Instructions for Customer Names in VEND

This document is intended to assist the each county office to record customer names in VEND.

**Overview/key pieces of information:**

* Customer names are helpful when trying to find a transaction which has been entered into VEND.
* Using customer names allows us to find transactions that a customer has paid using a click of a report.
* There can only be one customer name per transaction that can be searched using reports.
* For 4H Youth Exploration Days, the customer name is the youth attending the event.

**Each transaction in VEND needs to have a customer name associated with the sale regardless of what product the customer is purchasing or how the customer is paying.**

**How to add a customer name to a sale in progress?**

To create a new customer from the sell screen, type the customer's name into the 'Customer' field. When this name is not recognized by Vend, a window will pop up saying 'Customer not found. Create a new customer'? Clicking 'OK' will take you through to the New Customer screen.

**Using the iPad & Desktop Computer**

* The customer field is identified with a person icon and statement “Add a customer” above the products added in the shopping cart.
	+ IF the customer already exists in the system, click that field and start typing the customer name. Scroll until you find the correct one.
	+ If the customer does not exist in the system, click the “add a new customer” link to open the customer entry field.
* Details to enter: First Name, Last Name, Company name (if it applies) and phone number.
* If a customer asks why we collect this info, you can explain that this is helpful in the event we need to reach out to a customer for problems related to their payment or item purchased. We will never contact them otherwise.

**How to add a customer name to a sale which has already been completed?**

Since the sale is already completed in VEND, **first,** you’ll need to ensure that the customer exists in VEND before it can be added to the receipt.

* To find if the customer exists in VEND, search the name using the “Customer Field” from the home screen on the iPad or Desktop Version. If you can’t find them using the search function, they’ll need to be added in VEND.
* Click “**Add Customer**” Then enter the customer details: First Name, Last Name, Company name (if it applies) and phone number.
	+ If a customer asks why we collect this info, you can explain that this is helpful in the event we need to reach out to a customer for problems related to their payment or item purchased. We will never contact them otherwise.

Once the customer name is entered in VEND, you are ready to add the customer name to the receipt.

1. From the home screen, click the blue icon “Sales Ledger”.
2. Search for the sale that you need to add a customer to
3. Click the **date on the sale** to expand the sale
4. Click **Edit Sale**
5. Search for the customer in the **Customer field**
6. Click **Save**

**How to edit Customer information which is already created**

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**Contact** **msue.vend@msu.edu** **with any questions related to this topic.**