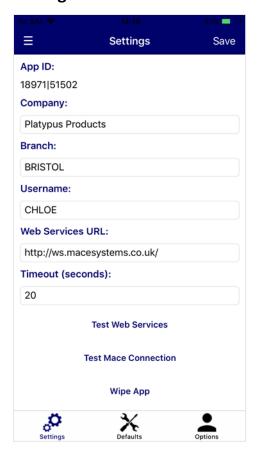# Customer Enquiry Documentation

Settings

On first set-up, you will be asked for the following details:

Username – User ID for the device

Web Services URL – The webservices URL required to connect to MACE

Timeout (seconds) – The delay that will occur before an error is displayed while trying to connect to MACE

Press **Save** and then complete the additional settings:

App ID – This will be generated automatically

Company – The company to connect to in MACE

Branch – The branch to connect to in MACE

Additional options include:

Test Web Services – Test the device connection to web services

Test Mace Connection – Test the device connection to MACE

Wipe App – Clear device data and restore to default settings

Defaults

The Defaults page can be used to change application colours.

Theme Colour – Main colour for the application

Theme Text Colour – Used for text headings and titles

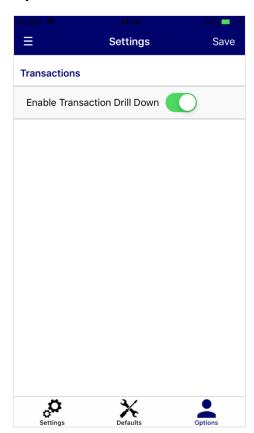**Page Text Colour** – Application Background colour

Page Detail Colour – Used for page text

Reset Defaults – Set colours to the default application colour scheme

There are multiple colour options, with the ability to enter colour names such as 'red', or type in a colour's hexadecimal code. Colours on this screen will be saved automatically.

Alternatively, clicking the box next to the textbox will open a detailed colour selection screen. Click **Save** on this screen to save your colour selection.
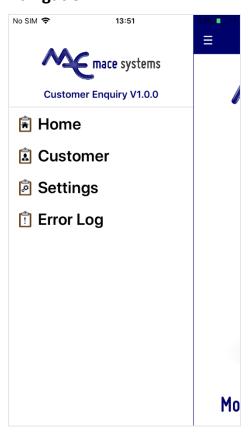
Options

The Options page is used to enable additional features

Enable Transaction Drill Down – Toggle the ability to open a page listing the transactions for the selected period.

Save – Saves any changes made to the Options

Navigation

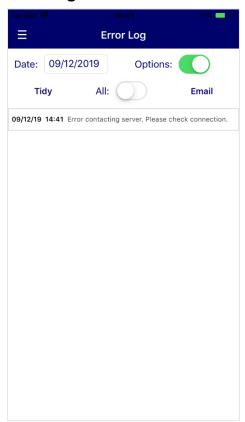To navigate, either slide the screen to the right, or press the three dashed lines.

To select a page, tap on the required menu option.

To open the customer enquiry page, tap the **Customer** option.

To change settings, select the **Settings** option.

To view past error messages, tap **Error Log**.

Error Log

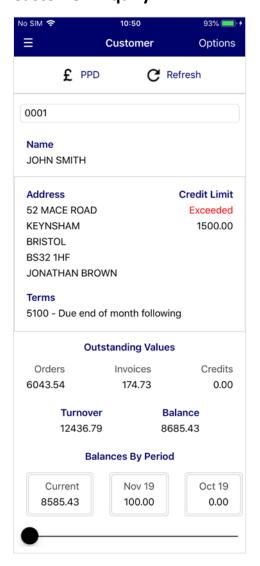**Date** – List error messages on a set date

Options – Display options bar

Tidy – Clear error messages older than 60 days old

All – View all messages regardless of set date

Email – Email error log to MACE Support

Customer Enquiry

The Customer page displays essential information about the customer account.

Customer ID – A textbox where the customer ID is entered

Name - Name of the customer

Address – The address lines and postcode

The contact name is also listed under the address fields if applicable.

Credit Limit – The credit limit of the customer. If the credit limit has been exceeded, there will be a warning message displayed

Terms – The terms code and description. If the terms have been exceeded, a warning message will be displayed

Outstanding Values – The outstanding values of the customer orders, invoices and credit notes is displayed

Turnover – Account turnover balance

Balance - Total outstanding account balance

The outstanding balance is broken down by period date under the **Balances By Period** heading. Clicking a period heading or value will display a page listing live transactions within this period. Scroll right to display more transaction periods. The scroll bar at the bottom of the screen can also be used to move across the periods list, as well as display the current horizontal position in the list.

Options – Show additional features. These include:

PPD – Display the **Prompt Payment Discount** page

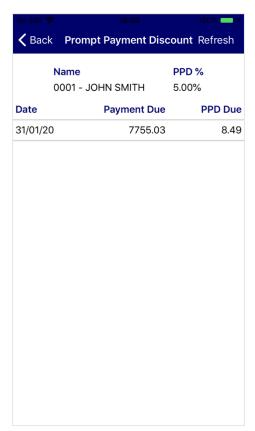**Refresh** – Refresh customer information

Transactions

The Transactions page displays a list of live transactions within the selected period.

Scroll to the right to view more information about the listed transactions, including references and transaction values. The scroll bar at the bottom of the screen can also be used to move across the transactions list, as well as display the current horizontal position in the list.

Hide Paid Transactions – Toggle whether to display transactions that have been paid

Refresh – Refresh the list of customer transactions

Prompt Payment Discount

The Prompt Payment Discount page lists PPD totals due to the account.

Refresh – Refresh the account totals

Name – Customer name

PPD % - Account discount percentage

Date – Period end date

Payment Due – The total payment due for this period

PPD Due – Total PPD outstanding to the account