

System PM 100

Managing Customers

Version 1.0

DESIGNA

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1 General

The menu point **manage customers** in the main menu **master data** makes it possible to manage the ticket owners of season parker tickets, debit cards or function cards.

In addition, this menu point covers all owners of value and time cheques.

In the case of credit card and ec card processing, the owner himself has to be entered as customer (with full address and bank details) in order to stipulate the payment recipient for the data carrier transfer procedure.

Every customer is allocated a customer number. This customer number also stipulates the sequence in which the customer data records are displayed.

Customer data records can be changed and added in this menu point. Customers can only be deleted when all the customer's cards have been deleted.

2 Example input mask manage customers

```

                                Manage customers
                                Date [ 3. 3.99]

Customer no. [ 101]   Customer / car number [Mustermann   ]
                    First name [Manfred           ]
Company no. [ 100]   No. of customers [           ]
Company name [Taxiservice   ]   Birthday [15.09.56]
                                Profession [Taxidriver   ]

Bank connection [Kiel-Bank           ]   City [24107 Kiel           ]
Bank acc. no. [123456789   ]   Street [Falnuer Weg 3           ]
Bank code no. [21051275   ]   Phone [0431/5336 0           ]

                                last value cheque [           ]
                                last time cheque [           ]

                                Customer has cards

s=search n=next p=previous c=chan a=add d=delete k=cards co=counter e=end

                                Which option do you require?

```

This example shows a customer Manfred Mustermann with customer number 101, who is allocated to a company with the number 100. Tickets have already been coded for this customer. The customer Mustermann and the company Taxiservice can have their own tickets (season parker tickets and debit cards).

All data in this input mask can be changed in retrospect, apart from the data for the customer number, the last value and time cheque.

3 Example display mask customer tickets

```

Customer-cards
Date [ 3. 3.99]

Customer no. [ 101] Customer name [Mustermann ]

No.    CP-no.    CardNo.  Grp-No.
[ 1]   [10]     [ 30]   [ 2] SP-card      Blackl Cancel Season
[ 2]   [11]     [ 4]   [ 0] Function card
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]
[ ]    [ ]     [ ]    [ ]

m=more e=end

Which option do you require?

```

In this example, 2 tickets are listed for the customer Mustermann, which have been coded to his customer number. The first ticket is a season parker ticket in season parker group 2 in car park 10 with ticket number 30. It has been blacklisted and then deleted. The second ticket is a debit card with card number 4 which has been coded for car park 11.

4 Example input mask customer counter

```

Customer-counter
Date [ 3. 3.99]

Customer no. [ 101] Customer name [Mustermann ]

No.    Slave CP-no.    Car park name    Max-SSP present
[ 1]   [ 1] [ 1]   [Stadthalle]    ] [ 5] [ 2]
[ 2]   [ 1] [ 2]   [Rathaus]      ] [ 0] [ 0] not active
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]
[ ]    [ ] [ ]   [ ]            ] [ ] [ ]

m=more c=chan e=end

Which option do you require?

```

In the customer counter input mask, in this case all free parking lots for the customer Mustermann are displayed.

The first customer counter at data headquarters 1 is set to car park 10 (Stadthalle). Of the maximum 5 season parker lots, at the moment 2 are occupied. In the data headquarters 1 of car park 11 (Rathaus), no customer counter has been set. Prerequisite for customer-related counting is that the option "**customer-related counting**" has been set to y=yes in the season parker group for this customer in car park 10 (Stadthalle) (see documentation for season parker prices).

5 Input mask manage customers

```

                                Manage customers
                                Date [ 3. 3.99 ]

Customer no. [      ] Customer / car number [      ]
                                First name [Manfred      ]
Company no. [ 100] No. of customers [      ]
Company name [Taxiservice ] Birthday [15.09.56]
                                Profession [Taxidriver      ]

Bank connection [Kiel-Bank      ] City [24107 Kiel      ]
Bank acc. no. [123456789 ] Street [Falnuer Weg 3      ]
Bank code no. [21051275 ] Phone [0431/5336 0      ]

                                last value cheque [      ]
                                last time cheque [      ]

s=search n=next p=previous c=chan a=add d=delete k=cards co=counter e=end

                                Which option do you require?:

```

Customer number
(Input necessary)

Index number of the customer. All customer data are filed under the customer number. The link to the ticket data is only possible via the customer number. It cannot be changed in retrospect.

Customer name / reg. no
(Input necessary)

Name of the customer or company or car registration number. The data in this field can be changed in retrospect.

First name

Customer's first name.

Company no. If the customer is the employee of a customer or is listed under a higher customer, the customer number of the company or higher customer has to be entered here. In the case of companies or single customers, a zero or the actual customer number is entered here.

Number of customers

Number of employees in this company or this higher customer. If an employee is added to or deleted from this company, the number in this field is changed automatically. As long as the number in this field is larger than zero (so that there are still employees), the data record of the company cannot be deleted.

Company name

Name of the company or higher customer. The company name is entered automatically. Inputs are not possible in this field.

Date of birth

Date of birth of the customer.

Profession

Profession of the customer.

Bank details

Customer's bank details (see box for credit card/ec processing)

Bank code

Bank code of the bank (see box for credit card/ec processing)

Account number

Customer's account number (see box for credit card/ec processing)

Postal code/city

Postal code and city of the customer (see box for credit card/ec processing)

Road

Customer's road (see box credit card/ec processing)

Phone

Customer's phone number

Manage customers	Input mask manage customers
Last value cheque	No. of coded value cheques for this customer. Inputs are not possible in this field.
Last time cheque	No. of coded time cheques for this customer. Inputs are not possible in this field.

Several entries for bank details and address are possible for each customer.

Credit card/ec processing:

For credit card/ec processing , the owner must enter his own data (i.e. bank details, bank code, account number, postal code, city and road), so that the data of the payment recipient can be entered by the system during the data carrier transfer procedure .

5.1 Selection options

s=search	Search in a customer data record stating the customer number or customer name in the manage customer mask
n=next	Displays the next data record in the manage customer mask.
p=previous	Displays the previous data record in the manage customer mask.
c=change	Changes the current data record in the manage customer mask.
a=add	Adds a new data record in the manage customer mask
d=delete	Deletes the current data record in the manage customer mask
k=cards	Displays all cards which have been coded for this customer. See chapter 6 display mask customer cards .
co=counter	Displays all customer-related counters for this customer. See chapter 7 input mask customer counter
e=end	Quits the manage customer mask

6 Display mask customer cards

```

Customer-cards
Date [ 3. 3.99]

Customer no. [      ] Customer name [      ]

  No.   CP-no.   CardNo.  Grp-No.
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ]

m=more e=end

Which option do you require?

```

This display mask **customer cards** displays all cards of the current customer data record. Input is not possible in this mask.

Customer number	Current customer number from the manage customer mask
Customer name	Current customer name from the manage customer mask.
No.	Consecutive numbers of the cards.
CP No.	Car park number for which this card has been coded
Card No.	Card number of the season parker ticket, debit or function card.
Grp No.	Displays the season parker group number for season parker tickets.

The type of card and the card status information is shown in a separate area.

6.1 Selection options

m=more	Displays further customer cards
e=end	Quits the customer card mask and return to the manage customer input mask.

7 Input mask customer counter

```

                                Customer-counter
                                Date [ 3. 3.99]
Customer no. [      1] Customer name [DESIGNA      ]
  No.   Slave CP-no.      Car park name      Max-SSP present
[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
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[ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

                                m=more   c=chan   e=end
                                Which option do you require?

```

In the **customer counter** input mask, customer-related counting for season parker tickets of the current customer is activated or managed.

The point of customer-related counting is to code a number of season parker tickets for one customer, but only releasing a lower number of parking lots (max. SP) for this customer. If all parking lots for this customer are occupied, all other tickets for this customer are rejected at the entry until more parking lots are free.

Prerequisite is that customer-related counting has been prepared for this season parker group.

Customer number	Current customer number from the manage customer mask.
Customer name	Current customer name from the manage customer mask.
N.o	Consecutive number of the car parks for which customer-related counting can be activated.
Slave	Number of the data headquarters (master or slave) of the car park for which customer-related counting can be activated.
CP No.	Car park number for which customer-related counting can be activated.
Car park name	Name of the car park for which customer-related counting can be activated.
Max SP	Maximum number of season parkers allowed to drive into the car park.
Present SP	Current number of season parkers already present in the car park.

7.1 Selection options

m=more	Display more data records
c=change	Change the customer-related counter
e=end	Quits the customer counter mask and return to the manage customer input mask.

8 List of key words

a=add	7
account number	6
bank code	6
bank details	6
c=change	7
car park name	9
car registration	6
Card no	8
co=counter	7
company name	6
Company no.....	6
CP no	8
CP No.....	9
credit card/ec card processing.....	4
credit card/ec processing	7
current number.....	9
customer cards	8
customer name	8, 9
Customer name	6
customer number	6, 8, 9
customer-related counter	7
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d=delete	7
data carrier transfer procedure	4, 7
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date of birth	6
display mask customer cards	8
e=end	7, 8
First name	6
Grp No.....	8
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k=cards	7
last time cheque	7
last value cheque	7
m=more.....	8
manage customers	4
master	9
master data	4
Max. SP.....	9
Maximum number	9
n=next	7
No.....	8
No.....	9
Number of customers	6
owner	4
p=previous	7
payment recipient.....	4, 7
phone	6
postal code.....	6
postal code/city	6
present SP	9
profession	6
reg. no	6
road	6
s=search	7
Slave	9
ticket owners	4
time cheque	7
time cheques.....	4
value and time cheques	4
value cheque.....	7