Customer types are configured in the back office which can be accessed via http://gui.tammsonline.com:8300/index.cfm?screenId=130 with the login credentials previously received.

Once logged into the back office

1. Click the pricing rules tab at the top of the screen.
2. Then click the Class list option and a window will appear. At the top of that window click the add button. In the new window type the name of the for the Customer type.
3. Once entered click the save button at the top of the open window.
4. Repeat this as needed to add all necessary customer types.
5. Once all customer types have been added click the X next to the Add button to close the window.
6. Click the pricing rules tab and then click Price Lists
7. At the top of the new window that has appeared click the ADD button
8. Select the appropriate class from the drop down menu (the names setup under the class list appear here)
9. Configure the rest of the options in the window as needed per Class (CATEGORY MUST BE UPPERCASE)
10. Once all needed fields are filled out click the save button at the top of the window.
11. Add new pricing rules as needed for each Class previously setup.

Customer Types are set per customer in TAMMS

1. Log into TAMMS
2. Go to the customer screen 1. Sales → 2. Customer Accounts
3. Enter the Customer Id (if assigning a membership card scan the back of the membership card into this field)
4. Hit enter on "Yes, add customer"
5. Fill in the customer information
6. When at the "Type" hit spacebar to show the drop down menu.
7. Select the appropriate customer type from the previous setup "Classes" in the backoffice
8. Finish filling in customer information and save the record
9. The customer Type is now set and the discounts setup in the backoffice will now be applied to that customer.

Adding a customer to a sale

1. Navigate to 1. Sales → 1. Sales Screens → new sale
2. Press F8 (customer)
3. Type in the customer Id (scan back of membership card if applicable)

4. Now the customer’s account information should be on the screen
5. Verify the correct customer record has appeared
6. Press F2 to select the customer record for the sale.
7. Continue the sale as normal all applicable discounts based on the customer type will be automatically applied to the sale