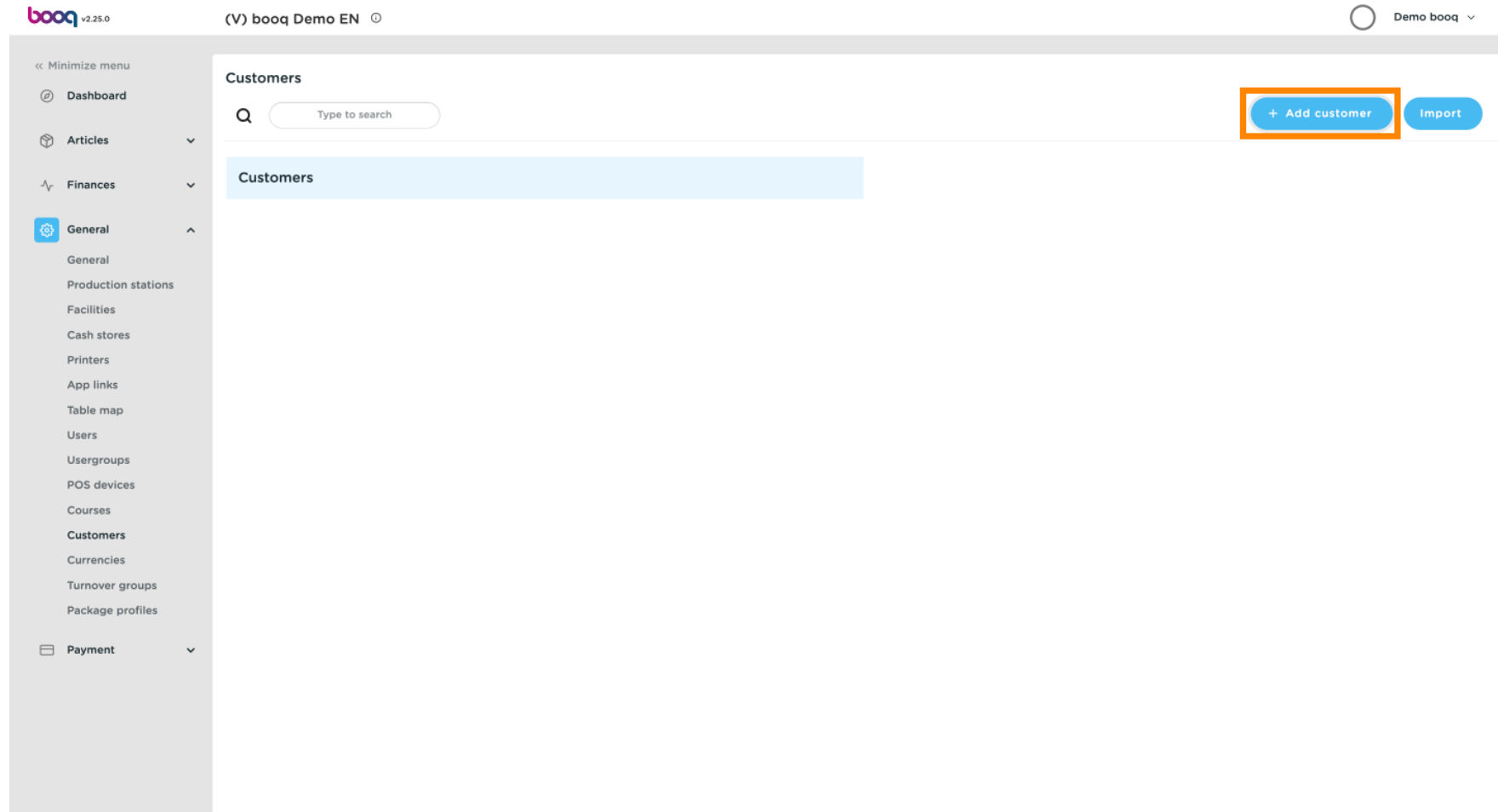




Open the platform and click **+ Add customer**.



 Click on the **text field** next to Name* and add your Customers name.

booq v2.25.0

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Add Customer

Customer

Address

Customer

CLOSE

Name*

David

Parent

None

Is person

Personal information

User ID

Invoice currency

Invoice credit limit

Invoice credit allowed

Payer

Price level

References

Search key

Locale

Card ID

Active

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

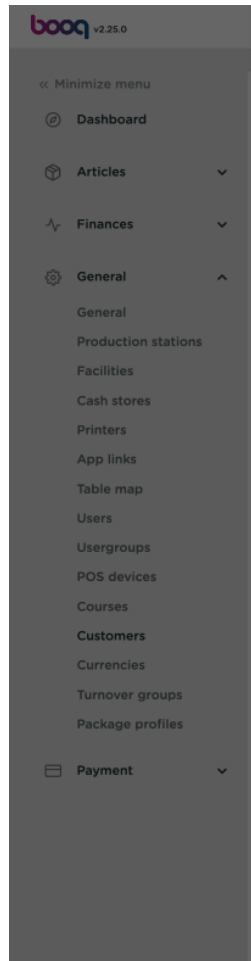
ID

Save and add new

Save



Click on **None**, to add it to existing Parent.



Add Customer

Customer

✉ Address

Customer

CLOSE

Name*

David

Parent

None

Is person

Personal information

User ID

Invoice currency

None

Invoice credit limit

0.00

Invoice credit allowed

Payer

None

Price level

None

References

Search key

Locale

None

Card ID

Active

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save



Tick the following **box**, if the Customer is a person.

booq v2.25.0

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Add Customer

Customer

Address

Customer

CLOSE

Name*

David

Parent

None

☒ is person

Personal information

User ID

Invoice currency

None

Invoice credit limit

0.00

☐ Invoice credit allowed

Payer

None

Price level

None

References

Search key

Locale

None

Card ID

☐ Active

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save

 Click on the **text field** next to User ID and add the Customers User ID.

booq v2.25.0

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Add Customer

Customer

Address

Customer

CLOSE

Name* David

Parent None

Is person

Personal information

User ID 7777

Invoice currency None

Invoice credit limit 0.00

Invoice credit allowed

Payer None

Price level None

References

Search key

Locale None

Card ID

Active

Person information

First name

Last name

Surname prefix

Gender None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save



Click on **None**.

booq v2.25.0

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- Payment

Add Customer

Customer

✉ Address

CLOSE

Name*

David

Parent

None

Is person

☒

Personal information

User ID

7777

Invoice currency

None

Invoice credit limit

0.00

☐ Invoice credit allowed

Payer

None

Price level

None

References

Search key

Locale

None

Card ID

☐ Active

Person information

First name

Last name

Surname prefix

Gender

None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save

 Select the **currency** for the invoice. In our case, we chose **EURO**.

booq v2.25.0

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Payment

Add Customer

Customer

Address

Customer

CLOSE

Name* David

Parent None

Is person

Personal information

User ID 7777

Invoice currency EURO

Invoice credit limit

Payer

Price level None

References

Search key

Locale None

Card ID

Active

Person information

First name

Last name

Surname prefix

Gender None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save



Click on the **text field** next to Invoice credit limit and type the Customers credit limit.

booq v2.25.0

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Payment

Add Customer

Customer

Address

Customer

CLOSE

Name* David Parent None Is person

Personal information

User ID 7777

Invoice currency EURO

Invoice credit limit 2000.00

Invoice credit allowed

Payer None

Price level None

References

Search key

Locale None

Card ID

Active

Person information

First name

Last name

Surname prefix

Gender None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save



If Invoice credit is allowed tick the following **box**. **Note: if the box is blue, it means the selection has been activated.**

booq v2.25.0

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Payment

Add Customer

Customer

Address

Customer

NAME*

David

PARENT

None

Is person

☒

Personal information

User ID

7777

Invoice currency

EURO

Invoice credit limit

2000.00

☒ Invoice credit allowed

Payer

None

Price level

None

References

Search key

Locale

None

Card ID

☐ Active

Person information

First name

Last name

Surname prefix

Gender

None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

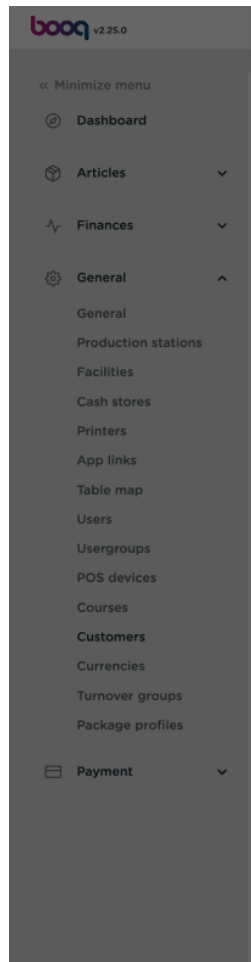
ID

Save and add new

Save



Click on **None** and add the Payer.



Add Customer

Customer

Address

Customer

CLOSE

Name*

David

Parent

None

Is person

Personal information

User ID

7777

Invoice currency

EURO

Invoice credit limit

2000.00

Invoice credit allowed

☒

Payer

None

Price level

None

References

Search key

Locale

None

Card ID

Active

☐

Person information

First name

Last name

Surname prefix

Gender

None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

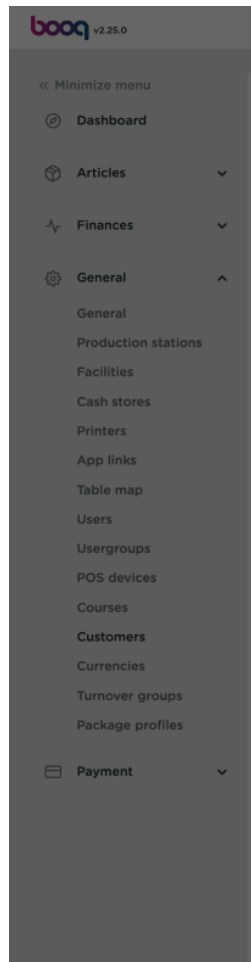
ID

Save and add new

Save



Choose between **None** or another **price level** you added.



Add Customer

Customer

Address

Customer

CLOSE

Name*

David

Parent

None

Is person

Personal information

User ID

7777

Invoice currency

EURO

Invoice credit limit

2000.00

Invoice credit allowed

☒

Payer

None

Price level

None

References

Search key

Locale

None

Card ID

Active

☐

Person information

First name

Last name

Surname prefix

Gender

None

Contact information

Description

Email address

Site url

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+ Add phone number

Identification

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ID

Save and add new

Save



Choose between **None** or a other price line you did add

booq v2.25.0

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- Payment

Add Customer

Customer

✉ Address

Customer CLOSE

Name* David Parent None Is person

Personal information

User ID7777

Invoice currencyEURO

Invoice credit limit2000.00

☒ Invoice credit allowed

PayerNone

Price level

None

✓ None

Happy Hour

References

Search key

LocaleNone

Card ID

☐ Active

Person information

First name

Last name

Surname prefix

GenderNone

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save

 Click on the **text field** next to Search key and type in the Search Key.

booq v2.25.0

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Payment

Add Customer

Customer

Address

Customer

CLOSE

Name* David

Parent None

Is person

Personal information

User ID 7777

Invoice currency EURO

Invoice credit limit 2000.00

Invoice credit allowed

Payer None

Price level None

References

Search key

Locale None

Card ID

Active

Person information

First name

Last name

Surname prefix

Gender None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save



Click on **None** to add the Location.

booq v2.25.0

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Payment

Add Customer

Customer

Address

Customer

CLOSE

Name* David

Parent None

Is person

Personal information

User ID 7777

Invoice currency EURO

Invoice credit limit 2000.00

Invoice credit allowed

Payer None

Price level None

References

Search key

Locale None

Card ID

Active

Person information

First name

Last name

Surname prefix

Gender None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save



Select the county. In our case we selected DE.

booq v2.25.0

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Payment

Add Customer

Customer

Address

Customer

CLOSE

Name* David Parent None Is person

Personal information

User ID 7777

Invoice currency EURO

Invoice credit limit 2000.00

Invoice credit allowed

Payer None

Price level None

References

Search key

Locale DE

Card ID

Person information

First name

Last name

Surname prefix

Gender None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save

 Click on the **text field** next Card ID to add the Customers Card ID.

booq v2.25.0

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Payment

Add Customer

Customer

Address

Customer

CLOSE

Name* David Parent None ☒ Is person

Personal information

User ID 7777

Invoice currency EURO

Invoice credit limit 2000.00

☒ Invoice credit allowed

Payer None

Price level None

References

Search key

Locale DE

Card ID 02937038

☐ Active

Person information

First name

Last name

Surname prefix

Gender None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save



Tick the following **box**, to make the customer active in the POS system. **Note: if the box turns blue, it has been activated.**

booq v2.25.0

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Add Customer

Customer

Address

Customer

NAME*

David

PARENT

None

Is person

☒

Personal information

User ID

7777

Invoice currency

EURO

Invoice credit limit

2000.00

☒ Invoice credit allowed

Payer

None

Price level

None

References

Search key

Locale

DE

Card ID

0293703ß

☒ Active

Person information

First name

Last name

Surname prefix

Gender

None

Contact information

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

Save and add new

Save

 Click on the **text fields** and add the Customers Personal information.

booq v2.25.0

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Add Customer

Customer

Address

Customer

CLOSE

Name* David

Parent None

Is person

User ID 7777

Invoice currency EURO

Invoice credit limit 2000.00

Invoice credit allowed

Payer None

Price level None

Description

Email address

Site url

Phone numbers

+ Add phone number

Identification

Your reference

ID

References

Search key

Locale DE

Card ID 0293703ß

Active

Person information

First name David

Last name Grunghagen

Surname prefix

Gender Male

Title

Save and add new

Save



Click on the **text fields** next to Description, Email address, Site url and add these information if necessary.

booq v2.25.0

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Payment

Edit Customer

Customer

Address

Customer

CLOSE

Name* David

Parent None

Is person ☒

Personal information

User ID 7777

Invoice currency EURO

Invoice credit limit 2,000.00

☒ Invoice credit allowed

Payer None

Price level None

References

Search key

Locale DE

Card ID 0293703ß

☒ Active

Person information

First name David

Last name Grunghagen

Surname prefix

Gender Male

Contact information

Description

Email address davidgr@gmail.com

Site url davidgrunghagen.de

Phone numbers

+ Add phone number

Identification

Your reference 2

ID 2

Save

 To add the Customers phone number click on **+Add phone number**.

boooq v2.25.0

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Payment

Edit Customer

Customer

Address

Customer

Name*DavidParentNoneIs person

Personal information

User ID7777

Invoice currencyEURO

Invoice credit limit2,000.00

☒ Invoice credit allowed

PayerNone

Price levelNone

References

Search key

LocaleDE

Card ID0293703ß

☒ Active

Person information

First nameDavid

Last nameGrunghagen

Surname prefix

GenderMale

Contact information

Description

Email addressdavidgr@gmail.com

Site urldavidgrunghagen.de

Phone numbers

+ Add phone number

Identification

Your reference2

ID2

Save



Click into the **text fields** and add the Customers name and Number*. Note: adding the name is optional, however the Number is mandatory, if you click on +Add phone number.

booq v2.25.0

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Edit Customer

Customer

Address

Customer

Name*

David

Parent

None

Is person

☒

Personal information

User ID

7777

Invoice currency

EURO

Invoice credit limit

2,000.00

☒ Invoice credit allowed

Payer

None

Price level

None

References

Search key

Locale

DE

Card ID

0293703ß

☒ Active

Person information

First name

David

Last name

Grunghagen

Surname prefix

Gender

Male

Contact information

Description

Email address

davidgr@gmail.com

Site url

davidgrunghagen.de

Phone numbers

Name

Number*

David Grunghagen

09232029

+ Add phone number

Identification

Your reference

2

ID

2

Save



Click on **Save**.

booq v2.25.0

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Edit Customer

Customer

✉ Address

Customer

CLOSE

Name*

David

Parent

None

Is person

Personal information

User ID

7777

Invoice currency

EURO

Invoice credit limit

2,000.00

Invoice credit allowed

☒

Payer

None

Price level

None

References

Search key

Locale

DE

Card ID

02937038

Active

☒

Person information

First name

David

Last name

Grunghagen

Surname prefix

Gender

Male

Contact information

Description

Email address

davidgr@gmail.com

Site url

davidgrunghagen.de

Phone numbers

Name

Number*

David Grunghagen

09232029

Identification

Your reference

2

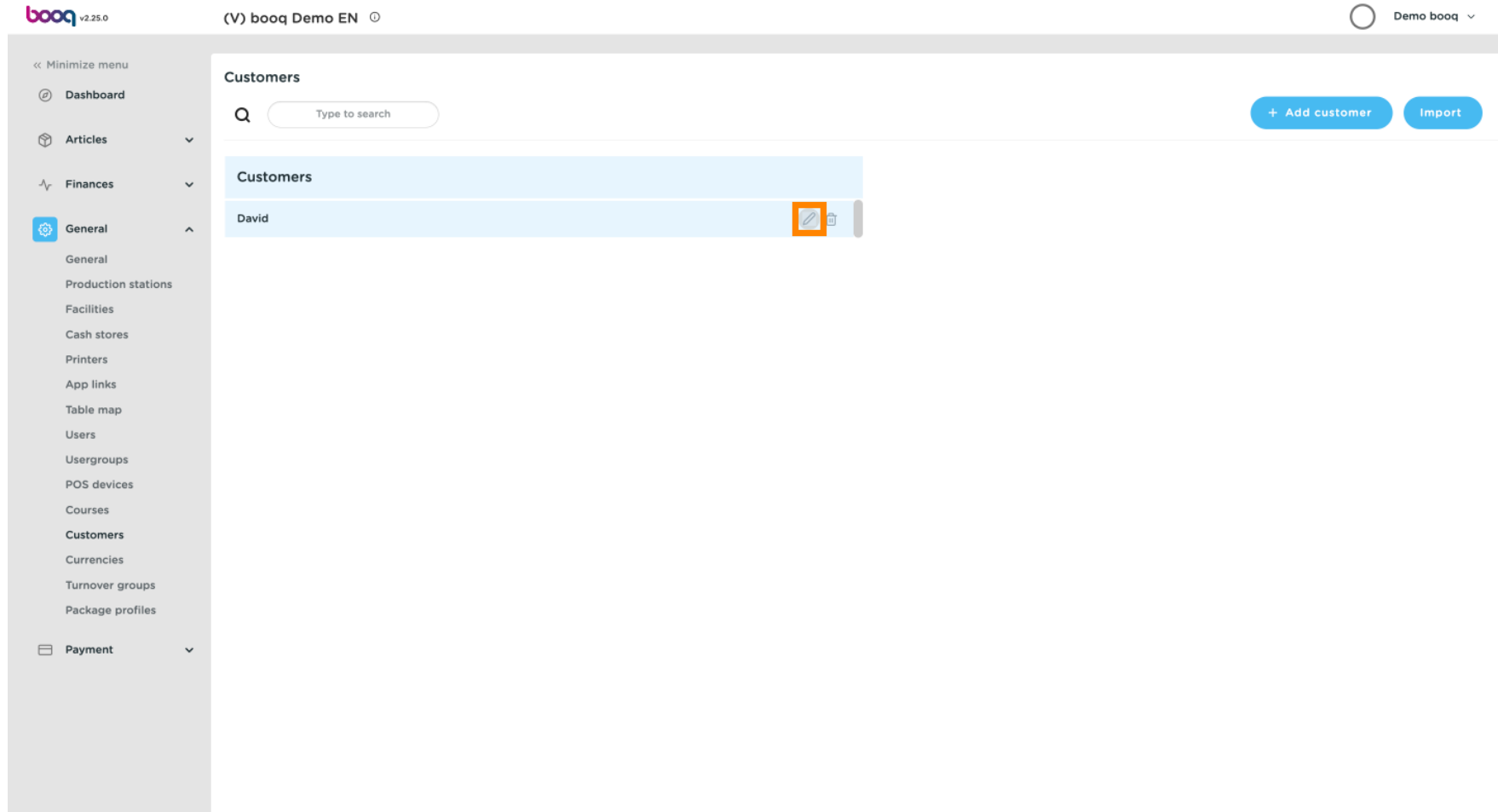
ID

2

Save



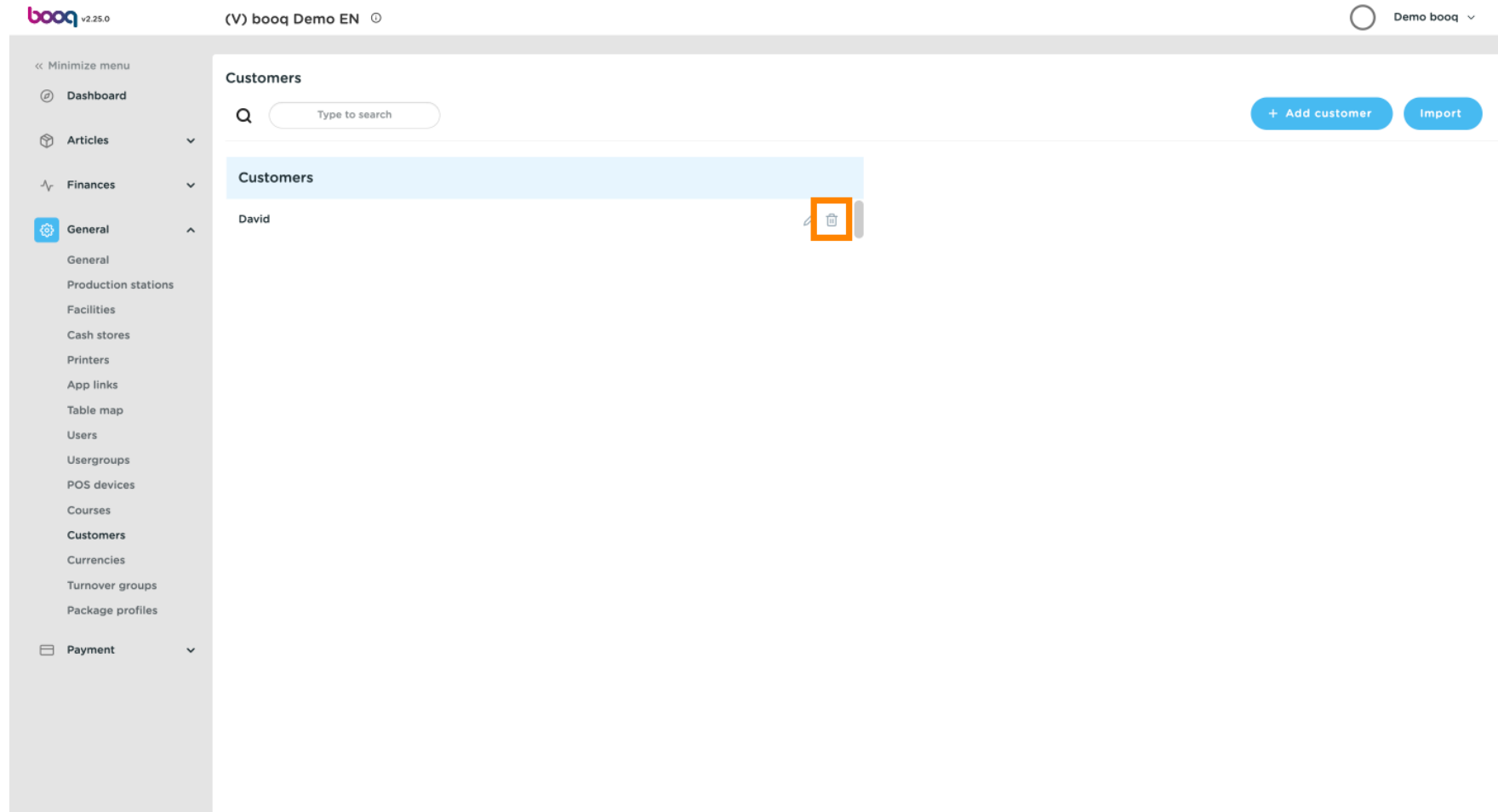
Click the **pencil icon** to edit Customer Information.



The screenshot displays the booq v2.25.0 interface. The top header shows the version and the current demo environment: (V) booq Demo EN. The left sidebar contains a menu with the following items: « Minimize menu, Dashboard, Articles, Finances, General (selected), General, Production stations, Facilities, Cash stores, Printers, App links, Table map, Users, Usergroups, POS devices, Courses, Customers, Currencies, Turnover groups, Package profiles, and Payment. The main content area is titled 'Customers' and features a search bar with the placeholder text 'Type to search'. Below the search bar, there are two buttons: '+ Add customer' and 'Import'. A table lists the customers, with the first entry being 'David'. To the right of the 'David' entry, there is a pencil icon, which is highlighted by an orange box, indicating that this customer's information can be edited.



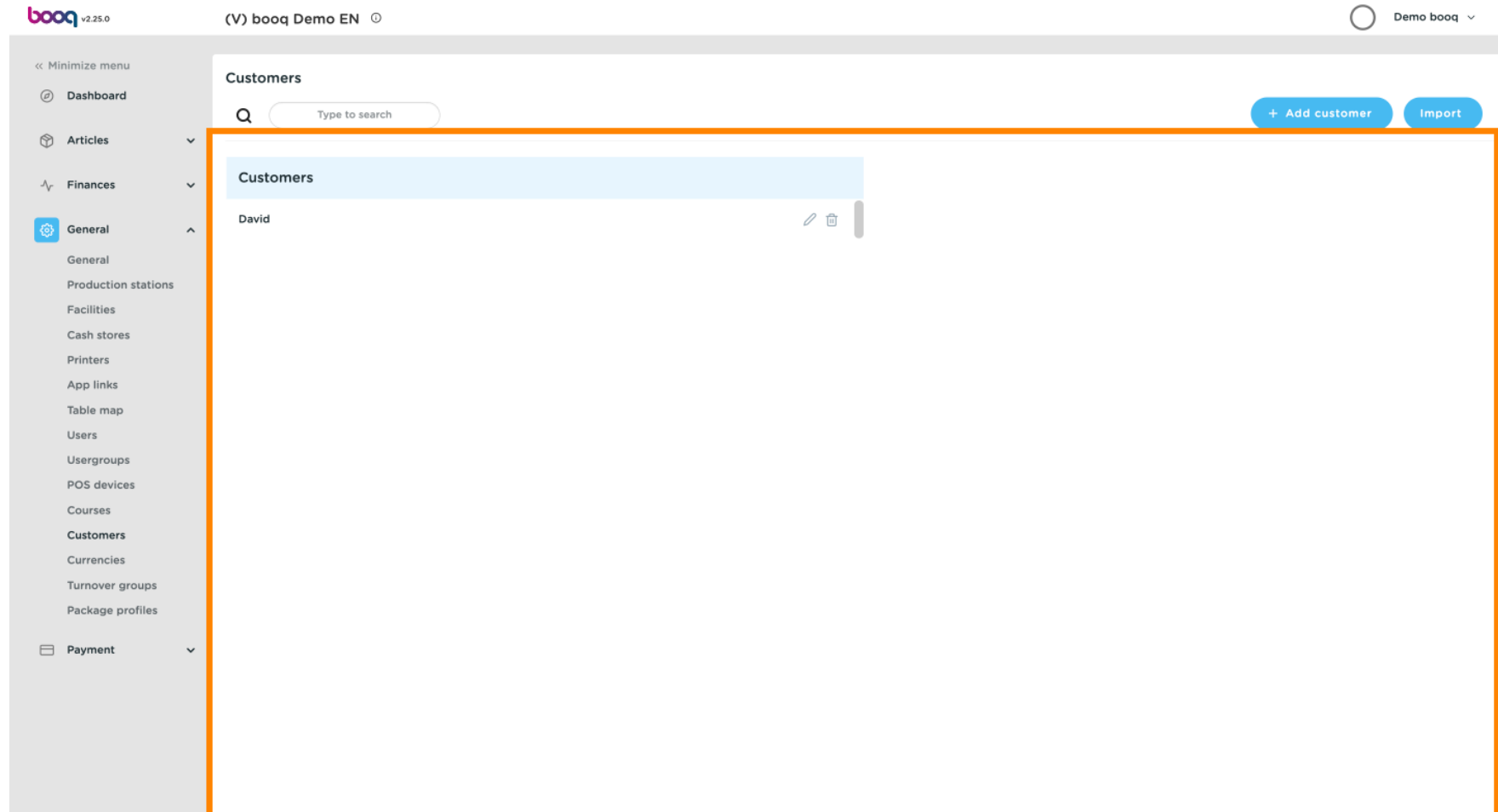
Click the **trash can icon** to delete Customer Information.



The screenshot displays the booq v2.25.0 interface for managing customers. The left sidebar shows a menu with categories like Dashboard, Articles, Finances, General, and Payment. The main content area is titled 'Customers' and includes a search bar and buttons for '+ Add customer' and 'Import'. A table lists customer information, with the first entry 'David' highlighted. A trash can icon is visible next to the 'David' entry, indicating the option to delete the customer.



That's it. You're done.



The screenshot displays the booq v2.25.0 interface for managing customers. The top header shows the version and the current demo environment. The sidebar menu on the left lists various system components, with 'General' expanded to show sub-options like 'Customers'. The main content area is titled 'Customers' and features a search bar and two buttons: '+ Add customer' and 'Import'. A table lists the existing customers, with 'David' being the only one shown. The table has icons for editing and deleting each entry.

Customers
David



Scan to go to the interactive player