**TECH AFRICA – STOCKS DATABASE**

**CUSTOMER INFORMATION MODULE – DESIGN BRIEF**

**Work-flow (General)**

* Procedure for dealer reviews
* Update of customer details

**Functions / Working Parameters**

* Procedure for dealer reviews
  + A report that is run monthly showing sales of dealers over the past 4 months that are below 5k in USD terms
  + A report that is run monthly showing sales of mid-dealers over the past 4 months that are below 10k in USD terms
  + A report that is run monthly showing sales of super-dealers over the past 4 months that are below 20k in USD terms
* Update of customer details
  + If a customer price structure is changed to a better pricing system by anyone other than MD, then a digest mail be sent to MD of the change

**PROBLEM AREAS**

* None yet here

TO DO LIST

|  |  |  |  |
| --- | --- | --- | --- |
| Type | Details |  |  |
| Report | For the dealer status review – will be one report with 3 sub-reports |  |  |
| Email code | Triggers from the customer update form when price structure changed for a customer |  |  |
| Form Update | A customer information form showing (think a tabbed control):   * Need to check with Daniel what he would like * Contact details * Sales info * Sales Summary * Job Cards * Maybe top 10 items purchased with qty and USD sales value |  |  |
| Form | To add new customers – this must have validations to control entry |  |  |
| Query | For the details needed on the customer update and view form |  |  |

**PLAN ON HOW IT LINKS TOGETHER**

Customer code (as per Pastel)

Branch

Branch Address

Contacts

Roles

Contact Details

Address

* Link for job cards, warranties and serial numbers will be from the contact details off of the main account
  + Maybe this is an optional so in scripting – if value is zero then look at the master account details
* Address on branch is not possible on a cash sales account
  + So cash sales accounts would be split to be an account per the town/city
  + With addresses if branch address is null then look for an address linked to the customers details link
* With addresses, maybe have a join table with the address ID, the branch or customer contact details ID, an option of if it is a branch or contact being linked – This may sold the problem
* Mailing lists for customer price lists will be picked up from the contact details table for the ID for email addresses
* Job Card, warranties and serial numbers can also have an optional branch with join table