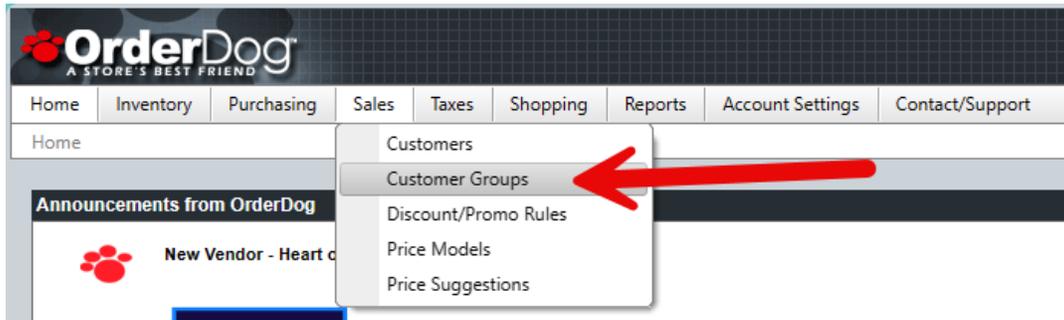




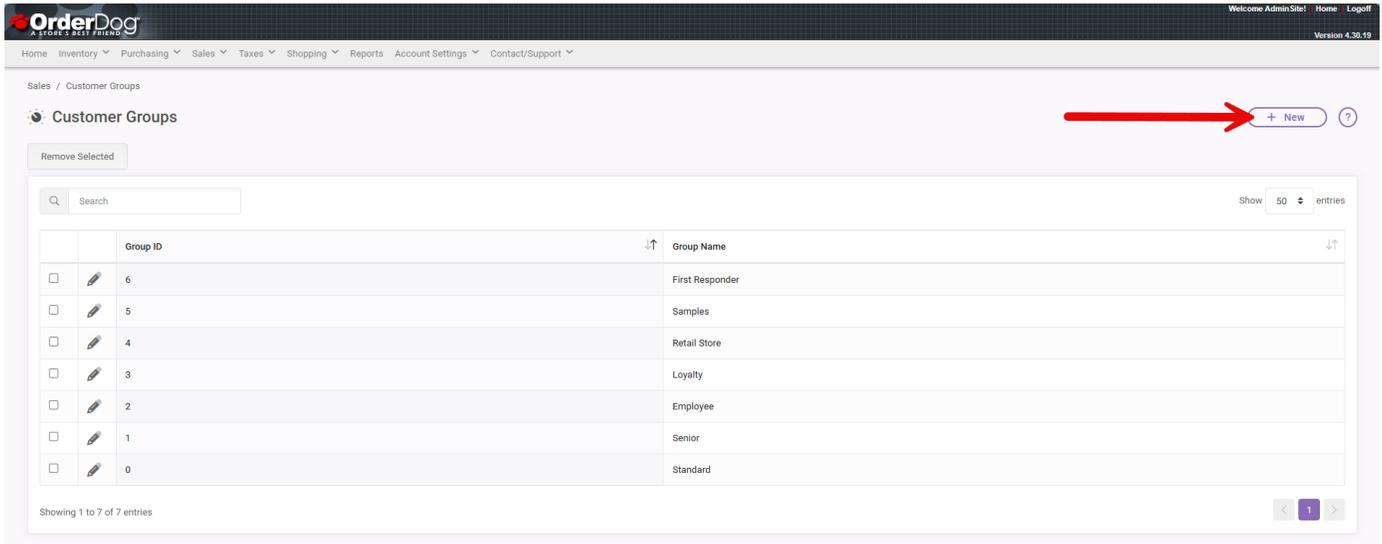
Creating a Customer Group

User Guide > Customer Records

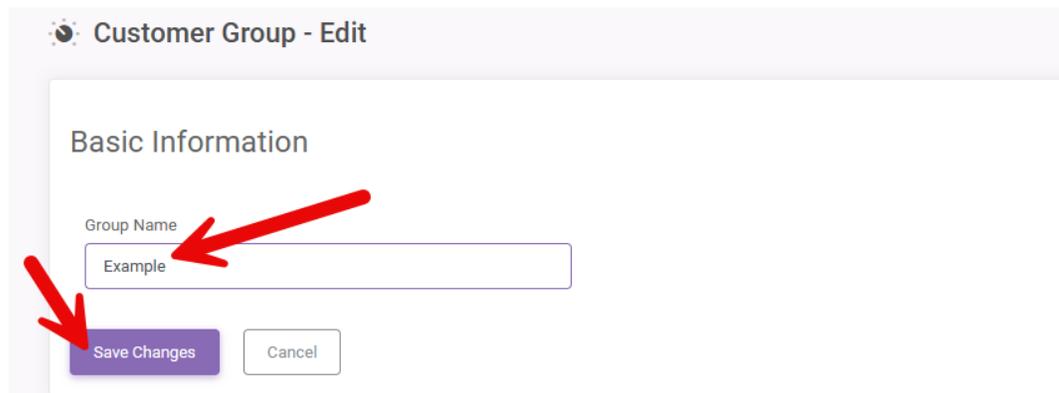
1. Starting on the OrderDog portal, navigate under “Sales” and select “Customer Groups”.



2. This is the “Customer Groups” page. Here, you can see all of the previously created groups you have created. You can use the search box to locate a specific group if needed. To create a new group, press the “New” button in the upper right corner of the page.



3. Enter the name which you would like to call the customer group. Press “Save Changes” when you’re done.



4. If you need to edit an existing customer group, you can press the pencil icon to change the name.



5. If you need to remove a customer group, you can check the box next to the desired customer group and press the "Remove Selected" button.



NOTE: If the customer group is tied to any existing customer records, or active/inactive discount rules, then you will not be able to delete the customer group. You will have to edit the customer record to be under a different group, and remove any conditions that involve this customer group on any and all discount rules before you can remove it.

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

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/>

