

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](#).

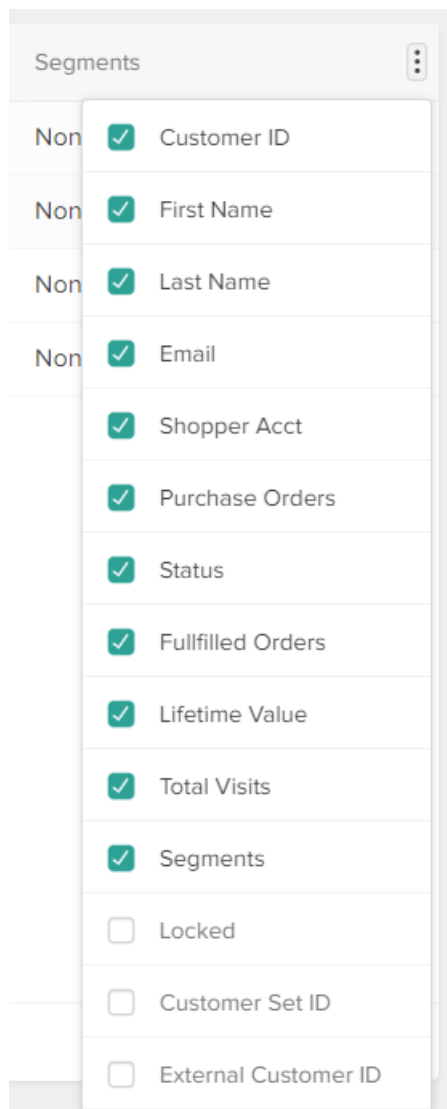
Customers Grid

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

Customers										
Search										
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	jane.doe@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

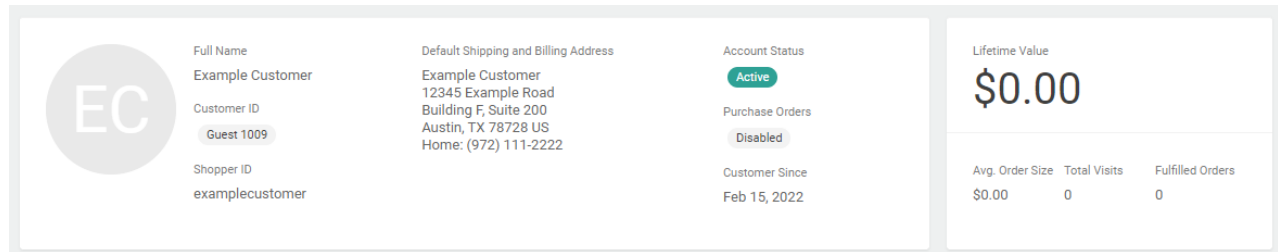
Filter

i 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 dropdown 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.

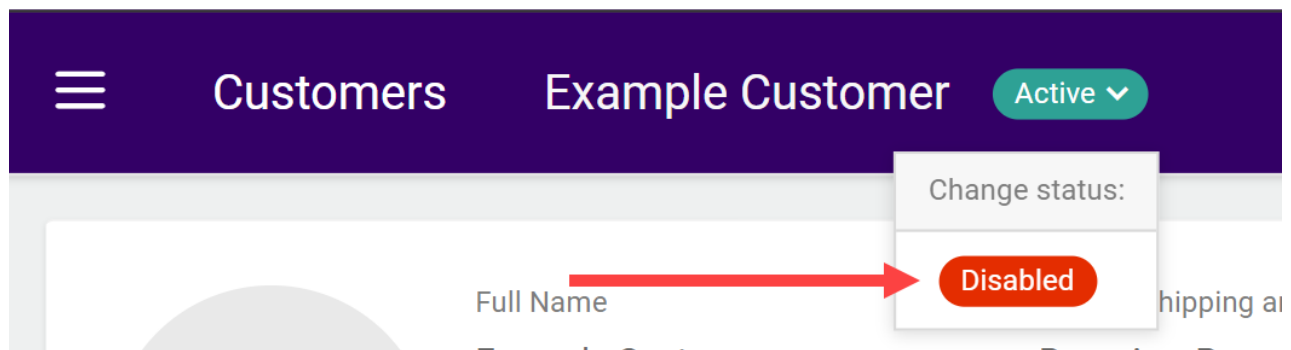


A customer details overview card with a light gray background. It contains several sections: a circular profile picture placeholder with 'EC' inside; a 'Full Name' field with 'Example Customer'; a 'Customer ID' field with 'Guest 1009'; a 'Shopper ID' field with 'examplecustomer'; a 'Default Shipping and Billing Address' field with 'Example Customer', '12345 Example Road', 'Building F, Suite 200', 'Austin, TX 78728 US', and 'Home: (972) 111-2222'; an 'Account Status' field with a green 'Active' button; a 'Purchase Orders' field with a gray 'Disabled' button; a 'Customer Since' field with 'Feb 15, 2022'; a 'Lifetime Value' field with '\$0.00'; and a table with three columns: 'Avg. Order Size' (\$0.00), 'Total Visits' (0), and 'Fulfilled Orders' (0).

Lifetime Value	
Avg. Order Size	\$0.00
Total Visits	0
Fulfilled Orders	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.



A screenshot of the customer details page header. The header is dark purple with a white hamburger menu icon on the left. The text 'Customers' and 'Example Customer' is in white. On the right, there is a green 'Active' button with a dropdown arrow. A dropdown menu is open, showing 'Change status:' and a red 'Disabled' button. A red arrow points from the 'Full Name' field to the 'Disabled' button. The background of the page is light gray.

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](#).

General

Contact Information

Payment Information

Orders

Subscriptions

Audit Log

Customer Attributes

Gift Card & Store Credits

Wishlists

General

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

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.

Select an Address

ORIGINAL

717 N Harwood St
Dallas
75201

VALIDATED

717 N HARWOOD ST
DALLAS
75201-6501

Cancel

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 *
\$1,000,000.00

Overdraft Allowance * ●
Amount ▼ \$99,999.00

Available Balance
\$999,177.95

Automation_Sandbox_Base Payment Terms *
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 6:34...	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.

Subscriptions

🔍 Search Subscription Number or External ID

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	⋮
23	Jan 25 2023	15 Day	Feb 9 2023	\$128.58	Active	⋮
22	Jan 25 2023	15 Day	Feb 9 2023	\$76.30	Active	⋮
21	Jan 24 2023	15 Day	Feb 8 2023	\$383.20	Active	⋮
20	Jan 24 2023	15 Day	Feb 8 2023	\$383.20	Active	⋮
19	Dec 19 2022	15 Day	Feb 17 2023	\$417.03	Active	⋮

- Edit Subscription
- Order All Items Now
- Pause Subscription
- Skip Subscription
- Cancel Subscription

Audit Log

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

Audit Log

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.