

Manage Customer Sessions

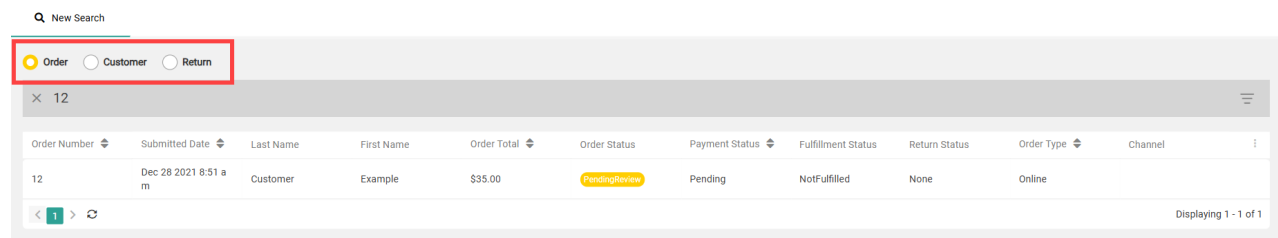
CSRs can quickly search for orders, customers, and returns directly from the Call Center and perform actions on them on the same page. This streamlines the resolution process by eliminating the need to switch between the separate Orders, Customers, and Returns UIs.

Multiple customer interactions can also be managed simultaneously by grouping related tasks within sessions, improving the service workflow and reducing the time spent on calls.

Search Tools

Use the radio buttons at the top of the search landing page to indicate whether you want to search for a customer, order, or return. Then, enter a query into the search bar.

- Expand the filter menu on the search bar to open the Advanced Search options. These include all of the filters currently supported on the individual [Customer](#), [Orders](#), and [Returns](#) dashboards.
- Reorder the results by clicking the column headers to sort results by that value.
- Customize which columns are displayed in the search results table by expanding the menu in the top right corner and toggling columns on or off.



Create New Session

Sessions are created automatically as you look up a new request. To begin a session:

1. Click **Start New Call** if you are not already on the search landing page.
2. Perform a search for a customer, order, or return using the radio buttons.
3. Click any result. The session will appear in the left-hand sidebar using the customer's name.

The screenshot shows a customer session for 'Will Smith'. The top navigation bar includes a search icon and the text 'New Search' and 'Will Smith'. A sidebar on the left contains a 'Start New Call' button and a tab for 'Will Smith'. The main content area is titled 'Orders #12 (Processing)'. It features a table with columns for 'Payment', 'Fulfillment', 'Order Date', and 'Channel'. The 'Payment' section shows 'Order Total: \$174.60', 'Pending: \$174.60', 'Collected: \$0.00', and 'Balance: \$174.60'. The 'Fulfillment' section shows 'Items: 4' and 'Remaining: 0'. The 'Order Date' section shows 'Order Date: 06/10/2022 10:45 am' and 'Last Updated: 06/10/2022 10:53 am'. The 'Channel' is 'Offline Order'. Below the table, there are sections for 'Addresses: Change Address', 'Billing Address', and 'Shipping Address', each with a 'Change Address' link. The 'Billing Address' and 'Shipping Address' both list 'Will Smith' at '601 University Dr, San Marcos, TX 78666 US, 888-888-8888' with email 'Smith.will@test.com'.

You can have up to a maximum of four active sessions, and attempting to create a fifth will replace the oldest one. Once you have completed all of a customer's requests, close the session by clicking the **X** in the sidebar.

Session Tabs

While viewing a session, click **New Search** to the left of the current tab. This will display the search page where you can input another query. Clicking on a result will open it in a new tab within that same session, but be aware that clicking a different order, customer, or return will replace the previous order, customer, or return tab respectively.

For instance, the below session contains tabs for the customer's details (John Smith), one of their orders (#123), and a return (#12). You can create up to a maximum of four tabs per session.

The screenshot shows a 'Call Center' interface for a customer session with 'John Smith'. The top bar includes a search icon and the text 'New Search' and 'John Smith'. A sidebar on the left contains a 'Start New Call' button and a tab for 'John Smith'. The main content area is titled 'Customers John Smith (Active)' and includes 'Cancel' and 'Save' buttons. Below this is a customer profile card with a circular avatar containing 'JS'. The card contains the following information: Full Name (John Smith), Address (No address), Account Status (Active), Lifetime Value (\$0.00), Customer ID (Shopper 1002), and Shopper ID (primaryemail@shopper.com). Below the card is a navigation bar with tabs: General, Contact Information, Payment Information, Orders, Audit Log, Customer Attributes, Gift Card & Store Credits, and Wishlists. The 'General' tab is selected, showing fields for First Name (John), Last Name (Smith), Username (primaryemail@shopper.com), and Email (primaryemail@shopper.com). There are also sections for Customer Set (default), Customer Segments (Search), and Additional Settings (Marketing Messages, Tax Exempt, and Tax ID).

Manage Customers, Orders, and Returns

Once you are viewing customer, order, or return details, then you can perform management actions on them the same manner as their respective UIs. See the following guides for more

context:

- [Manage Customers](#)
- [Manage Orders](#)
- [Manage Returns](#)



You can only update existing orders within the Call Center. New orders should be created directly in [the Orders UI](#) instead.