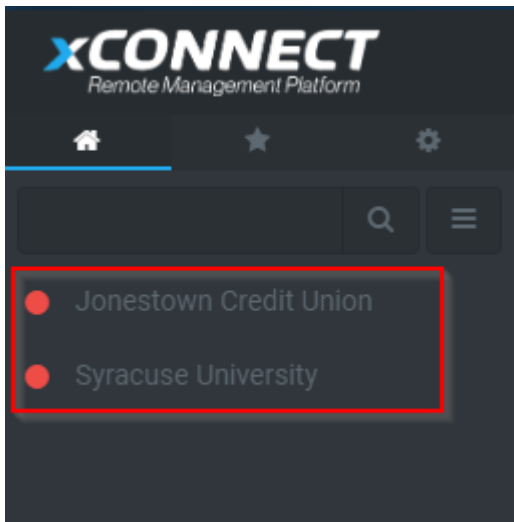


Manage Customers

Customers are a way to differentiate your various implementations of xConnect gateways in a meaningful way. The platform (MSP) model, which means that a single xConnect instance can have one or more customers that are being maintained.

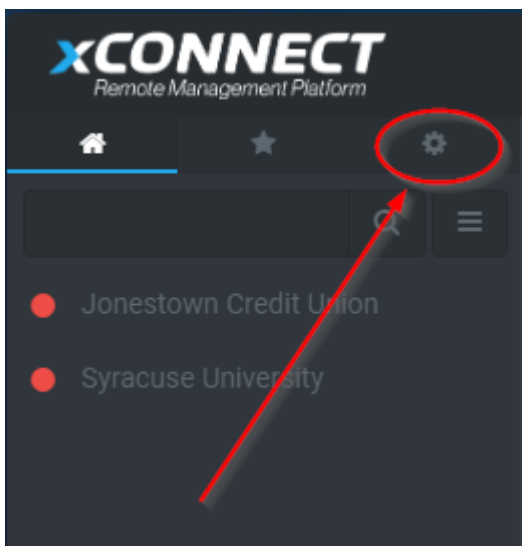
Any customers added will appear in the left-side menu:



Note: Only power users will be able to access the functionality listed below. If you are an end user, you will not be able to see

Adding or Updating a Customer

1. Log in as a power user
2. Click on the settings tab on the left-side menu



- 3. By default, the manage customers page will appear. If not, you can access it by clicking on "Manage Customers"
- 4. If you are adding a new customer, click on the "New Customer" button. If you are updating an existing customer, click on t
- 5. The customer entry modal will appear where you can either modify or add a new customer to the platform.

Add Customer

Customer Name *

Address

Street Address

Suite / Apt

City

State / Providence

Postal Code

Country

Contact

First Name

Last Name

Email

Primary Phone

Secondary Phone

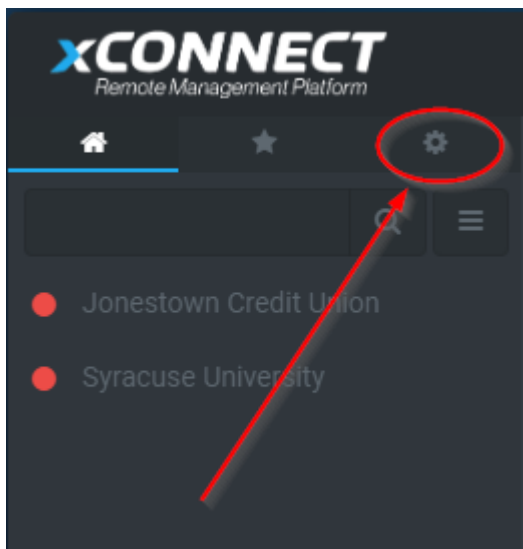
URLs

Note: You do not need to change any of the URLs for the images. These features are currently deprecated and will be removed.

Disabling and Reactivating a Customer

Disabling a customer will remove them from appearing in the side menu, and will remove the associated gateways from the customer by performing the following steps:

1. Log in as a power user
2. Click on the settings tab on the left-side menu



3. Once on the Manage Customers page, you can select one or more customers via the checkbox on the left. When 1 or more customers are selected, either the "Activate" or "Disable" button.

