



***HOW TO
Set Up & Administer
Customers***

Revision 1.1



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PN - MM1050-02 (ver. 3.00)

HOW TO

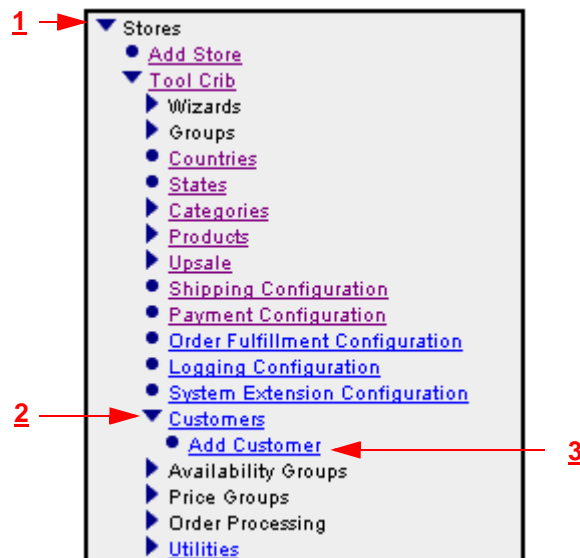
Set Up & Administer Customers

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 Groups and Price Groups refer to: *HOW TO Set Up Availability Groups* and *HOW TO Set Price Groups*.

Use the following procedure to set up and edit customer information.

1. Click the triangle next to the store name to open the menu.
2. Click the Customer link to open the Edit Customer form.
3. To add a customer, click the triangle next to Customers. Then click the Add Customer link, and see [“Add New Customers” on page 5.](#)



Edit Customer Information

The Edit Customer form is displayed. There are two tabs on the form; Customers and Lost Password Email.

Customers Tab

The screenshot shows the 'Customers' tab interface. At the top, there is a 'Customers' header with a search icon. Below it, there are two tabs: 'Customers' and 'Lost Password Email'. A search box is located to the right of the tabs, with a search icon button next to it. Below the search box is a 'Display:' section with a grid of checkboxes for various customer fields. A list of customers is shown below, with columns for a checkbox, a name, and an email address. To the right of each customer row are two buttons: 'Edit Here' and 'Edit'. At the bottom of the list, there is a page number '14' and a pagination control showing '10' and a refresh icon.

Customers [Lost Password Email](#)

Search:

Display:

<input checked="" type="checkbox"/> Login	<input checked="" type="checkbox"/> Pass. Recovery Email	<input type="checkbox"/> Ship. First Name
<input type="checkbox"/> Ship. Last Name	<input type="checkbox"/> Ship. Email	<input type="checkbox"/> Ship. Phone
<input type="checkbox"/> Ship. Fax	<input type="checkbox"/> Ship. Company	<input type="checkbox"/> Ship. Address
<input type="checkbox"/> Ship. City	<input type="checkbox"/> Ship. State	<input type="checkbox"/> Ship. Zip
<input type="checkbox"/> Ship. Country	<input type="checkbox"/> Bill. First Name	<input type="checkbox"/> Bill. Last Name
<input type="checkbox"/> Bill. Phone	<input type="checkbox"/> Bill. Fax	<input type="checkbox"/> Bill. Email
<input type="checkbox"/> Bill. Company	<input type="checkbox"/> Bill. Address	<input type="checkbox"/> Bill. City
<input type="checkbox"/> Bill. State	<input type="checkbox"/> Bill. Zip	<input type="checkbox"/> Bill. Country

Remove Login Pass. Recovery Email

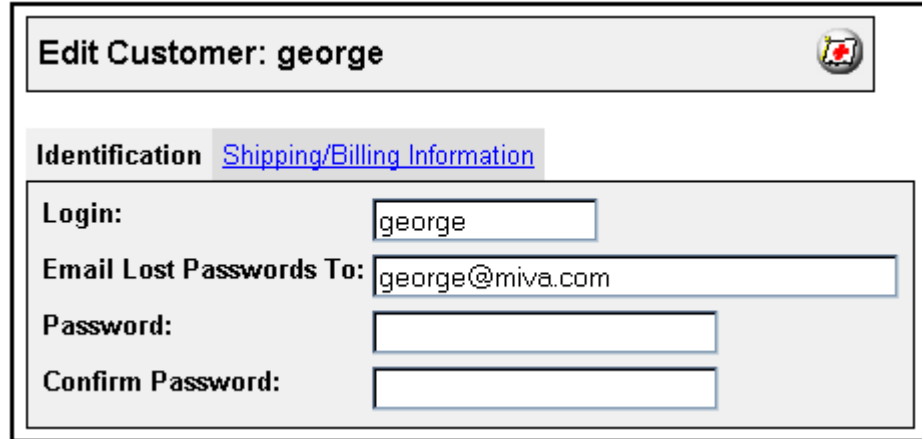
<input type="checkbox"/>	george george@miva.com		
<input type="checkbox"/>	g george@miva.com		
<input type="checkbox"/>	bill bill@miva.com		
<input type="checkbox"/>	kent kent@miva.com		

14

1. Search for a customer.
 - a. Enter the search criteria into the text box or 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.
3. Add a new customer by clicking the New Customer button. Refer to "Add New Customers," on page 5 for additional information about this procedure.
4. Click the Edit Here button to edit the information that is displayed on this row for an existing customer information.
5. Click the Edit button to edit all information for an existing customer.

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

Identification Information



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

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. Check the Shipping/Billing Information link to change other customer data.

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>"/>

Change any of the following ship to information.

- First Name
- Last Name
- Email Address
- Phone Number
- Fax Number
- Company
- Address
- City
- State/Province
- Other State/Province
- Country

If the Billing address is different, change the "Bill To:" information.

Lost Password Email Tab

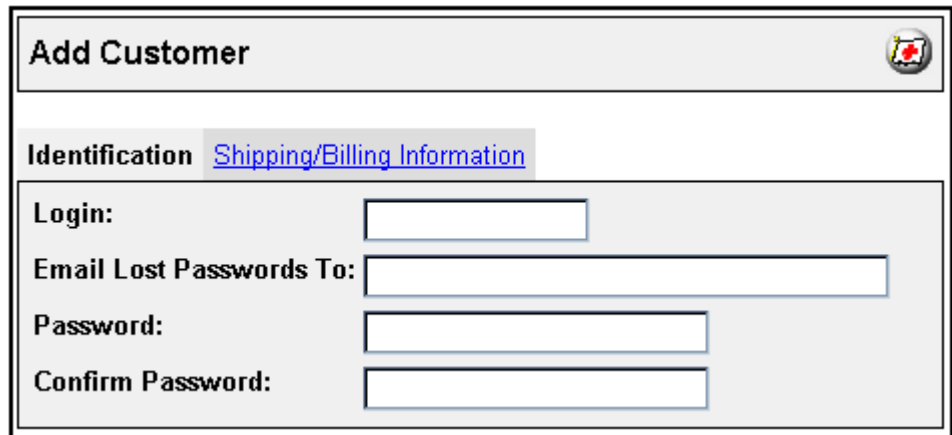
This is the form to set up your message to any customer that requests that his or her forgotten password be sent via email.

- 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.
- Click Update.

Add New Customers

The Add Customer form has two 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" (which is a blue link). The "Identification" tab contains four labeled input fields: "Login:" with a short text box, "Email Lost Passwords To:" with a long text box, "Password:" with a medium text box, and "Confirm Password:" with a medium text box.

- 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.
- Click the Shipping/Billing Information link.

Shipping/Billing 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 style="border-bottom: 1px solid black;" type="text" value="California"/>	State/Province: <input style="border-bottom: 1px solid black;" 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 style="border-bottom: 1px solid black;" type="text" value="United States"/>	Country: <input style="border-bottom: 1px solid black;" type="text" value="<Select One>"/>

3. Enter the following ship to information.
 - First Name
 - Last Name
 - Email Address
 - Phone Number
 - Fax Number
 - Company
 - Address
 - City
 - State/Province
 - Other State/Province
 - Country
4. If the Billing address is different, enter the bill to information.
5. Click Add.