

## GETTING STARTED WITH RUND00 · UNBOXING

# Adding a Customer

Every ticket starts with who's at the counter. It all happens on the left panel of the transaction screen.

## THREE WAYS AT THE COUNTER

1

## Pull up a regular

They're already in the system.

Search by name, phone, or email → click

2

## Create on the fly

New customer, no leaving the sale.

Create account → phone + name → Save

3

## Walk-in

Cash-and-go, no paper trail.

Click the × to clear, ring it up

### Create a new customer

- 1 Click **Create account** on the left panel.
- 2 Enter a **Phone** number and a **Name**.
- 3 Set the **Pricing tier** if they're a contractor.
- 4 Click **Save**. They drop onto the ticket.

### The form, in short

#### Phone + Name

The only fields that matter. Pricing tier defaults to **Tier 2 - Retail**. Email and address are optional.

**Duplicate phone = silent fail.** If that number is already on an account, Save just closes the form with no error and no new customer. Search the list for the phone first if you're unsure.

**Want them on a tab?** Adding the customer comes first. Setting them up to charge on account is its own quick walkthrough, Open a House Account.