

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.

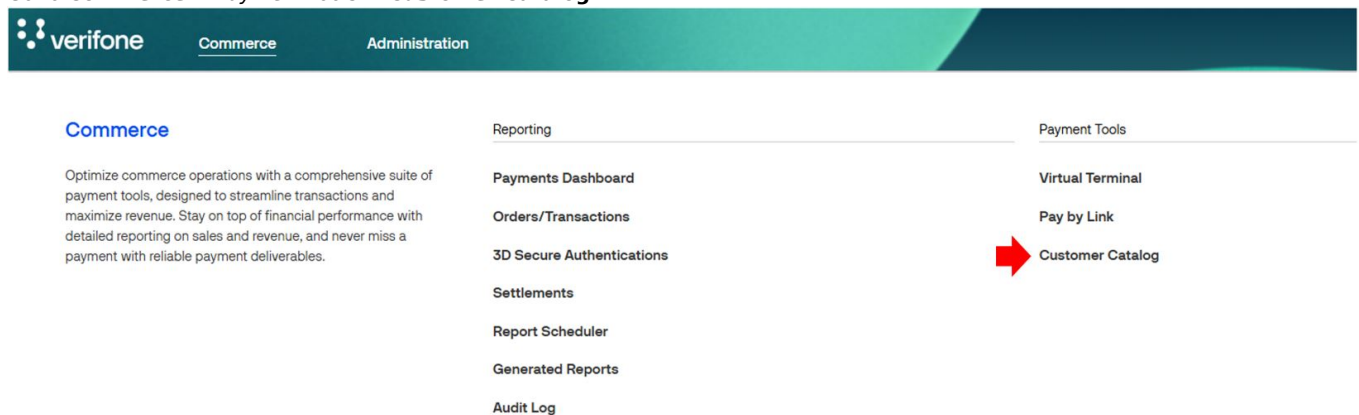
Availability

To check which roles can add / edit / remove a customer or see the customer catalog list check our [Users and 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**.

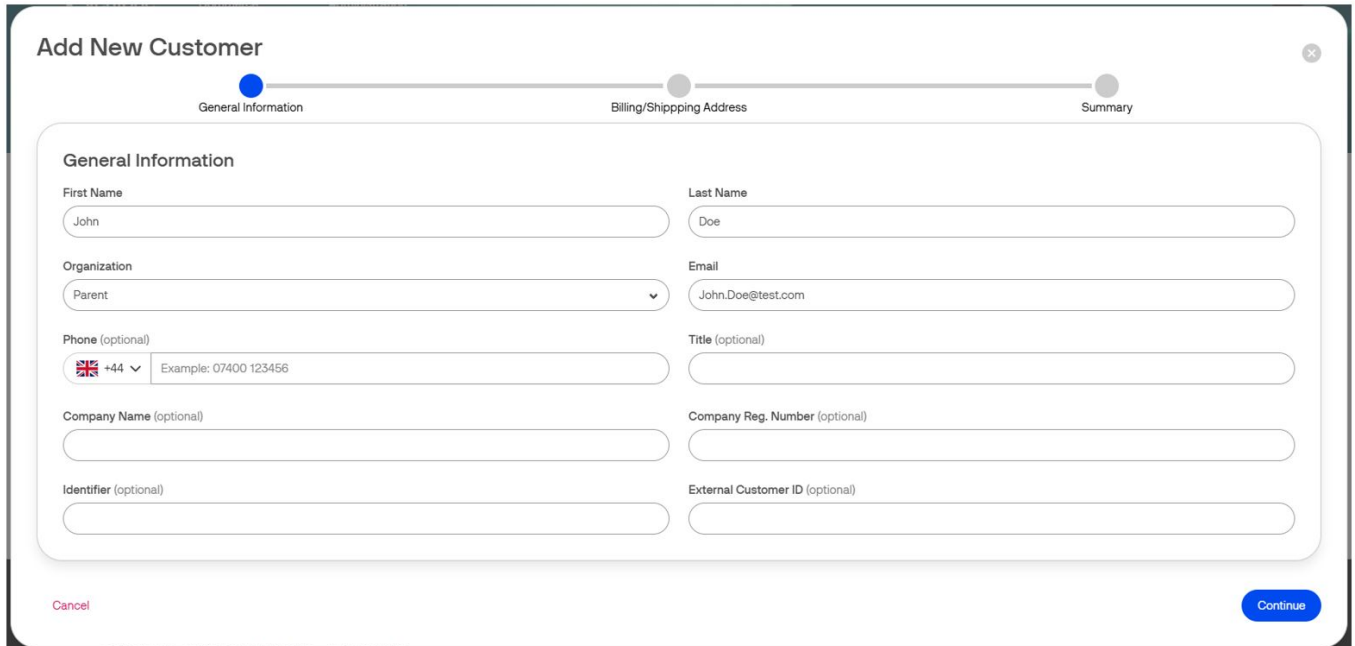


2. Click on **Add new customer**.



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.

- **Organization:** select the organization where the customer will be created.
- **Email:** enter the customer's email address.



Add New Customer

General Information Billing/Shipping Address Summary

General Information

First Name: John Last Name: Doe

Organization: Parent Email: John.Doe@test.com

Phone (optional): +44 Title (optional):

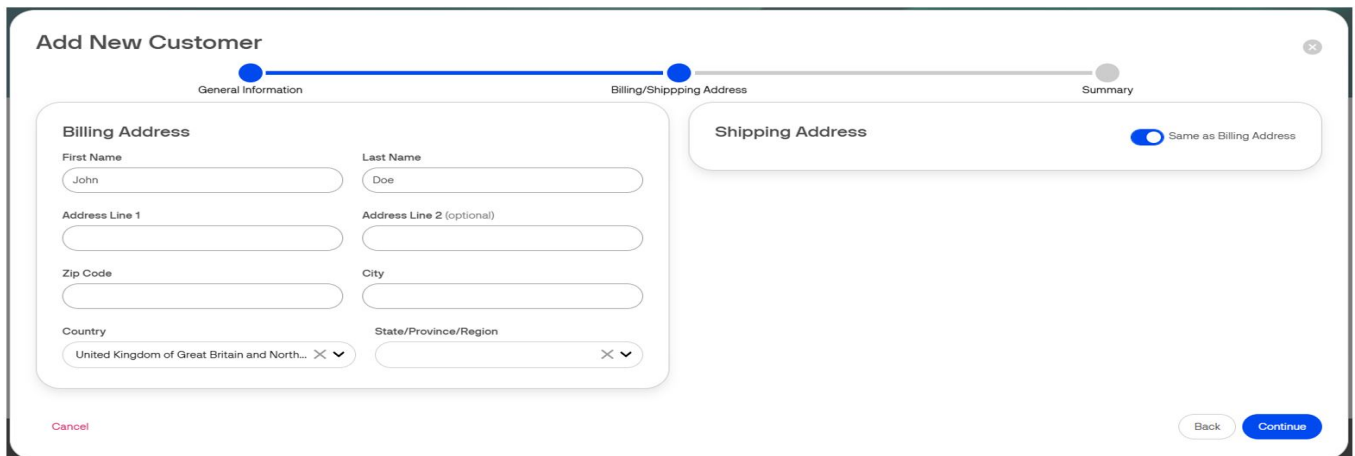
Company Name (optional): Company Reg. Number (optional):

Identifier (optional): External Customer ID (optional):

Cancel Continue

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.



Add New Customer

General Information Billing/Shipping Address Summary

Billing Address

First Name: John Last Name: Doe

Address Line 1: Address Line 2 (optional):

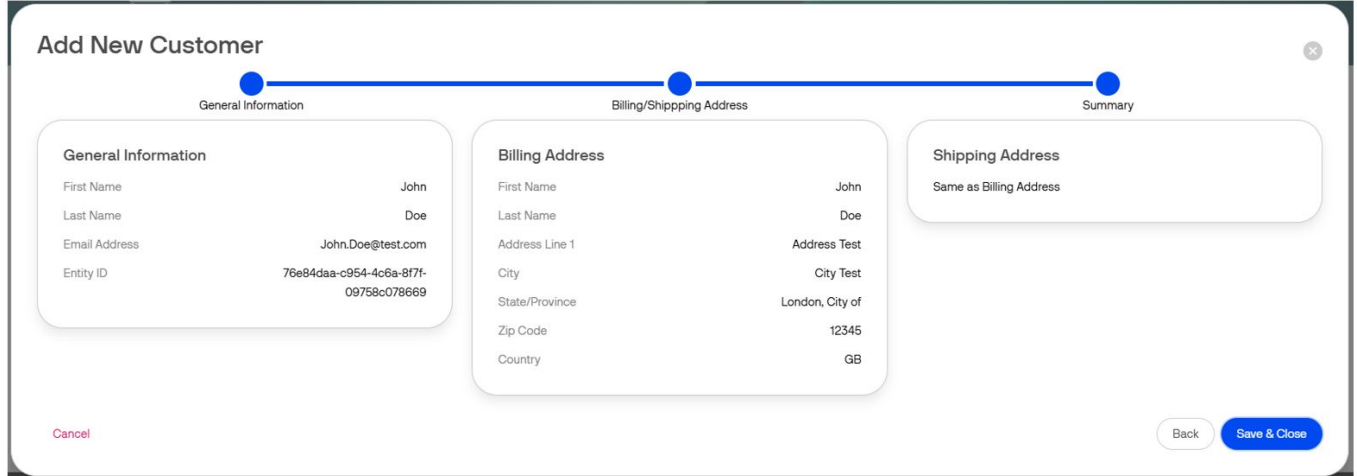
Zip Code: City:

Country: United Kingdom of Great Britain and North... State/Province/Region:

Shipping Address Same as Billing Address

Cancel Back Continue

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



The 'Add New Customer' form is a multi-step process. It has three steps: General Information, Billing/Shipping Address, and Summary. The first step, 'General Information', is currently active and shows the following details:

General Information	
First Name	John
Last Name	Doe
Email Address	John.Doe@test.com
Entity ID	76e94daa-c954-4c6a-8f7f-09758c078669

The second step, 'Billing Address', shows the following details:

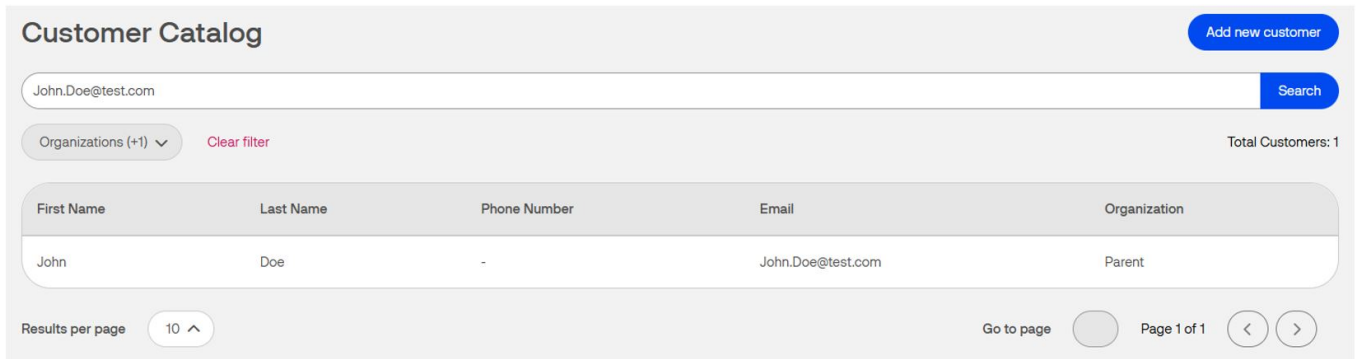
Billing Address	
First Name	John
Last Name	Doe
Address Line 1	Address Test
City	City Test
State/Province	London, City of
Zip Code	12345
Country	GB

The third step, 'Shipping Address', shows the following detail:

Shipping Address	
Same as Billing Address	

At the bottom of the form, there are buttons for 'Cancel', 'Back', and 'Save & Close'.

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



The 'Customer Catalog' table displays a list of customers. The search bar contains 'John.Doe@test.com' and the 'Search' button is clicked. The table shows one customer with the following details:

First Name	Last Name	Phone Number	Email	Organization
John	Doe	-	John.Doe@test.com	Parent

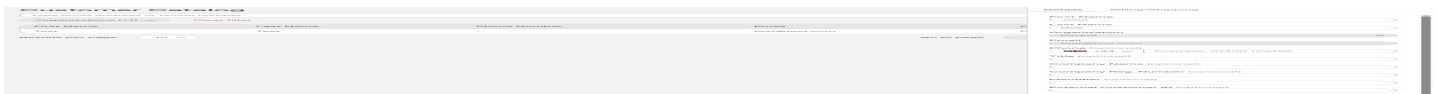
At the bottom of the table, there are controls for 'Results per page' (set to 10), 'Go to page' (set to 1), and 'Page 1 of 1'.

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.



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

Customer Catalog

Organizations (+1)
Clear filter

First Name	Last Name	Phone Number	Email
Test	Test	-	test@test.com

Results per page: 10
Go to page:

Details
Billing/Shipping

Billing Details

First Name: test

Last Name: test

Address Line 1: test

Address Line 2 (optional): 32

Zip Code: 234234

City: test

Country: United Kingdom of Great Britain and Northern Ir...

State/Province/Region:

Shipping Details

☒ The shipping address is same as the Billing Address

Cancel
Save & Close

Add customer details in Pay by Link

In the *Create payment link* page, when [creating the payment link](#), select the **Add customer address** details to expand the customer details fields.

Payment links
Create Payment link

Payment Settings
Link Settings
Done

Payment Settings

Organization:

Cart information:
☒ Amount
☐ Amount & product

Transaction Amount: 0.00

Merchant Reference (optional):

Invoice Number (optional):

Sales Identifier (optional):

Add customer address details

Discard
Continue to link settings

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

Customer details

Search customer

test@test.com X v

Details

First Name

Test

Last Name


Test

Email (optional)

test@test.com

Needed to authenticate the customer for processing

Phone (optional)

 +44 v

Example: 07400 123

Will be shared with payment providers for processing

Identifier (optional)

Billing Details

First Name

test

Last Name

test

Address Line 1 (optional)

test

Address Line 2 (optional)

32

Zip Code (optional)

234234

City (optional)

test

Country (optional)

United Kingdom of Great Britain and North... X v

State/Province/Region (optional)

☒ The shipping address is same as the Billing Address