

# **TALLORDER SOLUTIONS**

## **HOW TO CREATE A NEW CUSTOMER ACCOUNT**

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## How to create a new customer account:

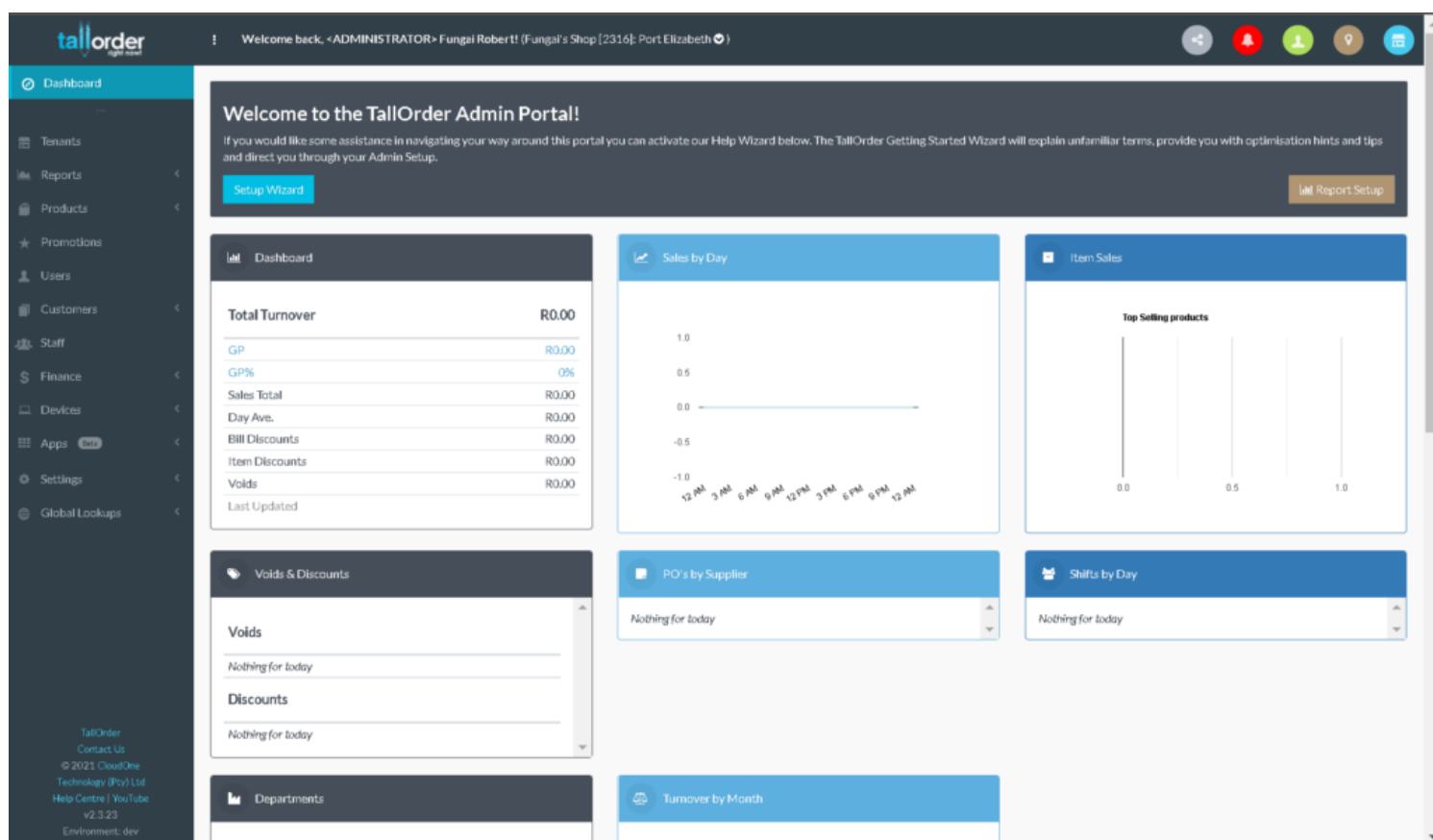
A customer account created on TallOrder is used to keep track of customer data, including customer transaction history. This data helps to set up loyalty programs and account payments. Customers can be created either on the POS interface or on TallOrder Admin dashboard using the processes listed below.

### Creating a customer on the TallOrder Admin Dashboard:

In this description there are a number of steps that will need to be followed for the customer account to be created successfully.

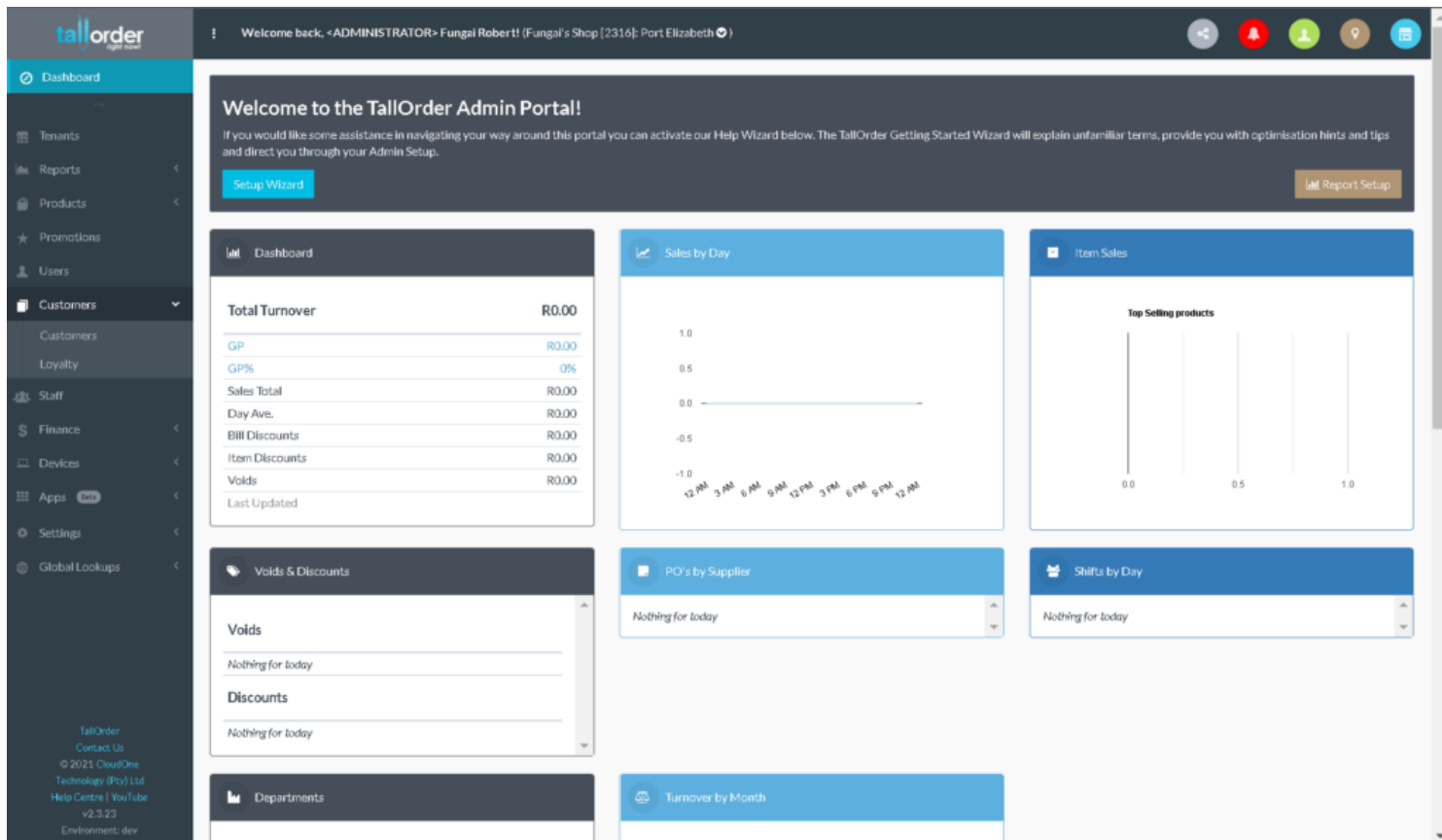
#### Step 1

Sign into the TallOrder admin dashboard:



#### Step 2

Select Customers from the list of categories on the left side of your admin page, where it will display the list of options "Customers" and "Loyalty".



### Step 3

Click on "Customers". The Customers page will be displayed with a list of all customers present in that tenant

Welcome back, <ADMINISTRATOR> Fungai Robert! (Fungai's Shop [2316]: Port Elizabeth)

**Customers**

Overview | Debtor Control Ledger | Loyalty Settings

Search

Actions

<input type="checkbox"/>	First Name	Last Name	Mobile	Email	Available Credit
<input type="checkbox"/>	Anna	Groenewald	+27 98 765 4321	anna@gmail.com	4613.00
<input type="checkbox"/>	Bill	Gates	+27 897456764	+27897456764@cloudone.mobi	2150.00
<input type="checkbox"/>	Bonzoman	Wayaseh	+27 84 534 5097	+27845345097@cloudone.mobi	3926.00
<input type="checkbox"/>	Brooke	Ned	+267 44458525	+26744458525@cloudone.mobi	0.00
<input type="checkbox"/>	Cathy	Bobo		cathybob6@gmail.com	0.00
<input type="checkbox"/>	Customer 45	weston	+267 456 7412	+2674567412@cloudone.mobi	0.00
<input type="checkbox"/>	Daniel	du Preez	+27 83 225 5667	danielp@cloudone.mobi	3908.00
<input type="checkbox"/>	Epson	Printer	0965654123	epson@gmail.com	0.00
<input type="checkbox"/>	Fungai Robert	Bobo	+27 84 522 2018	fungai@cloudone.mobi	-954.00
<input type="checkbox"/>	gerald	makaba	+267 456 1237	gerald@gmail.com	5000.00

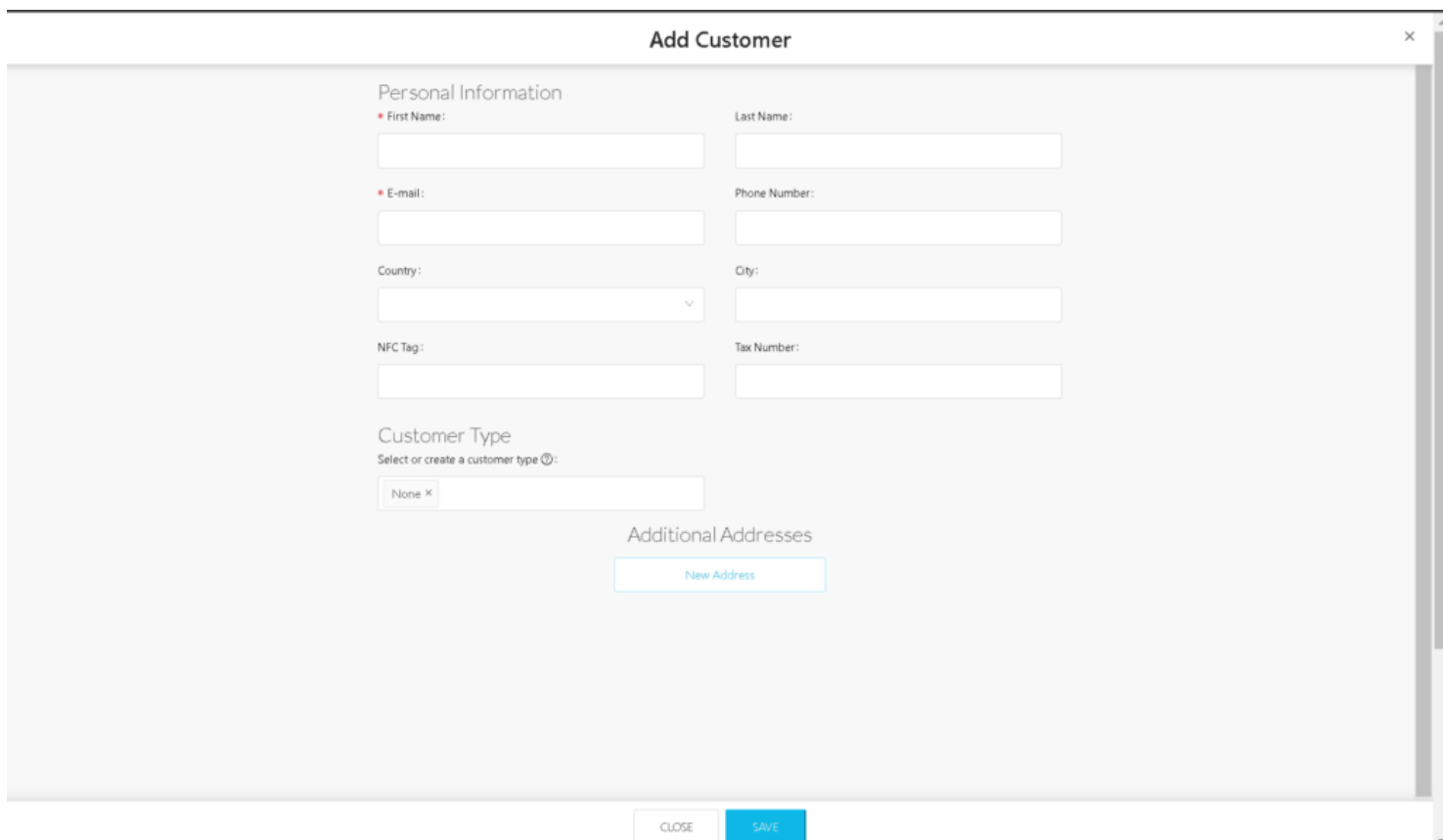
Customers: 1 to 10 of 25 < 1 2 3 > 10 / page

TallOrder  
Contact Us  
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Help Centre | YouTube  
v2.3.23  
Environment: dev

## Step 4

Click the blue “Add Customer” button on the top right corner. A customer modal will appear. Fill in the required customer details, which include:

- **First Name**
- **Last Name**
- **E-mail**
- **Phone Number**
- **Country**
- **City**
- **NFC Tag**
- **Tax Number**
- **Customer Type**



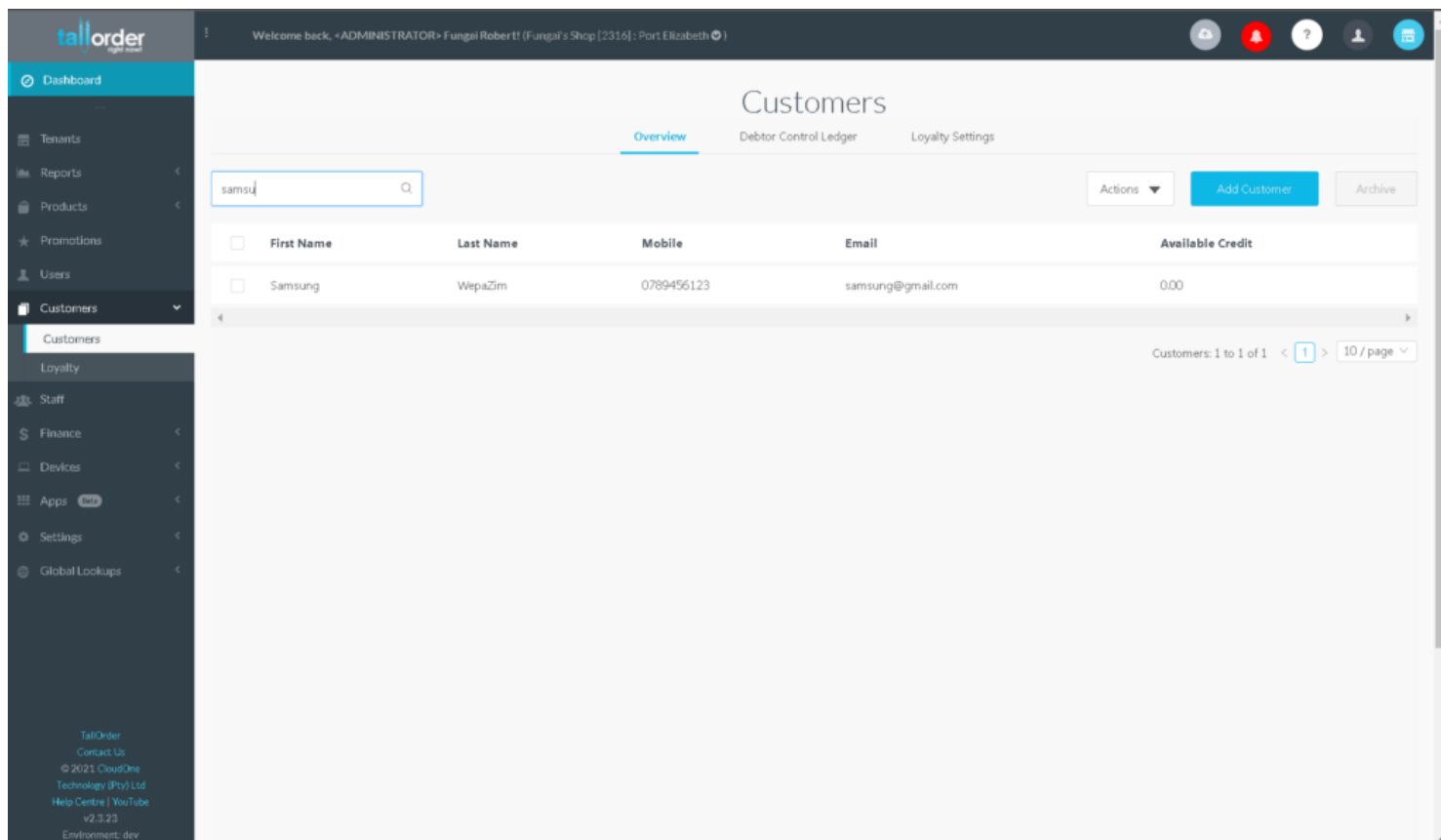
The screenshot shows a modal window titled "Add Customer" with a close button (X) in the top right corner. The form is divided into several sections:

- Personal Information:**
  - \* First Name:** Text input field.
  - Last Name:** Text input field.
  - \* E-mail:** Text input field.
  - Phone Number:** Text input field.
  - Country:** Dropdown menu.
  - City:** Text input field.
  - NFC Tag:** Text input field.
  - Tax Number:** Text input field.
- Customer Type:**
  - Text: "Select or create a customer type ⓘ"
  - Dropdown menu with "None X" selected.
- Additional Addresses:**
  - Text: "New Address" (likely a button or link).

At the bottom of the modal, there are two buttons: "CLOSE" and "SAVE".

## Step 5

After adding the required details click the "Save" button to save the customer. After the customer is saved, close the modal and search for the customer from the list of customers and click on customer to confirm if they have been saved with the required details.



Customers

Overview Debtor Control Ledger Loyalty Settings

samsu

Actions Add Customer Archive

<input type="checkbox"/>	First Name	Last Name	Mobile	Email	Available Credit
<input type="checkbox"/>	Samsung	WepaZim	0789456123	samsung@gmail.com	0.00

Customers: 1 to 1 of 1 < 1 > 10 / page

## Step 6

After confirmation publish settings to POS so that the customer can now appear on the POS application user interface.