

# Customer Guide: Accounts, Pricing, Exemptions, and Portal Access

Customers | Counter staff, office staff, and managers

Create and maintain customer records that drive pricing, taxes, credit, delivery addresses, statements, portal access, and payment behavior without last-minute cleanup at the counter.

## What This Guide Helps You Do

- Create customer records that support sales, delivery, tax, and collections from day one.
- Explain how customer type, discount, terms, and tax flags change checkout.
- Use portal, order-history, and balance tools from the same customer record.

## CREATE THE CUSTOMER RECORD ONCE, CORRECTLY

From Customers, choose New Customer and fill in the fields that matter operationally: name, company, contact details, type, and billing terms. FlintPOS uses this record everywhere else, so placeholders and half-finished records turn into cart mistakes later.

- 1 Enter a real person or business name**  
FlintPOS requires a name or company so receipts, statements, order search, and portal access have something stable to tie to.
- 2 Save the customer's current phone and email**  
Order copies, statements, portal invites, payment links, and delivery questions all depend on these fields.
- 3 Choose the customer type deliberately**  
Retail, contractor, and wholesale are not labels for reporting only. They change how FlintPOS looks up price tiers and delivery policies.

## CUSTOMER TYPE IS WHAT DRIVES STANDING PRICE BEHAVIOR

FlintPOS uses customer type as the normal pricing signal. Retail customers use the base product price. Contractor customers use the contractor price tier when the product has one. Wholesale customers use the wholesale tier when the product qualifies, and partial-load remainders can fall back to contractor price instead of wholesale price.

**1****Use Retail for normal cash-and-carry pricing**

Retail is the baseline. If a product has no special tier, this is the price FlintPOS will use.

**2****Use Contractor when the account gets standing contractor pricing**

FlintPOS looks for a contractor tier on each product. If the product does not have one, the line falls back to the normal retail price.

**3****Use Wholesale only when the account should follow wholesale quantity rules**

Wholesale customers can trigger wholesale product pricing, but the product still needs a wholesale tier and qualifying order rules. Below the minimum or outside the allowed increments, FlintPOS can price the remainder at contractor rate.

**Do not fake a customer type with one-off discounts**

For contractor or wholesale accounts, save the customer type and let FlintPOS reprice the order. Manual override discounts are harder to audit later.

## **DISCOUNT PERCENT, CREDIT LIMIT, AND NET TERMS ARE SEPARATE CONTROLS**

These fields solve different problems. Discount percent changes line pricing. Credit limit controls how much risk the store allows on account. Net terms control when payment is due.

- Discount percent applies to the order lines after FlintPOS resolves the normal product price.
- Credit limit should match the exposure the store is willing to carry for that customer.
- Net terms should be set before the first on-account sale so collections and statements use the right due window.

## **USE TAX-EXEMPT AND RESALE FIELDS INTENTIONALLY**

Tax status belongs on the account so every order starts from the same rule. Resale means the customer collects tax from their buyer. Tax exempt means your store should not collect tax from that customer on taxable items.

**1****Turn on Tax Exempt only after the paperwork is on file**

Save the certificate number on the customer record so the office can verify why the orders were not taxed.

**2****Use Resale for resale accounts**

Resale customers are treated as non-taxable because they charge tax downstream themselves.

**3 Correct the customer record, then reopen the order if needed**

If the tax result is wrong, fix the saved customer fields and let FlintPOS recalculate instead of trying to offset the mistake with a manual discount.

**SAVE DELIVERY ADDRESSES AS REUSABLE OPERATIONAL DATA**

Address quality matters because the saved address can drive delivery fees, dispatch notes, and destination tax. Reusable addresses are better than retyping a delivery address into each order.

**1 Add the street, city, state, ZIP, and county cleanly**

FlintPOS uses the saved address fields for more than mailing labels. Missing or sloppy location data can break delivery quoting and tax matching.

**2 Label the address so staff can pick it quickly**

Use labels such as Shop, Yard, or Delivery 12 instead of generic address entries that all look alike.

**3 Keep delivery notes with the address**

Gate codes, loader notes, and access details belong where the next order can reuse them.

**PORTAL ACCESS ONLY WORKS ON CLEAN CUSTOMER RECORDS**

Portal invites are sent from the customer record. If there is no email address, FlintPOS blocks the invite. That is the right behavior. Fix the account first, then send the invite.

**1 Confirm the email before sending the invite**

The customer cannot receive a portal setup link if the email field is blank or wrong.

**2 Use the invite for first-time setup, not for every login issue**

After the first setup, customers should use the normal forgot-password flow if they get locked out.

**3 Expect the success and failure messages to come from the saved record**

FlintPOS will report that the portal invite was sent to the customer email on file, or it will tell you the send failed so you can fix the record or retry.

**USE ORDER HISTORY AND BALANCE TOOLS BEFORE CHANGING MONEY**

The customer record is also the collections workspace. Review order history, current balance, and status before you apply payments, credits, or write-offs.

- Open the customer first, then use the Orders view so you stay inside the right account.
- Use pay-balance and credit tools in FlintPOS instead of a side spreadsheet.
- Treat write-offs as manager-controlled cleanup, not a shortcut for a confusing order.

**Keep Going**

Use the FlintPOS Docs hub to search for related guides by role, category, or job to be done. Open the interactive walkthrough at </quickstart/customer.html> when you want a screen-by-screen visual refresher.