

Customers

Frequently asked questions

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Frequently asked questions

Quick answers about managing customers.

Accounts

Is a customer the same as a login account?

They're linked one-to-one: each customer record has a login (user) account; deleting the user deletes the customer.

What are the company / tax-exempt / test flags?

They mark business accounts, tax-exempt customers, and internal test accounts (test accounts are hidden from the list by default).

What happens when I delete a customer?

It's a **soft delete** — the record is removed from normal views but history is preserved (a forced delete can cascade orders).

Duplicate customers

How do I merge duplicate customers?

On the Customers list, tick the duplicates (two or more, up to 20), then choose **Actions** → **Merge Selected Customers**. Pick the record to keep, read the summary of what will move and what will be deleted, and click **Merge**.

What happens to the orders, addresses and other history?

They move to the record you keep: orders, billing and shipping addresses, payment methods, carts, quotes, reviews, service repair work orders, notes, documents, subscriptions, layaways and trade-ins. Store credit and rewards balances for the same store or program are added together.

What happens to the duplicate's login?

The kept record keeps its own login (or takes over one if it had none). Any other login is removed after its saved carts, payment methods, favorites and wish lists move across, so the customer signs in with the kept record's login email.

Can I undo a merge?

No — the merged records are deleted. Check which record is marked **Keep** before you confirm. Merge History keeps each merged record's details as they were.

Where can I see who merged customers, and when?

Customers → **Actions** → **Merge History** lists every merge with the date, the staff member, the kept customer, the records merged in and what moved. The kept customer also gets a *Customer records merged* note.

Addresses

Can a customer have several addresses?

Yes — multiple billing and shipping addresses, each with a default per type, verification flag and SMS/email opt-ins. Duplicates are prevented.

Search

Why can I find customers with a misspelled name?

Global search uses full-text plus trigram (fuzzy) matching across customer and address fields; if `pg_trgm` isn't installed it falls back to case-insensitive matching.

Orders & assisted checkout

Can I place an order for a customer?

Yes — build a cart on the customer page (products, quantities, delivery, coupons), then check out and create the order on their behalf.

Where do I start a refund?

From the customer's order history / order detail.

Data

How do I bulk-load customers?

Use Import (CSV/XLSX) with auto-mapped headers and per-row validation; export to XLSX by all/filtered/selected.

Who can manage customers?

Admin users; the storefront account view lets customers manage their own profile/addresses/orders.