About Customers

Overview

Channels automatically generate customer information for each store's orders, allowing you to select a store, search and filter customers by name and email, access detailed customer and order information, delete customer records, and export customer data in Excel or CSV formats.

Accessing the Customers Page

To access the orders page, click the "Customers" button located in the left-hand menu.



Explaining the Features of the Customers Page

Customer information will be automatically generated on this platform for every order created through a store. To get started, select a specific store from the top-right corner of the page. Once you've made your selection, all the customers associated with that store will be listed below.

To manage your customers more effectively, you can use the search and filtering options located at the top left of the screen. This feature allows you to search and filter customers based on their names and email addresses.

Directly below, you'll find the names and email addresses of the customers. Clicking the edit icon will provide you with comprehensive customer details, including a breakdown of the orders linked to this customer. This section also displays channel information, specifying the platform from which the order originated. You'll have access to order-specific details, such as the number of items, order status, order date, synchronisation status, and fulfillment status. Clicking the edit button for individual order entries will navigate you to the detailed order information page.

On the other hand, if you wish to delete a customer record, click on the trash bin icon, and you will be prompted with a confirmation screen.

Located in the top-right corner of the page is the "Export Customer Data" button. Clicking this button will trigger a dropdown menu. Here, you can select the option to export customer data for the chosen store in either Excel or CSV format. After making your selection, the system will notify you that the export is in progress, and you will receive a download link via your provided email address.



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