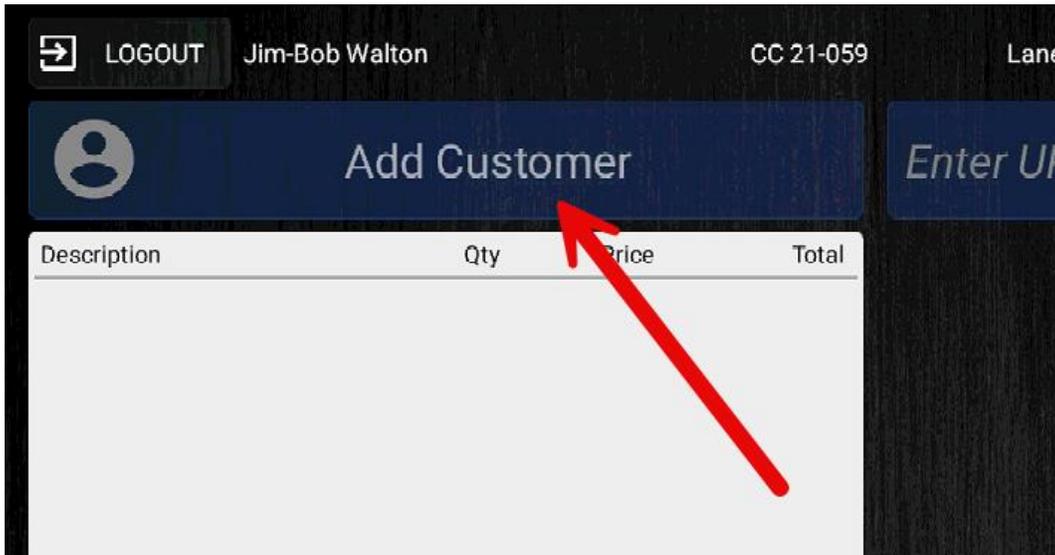




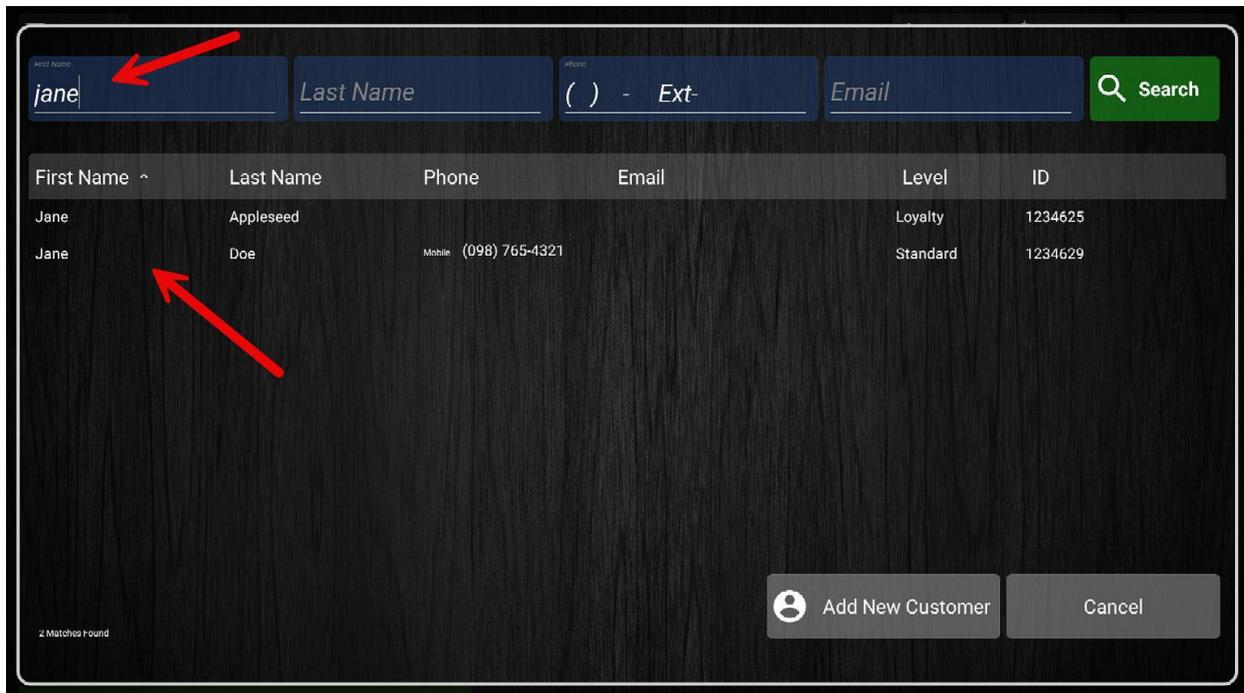
Viewing Customer History (Point of Sale)

User Guide > Customer Records

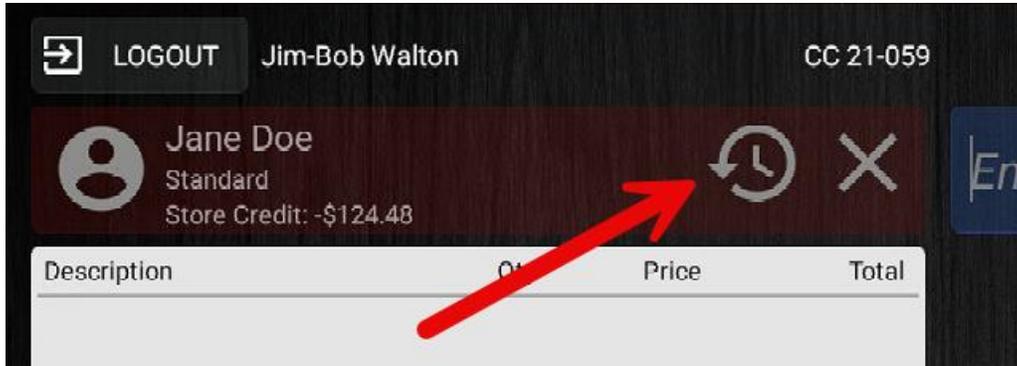
1. Starting on the main sales screen, enter the customer using the “Add Customer” button in the top-left.



2. Find the customer using the blue search boxes at the top. Tap on the customer's name once you have located them.



- Notice that the customer will now be displayed in the top-left corner. Tap on the history icon (the clock with an arrow around it) to continue to the customer history screen.
NOTE: The customer history screen requires an internet connection to display the history.



- On the customer history screen, you will see a list of all the customer's transactions.

Jane Doe		Total Customer Sales		Last 30 Days:		\$88.15	
Standard		\$169.81		Last 60 Days:		\$169.81	
Customer Owes \$124.48				Last 90 Days:		\$169.81	
Customer Since 01/15/2024							
Search Customer Sales History							
Date	Item ID	Brand	Item Description	Qty	Price	Total	Type
03/13/2024 01:29 PM	807735021672	Premier Research...	Aloe Premier	1	\$13.91	\$13.91	Purchase
03/13/2024 01:29 PM	858126006570	Complete Natural...	Turmeric Root	1	\$10.99	\$10.99	Purchase
03/13/2024 01:29 PM	810076210308	Lifelines	Everyday Diffuser Set 2 ...	1	\$12.99	\$12.99	Purchase
03/13/2024 01:29 PM	851231000754	Rieme	Blood Orange Sparkling B...	1	\$1.59	\$1.59	Purchase
03/13/2024 01:29 PM	811523031187	Battle Bars	Blueberry Protein Bar	1	\$3.49	\$3.49	Purchase
03/13/2024 01:29 PM	Store Credit		Store Credit		-\$0.80	-\$0.80	Payment
03/13/2024 01:29 PM	Gift Card		Gift Card	1	-\$45.72	-\$45.72	Payment
03/08/2024 09:34 AM	076280047820	Solaray	Spectro Multi - Vita - Min	1	\$46.99	\$46.99	Purchase
03/08/2024 09:32 AM	020065200047	Natures Way	Cream Calendula	1	\$14.99	\$14.99	Purchase
03/04/2024 10:47 AM	850019656411		GRILLED CHEESE SOURDOUGH...	1	\$6.19	\$6.19	Purchase
03/04/2024 10:47 AM	Store Credit		Store Credit		-\$6.70	-\$6.70	Payment
03/04/2024 10:39 AM	Store Credit		Store Credit		\$2.50	\$2.50	Purchase
03/04/2024 10:39 AM	Gift Card		Gift Card	1	-\$2.50	-\$2.50	Payment
02/27/2024 03:04 PM	Store Credit		Store Credit		\$5.00	\$5.00	Purchase
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Close

- You can search for a brand, item, description, or item ID using the search box to narrow down the results. You can also search “Store Credit” to see any transactions where store credit was bought or sold.

Jane Doe
Standard
Customer Owes \$124.48
Customer Since 01/15/2024

Total Customer Sales
\$169.81

Last 30 Days: \$88.15
Last 60 Days: \$169.81
Last 90 Days: \$169.81

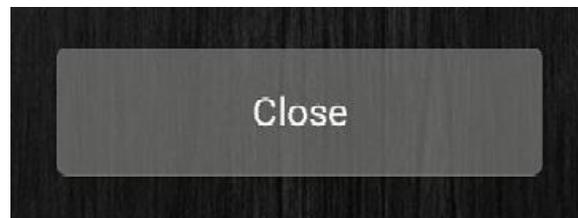
Search Customer Sales History

store credit

Date	Item ID	Brand	Item Description	Qty	Price	Total	Type
03/13/2024 01:29 PM	Store Credit		Store Credit		-\$0.80	-\$0.80	Payment
03/04/2024 10:47 AM	Store Credit		Store Credit		-\$6.70	-\$6.70	Payment
03/04/2024 10:39 AM	Store Credit		Store Credit		\$2.50	\$2.50	Purchase
02/27/2024 03:04 PM	Store Credit		Store Credit		\$5.00	\$5.00	Purchase
02/27/2024 12:28 PM	Store Credit		Store Credit		\$5.00	-\$5.00	Return
02/27/2024 12:02 PM	Store Credit		Store Credit		\$5.00	\$5.00	Purchase
02/27/2024 12:01 PM	Store Credit		Store Credit		\$1.50	-\$1.50	Return
02/27/2024 12:00 PM	Store Credit		Store Credit		\$1.00	-\$1.00	Return
02/27/2024 11:50 AM	Store Credit		Store Credit		\$2.50	-\$2.50	Return
02/27/2024 11:49 AM	Store Credit		Store Credit		\$5.00	\$5.00	Purchase

Close

- When you’re done reviewing the customer history, tap the “Close” button at the bottom to return to the main sales screen.



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/>

