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INDITION COMMERCE

Shop Customers

Complete User Manual — Customer Accounts, Addresses, Orders, Payment Methods, Notes, Documents, Carts & Admin Checkout

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Contents

1. Introduction & Core Concepts

The **Customers** area is the back-office workspace where staff manage everyone who shops on the store. From here you create and edit customer accounts, manage their addresses and saved cards, review their orders and abandoned carts, attach notes and documents, and — when a customer phones in or needs help — build a cart and place an order on their behalf. This manual is written so a new team member can read it cover to cover and operate every feature confidently.

1.1 What the module manages

- **Customers** — the people (or companies) with accounts on the store, each tied to a login.
- **Addresses** — a customer's billing and shipping addresses, with one default of each kind.
- **Orders** — every order the customer has placed, shown read-only on their page.
- **Payment Methods** — saved cards (payment profiles) held with the payment gateway.
- **Carts** — saved and abandoned carts, plus admin-built carts you create for the customer.
- **Notes & Documents** — internal, staff-only memos and uploaded files attached to a customer.

1.2 How everything relates

Understanding the relationships is the key to using the area well:

- A **Customer** is linked to exactly one **login account** (the user who signs in to the storefront). The customer record holds the shopping profile; the account holds the login email, password and status.
- A customer has many **addresses** (each flagged billing or shipping), many **orders**, many **carts**, zero or more saved **payment methods**, and any number of staff **notes** and **documents**.
- One billing address and one shipping address can be marked as the customer's **default**; these pre-fill new orders.
- A **cart** you build for a customer can be taken through **checkout** to become one or more **orders** — exactly as if the customer had checked out themselves.

1.3 The customer record vs the login account

Two things are stored side by side, and it helps to keep them straight:

Customer record	Login account
First/last name, company name, **Primary Email**, **Primary Phone**, test-account & tax-exempt flags, order history, carts, addresses.	**Login Email** (the sign-in address), password, **Account Status**, two-step verification, last login.

The Primary Email and Login Email can differ — the Primary Email is where order-related mail goes, while the Login Email is what the customer types to sign in. Both are shown on the customer page and in the list.

1.4 Account statuses

Every customer's login account carries one status. It governs which account actions are offered:

Status	Meaning
Active	Normal, working account. Can sign in and order.
Inactive	Switched off (deactivated). Kept for history, cannot sign in.
Unapproved	Awaiting activation — the customer has not yet confirmed their account.
Banned	Blacklisted. Blocked from signing in or ordering.
Deleted	Marked deleted (a soft delete) — removed from normal use but retained.

1.5 Test accounts & tax-exempt customers

- **Test Account** — a flag marking an account as a staff/test record rather than a real shopper. The Customers list hides test accounts by default (see 2.3), and a red indicator shows on the customer page.
- **Tax Exempt** — a flag marking the customer as exempt from tax. When you turn it on, the system reminds you to **upload supporting documents** (use the Documents feature, section 5.4).

1.6 Permissions, time zone & conventions

- These screens are part of the Shop admin and require the appropriate administrator access.
- All dates/times follow the **store/database time zone**, not your browser's.
- Lists show a helpful empty message; numeric columns are right-aligned; grids support sorting, filtering, page-size selection and export.
- Account actions and deletions **confirm first**; actions that don't apply to the current account status are hidden rather than shown disabled.

2. The Customers List

Open **Customers** from the Shop navigation. The list is a full-featured grid: search, sort, filter, select, page, import and export.

2.1 Columns

Column	Shows
(checkbox)	Select the row for export or bulk handling. The filter row has a "select all visible" checkbox.
First Name / Last Name	The customer's name; click either to open the customer.
Primary Email	The customer's contact email.
Primary Phone	The customer's contact phone.
Login Email	The email used to sign in (may differ from Primary Email).
Account Status	Active, Inactive, Unapproved, Banned or Deleted.
2 Step Verification	A green check if two-step login is enabled, a red ban icon if not.
2 Step Verification Phone	The phone number used for two-step verification.
Orders Count	How many orders the customer has placed (right-aligned).
Last Order Date	Date of the most recent order.
Last Login Time	When the account last signed in.
Time Added	When the account was created.
Default Billing Address	The customer's default billing address.
Default Shipping Address	The customer's default shipping address.
Actions	A **search/view** icon to open the customer, and a **more** icon that opens the row action menu (2.5).

2.2 Filtering & searching

Every column has a filter control in the filter row directly under the headers. Type into the text filters (names, emails, phone), choose a status from the **Account Status** dropdown, set **Enabled / Disabled** for two-step, or enter a number for Orders Count. The date columns (Last Order Date, Last Login Time, Time Added) use a date-range picker. Click **Clear Filters** (in the Actions column's filter cell) to reset everything.

2.3 The "Filter Out Test Accounts?" toggle

At the top-left of the grid is a **Filter Out Test Accounts?** switch. When it is **YES** (the default), test accounts are hidden and you see only real shoppers. Flip it to **NO** to include test accounts in the list. The toggle also adjusts what the **Export** includes.

2.4 Selecting customers & page size

- Tick row checkboxes (or "select all visible") to choose customers. The selected count appears as a clickable link reading *"N Customers Selected"*; clicking it switches the grid into **selected-only** mode, where a **Show Full Grid** control returns you to everything. Selections persist across paging and filtering.
- Use the **Page Size** selector (50 / 100 / 250 / 500 / 1000) to change how many rows show per page. The grid scrolls horizontally for the wider columns.

2.5 Row actions

Each row's Actions cell has two icons:

- **View** (magnifier) — opens the full customer page.
- **More** (...) — opens a small menu of account actions appropriate to that customer's status: **Reset User Password**, **Resend Activation Email** (unapproved only), **Activate**, **Deactivate** or **Delete**, and **Blacklist**. Each asks for confirmation. These behave exactly like the same actions on the customer page (Chapter 6).

2.6 The Actions menu

The page's top-right Actions menu offers:

- **Export Customers** — download the list as an Excel `.xlsx` file (see 14.1).
- **Import Customers** — open the import workflow (see 14.2).
- **Create Customer** — open the new-customer form (Chapter 3).

3. Creating a Customer

From the Customers list choose **Create Customer**. The form creates the login account and the customer profile together, in two panels.

Account Information

- **First Name** and **Last Name** (required).
- **Email** (required) — the login email for the account.
- **Status** (required) — the starting account status (e.g. Active).
- **Password** and **Confirm Password** (required).

Customer Profile

- **Email** (required) — the customer's primary contact email.
- **Telephone** (required).
- **Company Name** (optional).
- **Test Account** — YES/NO toggle (default NO).
- **Tax Exempt** — YES/NO toggle (default NO).

1. Fill in both panels.
2. Click **Create Customer** (or **Back** to abandon).
3. On success you land on the new customer's page, ready to add addresses, notes or an order.

> The account and profile are saved together. If anything fails validation, nothing is saved and the form shows what to fix.

4. The Customer Page & its Tabs

Opening a customer shows a single page headed with the customer (or company) name followed by **Customer Details** (or **Company Details**). Below the heading is a row of tabs:

Tab	Contents
Customer Information	The core profile panel, plus Customer Notes and Customer Documents. (Chapter 5)
Orders	Every order the customer has placed. Shown only if the customer has orders. (Chapter 7)
Billing Addresses	The customer's billing addresses. (Chapter 8)
Shipping Addresses	The customer's shipping addresses. (Chapter 8)
Payment Methods	Saved cards held with the gateway. (Chapter 9)
Carts	Saved and abandoned carts. Shown only if the customer has any. (Chapter 10)

Top action buttons

Across the top of the page is a set of buttons. Which appear depends on the account status:

- **Add Note**, **Add Document**, **Update** — always available.
- **Reset Password** — hidden for Banned, Inactive and Deleted accounts.
- **Resend Activation Email** — only for Unapproved accounts.
- **Deactivate** — only for an Active customer who has orders. **Delete** — only for a customer with no orders.
- **Activate** — whenever the account is not already Active.
- **Blacklist** — whenever the account is not already Banned.
- **Create Cart** — start building a cart for the customer (Chapter 11).
- **Add Billing Address** / **Add Shipping Address** — open the address form (Chapter 8).

5. Customer Information

5.1 The information panel

The first tab shows a summary table of the customer:

- **Name** (or **Company Name** for company customers)
- **Primary Email** and **Primary Phone**
- **Login Email**
- **Account Creation Time** and **Last Login Time**
- **Status** (with a Test Account indicator when applicable)
- **Number of Orders** and **Number of Carts**
- **Tax Exempt** — a green check or a red ban icon

5.2 Updating customer details

1. Click **Update** (top of the page). A modal opens titled **Update**.
2. Edit **First Name**, **Last Name**, **Company Name** (company customers only), **Primary Email** and **Primary Phone**, and set the **Test Account?** and **Tax Exempt?** toggles.
3. Click **Submit**. The page updates in place — no reload.

> If you switch **Tax Exempt** on, the confirmation reminds you: *"Customer is set to Tax Exempt status. Please upload supporting documents."* Use Add Document (5.4) to attach the exemption paperwork. First Name, Last Name, Email and Phone cannot be blank.

5.3 Customer Notes

Notes are internal, staff-only memos. The **Customer Notes** grid appears on the Customer Information tab once at least one note exists, with columns **Title**, **Content**, **Added By** (the staff member) and **Added On**, each filterable, plus a delete action.

1. Click **Add Note** (top of the page). The **Add Note** modal opens.
2. Enter a **Title** and the **Note** text (both required).
3. Click **Submit**. The note is stamped with you as the author and added to the grid.

To remove a note, click its trash icon and confirm.

5.4 Customer Documents

Documents are files attached to the customer (for example a tax-exemption certificate). The **Customer Documents** grid appears once at least one file exists, with columns **File Name**, **File Type**, **Added By** and **Added On**, plus download and delete actions.

1. Click **Add Document** (top of the page) and pick one or more files. Accepted types are `.png`, `.jpg`, `.doc`, `.docx` and `.pdf`.
2. The upload runs immediately and the files appear in the grid.
3. Use the **download** icon to retrieve a file, or the **trash** icon to delete one (the file is removed from storage as well).

6. Account Actions

These buttons act on the customer's *login account*. Each one confirms before it runs, and the available set changes with the current status. They are offered both on the customer page and from the list's row action menu (2.5).

6.1 Reset Password

Sends the customer the store's own password-reset email. You're asked to confirm *“Send reset password email to [name]?”*. Not available for Banned, Inactive or Deleted accounts.

6.2 Resend Activation Email

For an **Unapproved** account that hasn't been activated yet, re-sends the activation email so the customer can confirm their account.

6.3 Activate / Deactivate

- **Activate** sets the account back to Active. Offered whenever it isn't already Active.
- **Deactivate** sets an Active account to Inactive. Offered for an Active customer who has orders (so their history is preserved rather than deleted).

6.4 Delete

For a customer with **no orders**, **Delete** marks the account deleted (a soft delete). Customers who have orders are deactivated instead, never deleted, so their order history is never lost.

6.5 Blacklist

Blacklist sets the account to **Banned**, blocking the customer from signing in or ordering. Offered whenever the account isn't already banned.

> After any status change the page updates the Status display and re-shows the right buttons automatically — for example, activating a customer with orders reveals Deactivate, while one without orders reveals Delete.

7. Orders

The **Orders** tab lists every order the customer has placed. It appears only when the customer has at least one order. Columns include:

Column	Shows
Order Number	The order ID, linked; opens the order in a new tab.
Status	The order status (highlighted when an unaccepted order is overdue).
Order Total	The order amount.
Shipping Method	The delivery method used.
Products	The products on the order.
Billing / Shipping Address	The addresses used on the order.
Payment Method & Payment Status	How it was paid and the payment state.
Store	The store the order belongs to.
Order Date	When the order was placed.
Actions	View the order; download (for in-store-pickup orders); and **Resend** the order confirmation.

Status, Shipping Method, Products, Payment Status and Store each have a multi-select filter; Order Date has a date-range filter (with a **Clear Dates** button); Order Number filters by value.

Re-sending an order confirmation

The **Resend** action opens a **Re-Send Order Confirmation** modal listing the available confirmation messages (email and, where applicable, SMS) with checkboxes and a **Select All** option. Tick what to send and click **Resend**.

8. Addresses (Billing & Shipping)

A customer's addresses live on two tabs — **Billing Addresses** and **Shipping Addresses** — which behave identically.

8.1 The address grid

Column	Shows / does
Name	First and last name on the address.
Address	The full formatted address.
Phone / Email	Contact details on the address.
Default	A green check if this is the default; click the ban icon on another address to make it the default.
Email Notifications	Whether order-related emails go to this address — click to toggle.
SMS Notifications	Whether order-related texts go to this address — click to toggle.
Status	Active/inactive — click to toggle.
Actions	An **edit** (pencil) and a **delete** (trash) button.

8.2 Adding & editing

1. Click **Add Billing Address** / **Add Shipping Address** (top of the page), or the **edit** pencil on an existing row. A modal opens titled e.g. *Add Billing Address*.
2. Fill the address fields (name, company/tax fields where shown, address lines, city, **State** from the dropdown, postcode, email and phone). Required fields are marked with a red *.
3. Set the two notification toggles — **Receive Order Related Email Messages?** and **Receive Order Related SMS Messages?**
4. Click **Submit**.

8.3 Address verification

When you submit, the address is validated. If it doesn't match cleanly, an **address verification** dialog appears offering a standardized **suggested address** (or a list of candidates). You can accept a suggestion — which replaces the street/city/state/postcode while keeping the name, email and phone — or keep the address you entered. If the address genuinely can't be verified, the dialog explains the problem so you can correct it.

8.4 Default address & inline toggles

Each customer keeps one default billing and one default shipping address; setting a new default clears the previous one of that type. The **Default**, **Email Notifications**, **SMS Notifications** and **Status** cells toggle directly in the grid — no need to open the edit form. Use the **trash** icon (with confirmation) to delete an address.

9. Payment Methods

The **Payment Methods** tab lists the customer's saved cards (payment profiles) held with the payment gateway. Columns:

Column	Shows
Payment Method	The card type (e.g. Visa) or method (e.g. COD).
Last 4 Digits	The last four digits of the card.
Gateway	The processor holding the card (e.g. Authorize.Net, PayTrace, Stripe).
Expiration Date	The card's expiry (shown in red if expired); “N/A” for methods such as COD.
Actions	A **delete** (trash) button to remove the saved method.

Removing a payment method deletes the saved profile; it does not affect past orders. Saved cards listed here are also offered during admin checkout (Chapter 12).

10. Carts (Saved & Abandoned)

The **Carts** tab appears when the customer has any saved or abandoned carts (it does not count freshly admin-created carts). Each cart is one of two types:

- **Saved** — a cart the customer (or you) deliberately saved.
- **Abandoned** — a cart left without being turned into an order.

Column	Shows / does
Cart Id	The cart's identifier.
Type	A Saved or Abandoned badge (filterable: All / Saved / Abandoned).
Cart Products	The products in the cart (multi-select filter).
Created / Last Updated	When the cart was started and last changed (date-range filters).
Actions	**Load** (open in the cart builder), **Checkout** (go straight to checkout), and **Delete**.

> A cart that has already been turned into an order cannot be edited or deleted.

11. Building a Cart for a Customer

The **Cart Builder** lets you assemble a cart on a customer's behalf — useful for phone orders or assisted checkout. Reach it from **Create Cart** on the customer page, or **Load** on an existing cart in the Carts tab.

The page is headed *"Create Cart #N for [customer]"* and is split into two columns. **Back to Customer** returns to the customer page at any time.

Finding & adding products (left)

1. Type into the **Keyword** box — you can search by *SKU, product name, barcode, category, or vendor* — and click **Search** (or **Clear** to reset).
2. The results table shows **Product** (SKU and name), **Price** and **Available** (stock on hand). A line below reports how many products were found and the current page; use **Previous** / **Next** to page through.
3. Enter a quantity and click **Add** to put the product in the cart. Stock is checked as you add.

The cart (right)

- Each line shows the product name, SKU, a quantity control (**–** / box / **+**), its line total, and a trash icon to remove it. When the cart is empty it reads *"No products added."*
- The running **Total** shows at the foot of the cart.
- Add an optional **Save Note** for the cart.
- **Save Cart** stores the cart against the customer; **Checkout** moves on to placing the order. Both are disabled while the cart is empty.

> If you don't add your own note, the cart is stamped with a default note recording who created it and when.

12. Cart Checkout & Placing an Order

The **Checkout** page (headed *"Checkout Cart #N for [customer]"*) turns a cart into a real order. **Edit Cart** returns to the builder; **Back to Customer** leaves checkout. The left column is the checkout form; the right column is a live **Order Summary**.

12.1 Billing & shipping address

- **Billing Address** (required) — pick a saved billing address from the dropdown, or, if none is on file, fill the inline form (it will be saved to the customer). The hint reads: *"No billing address on file — enter one below. It will be saved to this customer."*
- **Shipping Address** — shown only when the cart needs shipping. Choose a saved shipping address, leave it on **Use Billing Address**, or enter a new one inline. Shipping addresses run through the same verification as section 8.3, including accepting a standardized suggestion.

12.2 Delivery method & items

The **Order Items** table lists each line with its **Delivery Method** (a dropdown when more than one option exists — e.g. shipping vs in-store pickup), an editable **Qty**, the unit **Price** and the line **Total**. Every item must have a delivery method before the order can be placed.

12.3 Coupons & the order summary

The right-hand **Order Summary** updates live as you change addresses, quantities and delivery methods, showing **Subtotal**, **Promotional Discounts**, **Shipping**, **Taxes** (with rate detail), any **Fees**, and the **Total**. To apply a discount, type a code into **Coupon Code** and click **Apply**; applied coupons appear with a remove button. Codes are validated (a code can't be applied twice, and non-stackable promotions block others).

12.4 Payment & completing the order

1. Under **Payment Method**, choose one of the customer's saved cards, or — when Stripe is enabled — **Add a New Card** and enter the card number, expiry and CVC.
2. Review the Order Summary total.
3. Click **Complete Order**. (The button is disabled if there's no payment method available or the cart is empty.)

> If shipping is required, the address is verified first; if the system has a cleaner version it will ask you to confirm the suggested address before the order is placed. A single cart may produce more than one order (for example when items ship separately) — all resulting orders are returned to you.

13. Order Confirmation

After a successful checkout you land on the **order confirmation** page. It summarises what was placed: the order number(s), date and total; the customer; the billing and shipping addresses used; the line items (SKU, name, quantity, unit price and line total); and the payment status. From here you can open the order(s) in the main order-management screens to continue processing (fulfilment, invoicing, and so on).

14. Importing & Exporting Customers

14.1 Exporting

From the Customers list choose **Export Customers**. A timestamped Excel `.xlsx` file downloads honouring your current grid filters and selection (and the test-account toggle). Exported columns include Customer ID, First/Last Name, Primary Email, Primary Phone, Login Email, Account Status, two-step verification and its phone, Orders Count, Last Order Date, Last Login, Time Added, Default Billing & Shipping Addresses, Company Name, Test Account and Tax Exempt.

14.2 Importing (upload → map → apply)

Choose **Import Customers**. Customers are imported (and matched) by **Login Email**: existing accounts are updated and missing ones are created.

1. **Upload** — drag-and-drop or browse a **CSV or Excel** file (the first row is treated as headers) and click **Upload**.
2. **Map columns** — for each system field, pick the matching spreadsheet column. **First Name**, **Last Name** and **Login Email** are required; **Primary Email** (defaults to the login email), **Primary Phone**, **Company Name**, **Account Status** (defaults to Active), **Test Account** and **Tax Exempt** are optional. A preview of the first rows is shown to help you map.
3. Click **Apply Import**. (Use **Upload Different File** or **Back** to start over.)

When it finishes you get a summary — *"Imported: X, Skipped: Y"* — and, if any rows failed, a list of the errors.

> Boolean columns (Test Account, Tax Exempt) accept the obvious values: `1/true/yes/y/on/active` for on and `0/false/no/n/off/inactive` for off. Account Status accepts active, inactive, unapproved, banned or deleted.

15. Appendix: Status & Glossary Reference

15.1 Account statuses

Active · Inactive · Unapproved · Banned · Deleted. The actions offered on a customer depend on the current status (see Chapter 6).

15.2 Cart types

Saved · Abandoned. Admin-built carts you create from **Create Cart** are worked on in the cart builder and become orders at checkout.

15.3 Glossary

Term	Meaning
Customer	A shopper's profile record on the store (name, contact details, history).
Login account	The sign-in identity tied to a customer (login email, password, status, two-step).
Primary Email	Where the customer's order-related mail is sent.
Login Email	The email the customer types to sign in (may differ from Primary Email).
Default address	The one billing and one shipping address used by default for new orders.
Payment method / profile	A card saved with the payment gateway for re-use.
Saved cart / Abandoned cart	A cart kept on purpose / left without being ordered.
Test account	An account flagged as a test record; hidden from the list by default.
Tax exempt	A customer flagged as exempt from tax; supporting documents should be attached.
Address verification	The check that standardizes an address and may suggest a cleaner version before saving or ordering.

End of manual. Shop Customers module v5.2.6.