

https://verifone.cloud/docs/online-payments/pay-link/customer-catalog

Updated: 21-Mar-2025

Customer catalog

Overview

The **Customer Catalog** feature allows merchants to add and edit customer information, making it easily reusable while creating Pay By Links. This saves a lot of time and effort while creating the payment link.

This feature is available only on request. If you are interested in using the *Customer Catalog*, contact your Verifone representative.

Availability

To check which roles can add / edit / remove a customer or see the customer catalog list check our <u>Users and</u> merchants roles documentation.

Add new customer

To be able to reuse the customer information while creating a Pay by Link, follow the below steps to create the customer and store it in Verifone Central.

1. Go to Commerce > Payment tools > Customer Catalog.



Commerce

Optimize commerce operations with a comprehensive suite of payment tools, designed to streamline transactions and maximize revenue. Stay on top of financial performance with detailed reporting on sales and revenue, and never miss a payment with reliable payment deliverables.

Reporting

Payments Dashbo

Orders/Transaction

3D Secure Authen

Settlements

Report Scheduler

Generated Report

Audit Log

2. Click on Add new customer.

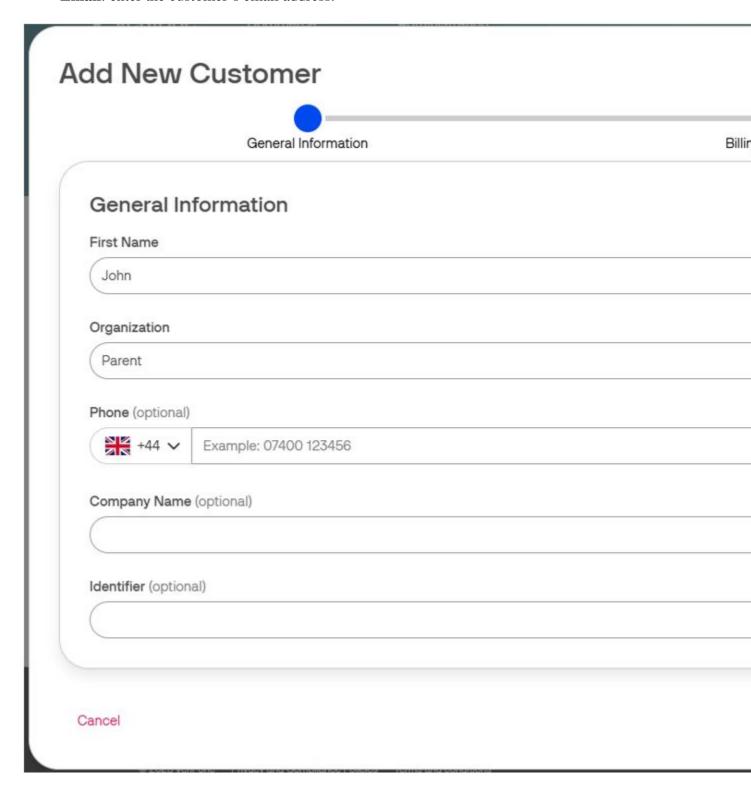
Customer Catalog

Type email address or phone number

Organizations V

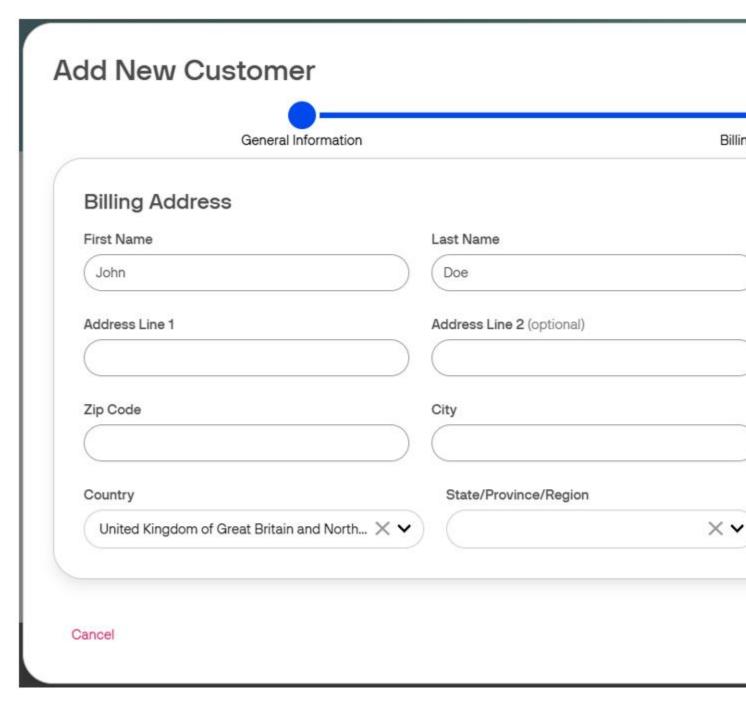
3. Fill in the mandatory fields in the *General Information* page, to proceed in creating the customer and click on **Continue**.

- First Name: enter the customer's first name.
- Last Name: enter the customer's last name.
- o **Organization**: select the organization where the customer will be created.
- o **Email**: enter the customer's email address.



4. Complete the *Billing/Shipping Address* page and select **Continue**.

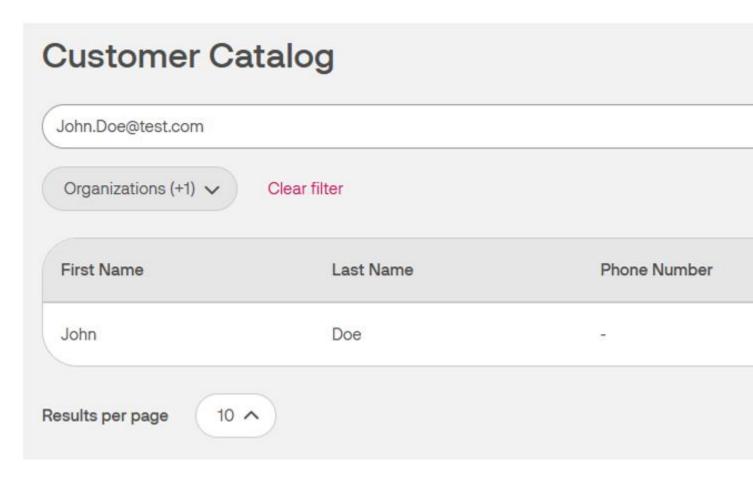
If the shipping address is the same as the billing address, you can leave the toggle button **Same as Billing Address** enabled.



5. Review the details entered and click on **Save & Close**.

Add New Customer Billin General Information General Information Billing Address First Name John First Name Last Name Last Name Doe Email Address John.Doe@test.com Address Line 1 Entity ID 76e84daa-c954-4c6a-8f7f-City 09758c078669 State/Province Zip Code Country Cancel

6. The newly created customer will be displayed in the customer catalog list, when searching for it and after applying the relevant filters.



Edit an existing customer

You can edit the details for an already added customer, by following the below steps.

The *Organization* and *Email* fields cannot be edited, and the customer needs to be created again under the new/updated organization or with the new/updated email address. For any organization the email address needs to be unique.

From the *Customer Catalog* list, select the customer for which the details need to be updated. Once the information is updated click on **Save & Close**. You can search for the customers using the email address or phone number.

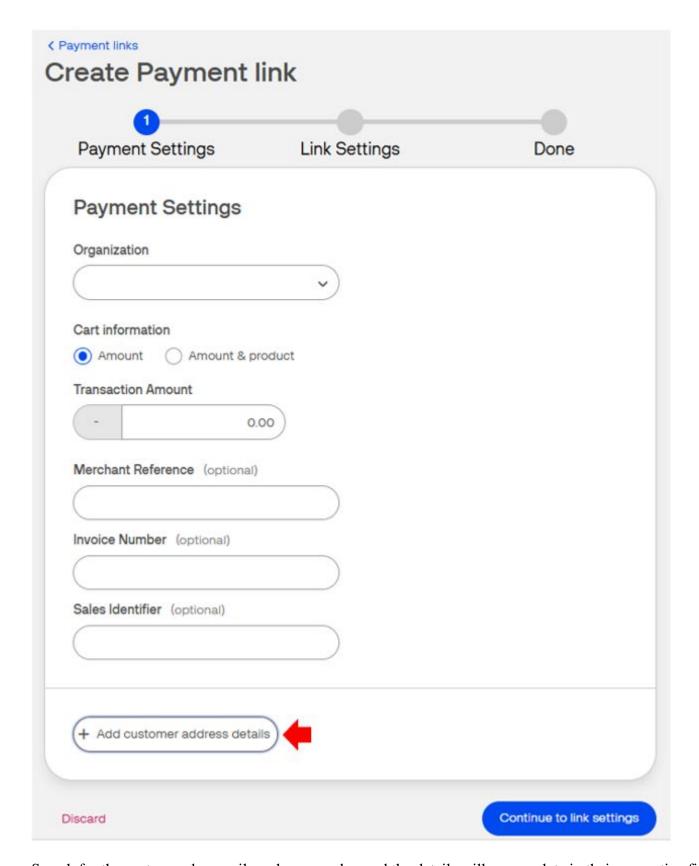
Customer Catalog edit Details

You can switch between the *Details* and *Billing/Shipping* tabs, to update the required information.

Customer Catalog edit Billing/Shipping

Add customer details in Pay by Link

In the *Create payment link* page, when <u>creating the payment link</u>, select the **Add customer address** details to expand the customer details fields.



Search for the customer, by email or phone number and the details will prepopulate in their respective fields.

t@test.com	×
Details	
First Name	Last Name
Test	Test
Email (optional)	Phone (optional)
test@test.com	+44 V Example: 07400 123
Needed to authenticate the custome processing	r for Will be shared with payment providers for processing
processing	
Identifier (optional)	
Identifier (optional)	
	Last Name test
Billing Details First Name	Last Name
Billing Details First Name	Last Name test
Billing Details First Name test Address Line 1 (optional)	Last Name test Address Line 2 (optional)
Billing Details First Name test Address Line 1 (optional)	Last Name test Address Line 2 (optional) 32
Billing Details First Name test Address Line 1 (optional) test Zip Code (optional)	Last Name test Address Line 2 (optional) 32 City (optional)