

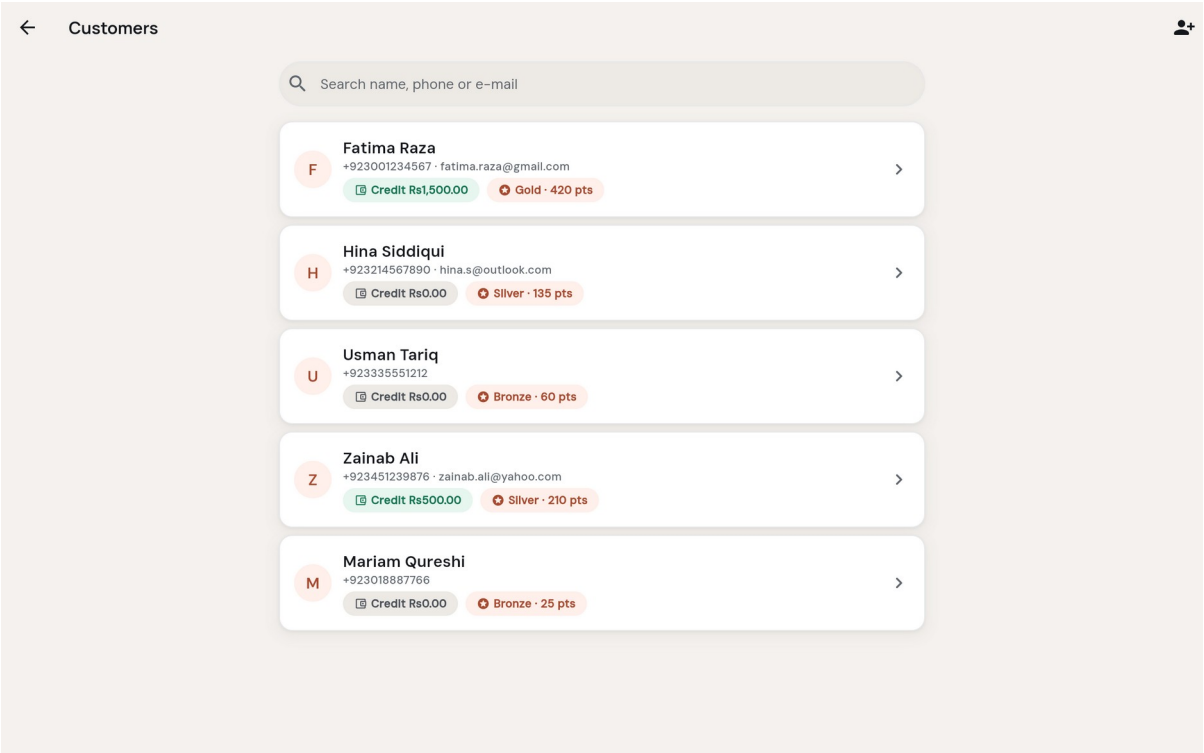
Chapter 7: Customers

Saving your regular customers lets you see what they bought, give them store credit, and let them collect loyalty points.

Screen 7.1: Customers

Use case: find a customer, or add a new one.

Who: everyone can search and add. Editing a customer is for managers.



Customers list with search and the add customer button

1. Open **More → Customers**.
2. Search by name, phone or e-mail.
3. To add a customer, tap **+**, type the **Name** (the only required field) and, if you have them, the **Phone**, **E-mail** and other details. Turn on **OK to send offers** only if the customer agrees to receive marketing messages.
4. Tap **Save customer**.

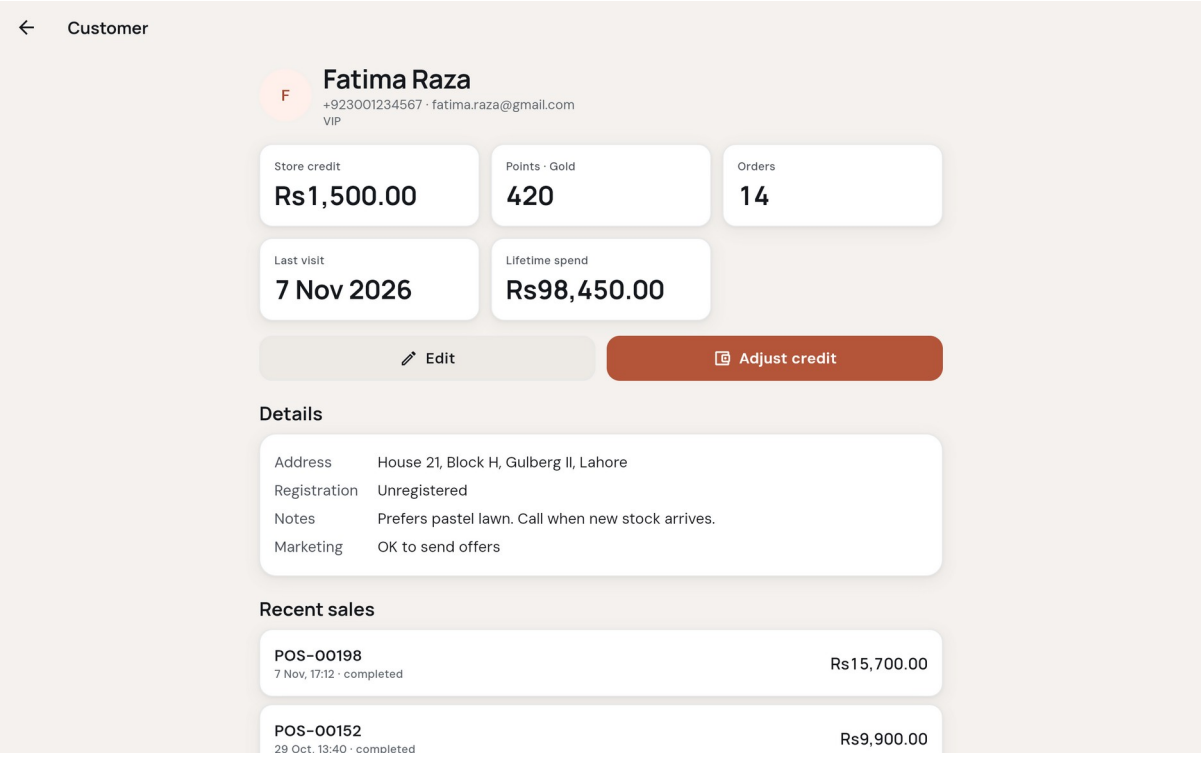
What you'll see: "{name} added." If someone already has that phone number, the app shows that customer instead of making a copy.

> Note: customers can only be added or changed while the till is online.

Screen 7.2: Customer profile and store credit

Use case: see a customer's credit, points and recent purchases, and (for managers) adjust their store credit.

Who: everyone sees the profile; managers can **Edit** and **Adjust credit**.



Customer profile with Store credit, Points, Orders, Recent sales and Store credit history

The profile shows **Store credit**, **Points**, **Orders**, **Last visit** and **Recent sales** (tap a sale to open it).

To add or remove store credit (manager):

1. Tap **Adjust credit**.
2. Choose **Add credit** or **Remove credit**.
3. Type the **Amount** and a **Note** explaining why.
4. Tap **Confirm**.

Every change is listed in **Store credit history**.

> Note: above the manager limit (100 in your currency unless the owner changed it), only the owner can adjust credit.

باب 7: گاہک

اسکرین 7.1: **More → Customers** — **Customers** کھولیں اور نام، فون یا ای میل سے تلاش کریں۔ نیا گاہک شامل کرنے کے لیے + دبائیں، **Name** (واحد لازمی خانہ) اور فون وغیرہ لکھیں اور **Save customer** دبائیں۔ **OK to send offers** صرف گاہک کی رضامندی سے آن کریں۔ اس کے لیے انٹرنیٹ چاہیے۔

اسکرین 7.2: گاہک کی پروفائل — **Orders**، **Points**، **Store credit** اور **Recent sales** نظر آتے ہیں۔ مینیجر **Adjust credit** سے **Add credit** یا **Remove credit** کر سکتا ہے: رقم اور **Note** لکھ کر **Confirm**۔ مینیجر کی حد سے زیادہ تبدیلی صرف مالک کر سکتا ہے۔