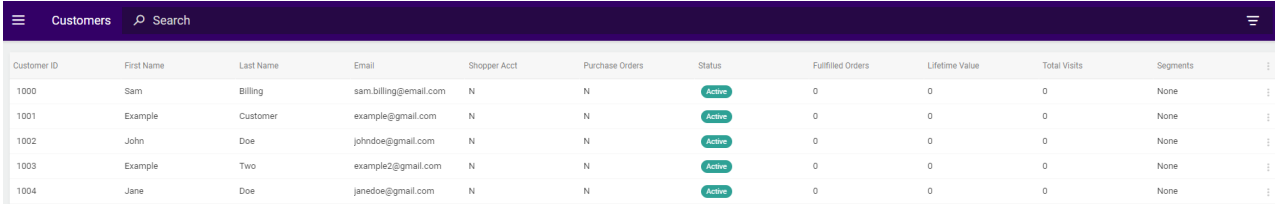


Manage Customer Accounts

While you can't create new accounts from the Customers UI (as that must be done while checking out an order or via API), you can view and edit existing customers. For more details about changing a customer's account password or updating its access level, see the [Customer Account Access guide](#).

Customers Grid

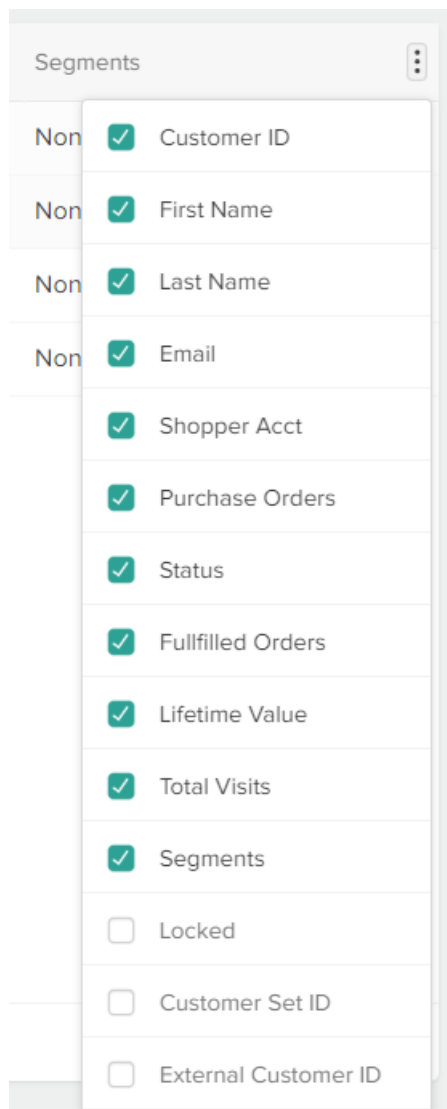
When viewing the list of customers at **Main > Customers > Customers**, you can sort the table by clicking a column header.



Customer ID	First Name	Last Name	Email	Shopper Acct	Purchase Orders	Status	Fulfilled Orders	Lifetime Value	Total Visits	Segments
1000	Sam	Billing	sam.billing@email.com	N	N	Active	0	0	0	None
1001	Example	Customer	example@gmail.com	N	N	Active	0	0	0	None
1002	John	Doe	john.doe@gmail.com	N	N	Active	0	0	0	None
1003	Example	Two	example2@gmail.com	N	N	Active	0	0	0	None
1004	Jane	Doe	janedoe@gmail.com	N	N	Active	0	0	0	None

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

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.



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

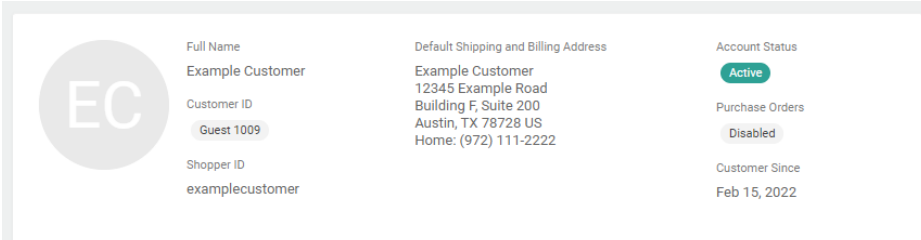
Reset Cancel Filter



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.

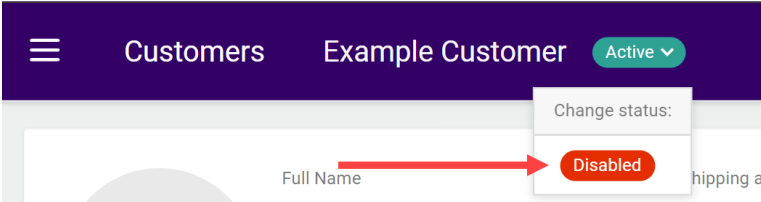
View/Edit Existing Accounts

To view or edit an account, select its entry in the Customers table or click **Edit** from the drop-down menu on the far right. In either case, this will open a details page. The top of the page displays an overview of the customer's lifetime value, the date the account was created, the current purchase order amount, and more.

 <p>Full Name Example Customer</p> <p>Customer ID Guest 1009</p> <p>Shopper ID examplecustomer</p> <p>Default Shipping and Billing Address Example Customer 12345 Example Road Building F, Suite 200 Austin, TX 78728 US Home: (972) 111-2222</p> <p>Account Status Active</p> <p>Purchase Orders Disabled</p> <p>Customer Since Feb 15, 2022</p>	<p>Lifetime Value</p> <p>\$0.00</p>					
	<table border="1"> <thead> <tr> <th>Avg. Order Size</th> <th>Total Visits</th> <th>Fulfilled Orders</th> </tr> </thead> <tbody> <tr> <td>\$0.00</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Avg. Order Size	Total Visits	Fulfilled Orders	\$0.00	0
Avg. Order Size	Total Visits	Fulfilled Orders				
\$0.00	0	0				

Account Status

The account's current status (**Active** or **Disabled**) is also displayed in the top header. To change this status, click the dropdown button and select the new status.

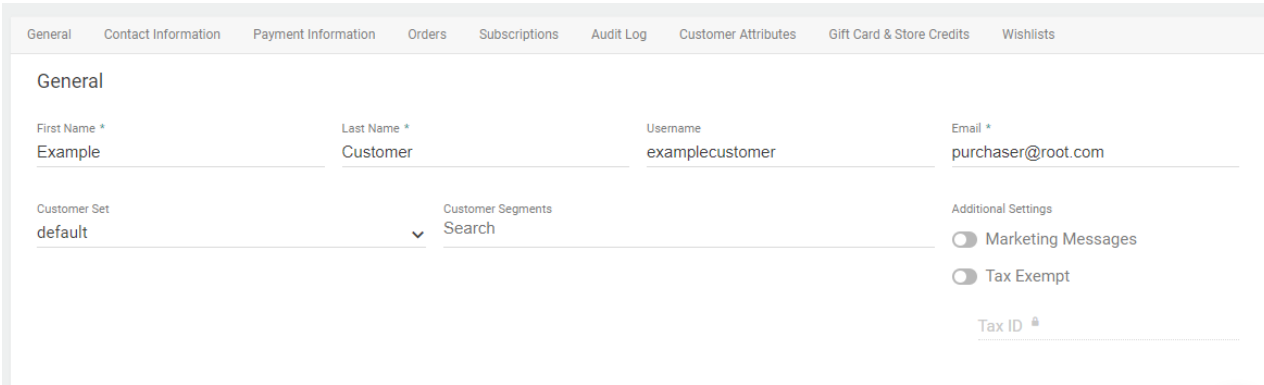


The screenshot shows the top navigation bar with a menu icon, 'Customers', 'Example Customer', and an 'Active' dropdown button. A dropdown menu is open, showing 'Change status:' with a 'Disabled' button highlighted. A red arrow points from the 'Full Name' label to the 'Disabled' button.

General Information

This is the basic information that was set when creating an account, including the name, email (which has a maximum length of 254 characters), tax status, and any [segments](#) or [customer sets](#). See the [Customer Segments](#) and [Customer Sets](#) documentation for more details about creating and assigning those groups. You can edit any of that information (except for the Tax ID) here.

Customer normalization is the recommended way of preventing customers from accidentally creating multiple shopper accounts under the same email address. If you want to use this approach to avoid multiple shopper accounts per email address, you can implement it with an [API Extension application](#).



The screenshot shows the 'General' tab of the customer profile. It contains the following fields:


- First Name *: Example
- Last Name *: Customer
- Username: examplecustomer
- Email *: purchaser@root.com
- Customer Set: default
- Customer Segments: Search
- Additional Settings:
 - Marketing Messages
 - Tax Exempt
- Tax ID #: (empty field)

Contact Information

This section contains all of the available addresses and other contact information that can be used with this customer account. Click the pencil icon next to an Address ID to edit an existing address, or click the X icon to remove it instead.

Contact Information Add New Address

Default Shipping Address ✎ ✕ Sam Billing 12345 Example Rd Dallas, Texas 75201 US Home: (972) 111-0000	Address 1000 ✎ ✕ Sam Billing 1845 Kramer Ln Austin, TX 78758 US Home: (123) 456-7486
--------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------



Click **Add New Address** on the right to create a new contact, which will open the below modal for you to fill out. There is a maximum limit of 20 contacts per account. If a new contact is added when the limit has been reached, then the oldest contact that is not set as the primary billing or shipping address will be deleted and replaced by the new contact.

Customer Contact ✕

First Name * Middle Name Last Name *

Company Name Email * Address Type * ▾

Address *

Address 2 Address 3 Address 4

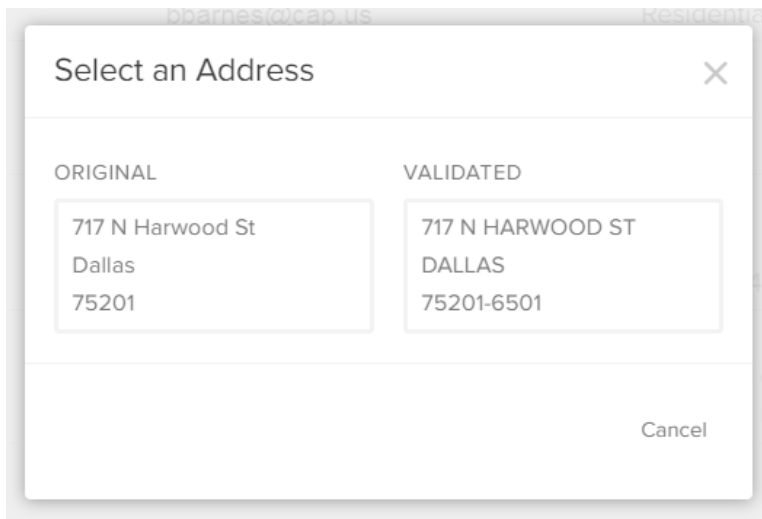
City * State * Zip * Country * ▾

Home Phone Mobile Phone Work Phone

Billing Address Shipping Address

Validate Address Cancel Confirm

While doing so, you can click **Validate Address** to analyze the input. The Kibo Composable Commerce Platform will provide you with an automatically edited version that may be selected for use. This validation may capitalize words, expand the zip code, or otherwise standardize the formatting.



Payment Information

The payment information includes settings for the credit limit and overdraft allowance, and displays the current available purchase order balance of the account. A history of all purchase order transactions is also included. For more information, see the [Customer Purchase Orders](#) guide.

Payment Information

Purchase Orders 🔴

CUSTOMER SETTINGS

Credit Limit *	Overdraft Allowance * ●	Available Balance	Automation_Sandbox_Base Payment Terms *
\$1,000,000.00	Amount ▼ \$99,999.00	\$999,177.95	30 x Search

PURCHASE ORDERS TRANSACTION LOG Export

Date	Site	Order Number	Order Type	PO#	Author	Transaction Details	Amount	Balance	
Mar 23 2021 6:34...	Automation_Sandb...	367	Offline	1	Kibo admin	Payment Collected	\$21.78	\$999,177.95	
Mar 23 2021 6:24...	Automation_Sandb...	367	Offline	1	Kibo admin	Payment Requested	(\$21.78)		

Displaying 1 - 38 of 38

Orders

The order history displays all orders that have been submitted by this account. Either click an order in the table to view its details in the Orders UI or expand the dropdown menu on the far right and click **View Order**.

Orders

Order Number	Order Date	Order Amount	Status	
17	Feb 15 2022 1:09pm	\$26.00	Cancelled	

Displaying 1 - 1 of 1

Subscriptions

This section displays all [subscriptions](#) that have been created for this account, regardless of whether they are currently active or not. Click a subscription in the table to view its details, or expand the dropdown menu on the right to perform other actions. See the [Manage Subscriptions guide](#) for more information about these actions.

Subscription Number	Start Date	Frequency	Next Order Date	Subscription Amount	Status	
25	Jan 27 2023	15 Day	Feb 14 2023	\$65.39	Active	
24	Jan 25 2023	15 Day	Feb 11 2023	\$114.75	Active	Edit Subscription
23	Jan 25 2023	15 Day	Feb 9 2023	\$128.58	Active	Order All Items Now
22	Jan 25 2023	15 Day	Feb 9 2023	\$76.30	Active	Pause Subscription
21	Jan 24 2023	15 Day	Feb 8 2023	\$383.20	Active	Skip Subscription
20	Jan 24 2023	15 Day	Feb 8 2023	\$383.20	Active	Cancel Subscription
19	Dec 19 2022	15 Day	Feb 17 2023	\$417.03	Active	

Audit Log

The audit log provides an audit history for the Purchase Order account settings.

Date	Event	User	
Mar 6 2021 5:14am	Payment Term Change	Kibo admin	
Mar 6 2021 5:01am	Overdraft Allowance Type Change	Kibo admin	
Mar 6 2021 5:01am	Overdraft Allowance Change	Kibo admin	
Mar 6 2021 5:01am	Purchase Orders Enabled	Kibo admin	
Mar 6 2021 5:01am	Line of Credit Change	Kibo admin	

Displaying 1 - 5 of 5

Customer Attributes

This section displays any available customer attributes and allows you to select a value for this account. See the [Customer Attributes documentation](#) for more details.

Customer Attributes

Sex

Male ▼

Gift Card & Store Credits

This sections displays any gift cards and store credits that have been created for this account and information on the issued amount, current balance, activation and expiration date. For more information, see the [Store Credit and Gift Cards guide](#) in the Order Payment category.

Gift Card & Store Credits					
Code	Type	Issued Amount	Current Balance	Activation Date	Expires On
17ecd5f8bc0f46c1	StoreCredit	\$118.00	\$118.00	Jul 20 2022 12:01pm	

Displaying 1 - 1 of 1

Wishlists

If the customer has created any wish lists, those lists are displayed in the final section with the title and creation date.