



***HOW TO
Set Up and
Administer Customers***

Revision 1.3



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HOW TO

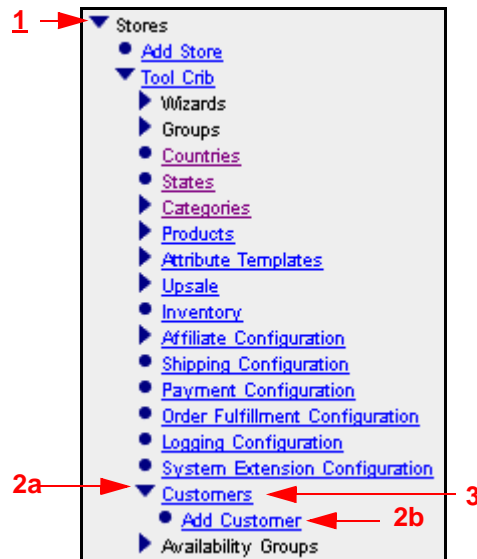
Set Up and Administer Customers

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 add and edit customer information.






1. Click the triangle next to the store name to open the menu.
2. To add a customer:
 - a. Click the triangle next to Customers.
 - b. Select the Add Customer link. See ["Add New Customers"](#) on page 6.
3. To edit the Customer List or a Customer form, select the Customer link.

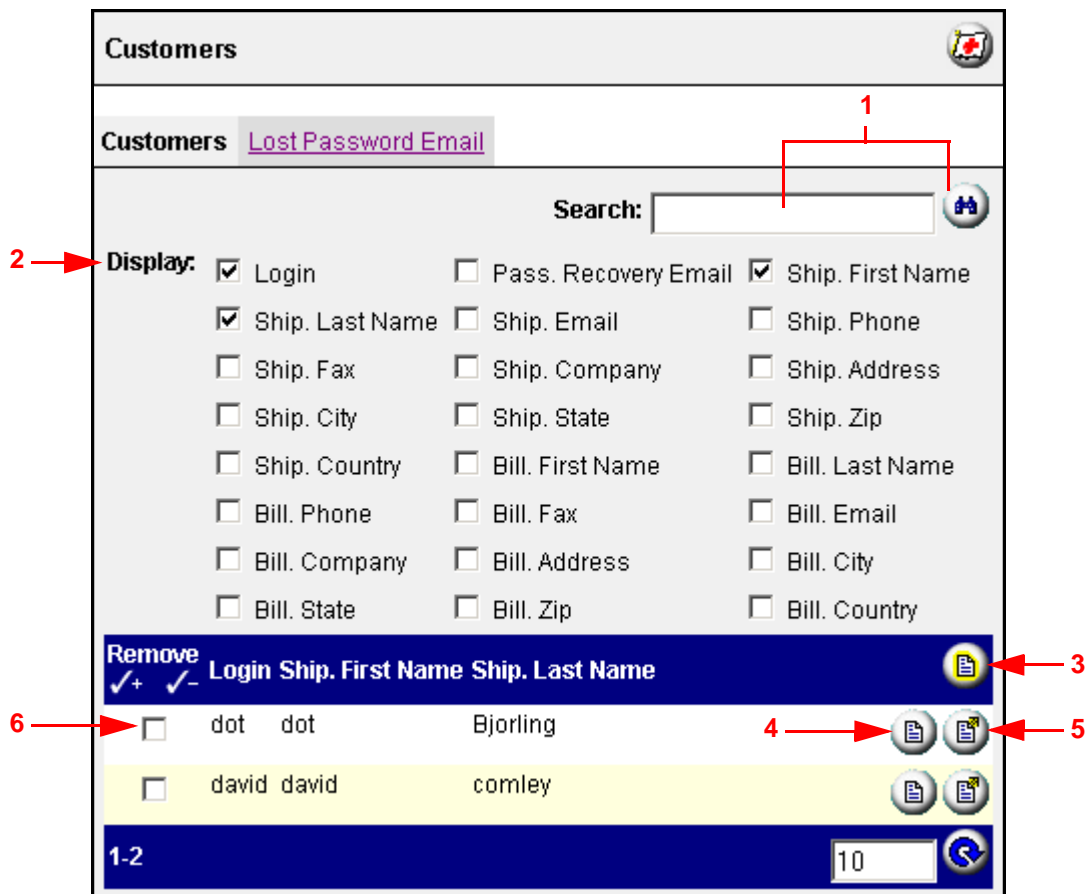


Customers List

The Customers list form is displayed. The forms has the tabs: Customers and Lost Password Email.

Customers Tab

1. Search for a customer.
 - a. Enter the search criteria into the text box, then click the Search  button.
 - b. Those customers that meet the search criteria are displayed.
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 Update. The checked items are then displayed as text in the customer list. In the above screen, Login, Pass., Recovery Email, Recovery Email.
 - a. Enter the search criteria into the text box, then click the Search  button.
 - b. Those customers that meet the search criteria are displayed.
3. Click the New Customer  button to add a new customer. Refer to “Add New Customers” on page 6 for additional information about this procedure.
4. Click the Edit Here  button to change data in that row.
5. Click the Edit  button to edit all information for an existing customer. See “Edit Customer” on page 3.
6. To remove a customer, check the box in the Remove column. Click + to check all displayed customers, and – to uncheck all displayed customers.



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.

1. Enter or change any of the following information.
 - 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.
2. Click Update.

Edit Customer

The following form is displayed. The form has the tabs: Identification and Shipping/Billing Information.

Identification Tab

Edit Customer: george 

Identification
Shipping/Billing Information

Login:	<input style="width: 80%;" type="text" value="george"/>
Email Lost Passwords To:	<input style="width: 80%;" type="text" value="george@miva.com"/>
Password:	<input style="width: 80%;" type="password"/>
Confirm Password:	<input style="width: 80%;" type="password"/>

- a. Change any of the following Identification information:
 - Login The name the customer will use as a login name.
 - Email Lost Passwords To The email address you will use to send the password if the customer notifies you that it is lost.
 - Password The password.
 - Confirm Password Confirm the password.
- b. Select the Shipping/Billing Information tab to change other customer data.

Shipping/Billing Tab

1. Change any of the Ship To information.
2. If the Billing address is different, change the "Bill To:" information.
3. Click Update.

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 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>"/>

Mailing Lists (new in 4.13)

The mailing lists to which this customer has subscribed are shown on this tab. You can manually unassign a customer from lists here. And, although you can also assign a customer to lists, you might want to let them sign up or subscribe for themselves. (You should check the ramifications of sending unsolicited email in your area.)

Edit Customer: jamesb

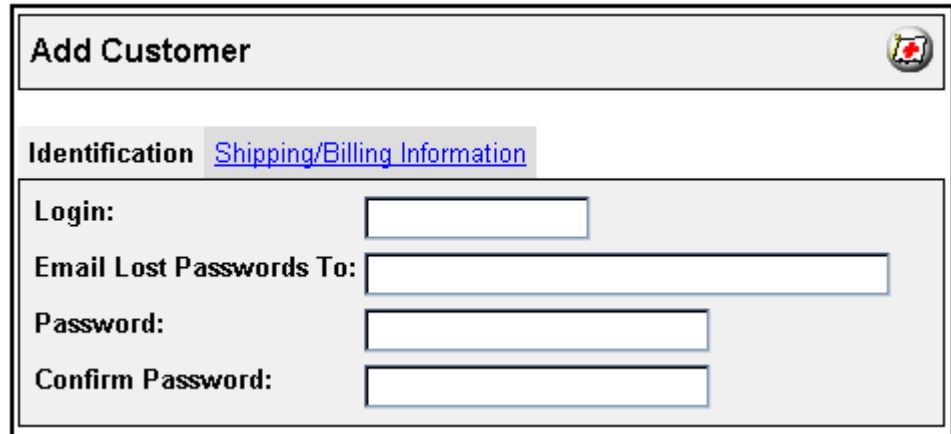
[Identification](#) [Shipping/Billing Information](#) **Mailing Lists**

Assigned	Available Code	Prompt
✓+ ✓-		
<input checked="" type="checkbox"/>	✓	News1 <i>Subscribe to Monthly Newsletter (includes upcoming sales specials, new product information, articles on related interests and hobbies, and more!)</i>
<input checked="" type="checkbox"/>	✓	Sale1 <i>Get Featured Products & Sales Info Sign up to be informed about our special sales</i>
<input type="checkbox"/>	✓	testcode <i>You can use HTML code in the prompt. But, the HTML will not be validated. Invalid HTML code may cause your store to display improperly.</i>

Add New Customers

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

Identification Information




The screenshot shows a web form titled "Add Customer" with a small icon in the top right corner. Below the title bar, there are two tabs: "Identification" (which is selected and highlighted) and "Shipping/Billing Information". The "Identification" tab contains four input fields: "Login:" with a text box, "Email Lost Passwords To:" with a text box, "Password:" with a text box, and "Confirm Password:" with a text box.

1. 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.
2. Select the Shipping/Billing Information tab.

Shipping/Billing Information

3. Add the Ship To information.
4. If the Billing address is different, enter the Bill To 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 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>"/>

Mailing Lists (new in 4.13)

The mailing lists assignments reflect the way the prompts are checked in the Mailing List Settings. If you checked **Subscribe Customer by Default**, then all the mailing lists here will be checked.

5. Be sure to uncheck each list to which you do not want to automatically subscribe this new customer.
6. Click Add.