

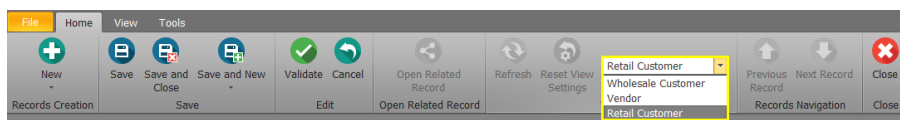
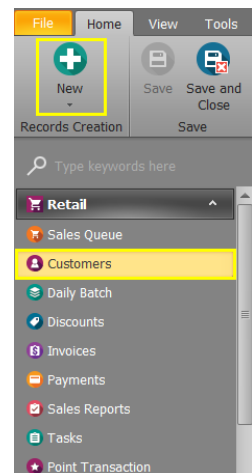
Add a Retail Customer

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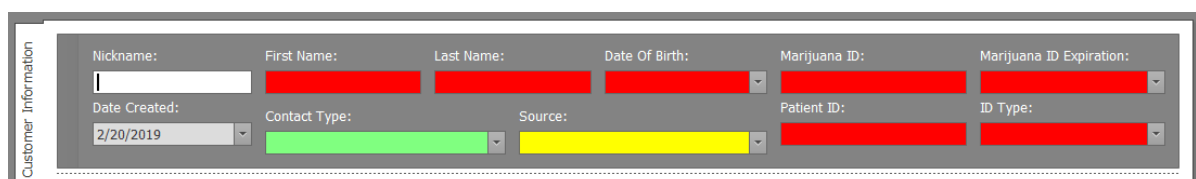
Users have the ability to create Retail Customers in KLÉR. Creation of these retail customers results in the ability to assign Discounts to them and generate a Retail Order on their behalf. This means that until the retail customer has been created, you can't sell to them!

To add a Retail Customer, follow the steps below:

- Step 1 - In the Retail module select **Customers** from the navigation pane and then click the **New** button. This will open a new tab where you can add your new customer. Be sure **Retail Customer** is selected from the top navigation bar.



- Step 2 - Begin by filling out the data in the **Customer Information** section. Red fields are required and yellow fields are optional:

A screenshot of the 'Customer Information' form. The form has a vertical label 'Customer Information' on the left. It contains several input fields: 'Nickname' (text), 'First Name' (text, red background), 'Last Name' (text, red background), 'Date Of Birth' (date picker, red background), 'Marijuana ID' (text, red background), 'Marijuana ID Expiration' (date picker, red background), 'Date Created' (date picker, grey background), 'Contact Type' (dropdown, green background), 'Source' (dropdown, yellow background), 'Patient ID' (text, red background), and 'ID Type' (dropdown, red background).

- **Nickname** - an alternate name the customer would like to be used when purchasing
- **First Name** - the customer's first name
- **Last Name** - the customer's last name
- **Date Of Birth** - the customer's date of birth
- **Marijuana ID** - the unique ID number on the marijuana card (*this can be scanned from the marijuana card*)
- **Marijuana ID Expiration** - the expiration date printed on the marijuana

card

- **Date Created** - this field will auto-populate with the date you first created the record and cannot be edited
- **Contact Type** - set this field to the type of customer you are creating to be used later when filtering customers and setting discounts (*additional contact types can be added by contacting your KLĒR Specialist*)
- **Source** - select how the customer heard about or found your location (*you can also choose to add a new marketing source*)
- **Patient ID** - the printed ID number on the customer's secondary form of identification
- **ID Type** - select the type of secondary form of identification being used or add a new type of identification

- **Step 3 - Continue by filling in the Customers Address/Phone/Email.**

- **Address** - the customer's address with street, city, state and ZIP
 - **Do Not Market Address** - check this box if the Customer does not want to receive marketing materials at this address
- **Phone** - the customer's main and secondary phone number
 - **Do Not Text** - check this box if the Customer does not want to receive messages at this number
- **Email** - the customer's email address
 - **Do Not Email** - check this box if the Customer does not want to receive emails from your location

The screenshot shows a form titled "Address/Phone/Email" with the following fields and options:

- Address 1:** A text input field with a yellow highlight.
- Address 2:** A text input field.
- City:** A text input field with a yellow highlight.
- State:** A dropdown menu with a yellow highlight and a close button (X).
- Zip:** A text input field with a yellow highlight.
- Do Not Market Address**
- Phone 1:** A text input field with a yellow highlight.
- Do Not Text**
- Phone 2:** A text input field.
- Do Not Text**
- Email/Username:** A text input field with a yellow highlight.
- Do Not Email**

- Step 4 - If the customer has a discount assigned to them, such as a veteran or agent discount you can assign it when creating the customer.

The image shows a form with two fields: 'Discount' and 'Discount Expiration'. The 'Discount' field is a dropdown menu with a green bar, and the 'Discount Expiration' field is a date picker.

- **Discount** - choose from a list of previously created discounts that can be associated to this customer (*discounts may also be assigned by contact type, so ensure your customer has been marked appropriately*)
 - **Discount Expiration** - if there is an expiration date to the customer's discount, enter the date
- Step 5 - Additional important information about each customer can be found in the tabs under discount.

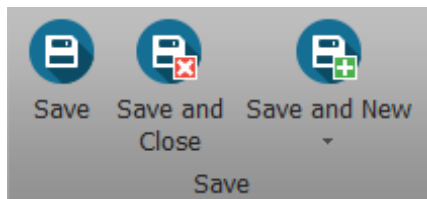
The image shows a customer profile page with several tabs: 'Reward Points', 'Sales History', 'Sales Notes', 'Tasks', and 'File Manager'. The 'Reward Points' tab is active, showing 'Points Available' and 'Points Redeemed' fields. Below these fields is a table with columns: '#', 'Transaction ID', 'Change In Points', 'Invoice Total', 'Transaction Date', and 'Created By'. The table is currently empty.

- **Reward Points** - can be set up to let your customer's know you appreciate their repeated business
 - **Points Available** - if your location has a customer points reward system, the customers points will record here as they accumulate
 - **Points Redeemed** - the points the customer has used will be totaled and populate in this field
- **Sales History** - once the retail customer has purchased items, each purchase case be viewed individually by clicking the corresponding record
- **Sales Notes** - created at any time to record special needs, future wants, or

other considerations for that customer

- **Tasks** - assigned to employees regarding the retail customer, such as calling the customer that a product they requested has arrived
- **Files Manager** - upload files related to that Customer, such as a copy of their ID or other required documents

- Step 6 - Choose one of the **Save** options.



Great job! You've created a new Customer and can now sell them your products!

