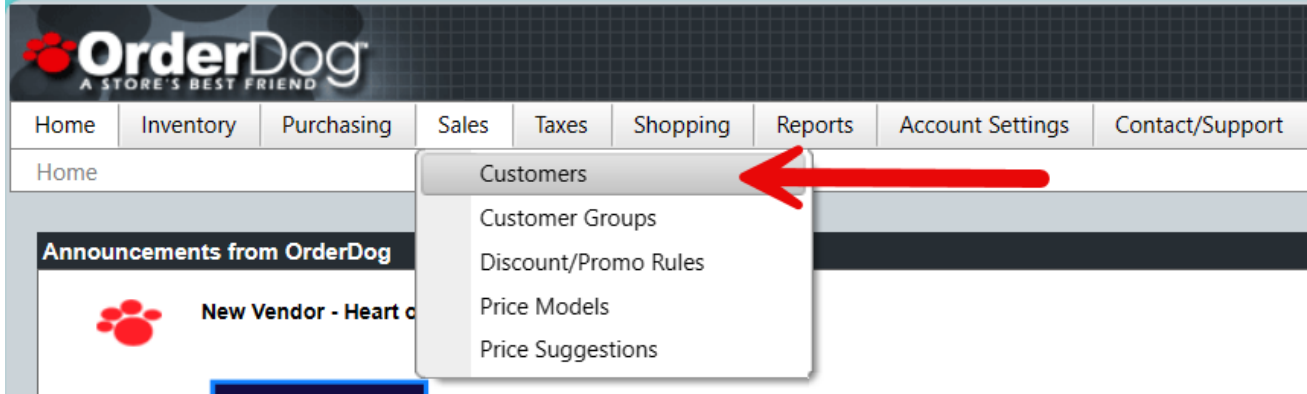




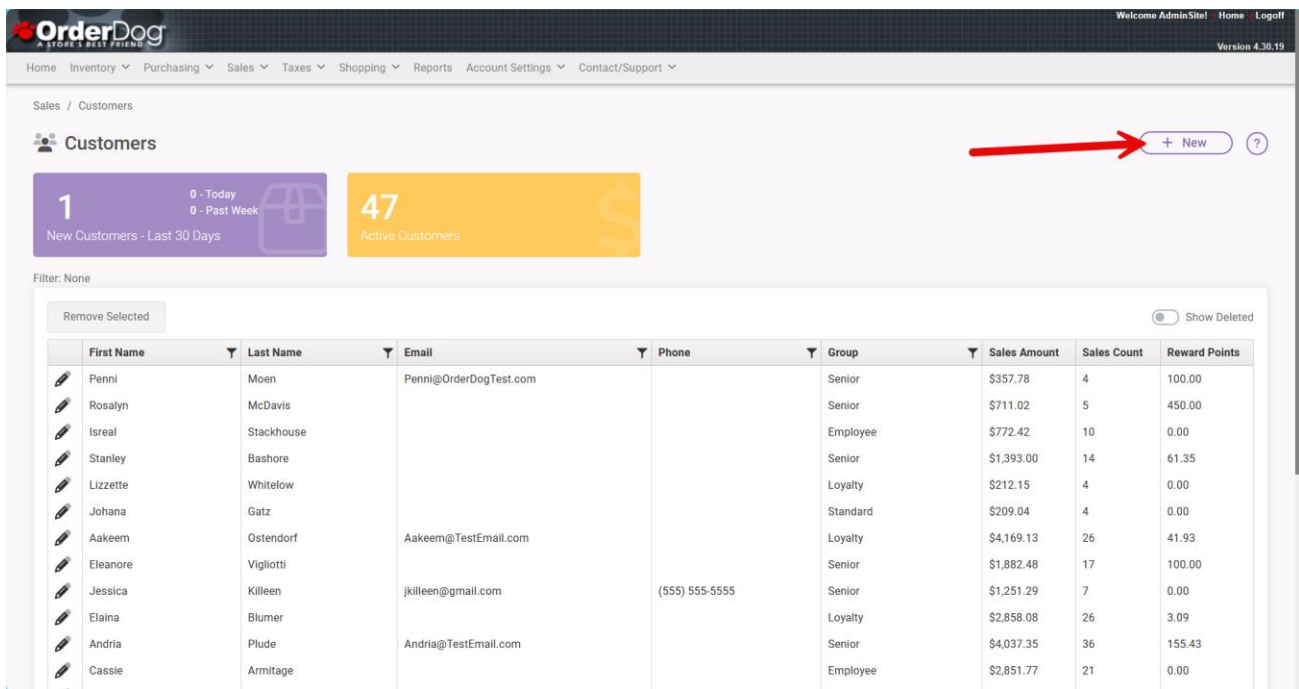
## **Applying a Customer Group (Portal)**

User Guide > Customer Records

1. Starting on the OrderDog portal, navigate under “Sales” and select “Customers”.



2. This is the “Customers” page. Here, you can either add a new customer or edit an existing customer record. First, we’ll try adding a customer by pressing the “New” button.



3. Fill in any desired information or notes about the customer on this screen. For the best customer record tracking experience, we recommend/require filling out the following:
  - a. First Name
  - b. Last Name
  - c. Email – Useful for emailing their receipts or other store uses.
  - d. Phone Number – This will allow customers to input their phone number on the customer facing display on their next visit.

- e. Customer Group – Select the customer group they fall under, i.e. Standard, Employee, Loyalty, Senior, etc. This will apply the discounts associated with this customer group automatically to transactions with this selected customer. The default customer group is Standard. Select Standard if the customer does not fall into a special group.

OrderDog  
A STORE'S BEST FRIEND

Home Inventory Purchasing Sales Taxes Shopping Reports Account Settings Contact/Support

Sales / Customers / Customer - Edit

Customer - Edit

Customer Information General Address Other

Status  
Active

First name **a.** Last name **b.**  
Jane Doe

Email address **c.**  
example@email.com

Mobile **d.**  
(098) 765-4321

Phone  
Phone

Customer Group **e.**  
Standard

Allow negative store credit  
 Is tax exempt

Notes  
Note

Save Changes Cancel

- 4. Once you are finished filling out the customer record, press "Save Changes".

Allow negative store credit  
 Is tax exempt

Notes  
Note

Save Changes Cancel

- If you want to edit an existing customer record to reflect a different customer group, then first locate the customer record by using one of the filters on the “Customers” page. Press “Filter” to see the results.

The screenshot shows the OrderDog Customers page. At the top, there are navigation menus for Home, Inventory, Purchasing, Sales, Taxes, Shopping, Reports, Account Settings, and Contact/Support. Below the navigation, there are two summary cards: one for '1 New Customers - Last 30 Days' and another for '47 Active Customers'. A search filter is applied to the 'Last Name' column with the value 'Jane'. A dropdown menu is open, showing 'Contains' as the search type and 'Jane' as the search value. The 'Filter' button is highlighted with a red arrow. The table below shows a list of customers with columns for First Name, Last Name, Email, Phone, Group, Sales Amount, Sales Count, and Reward Points. The 'Group' column is highlighted with a red box.

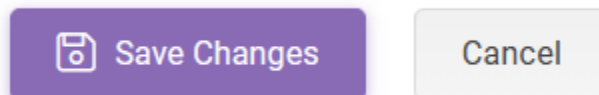
First Name	Last Name	Email	Phone	Group	Sales Amount	Sales Count	Reward Points
Penni		Penni@OrderDogTest.com		Senior	\$357.78	4	100.00
Rosalyn				Senior	\$711.02	5	450.00
Isreal				Employee	\$772.42	10	0.00
Stanley				Senior	\$1,393.00	14	61.35
Lizzette				Loyalty	\$212.15	4	0.00
Johana				Standard	\$209.04	4	0.00
Aakeem		Aakeem@TestEmail.com		Loyalty	\$4,169.13	26	41.93
Eleanore				Senior	\$1,882.48	17	100.00
Jessica		Jkilleen@gmail.com	(555) 555-5555	Senior	\$1,251.29	7	0.00
Elaina				Loyalty	\$2,858.08	26	3.09
Andria		Andria@TestEmail.com		Senior	\$4,037.35	36	155.43
Cassie				Employee	\$2,851.77	21	0.00

- Once you have located the customer record you wish to edit, press the pencil icon next to their first name.

The screenshot shows a close-up of the customer list. The 'Jane Doe' record is highlighted. A red arrow points to the pencil icon next to the first name 'Jane'. The table below shows the details for the selected record.

First Name	Last Name	Email	Phone	Group	Sales Amount	Sales Count	Reward Points
Jane	Appleseed			Loyalty	\$22.57	1	1.04
Jane	Doe		0987654321	Standard	\$204.86	13	100.00

- Change the customer group as you see fit, and any other details you might want to, and then press “Save Changes”.



**YOU'RE DONE!**

If you have any questions or concerns regarding this tutorial, or any other inquiries, please feel free to contact us at:

Email: [support@orderdog.com](mailto:support@orderdog.com)

Call: 1-866-673-3736

Our hours: 8 AM – 6 PM CST

Monday – Friday

After Hours Support Available

Visit our website for more tutorials and resources:

<https://orderdog-inc.kayako.com/>

