Admin User Guide – Customers (User)

[] Getting Started

Accessing the Customers Console by an Admin User [#CusPage]

Overview

The **Customers (User)** microservice ("Customers") allows Consumers to register and manage their accounts, an admin to create and manage customer accounts, and Customer Service Representatives (CSRs) to manage customer accounts. As with all microservices in the Skava Commerce solution, Customers are associated with a store managed through the Store microservice.

For a detailed overview of the **Customers (User)** microservice, see the Customers (User) Microservice Overview [https://developer.skava.com/microservices/customers/] .

Service Glossary

- **Admin** – creates and manages customers' accounts.
- **Business** – the parent of a **store** or set of **stores**. The basic use of a **business** is to manage common sets of users, catalogs, and other services for the **stores** associated with the business.
- **Customer** – consumer or buyer on the Business' storefront or retail website.
- **CSR User** – manages customer accounts. CSR stands for Customer Service Representative.
- **GDPR** – stands for General Data Protection Regulation, which is a regulation in EU law on Data Protection and Privacy for all individuals within the EU and the European Economic Area (EEA).
- **Omni-channel** – a multichannel approach to sales that seeks to provide consumers with a seamless shopping experience, whether shopping online (on a desktop or on a mobile or tablet device), by telephone, or in person at a physical store (https://searchcio.techtarget.com/definition/omnichannel [https://searchcio.techtarget.com/definition/omnichannel]).
- **SSO** – means single sign-on, which is an authentication method that allow customers to login to your business' **storefront** by using their login credentials for a third-party, like Facebook.
- **Store** – represents a specific physical location or online store of a **business**.
- **Store Manager** – associates one **price list** for each currency supported by a **store**.

- [] **Storefront** – consumer-facing website that presents products, content, and promotions across multiple channels (i.e. desktop, tablet, and mobile).

[] Accessing the Customer Console

Getting Started [#GettingStart] | All Customers Page [#AllCustomersPage]

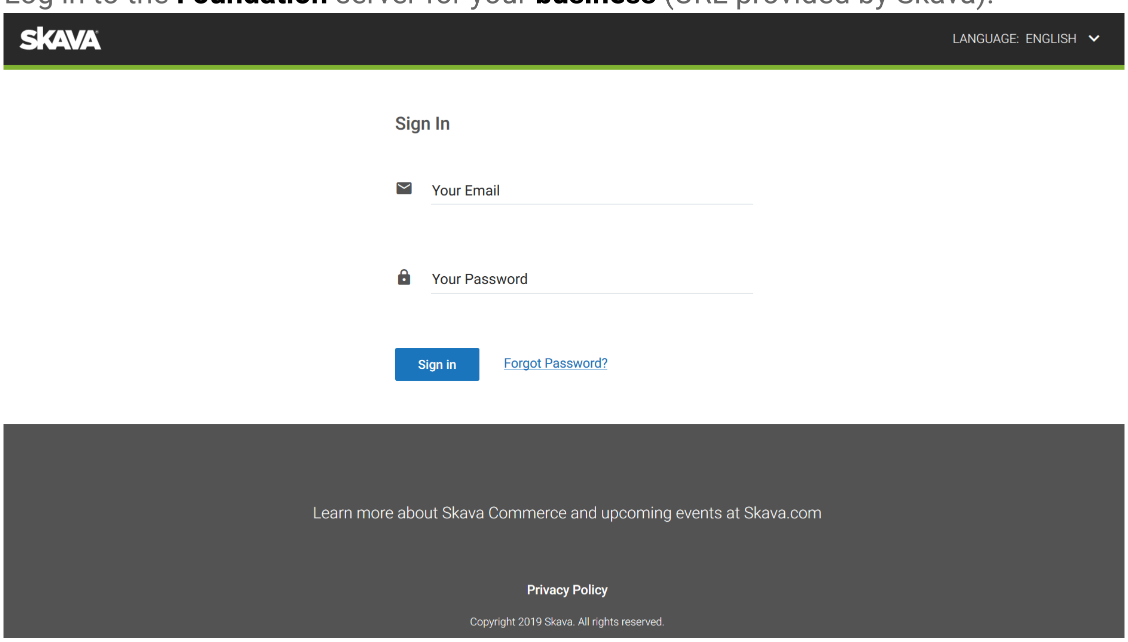
The Customer console can be accessed by an Admin user and/or CSR User.

- To access the Customer console by an Admin user, see Accessing the Customers Page by an Admin User [#CusPgeAdmin] .
- To access the Customer console by a CSR user, see Accessing the Customer Service Page by a CSR User [#CusSerPage] .

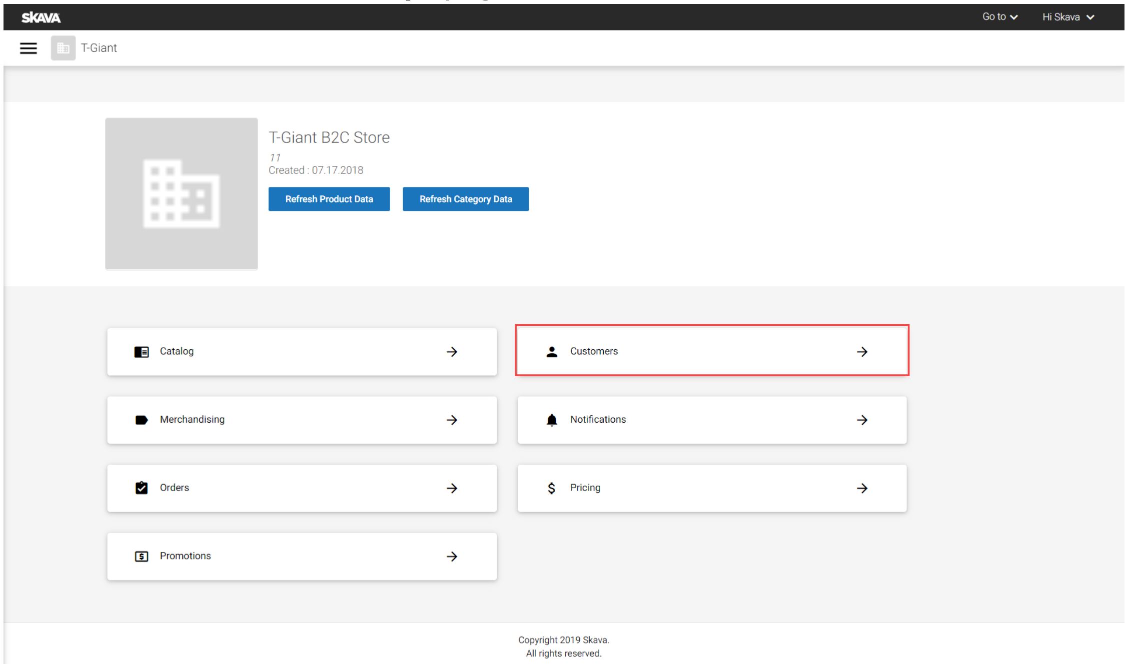
[] Accessing the Customers Console by an Admin User

To access the Customers console by an Admin,

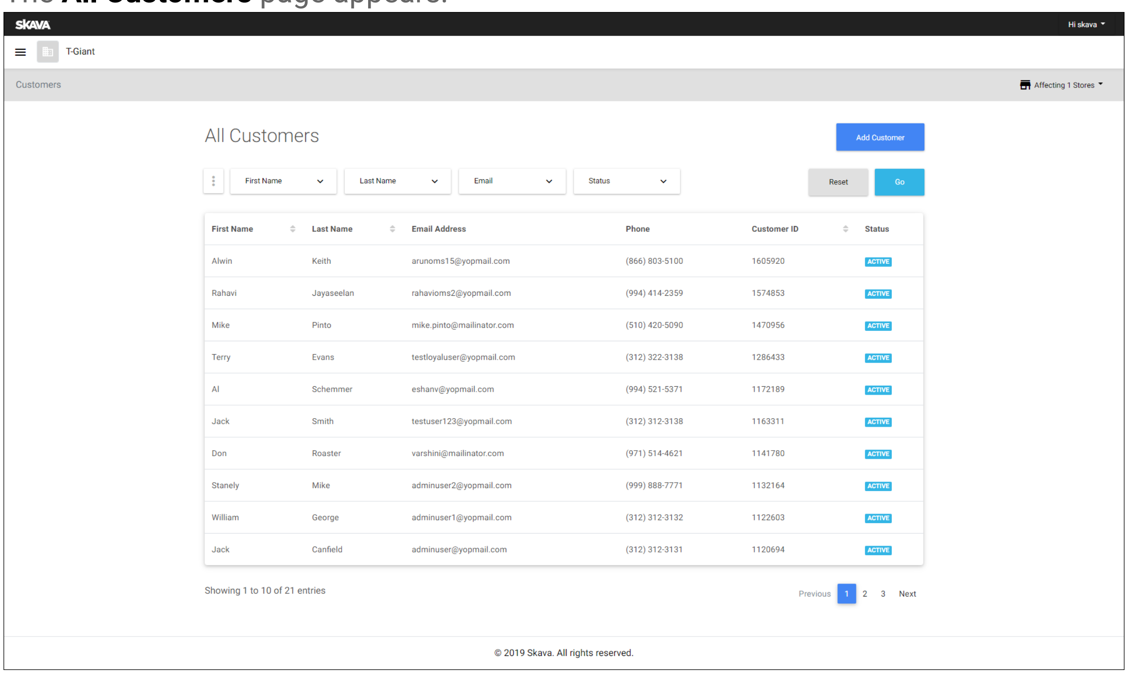
1. Log in to the **Foundation** server for your **business** (URL provided by Skava).



2. Click **Customers** in the **StoreOps** page.



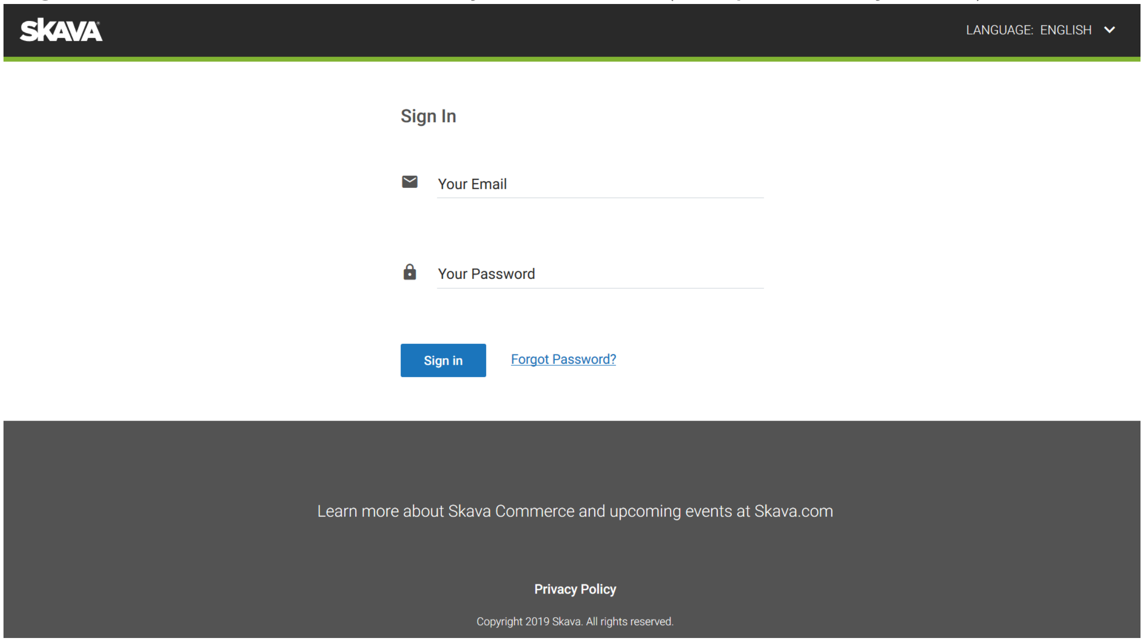
The **All Customers** page appears:



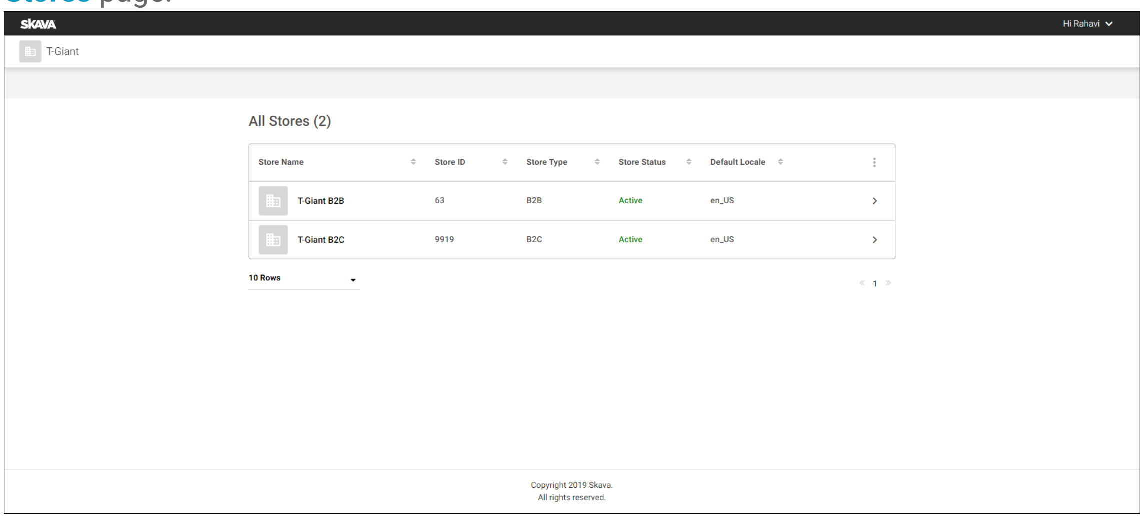
[] Accessing the Customer Service Page by a CSR User

To access the Customers Service page by a CSR user,

- Log in to the **Foundation** server for your **business** (URL provided by Skava).

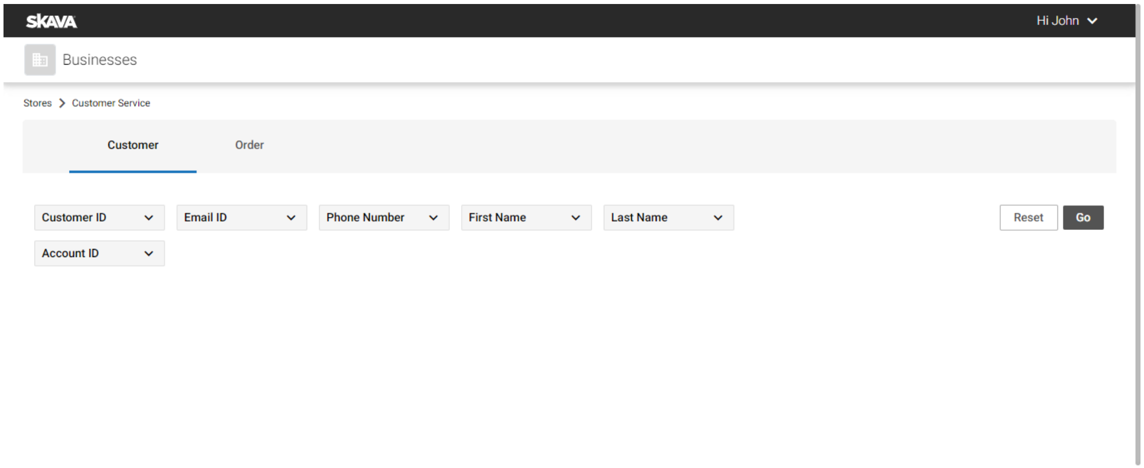


- If there are multiple stores available for a business, select the required store in the **All Stores** page.



Once a store is selected, the landing page of Customer Service Representative appears.

- If there is only one store per business, the landing page of Customer Service Representative appears.



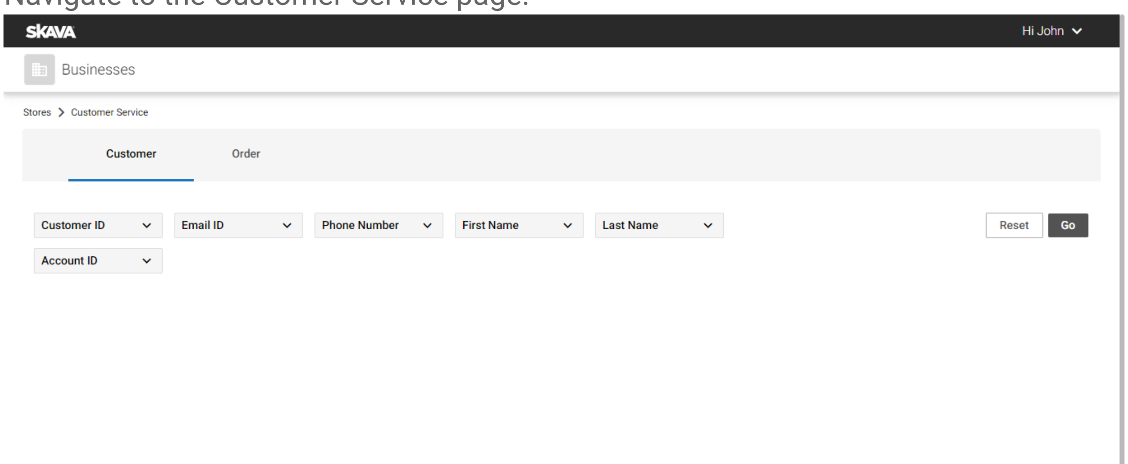
In the Customer Service page, you can search for customer(s) or order(s).

- To search for customer(s) account, refer to the Viewing Customer Accounts [#ViewCusAcc] .
- To search for order(s), refer to the Order Admin Guide [https://developer.skava.com/microservices/order/order-admin-user-guide/] .

[] Viewing Customer Account(s)

A CSR can view the details of a customer account in the Customer Service page.

1. Navigate to the Customer Service page.



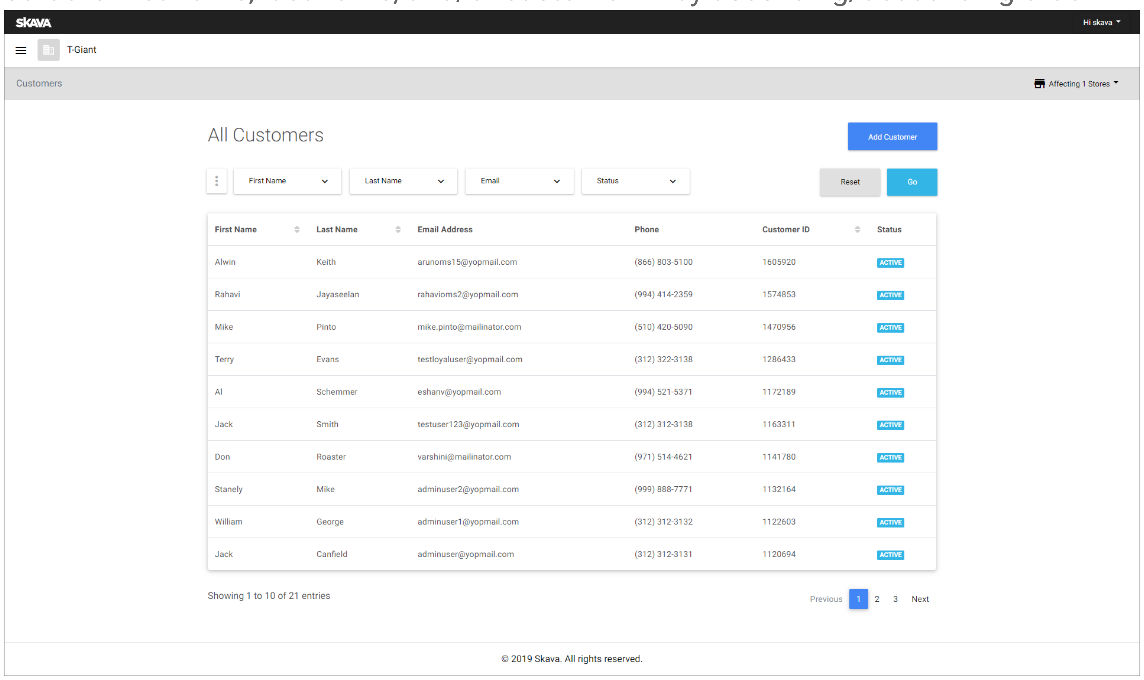
2. Click the drop-down on the **Customer ID**, **Email ID**, **Phone Number**, **First Name**, **Last Name**, or **Account ID** and then provide search criteria in the entry field.
   Note: You can filter using “Account ID” in B2B.
3. Click the **Go** button.
   Note:
   - If you enter the customer ID, the customer account will be displayed directly.
   - When there is more than one result, the search results will be displayed on the same page. You can choose a particular customer account and navigate to the customer detail page [#CusDetPage] of the Customer Admin console.

[] All Customers Page

[Accessing the Customer Console [#CusSerPage]](#CusSerPage) | [Configuring Search Parameters [#SearchCustomer]](#SearchCustomer)

In the All Customers page, you can:

- search for customers' account(s) [#SearchCustomer]
- invite a customer [#CreateCustomer]
- edit account details of a customer [#EditCustomer]
- freeze a customer account [#FreezeAccount]
- manage address(es) [#Addresses] and/or payment method(s) [#Payment] of customers
- view orders [#Orders] , cart [#Cart] , and/or loyalty details [#Loyalty] of customers
- sort the first name, last name, and/or customer ID by ascending/descending order.



Notes:

- Pagination option appears in all screens that contain the customer account data.
- To navigate to the next page, click **Next**.
- By default, 10 customer's accounts per screen will appear. For displaying a predefined number of orders per screen, see Selecting Predefined Rows [#RowSelect] .

[] Configuring Search Parameters

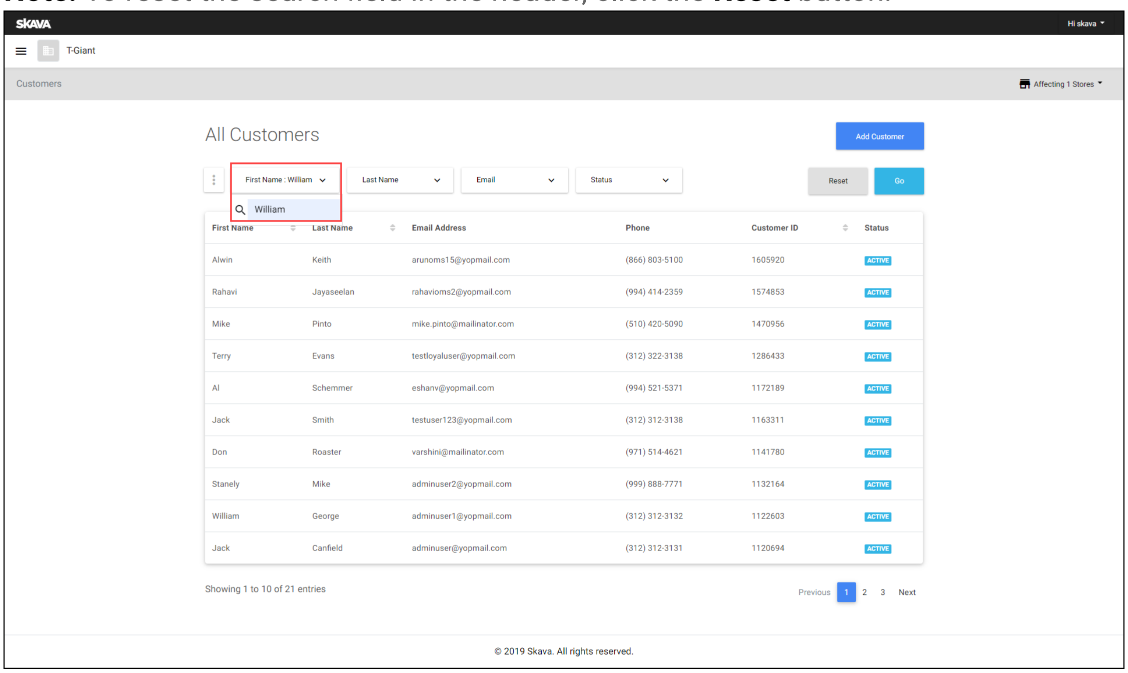
All Customers Page [#CustomersPage] | Creating a Customer Account [#CreateCustomer]

In the **All** **Customers** page, you can search for customers' accounts and modify the search fields as needed.

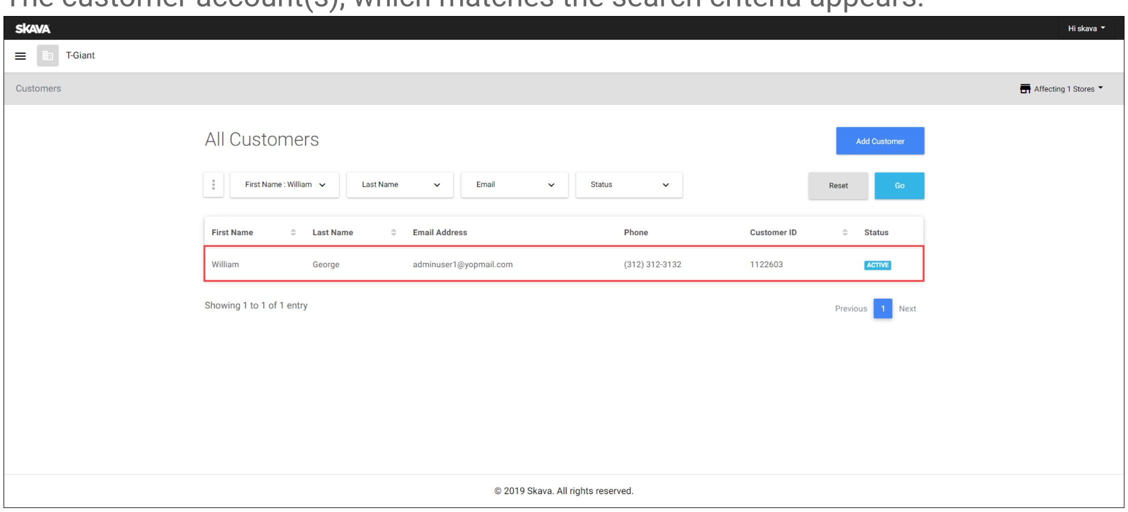
Searching for Customer's Accounts

To search for customer's accounts,

1. Click the **First Name**, **Last Name**, **Email,** or **Status**, drop-down list in the header to open an **entry field** to provide search criteria.
   Note: For displaying a predefined number of orders per screen, see **Row Select** [#RowSelect] .
2. Enter the desired search criteria in the search field, and then click the **Go** button.
   Note: To reset the search field in the header, click the **Reset** button.



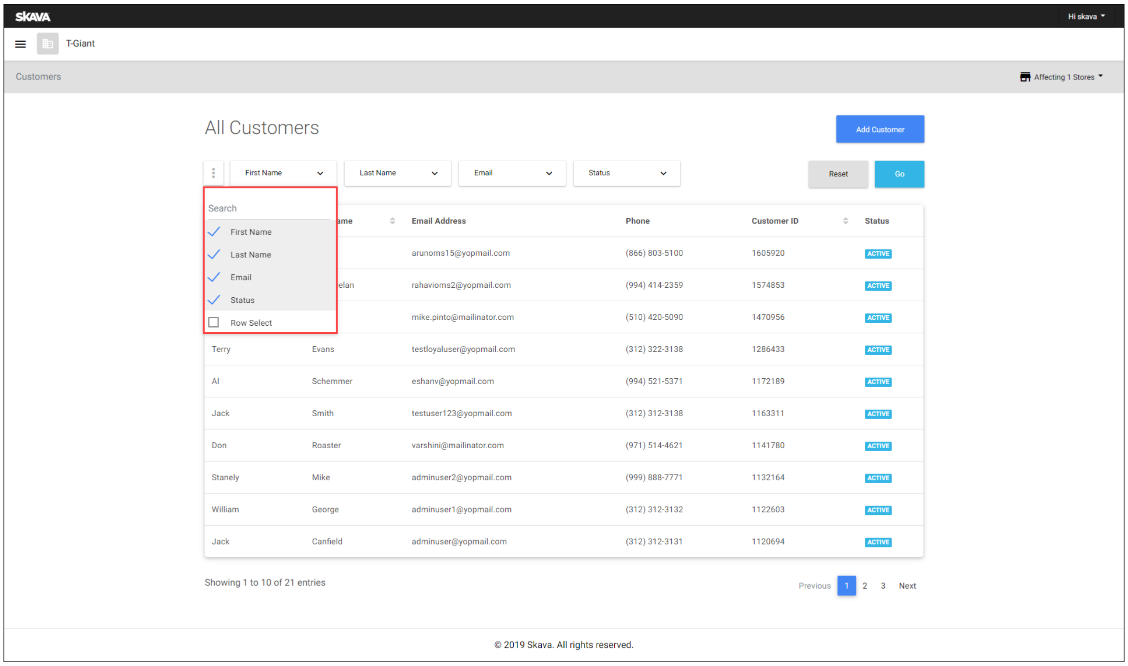
3. The customer account(s), which matches the search criteria appears:



Modifying the Searchable Fields

To modify the searchable fields,

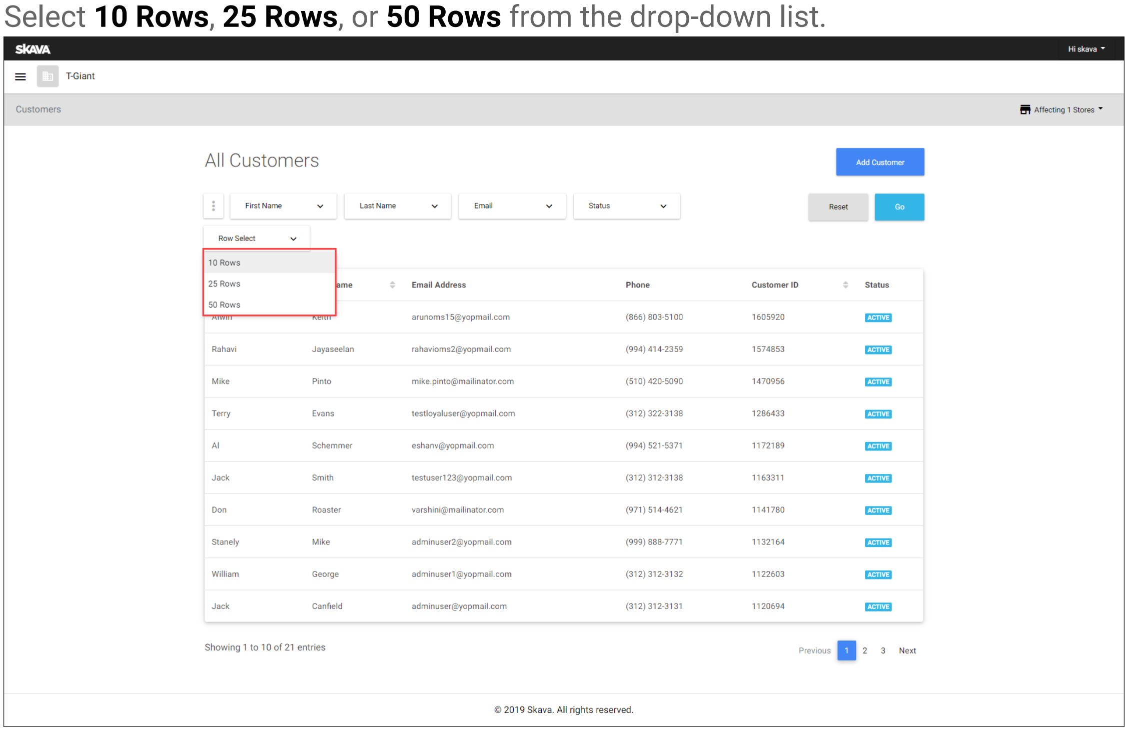
1. Click ⋮ available at the beginning of the search field.
2. Select or deselect the items to add or remove the searchable fields in the header:
   Note: To reset the search field in the header, click the **Reset** button.



[] Selecting Predefined Rows

By default, 10 customer accounts per screen will appear, but the number of customer accounts per screen can be modified as follows:

1. Click ⋮ available at the beginning of the search field, and then select **Row Select** from the Search list.
   The **Row Select** appears as part of the search criteria.
2. Select **10 Rows**, **25 Rows**, or **50 Rows** from the drop-down list.



3. Click the **Go** button. The selected rows of customer accounts appear on the screen.
   Note: To reset the search field in the header, click the **Reset** button.

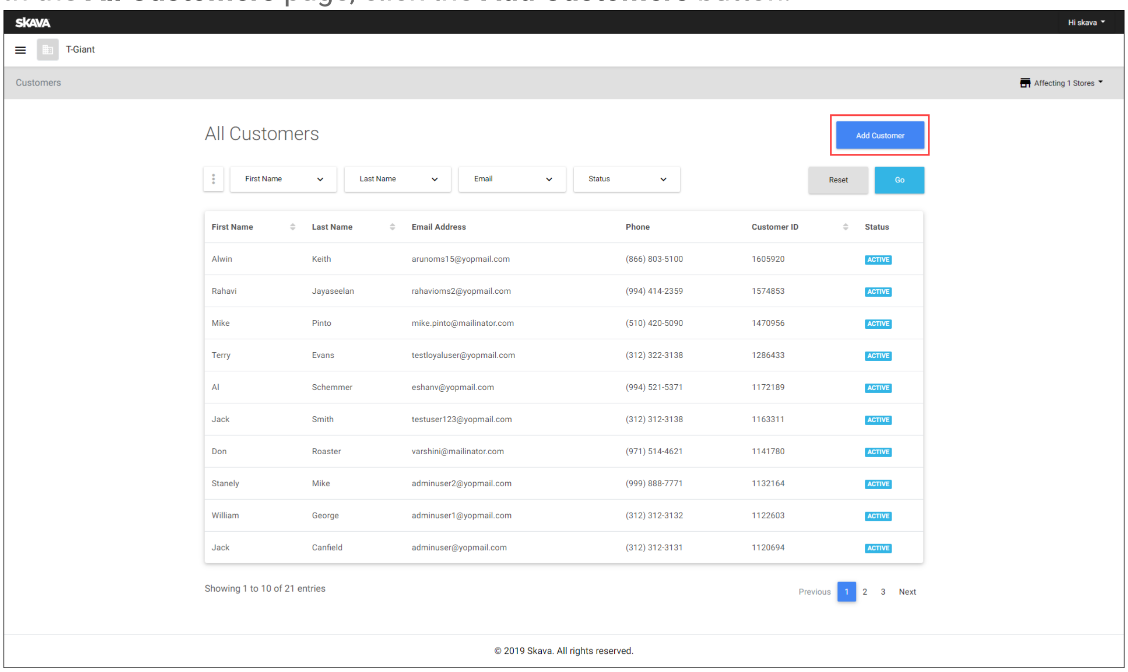
[] Creating a Customer Account

Configuring Search Parameters [#SearchCustomer] | Editing a Customer Account [#EditCustomer]

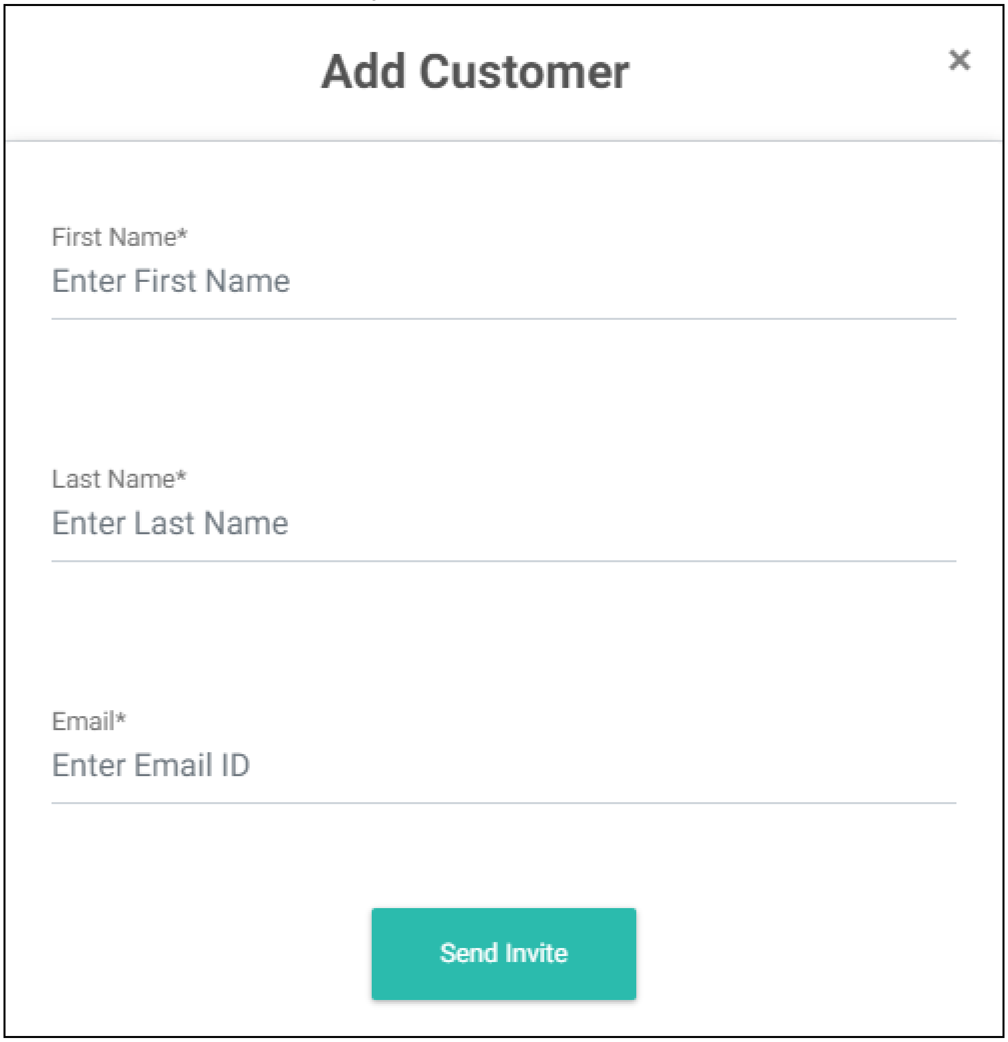
An admin can create a customer account for the business by sending an email invitation to the customer. The customer can complete the account registration process by responding to the invitation.

To create a new customer account,

1. In the **All Customers** page, click the **Add Customers** button.



The **Add Customer** modal opens:



2. Enter the required information in the **First name**, **Last name**, and **Email** fields.
3. Click the **Send Invite** button.
   Note:
   - By default, a customer account is created with the **Pending** status. You can only delete the customer account that is in the **Pending** status.
   - Once the customer completes the account registration process, the customer account status will be changed to **Active** status.

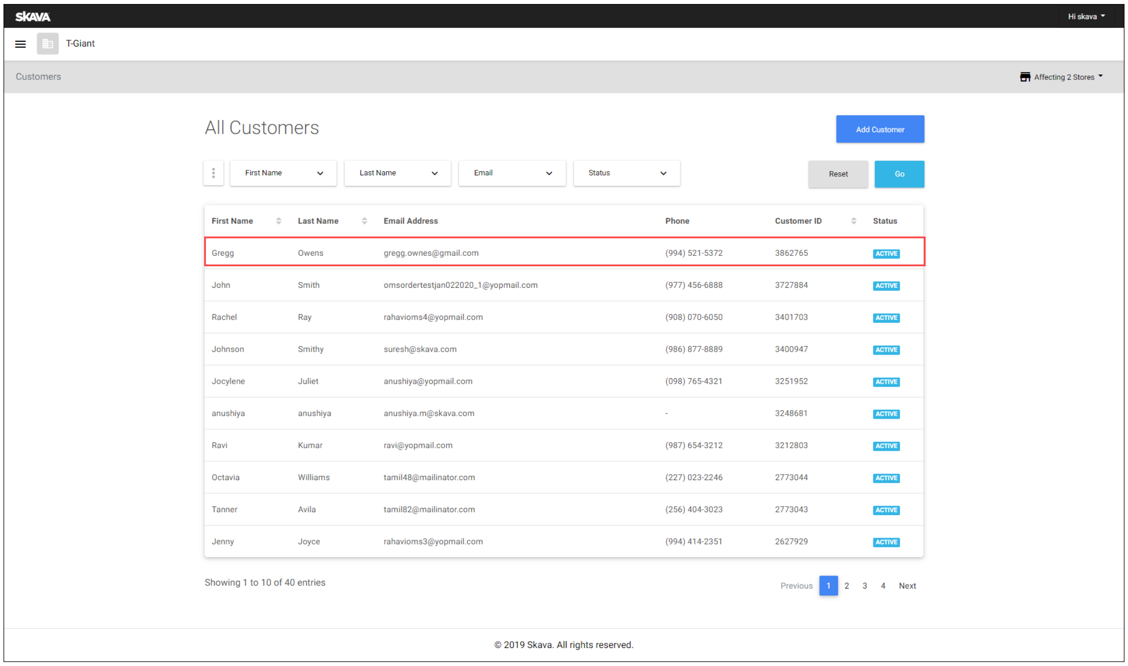
Editing a Customer Account

Creating a Customer Account [#CreateCustomer] | Revision History [#RevisionHistory]

Once the customer completes the account registration process, you can edit the customer account details.

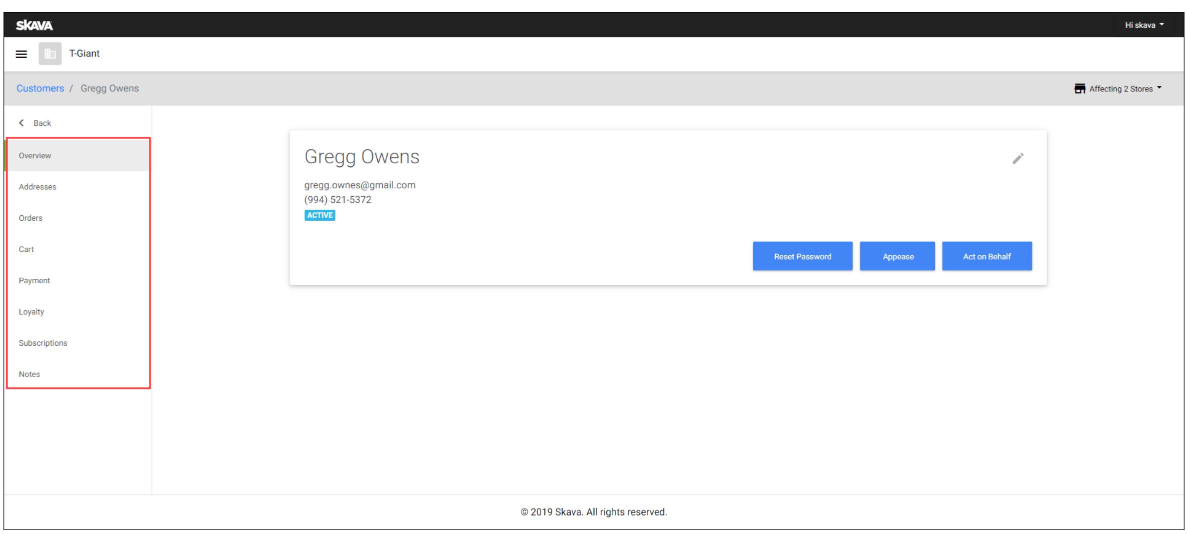
To edit a customer account details,

1. In the **All Customers** page, click the desired customer account row.
   The customer account detail page opens.



[] In the customer account details page, the customer account details can be viewed and updated in the following tabs:

- **Overview** [#Overview]
- **Addresses** [#Addresses]
- **Orders** [#Orders]
- **Cart** [#Cart]
- **Payment** [#Payment]
- **Loyalty** [#Loyalty]
- **Subscriptions [#Subscriptions]**
- **Notes [#Notes]**



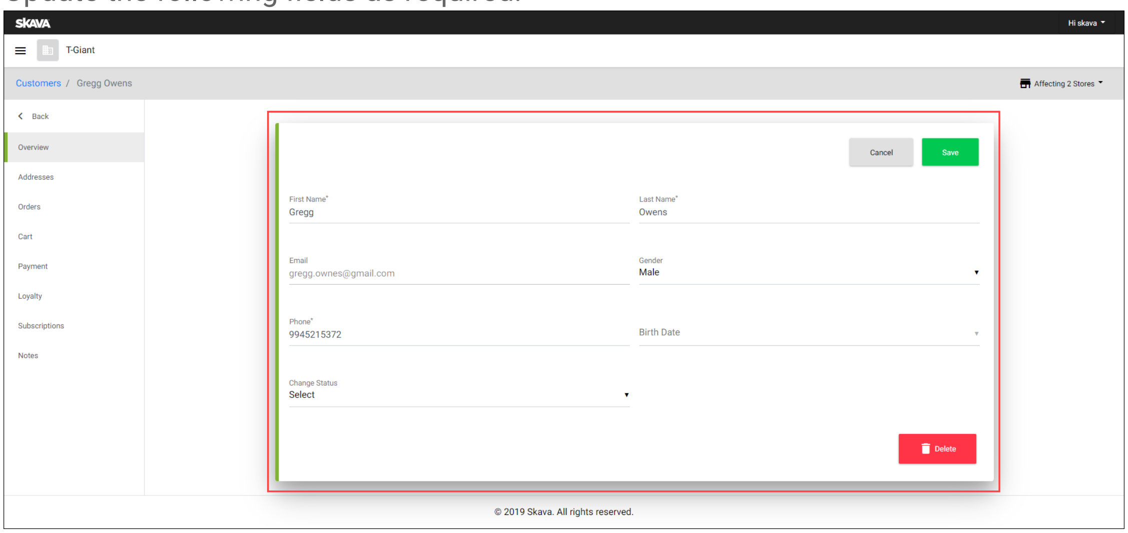
[] Overview Tab

- In the **Overview** tab, you can:
  - edit a customer's profile such as name, email ID, gender, etc. [#EditProfile]
  - delete a customer account [#DelAcc]
  - trigger an email to a customer to reset their password [#ResetPassword]
  - provide appeasement [#Appease]
  - manage a customer's orders on behalf of a customer [#ManageOrder]

[] Editing a Customer's Profile

To edit a customer's profile,

1. Click in the Overview section.
2. Update the following fields as required:



Field	Description
First Name*	Update the first name.
Last Name*	Update the last name.
Email	Indicates the unique email ID of the customer. This field cannot be updated. **Note**: This field can be configured to be editable or non-editable, based on business need. You will only be able to edit the field if its edit collection property [https://developer.skava.com/microservices/customers/customers-collection-properties/] has been set to `true`.
Gender	Update the gender from the drop-down list.
Phone*	Update the contact number. **Note**: This field can be configured to be editable or non-editable, based on business need. You will only be able to edit the field if its edit collection

	property [https://developer.skava.com/microservices/customers/customers-collection-properties/] has been set to `true`.
Change Status	Update the status from the drop-down list. The possible statuses are: • **Activate** – Indicates the active status of a customer account. This status appears when the customer account is inactive or frozen. • **Inactive** – Indicates the inactive status of a customer account. • [] **Freeze** – Indicates the frozen status of a customer account. While a Customer's account is in **freeze** status, NO action should be taken on the account, including sending any communication to the customer. **Note:** To unfreeze the account, the customer must call the business' customer service team to activate the account.

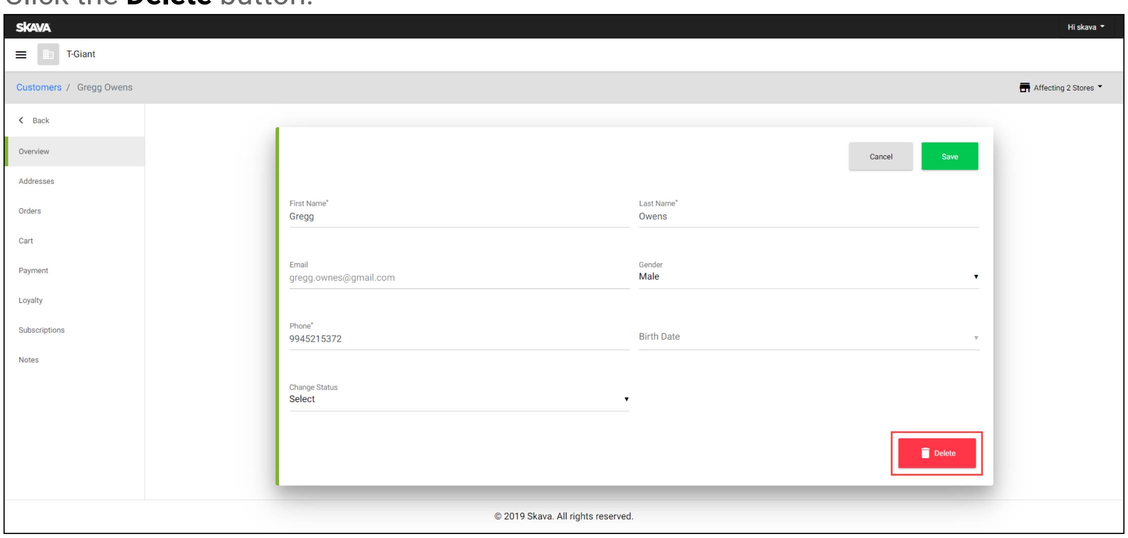
Note: The asterisk (*) symbol indicates mandatory fields.

3. Click the **Save** button.
   Note: To discard the changes, click the **Cancel** button.

[] Deleting a Customer's Account

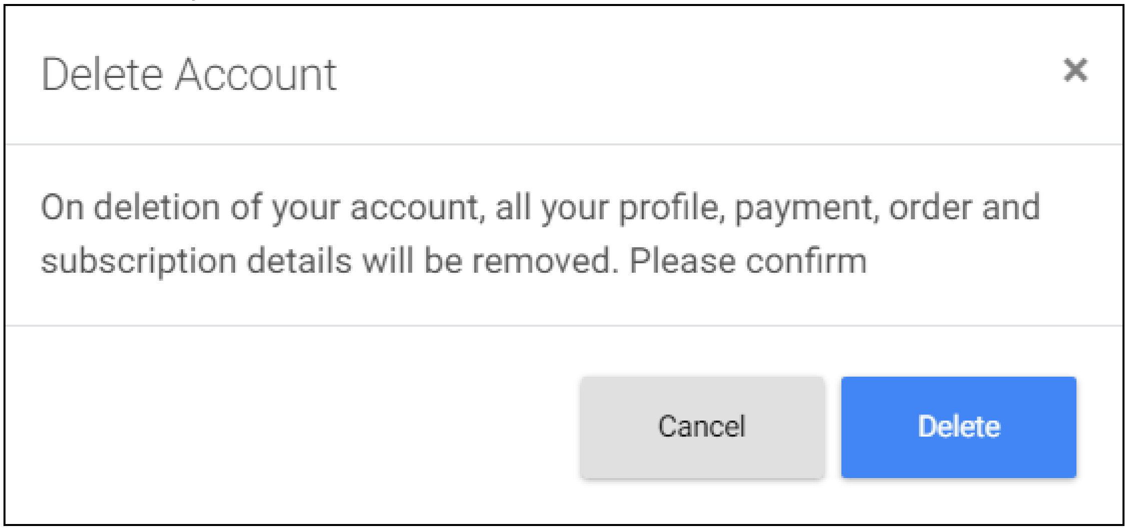
To delete a customer's account

1. Click in the under **Overview** tab.
2. Click the **Delete** button.



3. Click the **Delete** button in the **Delete** modal to confirm the deletion.
   The customer's account status is changed to DELETED and there is no further

action can be performed in this account.

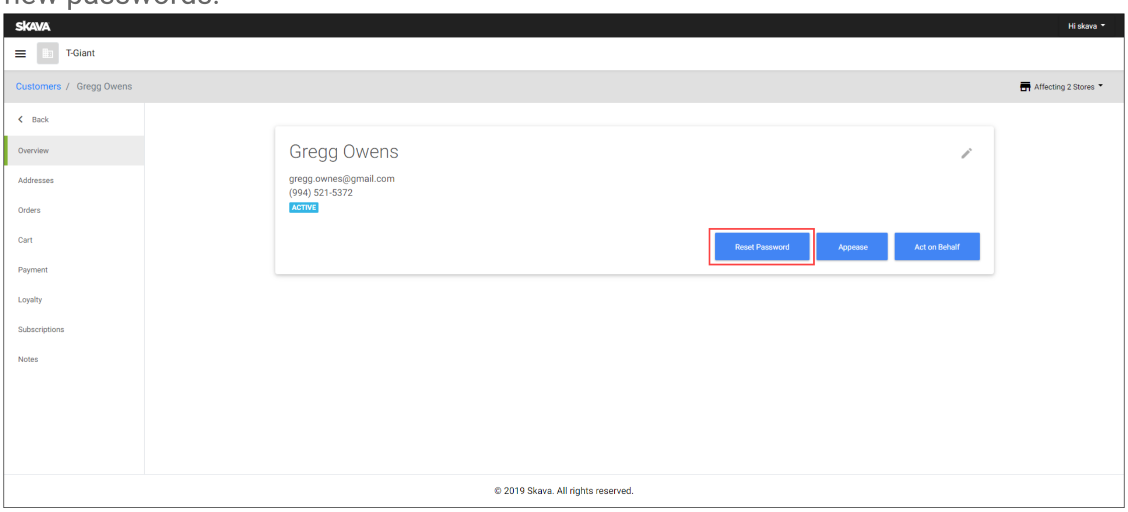


[] Sending a Reset Password Link

In the **Overview** tab, you can reset a customer's account password on behalf of a customer.

To send a reset password link to a customer,

1. Click the **Reset Password** button in the **Overview** section.
   An email with a reset password link will be sent to a customer's registered email to reset their password.
   Note: A customer can click the link and reset their password by providing old and new passwords.



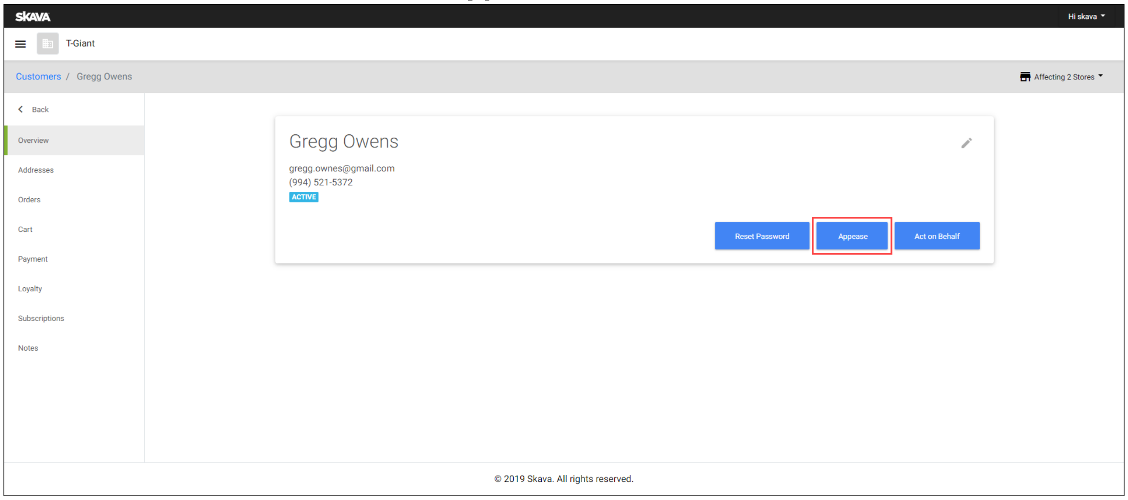
2. Add notes in the **Notes** tab to track the actions that are performed by an admin or CSR on behalf of a customer. For adding notes, see the **Notes** [#Notes] tab.

[] Providing Appeasement by CSR User

Only the CSR User can provide appeasement to the customer. The appeasement can be provided in any form of Loyalty such as reward points or store credits.

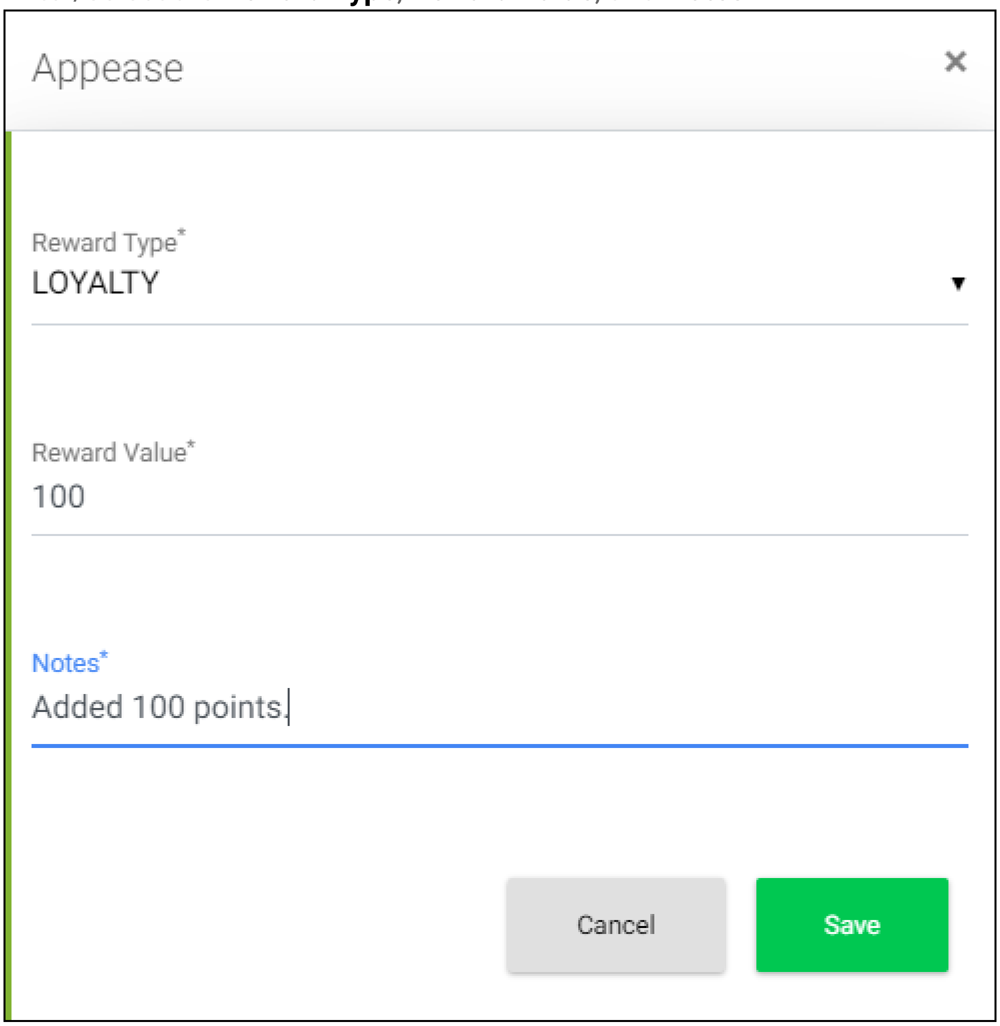
To provide appeasement,

1. In the **Overview** section, click the **Appease** button.



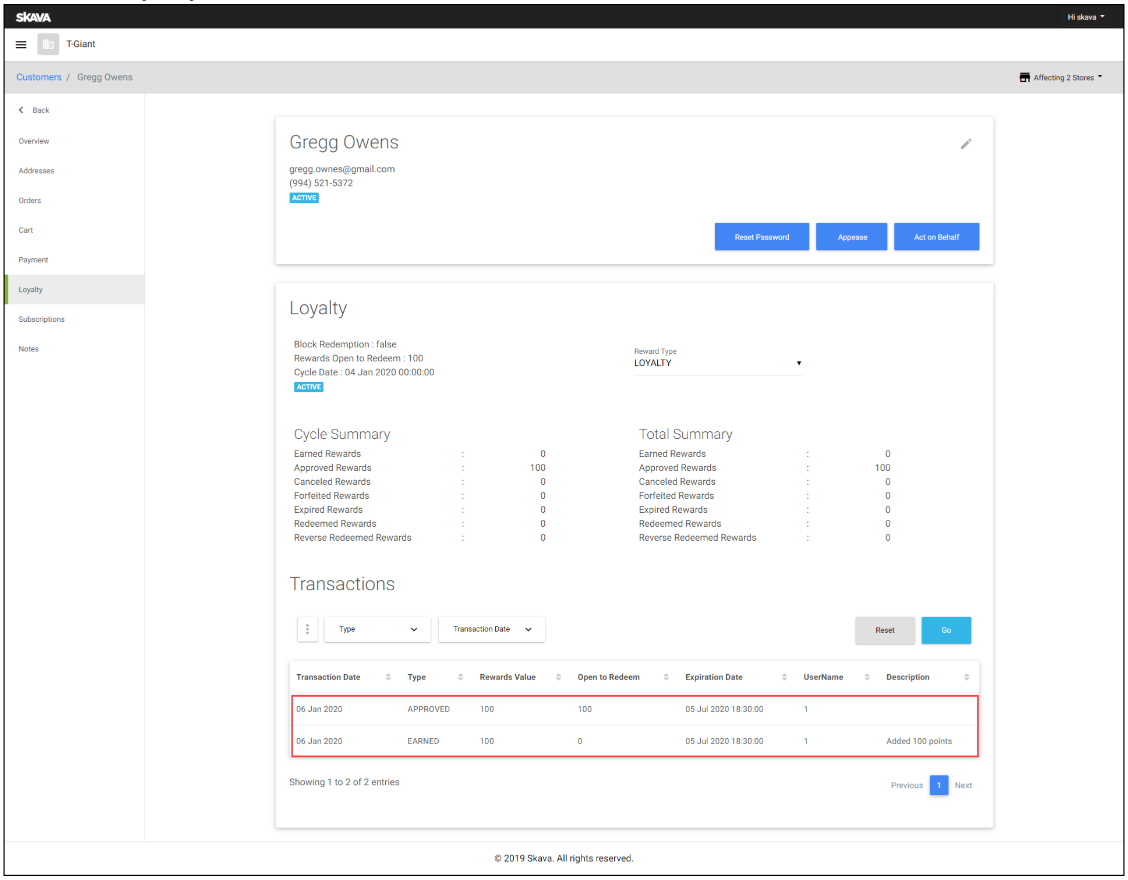
The **Appease** modal appears.

2. Enter/select the **Reward Type**, **Reward Value**, and **Notes**.



3. Click the **Save** button.
   Note: To discard the changes, click the **Cancel** button.
   The transaction is updated under the **Loyalty** tab. For viewing the loyalty transaction,

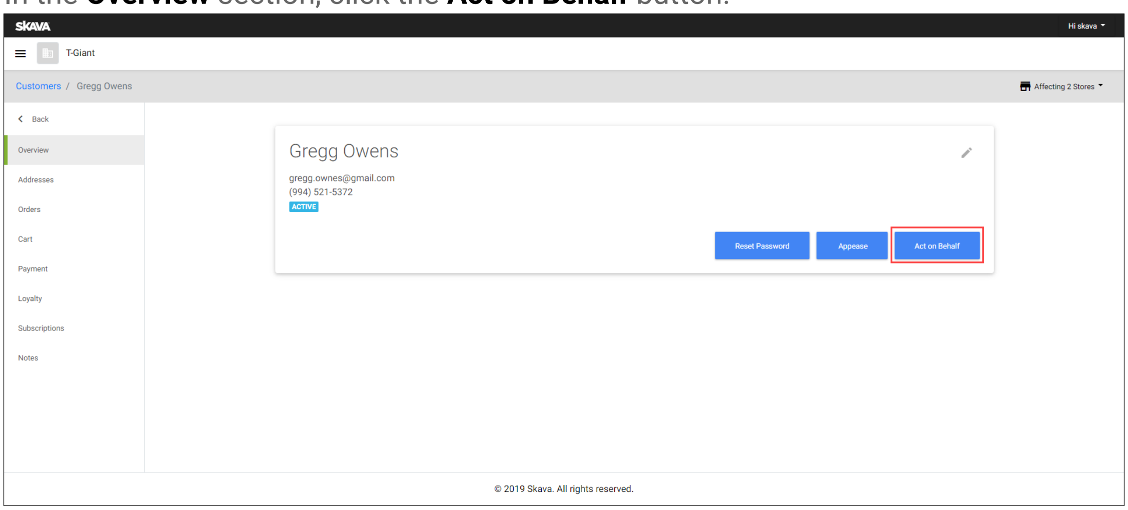
see the Loyalty [#ViewTransaction] tab.



[] Managing a Customer's Order

To manage a customer's order,

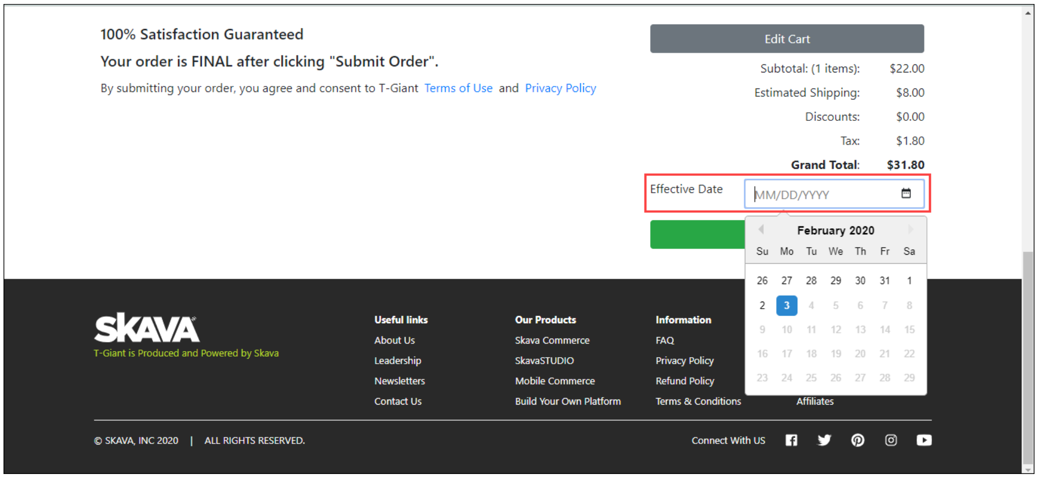
1. In the **Overview** section, click the **Act on Behalf** button.



The page will be redirected to a customer's **Order** page of the Storefront [#Storefront] .

2. In the **Order** page of the Storefront, you can perform the following activities on behalf of the customer:
    - Place an order – A CSR user can place the order(s) or backdated order(s) on behalf of a customer. While placing the backdated order(s), the CSR user can select a past date in the **Effective Date** field (Storefront) to place the order(s)

for a customer.



- Cancel an order or order item by providing the reason
- Return an order or order item by providing the reason
- Partially cancel or return an order or order item by providing the reason.

3. When you perform any activity on behalf of a customer, add notes in the **Notes** tab to track the actions. For adding notes, see the **Notes [#Notes]** tab.

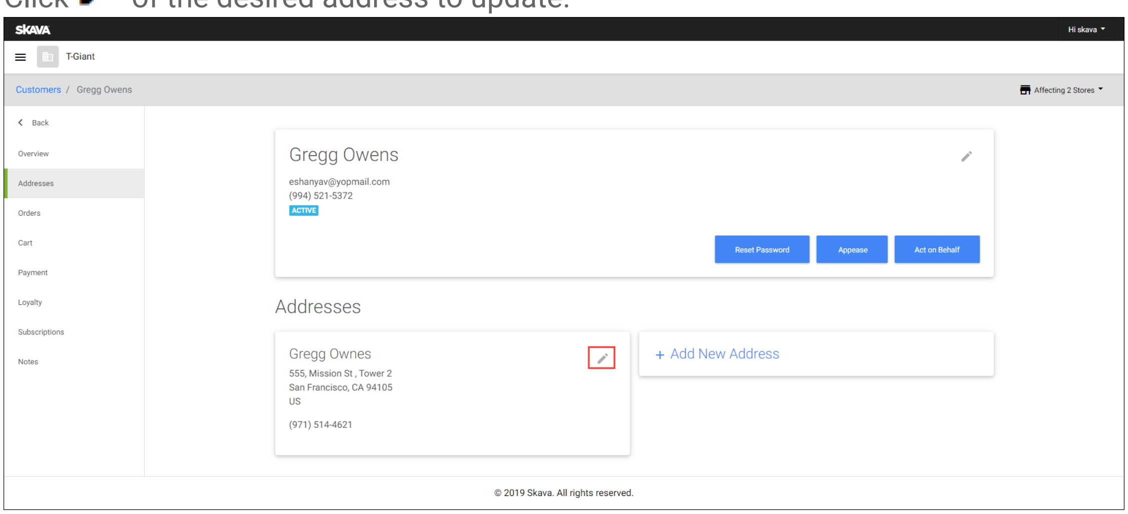
[] Addresses Tab

In the **Addresses** tab, you can manage the customer's addresses. Multiple addresses can be stored for a customer account.

[] Viewing/Editing an Address

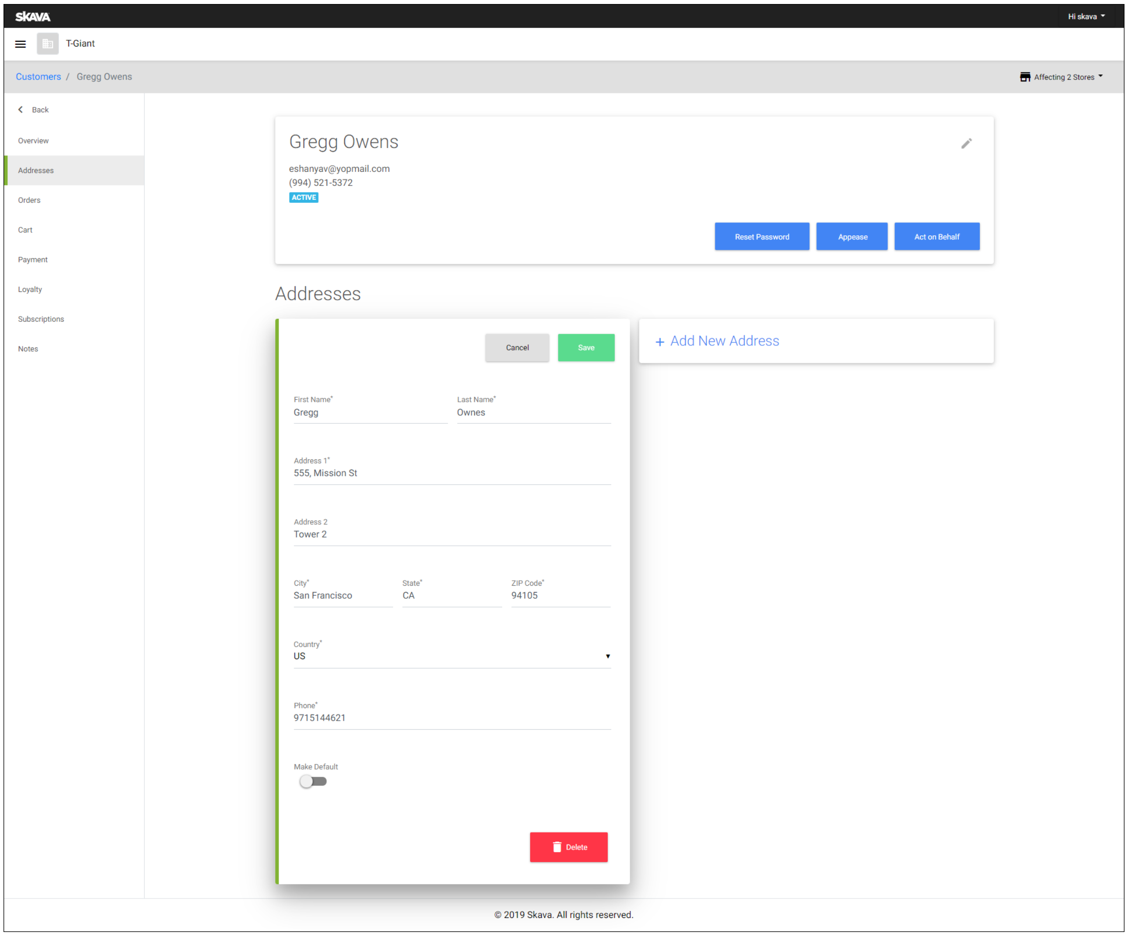
To view/edit an address,

1. Click the **Addresses** tab in the left panel.
   The address(es) that is added to the customer account appears.
2. Click  of the desired address to update.



3. Update the necessary address details.

4. If required, enable the **Make Default** slider to make the address as default.
   Note: When a customer account has more than one address, any one of the stored addresses can be set as the default address.



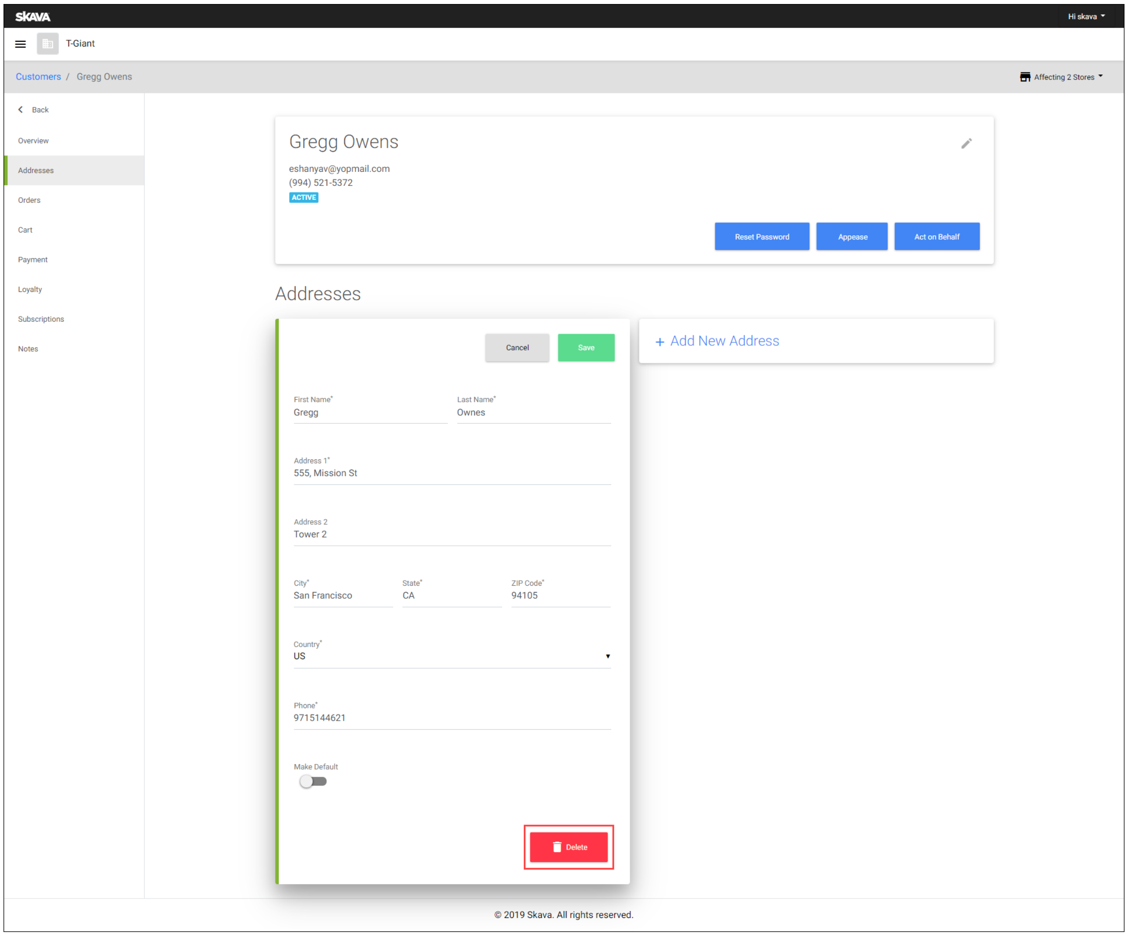
5. Click the **Save** button. The updated address details appear under the **Addresses** tab.
   Note: To discard the changes, click the **Cancel** button.

[] Deleting an Address

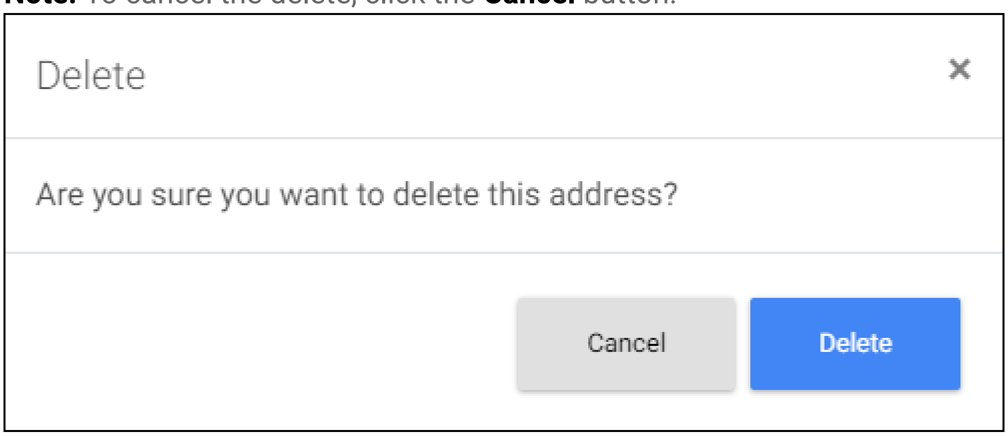
To delete an existing address,

1. Click the **Addresses** tab in the left panel.
2. Click  on the desired address.

3. Click the **Delete** button in the address edit screen.



4. Click the **Delete** button in the **Delete** modal to confirm the deletion. The address does not appear under the **Addresses** tab.
   Note: To cancel the delete, click the **Cancel** button.

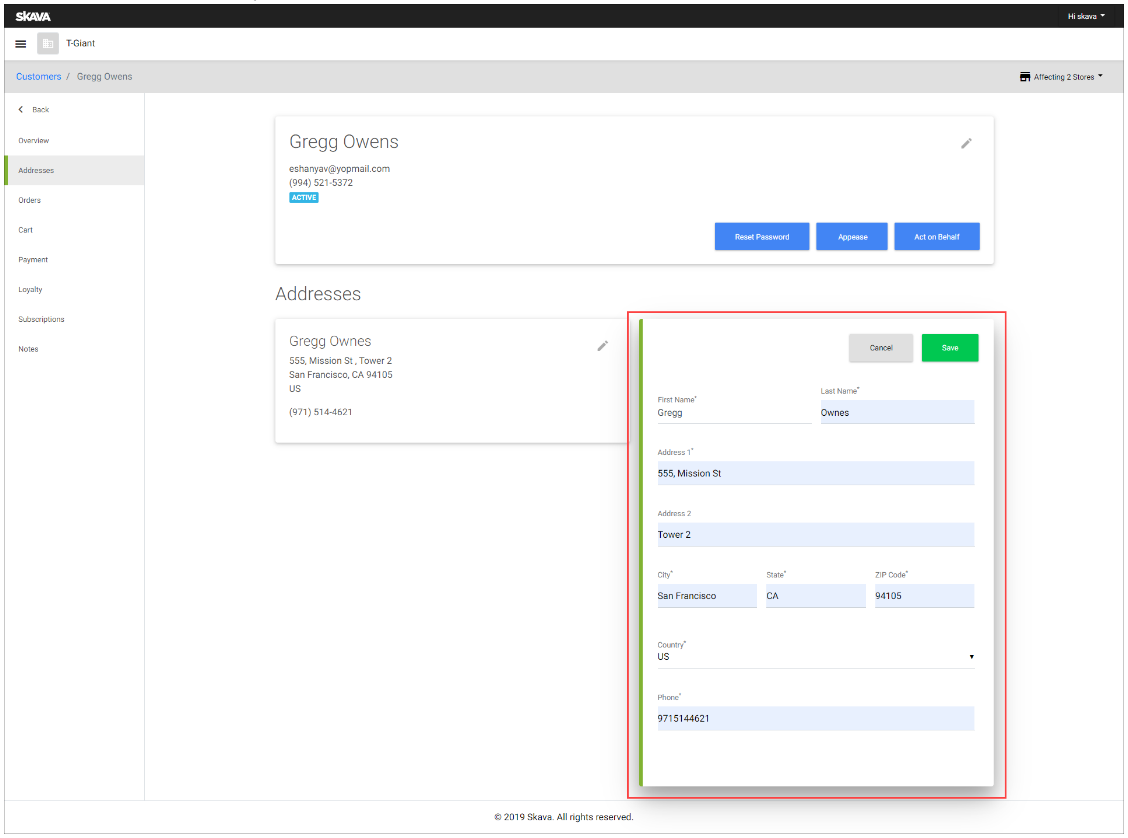


[] Creating an Address

To create an address,

1. Click the **Addresses** tab in the left panel.
2. Click **Add New Address** in the **Addresses** tab.

3. Enter the necessary address details.

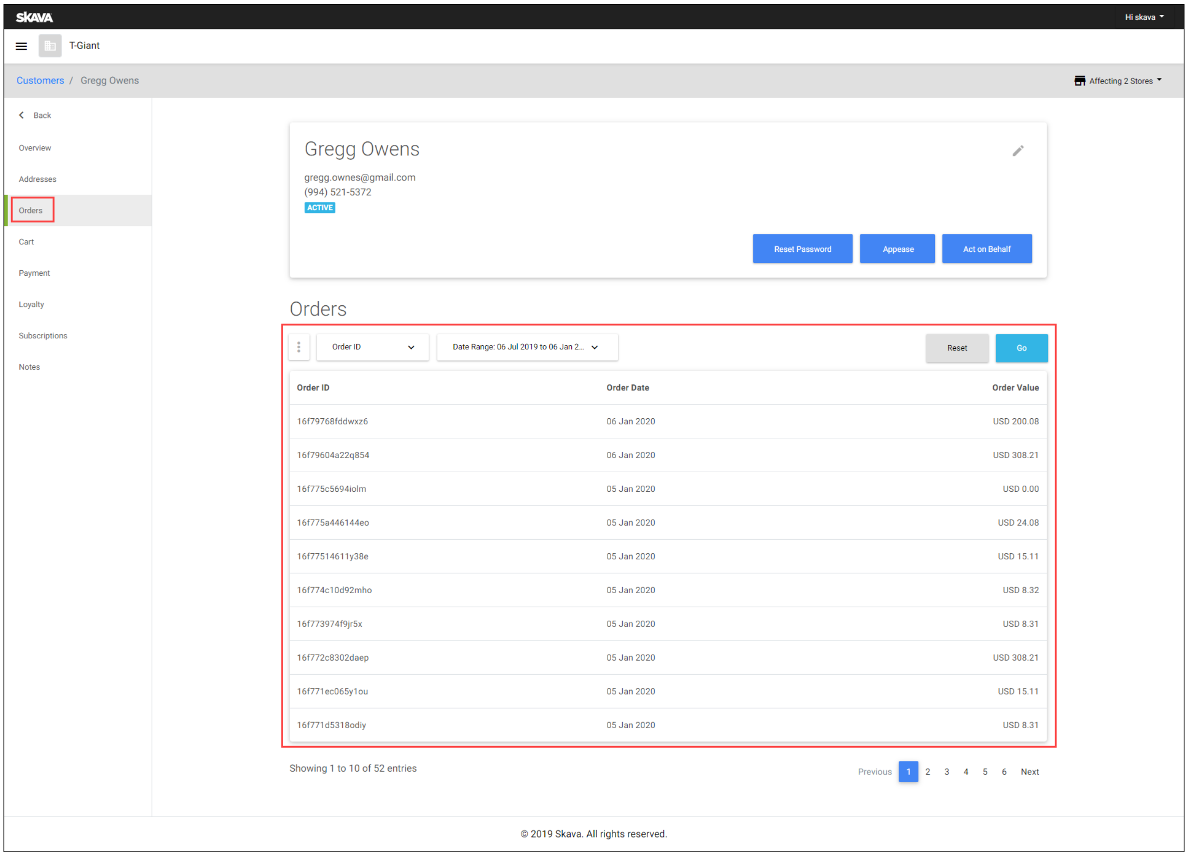


4. Click the **Save** button.
   Note:
   - To discard the changes, click the **Cancel** button.
   - You can add more addresses by following the above procedure.

[] Orders Tab

In the **Orders** tab, you can:

- view a list of customer's orders
- search for orders
- view an order detail [#ViewOrderDetail]

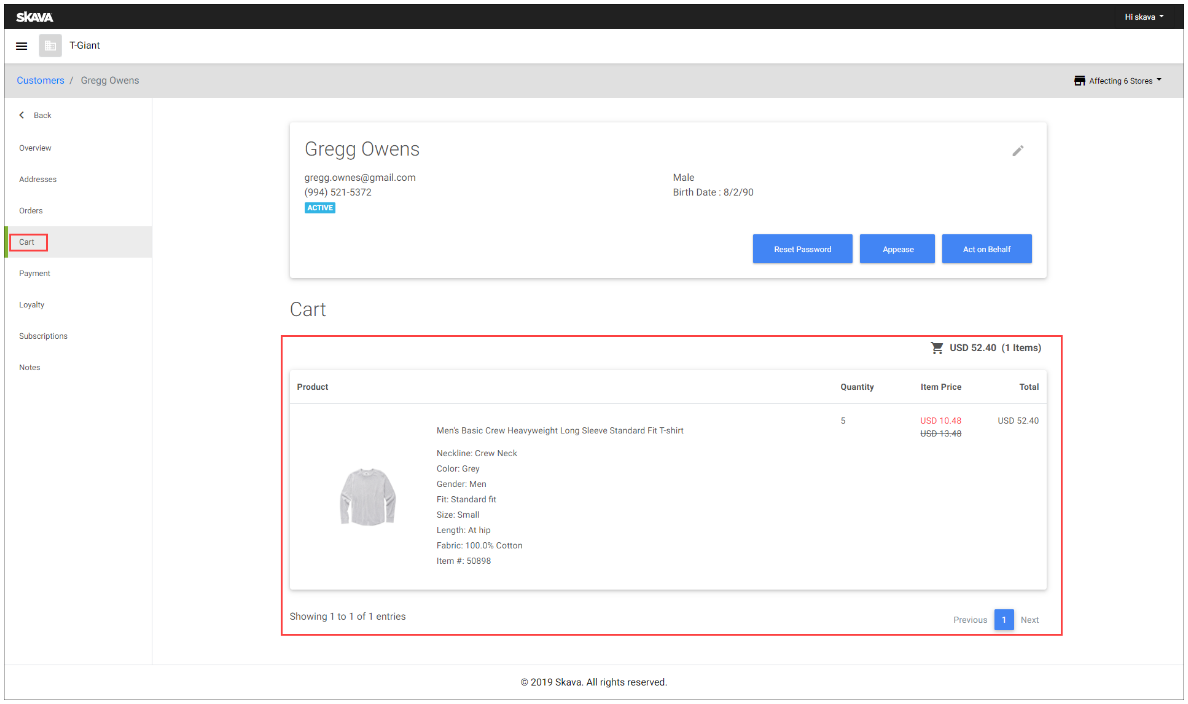


[] To view an order detail,

1. Click the **Order** tab in the left panel.
2. Click a particular order row to see its detail.
   The page will be redirected to the **Orders** page in a new browser. For more detail, see Order [https://developer.skava.com/microservices/order/order-admin-user-guide/#OrderOverview] Admin Guide.
3. In the order detail screen, you can view:
   - order summary in the **Overview** tab
   - product(s) or SKU(s) details in the **Products** tab
   - payment details of the order in the **Payments** tab

[] Cart Tab

In the **Cart** tab, you can view the product(s) or SKU(s) that is added to the customer's cart.



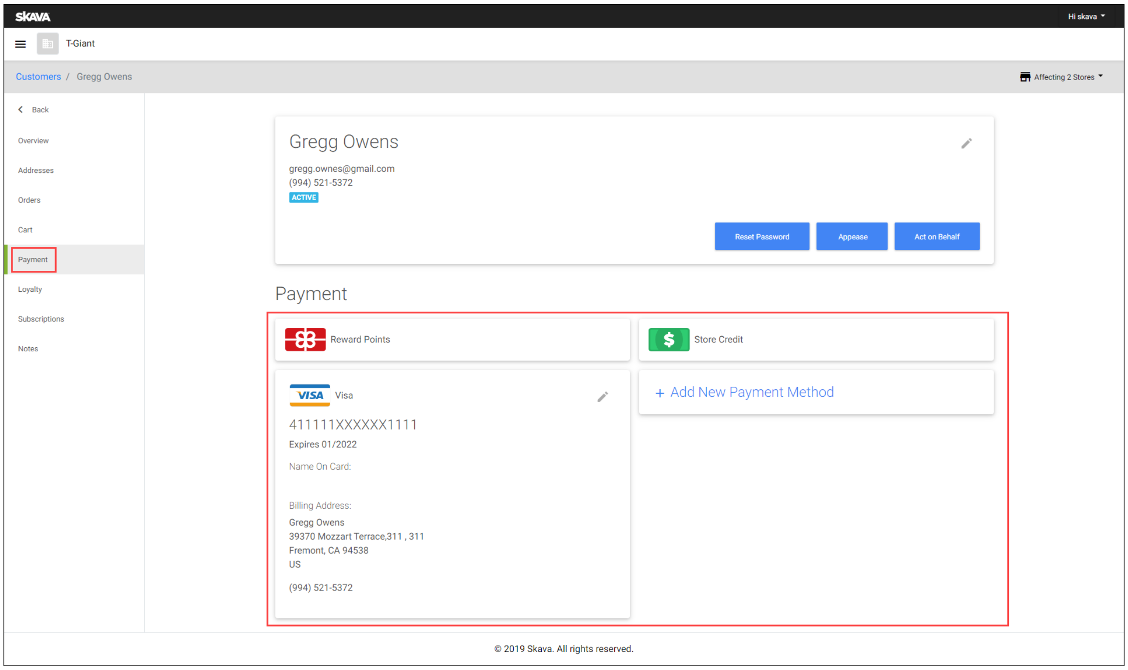
[] Payment Tab

In the **Payment** tab, you can view the payment methods (credit or debit) created by the customer, and view/edit [#EditPayment] , delete [#DeletePayment] , and/or add [#AddPayment] a payment method for a customer in the **Payment** tab. Multiple payment methods can be stored for a customer.

[] Viewing/Editing a Payment Method

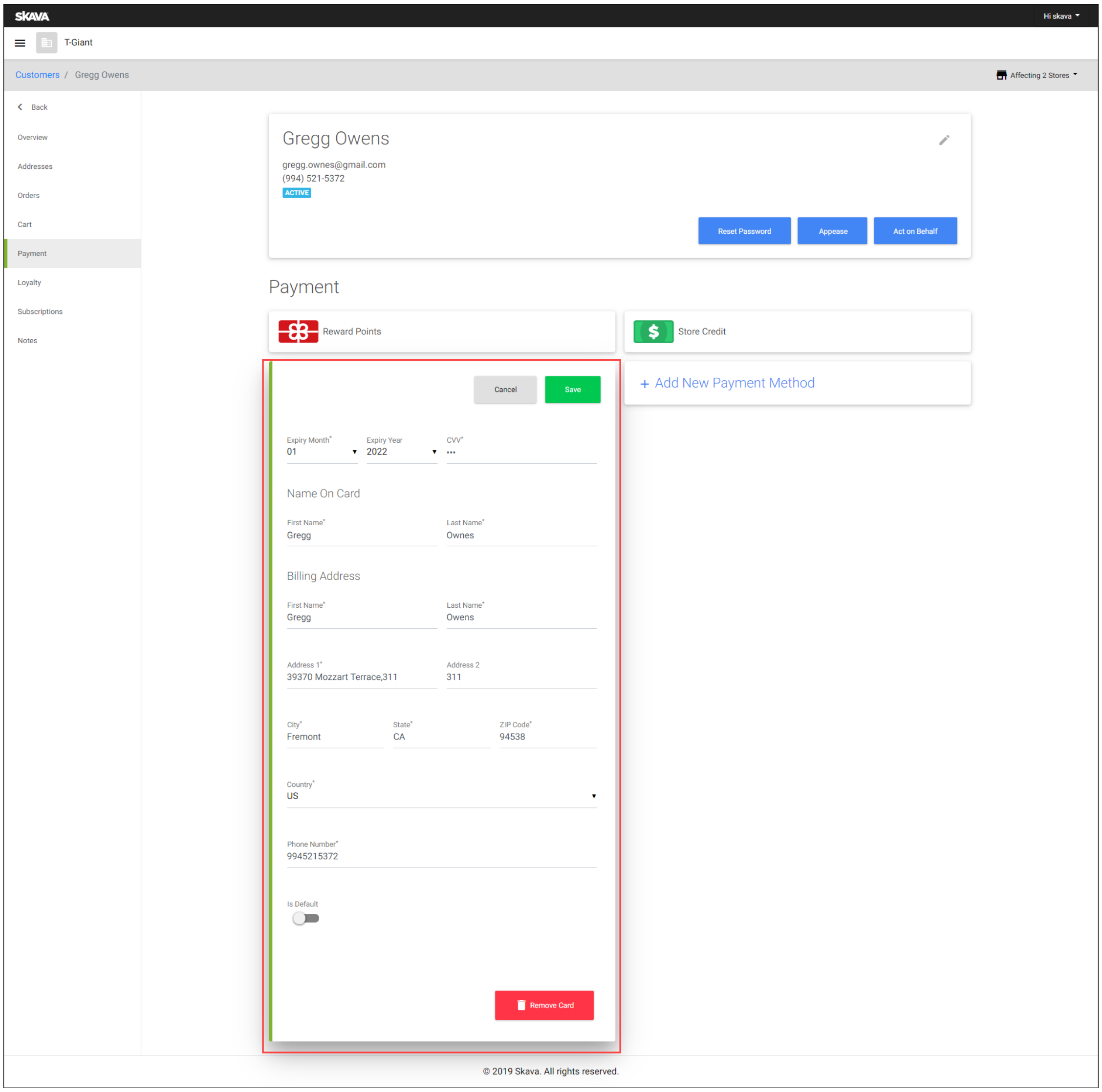
To view/edit a payment method,

1. Click the **Payment** tab in the left panel.
   The payment method(s) that is added by a customer is displayed.



2. Click of the desired payment method to update its details.
3. Update the payment method details as necessary.
   Note: If required, the payment method can be made as default by enabling the **Is**

Default slider.



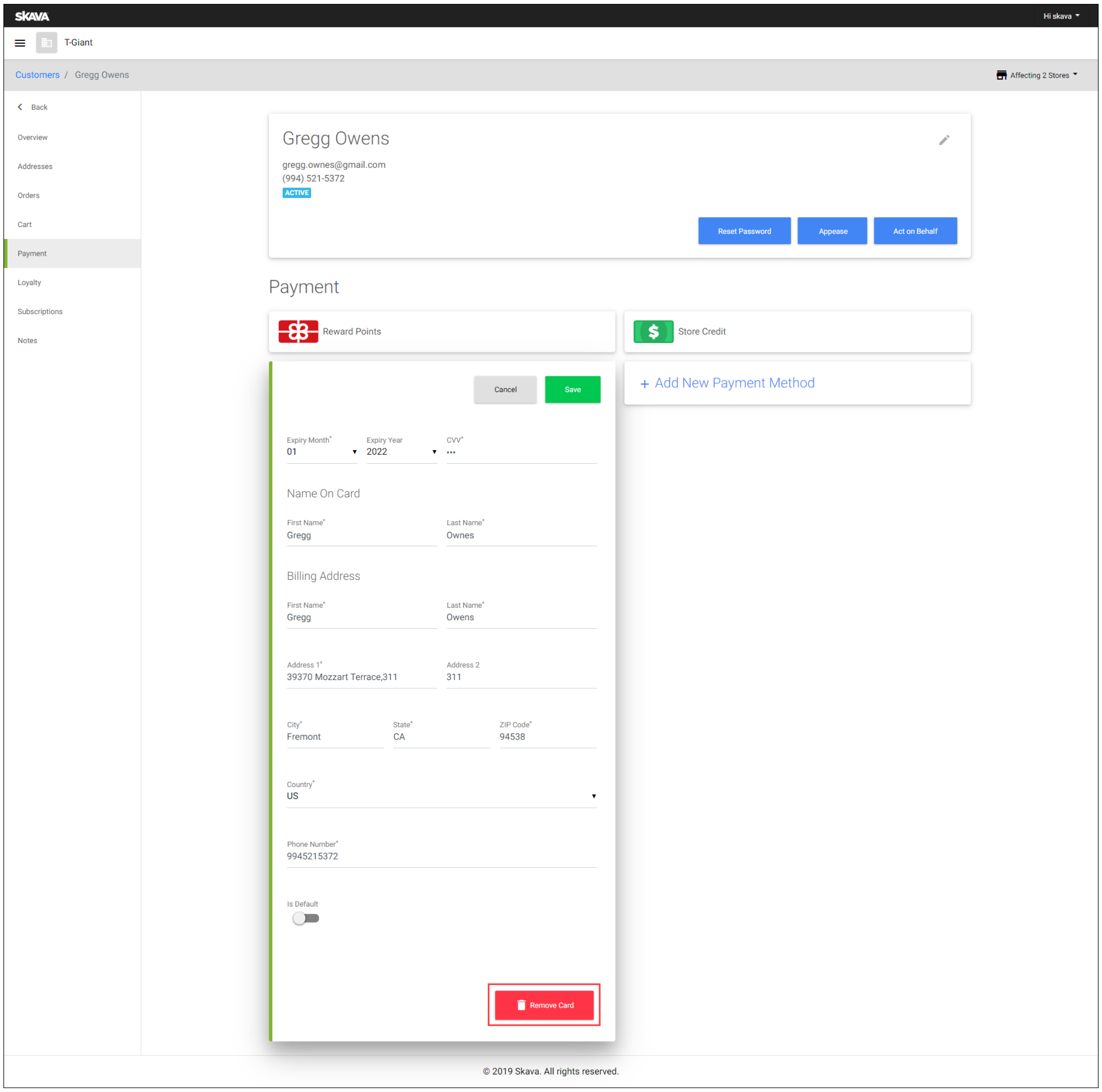
4. Click the **Save** button. The updated payment method appears under the **Payment** tab.
Note: To discard the changes, click the **Cancel** button.

[] Deleting a Payment Method

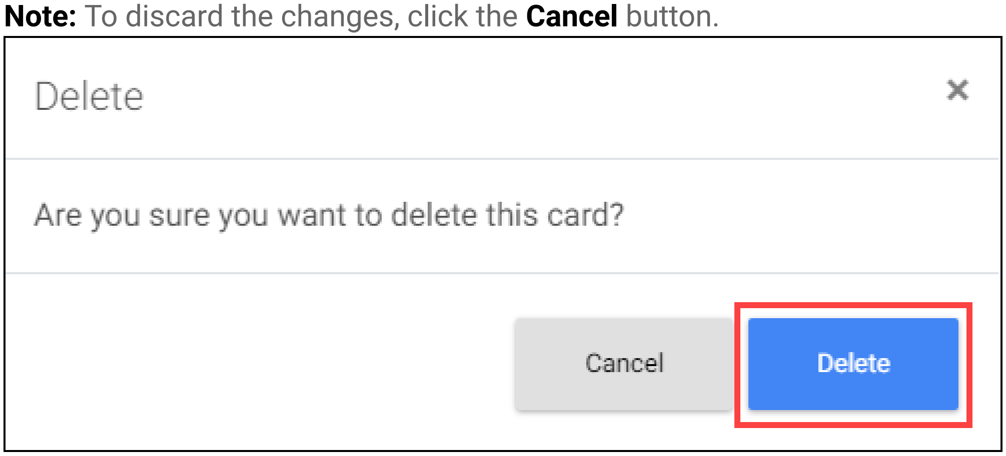
To delete a stored payment method:

1. Click  of the desired payment method.

2. Click the **Remove Card** button.



3. Click the **Delete** button in the **Delete** modal to confirm the deletion.
   The selected payment method is deleted.
   Note: To discard the changes, click the **Cancel** button.

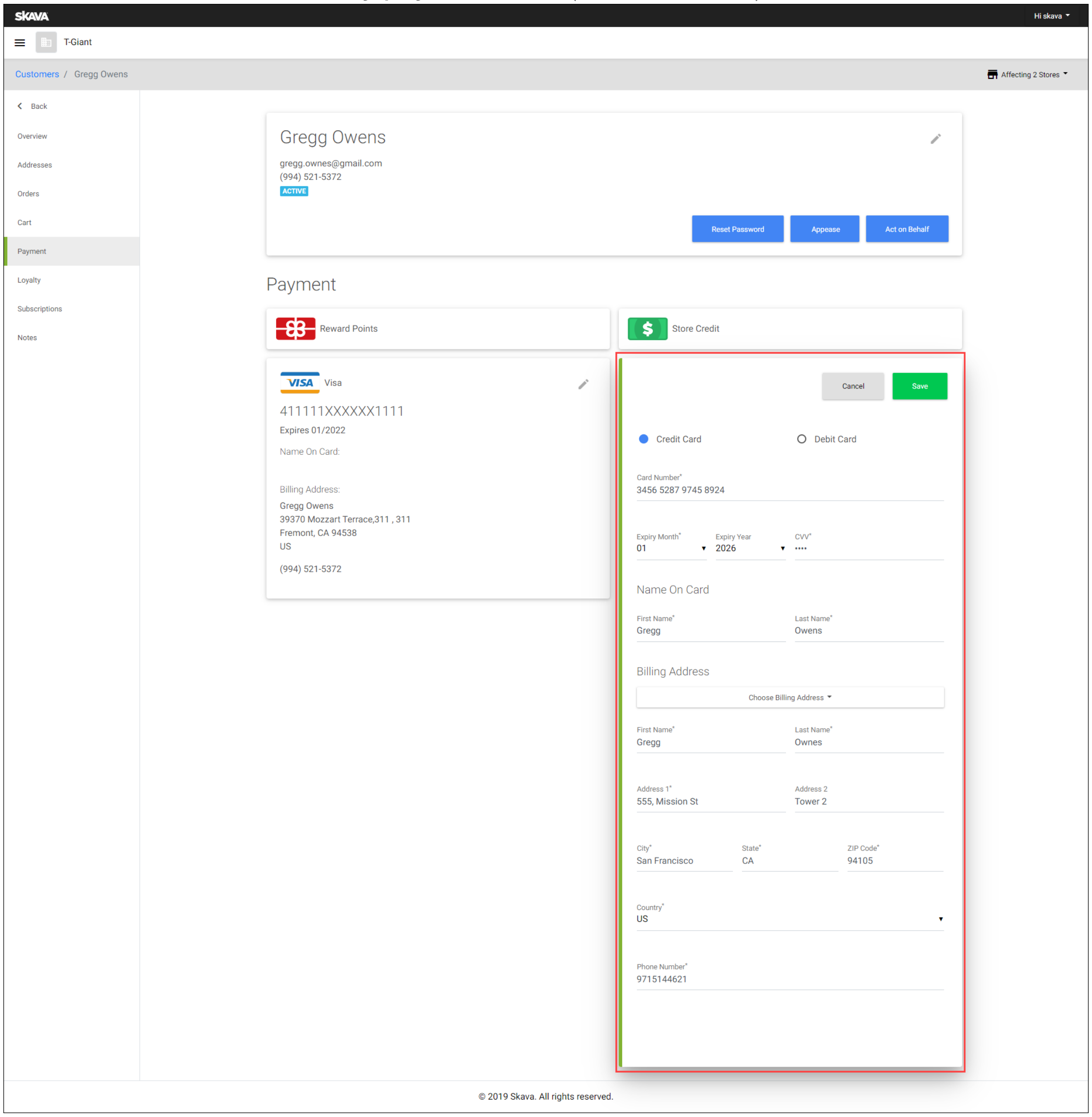


Creating a Payment Method

To create a payment method,

1. Click the **Payment** tab in the left panel

2. Click the **Add New Payment Method** option to add a new payment method for the customer.
3. Enter or select the necessary payment card (credit or debit) information.



4. If the address exists, select the existing address or enter an address manually.
5. Click the **Save** button.

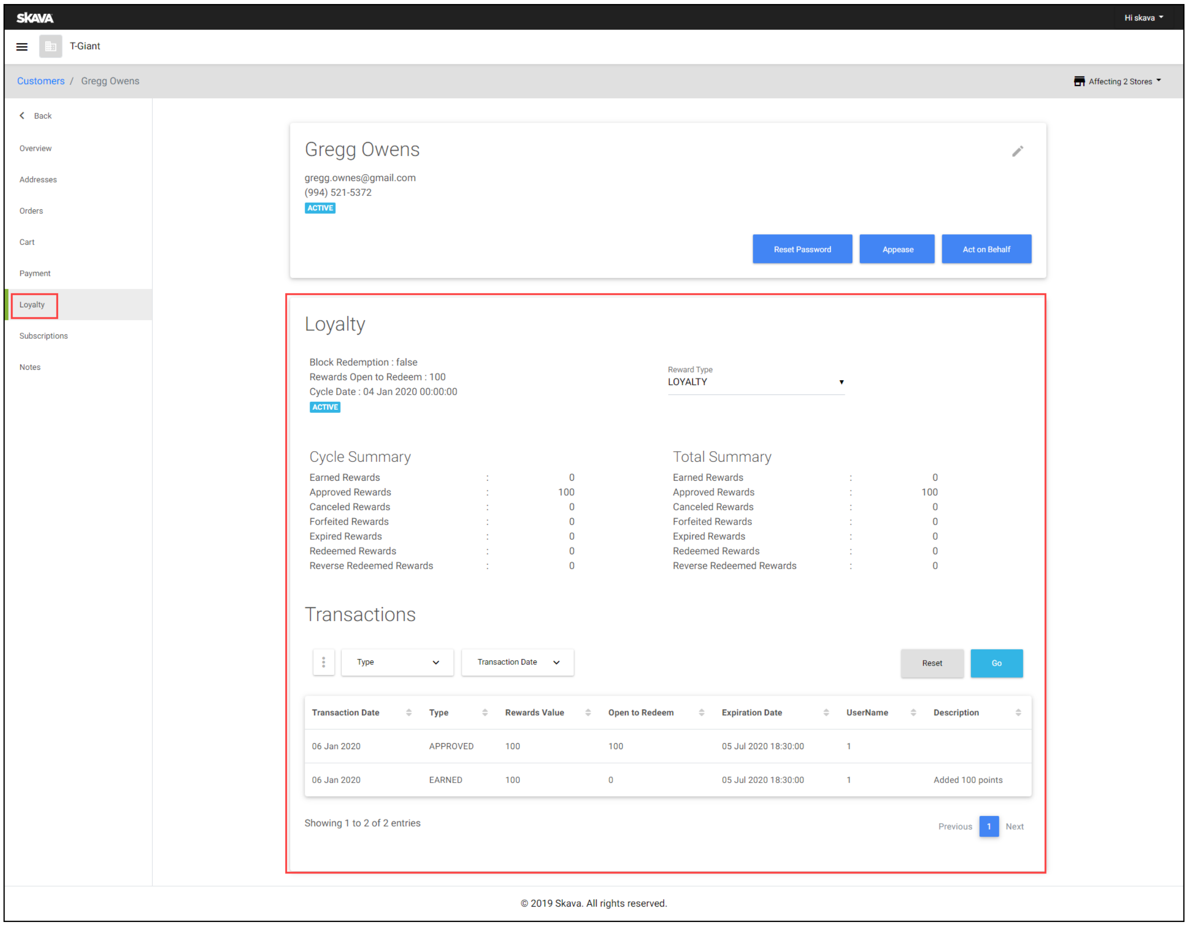
   Note:

   - To discard the changes, click the **Cancel** button.
   - You can add more payment methods by following the above procedure.

[] Loyalty Tab

In the **Loyalty** tab, you can:

- view a customer's rewards summary [#ViewRewardSummary]
- view transactions of the reward [#ViewTransaction]
- search for transactions of the reward [#SearchTransaction]

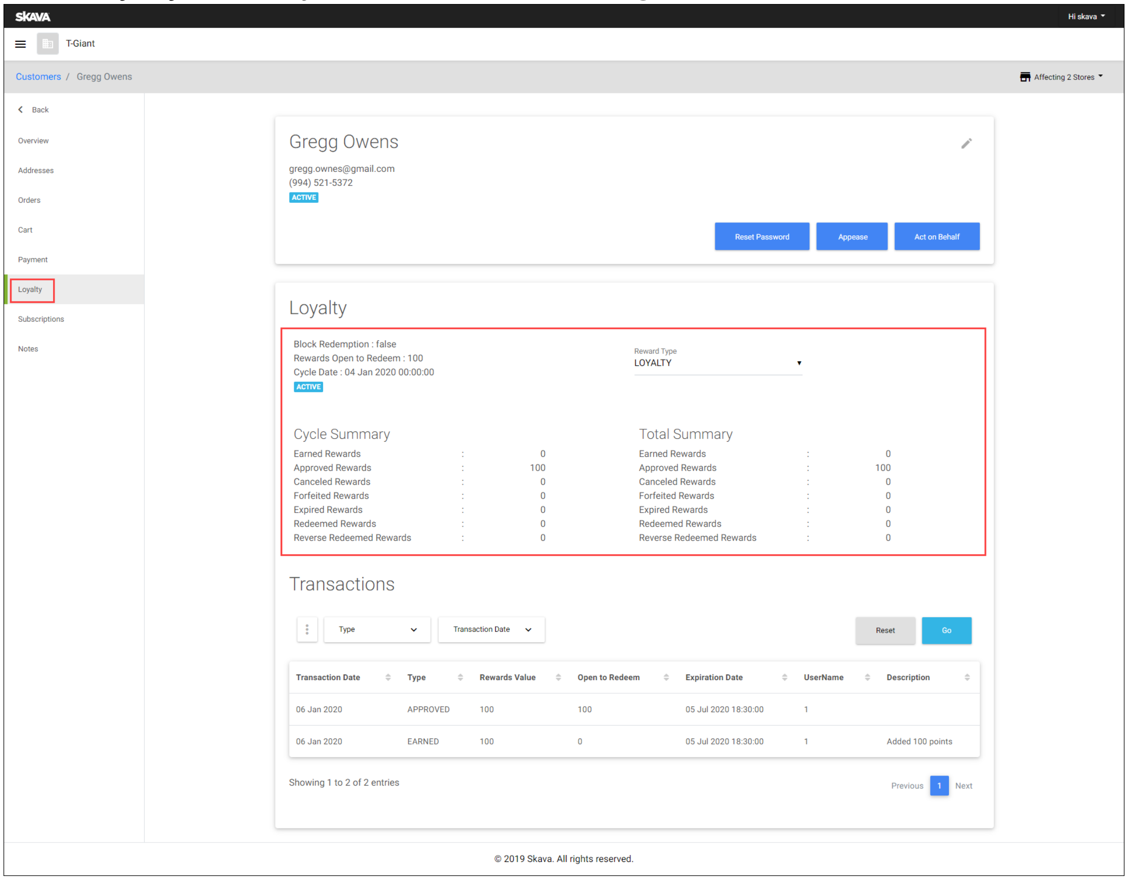


[] Viewing a customer’s rewards summary

To view customer’s rewards summary,

1. Click the **Loyalty** tab in the left panel.

2. In the **Loyalty** section, you can view the following details of the reward:



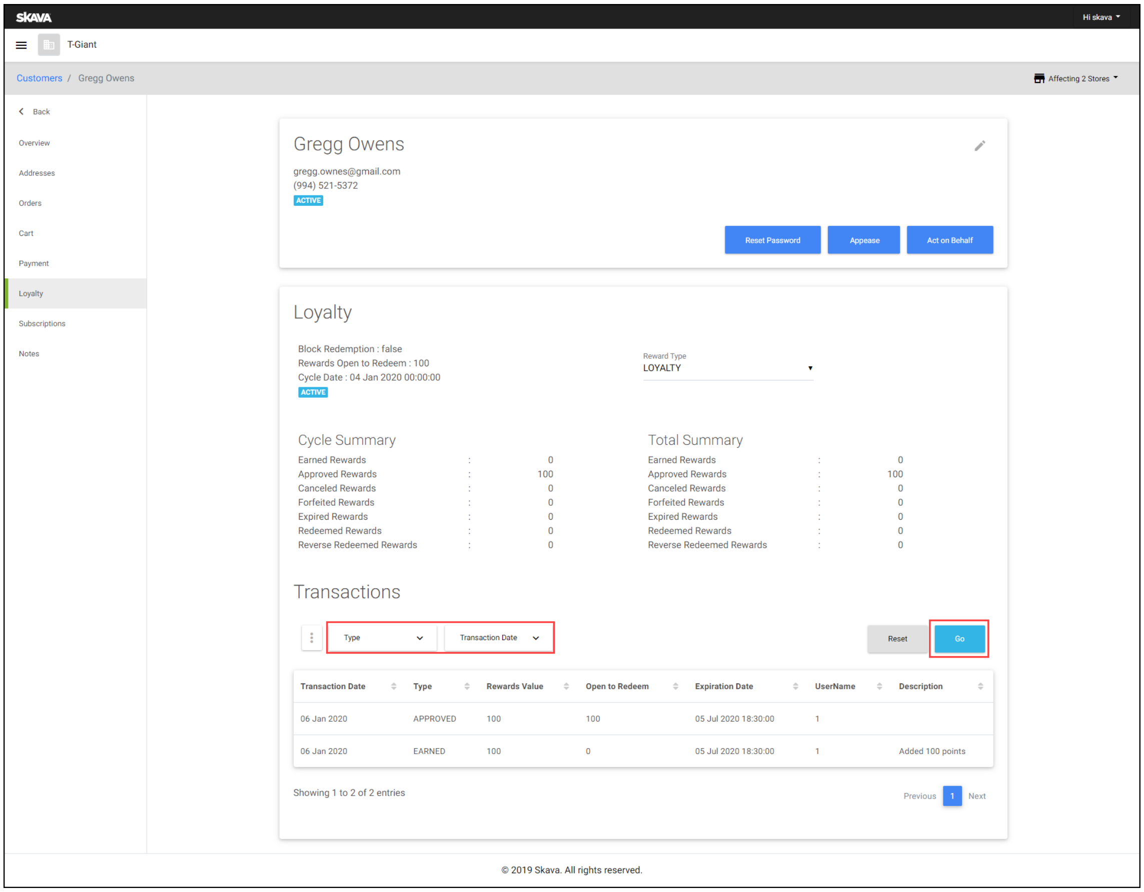
Field	Description
Block Redemption	The ability of a customer to redeem rewards. The possible values are: • `true` – block the redemption • `false` – unblock the redemption
Rewards Open to Redeem	Specifies the total rewards that are available for the redemption.
Cycle Date	Specifies the next cycle date. **Note:** The cycle period is set in the collection properties.
Active	Specifies the reward status.
Reward Type	Specifies the type of rewards. For example, points, stars, etc.
Cycle Summary	Specifies the summary of rewards that are applicable for the current cycle.
Earned Rewards	Specifies the rewards earned in this cycle.

Approved Rewards	Specifies the approved rewards.
Canceled Rewards	Specifies the canceled rewards.
Forfeited Rewards	Specifies the forfeited rewards (for example, fraud detection, expiration of loyalty points, unused points for a long time, inactivity, etc.).
Expired Rewards	Specifies the rewards that have been expired.
Redeemed Rewards	Specifies the rewards that are redeemed.
Reverse Redeemed Rewards	Specifies the reversed rewards that are redeemed.
Total Summary	Specifies the summary of total rewards that are earned and transacted till date.
Earned Rewards	Specifies the rewards earned till date.
Approved Rewards	Specifies the approved rewards.
Canceled Rewards	Specifies the canceled rewards.
Forfeited Rewards	Shows the forfeited rewards (for example, fraud detection, expiration of loyalty points, unused points for a long time, inactivity, etc.).
Expired Rewards	Specifies the rewards that have been expired.
Redeemed Rewards	Specifies the rewards that are redeemed.
Reverse Redeemed Rewards	Specifies the reversed rewards that are redeemed.

[] Searching for Reward Transactions

To search for reward transactions

- Click the drop-down option on the **Type** and/or **Transaction Date** to provide the search criteria. For displaying a predefined number of orders per screen, see **Row Select** [#LoyalRowSelect] .
- Enter the desired search data and click the **Go** button.
  Note: To reset the search field in the header, click the **Reset** button.

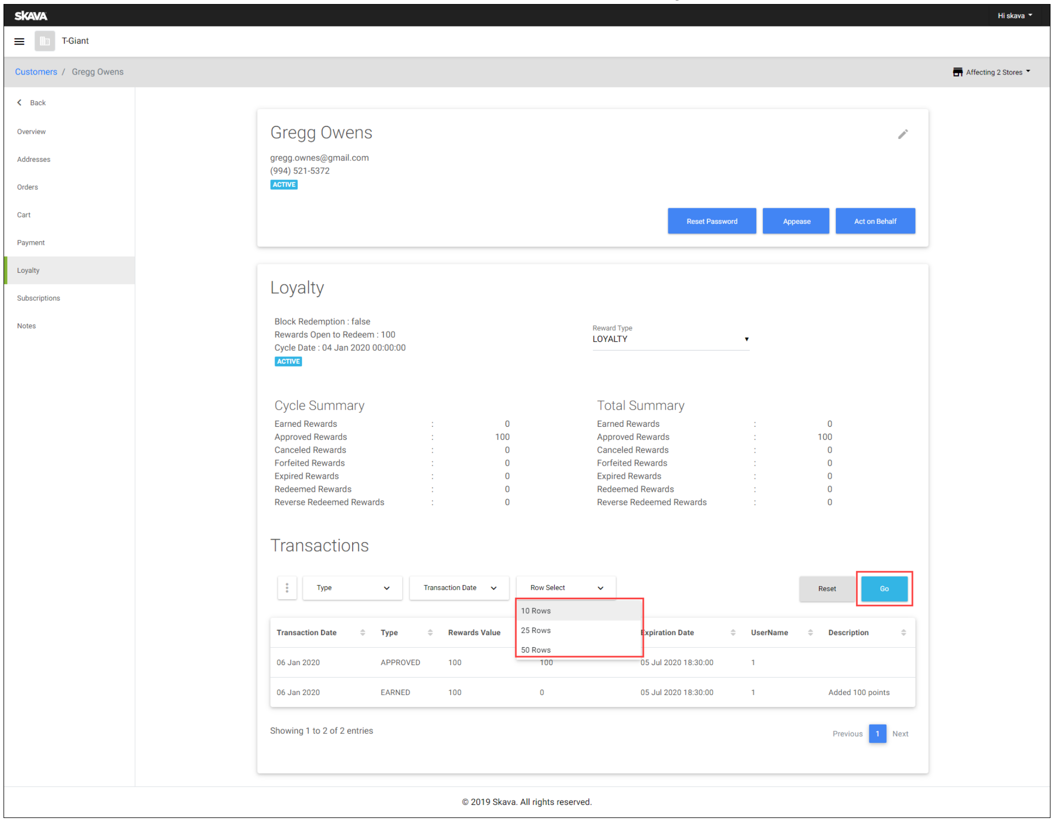


The list of transactions that matches the search criteria will appear.

- By default, 10 transactions per screen will appear, but the number of transactions per screen can be modified as follows:

    1. Click available at the beginning of the search field, and then select **Row Select** from the Search list.
       The **Row Select** appears as part of the search criteria.

2. Select **10 Rows**, **25 Rows**, or **50 Rows** from the drop-down list.



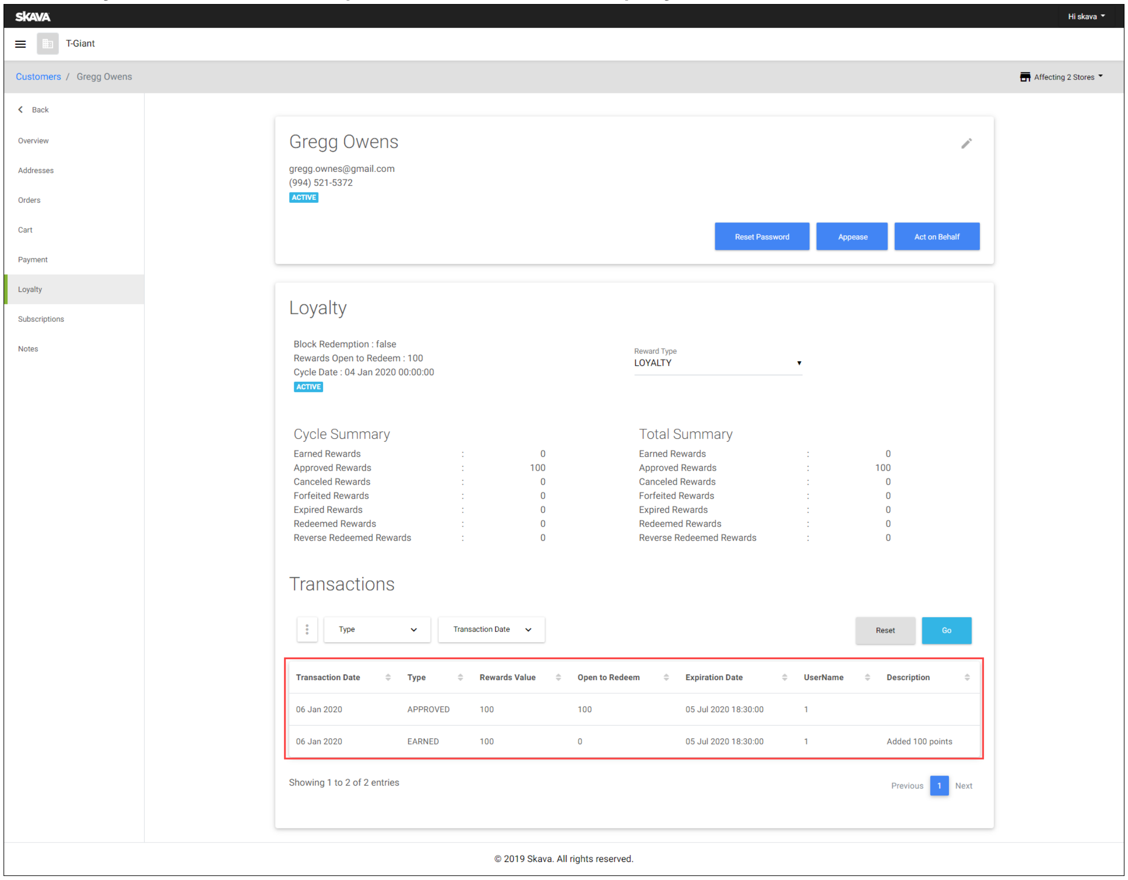
3. Click the **Go** button.

[] Viewing Reward Transactions

[]_To view reward transactions,

1. Click the **Loyalty** tab in the left panel. The reward transactions associated with the customer's account is displayed in the **Transaction** section.

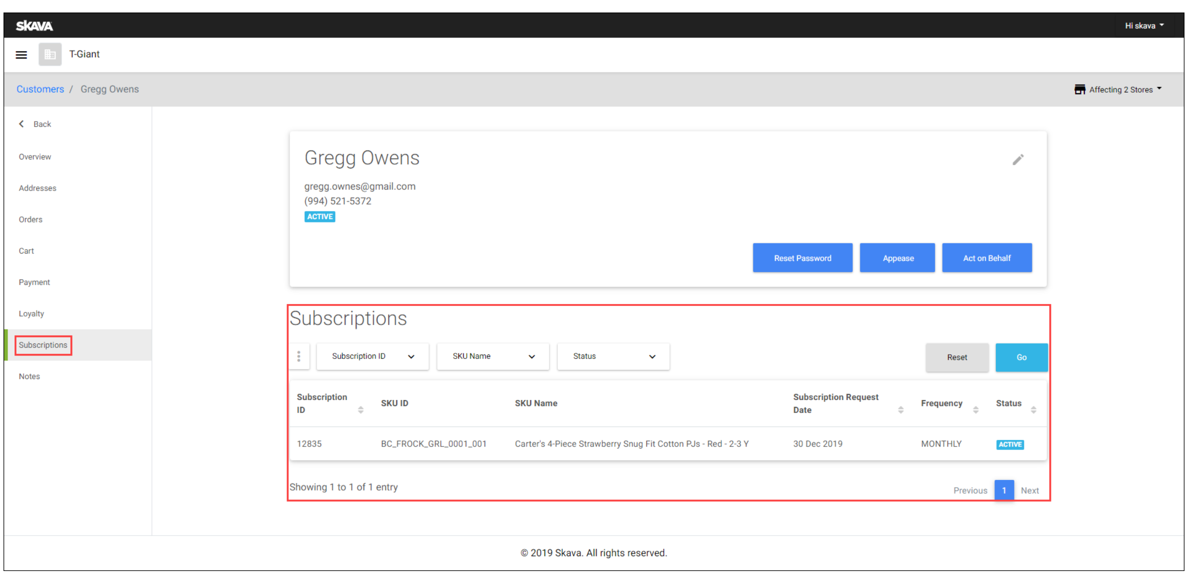
Note: By default, 10 rows per screen will be displayed.



[] Subscriptions Tab

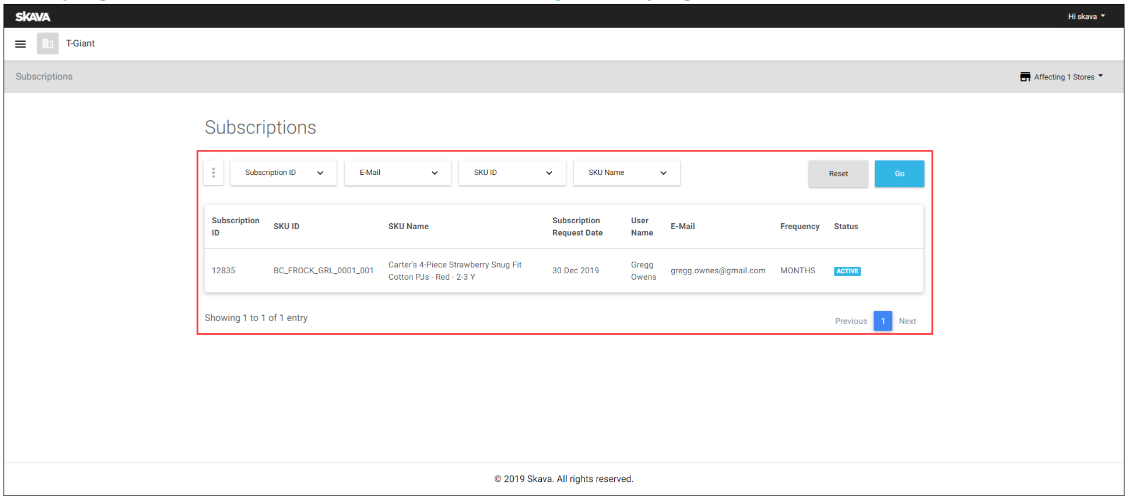
In the **Subscriptions** tab, you can:

- view a list of subscription requests
- search for subscription requests
- manage subscription requests [#ManageSubscription]



[] To manage a subscription request,

1. Click the **Subscriptions** tab in the left panel.
2. Click a particular subscription request row.
   The page will be redirected to the **Subscriptions** page in a new browser.



3. In the Subscriptions page, you can:
   - search for the subscription request(s) of a customer
   - view the subscription request(s) of a customer
   - cancel the subscription request(s) of a customer

   For more detail, see Subscriptions [https://developer.skava.com/microservices/subscription/subscription-admin-user-guide/] Admin Guide.

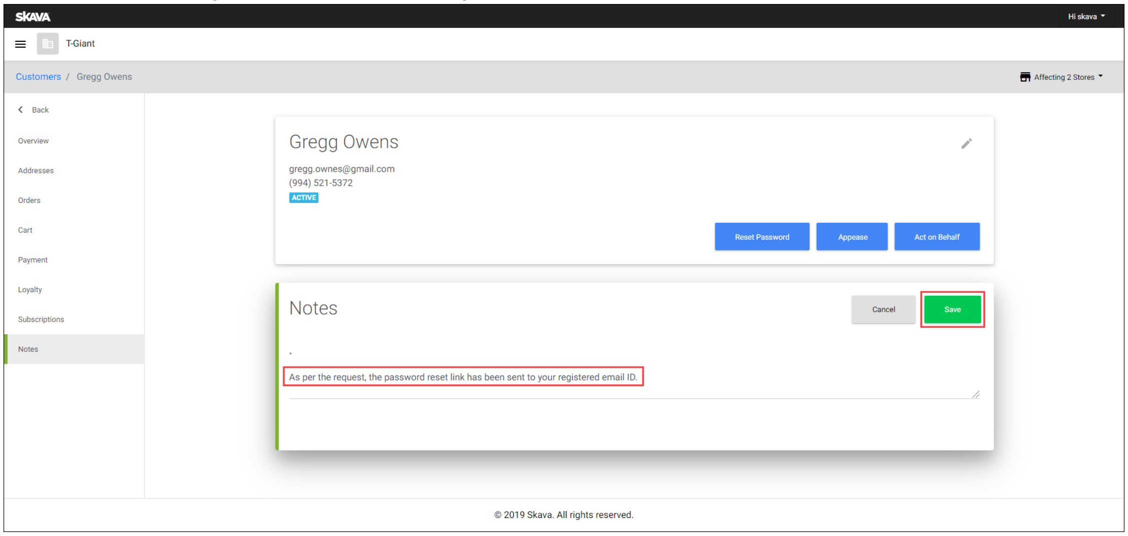
Notes Tab

In the **Subscriptions** tab, you can add notes to track the actions that are performed on behalf of the customer.

To add a note,

1. Click under the **Notes** tab.

2. Enter the description of the action performed for the customer.



3. Click the **Save** button. The note is added under the **Notes** tab.
4. **Note:**
   - To discard the changes, click the **Cancel** button.
   - You can add more notes by following the above procedure.

Editing a Customer Account [#EditCustomer] | top [#top]

[] Revision History
2020-05-25 | JP – Updated the document for Release 8.8.0.
2020-05-04| JP – Updated content for May 2020 release.
2020-03-28| AM – Minor copyedit.
2020-01-31 | AM – Updated content for February 2020 release.
2019-11-26 | AM – Revamped this document and updated content for the December 2019 release.
2019-10-29 | AM – Updated content for November 2019 release.
2019-09-20 | AM – Updated content for September 2019 release.
2019-07-26 | PLK – Copyedits.
2019-07-16 | AM – Updated content for July 2019 release.
2019-06-08 | PLK – Minor copyedit.
2019-05-08 | Mary – Inserted images and minor copyedit.
2019-05-04 | PLK – Updated screenshots and anchor links.
2019-01-21 | PLK – Content uploaded and TOC and links created.