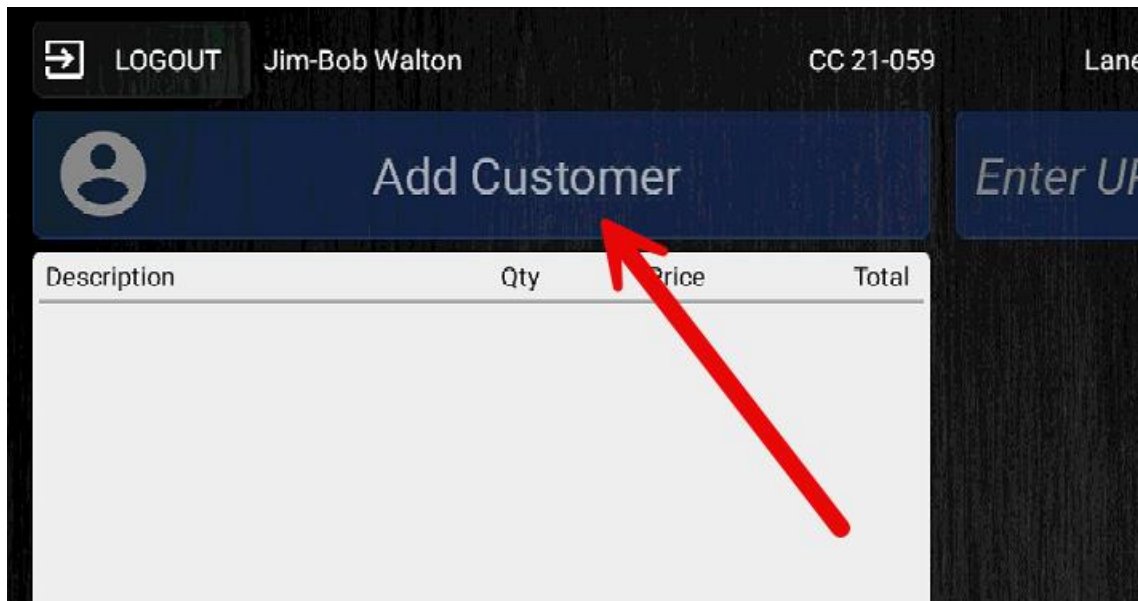




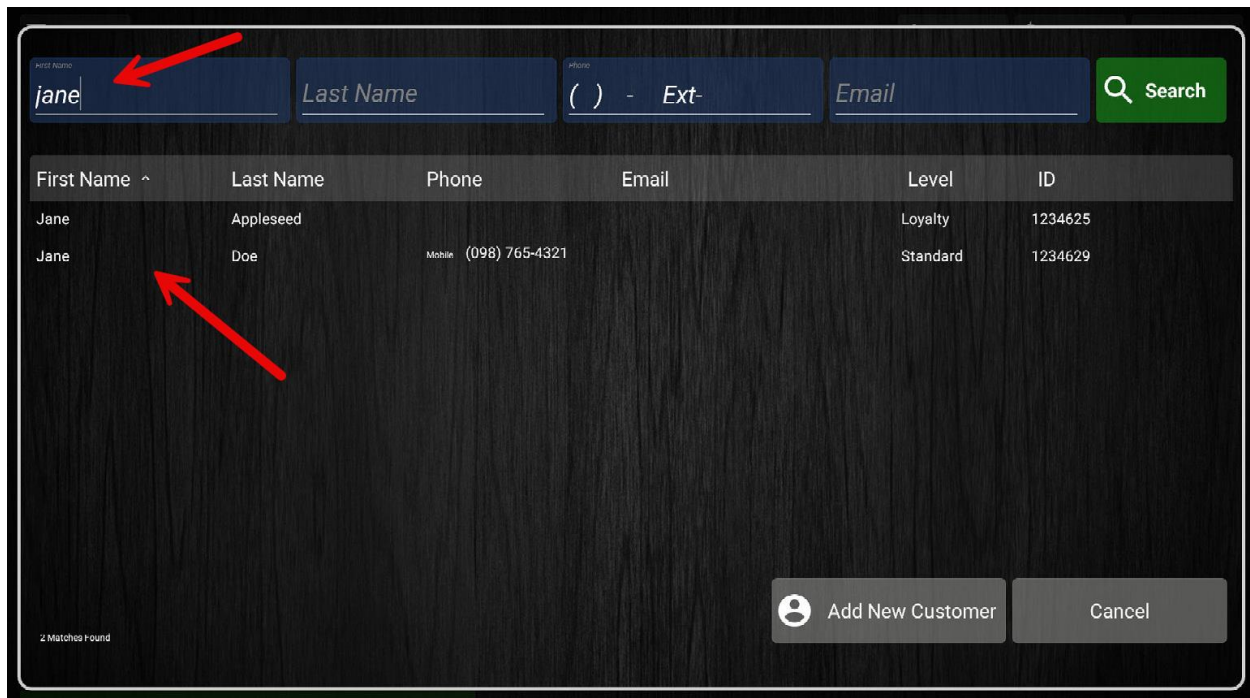
Editing A Customer Record (Point of Sale)

User Guide > Customer Records

1. Starting on the main sales screen, tap on the “Add Customer” button.



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



3. Tap on their name where the “Add Customer” button was previously. This will open the customer record edit screen.



4. Edit any customer information on this screen as needed.

The screenshot shows the customer record edit screen for Jane Doe. The form is divided into several sections. At the top, there are input fields for 'First Name (Required)' with 'Jane' and 'Last Name (Required)' with 'Doe'. To the right of these fields, it shows '100.00 Reward Points'. Below the name fields is the 'Email Address' field with 'example@email.com' and a 'Date Of Birth' field with '//' and a calendar icon. To the right of the email field, it shows '\$0.00 Store Credit'. Below the email field are 'Mobile Phone #' and 'Phone #' fields. The 'Mobile Phone #' field contains '(098) 765-4321 Ext-' and the 'Phone #' field contains '() - Ext-'. Below these fields are two tabs: 'Misc' (selected) and 'Address'. Under the 'Misc' tab, there is a dropdown menu showing 'Standard'. Below the dropdown is a 'Notes' text area. To the right of the notes area are two checkboxes: 'Tax Exempt' and 'Allow Negative Store Credit' (checked). At the bottom left, there is an 'ID: 1234629' label. At the bottom of the screen are two buttons: a green 'Save' button and a grey 'Cancel' button.

5. Once all changes have been made, tap "Save" to save changes.

The screenshot shows a mobile application interface with a dark background. At the top left, there is a blue rectangular field labeled "Notes" with a white underline. Below it, the text "ID: 1234629" is visible. To the right of the "Notes" field are two grey toggle buttons: "Tax Exempt" and "Allow Negative Store Credit". At the bottom of the screen, there are two buttons: a green "Save" button on the left and a grey "Cancel" button on the right.

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/>

