

## 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.

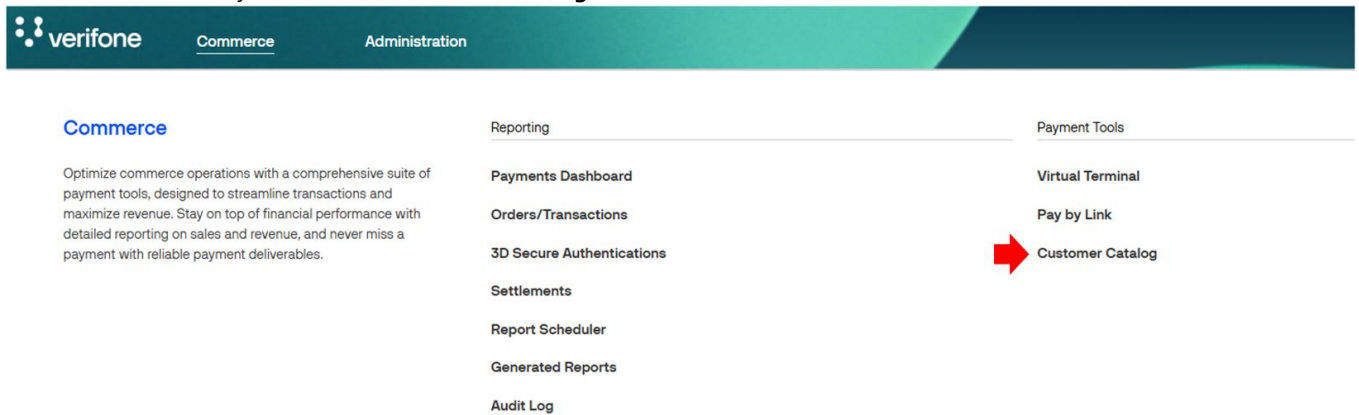
### Availability

To check which roles can add / edit / remove a customer or see the customer catalog list check our [Users and merchants roles](#) documentation.

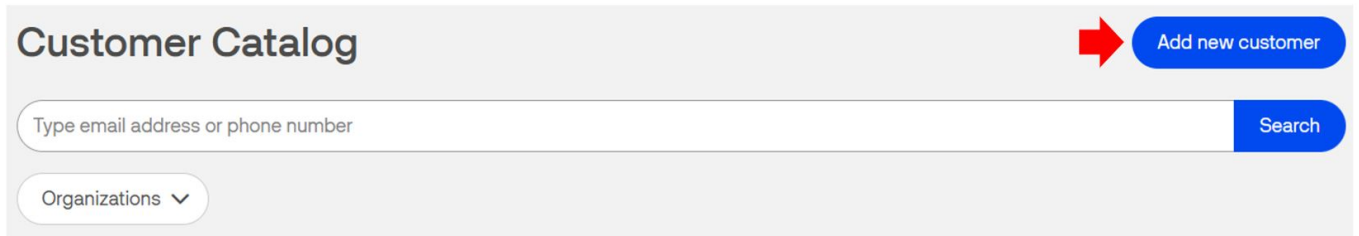
### Add new customer

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**.

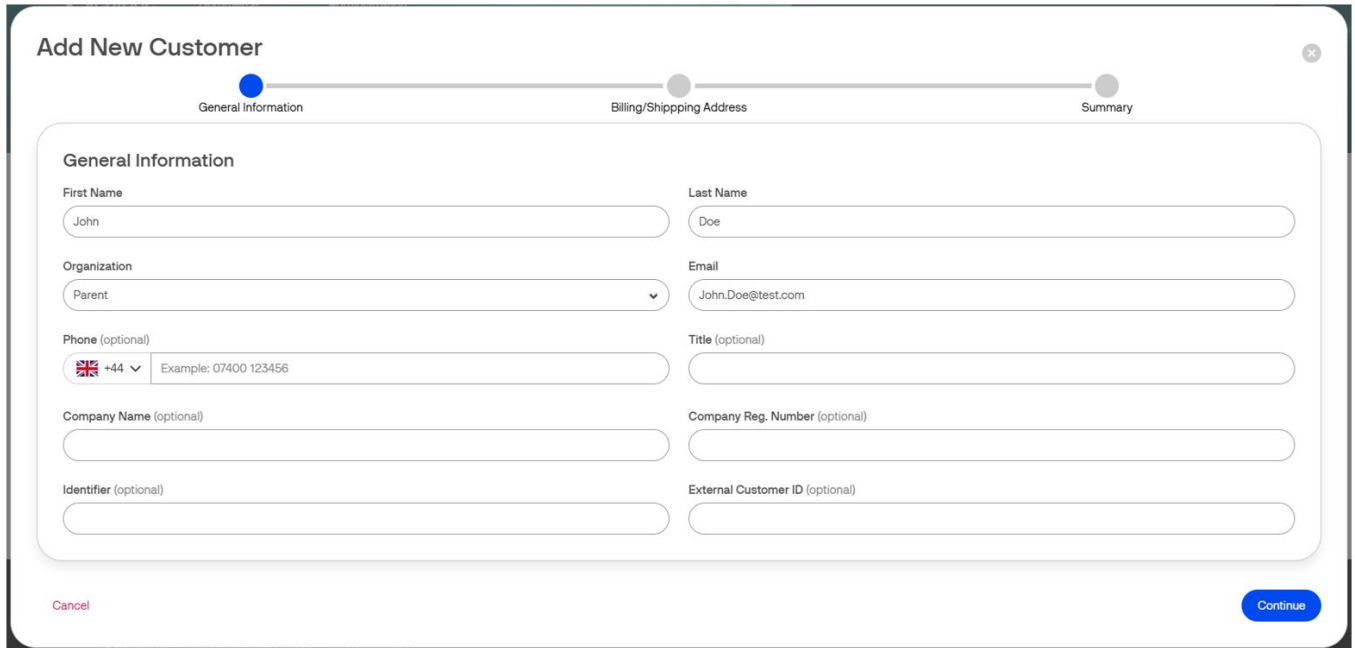


2. Click on **Add new customer**.



3. Fill in the mandatory fields in the *General Information* page, to proceed in creating the customer and click on **Continue**.
  - o **First Name**: enter the customer's first name.
  - o **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.



**Add New Customer**

Progress: General Information (active), Billing/Shipping Address, Summary

**General Information**

First Name: John

Last Name: Doe

Organization: Parent

Email: John.Doe@test.com

Phone (optional): +44 (Country code), Example: 07400 123456

Title (optional):

Company Name (optional):

Company Reg. Number (optional):

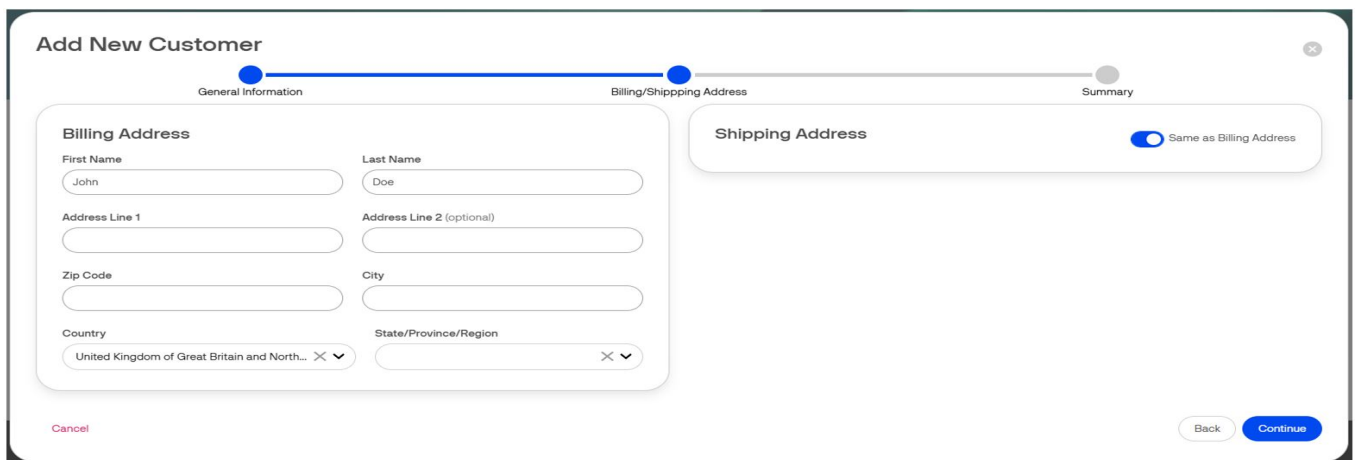
Identifier (optional):

External Customer ID (optional):

Buttons: 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**

Progress: General Information, Billing/Shipping Address (active), 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...

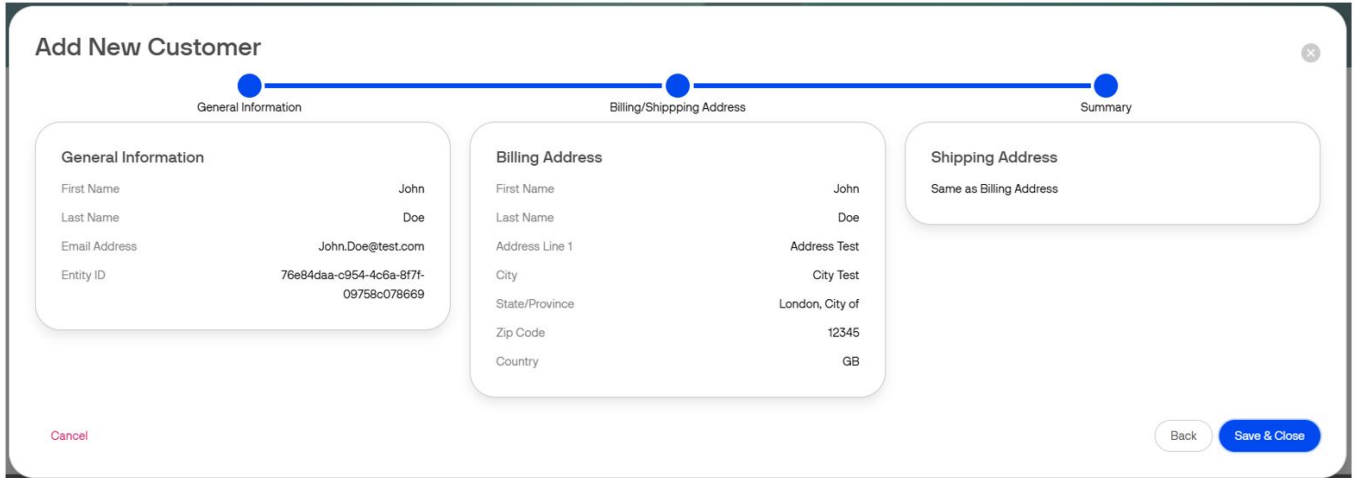
State/Province/Region:

**Shipping Address**

Same as Billing Address:

Buttons: Cancel, Back, Continue

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



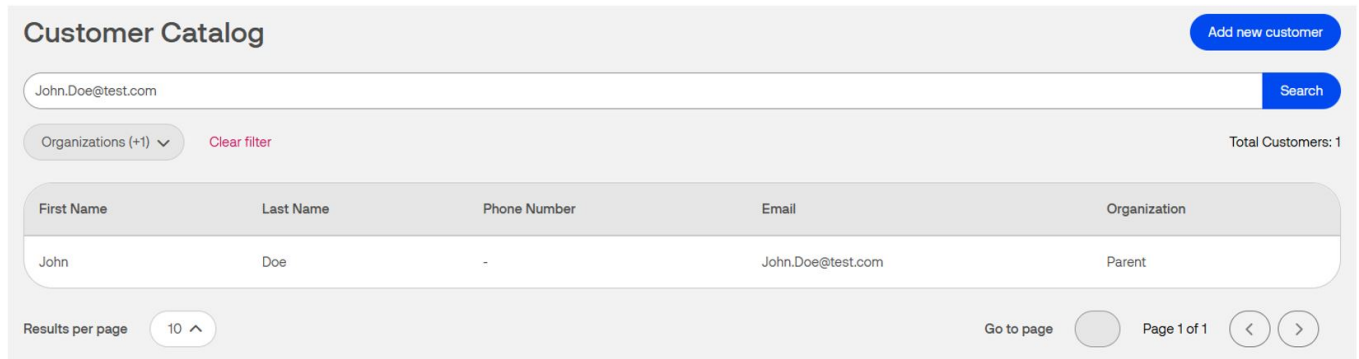
**Add New Customer**

Progress: General Information (selected) | Billing/Shipping Address | Summary

General Information		Billing Address		Shipping Address	
First Name	John	First Name	John	Same as Billing Address	
Last Name	Doe	Last Name	Doe		
Email Address	John.Doe@test.com	Address Line 1	Address Test		
Entity ID	76e94daa-c954-4c6a-8f7f-09758c078669	City	City Test		
		State/Province	London, City of		
		Zip Code	12345		
		Country	GB		

Buttons: Cancel, Back, Save & Close

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



**Customer Catalog** Add new customer

Search: John.Doe@test.com Search

Organizations (+1) Clear filter Total Customers: 1

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

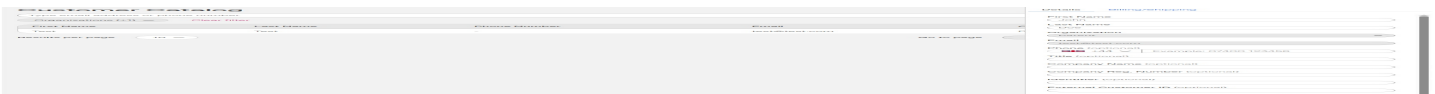
Results per page: 10 Go to page: Page 1 of 1

### Edit an existing customer

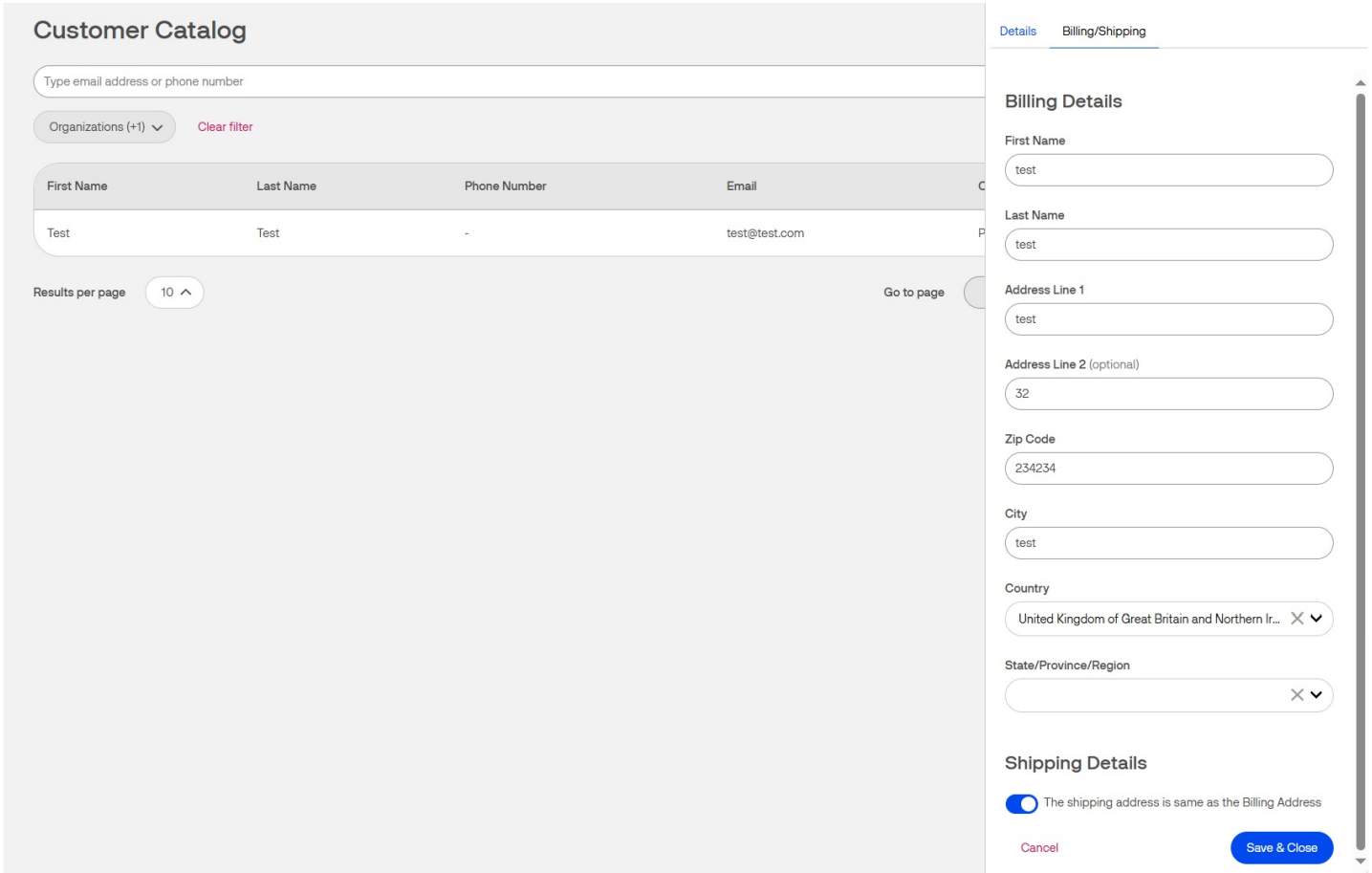
You can edit the details for an already added customer, by following the below steps.

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**

Type email address or phone number

Organizations (+1) Clear filter

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

Results per page: 10 Go to page

**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: ✕

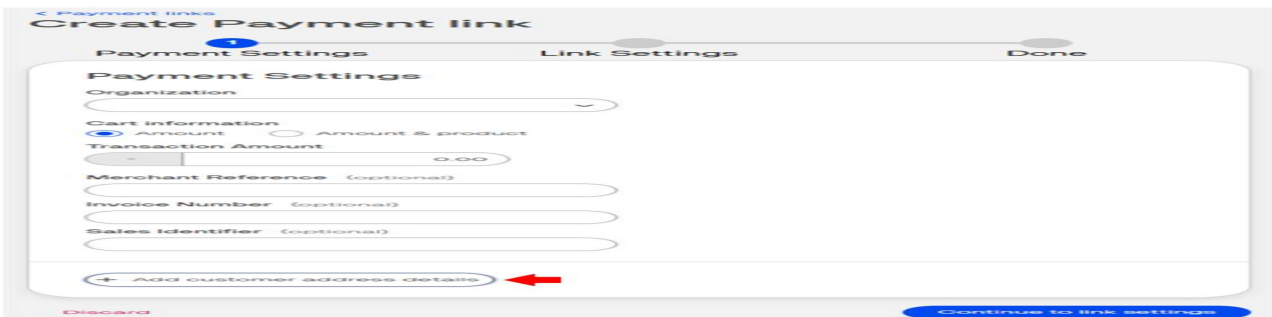
**Shipping Details**

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.



**Create Payment link**

Payment Settings | Link Settings | Done

Organization: ▼

Cart Information:  Amount  Amount & product

Transaction Amount: 0.00

Merchant Reference (optional):

Invoice Number (optional):

Sales Identifier (optional):

← Add customer address details → Continue to link settings

Discard

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

### Customer details

Search customer

 ✕ ▼

#### Details

<b>First Name</b> <input type="text" value="Test"/>	<b>Last Name</b> <input type="text" value="Test"/>
<b>Email (optional)</b> <input type="text" value="test@test.com"/> <small>Needed to authenticate the customer for processing</small>	<b>Phone (optional)</b> <input type="text" value="+44"/> <span>▼</span> <input type="text" value="Example: 07400 123"/> <small>Will be shared with payment providers for processing</small>
<b>Identifier (optional)</b> <input type="text"/>	

#### Billing Details

<b>First Name</b> <input type="text" value="test"/>	<b>Last Name</b> <input type="text" value="test"/>
<b>Address Line 1 (optional)</b> <input type="text" value="test"/>	<b>Address Line 2 (optional)</b> <input type="text" value="32"/>
<b>Zip Code (optional)</b> <input type="text" value="234234"/>	<b>City (optional)</b> <input type="text" value="test"/>
<b>Country (optional)</b> <input type="text" value="United Kingdom of Great Britain and North..."/> <span>✕</span> <span>▼</span>	<b>State/Province/Region (optional)</b> <input type="text"/>

The shipping address is same as the Billing Address