Setting Up and Maintaining Customers

Customer data plays an important role in the success of any business. It allows retailers to make informed decisions when planning promotions, introducing loyalty programs, or special ordering products.

In this course, we show how to set up and maintain customers.

Objectives

- Adding a Customer
- Maintaining Customers

Adding a Customer

To add a new record, select **Customers** and then tap **Customers** in the sub-menu.

If your default view is **Form view**, select the **Table view** icon. This view gives you several filters and export functionality.

Now, tap the **Add** button. If you are in *form* view, select this **Add** button.

In either case, the **Add New Customer** page displays.

You can categorize your customers into two types: Personal and Business.
Personal customers are generally those who purchase your products and services for their own use.
Business customers may purchase your products to service their own clients.

Select a type of customer from the drop-down menu.

Enter the required information under **Contact Information**. Fields denoted with a red asterisk are mandatory.
Enter the customer's *first* and *last name*.
Enter the *account number* or leave it blank to generate an auto-assigned number.
Enter the address information in *these* fields.
Use the *toggles* to set the address as the ***Main, Billing*, or *Shipping Address.***
If you are using Propello accounts receivable, switch the toggle **Charge Allowed** *on* if this customer is allowed to buy items on credit.
Choose a credit terms code to determine the due date and discount if any.
Enter other information such as email, job title, tags, customer groups, and DOB in the respective fields.
Here, enter the phone details and use the **Primary** toggle to set this number as the primary contact number.

Finally, tap **Save**.

You can also select **Save & Add More** to save this customer and add another.

When adding a **Business** account, enter the customer's account information alongside the contact information.

Fill in the account name and account number.

Add customer groups and tag, if any, and tap **SAVE**.

Maintaining Customers

Customer maintenance allows you to edit and update incomplete or incorrect account information.

From the *main menu*, select **Customers** > **Customers**.

Use the search field to search for a specific customer or select **Table View** to view all customers.
Use the available filters to search for a customer or tap **Search** to list all customers.
Check the box next to a customer or check *this* box to select all customers.
Tap **Edit**.

The **Edit Customer** screen displays.
You can scroll through customers using the *forward and backward* buttons if you've selected more than one customer to edit.
Select the tabs you want to update, make the necessary changes, and then select **Save**.

The **GENERAL** tab has various sections.

Account Information displays the customer's details*.* Tap the fields to edit information.
You can also activate or deactivate a customer account using the **Active** toggle.
The blue links allow you to edit specific information.
Select any link. It opens the form related to the link.
For example, the **Ship To Address** displays the number of shipping addresses available for the customer. Tap the link to edit the shipping address details.
Add, edit, or delete an address by clicking the respective icons.
Once the edits are done, tap **Close**.
To add an image for this customer account, tap **Actions > Manage Images.**
Here, you can add, remove, and set any image as the primary one.
The customer's status concerning consumer privacy is updated by selecting the value from the drop-down.
The value selected here is based on whether the customer has agreed or disagreed with the consumer privacy terms and conditions at POS.

Pricing Information displays pricing sequence, price group, and price type information.
These fields are used to determine if this account receives any type of category discount or specific price level.
More information about these settings can be found in the pricing agenda and courses.
If you are using Propello accounts receivable, the **Charge Allowed** toggle determines if the customer is allowed to buy items on credit.
Switch on the **Credit Hold** toggle to place the customer on credit hold which indicates that they cannot charge on the account.

The **Tax Information** section allows the assignment of a specific *tax code* for the customer.
If you want to or identify them as *tax-exempt* accounts, you will need to select an exemption reason.
Dependent on your local tax laws, you may need to provide the exemption number and expiration date.

If this account requires a PO number to be included with a point of sale transaction, you can set the toggle to required.

In the **POS Information** section, use the ***Receipt/Invoice*** toggle to determine the default selection of receipt or invoice printing for this customer at the point of sale.

You can also add, edit and delete additional notes.

While you can add, edit or delete contact details using the **GENERAL** tab, you can also do the same *more conveniently* using the CONTACTS tab.
Select a contact and tap **Edit.**
If you are using Propello accounts receivable, the **Auth to Charge** toggle determine if the contacts are authorized to charge transactions.
Select **OK** when edits are done.
Select a contact and tap **Delete** to delete a contact.

The **History** tab displays the past sales transactions.
You can select **This Week, This Month, This Year** to view specific details in the grid, alongside the totals and statistics.
Tap **Export** to export any information to Excel.

The **Loyalty** tab displays the loyalty enrollment information of a customer.
You can add a loyalty program for this customer by selecting **Add.**
Tap **Edit** to change the status of an enrolled program.
You can view the reward redemption transactions in *this* tab.
You can also edit and view the billing details in the **Membership Billing** section.
More information about Loyalty programs is available in other related agendas and courses.

Finally, for accounts receivable users, the **Credit Info** tab displays the maximum amount the customer is allowed to charge on the account.
You can view or change the credit terms code from the **Terms Information** section.

Don’t forget to click **Save** at the end.

You can delete customers that are no longer required.
However, you cannot delete a customer that has an open order, Accounts Receivable transactions, or *any* pending POS transactions.

Check the box to select a customer or check *this* box to select all customers.
Tap **Actions** > **Delete Customers**.
Select **Yes** in the confirmation prompt to delete the customer.

To export customer records, select a customer and tap **Export to Excel**.

Recap

Customer records are a powerful tool to track and manage activity. For more information, refer to the help articles, videos, and guided learning.
In this course, we showed you how to add a new customer account. We also showed you how to view, update, and delete an account.

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