consumer Information Codes. We will discuss their setup later in this lesson.

Let's look at some information that you might want to gather when beginning a Special Order.

Before ordering merchandise specifically for a customer, you will need to be sure you have their basic contact information such as Name, Address and Phone Number.

When you click the drop down arrow next to the 'Name' field, you are given the choices 'Blank', 'Required' and 'Optional'.

Based on your selection here, the clerk may not be prompted to enter anything, may be required to enter data before continuing with the transaction or have the option of entering data.

Capturing an email address might be handy for letting your customer know their merchandise has arrived. You could set the Email Address field to 'O', Optional.

This way, the clerk can ask the customer for this information, but the customer can always decline to provide it and the transaction can continue.

When you click 'OK', you will be returned to the Flexible Consumer Information Maintenance dialog box. You can see that there is now a 'Yes' value in the 'Enabled' field.

You can click 'Cancel', to close this dialog box.

When you begin a Special Order transaction in Point of Sale you will now see the interactive dialog box requesting the information you specified.

From POS, begin a Special Order for your default cash customer and then move to the posting area.

The clerk is now asked to enter the required fields of ‘Name’, ‘Address’ and ‘Phone Number’.

These are denoted with an asterisk.

The Email Address is available for entry but does not require input for the clerk to continue with the Special Order.

Only those fields that are not already populated in Customer Maintenance will appear with a blank space for the clerk to enter information.

For example, if the Special Order is for an existing customer, the ‘Name’ and ‘Address’ information will appear here in the dialog box.

Only those fields that were identified as ‘Required’ or ‘Optional’ information will appear at POS.

For example, we may only require the capture of ‘Driver’s License’ number for Tally Type X records.

When that item is sold, this is the only information that is requested of the cashier.

You can also choose from events that are triggered by the ‘Consumer Information Code’ field, found on the codes tab in IMU.

These 9 codes can be set for individual items that require the capture of customer statistics whenever they are purchased.

For example, perhaps you wish to track items that have a manufacturer’s warranty.

You can use the Item Code Update Report, RICU, or Inventory Import Tools to update this flag.

You can also update it manually.

Display the sku in question in Inventory Maintenance.

Navigate to the ‘Codes’ tab and click the hot link labeled ‘Additional Codes’.

The ‘Consumer Info Code’ dropdown box is located on the far right.

Select the number that your business has defined to identify warranty items. Any of the codes can be used.

You will decide if warranty items use code 1, code 2, code 3, etc.

Now we can set up our Flexible Consumer Information configuration to request or require specific customer statistics when this item is sold at Point of Sale.

Open the maintenance screen and choose the line that references ‘Consumer Info Code 5’.

Click ‘OK’.

Here, you can identify which fields you will require the POS clerk to capture and which fields are optional.

For our example we will require the Name, Address, City, State and Zip Code field.

Phone Number will also be required.

An Email Address will be an optional entry.

Change the Description to reflect the function of this code so that you can easily assign it to skus in the future.

When this sku is sold at Point of Sale and the transaction is totaled, the clerk will see the 'Required Consumer Information' box.

Fields denoted with an asterisk will require data input in order for the transaction to be completed.

The Email Address field, which we set to 'Optional', does not have an asterisk and does not require any input.

Once the information is added, press 'OK' and total the sale as you normally would.

The data collected for Orders, Special Orders, Estimates and Layaways can be seen in the Point of Sale Document Viewers.

Captured Email Addresses appear in the main view, here.

When a transaction is recalled or printed, the Name, Address and Phone Number that were entered by the clerk will be displayed.

If a sku is sold that contains a Consumer Information Code, and that code has been set to require additional data, you can view those fields in the Quick Recall viewer.

You will also see any Name, Address or Phone Numbers captured when you display the individual transaction.

If you need to email an invoice from QuickRecall, the system will use the Email Address that was just collected at Point of Sale.

If you are using digital receipts for cash customers, again, the system will use the Email Address that was collected during the transaction.

The Flexible Consumer Information function can be a useful tool to capture and utilize customer contact information.

Regulations and protocols can be maintained by prompting your clerk to capture certain data that is required during the sale of defined products.

Whether the triggers are based on specific skus or on specific transaction types, this utility is easy to set up and even simpler to use at Point of Sale.