

Customers

Feature List — capability overview

Shop · September 2026

At a glance

The **Customer** module manages the whole customer lifecycle: **accounts** and profiles, **billing/shipping addresses** (with verification and notification preferences), order history, saved and abandoned **carts**, internal **staff notes** and **attachments**, and **assisted checkout** (staff build a cart and place an order on a customer's behalf). Each customer links to a login account, powerful **search** (full-text + fuzzy) spans customer and address fields, and duplicate records can be **merged** into one with a full **Merge History**.

Core capabilities

Area	What it gives you
Accounts & profiles	Name, email(s), phone(s), company, tax-exempt / company / test-account flags; one customer per login account.
Addresses	Multiple billing/shipping addresses with defaults, verification flag, and per-address SMS/email notification opt-ins; uniqueness checks.
Orders & refunds	Full order history on the customer page and a storefront account view, with refund workflows.
Carts	Saved and abandoned carts, plus assisted cart building and checkout by staff.
Notes & attachments	Internal staff notes and file uploads per customer.
Merge duplicates	Combine two or more customer records into the one you keep: orders, addresses, payment methods, carts, service repairs, store credit and more move across; blank details are filled in; the duplicates are deleted.
Merge History	Every merge recorded with who, when, the kept customer, the merged records' details and what moved; filterable, and not editable.
Import / export	Bulk import (CSV/XLSX) and export (XLSX) with all / filtered / selected scope.
Search	Global full-text + trigram (fuzzy) search across customer and address fields (graceful ILIKE fallback).

Assisted checkout

Staff can build a cart for a customer (search products, set quantities, choose delivery, apply coupons), enter billing/shipping and payment, place the order, and see a confirmation — all from the customer's admin page.

Merging duplicates

Tick the duplicate records on the Customers list and choose **Merge Selected Customers**. Staff see each record's details and history side by side, pick the one to keep, and read exactly

what will move and what will be deleted before confirming. The merge completes in one step, and **Merge History** keeps the record.

Storefront account

Customers get a dashboard to view/edit their profile, manage addresses, and review order history (with refund actions where applicable).

Under the hood

Item	Value
Module	Shop → Customer
Data	<code>shop_customer</code> , <code>shop_customer_address</code> , <code>customer_note</code> , <code>customer_attachment</code> , <code>customer_merge_log</code>
Search	PostgreSQL FTS + <code>pg_trgm</code> similarity indexes
Links	User login (one per customer), Orders, Finance/refunds, Cart