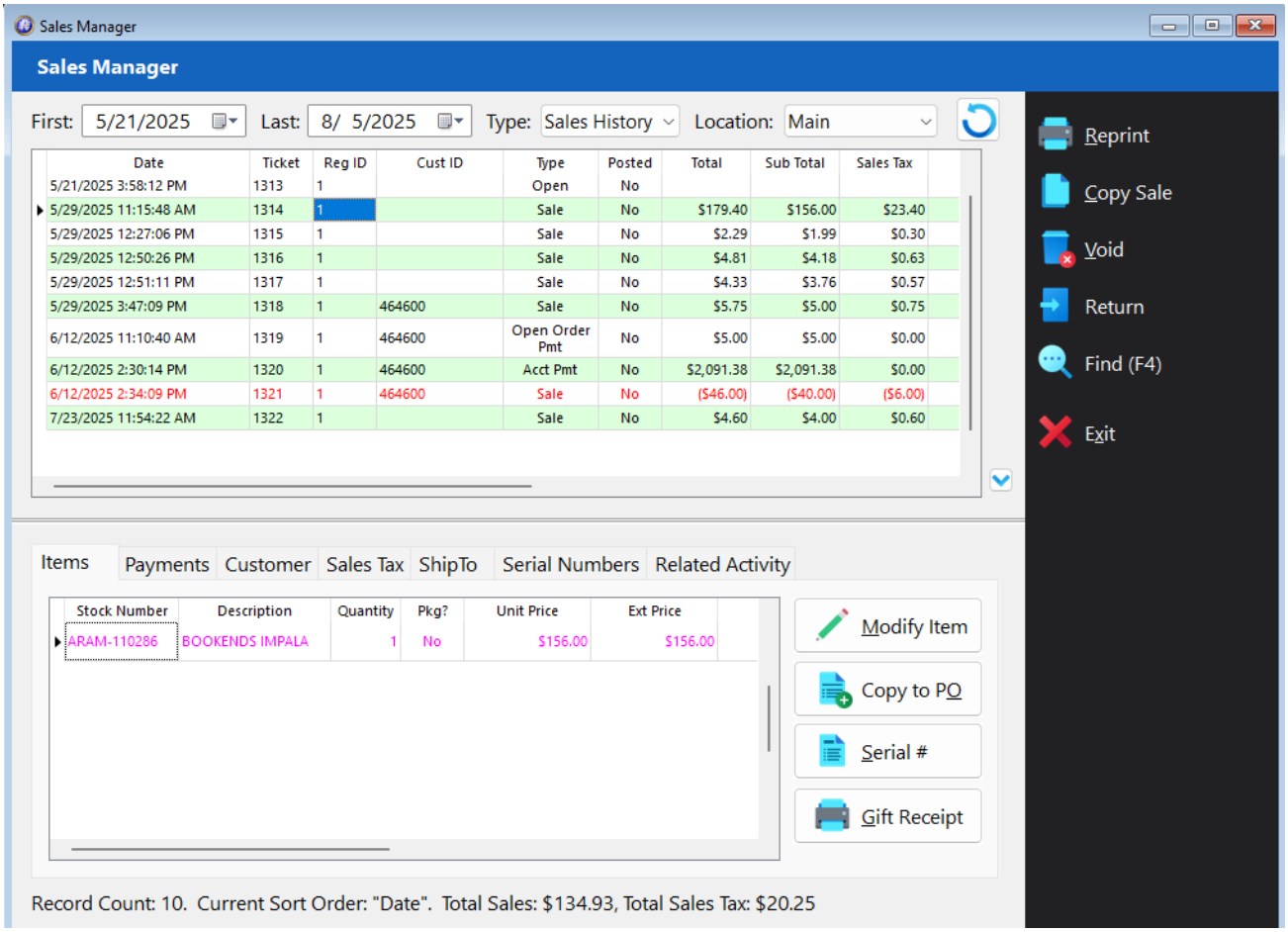
How to Change or Add a Customer on Previous Transactions

Customer Management · https://retailedge.com/docs/how-to-change-or-add-a-customer-on-previous-transactions

If you need to change a customer or add a customer to a previous transaction you can use the Change Customer Utility in the the RetailEdge Sales Manager.

You will need to have a customer in your Database in order to use this feature, you can learn about Creating Customers here.

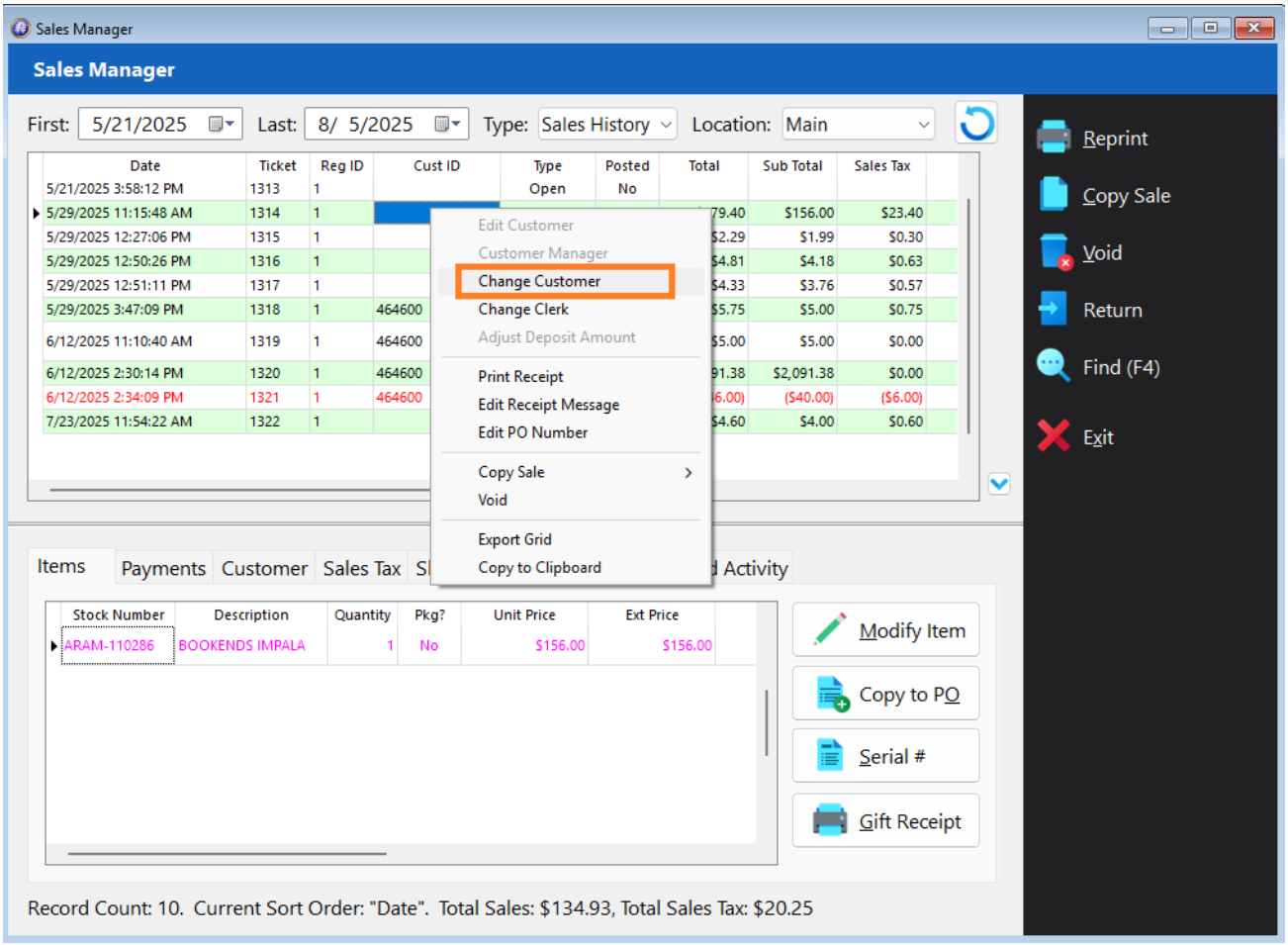
1. Locate the transaction in the RetailEdge Sales Manager.



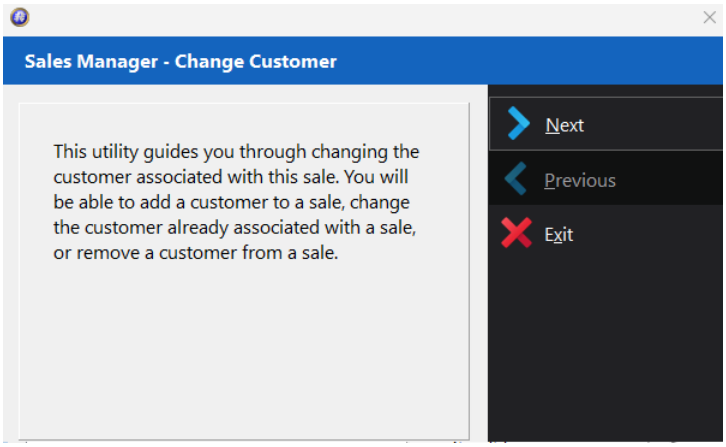
Date	Ticket	Reg ID	Cust ID	Type	Posted	Total	Sub Total	Sales Tax
5/21/2025 3:58:12 PM	1313	1		Open	No			
5/29/2025 11:15:48 AM	1314	1		Sale	No	$179.40	$156.00	$23.40
5/29/2025 12:27:06 PM	1315	1		Sale	No	$2.29	$1.99	$0.30
5/29/2025 12:50:26 PM	1316	1		Sale	No	$4.81	$4.18	$0.63
5/29/2025 12:51:11 PM	1317	1		Sale	No	$4.33	$3.76	$0.57
5/29/2025 3:47:09 PM	1318	1	464600	Sale	No	$5.75	$5.00	$0.75
6/12/2025 11:10:40 AM	1319	1	464600	Open Order Pmt	No	$5.00	$5.00	$0.00
6/12/2025 2:30:14 PM	1320	1	464600	Acct Pmt	No	$2,091.38	$2,091.38	$0.00
6/12/2025 2:34:09 PM	1321	1	464600	Sale	No	($46.00)	($40.00)	($6.00)
7/23/2025 11:54:22 AM	1322	1		Sale	No	$4.60	$4.00	$0.60

Stock Number	Description	Quantity	Pkg?	Unit Price	Ext Price
ARAM-110286	BOOKENDS IMPALA	1	No	$156.00	$156.00

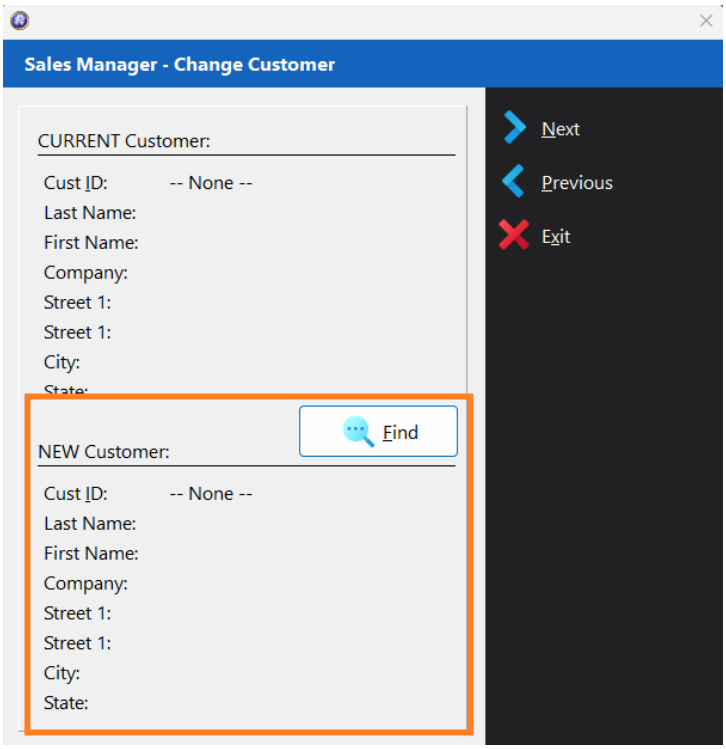
2. Right Click on the Transaction and Select Change Customer.



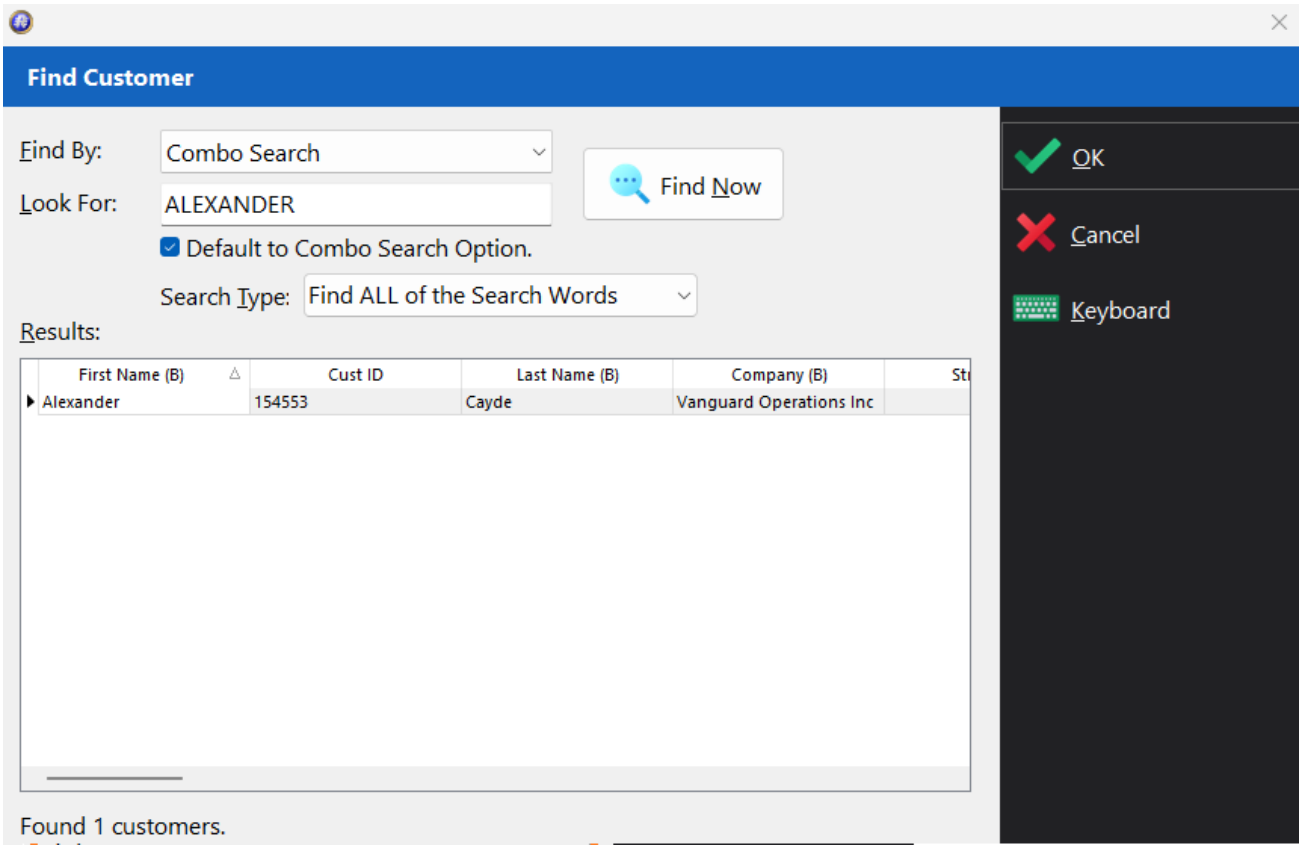
3. On the Sales Manager - Changer Customer Select Next.



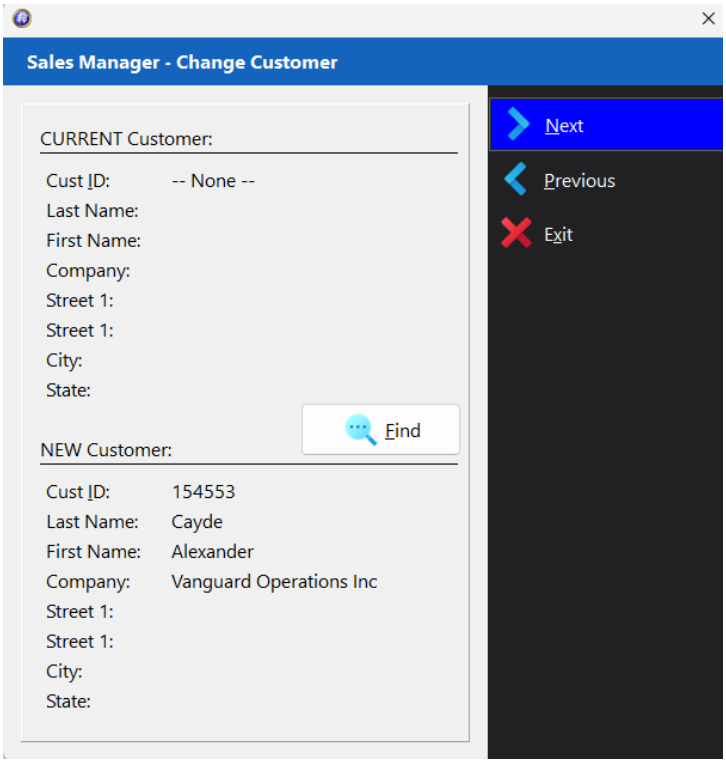
4. In the New Customer Section Select Find.



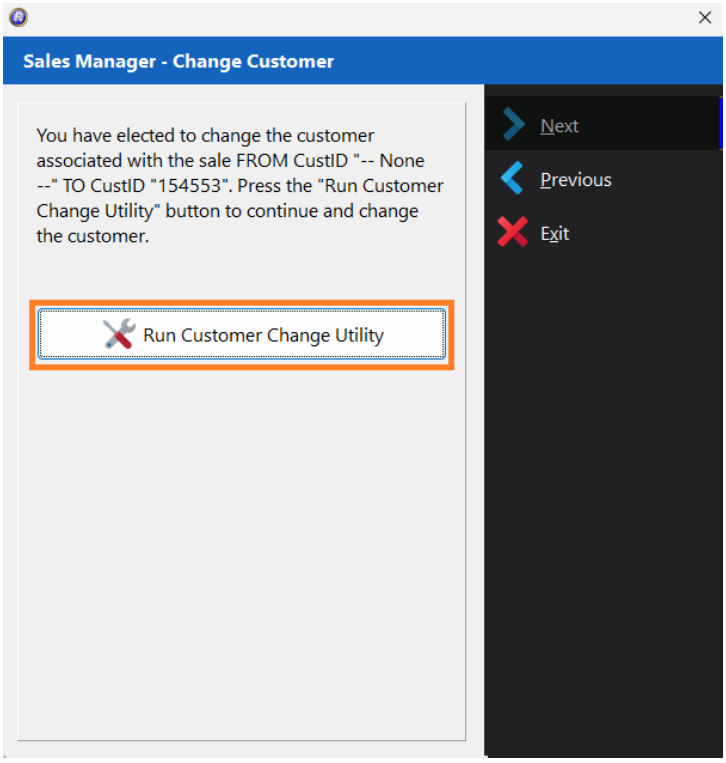
5. Locate the Customer you would like to add in the Find Customer Window.



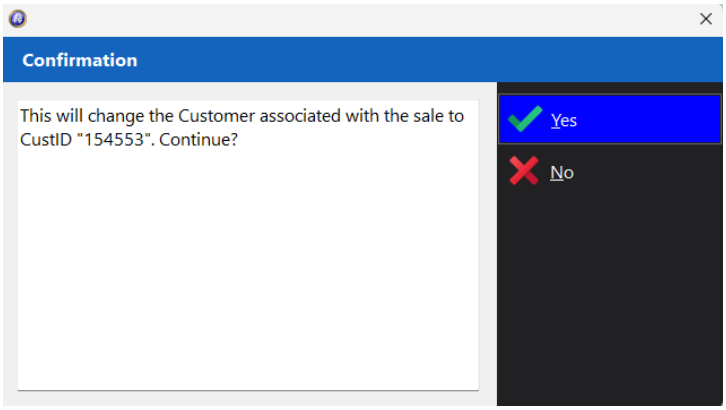
6. Select Next



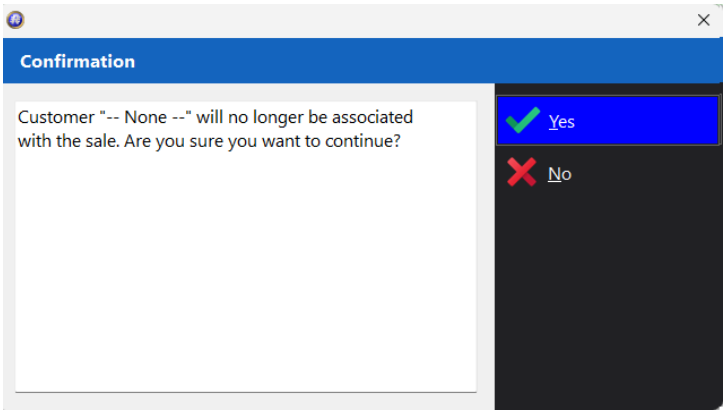
7. Select Run Customer Changer Utility.



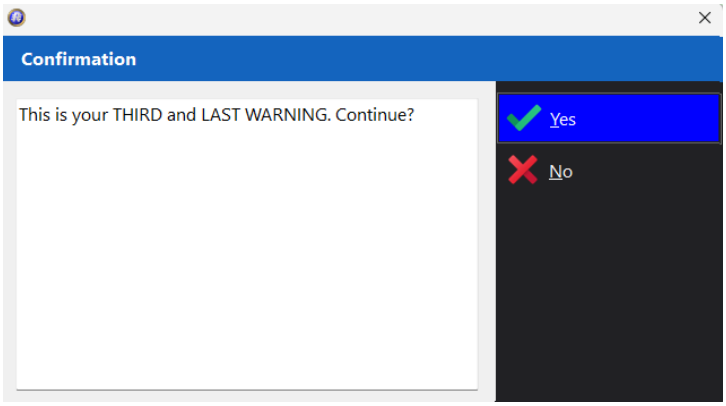
8. Select Yes on the Confirmation Screen if you want to proceed. Please read the contents of the Screen.



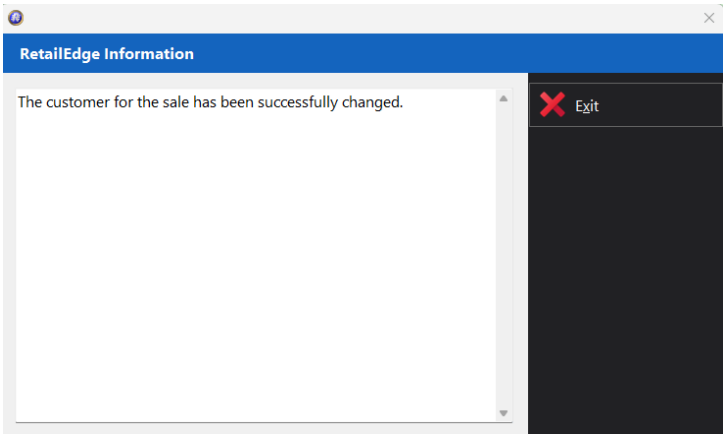
9. Select Yes on the Confirmation Screen if you want to proceed. Please read the contents of the Screen.



10. Select Yes on the Confirmation Screen if you want to proceed. This is the third and last warning.



11. The Utility will complete and select Exit.


RetailEdge Information
The customer for the sale has been successfully changed.
Exit