Correcting Customer Sale Information

Customer Management · https://retailedge.com/docs/correcting-customer-sale-information

It is very useful to add a customer to the sale. However, mistakes can happen during this process. You can easily prevent or correct these mistakes with a few simple techniques and functions.

First look up the customer

If you make it a policy to always lookup the customer before creating a new customer, you can prevent customer duplications. We find that many people end up with lots of duplications because of failure to look up or find the right customer.

Don't know the customer's name?

Ask them for their phone number. On the sales screen if you type a slash (/) at the beginning of the search, RetailEdge will lookup the customer's phone number for the current search. RetailEdge will revert back to the default search on the next lookup.

Consider using customer cards

Consider starting a program using customer loyalty cards. This give your clerks an easy way to add the customer to the sale, limits duplicates, and provides wallet advertising for your store.

Change customer utility

If you need to change the customer after the sale, just right click the sale in the Sales Manager and select Change Customer. This will allow you to change the current customer or add a new customer to the sale.

Merge customer utility

If you need to change more than one sale or merge old sales history into a newer customer, you can use the Merge Customer function. This can be accessed from the Tools | Global Change menu item.