

Adding a Customer to a Sales Order in the EPoS

When raising an order in the EPoS, you can choose to add a new customer by entering their details manually, or you can search for an existing customer that is already registered with you.

New Customer

You can enter new customer details to a new order in the EPoS by simply clicking "Add Customer". Once you have done this you will be able to add the following details;

- Title, first name and surname.
- Address, postcode and country.
- "Where did you hear about us?"
- Contact details including Email address, telephone number and alternate telephone number.

Contact preferences for the customer can be updated using the "Contact Preferences" button under the email address.

Contact details

testcustomer@iconography.co.uk

Contact Preferences

Within the contact preferences you can select which public and private mailing groups to add them to (these will be pulled from the [Manage Groups](#) screen).

Edit contact preferences

Public mailing groups:

Newsletter

Special Offers

Private mailing groups:

Gold Customers

Private VIP group

Close

Once you are happy that the details have been entered correctly, click "Update".

Existing Customer

1. Click "Create New Order"

Image not found or type unknown



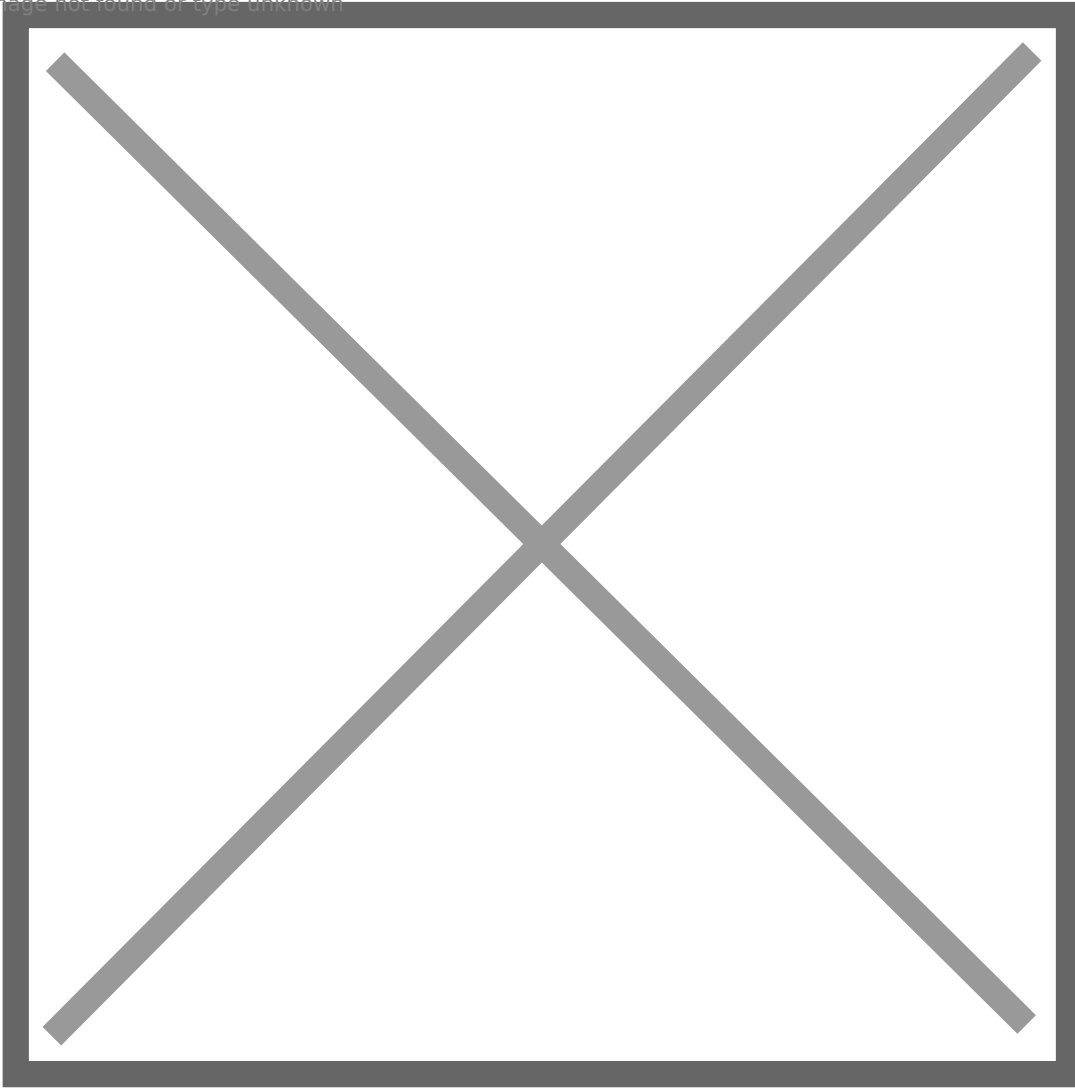
2. Click "Add Customer"

Image not found or type unknown



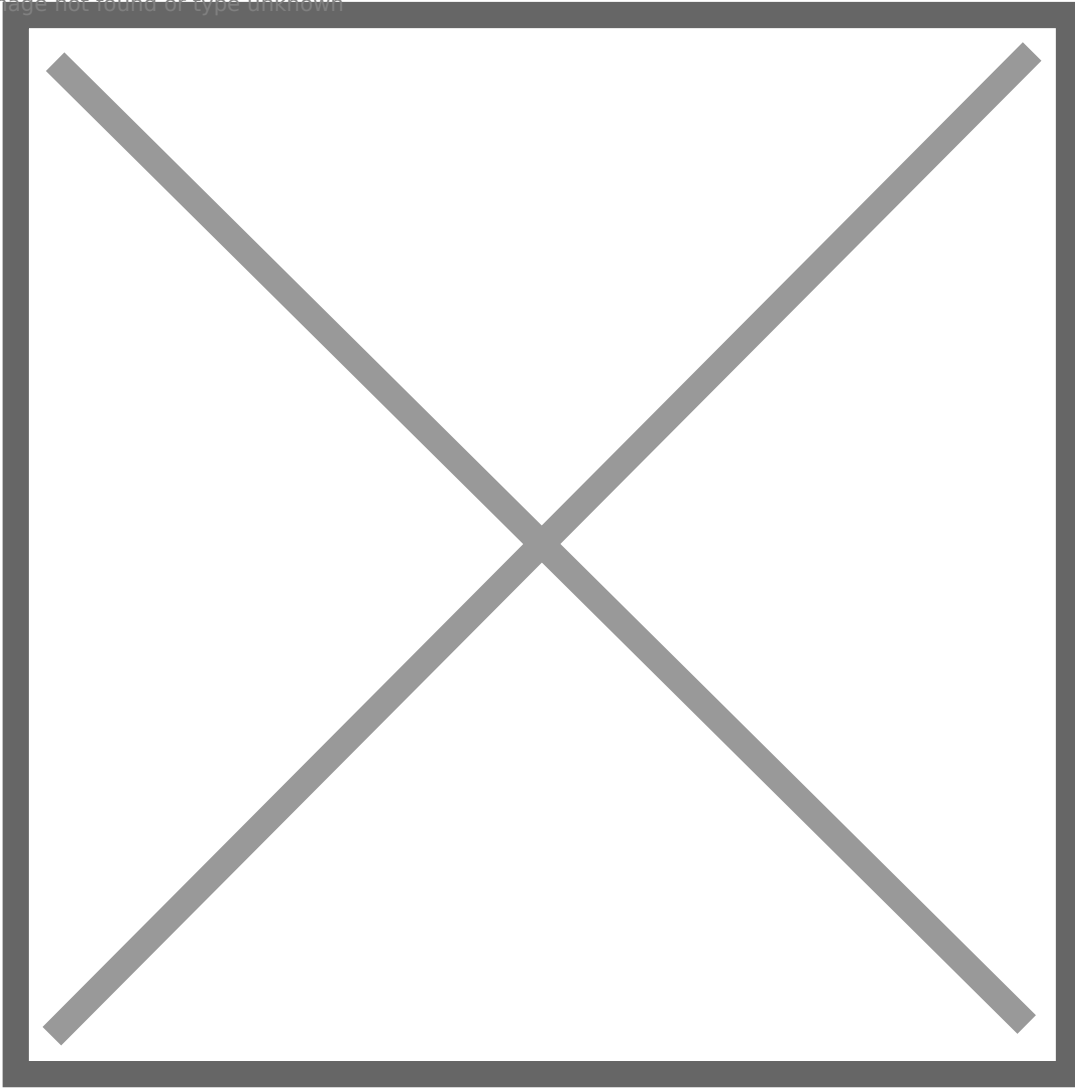
3. You can search for an existing customer using their surname, postcode, email or loyalty code.

Image not found or type unknown



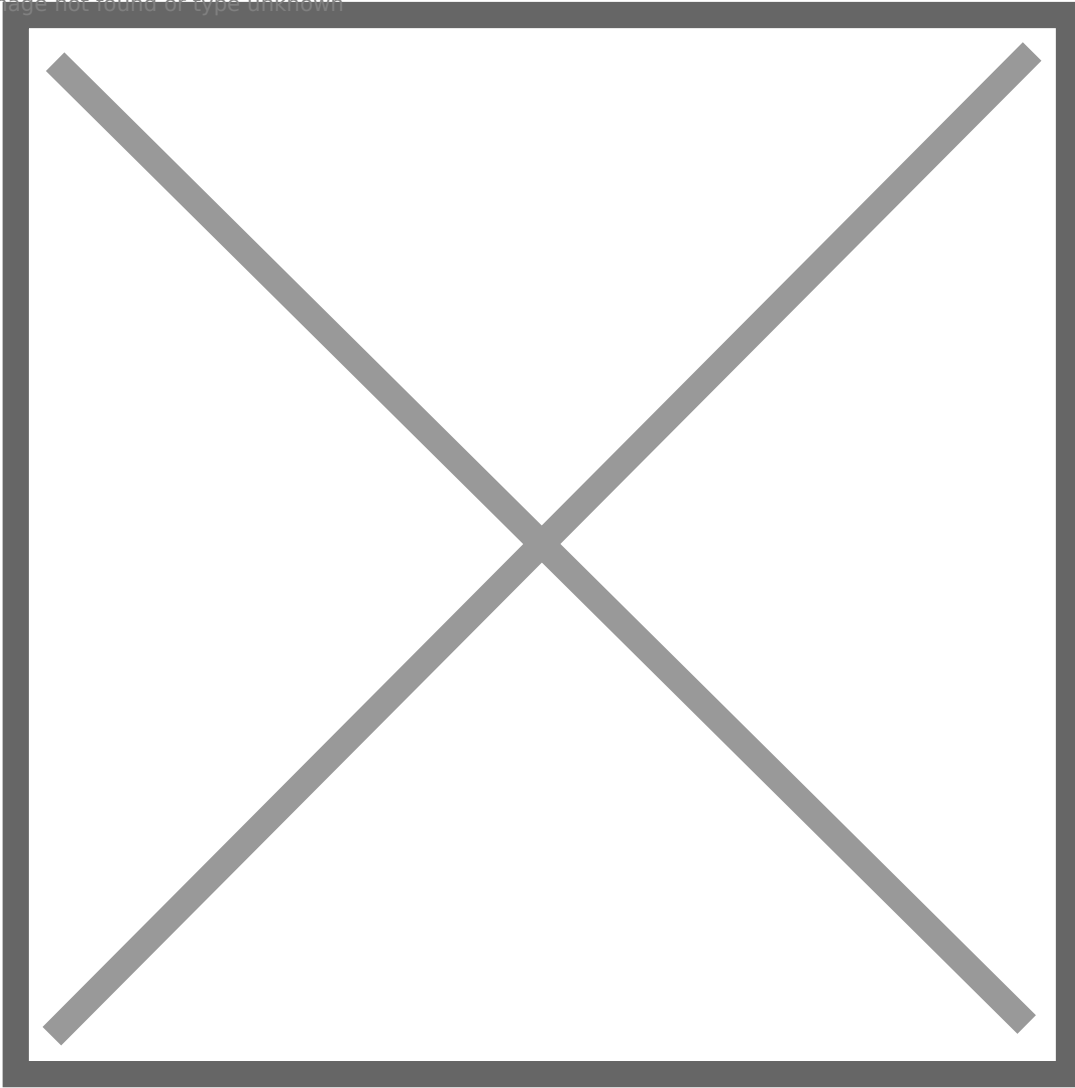
4. Click search to return matching results.

Image not found or type unknown



5. Click "add" when you have found the appropriate customer.

Image not found or type unknown



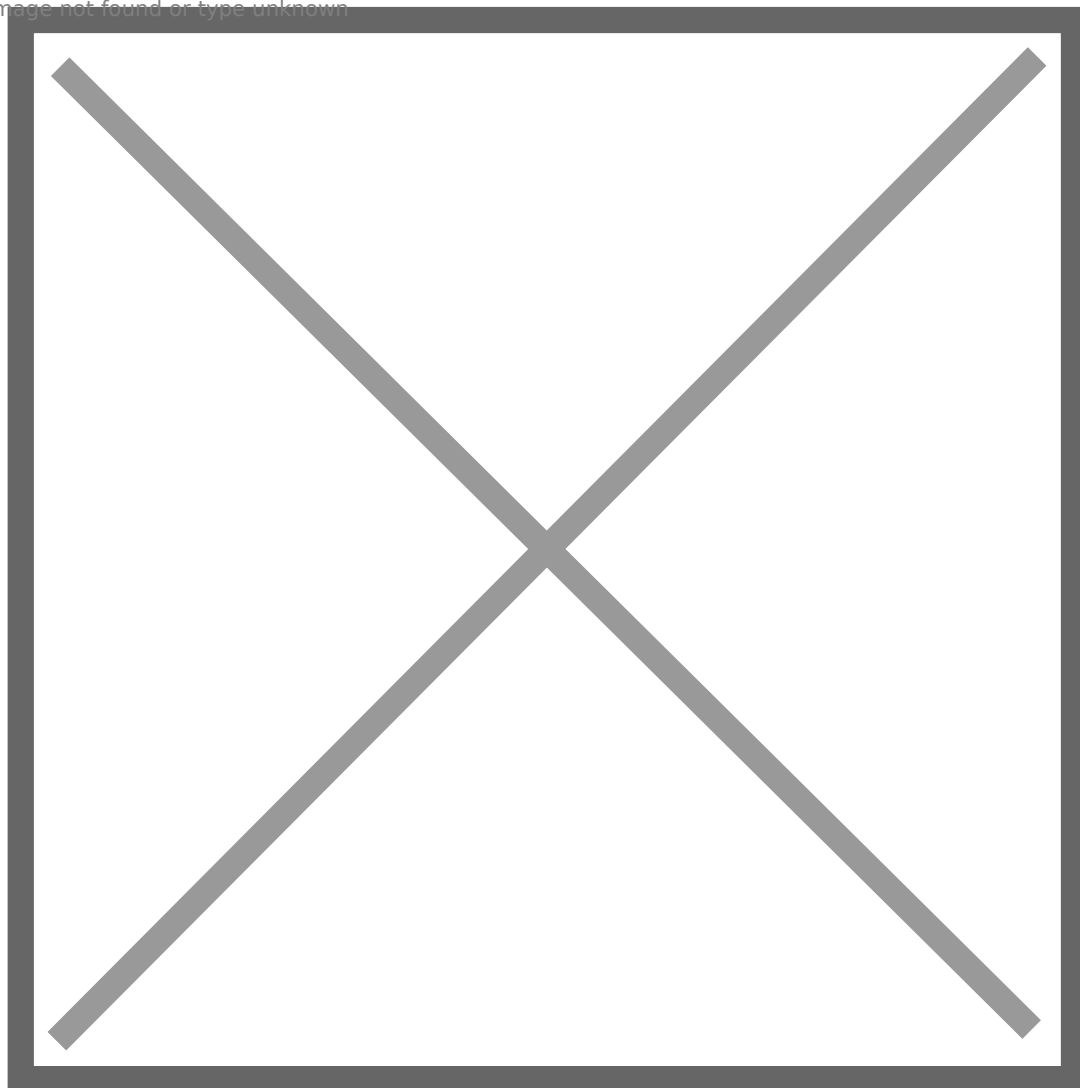
6. The customer, along with all of their contact details, has been added to the order successfully.

Image not found or type unknown



7. You can choose to amend or add missing details manually if required.

Image not found or type unknown



Revision #4

Created 6 May 2025 13:25:16 by Mike

Updated 13 May 2025 09:49:04 by Lee