

Customers

Accounts, addresses, orders & assisted checkout

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Know your customers — and serve them faster

The Customer module gives your team a complete, searchable view of every shopper: accounts, addresses, orders and carts, plus the ability to build a cart and place an order for them on the spot.

Why teams love it

One profile, the whole picture

Names, contact details, company and tax status, addresses, order history, notes and files — all on one page, tied to the customer's login.

Find anyone in a keystroke

Global search spans customer and address fields with fuzzy matching, so a misspelled name or partial phone still lands the right record.

Sell on their behalf

Assisted checkout lets staff build a cart, apply a coupon, take payment and place the order for a customer — perfect for phone orders and clienteling.

Clean, correct addresses

Multiple billing/shipping addresses with defaults, verification and notification opt-ins keep fulfillment and messaging accurate.

One customer, one record

Duplicates happen — a walk-in record at the till, a second online sign-up. Merge them in a few clicks: pick the record to keep and every order, address, saved card, cart, repair and store credit balance moves onto it. Merge History shows who merged what, and when.

Grow your list responsibly

Newsletter and per-address SMS/email opt-ins, plus bulk import/export, make list management straightforward.

What you can do

Goal	How the Customer module delivers
Answer "what did they order?"	Order history and details on the customer page.
Take a phone order	Assisted cart builder + checkout.
Keep records tidy	Notes, attachments, address verification, soft deletes.
Clean up duplicates	Merge customers into one record, with a full Merge History.
Migrate or report	CSV/XLSX import and XLSX export (all/filtered/selected).
Find a needle in a haystack	Fuzzy global search across customers and addresses.

The bottom line: a single, searchable customer hub that also lets your team sell on the customer's behalf.