

MANAGING THE CUSTOMER BASE

You will learn:

1. What customer information does KWHotel store and where
2. How to quickly find your customer in the program
3. How to add and modify data of your customer

1. Customers module - details

The Customers module was designed to allow you a quick and effective search of your guests. It consists of two parts – search criteria and filters and search results:

1. Search criteria and filters

Find customer by name – each typed character will narrow the number of displayed results

Find customer by address – each typed character will narrow the number of displayed results

Add a new customer – opens the customer creation window

Edit a selected customer - allows you to modify data of the chosen customer

Remove a selected customer – removes customer from the database

Pay attention:

Removing customer from the database will not erase his data from the reservation screen.

View:

Last 60 customers who booked a room

Last 60 customers added to the database (option enabled by default)

All (loading may take a few minutes)

Last but not least, there are **export and import options:**

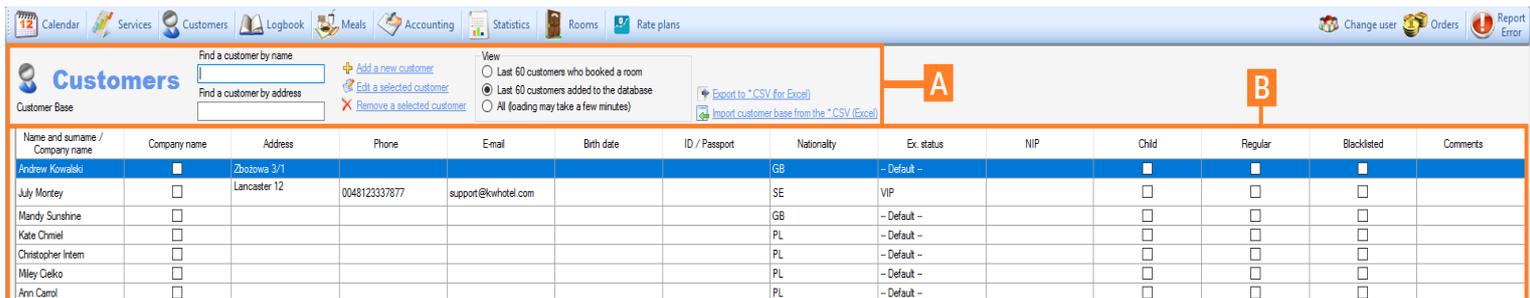
- Export to .CSV (Excel) – exports the currently displayed customer data to the .CSV file.
- Import customer base from .CSV – allows you to import your existing customer data to KWHotel. The imported file must be prepared in a way specified by the program. You can view the specification by clicking “How should the .CSV file look like?”.

2. Search results

The search results display the most important information about your guest including:

- Name of the customer or company
- Address
- Phone
- Email
- Birth date
- ID / Passport
- Nationality
- Extra customer status
- TAX ID
- Customer status
- Comments
- Additional customer field

If you double click the customer, it will be possible to modify his data.



Name and surname / Company name	Company name	Address	Phone	Email	Birth date	ID / Passport	Nationality	Ex. status	NIP	Child	Regular	Blacklisted	Comments
Andrew Kowalski	<input checked="" type="checkbox"/>	Złotowa 3/1					GB	- Default -		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
July Montey	<input type="checkbox"/>	Lancaster 12	0048123337877	support@kwhotel.com			SE	VIP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Mandy Sunshine	<input type="checkbox"/>						GB	- Default -		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Kate Chmiel	<input type="checkbox"/>						PL	- Default -		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Christopher Intem	<input type="checkbox"/>						PL	- Default -		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Miley Cieko	<input type="checkbox"/>						PL	- Default -		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ann Carol	<input type="checkbox"/>						PL	- Default -		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

2. Effective customer search

The most recommended method of searching for your customers is to enter the Calendar and click the **“Find a customer or reservation”** option (located on the toolbar, bottom part of the screen (binoculars icon))

Having opened this option, you will see a **customer edition screen**.

Now simply **start typing your customer name** – when at least four characters are typed, KWHotel will propose you a customer.

Select a customer. His data will be loaded and on the right his reservation history will be presented.

You can even select such reservation and open it for further information.

Alternatively, you can use the **Customers module** to find a customer you wish to edit.

3. Customer creation screen

The customer creation screen consists of four tabs and a small toolbar on the bottom. Let`s start with the toolbar. It offers you the following options:

Clear (New) – erases data from all fields and lets you start from the scratch

Hotel ID card – allows you to print the customer ID card

Remove customer duplicate – deletes the current customer and replaces him with a customer of ID you will specify.

Pay attention:

Customer ID is displayed in the upper left corner of the customer screen.

Customer creation window consists of four following tabs:

a. Customer information – contains the most important data of your customer such as name, address or phone number.

Pay attention:

Apart from including the customer data here, you can also assign a Child / Regular / Blacklisted status and grant your customer a time-based discount.

How does the discount work?

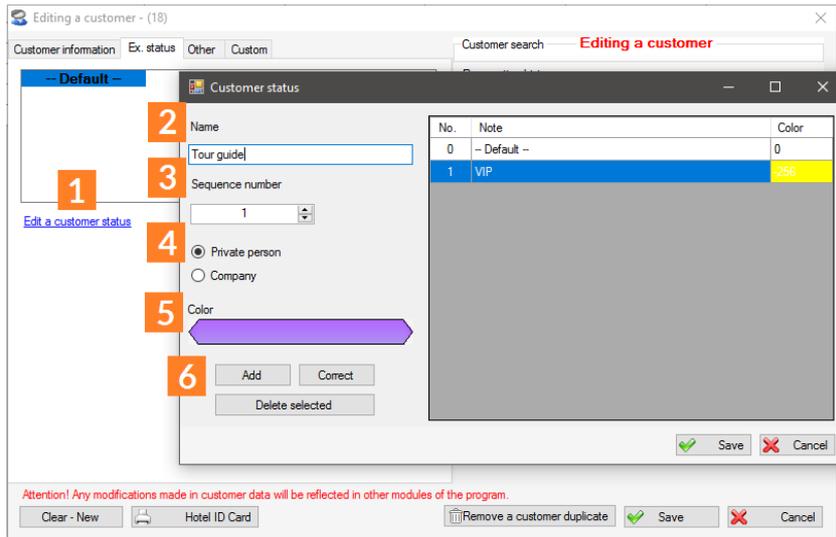
You need to insert a discount percentage and then select dates when the discount will be valid. Now, if you add your customer to the reservation and its` term will fall at least one day within the discount range, the discount will be applied into the discount tab.

b. Ex. status – if you find the three default statuses of Child / Regular / Blacklisted insufficient, new ones can be added here.

Step by step guide:

1. Click the “Edit a customer status” option
2. Insert a name of the new status (i.e. Tour guide)
3. Choose a sequence number (order on the statuses list)
4. Decide whether status concerns a private person or company
5. Pick a color of the status
6. Now click “Add” – the status will move to the list on the right

(see the steps on the screen shot below)



Pay attention:

If you wish to delete or modify an extra customer status, double click it on the list on the right, fill in new data and click “Correct” or click “Delete selected”.

c. **Other** – more options to gather data about your customer

Load a picture – allows you to upload a photo of your customer

Pay attention:

Before photo upload is possible, make sure to specify a path where images will be stored. This can be done in Tools → Configuration → Other → Page 2.

Customer added by – who added this user?

Date of creation – when was this user added?

The customer agreed to receive mailing – simple checkbox to make you certain that this customer wishes to receive any mailing.

Issued documents summary – check all documents that were issued for this particular customer over the specified course of time. Simply choose a term, document type and click “Show a report”. This report can be exported to .CSV.

d. **Custom** – possibility to introduce **your own customer related fields**, to store more information about your customer.

Step by step instruction of creating new customer statuses

1. Click “Add value”
2. Type name of the new value

Pay attention:

You can type a default answer KWHotel will propose for this custom field

3. Choose a type of the field

Pay attention:

There are five possible types of fields:

- a) String – a regular string of text and numbers*
- b) Number – numbers only*
- c) True/False - YES/NO choice, i.e. advance*
- d) Custom – you can create your own answers*
- e) Date – date such as 16.10.2016*

4. Save changes. This field will now be available in every reservation

Pay attention:

You can mark each field as an obligatory – receptionist will not be able to save the customer unless he fills the obligatory field.