Select or Change the Sale Customer

How to Select or Change the Sale Customer in Muhasib ERP

Overview

This guide will help you associate the sale with the correct customer, contact, and address before finalization.

The transaction uses the selected customer's ledger, credit/loyalty, contacts, addresses, terms, and reporting identity.

Who can do this

You need access to The parent transaction permission and Customer view/add when creating a missing customer.

Before you start

Search by stable customer identity/contact and check credit, loyalty, tax, payment terms, balance, and delivery details.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Open the transaction → customer selection control.

Select or Change the Sale Customer

Step 1: Open Select Customer

Step 2: Filter by customer ID/name/contact

Step 3: Select the exact customer

Step 4: Select the appropriate contact and address when prompted

Step 5: Review old transactions/balance/credit information when available

Step 6: Confirm selection

Step 7: Recheck prices, discounts, tax, loyalty, terms, and delivery after any

Recheck prices, discounts, tax, loyalty, terms, and delivery after any change.

Check your work

Confirm customer name/contact/address and balance/terms on the transaction and eventual receipt/inquiry.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not create a duplicate when the customer is hidden by filter/company/role.
- Do not change customer after payment/finalization unless the supported correction workflow permits it.

Related guides

- Create a Customer
- Configure Customer Credit and Loyalty
- Create a POS Sale

What to do next

> **Create a Customer**.

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