

Portal

Release Update v4.30.50– January 28, 2025

New + Improved

New Export Customers Feature

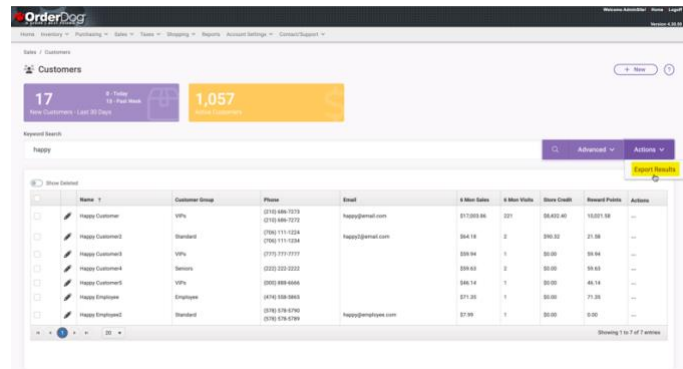
We're incredibly happy to announce that we've added a few new features on the Customers page. One highly anticipated feature is the ability to export any of your customers. The export customers feature gives you the ability to quickly export all your customers or easily export a filtered listing of customers. The export will generate an excel file with the customer's information.

To export all your customers:

1. Go to the Customers page
2. Select the Actions (dropdown)
3. Select Export Results

To export a filtered lists of customers or a single customer:

1. Go to the Customers page
2. Filter the customers using the Keyword Search, Advanced Search, or New Customer widget
3. Select the Actions (dropdown)
4. Select Export Results (any customer displayed will get exported)

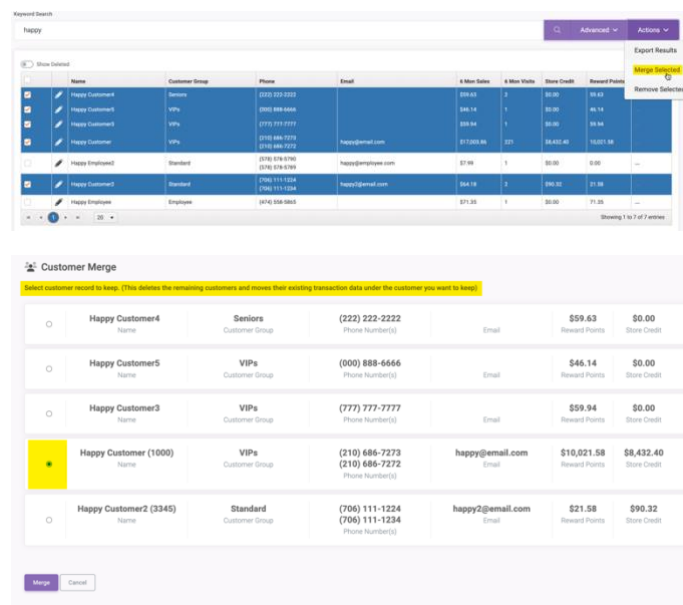


New Merge Customers Feature

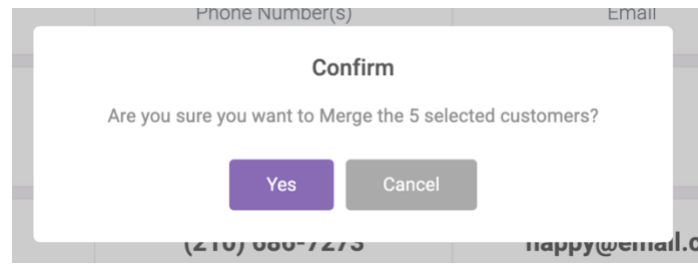
Another highly anticipated customer feature is the ability to merge customers. When customers are merged into a single customer, the sales history, credit balance, and reward points history will all be combined into a single merged customer. And after the merge, the desired customer will remain, and all the others will be permanently removed.

The process of merging customers is incredibly simple:

1. Search for the customers
2. Select the customers (check the box)
3. Select the Actions (dropdown)
4. Select Merge Selected



- Choose the customer record you want to keep that all the others will merge into
- Select Merge (a confirmation popup displays to verify if you want to proceed with the merge)
- Select Yes, the merge runs until it's completed. Once completed, you'll be returned to the Customers page with the desired customer remaining with the updated sales history, etc.



New Mass Delete Customers Feature

In addition to the other highly anticipated customer features, you'll now be able to delete multiple customers at the same time. Any customer that has been deleted using this method can also be reactivated, in case a mistake was made.

The process for performing a mass delete is as simple as:

- Search for the customers
- Select the customers (check the box)
- Select the Actions (dropdown)
- Select Remove Selected (a confirmation popup will display, just to verify you want to proceed)
- Select Yes, the Customers page refreshes with the selected customers automatically removed

