

Customers Overview

Customer accounts represent the end users of your site(s) who have either registered with your business or purchased from you, or both. A customer account allows you to view and manage a visitor's activity across all sites associated with a tenant, including contact information, purchase history, wish list items, store credit activity, and more.

The Kibo eCommerce solution uses the full functionality of the customer object, including customer sets and segments as well as managing shopper accounts where customers can log into the storefront. An Order Management-only implementation of the Unified Commerce Platform does not include these storefront or marketing functions, but still tracks customer data for order management purposes and allows customer records to be viewed and edited.

Refer to the [Customers API documentation](#) for the API requests associated with this feature.

Types of Customer Accounts

There are two types of customer accounts: registered shopper accounts and guest accounts. Both can be created organically by visitors or by administrators during a storefront visit or a Admin session, or by an administrator when importing customer data through the [Unified Platform API](#) or using the [Kibo eCommerce Import/Export Tool](#).

- **Registered shopper accounts:** Created through a registration event, with or without a purchase. They feature a username and password as login values. By default, the username is the shopper's email address, but you or the shopper can change this value to any valid character string. Certain account functions are only available to registered shoppers. For example, you can disable accounts for security purposes, or unlock them when a shopper becomes locked out for too many failed login attempts. You can also trigger a password reset email on a shopper's behalf.
- **Guest accounts:** Created when an order is placed without accompanying registration. They feature a unique ID number as the primary identifier. These accounts allow you to keep track of purchasing history for visitors who prefer not to register. A single email address may be used on an unlimited number of guest accounts, but it can only be used on one registered shopper account.

Customers Page

You can perform the following actions on the customers page at **Main > Customers > Customers**:

- Search for shopper accounts.
- Sort your shoppers by clicking a column heading.
- Click the **More Actions** button to view the available steps you can apply to an account, such as unlocking or editing.
- Click a row to view or edit account details.

Search for Customers

You can search for customers using the quick search bar to enter keywords and/or the dropdown Advanced Filter menu. This supports searching by customer first and last name, phone number, customer segment, and customer set. Neither search is case-sensitive.

Quick Search

In the quick search bar, entering a number with no other data such as "22" will bring up the customer with that customer number. Entering text with no other data will bring up customers with that first or last name.

Characters such as asterisks will be removed, so using them as "wildcards" is not necessary. Searching for ga* will have the same result as searching for ga.

Advanced Filters

When using advanced filters to search for customers based on specific criteria, you can choose between performing an Exact Search (which is the default behavior) or a Contains Search. An Exact Search will return only results that exactly match your input value, while a Contains Search will return any results that include your input (such as Customer 12345 when you search for 234). In either case, multiple filters can be applied at once. However, note that the Contains search is not supported for phone numbers. When searching for a phone number, only exact results will be returned.

You can also enter a text value to perform a keyword search (which is not changed by your Exact Search or Contains Search selection).

Advanced Filter ×

Exact Search Contains Search •

Keyword Search

Exclude Guest Checkouts

Segments ▼

Customer Set ▼

First Name

Last Name

Phone Number

Reset Cancel Filter



If you attempt a contains search from the Advanced Filter menu where one field has three characters and another field has less than three, such as if you enter "Smi" for the last name and "Jo" for the first name, then the system will only search based on the three-character field.

View Additional Customer Fields

Some fields do not display by default. To view additional fields:

1. In the right-hand corner of the customer grid, select the options button (represented by three dots).
2. From the drop-down menu, select the fields that you want to view on the Customers grid.

