You will learn:
- *How to manage the customer base,*
- *How to add new customers to database,*
- *How to create additional customer statuses,*
- *What functionalities are located in the "Other" tab,*
- *How to create custom fields in the "Customers" module.*

This manual includes:

1. Managing customer base

Starting from KWHotel 0.47, the "Customer base" module has been moved to Tools > Customers.

By default, the module presents a list of 20 customers recently added to KWHotel database.

You may change this limit by using an option located in the bottom of the screen **(1)**.

The program also allows to display customers who were recently added to any reservations.

To do so, press the "Sort by last reservations" button **(2)**.

The "Customers" module allows you to search customers by their name or address.

The following actions can be performed in the "Customers" module:

"Export to .CSV (for Excel)" - lets you export the list of currently displayed customers to a .CSV file.

Using this option opens a new window. There you may select which columns would you like to export.

To finish the export procedure, press the "OK" button.

ATTENTION! In the bottom of the window three types of templates can be found:

- **Default** (no column is selected for export)

- **Google** (automatically selects columns accepted by the Google calendar)

- **Own** (lets you create a custom template and save it using the "Save own" button).
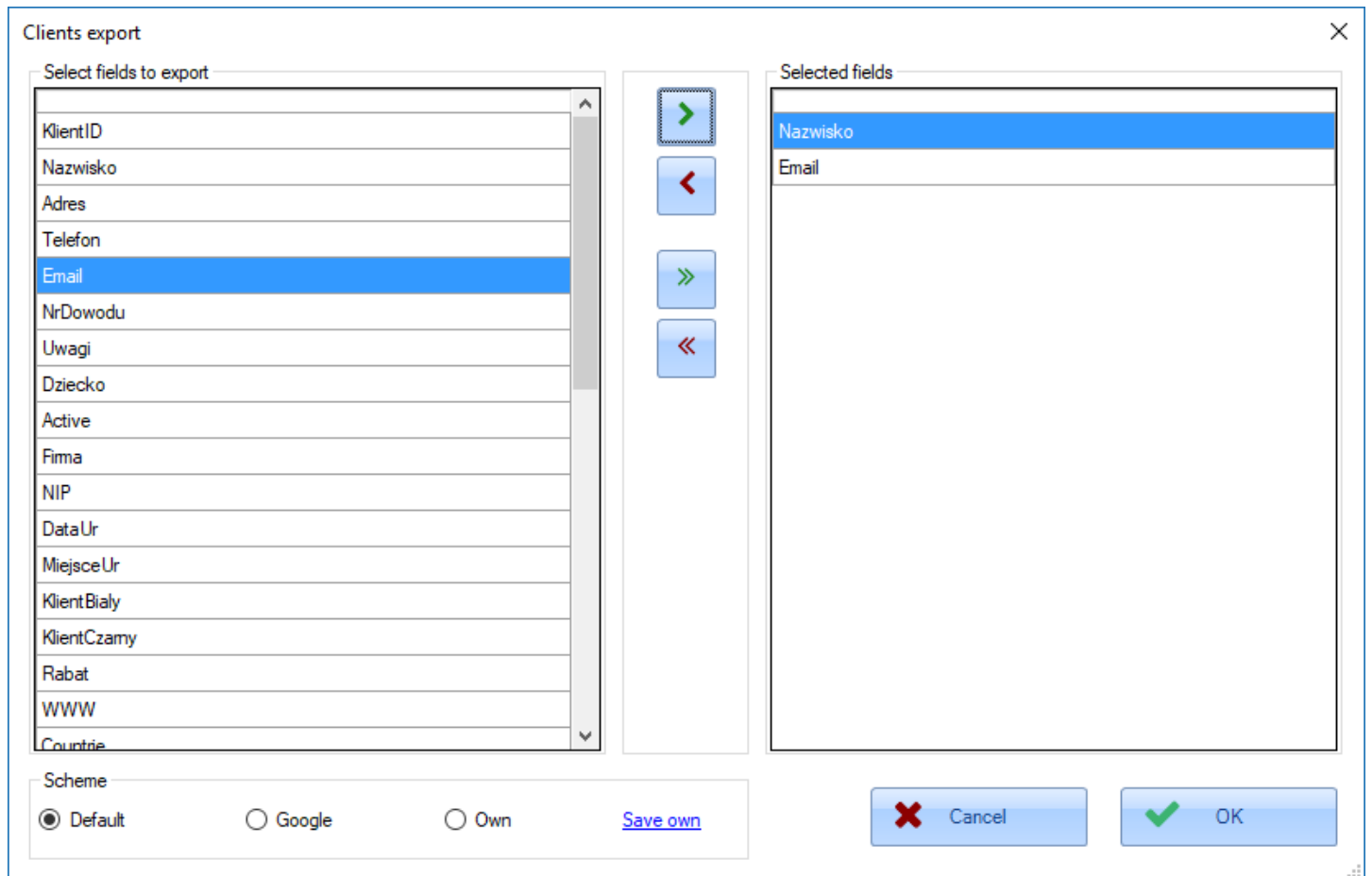
"Import customer base from the .csv (Excel)" - lets you import a customer base from a self-created .CSV file.

Using this option will open a new window. First we need to load a file containing your customer base.

To achieve that, select the encoding type of your file **(1)**. Then press the blue folder icon **(2)** and choose a file of your choice.

Once it has been loaded, select which field in KWHotel has an equivalent in the imported file **(3)**.

As you continue adding more mappings, KWHotel will reveal how the import will look like **(4)**.

When the mapping process is complete, press the "Save" button **(5)**. Customers will be imported to KWHotel.

ATTENTION! If the names of fields in the imported file are named the same way as fields in KWHotel, you can press the "Auto" button **(A)**.

KWHotel will automatically perform the mapping for you.
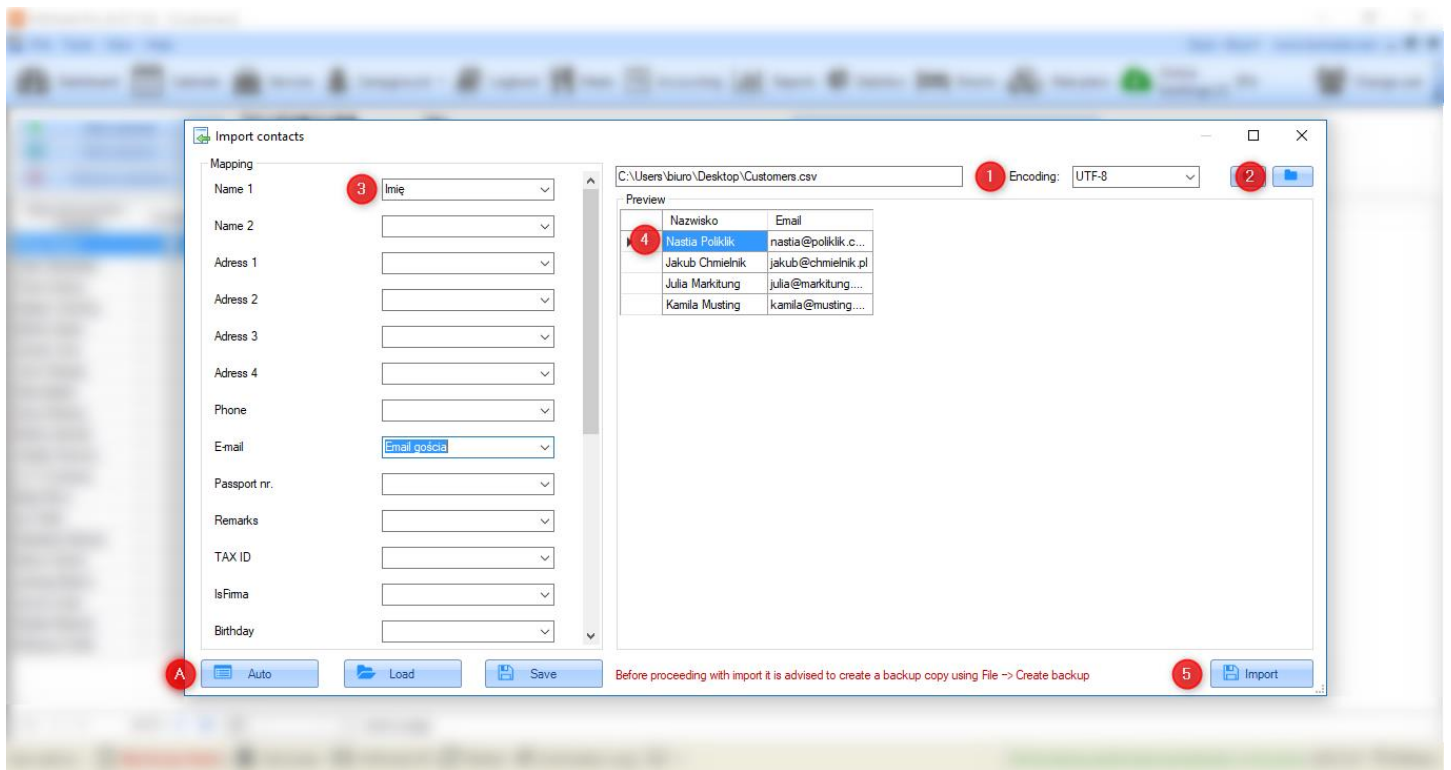
"Add customer" - lets you add new customer to database. This function will be explained in detail in the following chapter.

"Edit customer" - lets you edit the existing customer.

"Remove customer" - lets you remove customer from a database. If you delete a customer assigned to any reservation, KWHotel will hide him in a database.

His data will still be visible in a reservation window.

2. Adding customer to database

Customer window contains the following options:

Basic information (1):

- Customer status (non-corporate or company)

ATTENTION! If you would like to assign company to a non-corporate person, click the green plus icon. In the newly opened window type company data and press "Save".

Company data will be assigned to a customer (in the "Company" field the greyed-out company name will be displayed).

In the reservation calendar such client will be presented both with a personal name and his company name.

- Name and surname

- Company

- Social security

- Address

- Phone

- Email

- ID / Passport

- Nationality

- Gender

- Birth date

- Birth place

- Comments

Additionally, the "Company" tab contains the following data:

- Tax ID

ATTENTION! By default, company`s tax ID is searched in the European Union`s database.

If tax ID is found there, it will be marked in green and company data can be downloaded.

The red color means that company was not found in the EU database.

You may disable the automated EU database search in the Tools > Configuration > Other > select the "Do not check the EU VAT" option.

- Business Registry No.

- Other

Customer search (2)

Presents the results of customer search. To begin the search process, insert at least 4 characters into one of the following fields:

- Name and surname

- Social security

- Address

- Phone

- Email

- Company

- Tax ID

Attention! If you search for a name consisting of less than 4 characters, use the "Space" button on your keyboard (i.e. {space}Ian). This hint works for all fields in this window.

When KWHotel presents the search results, select the customer of your choice. Once you have done it, you will also see his reservation history **(3)**.

If you wish to edit such reservation, select it on the list and press the "Edit selected reservation" button.
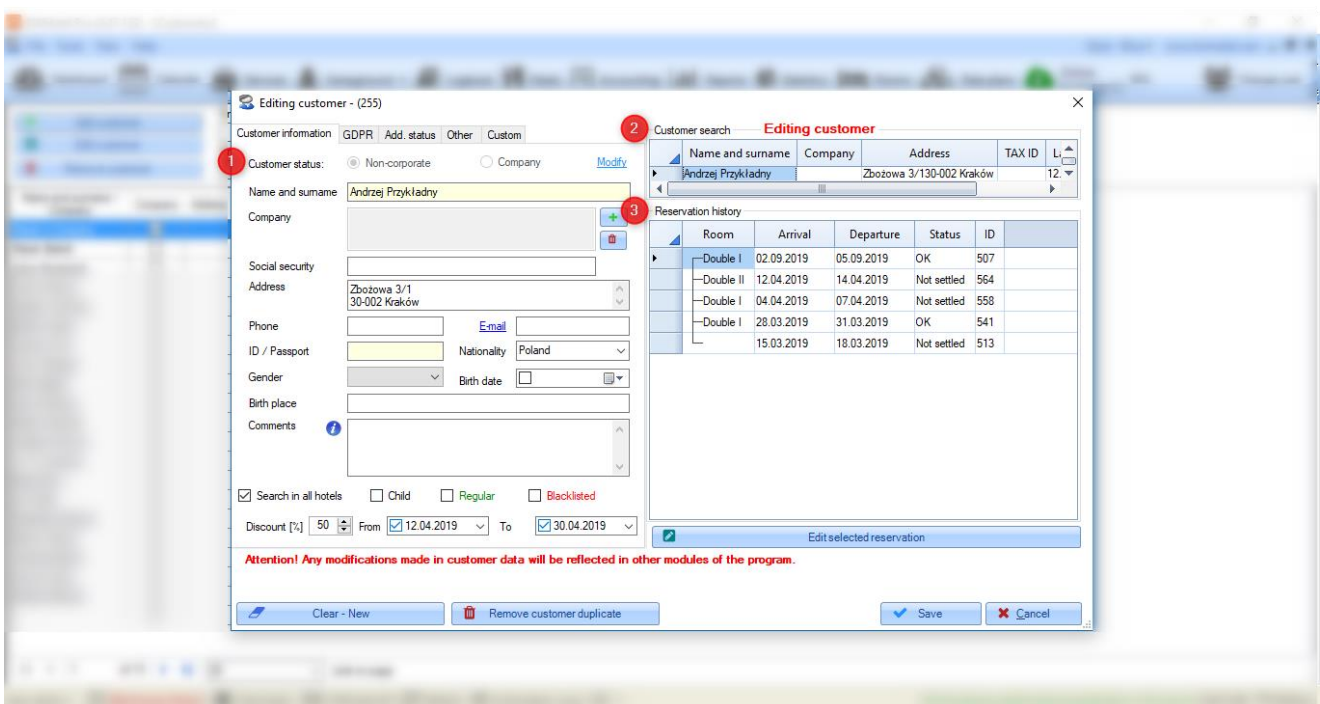
***** Remaining functions *****

In the bottom part of the customer modification screen you may find the following options:

Search in all hotels - enabled by default. If you disable it, KWHotel will restrict its search to the currently opened property.

Child / Regular / Blacklisted - lets you assign additional statuses for the given customer.

Selecting the "Regular" option will be marked green in a reservation window. The "Blacklisted" customer will be marked red.

Discount (%) - lets you assign a temporary, percentage-based discount to your customer.

To achieve that, insert a discount value, select a validity date and selecty changes.

Such discount will be automatically included in a reservation window.

Clear - New - erases all inserted customer information.

Remove customer duplicate - deletes the currently opened customer profile. You need to type the customer ID that will replace the currently deleted account.

ID of the given customer can be found in the upper left corner.

3. Creating additional customer statuses

Additional customer statuses (i.e. VIP, tourist) can be created in a customer modification screen > "Add. status" tab.

Step 1. Press the "Edit customer status" button.

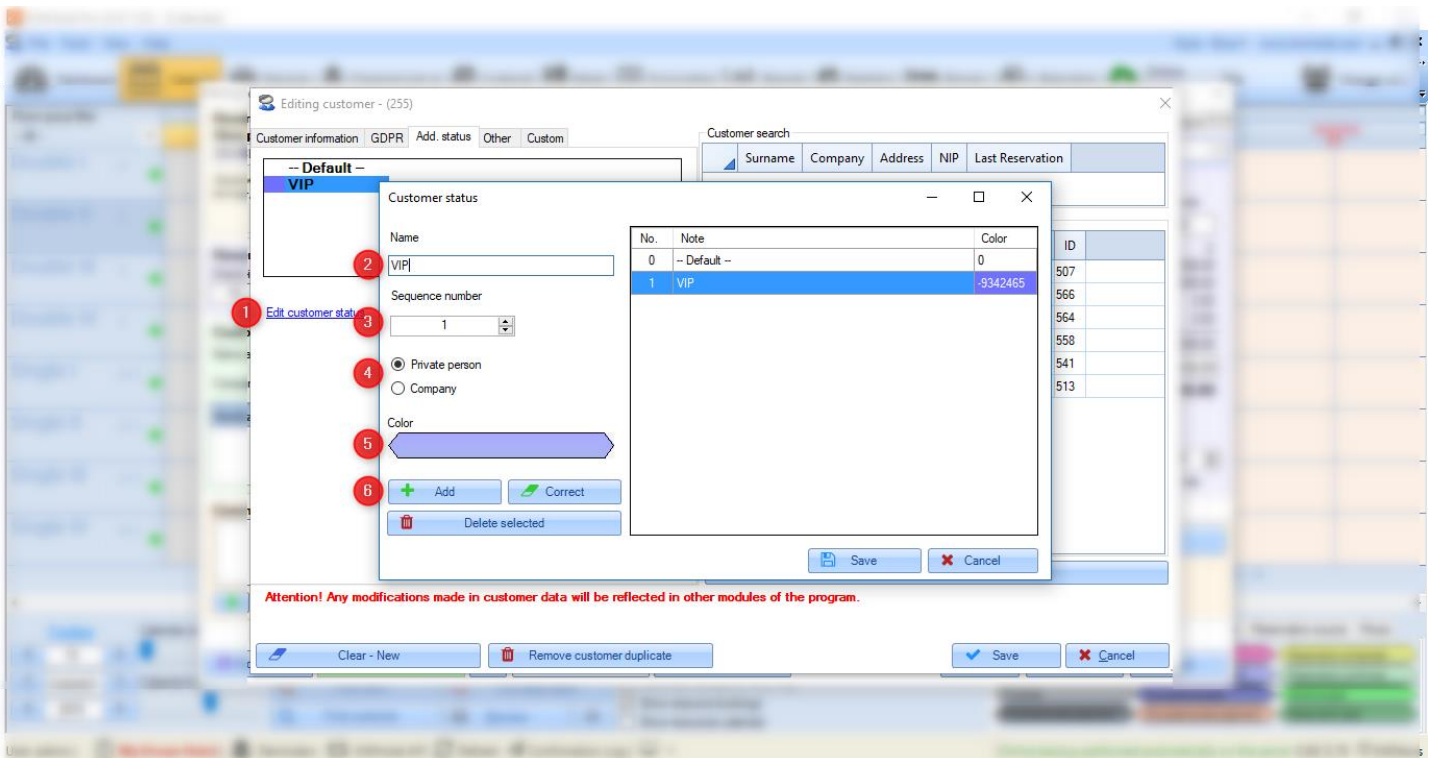**Step 2**. Insert customer`s status name.

Step 3. Type the sequence number. It will the determine the order of displaying your status on the list of statuses.

Step 4. Select if the given status should be available for private persons or for companies.

Step 5. Pick the status colour.

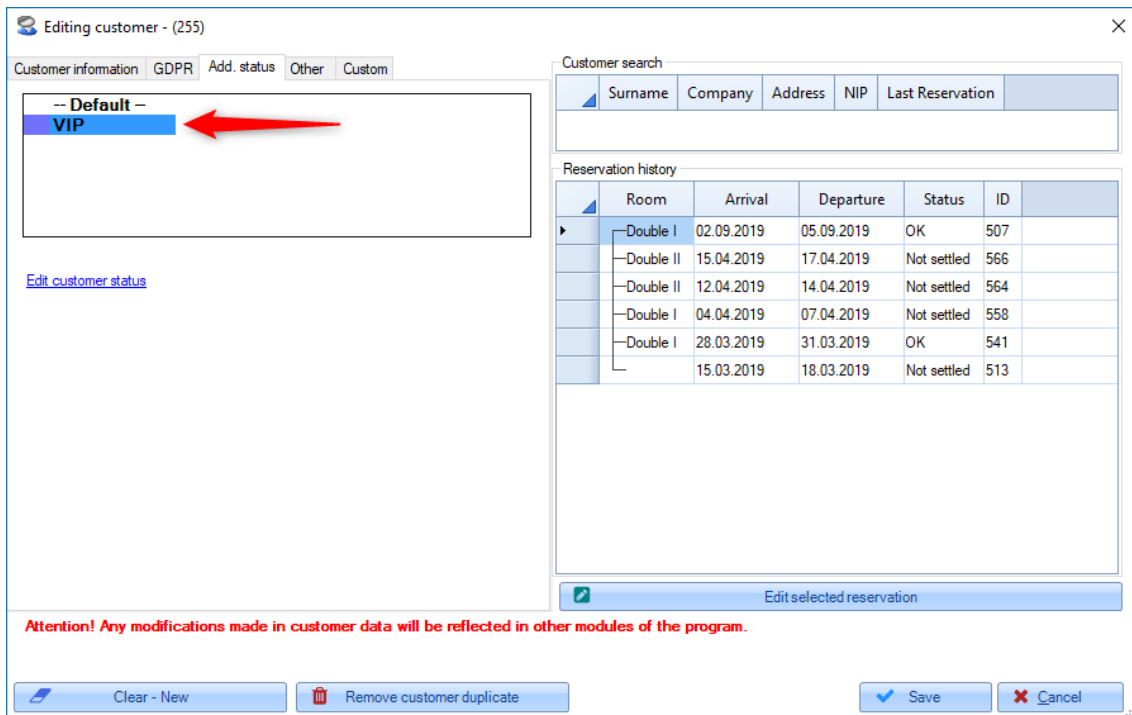**Step 6**. Press the "Add" button; status will be added to the list, located on the right side.
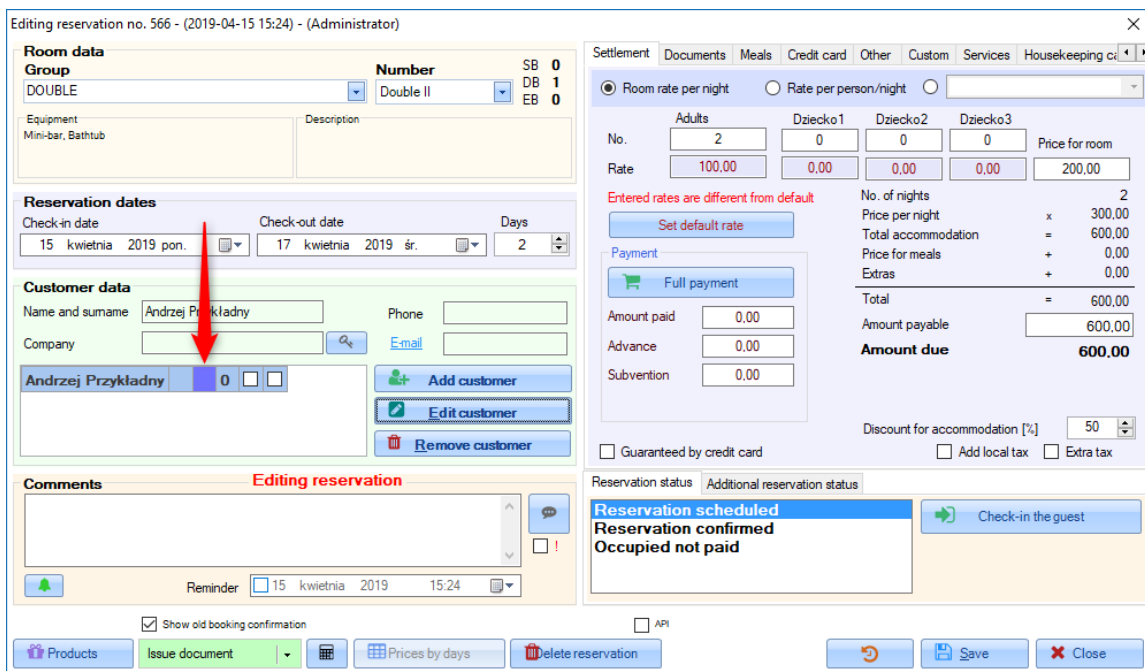
To correct a customer`s additional status, insert all previously mentioned data, then select the status on the list and press the "Correct" button.

To apply the newly created status, select it from the list and save changes.

The selected status colour will be displayed next to the customer`s name.

4. Explaining the "Other" tab

The "Other" tab, located in a customer creation screen, includes the following functionalities and data:

Load picture - lets you upload a customer`s picture.

ATTENTION! To upload images, an image storing folder must be created first.
This can be done in Tools > Configuration > Other > Page 2 > "Default associated files folder path".

Symbol - lets you insert a customer symbol.

User ID - displays ID of the given customer. It can also be viewed in the upper left corner of the customer creation screen.

Customer added by - displays user who added the given customer to a database.

Date of creation - display the date when the given customer was added to a database.

Issued documents summary - allows to display documents that were issued for the given customer.
To achieve that, simply select the time range and desired document type (recipt, invoice, bill). Then press the "Show report" button.

This report can also be exported to .CSV file.

5. Creating custom fields in the customer creation window

In the "Custom" tab you may create additional fields to be used when adding customer.

Step 1. Press the "Add value" button.

Step 2. Insert a name for your custom field.

Step 3. Optional. Put a default value for this field. It will be automatically inserted in this field.

Step 4. Choose a field type. There are following types to choose from:

String - lets you type text. In case you select this field, you may also limit the number of characters that can be typed here.

Number - lets you only type numerals.

True / false - lets you choose only between "True" and "False".

Custom choice - lets you insert your own choice options. To do so, insert a desired value in a field below and press the green plus icon.

Date Time - lets you only choose a date.

Step 5. If you wish the given field to be obligatory, mark the "Required field" option.

Step 6. Save changes.