



HOW TO
Set Up & Administer
Customers

Revision 1.0



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HOW TO

Set Up & Administer Customers

Introduction

Miva Merchant allows you to build a customer list. With this list, you can maintain customer shipping and billing data. You can also use this list to assign customers to Availability Groups and Price Groups. For more information about Availability and Price Groups refer to: *HOW TO Set Up Availability Groups* and *HOW TO Set Price Groups*.

Use the following procedure to set up and edit Customer information.

1. Click on the triangle next to the store name to open the menu.
2. Click on the Customer link to edit current customer information.






Edit Customer Information

The Edit Customer form is displayed. There are two tabs on the form; Customers and Lost Password Email.


Customers Tab

The screenshot shows the 'Customers' tab interface. At the top, there is a 'Customers' header with a search icon. Below it, there are two tabs: 'Customers' and 'Lost Password Email'. A search box is located to the right of the tabs, with a search button icon. A red line labeled '1' points to the search box. Below the search box is a 'Display:' section with a grid of checkboxes for various fields. A red line labeled '2' points to the 'Display:' label. The fields include: Login (checked), Pass. Recovery Email (checked), Ship. First Name, Ship. Last Name, Ship. Email, Ship. Phone, Ship. Fax, Ship. Company, Ship. Address, Ship. City, Ship. State, Ship. Zip, Ship. Country, Bill. First Name, Bill. Last Name, Bill. Phone, Bill. Fax, Bill. Email, Bill. Company, Bill. Address, Bill. City, Bill. State, and Bill. Country. Below the display options is a blue bar with the text 'Remove Login Pass. Recovery Email' and a document icon. A red line labeled '3' points to this bar. Below the blue bar is a list of customers. A red line labeled '5' points to the first customer's name. Each customer entry has a checkbox and two document icons. A red line labeled '4' points to the document icons. At the bottom of the list, there is a blue bar with the number '14' and a search box with the number '10' and a search button icon.

1. Search for a customer.
 - a. Enter the name, or a partial name into the text box.
 - b. Enter the search criteria into the text box or click the Search  button.
 - c. Those customers that meet the search criteria are displayed.
 - d. Click the check box next the name to assign the customer to the Price Group.
2. This form displays a set of options for each customer. Check the boxes for the options you wish to have displayed on your customer list and click on Update. The checked items are then displayed as text in the customer list. In the above screen, Login, Password, Recovery Email
3. Add a new customer by clicking the New Customer button. Refer to "Add New Customers," on page 5 for additional information about this procedure.
4. Click the Edit Here  button to edit the information that is displayed on this form for an existing customer information, or

Click the Edit  button to edit all information for an existing customer. The following form is displayed. The form has two tabs: Identification and Shipping/Billing Information.

Identification Information

Edit Customer: george 

Identification [Shipping/Billing Information](#)

Login:

Email Lost Passwords To:

Password:

Confirm Password:

Enter the following Identification information:

- Login Enter the name the customer will use as a login name.
- Email Lost Passwords To Enter the email address you will use to send the password if the customer notifies you that it is lost.
- Password Enter the password.
- Confirm Password Confirm the password.

Shipping/Billing Information

Ship To:		Bill To:	
First Name:	<input type="text" value="george"/>	First Name:	<input type="text"/>
Last Name:	<input type="text" value="bancroft"/>	Last Name:	<input type="text"/>
Email Address:	<input type="text" value="george@miva.com"/>	Email Address:	<input type="text"/>
Phone Number:	<input type="text" value="858-490-2570"/>	Phone Number:	<input type="text"/>
Fax Number:	<input type="text"/>	Fax Number:	<input type="text"/>
Company:	<input type="text" value="Miva Corporation"/>	Company:	<input type="text"/>
Address:	<input type="text" value="2629 Ariane Drive"/>	Address:	<input type="text"/>
City:	<input type="text" value="San Diego"/>	City:	<input type="text"/>
State/Province:	<input type="text" value="California"/>	State/Province:	<input type="text" value="Outside US"/>
Other State/Province:	<input type="text"/>	Other State/Province:	<input type="text"/>
Zip/Postal Code:	<input type="text" value="92117"/>	Zip/Postal Code:	<input type="text"/>
Country:	<input type="text" value="United States"/>	Country:	<input type="text" value="<Select One>"/>

Enter the following ship to information.

- First Name
- Last Name
- Email Address
- Phone Number
- Fax Number
- Company
- Address
- City
- State/Province
- Other State/Province
- Country

If the Billing address is different, enter the bill to information.

Lost Password Email Tab

This is the form to set up your message to any customer that requests that his or her forgotten password be sent via email.

From	Enter the email address that the customer can reply to if they have additional inquiries.
CC	Enter any email address that you wish to receive a copy of the email with the password.
Subject	Enter the subject to alert the customer so that they will realize that this is the response to their request.
Header Text	Enter any header text that you want to appear at the beginning of your email.

Add New Customers

The Add Customer form has two tabs: Identification and Shipping/Billing Information.

Identification Information

Add Customer

Identification [Shipping/Billing Information](#)

Login:

Email Lost Passwords To:

Password:

Confirm Password:

Enter the following Identification information:

Login	Enter the name the customer will use as a login name.
Email Lost Passwords To	Enter the email address you will use to send the password if the customer notifies you that it is lost.
Password	Enter the password.
Confirm Password	Confirm the password.

Shipping/Billing Information

Edit Customer: george

[Identification](#) **Shipping/Billing Information**

Ship To:	Bill To:
First Name: <input type="text" value="george"/>	First Name: <input type="text"/>
Last Name: <input type="text" value="bancroft"/>	Last Name: <input type="text"/>
Email Address: <input type="text" value="george@miva.com"/>	Email Address: <input type="text"/>
Phone Number: <input type="text" value="858-490-2570"/>	Phone Number: <input type="text"/>
Fax Number: <input type="text"/>	Fax Number: <input type="text"/>
Company: <input type="text" value="Miva Corporation"/>	Company: <input type="text"/>
Address: <input type="text" value="2629 Ariane Drive"/>	Address: <input type="text"/>
City: <input type="text" value="San Diego"/>	City: <input type="text"/>
State/Province: <input style="border-bottom: none; border-right: none; border-left: none; border-top: none;" type="text" value="California"/> ▼	State/Province: <input style="border-bottom: none; border-right: none; border-left: none; border-top: none;" type="text" value="Outside US"/> ▼
Other State/Province: <input type="text"/>	Other State/Province: <input type="text"/>
Zip/Postal Code: <input type="text" value="92117"/>	Zip/Postal Code: <input type="text"/>
Country: <input style="border-bottom: none; border-right: none; border-left: none; border-top: none;" type="text" value="United States"/> ▼	Country: <input style="border-bottom: none; border-right: none; border-left: none; border-top: none;" type="text" value="<Select One>"/> ▼

Enter the following ship to information.

- First Name
- Last Name
- Email Address
- Phone Number
- Fax Number
- Company
- Address
- City
- State/Province
- Other State/Province
- Country

If the Billing address is different, enter the bill to information.