Adding/Editing Accounts

Requirements

Steps:

- Log in to your BrewPOS Admin Back Office ٠
- Go to the More tab
- Go to the Accounts tab
- To edit an existing account balances double click on the • account, To add a new account click on the *New* icon in the toolbar

These accounts are also the customer records you see in the POS front of house

- Active button will make the account active
- Choose Trade Account by double clicking on the Underlined Text.



💕 Customer						
Customer ID	4449					
Name	RobertCena		Favorite Product	(none)		×
Nickname	Bobby		Regulars Club	no		×
Address			Keg Club	no		×
City, State, Zip			Trade Account	balance 23	5.00	×
Email			Gift Card	no		×
Phone			Notes			
Primary Location	ALBUQUERQUE		•			
Employee	-		 Last Visit	12/21/17		
Active			Customer Since	12/21/17		
			Total Value	175.44		
Delivery charge	0.00		90 Days	0.00		
History Deposit	s Comps Overr	ides Cancel	s Voids			
🐚 🥋 🖾						
Ticket Dat		Loc	Employee	Total	Notes	
	21/2017 11:58 AM 21/2017 11:54 AM	Santa Fe Santa Fe	Gillian Brown Gillian Brown	40.00 135.44		
Total	1,2017 11.317 4	oundre		175.44		
					_	
I4 4 ▶ ▶1 27	of 33				Save	Cancel

- Beginning Amount Sets your starting balance
- Remaining is the amount left, also allows you to ٠ adjust the remaining manually
- Allow negative, this allows an account to be used ٠ past a 0 balance
- Add monthly automatically adds a balance equal ٠ to the amount on the first of the month

🕑 Tra	de Account							×
Beg Ren Allo	tomer iinning Amour naining w Negative E I monthly		nt 0.00 235.00 0.00					
	تا چ							
Da 12,	ite (21/17	Loc Santa Fe	Workstation PONDER	Amount 135.44	Employee Gillian Brown			
						Save	Cance	el

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Front Of House Account Management

• Open an account with a customer record or add a customer record to an open ticket.

Checking balance

Once a customer record is on a ticket, you can touch the customer name to check the account balance.



∭Brew <i>POS_</i> 10:16 AM	Colt				X Login
Customer name	Robert Cena	Club Membe	r exp	ires 10/15/19)
Nickname (optional)	Bobby	Trade Accou	nt bala	ince 235.00	
Email		Gift Card	no		
Phone					
🤎 Fav Prod	(none)	🗙 Employe	e		
		Active			
		Cust Since	12/21/17	Total	175.44
		Last Visit	12/21/17	90 days	0.00

Paying with Account

Once a customer record is on a ticket, you can chose the other payment a tab and select trade account



Amount			10.80		🗙 Walkout
1	2	3	с	ſ	Trade Asst
4	5	6	×	L	分 Trade Acct
7	8	9			
()		L4		
Che	ck Pu	b Money			×