

Creating Customers

Customer can create themselves by placing orders on your Shopify website and by accessing the customer portal and creating an account but you can also create your own customers! You can do this in multiple spots for easy access

You can Go to Customer > Create Customer

Customers Search customer names, emails, nicknames, Create Customer

Sales **Spend \$** Store Credit Today 7d 30d 60d 90d

Spend \$ by customer

No customer sales in this period yet.

NAME	NICKNAME	EMAIL	PHONE	STORE CREDIT	NOTES	CREATED
> Craig Southeren	-	craig@southeren.com	-	Available: \$107.64	-	04/11/2025
> Craig Southeren	-	craigs@postincrement.com	-	-	-	06/12/2025
> Mark Eisenhuth	-	mark-democus@scrypos.com	-	Available: \$15.00	-	23/07/2026

Showing 1 to 3 of 3 results Show: 50 per page

While processing a POS transaction you can go "Click to select customer" "Create Customer"

When creating a buy/sell list on behalf of a customer you can create the customer as you are creating the list

Front Desk

Float

Parked (8)

Customer:

Click to select customer

Buy

Transactions

Sale Total

Park

Disc \$

Clear

Notes

Disc %

1

★

Showing 1 to 6 of 6 products



Abs



Ade



Select Customer

Search by name, email, phone, or nickname...

NAME	EMAIL	PHONE	STORE CREDIT
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Enter a name, email, phone number, or nickname to search.

No Customer

Create Customer

Cancel

Customers can be created with the core fields or name, email and phone number but you can also

- * Give your customers nicknames
- * Add internal notes about the customer
- * Set or Change their customer dashboard password to assist with password resets (they can do this on the dashboard login screen too)

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▼ Mark Eisenhuth	-	mark-democus@scrypos.com	-	Available: \$15.00	-	23/07/2026

Customer Details

Name *

Mark Eisenhuth

Email

mark-democus@scrypos.com

Phone Number

+61 400 123 4567

Nickname

Customer nickname

Notes

Additional notes about the customer

Password

Leave empty to keep current password

Enter a new password to change it. Leave empty to keep the current password.

Save Changes

Delete Customer

Showing 1 to 3 of 3 results

Show: 50 per page

Customers can have store credit. Usually this is added through buy/sell lists but this can be added manually by clicking "change" next to their store credit on their customer record

You can adjust or overwrite their credit or you can set it to a specific amount and record a note for you and the customer that says why an adjustment occurred (Customers can see this in their customer dashboard)

Change store credit - Mark Eisenhuth

Current store credit
\$15.00 AUD

Change type
☐ Set to ☒ Adjust by

Adjustment amount
\$ AUD

Notes for ledger entry (optional)

You can also view the full Store Credit History by clicking on the icon next to change

Mark Eisenhuth - mark-democus@scrypos.com - Available: \$15.00 

Customer Details

Name * Email

Phone Number Nickname

Notes

Store Credit History - Mark Eisenhuth

DATE	SOURCE	AMOUNT	BALANCE AFTER	NOTES	REFERENCE
23/07/2026, 09:54:52	Manual Adjustment	+\$15.00	\$15.00	Initial store credit - Mark ScryDemo	-

Note: You can view your current store credit liability using the report at the top of the customers page which will show you your total liability and top percentile of credit holders.

Customers

Search customer names, emails, nicknames, [Create Customer](#)

SalesSpend \$Store Credit

Store Credit by customer

\$122.64

Craig Southeren \$107.64 (87.8%)

Mark Eisenhuth \$15.00 (12.2%)

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>	Mark Eisenhuth	-	mark-democus@scrypos.com	-	Available: \$15.00		23/07/2026

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