



Maintain Wholesale Customer Contacts

Description

Use this task to update wholesale customer contacts in the Wholesale Terminal.


Trigger

Perform this task when there is a need to edit a customer's contacts.

Prerequisites

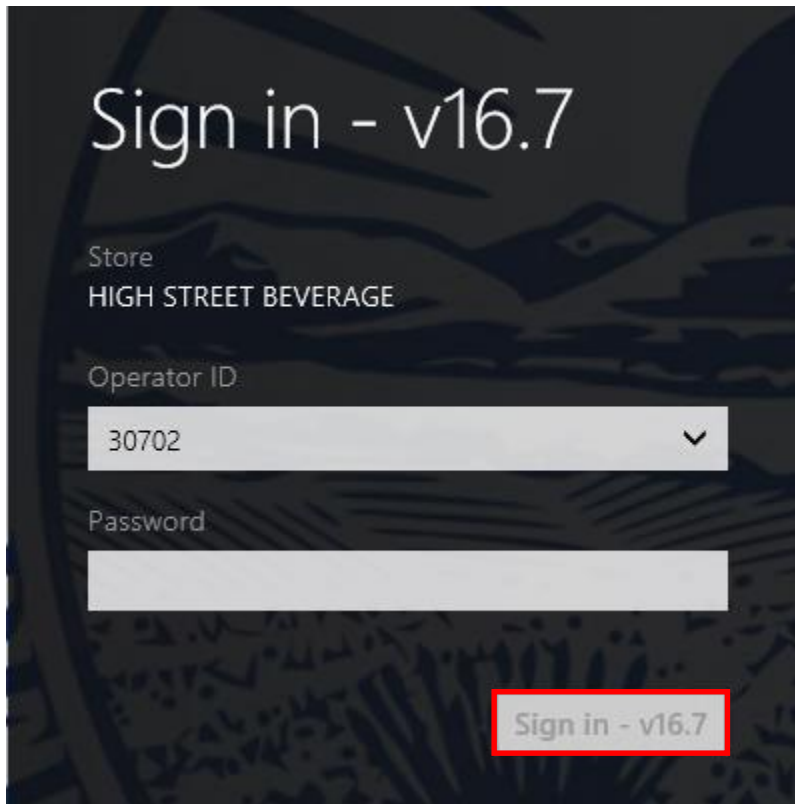
Customer exists in the system.

Helpful Hints

- The following fields can be updated for a wholesale customer:
 - Receipt email address
 - Contact name
 - Known as
 - Phone number
- All actions performed in this job aid can be done using the keyboard and mouse.
Examples:
 - Press  on Numpad
 - Press the **Enter** key on your keyboard

Procedure

1. Begin this task by signing into the Wholesale Terminal.



Sign in - v16.7

Store
HIGH STREET BEVERAGE


Operator ID

30702

Password

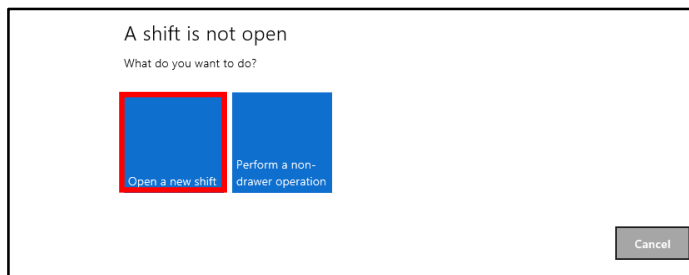
Sign in - v16.7

The image shows a sign-in screen for version v16.7. It includes a store name 'HIGH STREET BEVERAGE', an operator ID dropdown menu with '30702' selected, and a password field. A red box highlights the 'Sign in - v16.7' button at the bottom right.

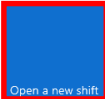

2. Press  to start the shift.



The *Open shift* window will only display if the shift is not already opened.



A shift is not open
What do you want to do?

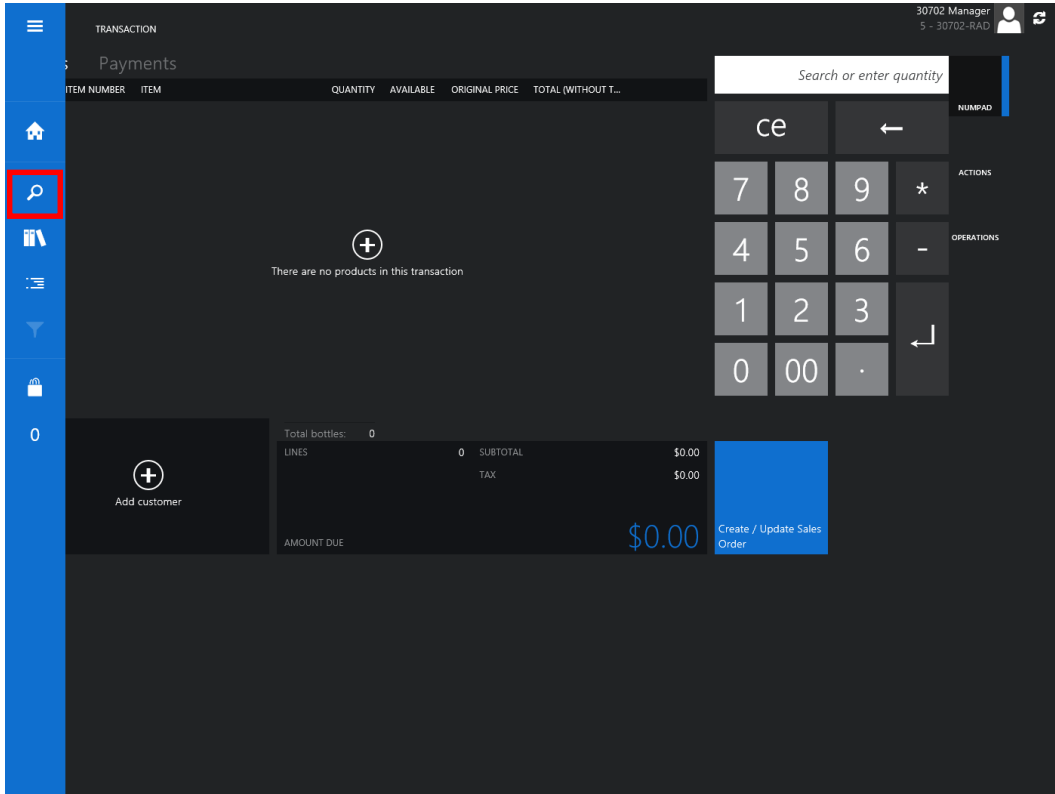
 

Open a new shift Perform a non-drawer operation

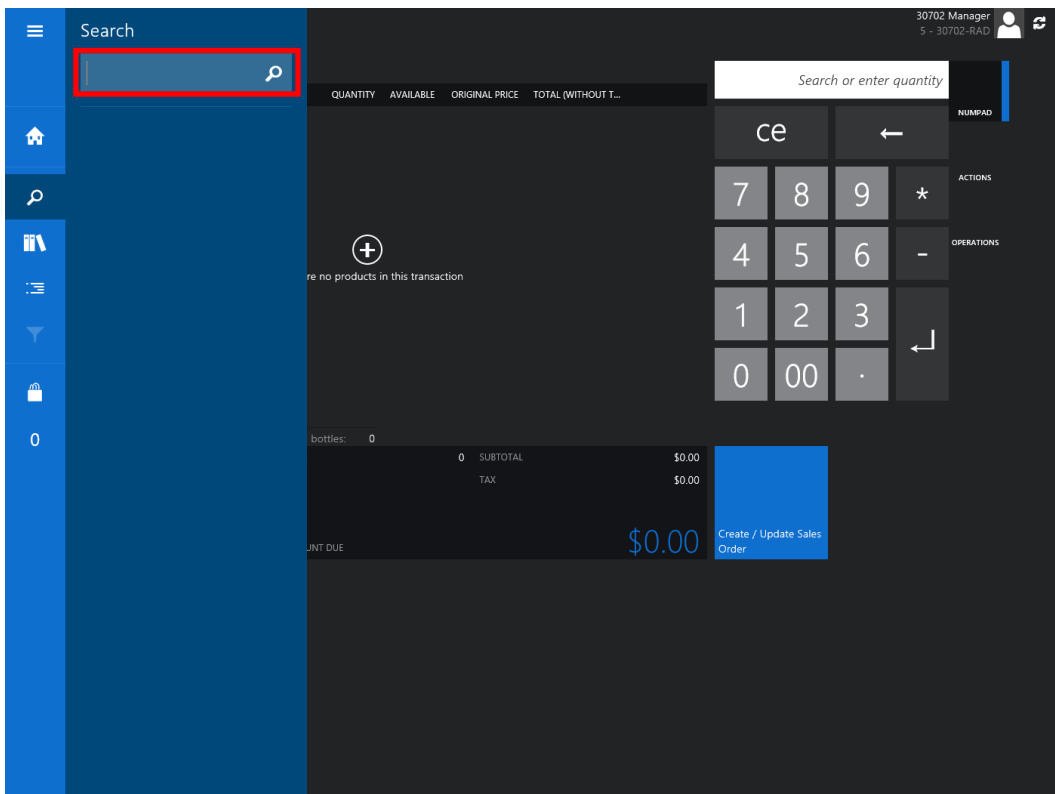
Cancel

The image shows a dialog box titled 'A shift is not open' with the question 'What do you want to do?'. It contains two buttons: 'Open a new shift' (highlighted with a red box) and 'Perform a non-drawer operation'. A 'Cancel' button is located at the bottom right.

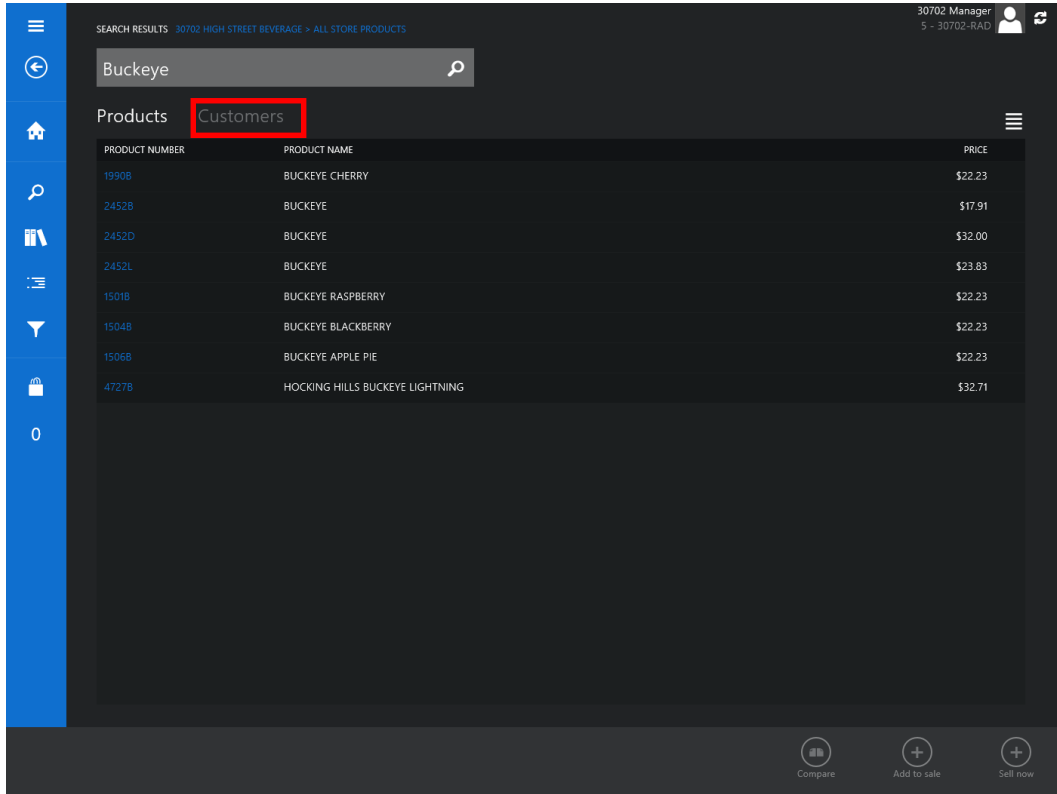
3. Press  to display the **Search** field.



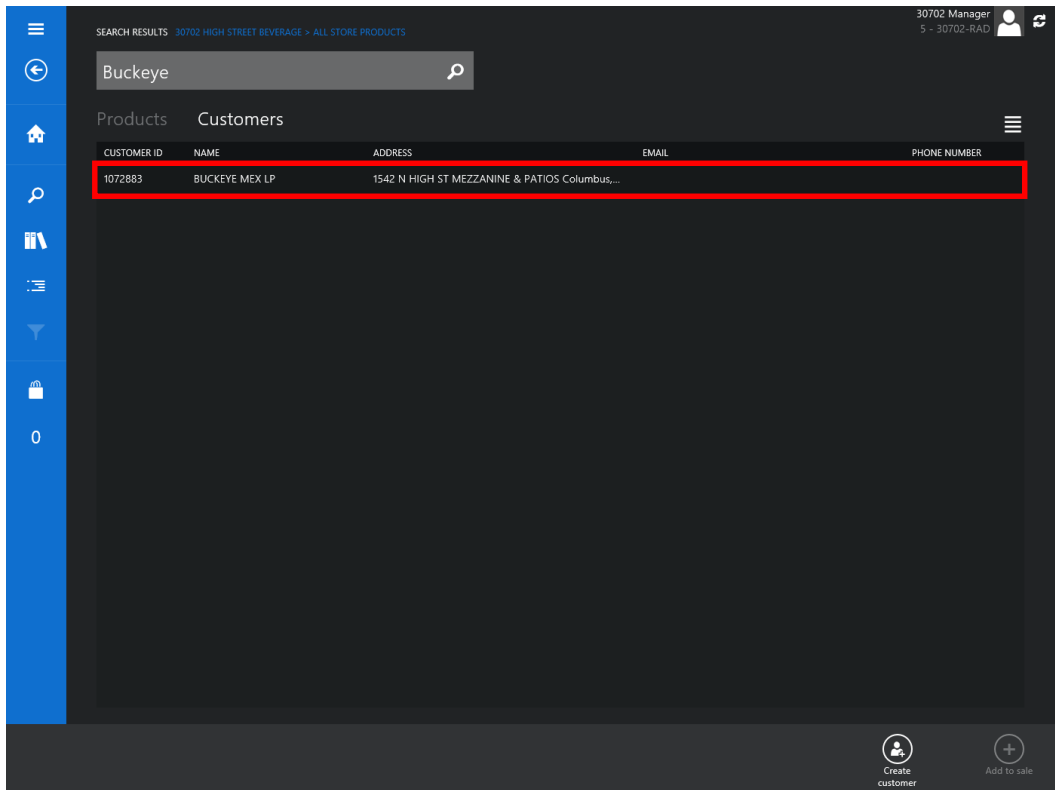
4. Enter the appropriate customer in the **Search** field and press . In this example, enter "Buckeye."




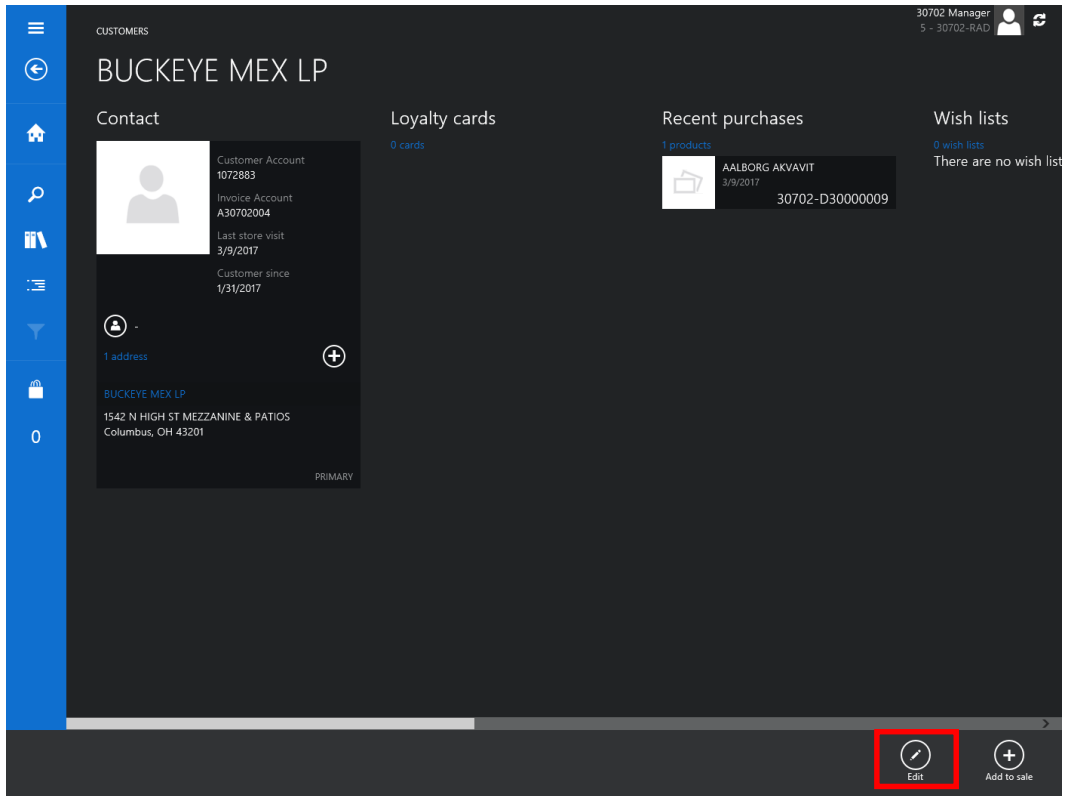
5. Press **Customers** to display the customers list.



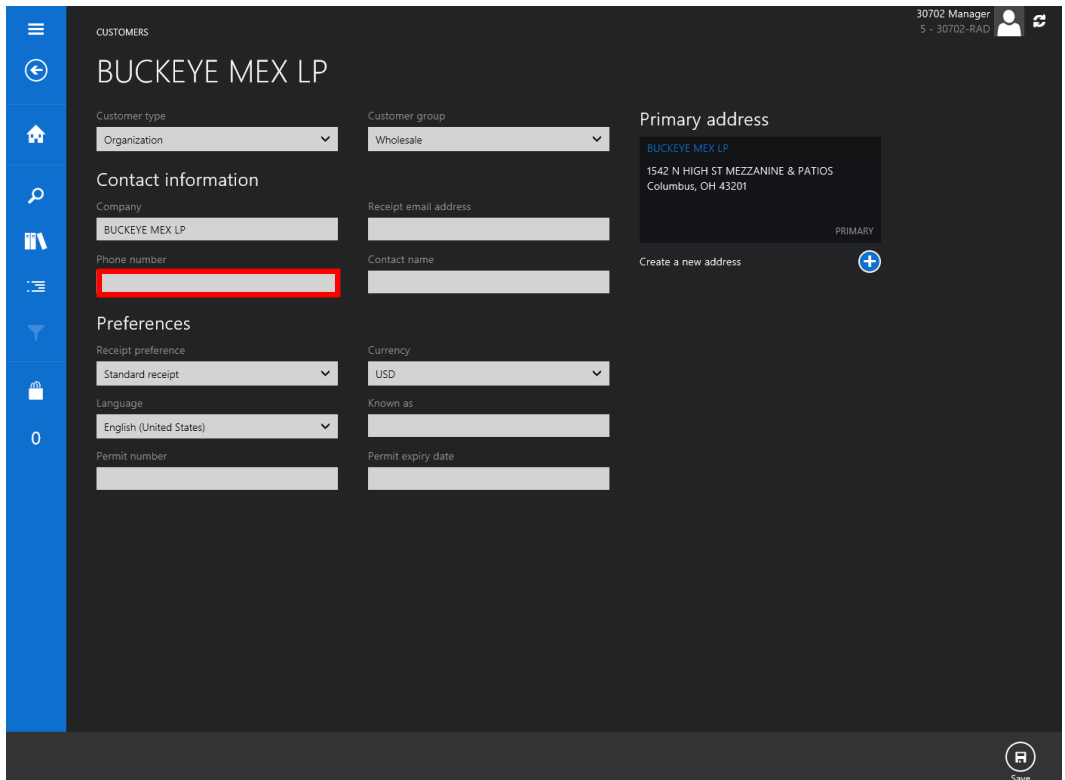
6. Select the appropriate customer to edit. In this example, select "BUCKEYE MEX LP."



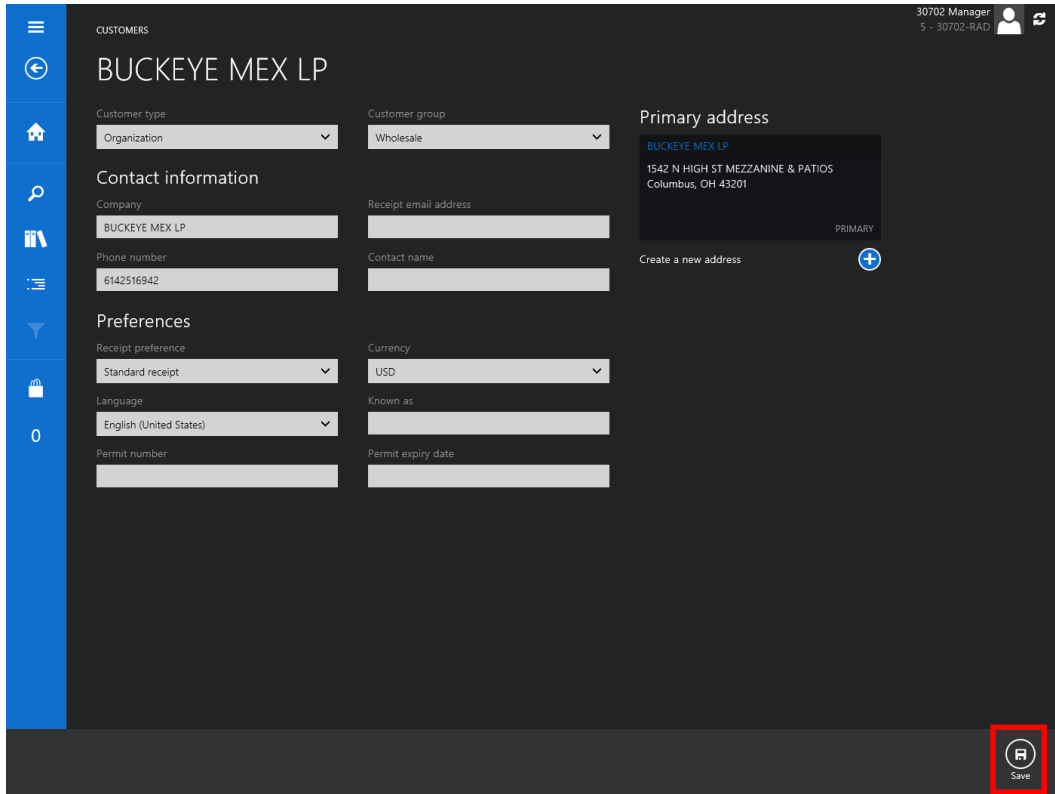
7. Press  to edit the customer contact information.



8. Update the necessary fields. In this example, enter a phone number "6142516942."



9. Press  to save any edits.



The screenshot shows a customer profile page for 'BUCKEYE MEX LP'. The page is divided into several sections: 'Customer type' (Organization), 'Customer group' (Wholesale), 'Primary address' (1542 N HIGH ST MEZZANINE & PATIOS, Columbus, OH 43201), 'Contact information' (Company: BUCKEYE MEX LP, Phone number: 6142516942), and 'Preferences' (Receipt preference: Standard receipt, Currency: USD, Language: English (United States)). A 'Save' button is located in the bottom right corner, highlighted with a red box.

Results

You have updated wholesale customer information.