

Heartland

Cash
Register
Express

Assigning Customer Account to an Invoice

Rev 01/2021

Table of Contents

Overview 1

Finding Customer via CRE Search 1

 Find 1

 Quick Find 2

Find Customer via Pinpad 3

Viewing Customer Sales History 5

Overview

Associating customers with invoices can be helpful in determining customer sales history. This document describes how to select a customer for an invoice.

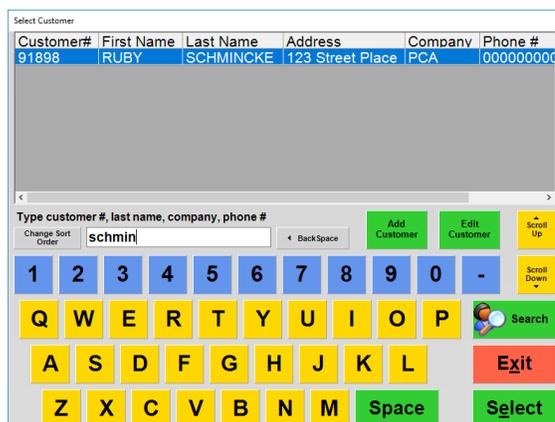


If you have questions regarding the processes described in this document, please contact Cash Register Express Support at 888.319.0521 or DAM@heartland.us.

Finding Customer via CRE Search

Find

- 1 To search by customer number, last name, company, or phone number, select **FIND**.
- 2 Enter search terms and select **Search**.



- 3 Highlight the desired customer from the list and click **Select**.

The selected customer's information will now display in the **Customer Info** box.

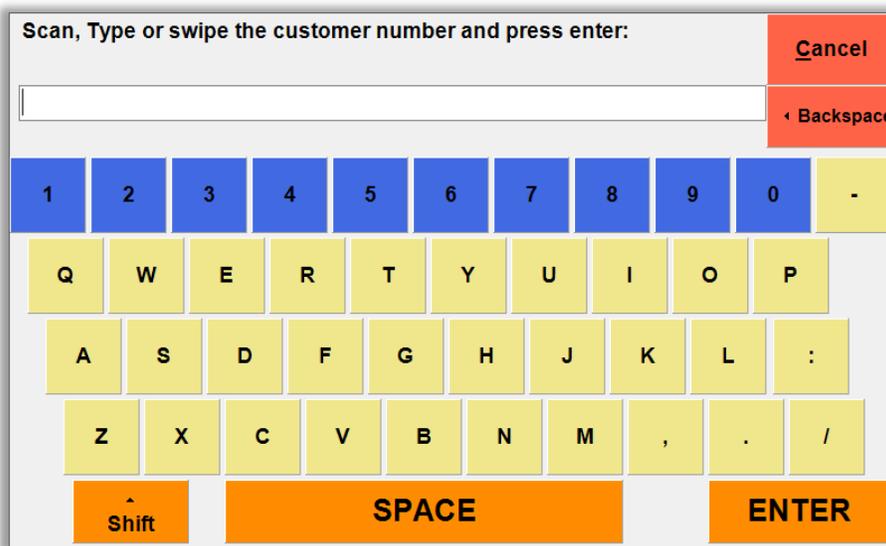


Quick Find

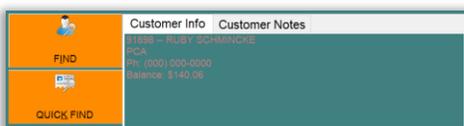
- 1 If you know the customer number, or the customer has a card to scan, you can find the customer by using the **QUICK FIND** option.



- 2 At the prompt, enter the customer number, or scan/swipe their card. and select **Enter**.



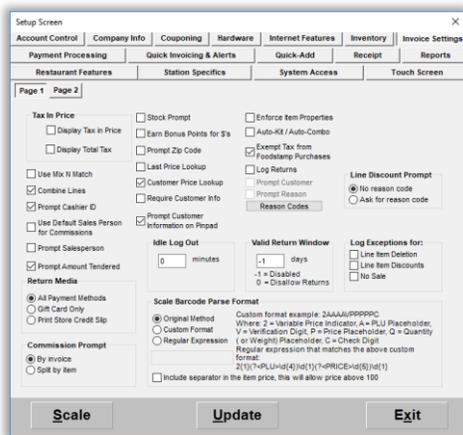
The associated customer’s information will now display in the **Customer Info** box.



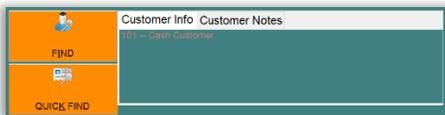
Please note: You can configure CRE so that the **QUICK FIND** option can also be used in conjunction with supported pinpads as described in the following section.

Find Customer via Pinpad

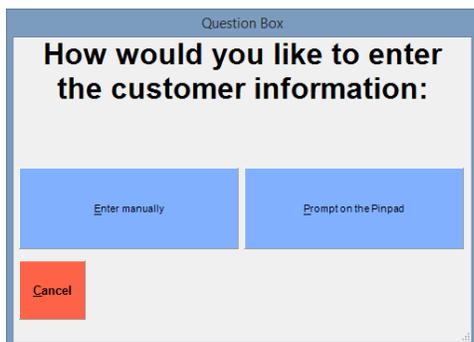
- Go to **Page 1** of the **Invoice Settings** tab of the setup screen and check the **Prompt Customer Information on Pinpad** option.



- At the invoice screen, select **QUICK FIND**.

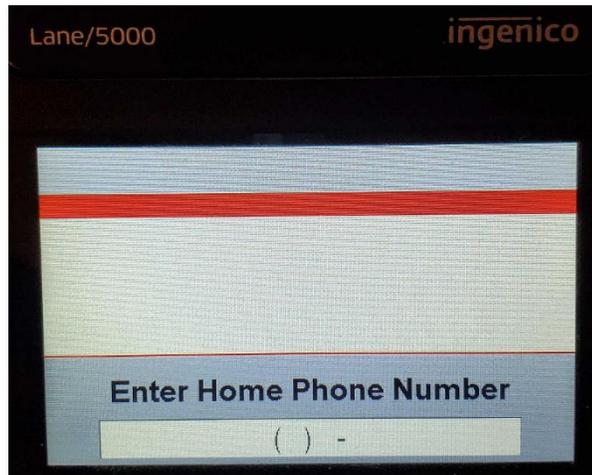
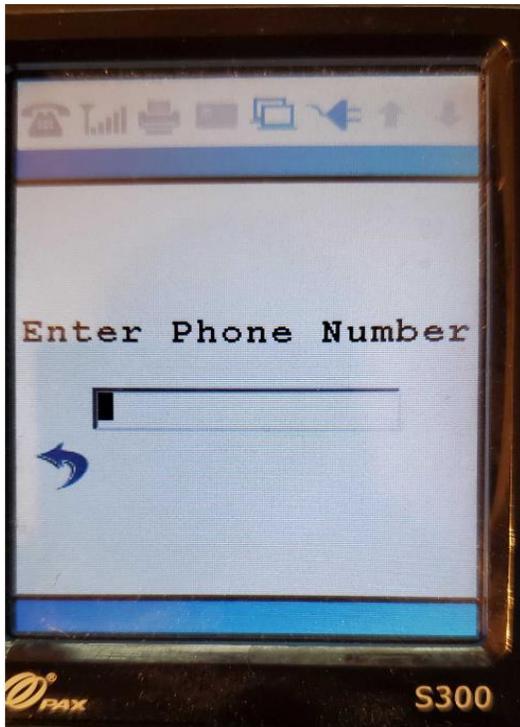


CRE will then ask if you wish to enter the information manually or prompt for entry on the pinpad.

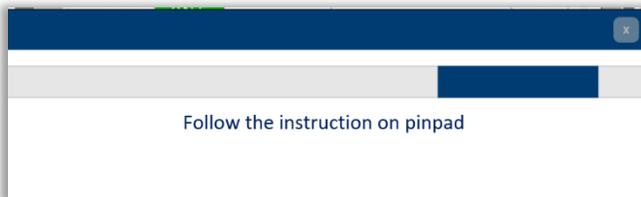


If you choose **Enter manually**, the **QUICK FIND** option will work as mentioned on page 2.

If you choose **Prompt on the Pinpad**, the customer can enter their details on the pinpad as shown below:



As the customer enters their information, CRE displays the message shown below:



CRE will then search the database for a customer account with a matching phone number or customer ID, and will assign it to the current invoice.

Please note that this feature is available only with supported pinpads. These include:

- ▶ PAX A920
- ▶ PAX S300
- ▶ PAX PX7
- ▶ Verifone VX805
- ▶ Datacap Ingenico Lane 5000
- ▶ Datacap Ingenico Move 5000

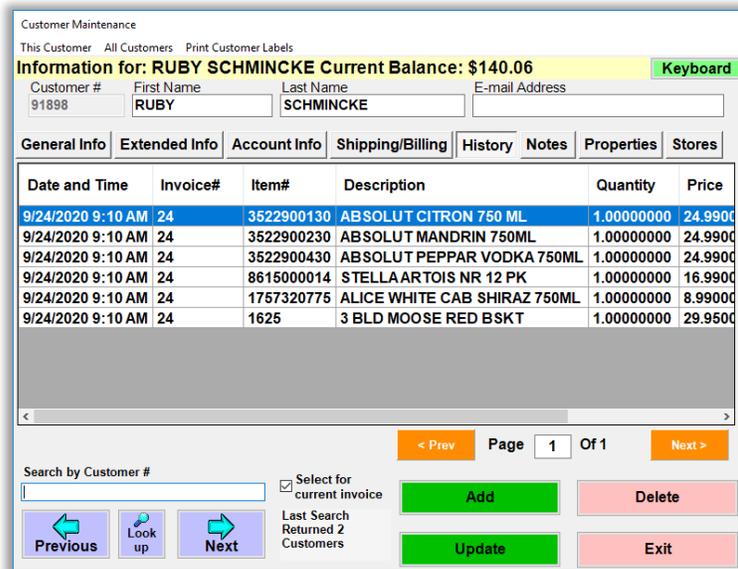
Viewing Customer Sales History

1 Select **Administrative**, then **Customer Maintenance**.



2 Select the **History** tab.

3 You will see a list of every item the customer has purchased when they were associated with an invoice.



You can also view a condensed Open Invoice Summary report. This provides a quick and easy way to see what customers purchased without the need for merchants to go in depth in their files. It also reduces the amount of paper and ink/toner consumption, as well as wear and tear on printers.

- 1 To use this feature, go to Customer Maintenance and select a customer with open invoices.

Customer Maintenance
This Customer All Customers Print Customer Labels

Information for: RUBY SCHMINCKE Current Balance: \$140.06 Keyboard

Customer # 91898 First Name RUBY Last Name SCHMINCKE E-mail Address

General Info | **Extended Info** | Account Info | Shipping/Billing | History | Notes | Properties | Stores

Account Type: Standard Layaway
 Open Account Date: 9/24/2020
 Close Account Date:
 Balance Due: \$140.06
 Detailed Account Info

Default Salesperson: 100101
 Membership Expiration:

Attn:

Credit Limit: Max Balance \$1,000.00
 Restrict spending to \$1,000.00 over 2 days starting
 Require PO # Entry

Authorized Members:

Search by Customer # Select for current invoice
 Last Search Returned 2 Customers

- 2 Go to the Account Info tab and select Detailed Account Info.

Account Details Keyboard

Invoices | Payments

All Invoices Open Invoices Paid Invoices

Invoice #	Store ID	Date/Time	Total	OA Amt	AmtDue	Amt Applied
24	1001	9/24/2020 9:10 AM	\$140.06	\$140.06	\$140.06	\$0.00

91898 PL: A RUBY SCHMINCKE PCA 123 Street Place

Balance Due: **\$140.06** Due Date:

Select Transaction Type: Standard Payment Select Inv #: Oldest Pay By: Cash Amount: \$0.00

Payment...Thank You!

- 3 On the screen that opens, select Open Invoice and then select starting and ending dates when prompted.

Here is a sample Open Invoice Summary report:

Customer Name: Cust1210First--Cust1210Last					
Customer Number: 1210					
01/15/2021--01/22/2021					
Invoice #: 166 01/15/2021 11:16:45 AM Cashier/server: 100101					
line #	quantity	item #	item description	price	
1	1.00	0005	ti0005	2.99	
2	1.00	1017	ti1017	2.43	
3	1.00	1017	ti1017	2.43	
4	1.00	1017	ti1017	2.43	
5	1.00	1017	ti1017	2.43	
6	1.00	1017	ti1017	2.43	
7	1.00	1017	ti1017	2.43	
8	1.00	1121	ti1121	5.00	
				Total Tax	\$0.74
				Grand Total	\$23.31
Invoice #: 167 01/15/2021 11:19:15 AM Cashier/server: 100101					
line #	quantity	item #	item description	price	
1	1.00	047495013054	Fig	7.33	
2	1.00	047495013054	Fig	7.33	
3	1.00	047495013054	Fig	7.34	
				Total Tax	\$0.73
				Grand Total	\$22.73
Invoice #: 168 01/15/2021 11:20:16 AM Cashier/server: 100101					
line #	quantity	item #	item description	price	
1	1.00	1164_3	KitComboMeal	10.00	
2	1.00	1164_1	Kititem1	0.00	
3	1.00	1164_1	Kititem2	0.00	
4	1.00	1164_2	Kititem3	0.00	
				Total Tax	\$0.33
				Grand Total	\$10.33