

# Managing Customer Information

When editing a Customer, you will be able to update personal details, view Loyalty scheme information, payments on account, delivery addresses and their order history, as well as adding and review Notes, merging customers or deleting their records completely.

## Customer Details

Field	Purpose
Title	<i>Enter the Customer's Title</i>
First name	<i>Enter the Customer's First name</i>
Surname	<i>Enter the Customer's Surname</i>
Address 1	<i>Enter the Customer's Address</i>
Address 2	<i>Enter the Customer's Address</i>
Town	<i>Enter the Customer's Town</i>
County	<i>Enter the Customer's County</i>
Postcode	<i>Enter the Customer's Postcode</i>
Country	<i>Enter the Customer's Country</i>
Email address	<i>Enter the Customer's Email address</i> <i>Mandatory</i>
Telephone	<i>Enter the Customer's Telephone</i>
Alternate Phone	<i>Enter the Customer's Alternate Phone</i>
How did you find us?	<i>Choose from a drop down list; this is populated in <a href="#">Site Settings</a></i>

## Resetting a Customer Password

If a Customer is unable to login to their account, you may reset their password. This will generate an email, which will be sent to their Email Address, and will contain a new password.

This is a potential GDPR risk, and should only be done if you have verified the Customer's identity and that they have access to that Email Address

## Mailing Preferences

Use this section to update a Customer's contact preferences. This will show a complete list of all Customer Groups which are set up in the CMS.

Simply update the tick boxes as required.

The Customer will be prompted to confirm this subscription prior to their email address being sent to a third party marketing service

## Unsubscribing a Customer

If you need to unsubscribe a Customer, click the button to 'unsubscribe from all and opt out'.

## Loyalty

This tab will show a summary of the Customer's Loyalty Points; these are based on the [Loyalty Scheme](#) as defined in [Site Settings](#).

The Customer's total Loyalty balance will be displayed at the top of the screen:

Mr Mike Whitman has **1297** Loyalty points worth **£12.97**

## Loyalty Account Code

The Customer's Loyalty Account Code is displayed here. If you are using physical gift cards, this can be edited to match the number on a card.

Best practice would be to have blank cards with barcodes, and when a Customer registers, select this field and scan the barcode. This will update the number, which can then be saved. When searching for a Customer in the POS, it is possible to then scan that barcode into the Customer search field.

## Add Loyalty Points

If you need to add Loyalty Points, this can be done manually from the Customer account screen on this tab. When adding points, the user will be prompted to add a comment.

# Loyalty Points History

This table shows a complete history of current Loyalty Points, where they have been earned or manually added, and whether they have been spent.

Loyalty Points expire after one year, and so older records will be removed

# Account

Use this tab to control Account setup.

Field	Purpose
Account Type	Choose between <a href="#">Trade</a> and <a href="#">Retail</a>
Account Code	Enter an Account Code  <i>This is typically used to link to a third party system, e.g. an Accounting Package</i>
Price List	Select a <a href="#">Price List</a> for this Customer to use
Free Delivery	If toggled to 'yes', this Customer will never pay for delivery
Global Discount	Set a global discount for this Customer, which will be applied to all Sales Orders  <i>This is set as a percentage</i>
Company	Enter a Company Name for this Customer
Company Number	Enter a Company Number for this Customer
VAT Number	Enter a VAT Number for this Customer
Active	If set to 'no', this Customer will not be able to access their account  <i>New Trade account registrations will automatically be set to inactive</i>

# Account Payments

Use this screen to manage payments on account.

This section is often used in conjunction with an Accounts integration; these third party systems often manage credit limits and balances, as well as ongoing payments

## Account Summary

The Customer's outstanding balance is shown at the top of this Tab.

The balance is also output on the Customer summary screen

It is possible for a Customer to have either a negative or a positive balance

## Setup

Toggle the tick box to allow this Customer to make payments on account. If set to 'Yes', this Customer will be able to use this option online and in store.

## Add Account Payment

Use the controls here to add an Account Payment. The User can also add a comment regarding that payment, which will be logged.

## Account Payments History

View a history of the Account Payments for this customer.

### Account Payments History

Type	Amount	Date	Order	Comments
Credit	2000.00	16/12/2025 21:33:29		overpayment
Credit	50.00	16/12/2025 21:33:20		cash
Debit	-1563.70 GBP	16/12/2025 21:33:06	<a href="#">Z4785</a>	ACCOUNT

## Delivery Addresses

Use this tab to view and update the Customer's delivery addresses.

You can also change their primary address here.

You can also delete addresses as required.

## Sales Order History

Use this tab to view a complete history of the Customer's Sales Orders

## Notes

Use this tab to view and add Customer Notes.

This is part of the CRM, and to add a Note or Task, you can click [here](#) for more information.

## Duplicate Accounts

Use this tab to manage Duplicate Accounts.

Your system will flag potential duplicate accounts, and give you the option to merge them.

All merged accounts will be merged into the current record, so ensure that you are on the primary Customer before merging

When merging accounts, recommendations will be made if multiple accounts have matching Surnames and Postcodes, or if they have matching Email Addresses.

## Delete

For GDPR compliance, your customer has the "right to be forgotten". It will remove any mention of the customer from your website and is irreversible, so please use it with care.

If you don't have a valid reason to retain this data, you can remove personal information using the button below.

It will remove all references to name, all billing and delivery addresses, their email address, telephone number and company (if applicable). In addition, it will anonymise all orders, reviews, stock notification requests, loyalty information, search history and other activity. They will also be removed from all groups and their wish lists will be deleted.

It is not possible to remove Customer data until all Sales Orders have been fulfilled.

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Revision #4

Created 16 December 2025 21:08:13 by Mike

Updated 18 March 2026 14:46:22 by Mike