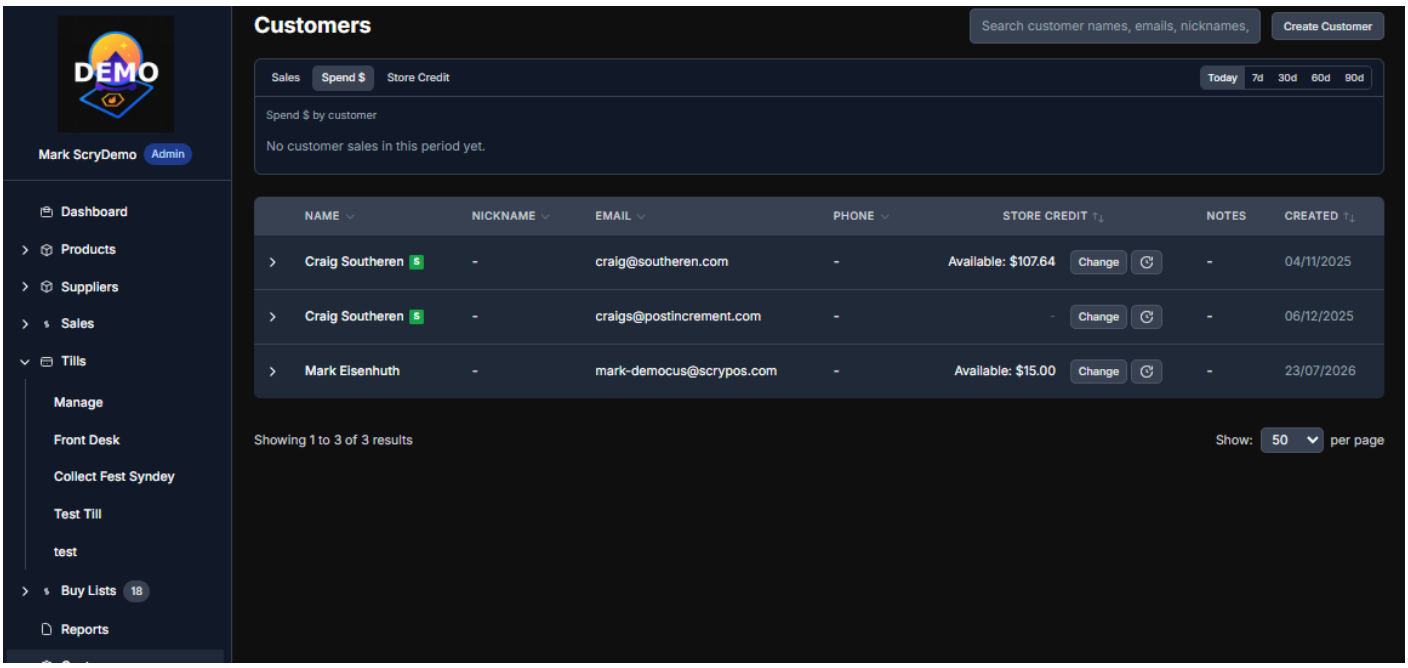
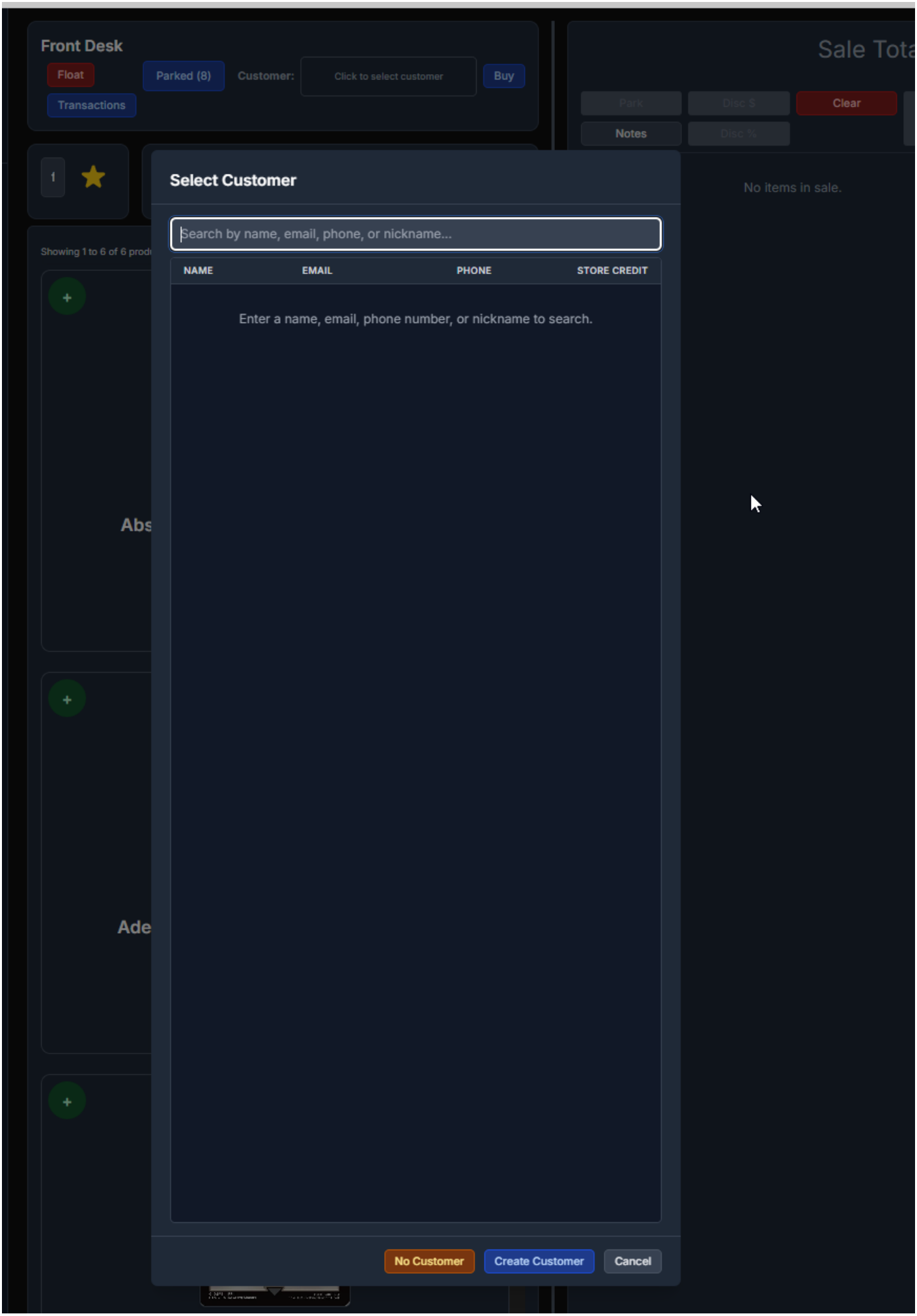
Creating Customers

Customer can create themselves by placing orders on your Shopify website and by accessing the customer portal and creating an account but you can also create your own customers! You can do this in multiple spots for easy access

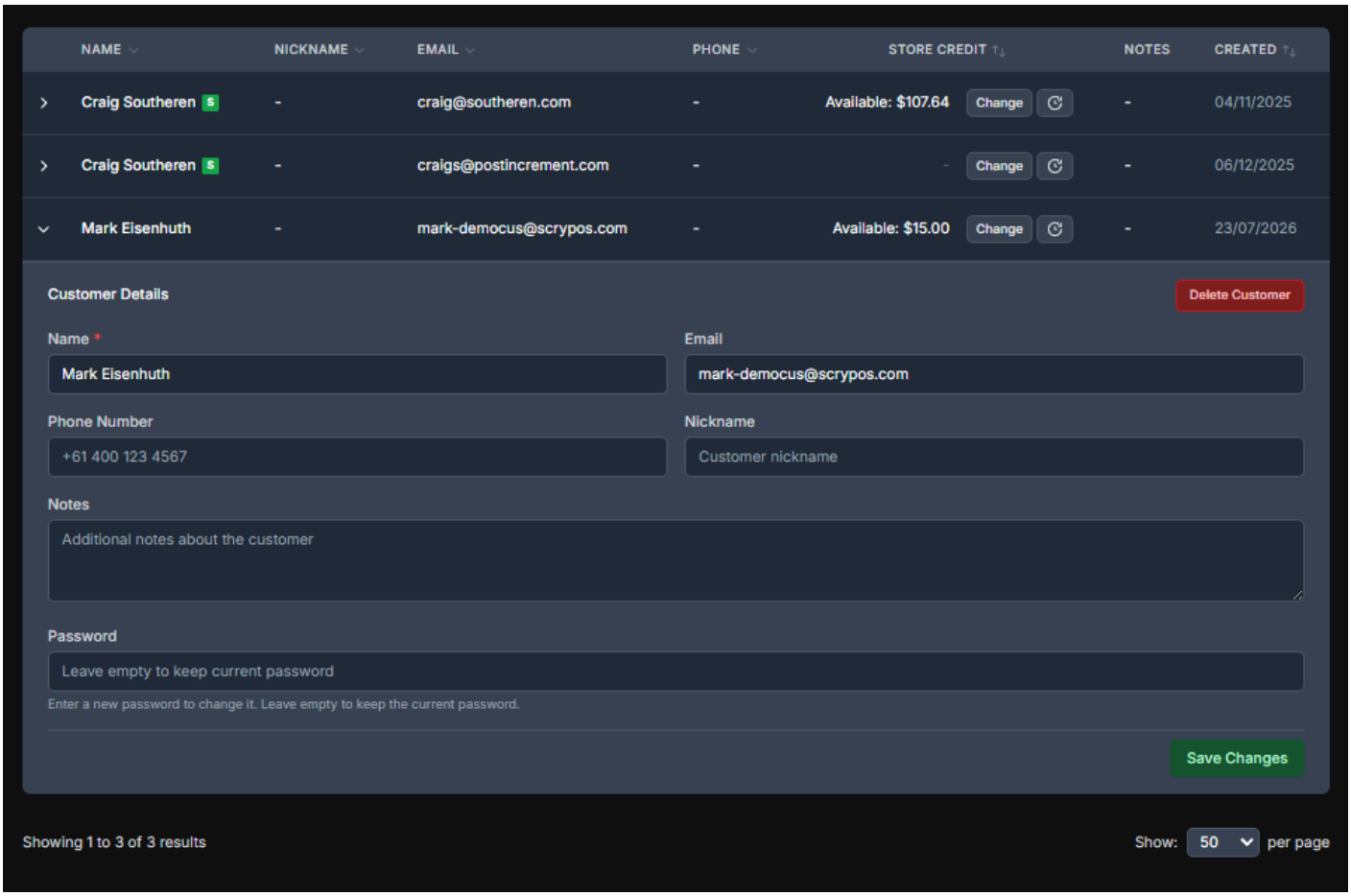
You can Go to Customer > Create Customer



While processing a POS transaction you can go "Click to select customer" "Create Customer"
When creating a buy/sell list on behalf of a customer you can create the customer as you are creating the list

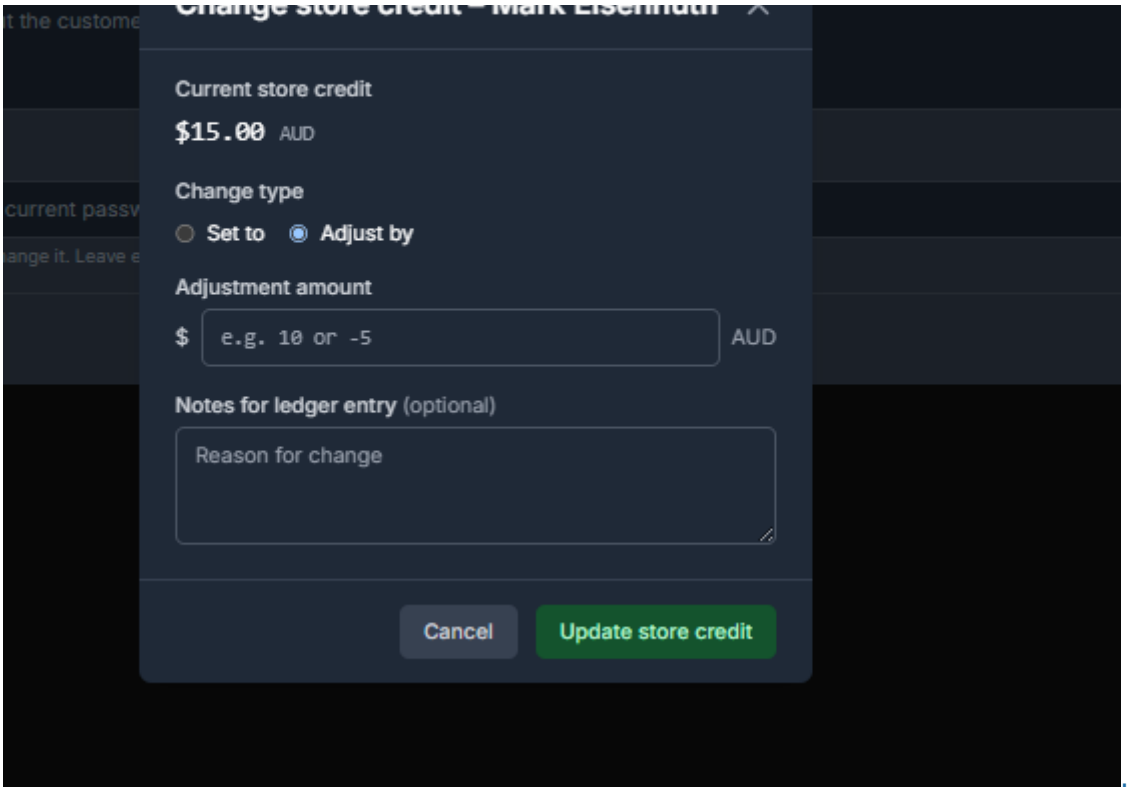

Front Desk
Float
Parked (8)
Customer:
Click to select customer
Buy
Transactions
Sale Tota
Park
Disc $
Clear
Notes
Disc %
No items in sale.
Select Customer
Search by name, email, phone, or nickname...
NAME
EMAIL
PHONE
STORE CREDIT
Enter a name, email, phone number, or nickname to search.
No Customer
Create Customer
Cancel

Customers can be created with the core fields or name, email and phone number but you can also
* Give your customers nicknames
* Add internal notes about the customer
* Set or Change their customer dashboard password to assist with password resets (they can do this on the dashboard login screen too)

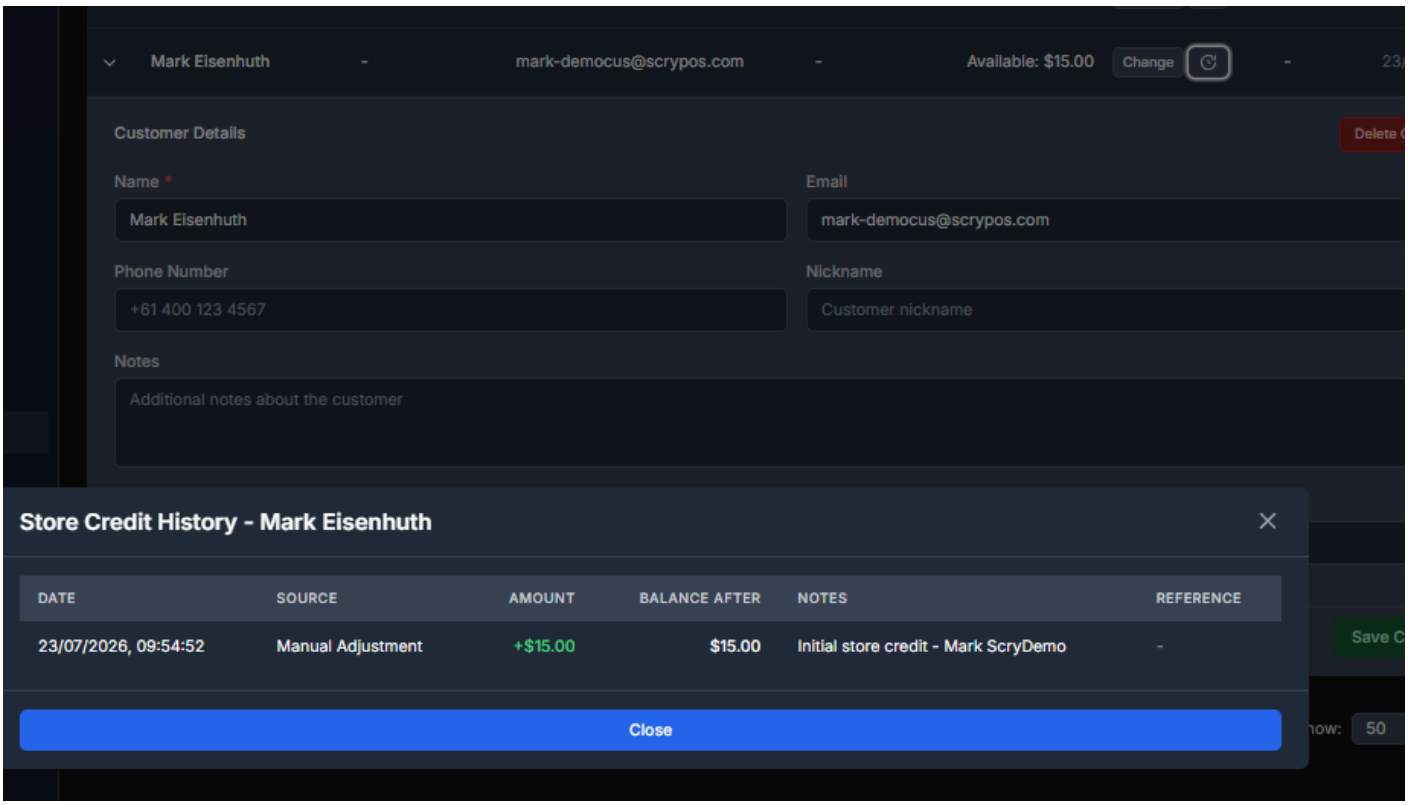


Customers can have store credit. Usually this is added through buy/sell lists but this can be added manually by clicking "change" next to their store credit on their customer record

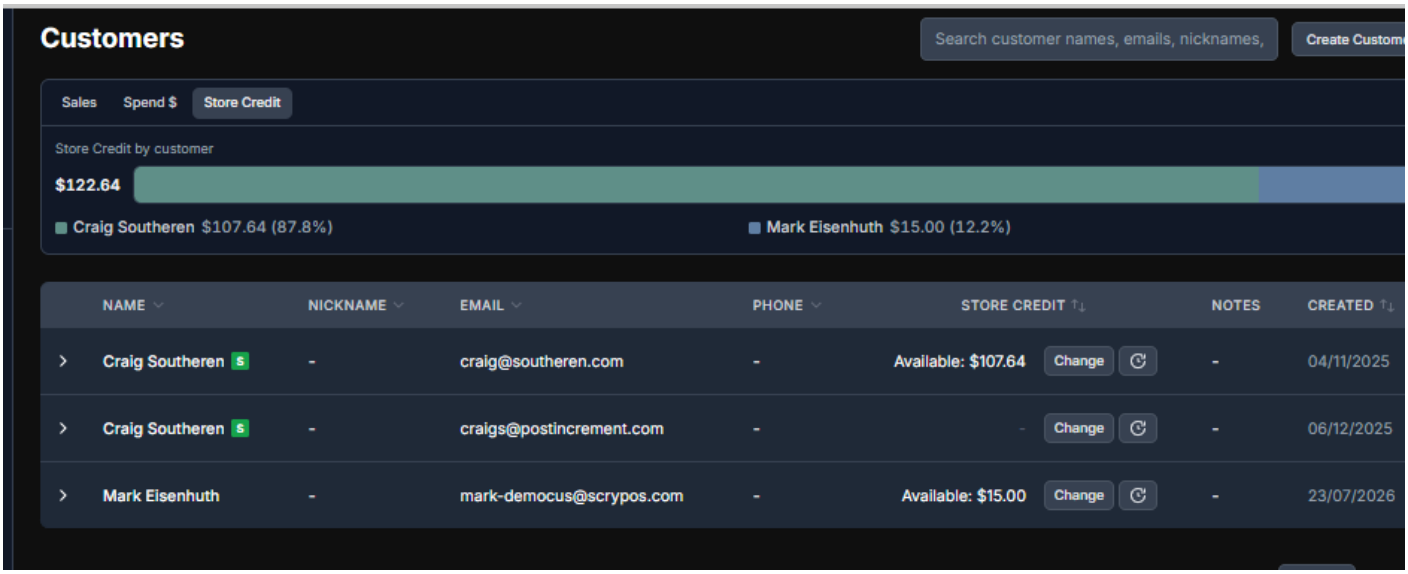
You can adjust or overwrite their credit or you can set it to a specific amount and record a note for you and the customer that says why an adjustment occurred (Customers can see this in their customer dashboard)



You can also view the full Store Credit History by clicking on the icon next to change



Note: You can view your current store credit liability using the report at the top of the customers page which will show you your total liability and top percentile of credit holders.



Revision #1
Created 2026-08-14 06:20:57 UTC by Mark Eisenhuth
Updated 2026-08-14 06:29:30 UTC by Mark Eisenhuth