

Customer Accounts Configuration

04/30/2025 3:09 pm CDT

Overview

You can create an account for every customer. Each account holds important information, including contacts, addresses, and shipping. This powerful tool offers search options and marketing solutions. It also simplifies phone or email orders by automatically entering customer information and creating an order history.

You can create customer accounts manually or in bulk.

Create Customer Accounts Manually

To manually create an account:

1. Go to **Customers > Manage Customers** > Click on the **Add** icon at the lower-right corner. From this page, you can use the default or custom filters to find specific customers.
2. Select **Retail** or **Wholesale**.
3. Select the **Company** from the drop-down menu and populate the other fields.

CREATE NEW CUSTOMER ✕

Retail Wholesale

Company * Test Company ▼

First Name * *First Name*

Last Name * *Last Name*

Email * *email@domain.com*

Business Name *Corporate Name*

Phone *(123) 123-1234*

CANCEL SAVE

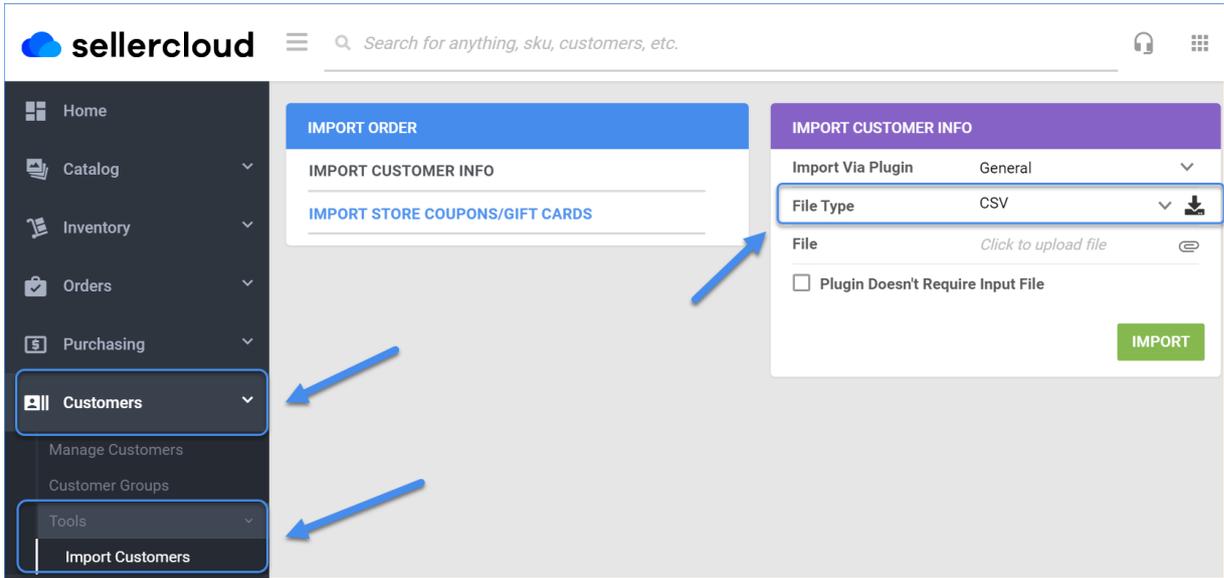
4. Press **Save**. You will be redirected to the **Customer Details** page, where you can click **Edit** or add more information.

Import Customer Accounts in Bulk

Importing customer accounts to Sellercloud saves you time by letting you upload customer information in bulk. You can import a list of customers with their addresses, mark customers as wholesale, and more.

To import customer accounts:

1. Go to **Customers > Tools > Import Customers**.
2. Select a **File Type** > Click the **Download** icon to download a template file.



3. Enter your information into the template.
 - o **Required for non-wholesale customers:** Fill in the customer's **FirstName** and **LastName**.
 - o **Required for wholesale customers:** Fill in the customer's **BusinessName**.
 - o **Required for all customers:** Fill in the customer's **Email**.
 - o To mark a customer as wholesale, enter **1** or **True** into the **IsWholeSale** column.
 - o To mark a customer as tax-exempt, enter **True** into the **TaxExempt** column. To mark them as not tax-exempt, enter **False**.
 - o To add a customer to a group, enter the appropriate group name into the column **UserGroupName**.
 - o To allow unpaid orders to be shipped for that customer, set the **AllowShippingUnPaidOrders** column to **True**. By default, this option is set to **False**.
 - o To remove all old addresses of a customer, enter **DeleteAddresses** into the **Action** column. If there are new addresses in the input file, those addresses will be saved.

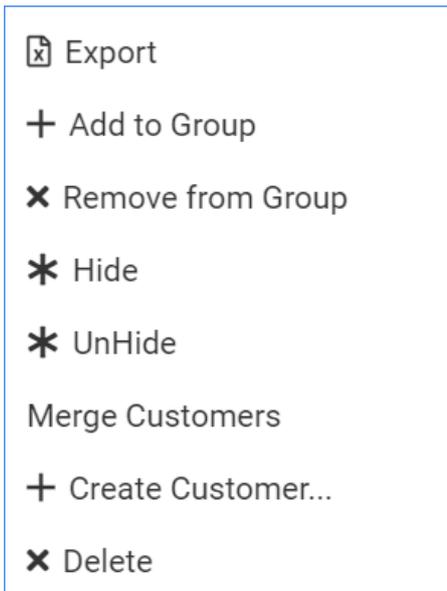
	A	B	C	D	E	F	G	H	I
1	Email (required)	EmailCC	FirstName	LastName	BusinessName	IsWholeSale	Street1	Street2	Action
2	brandon.t@domain.com		Brandon	Tate			Los Angeles, California	DeleteAddresses	
3									
4									

4. Save the file.
5. In Sellercloud's **File** field, select the file, and click **Import**.

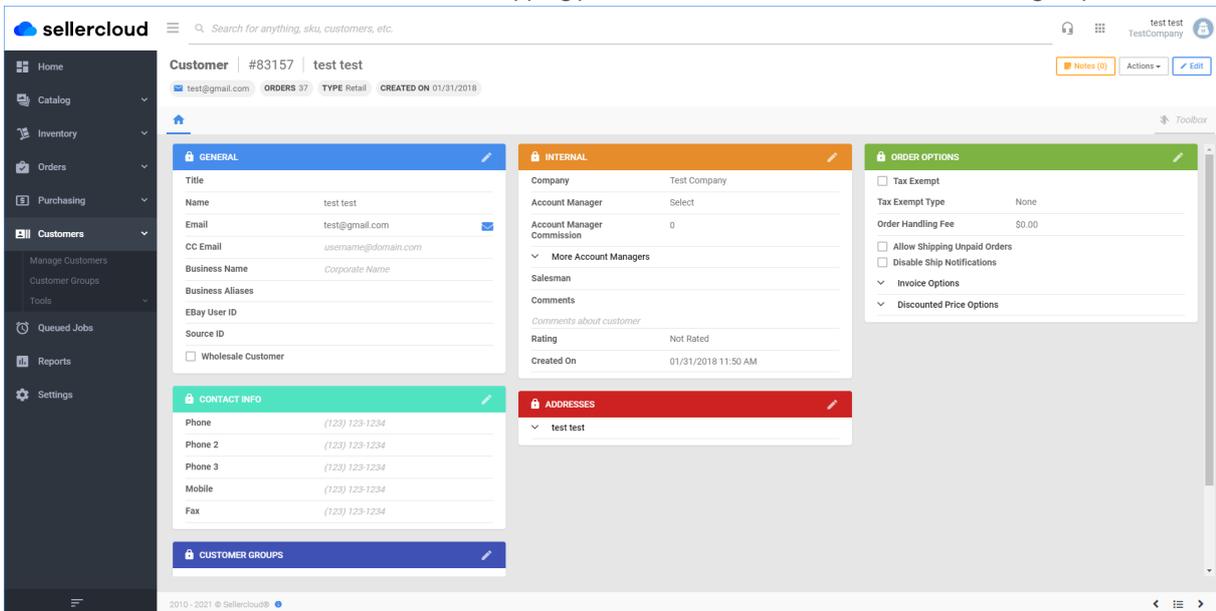
Manage Customers

You can export customer information, add customers to groups, hide and unhide (using the **Include Hidden Customers** filter), merge, create, and delete customers. These options become available when you go to **Customers > Manage**

Customers > Select the IDs > Click on the Action menu at the lower-right corner.



You can also access the **Customer Details** page by clicking on an ID. The **Customer Details** page allows you to view and edit individual customer information, such as shipping preferences, contact information, and user groups.



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Manage Customers and Customers Details

The Manage Customers page lets you manage all your customers. You can perform a number of actions on this page, such as:

- Add customers to groups
- Export customer information

- Merge customers
- Access the Customer Details page

The Customer Details page lets you view and edit individual customer information, like:

- Shipping preferences
- Contact information
- User groups

To access the Manage Customers page:

1. Go to the **Customers** tab. You can filter your search here to find specific customers.[Show me a sample page.](#)
 2. From this page, you can check customers and navigate to the **Action** menu to perform individual or bulk actions.
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To access the Customer Details page:

1. From the Manage Customers page, you can click **Edit** to edit a customer's information. You will be redirected to the Customer Details page. [Show me a sample page.](#)
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Create a customer account

You can create a customer account in two ways:

- Manually create an account
- [Import customer accounts in bulk](#)

To manually create an account in Alpha:

1. Hover over the **Customers** tab > Click **Add New Customer**.
2. **Email**, **First Name**, and **Last Name** are required fields > **Save**. You will be redirected to the [Customer Details](#) page, where you can continue to add information.

Home > Customers List > New Customer Create new Order

Last Modified On:

E-mail Address:

CC E-mail:

Title:

First Name:

Middle Name:

Last Name:

Business Name:

Warehouse Region:

User Source UserID:

Company:

Account Manager:

Account Manager Commission:

Account Manager:

Account Manager Commission:

Account Manager:

Account Manager Commission:

User Group(s):

Add user to Group:

Copy Security From:

Is SKUStack User

WholeSale User

Allow shipping unpaid orders

Tax Exempt

Send invoice with Shipping Notification Email

Cost Plus Based WholeSale Price Enabled

Cost Plus Based WholeSale Price %:

Cost Plus Based WholeSale Price using:

Wholesale Price Based Discount: %

SitePrice based Discount: % Discount Enabled

Tax Exempt Type:

Comments:

Invoice Notes:

Sales Man:

Sales Man Commission:

Phone 1: Use with shipping

Phone 2:

Phone 3:

Mobile: (Valid for US (Phone) only) Send Test SMS

Fax Number:

Order PDF Invoice Plugin:

Order Handling Fee:

Import customer accounts

Importing customer accounts to Sellercloud saves you time by allowing you to upload customer information in bulk. You can import a list of customers with their addresses, mark customers as wholesale, and more. Simply download a file template, populate the fields, and upload it into Sellercloud.

To import customer accounts:

Home > Customers List > Import Customers

Select file: No file chosen

File Type:

Import via Plugin:

Plugin doesn't require input file

1. Go to Customers > Import Customers.
2. Select a File Type > Click Download Template to download a template file.

3. Enter your information into the template.

- **Required for non-wholesale customers:** Fill in the customer's **FirstName** and **LastName**.
- **Required for wholesale customers:** Fill in the customer's **BusinessName**.
- **Required for all customers:** Fill in the customer's email in **Email**.
- Enter **1** or **True** into the **IsWholeSale** column to mark a customer as wholesale.
- Enter **True** into the **TaxExempt** column to mark a customer as tax-exempt. Enter **False** to mark them as not tax-exempt.
- Enter the appropriate group name into the column **UserGroupName** to add a customer to a group.
- The column **AllowShippingUnPaidOrders** is set to **False** by default. If set to **True**, it will allow unpaid orders to be shipped for that customer.
- To remove all old addresses of a customer, enter **DeleteAddresses** into the **Action** column. If there are new addresses in the input file, those addresses will be saved.

4. Save the file.

5. Click **Select File** > Select the file > **Upload Customers**.
