

Adding Customers to Invoices

- *Adding a customer to the invoice is normally required when selling out a product with a serial number or selling out a mobile plan.*

Customer Screen Overview – Video Tutorial




1. Navigate to the “Sale” tab & click “Sell Product”.
2. Click on the customer Icon to enter in customer details.



The screenshot shows the ClickPOS interface for a 'Product Sale - Invoice No ...'. At the top, there are tabs for 'Home' and 'Sale'. Under the 'Sale' tab, there are buttons for 'Sell Product' (highlighted in green), 'Search Old Sale', and 'Lay-By Payment'. Below this is a sub-header with a dollar sign icon and the text 'Product Sale - Invoice No ...'. There are three sub-tabs: 'Main', 'Product', and 'Phone'. The 'Main' tab is active. On the left, there is a customer icon (highlighted in yellow) and a 'Sale' date field set to '10/11/2010'. Other fields include 'Discount' (0%), 'OrderNo', 'InternalNo', 'Rep' (dropdown), 'Advert' (dropdown), 'Notes', and 'Financial' (Awaiting Extract dropdown). At the bottom, there are checkboxes for 'View', 'Free', 'Refund', 'LayBy', and 'Qty' (set to 1), and a 'Barcode' field. At the very bottom, there are 'OK' and 'Clear' buttons.

The following screen has multiple tabs to that can be filled and edited. For a standard customer you can just fill in the “Bill To” tab. This is where basic information about the customer is held, such as Name, Address, Contact Number and Company details. You can also select the method of how they should be contacted for future promotions and advertising (however on this page, only the name field is mandatory).

 **Customer**

Bill To Extended Ship To Account Contact Loyalty Search

Name **Mr** John Last **Smith**
Job Title
Company
Trading As
Tel Business Fax
Tel Home Mob
Email
Password
Website

Address 1: 1 Smith St
Address 2:
Address 3:
Suburb MELBOURNE
Post/ZIP 3001 State VIC
Country AUSTRALIA
Loyalty
Contact Method for future promotions and advertising
 SMS Phone Email Post