

POS Customer Display

Overview

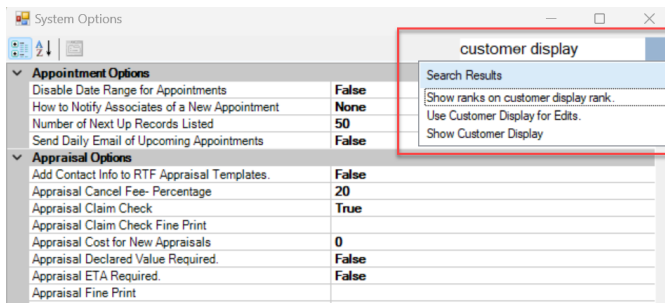
The **Customer Display** feature enables a new sidebar that appears on the right at POS. This sidebar provides all the information traditionally found within the **Customer Record**. In addition to a new interface, it also includes enhancements to make it simpler to work with **Customer Balances**, **Service Jobs**, and **more**.

Setup

The **Customer Display** is set to **OFF** by default. You must **enable** this feature by setting the **Show Customer Display** option to **True** in **System Options** to see the sidebar in POS.

To access System Options:

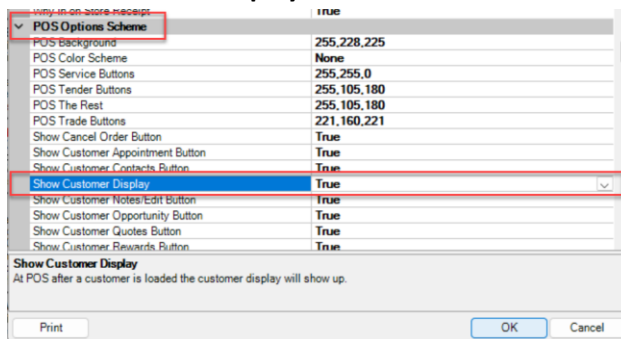
1. Navigate to **Administrative > System Options**.
2. To see all available options, use the **search bar** and search **Customer Display**



Available System Options:

- **POS Options Scheme:**

- **Show Customer Display:** Enables this feature. Set this to **True** to activate the side bar in POS.



- **Customer Options:**

- **Show ranks on Customer Display:** Activates the **Customer Rankings** feature which will rank customers based on transaction history. See the Customer Rankings page for more details.
- **Use Customer Display for Edits:** Use the new **Customer Display** when opening **Customer Records** outside of POS.

Using Customer Display

As mentioned, you must first **enable** this feature for use in POS. See the previous section on **System Options** for more information.

The screenshot shows the POS interface for Associate 1, Smith, Sam (1), and Customer #001.30912. The sidebar on the right is expanded, showing various icons for navigation. A red callout box points to the sidebar with the text: "Click any of the icons to expand the sidebar".


The screenshot shows the POS interface for Associate 1, Smith, Sam (1), and Customer #001.30912. The customer profile for Dominick Mastri is displayed. A red callout box points to the "Spouse / Partner" section with the text: "To make edits you must first unlock the section". Another red callout box points to the "General" tab in the sidebar with the text: "Click on the current tab to close the sidebar". A third red callout box points to the "Activity" icon in the sidebar with the text: "Jump to other tabs by clicking on their icon".











Method	Cell	Home	Home	Facebook
		Dominick	70 Colony St Seymour, CT 06483	https://www.facebook.com/ dominick.mastri.7









Item Count	Transaction Total	Transaction Avg	Service Total
8	\$23,375.00	\$783.74	\$500.00

Overall Rank	Merchandise Rank	Repair Rank	Transaction Rank
#35	#64	No Rank	#18



The **Balances** tab () includes several enhancements to make it easier to work **Layaways**, **Service Jobs**, and **Open Balances**.

	Balance Type ▼	Sale # ▼	Balance ▼	Date Created ▼	Most Recent ▼	Complete ▼	Descrip
  	Special Order	001-78578-001	\$475.00	10/18/2023	10/18/2023		      

	Make a payment.
	Pick up this transaction. Only shows if transaction can be picked up.
	Adjust the balance.
	View the full balance history including all deposits, payments, and refunds.
	View the initial intake receipt for this transaction.
	View the service job record.
	View the item record.
	Cancel this transaction.