

Summary


Use this screen to search for and manage customers.

You can also use the search in the top right of the CMS to locate a Customer record

You can also use it to register a new customer.

New Customers may also be registered by Customers online, or in the POS

Key to Icons

 = edit

 = registered customer

 = customer pending registration

 = inactive customer

Adding a New Customer

To add a new Customer, click the 'Register' button in the top right.

This will take you to a screen where you can add [customer information](#).

FAQs

How do I find Customers with an outstanding balance?

This can be done on the Customer list screen. Use the filters to choose an account type, and then toggle the button for 'with balance'.

Can I reset a Customer Password?

Yes - this is done on the Customer Details tab when [Managing Customer Information](#).

Customers may also reset their password via your website.

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