M

M Customers / Members

Customers

Cloud, Corporate*

Members capture customers that have registered for an account, and have explicitly accepted the client site's terms and conditions. Membership implies a closer relationship between the client, and is used for ecommerce and Cart App transactions, and it is a prerequisite for participation in any loyalty program activities.

Member records are created and activated during self-registration by the member. In most cases, the member record is created during registration (the exception is [member import](), where registration will activate an imported member record). Importantly, member records are not created and activated by POS clerks.

Memberships are associated with customer and user records as follows:

- Customer records track more general activity.
- A member is always associated with a customer record, but customer records do not necessarily have a corresponding member account.
- User accounts are a security entity, and control how people can access POS services.
- A member always has a User account, but user accounts may not necessarily be for a member.

- Member ID is an unique identifier for the member. This value is generated by the system, and is read-only. Other data records and items in the system typically use this value to refer to the member.
- First Name is the required first name of the member.
- Last Name is the required last name of the member.
- Phone is the optional phone number of the member. The type of phone number can also be set.
- Alt Phone is an optional alternate phone number of the member. The type of phone number can

also be set.

- Birthdate is the optional birth date of the member.

When a member registers for an account, a corresponding [User](#) account is created. The member will use this User account to login to Fusion POS services like the Cart App and ecommerce pages.

The user name field is read-only; it cannot be changed. Usernames for members are based on the email address of the member.

> A warning message is displayed if this value does not point to a valid username, or if the user account is not enabled (or validated if email verification is required).

When a customer registers for a membership account, the member is matched to one or more customer records by email address. The matching process is as follows:

- If the member's email address matches a customer record, that customer record is linked to the new membership.
- If the member's email address does not match a customer record, a new customer record is created and linked to the new membership.
- If there are multiple matches, all customer records are matched to the new membership. The oldest customer account is considered the primary customer match.

The customer accounts field is read-only and cannot be changed after registration.

> Given the automatic matching of customer accounts to membership by the email address, it is highly recommended that email verification of new members is enabled. This option ensures that the new member can access – i.e. owns – the email address that they are specifying in the registration.
>
> See [Registration Settings](#) for more information.

The Contact tab contains multiple fields for managing the member's phone numbers, and one or more physical address fields.

In addition to the common address fields, each address has the following options:

- Default indicates whether the address should be the member's default address; i.e. it is the first address available in user interface selections.
- Shipping indicates the address can be used for shipping.
- Billing indicates the address can be used for billing.

Clerks can add and edit addresses.

The Membership tab contains additional information related to the member's membership details.

The Membership Level indicates the [membership level](#) of the customer. This can be manually changed, but is usually maintained automatically based on the usage patterns of the member.

The Images field captures images that the user has uploaded. This is displayed in the Cart App, primarily for the loyalty program.

Clerks generally do not manage a member's images.

Member records can contain additional information, depending on the other features that are enabled in POS.

The Gift Card fields display a [grid view](#) that displays gift cards that are owned by the member. These gift cards will have an electronic code indicating that the member owns the card.

See [Gift Cards](#) for more information.

The Purchases tab displays summary information and a [grid view](#) that displays purchases that were made by the member. Purchase information can be queried and reported at the line level.

See [Purchases](#) for more information.

The Loyalty Points tab displays summary information and a [grid view](#) that displays loyalty point transactions that were generated for the member (i.e. in response to purchases or redemption of points).

Summary information includes:

- Points balance
- Earnings totals
- Redemption totals

Depending on permissions, loyalty point operations include the ability to:

- [Redeem points](#) to an electronic gift card
- [Create adjustment](#) records

See [Loyalty Points](#) for more information.

The Envoy fields are only shown if the Envoys feature is enabled, providing additional information if the member is an envoy, or has been recruited by an envoy.

See [Envoys](#) for more information.

A POS Customer record will be created for a new member registration if no customer account matches the member's email address.

Any new customer that is created is populated with values from the new Member. Additional fields that are specific to the POS are populated from the register that is assigned to Fusion POS server.

> To aid integration with the POS database, the POS server identifies itself as a unique register. The register setting is configured through [POS Settings](#).
>
> This register must be configured similar to real Windows registers, which includes default values for new customer records.

The customer information that is populated through the register setting includes:

![fusion logo]

- Customer Class
- Customer Price Group
- Marketing (versus Accounting) Customer flag
- Location
- Tax Key
- Terms Code

- [Envoys](#)
- [Membership Levels](#)