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

Billir

General Information

First Name

John

Organization

Parent

Phone (optional)

+44 ⌄   Example: 07400 123456

Company Name (optional)

Identifier (optional)

Cancel

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

Billin

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

✕ ⌄

Cancel

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

Add New Customer

General Information ———————— Billin

General Information

First Name	John
Last Name	Doe
Email Address	John.Doe@test.com
Entity ID	76e84daa-c954-4c6a-8f7f-09758c078669

Billing Address

First Name

Last Name

Address Line 1

City

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.

Customer Catalog

John.Doe@test.com

Organizations (+1) ∨   Clear filter

First Name	Last Name	Phone Number
John	Doe	-

Results per page   10 ∧

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 creating the payment link, 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.

Customer details

Search customer

test@test.com ✕ ⌄

Details

First Name

Test

Last Name

Test

Email (optional)

test@test.com

Needed to authenticate the customer for processing

Phone (optional)

🇬🇧 +44 ⌄ | 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... ✕ ⌄

State/Province/Region
(optional)

⌄

🔵 The shipping address is same as the Billing Address