

Customers

Customers

The **Customers** screen is your customer database — names, contact info, billing and shipping addresses. You can add a customer from this screen or directly from the cart, and you can attach any customer to a sale so it shows on their order history.

Open Customers

In the drawer, tap **Customers**. You get a searchable list with:

- Avatar
- Billing details (name, company, phone)
- Shipping address
- Email
- Date created / modified
- Row actions (edit)

Use the search bar at the top to find a customer by name, email, or phone.

Add a customer

Tap the + button at the top of the list to open the **Add Customer** dialog and fill in the fields (name, email, billing address, etc.). Save to add the customer to your database.

You can also add a customer **from the cart** when ringing up a sale: in the cart, tap **Add Customer** and choose to create a new one. That customer is added to your database **and** attached to the current sale in one step. See *Building the Cart → Attach a customer*.

Edit a customer

Tap the edit action in the row, or open the customer's detail view. Update any field and save.

Attach to a sale

When you're in the cart, tap **Add Customer** and pick the customer from the list. The sale and any receipt you email will be tied to them. Once attached, the customer's name and address show on the order detail and in their history.

Tips

- **Email receipts go to the attached customer.** If the customer's email is missing or wrong, the email step at checkout asks you for one.
- **One customer per sale.** To split a sale between two customers, ring them up as two separate orders.

Revision #1

Created 31 May 2026 16:33:57 by Luis Javier Rodriguez

Updated 31 May 2026 16:33:57 by Luis Javier Rodriguez