Portal
Release Update v4.30.32– October 21, 2024

New + Improved

New Shelf Tag Option

For those that have wooden gondolas, this new shelf tag option may literally be the perfect fit for you. The shelf tag is designed to be a little narrower in height, so it can fit on wooden shelf edges. It prints up to 44 tags per page.
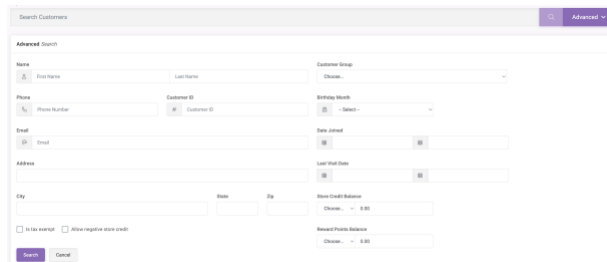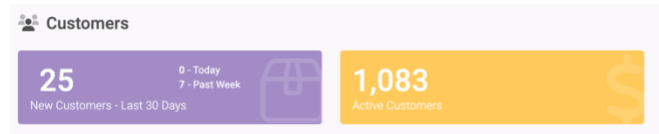

Customers Page - Retouched

We've decided to give the customers page a proper facelift. You'll be able to search more easily and have more visibility into your customers. Below are some of the key changes made to this page:

Easier and more ways to search

- Keyword Search: just enter what you want to find into the keyword search field, and it will search through the following customer fields to see if there is a match (or partial match):
  - Customer ID
  - First/Last Name (able to find full name)
  - Any Phone Number
  - Email
  - Billing/Shipping Info (Address, City, Etc.)
  - Customer Group
- Advanced Search:
  - Selecting the advanced search option expands a section to allow you to search any combination of things to more easily get the desired customer results you're looking for.
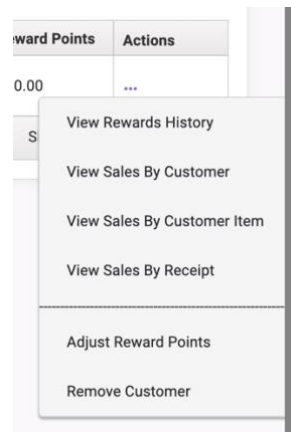 - Below is a view of what can be searched in this section:

- Filter Results by Customer Widgets:
    - New Customers widget: selecting this will automatically filter to display only the customers that have been added in the last 30-days. A Joined column will automatically display with the date the customer was added

    - Active Customers widget: selecting this will display all your active customer

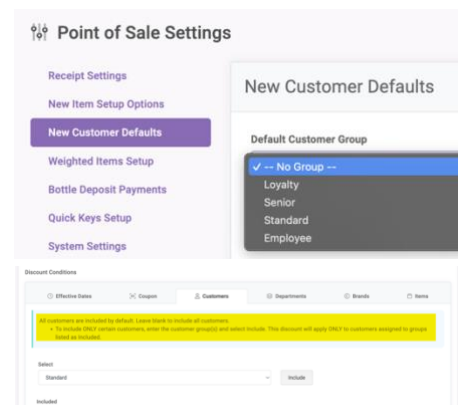More visibility into each customer

- Can see more information about each customer when searched results display, such as:

    - 6 Mon Sales: how much the customer purchased in the last 6 months
    - 6 Mon Visits: how many times the customer visited store to make purchases (# sales transactions)
    - Store Credit: the customer's current store credit balance
    - Reward Points: the customer's current reward point balance
- Actions: this provides a list of option to navigate quickly to view more information about the customer or to make a change to the customer. Selecting one of the reports will open a new tab.

    - View Rewards History
    - View Sales By Customer
    - View Sales By Customer Item
    - View Sales By Receipt
    - Adjust Reward Points
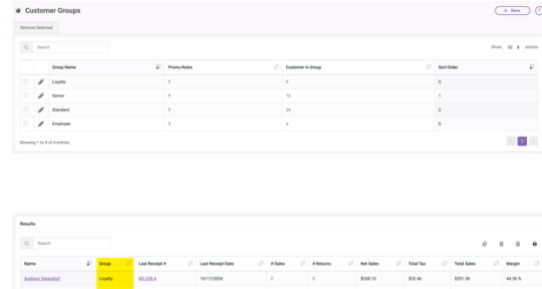   - Remove Customer

Customer Group Changes

We're happy to announce that we've added more capabilities into using customer groups and have provided more visibility regarding them as well. Below are some key changes that were made:

- Increased Capabilities:
    - Can now create a sort order for customer groups. This sort order will define the order the customer groups will display on all OrderDog applications.
    - Can now define the default customer group that gets applied when creating a new customer on any OrderDog application. Can even choose no customer group as an option. This is done on the Point of Sale Settings Page.

    - Discount Rules & Customers no longer require a customer group to be associated. This is important, because discount rules that do not have a customer group associated will be applied to all transactions, regardless of whether a customer is added to the transaction or not. If a customer is added to the transaction, the

rule with the greatest discount will be applied. The flexibility of being able to create rules that can be applied to transactions without a customer associated should significantly improve your ability to offer promotions to anyone that visits your store.

- More Visibility:
  - The customer groups page now shows:
    - How many discount rules associated
    - How many customers are associated, along with a clickthrough link to easily see all the customers
  - Some reports now display a customer group column
    - Sales By Customer Report
    - Sales By Customer By Item Report
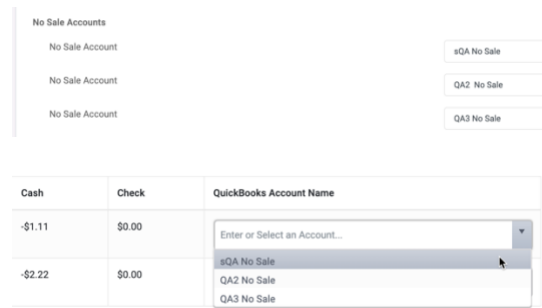   - Customer Balance Summary Report

Customer ID Change

A customized customer id is no longer required. It can still be used, but it is not necessary. Since our system already applies an internal unique number, there isn't a need to require you to apply one as well.

QuickBooks Export Report

We're happy to hear this new report from our last release has made it easier to import batches into QuickBooks. To make the process even quicker:

- Can predefine up to 3 QuickBooks Account Names in you Store Settings Page for No Sale transactions. These predefined names will display within a dropdown option for each no sale transaction.
- Added ability to combine cash/check deposits together

Sales by Item Report – Brand

We recognized that there is an important need to search for by a specific brand to see all the items that have been sold from it, so we've added a new "Brand" filter. Select the "More Options" section on this report to use the new Brand filter. To accompany this, we've added a Brand column to make items sold within various brands more visible.