Heartland | Cash Register Express

Assigning Customer Account to an Invoice

Rev 01/2021

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Overview

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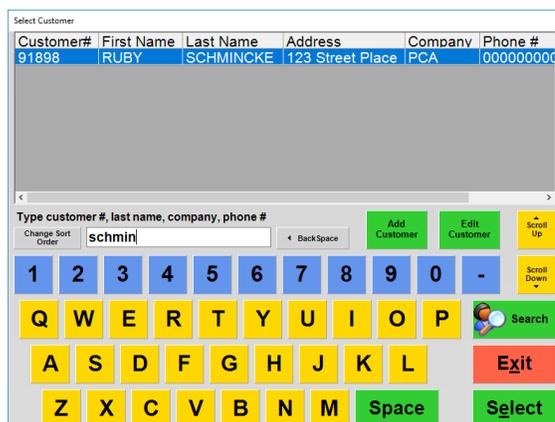

If you have questions regarding the processes described in this document, please contact Cash Register Express Support at 888.319.0521 or DAM@heartland.us.

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.
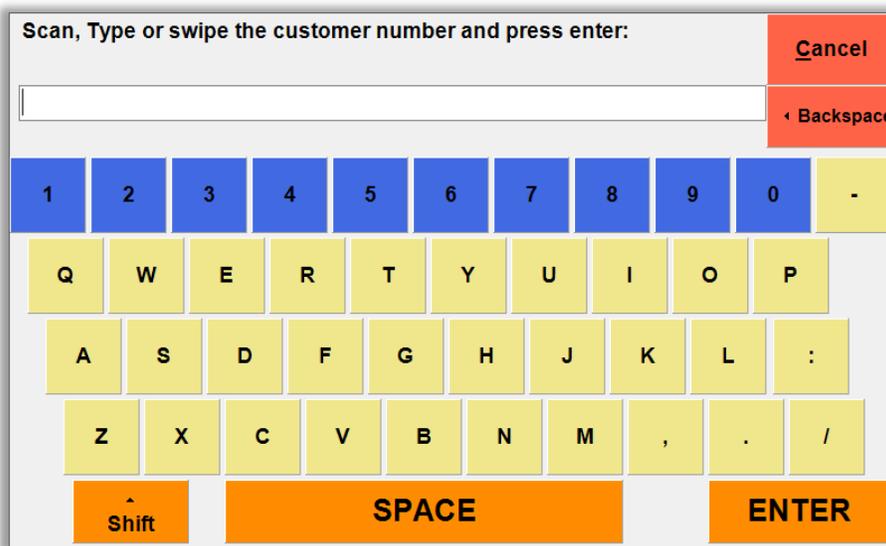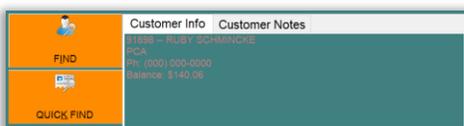
Quick Find

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.
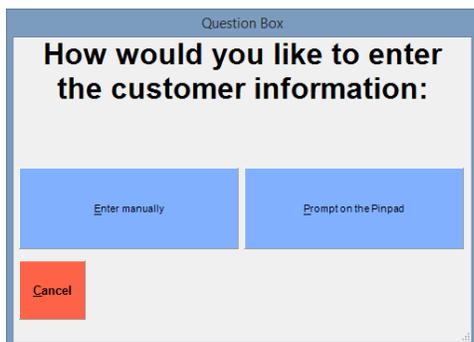
Find Customer via Pinpad

3 Go to **Page 1** of the **Invoice Settings** tab of the setup screen and check the **Prompt Customer Information on Pinpad** option.
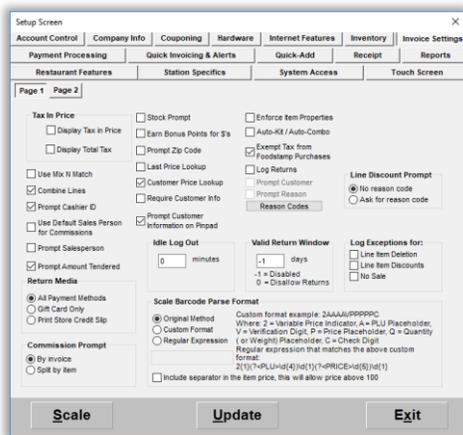
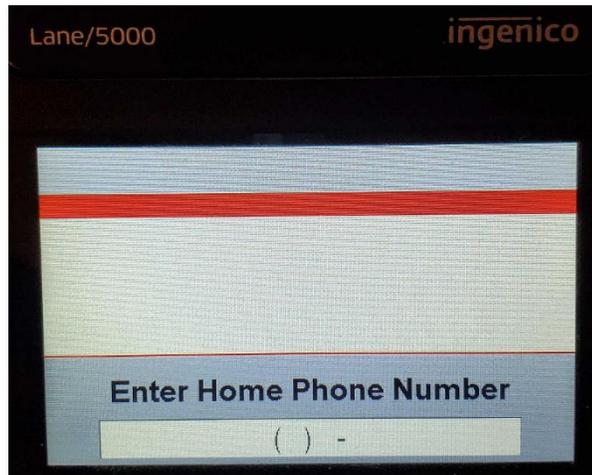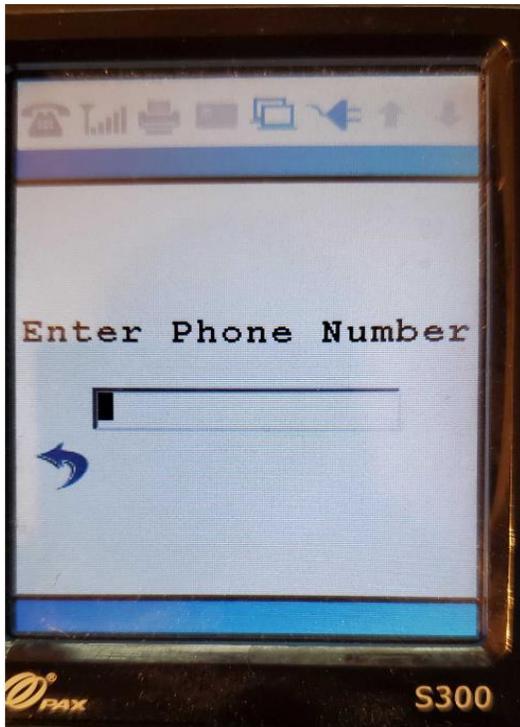**4** At the invoice screen, select **QUICK FIND**.
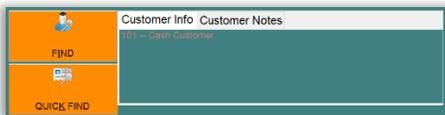
CRE will then ask if you wish to enter the information manually or prompt for entry on the pinpad.
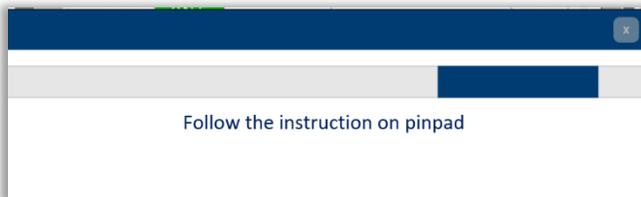

If you choose **Enter manually**, the **QUICK FIND** option will work as mentioned on page 2.

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

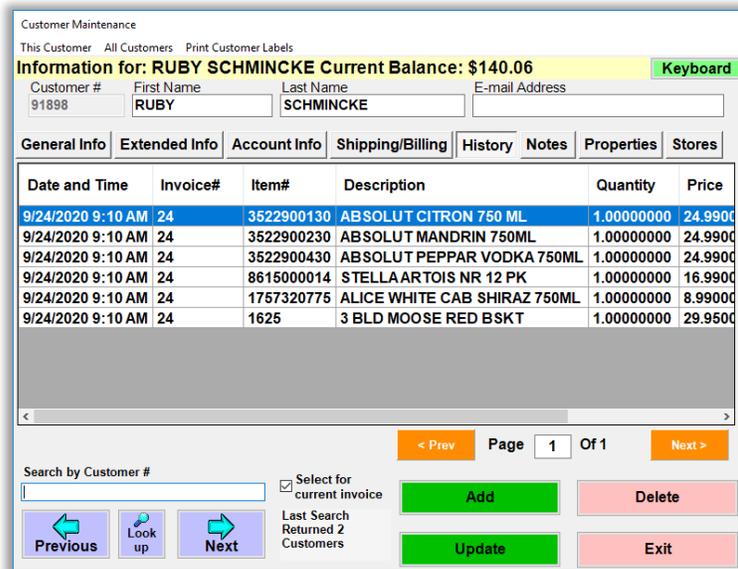# Viewing Customer Sales History

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.

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

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		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