

3. Customer Requirements

Control customer selection, required names, and referral-source questions.

- [How to control customer selection and required last names](#)
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How to control customer selection and required last names

Register customer settings determine whether employees see the customer selector and which customer information is required.

Hide customer selection

1. Open **Settings > Register**.
2. In **Customer**, enable **Hide Select Customer**.
3. Save the settings.

Use this when the checkout workflow should proceed without presenting the normal customer-selection control.

Require a selected customer

1. Disable hiding if the selector should remain visible.
2. Enable **Select Customer Lock**.
3. Save the settings.

This prevents employees from continuing with the walk-in customer when a named customer must be attached.

Require the customer's last name

1. Enable **Last Name Mandatory**.
2. Save the settings.

After this is enabled, customer creation and editing workflows require a last name where supported.

How to require and manage “How did you hear about us?” answers

Referral-source answers help the business understand how customers discovered the store, such as a referral, website, social media, or walk-in visit.

Require an answer

1. Open **Settings > Register**.
2. In **Customer**, enable **How did you hear about us?**.
3. Open the answer manager that appears below the setting.
4. Add the choices employees should be able to select.
5. Remove obsolete or duplicate choices.
6. Save the list and Register settings.

Design useful answers

- Keep choices short and distinct.
- Use customer-friendly wording employees can select quickly.
- Avoid creating several answers that mean the same thing.
- Review the list when marketing channels change.

Once required, employees must select a configured referral source in the applicable customer workflow.