magmodules

Customer Grid

Yuki Integration for Magento 2

This page explains the customer grid in the Yuki Connection for Magento 2. The customer grid shows all customers that have been synced to Yuki as part of invoice or credit memo synchronisation. You don't push customers to Yuki separately - they are created or linked in Yuki automatically when their first invoice is synced. This grid gives you a view of which customers are known to Yuki and how they've been matched.

Location: Accounting -> Data -> Customers

Columns

Column	Description
ID	Internal record ID in the module's database table
Web Site	The Magento website the customer belongs to
Company	Company name from the billing address
Firstname	Customer's first name
Lastname	Customer's last name
Email	Customer's email address
Tax VAT Number	VAT number from the customer account or billing address
Country	Billing country
Created At	Date this customer record was first created in the module
Updated At	Last time this record was updated

The following columns are hidden by default but can be enabled via the column picker:

- Customer ID
- Suffix
- Middlename

How Customers Enter the Grid

Customers are not added to this grid directly. They are created as a side effect of syncing an invoice or credit memo:

1. An invoice or credit memo is synced to Yuki.
2. As part of that sync, the module checks whether the customer already exists in Yuki.

3. If the customer is not yet known, they are created in Yuki and a record is added to this grid.
4. If the customer already exists, the existing Yuki contact is reused and the record is updated if needed.

There is no separate action to push a customer to Yuki - syncing an invoice or credit memo handles this automatically.

Customer Matching

The module uses a combination of customer ID and billing country to determine whether a customer record should be reused or a new one created. If a customer places orders from different billing countries, a separate customer record is created per country. This is intentional - Yuki treats customers per country for tax and reporting purposes.

B2B Customers

For business customers:

- The company name is used as the primary contact name in Yuki.
- The VAT number is synced to Yuki and can be used for EU intra-community transaction validation.
- Make sure the VAT number is correctly filled in the Magento customer account or order billing address before the first invoice syncs.

Need More Help?

Documentation:

- All Help Articles - Complete documentation overview

Support:

- Contact Support - Get help from our team

For a complete overview of features and configuration options, see the Yuki Integration extension on magmodules.eu

All articles for Yuki Integration

Installation

1	Installation using Composer (recommended)
2	Installation using the Adobe Marketplace
3	Install through FTP and SSH

Configuration

1	Configuration Guide
2	OSS Tax Rules
3	Quick Start Guide

Grids

1	Credit Memo Grid
2	**Customer Grid (current)**
3	Invoice Grid
4	Synchronisation Logs

Background

1	Best Practices
2	CLI Commands