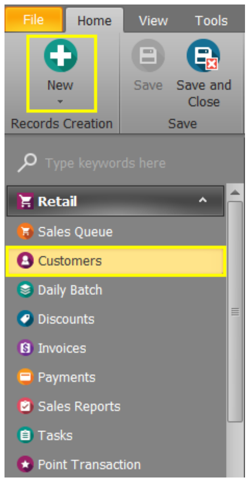
Add a Retail Customer

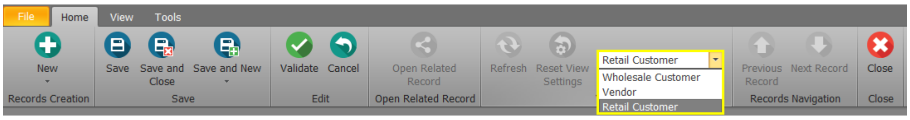
Last Modified on 02/10/2020 11:04 am MST

Users have the ability to create RetailCustomers in KLĒR. 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!

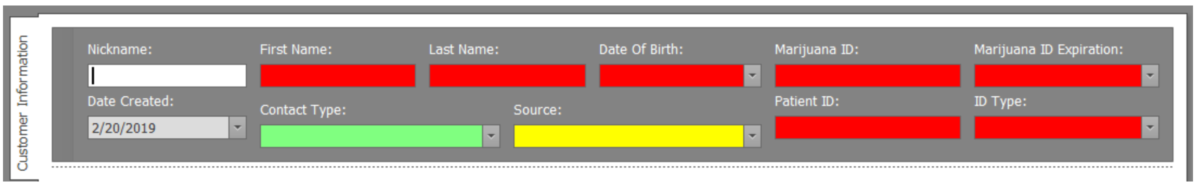


To add a Retail Customer, follow the steps below:

- 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.



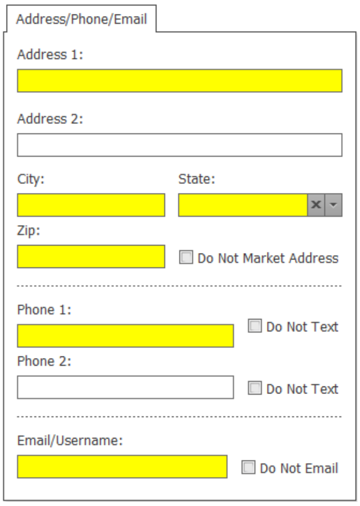
- Step 2 - Begin by filling out the data in the**Customer Information** section. Red fields are required and yellow fields are optional:



  - **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

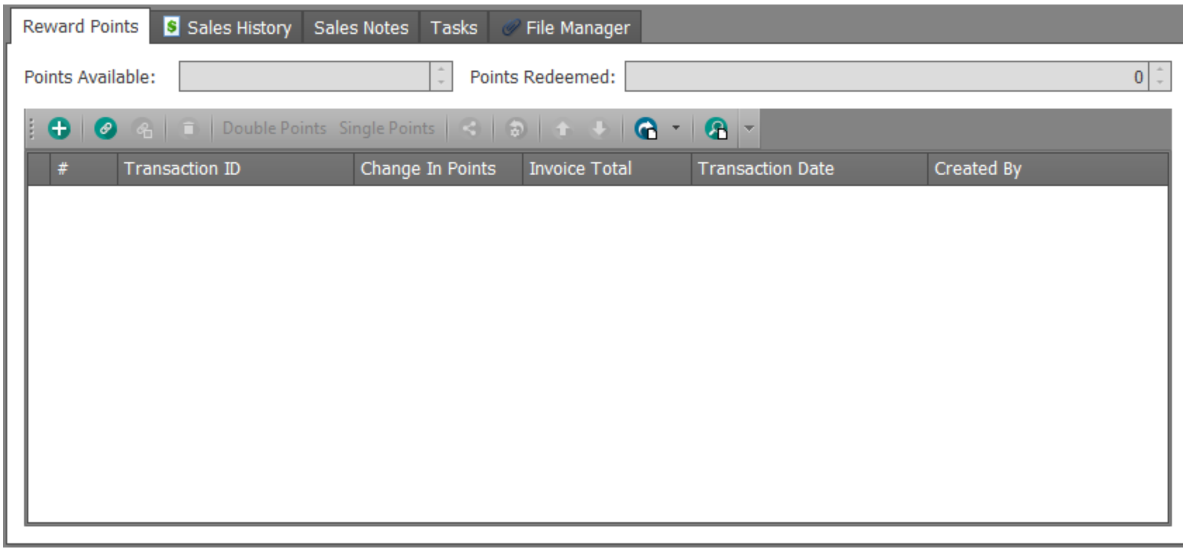


- Step 3 - Continue by filling in the Customers **Address/Phone/Email**.
  - **Address** - the customer's address with street, city, state and ZIP
    - **Do Not Market Address** - check this box if the Customer does not want to receive marketing materials at this address
  - **Phone** - the customer's 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

- 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.

  - **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

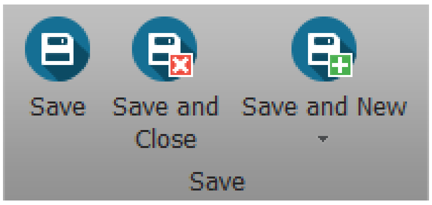
- Step 5 - Additional important information about each customer can be found in the tabs under discount.



- **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!