

# Your customers

## Your customers

The first page under the "Customers" menu gives you a list of all the registered users on your shop.

ID	Title	Last name	First Name	Email address	Sales	Enabled	News.	Opt.	Registration	Last visit	Actions
2	Mrs.	Doe	Jane	jane@example.com	--	✓	✗	✗	03/25/2014	--	Edit
1	Mr.	DOE	John	pub@prestashop.com	\$349.32	✓	✓	✓	03/21/2014	03/24/2014 06:02:19	Edit

This gives you a bird's eye view of your customers, with some details thrown in which you can use to sort and search accounts:

- **Title.** Customers can declare their social title, which are matched with a genre and can help you better customize your customers' experience. There are three default social titles (Mr., Ms., and Miss), but you can create more in the "Titles" page under the "Customers" menu.
- **Age.** Knowing the age of your customers can also help you better target your demographics, and choose to sell products that appeal more to them.
- **Enabled.** Indicates whether the customer is active or not. You can disable an account by clicking on the green "Yes".
- **News..** Indicates whether the customer is subscribed to your shop's newsletter or not. You can unsubscribe from it by clicking on the green "Yes".
- **Opt..** Indicates whether the account has accepted to receive e-mails from your partners or not. You can unsubscribe it clicking on the green "Yes". **Do not subscribe a user to these e-mails without their consent, as this is considered spam.**
- Registration date and last visit can always be useful when sorting user accounts.
- **Actions.** You can edit the user's account, simply view it in full (with its messages, orders, addresses, vouchers, etc.), or trash it forever.

**i** When installed for the first time with sample data, PrestaShop has a default user, named John DOE.

You can use this fake user to test some of your shop's features, and generally browse your shop and see it the way a regular user would.

To log in to your shop using this public account, use these credentials:

- E-mail address: [pub@prestashop.com](mailto:pub@prestashop.com)
- Password: 123456789

**Before you open your shop to the public, make sure to delete this default user, or at least change its credentials!** If not, malicious visitors could use it to make fake purchases and more.

Below the customers table is the "Set required fields for this section" button. It opens a form where you can indicate if a database field is necessary or not by checking the appropriate boxes: this way, you can make it so fields such as "newsletter" or "optin" are mandatory when a visitor is creating a customer account on your shop.

You can export a list of your clients by clicking on the "Export" button at the top. You can also import customers using the "Import" button. You will need your CSV file to follow this format:

```
ID;Title;Last name;First Name;Email address;Age;Enabled;News.;Opt.;Registration;Last visit;
2;1;Gorred;Francis;francis@example.com;-;1;0;0;2013-07-04 15:20:02;2013-07-04 15:18:50;
1;1;DOE;John;pub@prestashop.com;43;1;1;1;2013-07-02 17:36:07;2013-07-03 16:04:15;
```

More import options are available in the "CSV Import" page of the "Advanced parameters" menu.

## Creating a New Customer Account

To create a customer account manually, select "Add New". A form appears.

The screenshot shows the 'CUSTOMER' form in PrestaShop. It includes the following fields and options:

- Social title:** Radio buttons for 'Mr.' and 'Mrs.'.
- \* First name:** Text input field.
- \* Last name:** Text input field.
- \* Email address:** Text input field with an envelope icon.
- \* Password:** Text input field with a strength indicator icon.
- Birthday:** Three dropdown menus for day, month, and year.
- Enabled:** Toggle buttons for 'YES' (green) and 'NO' (grey).
- Newsletter:** Toggle buttons for 'YES' (grey) and 'NO' (red).
- Opt-in:** Toggle buttons for 'YES' (grey) and 'NO' (red).
- \* Group access:** A table with checkboxes and a dropdown menu.

<input type="checkbox"/>	ID	Group name
<input checked="" type="checkbox"/>	1	Visitor
<input checked="" type="checkbox"/>	2	Guest
<input checked="" type="checkbox"/>	3	Customer

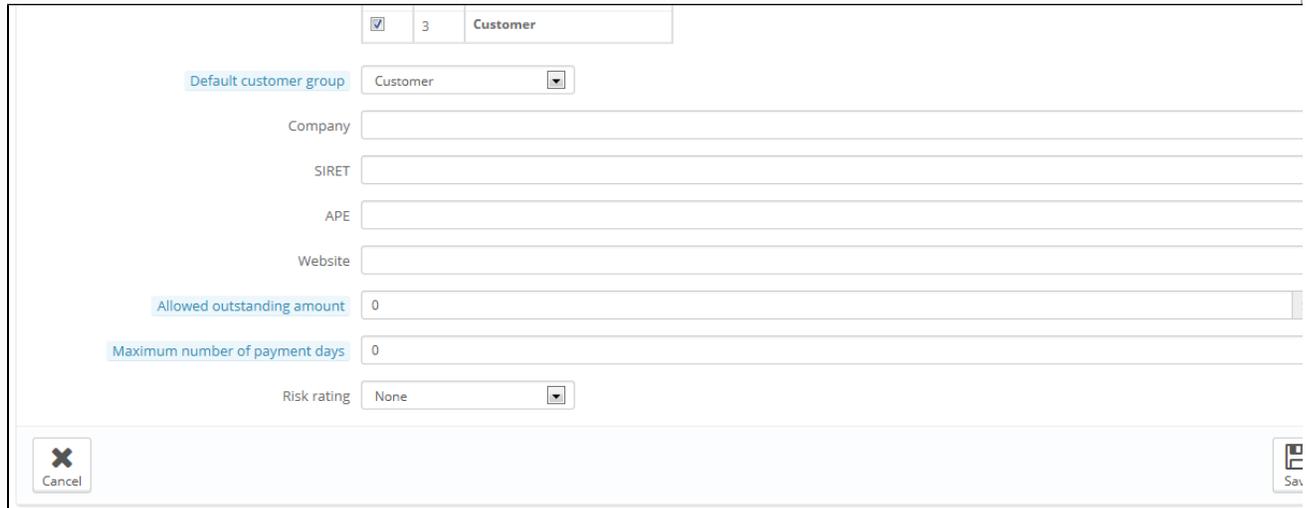
**Default customer group:** Customer (dropdown menu)

Buttons: Cancel (with 'X' icon), Save (with floppy disk icon).

Fill out the customer's information:

- **Title.** Choose between the ones available, or create another one in the "Titles" page under the "Customers" menu.
- **First name, Last name, E-mail address.** Those are essential: the names are used in the confirmation e-mails that PrestaShop sends, and the e-mail address is used for log-in.
- **Password.** Choose a password, at least 5 characters long.
- **Birthday.** This information can be used for birthday e-mails and temporary discounts.
- **Status.** You may wish to create an account, but not have it yet active.
- **Newsletter.** Can be used by the "Newsletter" module, for sending regular information to those customers who requested it.
- **Opt-in.** Can be used by modules for sending regular partner promotions to those customers who requested it. **Do not subscribe a user to these e-mails without their consent, as this is considered spam.**
- **Group access.** Having customer groups enables you to create group discounts. Many other PrestaShop feature can also be group-restricted. You will learn more about group in the "Groups" section of this chapter of the PrestaShop user guide.
- **Default customer group.** No matter how many groups that customer belongs to, s/he should always have one main group.

**i** If your customers are mostly companies, you should enable the B2B mode in order to get additional options: go to the "Customers" page of the "Preferences" menu, and choose "Yes" for the "Enable B2B mode" option.



The screenshot shows a web form for customer preferences. At the top, there is a checked checkbox, the number '3', and a dropdown menu with 'Customer' selected. Below this, the 'Default customer group' is also set to 'Customer'. The form includes several input fields: 'Company', 'SIRET', 'APE', and 'Website'. There are also two numeric input fields: 'Allowed outstanding amount' and 'Maximum number of payment days', both set to '0'. A 'Risk rating' dropdown menu is set to 'None'. At the bottom left is a 'Cancel' button with a red 'X' icon, and at the bottom right is a 'Save' button with a floppy disk icon.

The B2B mode adds a few company-specific fields:

- **Company.** The name of the company.
- **SIRET.** Its SIRET number (France only).
- **APE.** Its principal activity code (*Activité principale exercée* - France only).
- **Website.** Its website.
- **Allowed outstanding amount.** The amount of outstanding money that the company is allowed.
- **Maximum number of payment days.** The number of days that the company is allowed.
- **Risk rating.** Your risk rating of this company: Low, Medium or High.

## Viewing a Customer's Information

In the case where you would like to have more information on a given customer, you can click on the "view" button, located at the end of the row in the customer's list. A new page appears.

JOHN DOE [000001] - PUB@PRESTASHOP.COM Edit

ADD A PRIVATE NOTE

? This note will be displayed to all employees but not to customers.

Save

MESSAGES 2

Status	Message	Sent on
open	Please advise about this product...	03/24/2014 06:02:58
open	Hi, Unfortunately, an item on your order is currently out of stock. This...	03/26/2014 11:31:19

VOUCHERS 0

John DOE has no discount vouchers

LAST CONNECTIONS

Date	Pages viewed	Total time	Origin	IP Address
03/24/2014	0		Direct link	127.0.0.1
03/21/2014	0		prestashop.com	127.0.0.1

ORDERS 5

Valid orders 1 for \$61.37 Invalid orders 4

ID	Date	Payment	Status	Products	Total spent
1	03/21/2014	Payment by check	Delivered	2	\$61.37
2	03/21/2014	Payment by check	Awaiting cheque payment	3	\$0.00
3	03/21/2014	Payment by check	Awaiting cheque payment	3	\$0.00
4	03/21/2014	Payment by check	Payment error	4	\$0.00
5	03/21/2014	Bank Wire	Awaiting bank wire payment	3	\$0.00

CARTS 7

ID	Date	Carrier	Total
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Customer Information:

- Social Title: Mr.
- Age: 44 years old (birth date: 01/15/1970)
- Registration Date: 03/21/2014 10:53:41
- Last Visit: 03/24/2014 06:02:19
- Best Customer Rank: 1
- Language: English (English)
- Registrations:  Newsletter  Opt in
- Latest Update: 03/21/2014 10:53:41
- Status:  Active

The various sections provide you with some key data on the user:

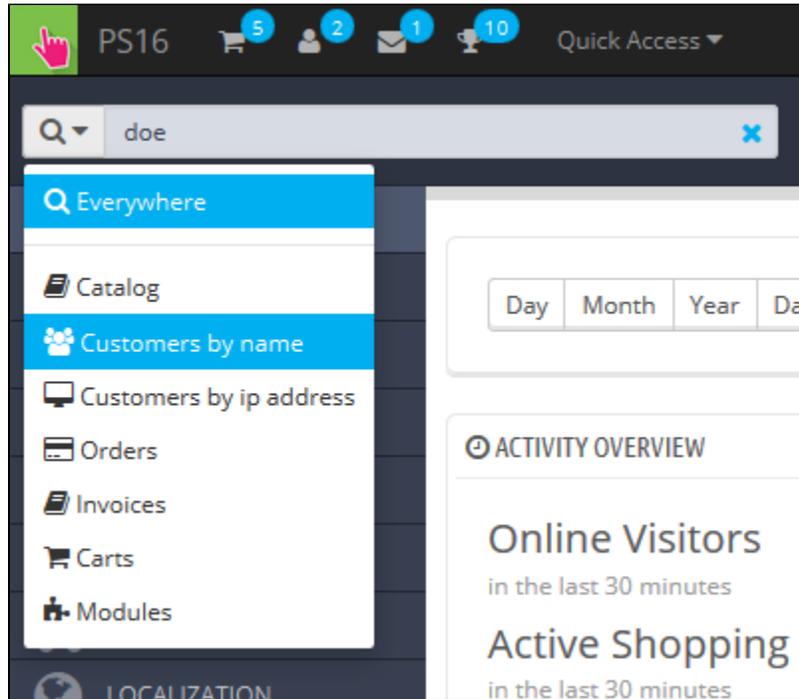
- Customer information, first and last name, e-mail address, ID, sign-up date, date of last visit, rank.
- Information regarding the subscription to the store's newsletter and subscription to ads from partnering companies, the age, date of last update, and whether or not the account is active.
- Private notes from the store's employees (i.e. you or your team).
- Messages sent by the customer to the shop's team (through customer service).
- The groups to which the customer belongs.
- Summary of the customer's past purchases. Amount spent, type of payment, order status. For more information about each order, click on the icon in the "Actions" column.
- Summary of the products that were ordered by a customer. Among other things, this enables you to know when a customer is very fond of a product, and maybe create a special discount for the 10th purchase. Clicking on a product directs to the order to which that product is tied.
- Registered addresses.
- Available vouchers / cart rules.
- Carts that the customers has created (but not necessarily validated) since sign-up. When your customer is currently on your shop, you can see what is being added to the cart in real time.
- Previous connection to the shop.

## Searching for a Customer

Searching for a customer on your PrestaShop shop can be done two different ways.

**The first method** consists of entering the information you have into the PrestaShop search bar, which is found in the top center of your back office. By selecting "everywhere", "by name" or "by ip address", you can perform a search based on:

- ID. The numbers that is assigned to the customer in the database.
- First or last name. Note that you cannot search for both: choose either "john" or "doe", as "john doe" won't work.
- E-mail address.
- IP address. You can search using the IP of the latest connection to your shop.



The results, if any, are then presented: the list presents you with the users' ID, social title, e-mail, birthday, registration date, amount of orders and whether or not the user's account is active. From there on, you can view the whole user's page, or edit its details.

2 results match your query "doe".

1 CUSTOMER

ID	Titles	First Name	Name	Email address	Birth date	Registration date	Orders	Enabled	
1		John	DOE	pub@prestashop.com	01/15/1970	03/21/2014	5		<a href="#">Edit</a>
2		Jane	Doe	jane@example.com	04/21/1977	03/25/2014	0		<a href="#">Edit</a>

**The second method** consists of going to the "Customers" page, and listing all of your customers.

CUSTOMERS > FILTER BY LAST NAME: DOE (2)

ID	Title	Last name	First Name	Email address	Company	Sales	Enabled	News.	Opt.	Registration	Last visit	
2	Mrs.	Doe	Jane	jane@example.com	--	--				03/25/2014	--	<a href="#">Edit</a>
1	Mr.	DOE	John	pub@prestashop.com		\$349.32				03/21/2014	03/24/2014 06:02:19	<a href="#">Edit</a>

Bulk actions

On this page, you can complete the fields at the top of the list, in order to filter it according to the following criteria: ID, social title, first name, last name, e-mail address, age, account status (enabled or disabled), subscription to the newsletter, subscription to partnering ads, registration date, and last connection date. Enter your criteria and click the "Filter" button in the top right-hand corner of the table. You can then sort the list for some of the columns.

Click the "Reset" button to go back to the complete list.