Customer Management Overview

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Overview

Sellercloud's **Customer Management** tools help you manage your customers more efficiently, including wholesale customers. Customer management is located under the **Customers** tab.

Customer Management Basics

- When orders are created or brought into Sellercloud, customer profiles are created or existing customers are updated. The primary profile component is the email address.
- All orders created from the customer's email address are stored in the customer's **Orders** tab. On an **Order Details** page, the number of orders placed by a customer will display next to the customer's email address.
- A customer may have multiple addresses, stored on the **Addresses** tab. You can select them from a dropdown when creating an order using the customer's profile.
- Default shipping methods can be selected for customers on the **Shipping references** tab.
- All outgoing emails are logged and show the outgoing email address, subject title, date and time of when the email was sent, and which template, if any, was used in the email.
- Wholesale customers have a Wholesale Prices tab for special pricing. SKU pricing can be set to a date range. You can bulk-update products by downloading the template and importing.
- Custom invoice notes can be created for each customer using the **Invoice Notes** field on the **General Settings** tab. The message will appear on invoices generated for that customer below the item grid.
- You can also merge existing customers.

Related articles

- Customer Accounts Configuration
- Wholesale Customer Overview
- Third-Party Billing to Wholesale Customer Account
- Merge Customers