

Using Proxy Customers for Ecommerce Orders

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Overview

For our Ecommerce integrations a lot of customers would rather map all of their orders to a single Customer within Order Time rather than syncing in every single Customer. This is especially true for your Accounting sync when you have a high volume of orders, both the Accounting integration and Order Time can quickly fill up their Customer lists.

Solution

First, use the help article here to create your **Proxy Customers**: [Adding Customers](#)



You can create a **Taxable** and a **Non-Taxable Proxy** and we will use them below. In my example I called one, **Shopify Proxy Customer - Taxable**
The other was, **Shopify Proxy Customer - Non-Taxable**

Click the **cog** in the upper-right corner to go to your **Admin panel**.

Click on **Ecommerce Integration**

Underneath your Ecommerce Integration click on **Configure**

Select the **Preferences** tab

You should now see this:

Admin > ECommerce Integration > ECommerce Integration Editor

Configure Shopify Store

General Preferences Sales Tax Mapping Ship Method Mapping Payment Method Mapping Discount Mapping Schedule

Complete when you do not want each customer to be saved in the accounting customer list.

When the customer is taxable: When the customer is non-taxable:

Also use the selected Customer in OrderTime

When creating customers and addresses

Identify customers by:

Identify address by:

Default Customer Type:

Default Sales Rep:

Truncate Name Fields

Match Item Name With:

Inventory Sync With:

When creating orders

When should the order come in

Web Order Status:

Secondary Web Order Status:

Financial Status:

Sales Channel Filter:

Shopify Status:

When the transaction is created in Order Time

Type:

Initial order status:

Default Location:

Default Class:

Map web order number to:

Place order on hold if greater than:

In the first section simply choose the Proxy Customer for when a customer is taxable and when a customer is non-taxable.



NOTE: You can use the same Proxy for both if you wish!

The next part is the checkbox: **Also use the selected Customer in Order Time**

If checked: The Proxy Customer you have chosen will be assigned to all the orders coming in via your Ecommerce Integration within Order Time instead of creating a new Customer for each Order. (We commonly recommend this)

If unchecked: The Proxy Customer will just be used for your Accounting Customer List, but a new Customer WILL be created for each and every Ecommerce Order

When you are done making your changes within the Ecommerce Configuration, click **Save**.