Using Proxy Customers for Ecommerce Orders

Last Modified on 01/18/2024 9:31 pm EST

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:

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**.