

Customers

Setup Guide

Shop · September 2026

Configure the customer hub

Apply patches, confirm search indexes, and set your account/address conventions; then create customers, manage addresses, and (optionally) place orders on a customer's behalf.

Before you start: apply patches at `/admin/Admin/patches` (creates tables, registers routes, and builds the search indexes). Admin rights required. Search uses PostgreSQL `pg_trgm`; ensure the extension is available for best results.

1. Verify install

- 1 Confirm patches applied cleanly (customer/address tables, cart/checkout routes, search indexes, and the Merge History log).
- 2 Open **Customers** and confirm the grid and global search work.

2. Create a customer

- 1 **Customers** → **Create**: enter name, email, phone; set company / tax-exempt as needed.

A linked login account is created.

- 2 Add **billing** and **shipping** addresses; mark defaults; set verification and notification options.

3. Everyday management

- 1 From the customer page, review **orders**, add **notes**, upload **attachments**, and manage **addresses**.
- 2 Use **Change status** to activate/deactivate; deletes are soft (history preserved).
- 3 Found a duplicate? Tick both records on the Customers list, choose **Actions → Merge Selected Customers**, pick the record to keep and confirm. Review past merges under **Actions → Merge History**.

4. Assisted checkout (optional)

- 1 On the customer page, **build a cart**: search products, set quantities, choose delivery, apply a coupon.
- 2 Enter billing/shipping and payment, then **create the order** and review the confirmation.

5. Import / export

- 1 **Import** customers from CSV/XLSX (headers auto-mapped); review per-row validation before committing.
- 2 **Export** to XLSX with *all*, *filtered*, or *selected* scope.

Order: **Verify install → Create customer & addresses → Manage → (Assisted checkout) → Import/Export.**