

# 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/) [<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](#)]

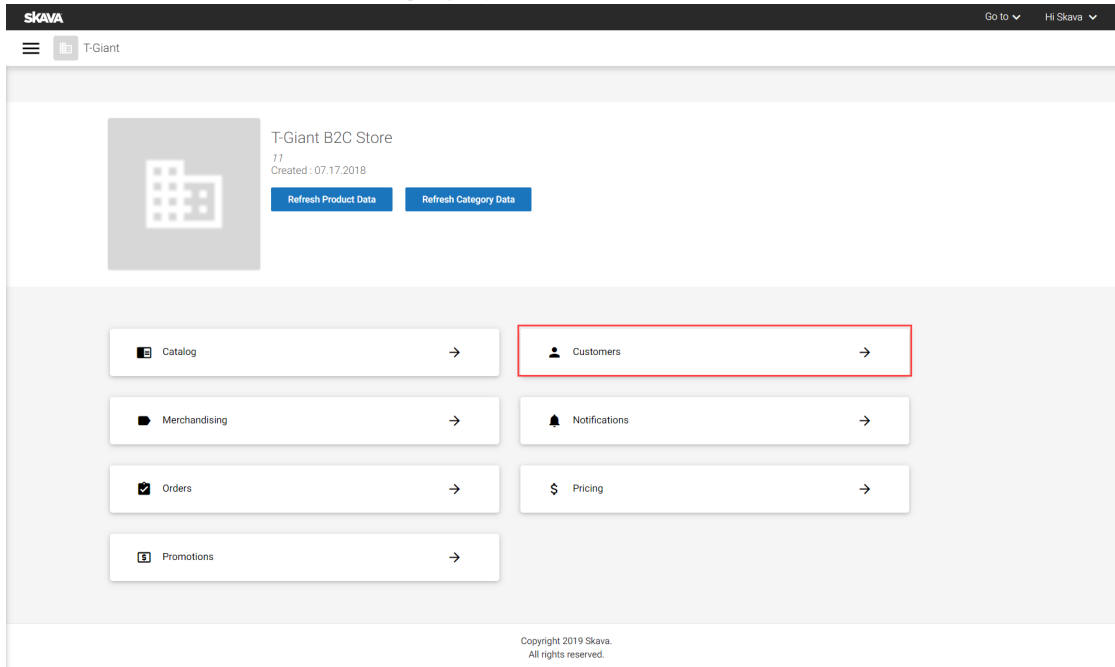
The Customer console can be accessed by an Admin user and/or CSR User.

- 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](#)].

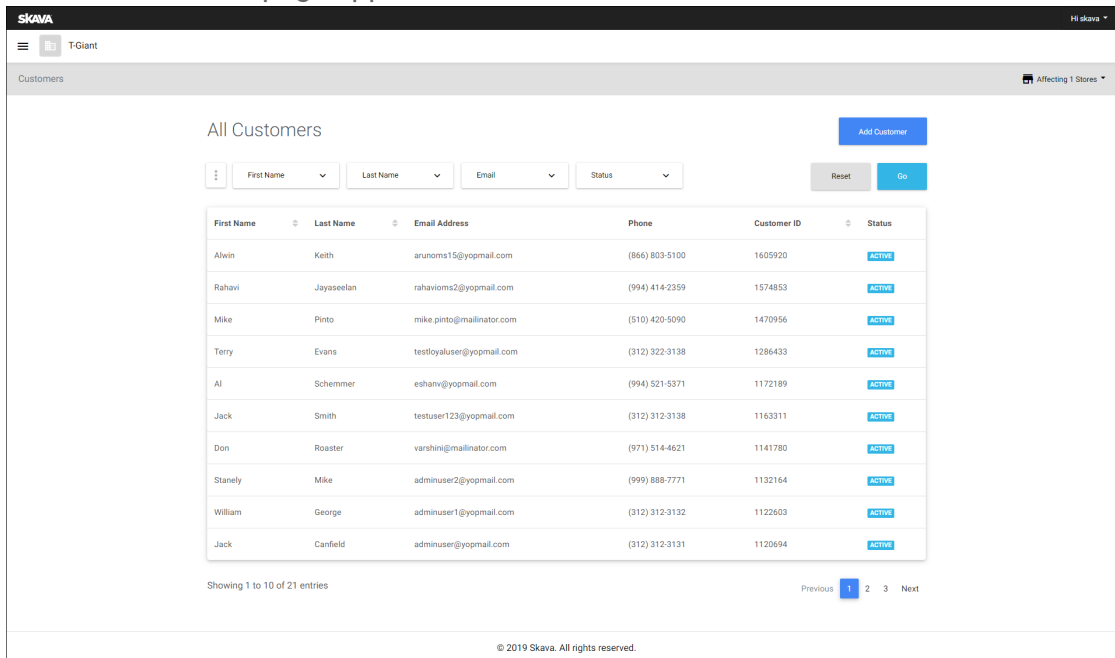
## Accessing the Customers Console by an Admin User

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).

**SKAVA**

LANGUAGE: ENGLISH ▼

Sign In

 Your Email

 Your Password

Sign in

[Forgot Password?](#)

Learn more about Skava Commerce and upcoming events at [Skava.com](#)


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

**SKAVA**

Hi Rahavi ▼

 T-Giant

All Stores (2)

Store Name	Store ID	Store Type	Store Status	Default Locale	
 T-Giant B2B	63	B2B	Active	en_US	>
 T-Giant B2C	9919	B2C	Active	en_US	>

10 Rows

< 1 >

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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.

SKAVA Hi John ▾

Businesses

Stores > Customer Service

Customer Order

Customer ID ▾ Email ID ▾ Phone Number ▾ First Name ▾ Last Name ▾

Account ID ▾

Reset Go

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.

SKAVA Hi John ▾

Businesses

Stores > Customer Service

Customer Order

Customer ID ▾ Email ID ▾ Phone Number ▾ First Name ▾ Last Name ▾

Account ID ▾

Reset Go

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 \[#CusSerPage\]](#) | [Configuring Search Parameters \[#SearchCustomer\]](#)

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.

The screenshot shows the 'All Customers' page in the Skava Admin User Guide. The page has a header with the Skava logo and a user profile 'T-Giant'. Below the header, there's a 'Customers' section with a filter 'Affecting 1 Stores'. The main content area is titled 'All Customers' and features a table of customer accounts. The table has columns for First Name, Last Name, Email Address, Phone, Customer ID, and Status. There are search filters for First Name, Last Name, Email, and Status. A table with 10 rows of customer data is shown. At the bottom, there's a pagination bar showing 'Showing 1 to 10 of 21 entries' and 'Previous 1 2 3 Next'.

First Name	Last Name	Email Address	Phone	Customer ID	Status
Alwin	Keith	arunoms15@yopmail.com	(866) 803-5100	1605920	ACTIVE
Rahavi	Jayaseelan	rahavioms2@yopmail.com	(994) 414-2359	1574853	ACTIVE
Mike	Pinto	mike.pinto@mailinator.com	(510) 420-5090	1470956	ACTIVE
Terry	Evans	testloyaluser@yopmail.com	(312) 322-3138	1286433	ACTIVE
Al	Schemmer	eshanv@yopmail.com	(994) 521-5371	1172189	ACTIVE
Jack	Smith	testuser123@yopmail.com	(312) 312-3138	1163311	ACTIVE
Don	Roaster	varshini@mailinator.com	(971) 514-4621	1141780	ACTIVE
Stanely	Mike	adminuser2@yopmail.com	(999) 888-7771	1132164	ACTIVE
William	George	adminuser1@yopmail.com	(312) 312-3132	1122603	ACTIVE
Jack	Canfield	adminuser@yopmail.com	(312) 312-3131	1120694	ACTIVE

## 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.

The screenshot shows the 'All Customers' page in the Skava Admin User Guide. The search criteria 'William' is entered in the 'First Name' field. The table displays 10 entries, with the first entry highlighted. The table has columns: First Name, Last Name, Email Address, Phone, Customer ID, and Status. The first entry is William George, with email adminuser1@yopmail.com, phone (312) 312-3132, and customer ID 1122603. The status is ACTIVE.

First Name	Last Name	Email Address	Phone	Customer ID	Status
Alvin	Keith	arunoms15@yopmail.com	(866) 803-5100	1605920	ACTIVE
Rahavi	Jayaseelan	rahavioms2@yopmail.com	(994) 414-2359	1574853	ACTIVE
Mike	Pinto	mike.pinto@mailinator.com	(510) 420-5090	1470956	ACTIVE
Terry	Evans	testloyaluser@yopmail.com	(312) 322-3138	1286433	ACTIVE
Al	Schemmer	eshanv@yopmail.com	(994) 521-5371	1172189	ACTIVE
Jack	Smith	testuser123@yopmail.com	(312) 312-3138	1163311	ACTIVE
Don	Roaster	varshini@mailinator.com	(971) 514-4621	1141780	ACTIVE
Stanely	Mike	adminuser2@yopmail.com	(999) 888-7771	1132164	ACTIVE
William	George	adminuser1@yopmail.com	(312) 312-3132	1122603	ACTIVE
Jack	Canfield	adminuser@yopmail.com	(312) 312-3131	1120694	ACTIVE


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

The screenshot shows the 'All Customers' page in the Skava Admin User Guide. The search criteria 'William' is entered in the 'First Name' field. The table displays 1 entry, which is highlighted. The table has columns: First Name, Last Name, Email Address, Phone, Customer ID, and Status. The first entry is William George, with email adminuser1@yopmail.com, phone (312) 312-3132, and customer ID 1122603. The status is ACTIVE.

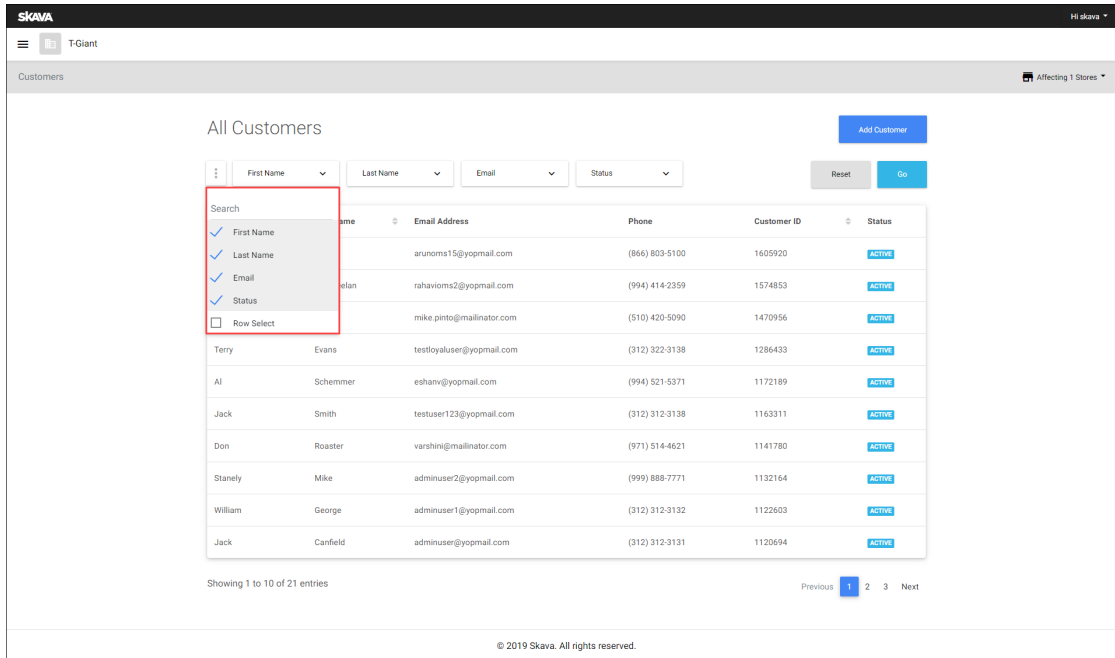
First Name	Last Name	Email Address	Phone	Customer ID	Status
William	George	adminuser1@yopmail.com	(312) 312-3132	1122603	ACTIVE

## 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.




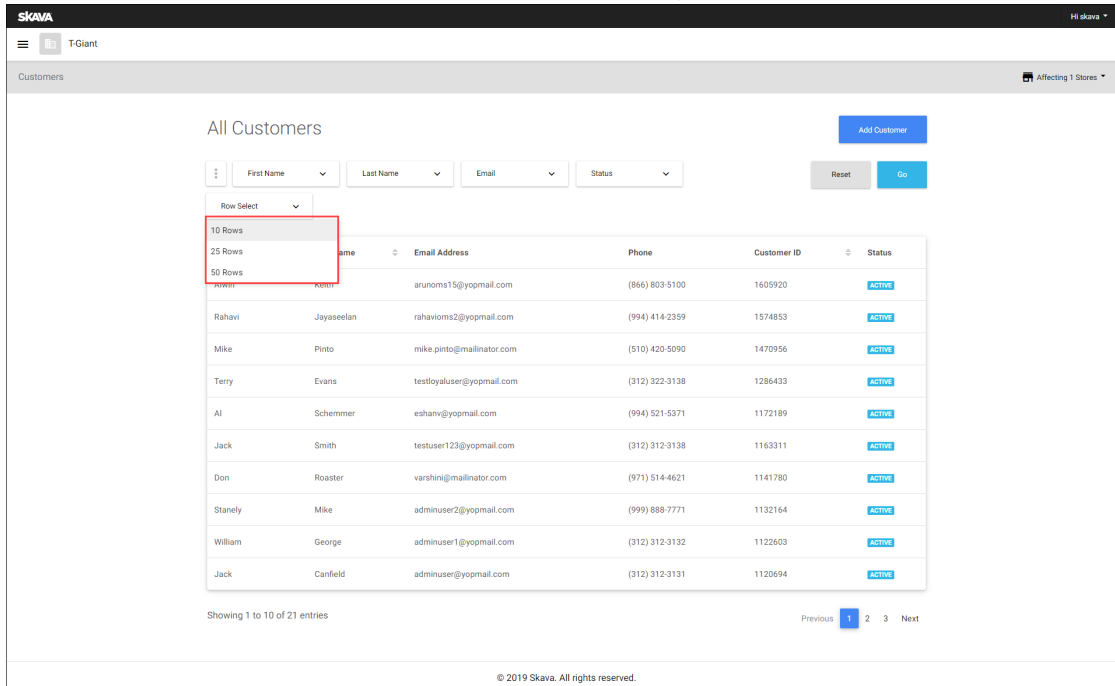
The screenshot shows the 'All Customers' page in the Skava Admin User Guide. A red box highlights the search criteria dropdown menu, which includes options for First Name, Last Name, Email, Status, and Row Select. The table below shows customer data with columns for Name, Email Address, Phone, Customer ID, and Status.

Name	Email Address	Phone	Customer ID	Status
arunoms15@yopmail.com	(866) 803-5100	1605920	ACTIVE	
rahavioms2@yopmail.com	(994) 414-2359	1574853	ACTIVE	
mike.pinto@mailinator.com	(510) 420-5090	1470956	ACTIVE	
testloyaluser@yopmail.com	(312) 322-3138	1286433	ACTIVE	
eshanv@yopmail.com	(994) 521-5371	1172189	ACTIVE	
testuser123@yopmail.com	(312) 312-3138	1163311	ACTIVE	
varshini@mailinator.com	(971) 514-4621	1141780	ACTIVE	
adminuser2@yopmail.com	(999) 888-7771	1132164	ACTIVE	
adminuser1@yopmail.com	(312) 312-3132	1122603	ACTIVE	
adminuser@yopmail.com	(312) 312-3131	1120694	ACTIVE	

## [] 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.



The screenshot shows the 'All Customers' page in the Skava Admin User Guide. A red box highlights the 'Row Select' dropdown menu, which includes options for 10 Rows, 25 Rows, and 50 Rows. The table below shows customer data with columns for Name, Email Address, Phone, Customer ID, and Status.

Name	Email Address	Phone	Customer ID	Status
arunoms15@yopmail.com	(866) 803-5100	1605920	ACTIVE	
rahavioms2@yopmail.com	(994) 414-2359	1574853	ACTIVE	
mike.pinto@mailinator.com	(510) 420-5090	1470956	ACTIVE	
testloyaluser@yopmail.com	(312) 322-3138	1286433	ACTIVE	
eshanv@yopmail.com	(994) 521-5371	1172189	ACTIVE	
testuser123@yopmail.com	(312) 312-3138	1163311	ACTIVE	
varshini@mailinator.com	(971) 514-4621	1141780	ACTIVE	
adminuser2@yopmail.com	(999) 888-7771	1132164	ACTIVE	
adminuser1@yopmail.com	(312) 312-3132	1122603	ACTIVE	
adminuser@yopmail.com	(312) 312-3131	1120694	ACTIVE	



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.

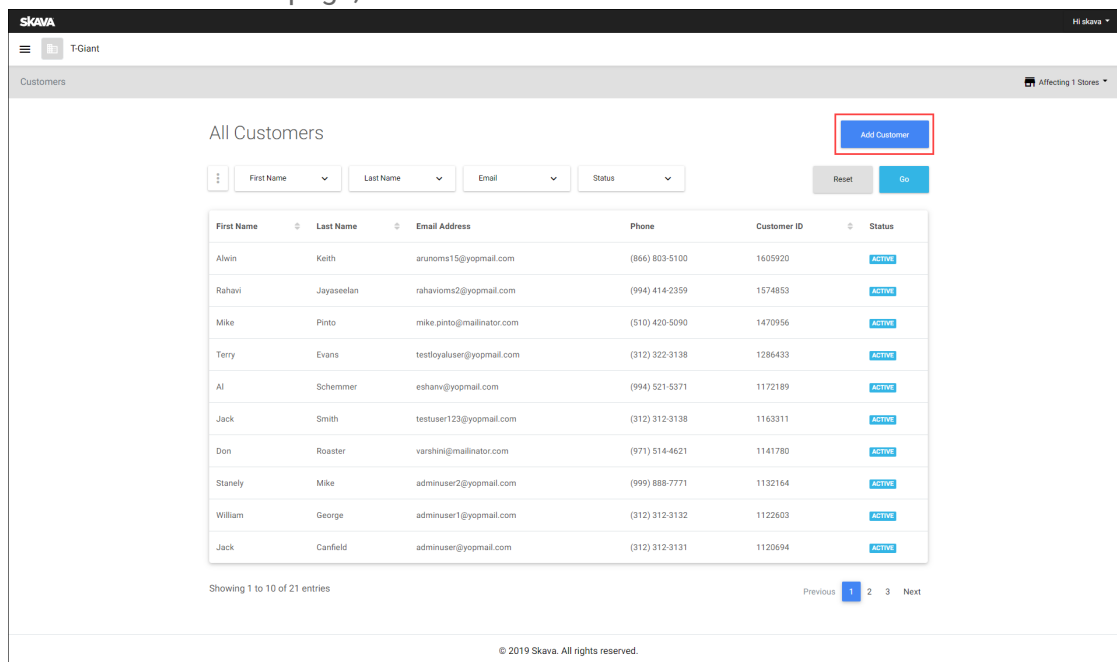
## □ Creating a Customer Account

[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,

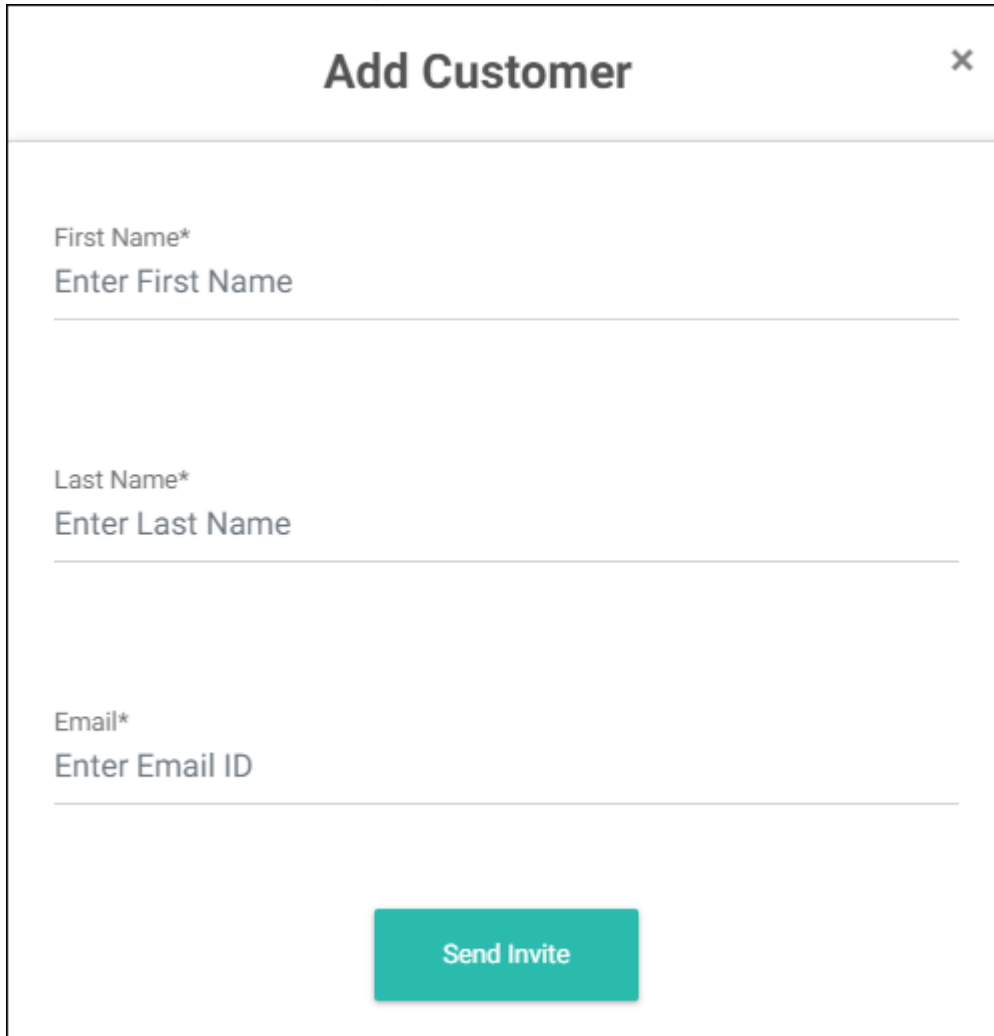
1. In the **All Customers** page, click the **Add Customers** button.



The screenshot displays the 'All Customers' page in the Skava Admin User Guide. The page header shows 'SKAVA' and 'Hi skava'. The main content area is titled 'All Customers' and features a search bar with filters for 'First Name', 'Last Name', 'Email', and 'Status'. Below the search bar is a table of customer accounts. A red box highlights the 'Add Customer' button in the top right corner. The table lists 10 customers, all with 'ACTIVE' status. The page also includes a 'Reset' button and a 'Go' button. The footer shows '© 2019 Skava. All rights reserved.'

First Name	Last Name	Email Address	Phone	Customer ID	Status
Alvin	Keith	arunoms15@yopmail.com	(866) 803-5100	1605920	ACTIVE
Rahavi	Jayaseelan	rahavioms2@yopmail.com	(994) 414-2359	1574853	ACTIVE
Mike	Pinto	mike.pinto@mailinator.com	(510) 420-5090	1470956	ACTIVE
Terry	Evans	testloyaluser@yopmail.com	(312) 322-3138	1286433	ACTIVE
Al	Schemmer	eshanv@yopmail.com	(994) 521-5371	1172189	ACTIVE
Jack	Smith	testuser123@yopmail.com	(312) 312-3138	1163311	ACTIVE
Don	Roaster	varshini@mailinator.com	(971) 514-4621	1141780	ACTIVE
Stanely	Mike	adminuser2@yopmail.com	(999) 888-7771	1132164	ACTIVE
William	George	adminuser1@yopmail.com	(312) 312-3132	1122603	ACTIVE
Jack	Canfield	adminuser@yopmail.com	(312) 312-3131	1120694	ACTIVE

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.

Customers

Affecting 2 Stores

All Customers

Add Customer

First Name Last Name Email Status

Reset Go

First Name	Last Name	Email Address	Phone	Customer ID	Status
Gregg	Owens	gregg.owens@gmail.com	(994) 521-5372	3862765	ACTIVE
John	Smith	omsordertestjan022020_1@yopmail.com	(977) 456-6888	3727884	ACTIVE
Rachel	Ray	rahavioms4@yopmail.com	(908) 070-6050	3401703	ACTIVE
Johnson	Smithy	suresh@skava.com	(986) 877-8889	3400947	ACTIVE
Jocylene	Juliet	anushya@yopmail.com	(098) 765-4321	3251952	ACTIVE
anushya	anushya	anushya.m@skava.com	-	3248681	ACTIVE
Ravi	Kumar	ravi@yopmail.com	(987) 654-3212	3212803	ACTIVE
Octavia	Williams	tamil48@mailinator.com	(227) 023-2246	2773044	ACTIVE
Tanner	Avila	tamil82@mailinator.com	(256) 404-3023	2773043	ACTIVE
Jenny	Joyce	rahavioms3@yopmail.com	(994) 414-2351	2627929	ACTIVE

Showing 1 to 10 of 40 entries

Previous 1 2 3 4 Next

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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]

Customers / Gregg Owens

Affecting 2 Stores

Back

Overview

Addresses

Orders

Cart

Payment

Loyalty

Subscriptions

Notes

Gregg Owens

gregg.owens@gmail.com

(994) 521-5372

ACTIVE

Reset Password

Appease

Act on Behalf


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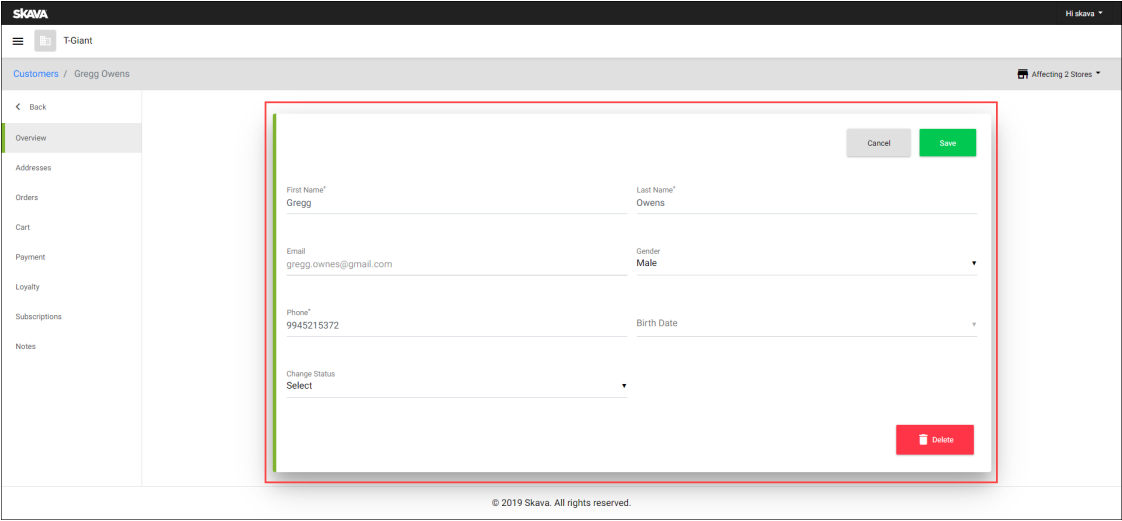
## Overview Tab

- 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:



The screenshot shows the Skava Admin User Guide interface. On the left is a sidebar with navigation links: Overview, Addresses, Orders, Cart, Payment, Loyalty, Subscriptions, and Notes. The main content area displays the 'Edit Profile' form for a customer named Gregg Owens. The form has a red border and contains the following fields: First Name\* (Gregg), Last Name\* (Owens), Email (gregg.owens@gmail.com), Gender (Male), Phone\* (9945215372), Birth Date, and Change Status (Select). There are 'Cancel' and 'Save' buttons at the top right, and a 'Delete' button at the bottom right. The footer of the page reads '© 2019 Skava. All rights reserved.'

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. <b>Note:</b> 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 <a href="https://developer.skava.com/microservices/customers/customers-collection-properties/">collection property</a> <a href="https://developer.skava.com/microservices/customers/customers-collection-properties/">[https://developer.skava.com/microservices/customers/customers-collection-properties/]</a> has been set to true.
Gender	Update the gender from the drop-down list.
Phone*	Update the contact number. <b>Note:</b> 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 <a href="https://developer.skava.com/microservices/customers/customers-collection-properties/">collection</a>

	<a href="https://developer.skava.com/microservices/customers/customers-collection-properties/">property</a> <a href="https://developer.skava.com/microservices/customers/customers-collection-properties/">https://developer.skava.com/microservices/customers/customers-collection-properties/</a> has been set to <code>true</code> .
<b>Change Status</b>	<p>Update the status from the drop-down list. The possible statuses are:</p> <ul style="list-style-type: none"> <li>• <b>Activate</b> – Indicates the active status of a customer account. This status appears when the customer account is inactive or frozen.</li> <li>• <b>Inactive</b> – Indicates the inactive status of a customer account.</li> <li>• <b>Freeze</b> – Indicates the frozen status of a customer account. While a Customer's account is in <b>freeze</b> status, NO action should be taken on the account, including sending any communication to the customer.</li> </ul> <p><b>Note:</b> To unfreeze the account, the customer must call the business' customer service team to activate the account.</p>

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

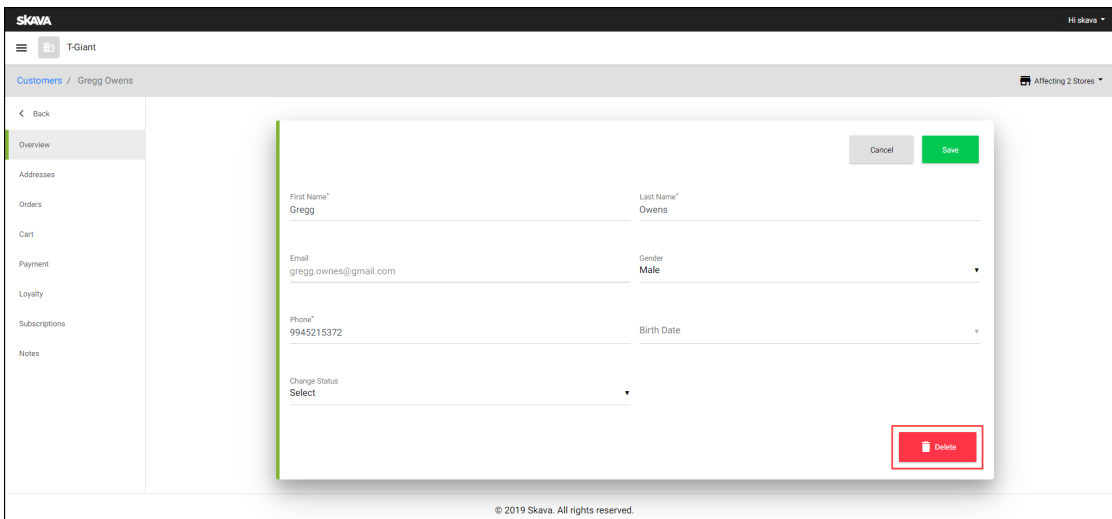
3. Click the **Save** button.

**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.



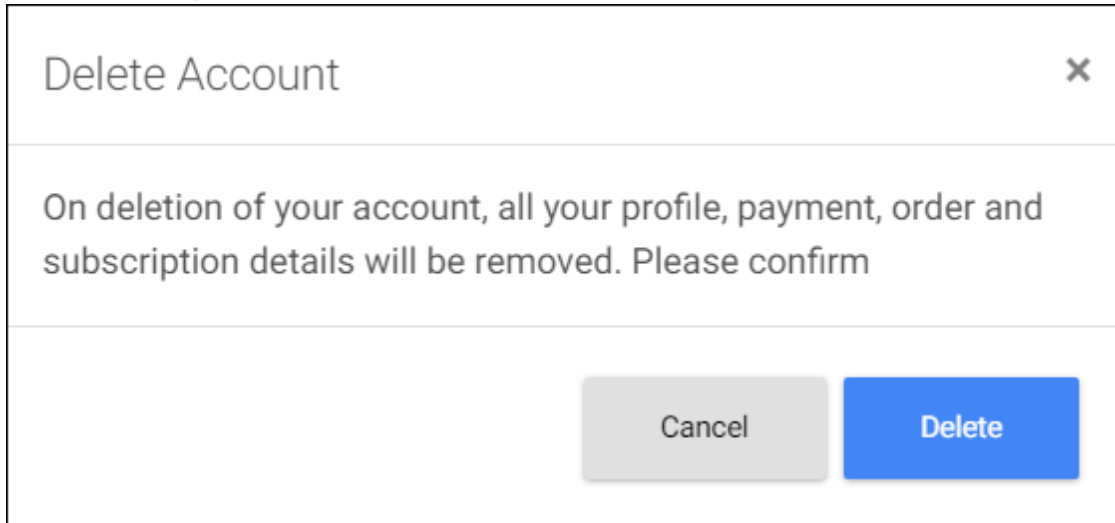
The screenshot shows the Skava Admin User Guide interface. On the left, there is a sidebar with a menu containing 'Overview', 'Addresses', 'Orders', 'Cart', 'Payment', 'Loyalty', 'Subscriptions', and 'Notes'. The 'Overview' tab is selected. The main content area displays a modal for deleting a customer account. The modal contains the following fields:

- First Name\*: Gregg
- Last Name\*: Owens
- Email: gregg.owens@gmail.com
- Gender: Male
- Phone\*: 9945215372
- Birth Date: (dropdown menu)
- Change Status: Select

At the bottom right of the modal, there is a red button labeled 'Delete' with a trash icon. Above the modal, there are 'Cancel' and 'Save' buttons. The footer of the page reads '© 2019 Skava. All rights reserved.'

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

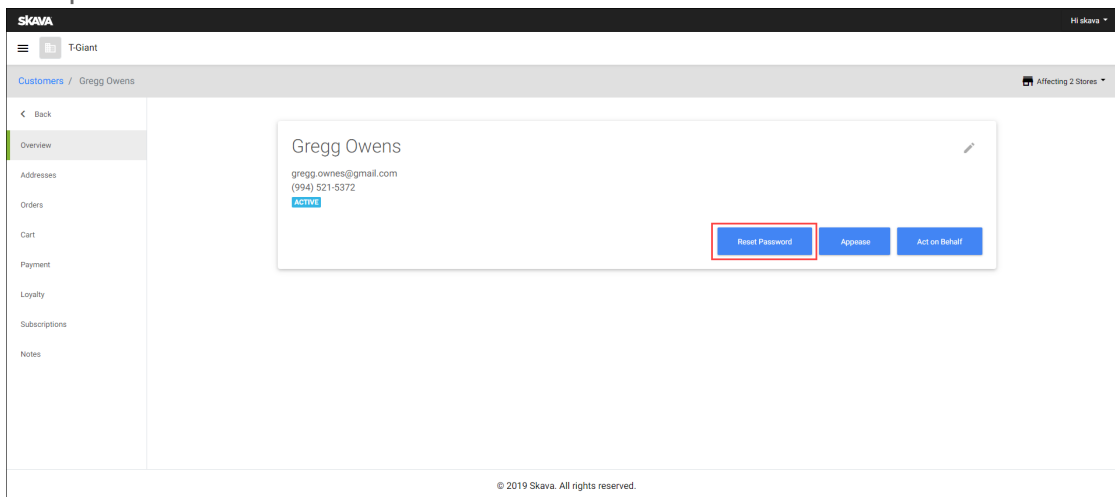
In the **Overview** tab, you can reset a customer's account password on behalf of a customer.

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.



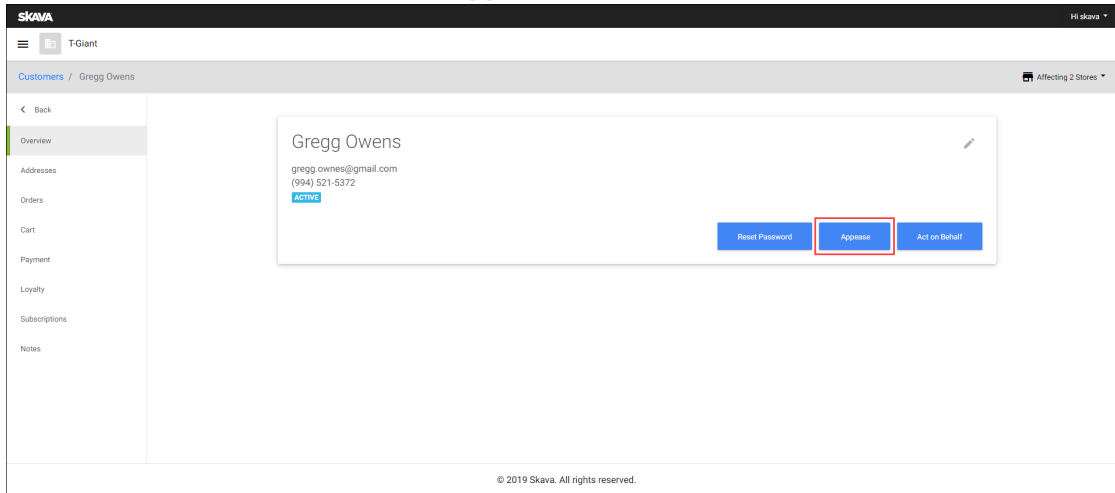
2. Add notes in the **Notes** tab to track the actions that are performed by an admin or CSR on behalf of a customer. For adding notes, see the **Notes** [#Notes]\_tab.

## □ 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.

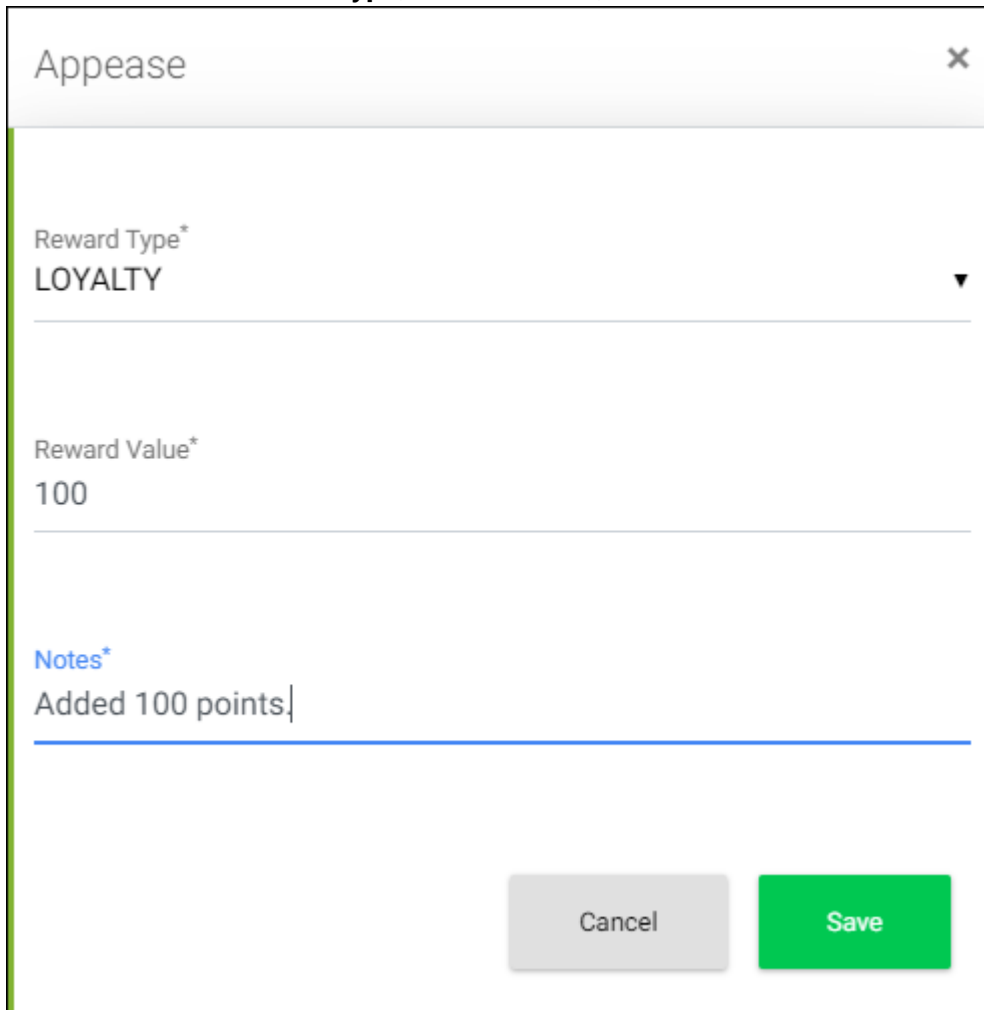
To provide appeasement,

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.

The screenshot displays the Skava Admin User Guide interface. On the left, a sidebar menu lists various sections: Overview, Addresses, Orders, Cart, Payment, Loyalty (highlighted), Subscriptions, and Notes. The main content area is titled 'Gregg Owens' and shows the 'Loyalty' section. It includes a 'Block Redemption' status, 'Rewards Open to Redeem' count, and 'Cycle Date'. Below this, there are two summary tables: 'Cycle Summary' and 'Total Summary', both showing counts for Earned, Approved, Canceled, Forfeited, Expired, Redeemed, and Reverse Redeemed rewards. At the bottom, a 'Transactions' table lists individual transactions with columns for Transaction Date, Type, Rewards Value, Open to Redeem, Expiration Date, Username, and Description. The first two transactions are highlighted with a red border.

Transaction Date	Type	Rewards Value	Open to Redeem	Expiration Date	Username	Description
06 Jan 2020	APPROVED	100	100	05 Jul 2020 18:30:00	1	
06 Jan 2020	EARNED	100	0	05 Jul 2020 18:30:00	1	Added 100 points

## Managing a Customer's Order

To manage a customer's order,

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

The screenshot displays the Skava Admin User Guide interface. On the left, a sidebar menu lists various sections: Overview (highlighted), Addresses, Orders, Cart, Payment, Loyalty, Subscriptions, and Notes. The main content area is titled 'Gregg Owens' and shows the 'Overview' section. It includes a 'Block Redemption' status, 'Rewards Open to Redeem' count, and 'Cycle Date'. Below this, there are two summary tables: 'Cycle Summary' and 'Total Summary', both showing counts for Earned, Approved, Canceled, Forfeited, Expired, Redeemed, and Reverse Redeemed rewards. At the bottom, a 'Transactions' table lists individual transactions with columns for Transaction Date, Type, Rewards Value, Open to Redeem, Expiration Date, Username, and Description. The first two transactions are highlighted with a red border.

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.

100% Satisfaction Guaranteed  
Your order is FINAL after clicking "Submit Order".  
By submitting your order, you agree and consent to T-Giant [Terms of Use](#) and [Privacy Policy](#)

Subtotal: (1 items): \$22.00  
Estimated Shipping: \$8.00  
Discounts: \$0.00  
Tax: \$1.80  
**Grand Total: \$31.80**

Effective Date

February 2020

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

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- 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.

**SKAVA** Hi skava

Customers / Gregg Owens Affecting 2 Stores

Back Overview Addresses Orders Cart Payment Loyalty Subscriptions Notes

**Gregg Owens**  
eshanyav@yopmail.com  
(994) 521-5372  
**ACTIVE**

Reset Password Approve Act on Behalf

**Addresses**

Gregg Owens  
555, Mission St, Tower 2  
San Francisco, CA 94105  
US  
(971) 514-4621

+ Add New Address

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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.

The screenshot shows the Skava Admin User Guide interface. The top navigation bar includes the Skava logo and a user profile icon. The left sidebar contains a menu with options: Back, Overview, Addresses (selected), Orders, Cart, Payment, Loyalty, Subscriptions, and Notes. The main content area displays the customer profile for 'Gregg Owens' with contact information and an 'ACTIVE' status. Below this, the 'Addresses' section is visible, showing a modal form for adding a new address. The form includes fields for First Name, Last Name, Address 1, Address 2, City, State, ZIP Code, Country, and Phone. The 'Make Default' toggle is currently off. The 'Save' button is highlighted in green, and the 'Cancel' button is in grey. A '+ Add New Address' button is also present.

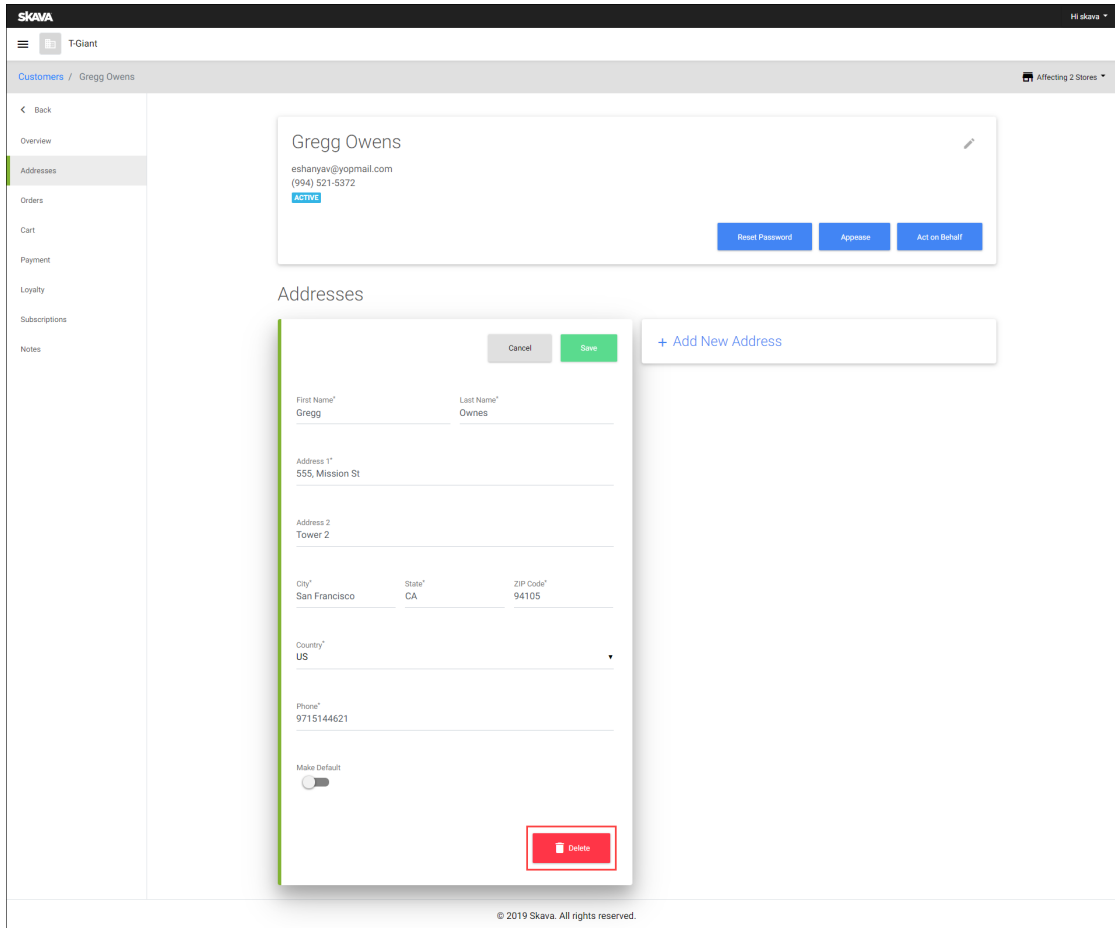
5. Click the **Save** button. The updated address details appear under the **Addresses** tab.
- Note:** To discard the changes, click the **Cancel** button.

## □ Deleting an Address

To delete an existing address,

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

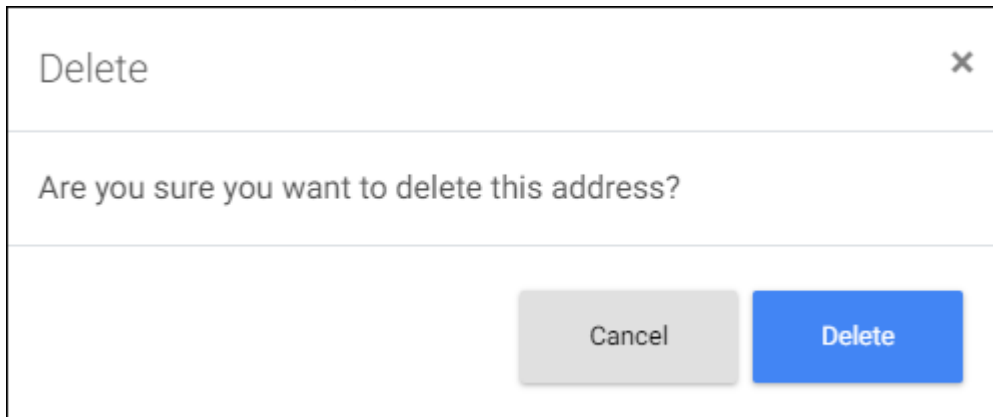
### 3. Click the **Delete** button in the address edit screen.



The screenshot shows the Skava Admin User Guide interface. On the left is a sidebar with navigation links: Back, Overview, Addresses (selected), Orders, Cart, Payment, Loyalty, Subscriptions, and Notes. The main content area shows the user profile for Gregg Owens, including email (eshanyav@yopmail.com) and phone (994) 521-5372. Below the profile is a modal form titled 'Addresses' for editing an address. The form has 'Cancel' and 'Save' buttons at the top. It contains fields for First Name (Gregg), Last Name (Owens), Address 1 (555, Mission St), Address 2 (Tower 2), City (San Francisco), State (CA), ZIP Code (94105), Country (US), and Phone (9715144621). A 'Make Default' toggle is at the bottom left. A red 'Delete' button is highlighted at the bottom right of the modal. The background shows a '+ Add New Address' button and a list of addresses.

### 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.



The screenshot shows a 'Delete' modal. The modal has a title 'Delete' and a close button (X) in the top right corner. The main text asks 'Are you sure you want to delete this address?'. At the bottom are two buttons: 'Cancel' and 'Delete'.

## □ 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.

The screenshot shows the Skava Admin User Guide interface. On the left is a sidebar with navigation links: Back, Overview, Addresses (highlighted), Orders, Cart, Payment, Loyalty, Subscriptions, and Notes. The main content area displays the profile of 'Gregg Owens' with email 'eshanyav@yahoo.com' and phone '(994) 521-5372'. Below this is the 'Addresses' section, which contains a list of addresses and a modal form for editing or adding an address. The modal form is highlighted with a red border and contains the following fields: First Name (Gregg), Last Name (Owens), Address 1 (555, Mission St), Address 2 (Tower 2), City (San Francisco), State (CA), ZIP Code (94105), Country (US), and Phone (9715144621). At the top right of the modal are 'Cancel' and 'Save' buttons. The footer of the page reads '© 2019 Skava. All rights reserved.'

### 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](#)]

Gregg Owens

gregg.owens@gmail.com  
(994) 521-5372

ACTIVE

Reset Password Appense Act on Behalf

### Orders

Order ID ▼ Date Range: 06 Jul 2019 to 06 Jan 2... ▼ Reset Go

Order ID	Order Date	Order Value
16f79768fddwz6	06 Jan 2020	USD 200.08
16f79604a22q854	06 Jan 2020	USD 308.21
16f775c5694i0lm	05 Jan 2020	USD 0.00
16f775a446144eo	05 Jan 2020	USD 24.08
16f77514611y38e	05 Jan 2020	USD 15.11
16f774c10d92mho	05 Jan 2020	USD 8.32
16f773974f9j5x	05 Jan 2020	USD 8.31
16f772c8302daep	05 Jan 2020	USD 308.21
16f771ec065y1ou	05 Jan 2020	USD 15.11
16f771d5318ody	05 Jan 2020	USD 8.31

Showing 1 to 10 of 52 entries

Previous 1 2 3 4 5 6 Next

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## □ 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 \[https://developer.skava.com/microservices/order/order-admin-user-guide/#OrderOverview\]](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.

The screenshot displays the Skava Admin User Guide interface. On the left, a sidebar contains navigation links: Overview, Addresses, Orders, **Cart** (highlighted with a red box), Payment, Loyalty, Subscriptions, and Notes. The main content area shows the profile of a customer named Gregg Owens, with contact information and a status of 'ACTIVE'. Below the profile, the 'Cart' section is highlighted with a red box, showing a table with one item:

Product	Quantity	Item Price	Total
 Men's Basic Crew Heavyweight Long Sleeve Standard Fit T-shirt Neckline: Crew Neck Color: Grey Gender: Men Fit: Standard fit Size: Small Length: At hip Fabric: 100.0% Cotton Item #: 50898	5	USD 10.48 <del>USD 13.46</del>	USD 52.40

At the bottom of the cart section, it says 'Showing 1 to 1 of 1 entries' and includes 'Previous' and 'Next' navigation links. The footer of the page states '© 2019 Skava. All rights reserved.'

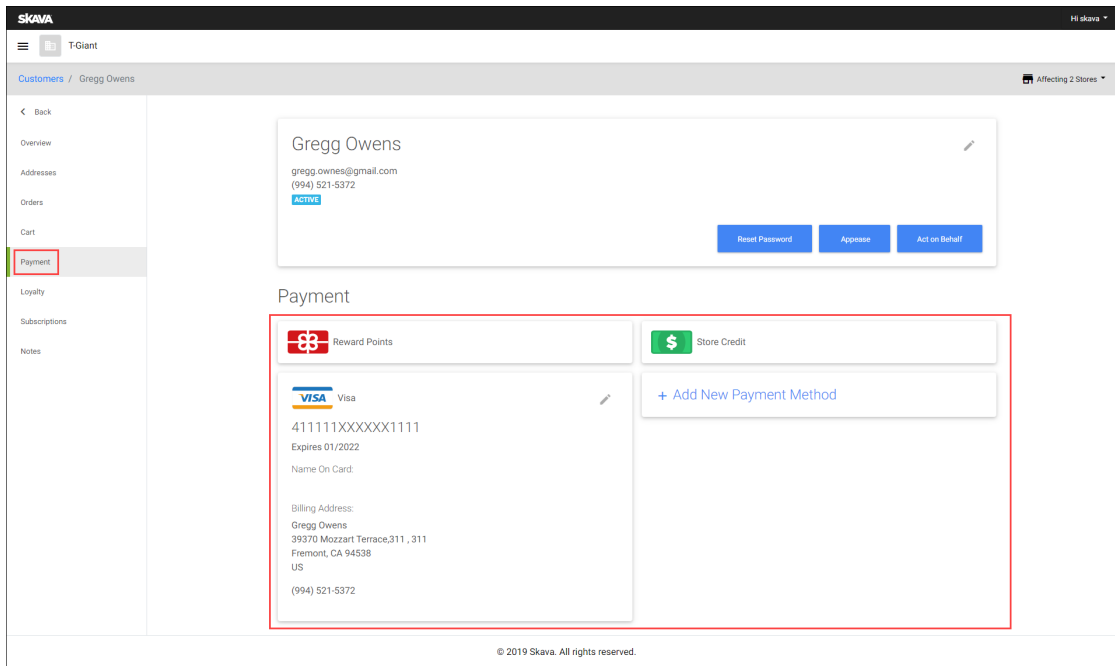
## Payment Tab

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.



SKAVA

Hi skava

Customers / Gregg Owens

Affecting 2 Stores

Back

Overview

Addresses

Orders

Cart

Payment

Loyalty

Subscriptions

Notes

Gregg Owens

gregg.owens@gmail.com

(994) 521-5372

Reset Password

Approve

Act on Behalf

Payment

Reward Points

Store Credit

Visa

411111XXXXX1111

Expires 01/2022

Name On Card:

Billing Address:

Gregg Owens

39370 Mozart Terrace, 311, 311

Fremont, CA 94538

US

(994) 521-5372

+ Add New Payment Method

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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.

The screenshot shows the Skava Admin User Guide interface. The top navigation bar includes the Skava logo and a user profile for 'T-Giant'. The left sidebar lists various customer management options: Back, Overview, Addresses, Orders, Cart, Payment (selected), Loyalty, Subscriptions, and Notes. The main content area displays the 'Payment' tab for a customer named Gregg Owens. The customer's profile card shows their email (gregg.owens@gmail.com), phone number ((994) 521-5372), and an 'ACTIVE' status. Below this, the 'Payment' section includes a 'Reward Points' card and a 'Store Credit' card. A modal form for adding a new payment method is open, featuring fields for card expiration (01/2022), cardholder name (Gregg Owens), billing address (39370 Mozart Terrace, 311, Fremont, CA 94538), and phone number (9945215372). The form also includes a 'Country' dropdown (US) and an 'Is Default' toggle. A red 'Remove Card' button is at the bottom right of the modal. The footer of the page reads '© 2019 Skava. All rights reserved.'

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.

The screenshot shows the Skava Admin User Guide interface. On the left is a sidebar with navigation links: Back, Overview, Addresses, Orders, Cart, Payment (selected), Loyalty, Subscriptions, and Notes. The main content area shows the profile of Gregg Owens, including contact information and buttons for 'Reset Password', 'Approve', and 'Act on Behalf'. Below this is the 'Payment' section, which includes 'Reward Points' and 'Store Credit' options. A modal form is open for editing payment details. At the bottom of this modal, a red box highlights the 'Remove Card' button. The footer of the page reads '© 2019 Skava. All rights reserved.'

## 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.

The screenshot shows a 'Delete' modal with a close button (X) in the top right corner. The modal contains the text 'Are you sure you want to delete this card?'. At the bottom, there are two buttons: 'Cancel' and 'Delete'. The 'Delete' button is highlighted with a red box.

## Creating a Payment Method

To create a payment method,

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

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

The screenshot shows the Skava Admin User Guide interface. At the top, there's a header with the Skava logo and user information. Below the header, there's a sidebar with navigation options: Overview, Addresses, Orders, Cart, Payment (selected), Loyalty, Subscriptions, and Notes. The main content area shows the 'Payment' tab for a customer named Gregg Owens. The customer's details are displayed at the top, including their email and phone number. Below this, there are two tabs: 'Reward Points' and 'Store Credit'. The 'Store Credit' tab is active, showing a form for adding a new payment method. The form includes fields for Card Number, Expiry Month, Expiry Year, CVV, Name On Card, Billing Address, Address 1, Address 2, City, State, ZIP Code, Country, and Phone Number. The form is highlighted with a red border.

- If the address exists, select the existing address or enter an address manually.
- 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 \[#SearchTransaction\]](#)

**Gregg Owens**  
gregg.owens@gmail.com  
(994) 521-5372  
**ACTIVE**

[Reset Password](#) [Appeal](#) [Act on Behalf](#)

**Loyalty**

Block Redemption : false  
Rewards Open to Redeem : 100  
Cycle Date : 04 Jan 2020 00:00:00  
**ACTIVE**

Reward Type  
LOYALTY

**Cycle Summary**

Earned Rewards	:	0
Approved Rewards	:	100
Canceled Rewards	:	0
Forfeited Rewards	:	0
Expired Rewards	:	0
Redeemed Rewards	:	0
Reverse Redeemed Rewards	:	0

**Total Summary**

Earned Rewards	:	0
Approved Rewards	:	100
Canceled Rewards	:	0
Forfeited Rewards	:	0
Expired Rewards	:	0
Redeemed Rewards	:	0
Reverse Redeemed Rewards	:	0

**Transactions**

Type Transaction Date

[Reset](#) [Go](#)

Transaction Date	Type	Rewards Value	Open to Redeem	Expiration Date	UserName	Description
06 Jan 2020	APPROVED	100	100	05 Jul 2020 18:30:00	1	
06 Jan 2020	EARNED	100	0	05 Jul 2020 18:30:00	1	Added 100 points

Showing 1 to 2 of 2 entries

[Previous](#) [1](#) [Next](#)

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## □ 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:

The screenshot displays the Skava Admin interface for a customer named Gregg Owens. The sidebar on the left contains navigation links: Back, Overview, Addresses, Orders, Cart, Payment, **Loyalty** (highlighted with a red box), Subscriptions, and Notes. The main content area shows the customer's profile with fields for email, phone, and status (ACTIVE). Below this is the Loyalty section, which includes a summary of rewards and a table of transactions. The Loyalty summary is divided into two parts: Cycle Summary and Total Summary. The Cycle Summary shows earned, approved, canceled, forfeited, expired, redeemed, and reverse redeemed rewards. The Total Summary shows the same metrics for the total. The Transactions table lists individual transactions with columns for Transaction Date, Type, Rewards Value, Open to Redeem, Expiration Date, Username, and Description. The table shows two transactions: one approved on 05 Jan 2020 and one earned on 05 Jan 2020.

Field	Description
<b>Block Redemption</b>	The ability of a customer to redeem rewards. The possible values are: <ul style="list-style-type: none"> <li><code>true</code> – block the redemption</li> <li><code>false</code> – unblock the redemption</li> </ul>
<b>Rewards Open to Redeem</b>	Specifies the total rewards that are available for the redemption.
<b>Cycle Date</b>	Specifies the next cycle date. <b>Note:</b> The cycle period is set in the collection properties.
<b>Active</b>	Specifies the reward status.
<b>Reward Type</b>	Specifies the type of rewards. For example, points, stars, etc.
<b>Cycle Summary</b>	Specifies the summary of rewards that are applicable for the current cycle.
<b>Earned Rewards</b>	Specifies the rewards earned in this cycle.

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

**Gregg Owens**  
gregg.owens@gmail.com  
(994) 521-5372  
**ACTIVE**

**Loyalty**  
Block Redemption : false  
Rewards Open to Redeem : 100  
Cycle Date : 04 Jan 2020 00:00:00  
**ACTIVE**

**Cycle Summary**

Earned Rewards	:	0
Approved Rewards	:	100
Cancelled Rewards	:	0
Forfeited Rewards	:	0
Expired Rewards	:	0
Redeemed Rewards	:	0
Reverse Redeemed Rewards	:	0

**Total Summary**

Earned Rewards	:	0
Approved Rewards	:	100
Cancelled Rewards	:	0
Forfeited Rewards	:	0
Expired Rewards	:	0
Redeemed Rewards	:	0
Reverse Redeemed Rewards	:	0

**Transactions**

Type Transaction Date Reset Go

Transaction Date	Type	Rewards Value	Open to Redeem	Expiration Date	UserName	Description
06 Jan 2020	APPROVED	100	100	05 Jul 2020 18:30:00	1	
06 Jan 2020	EARNED	100	0	05 Jul 2020 18:30:00	1	Added 100 points


Showing 1 to 2 of 2 entries

Previous 1 Next

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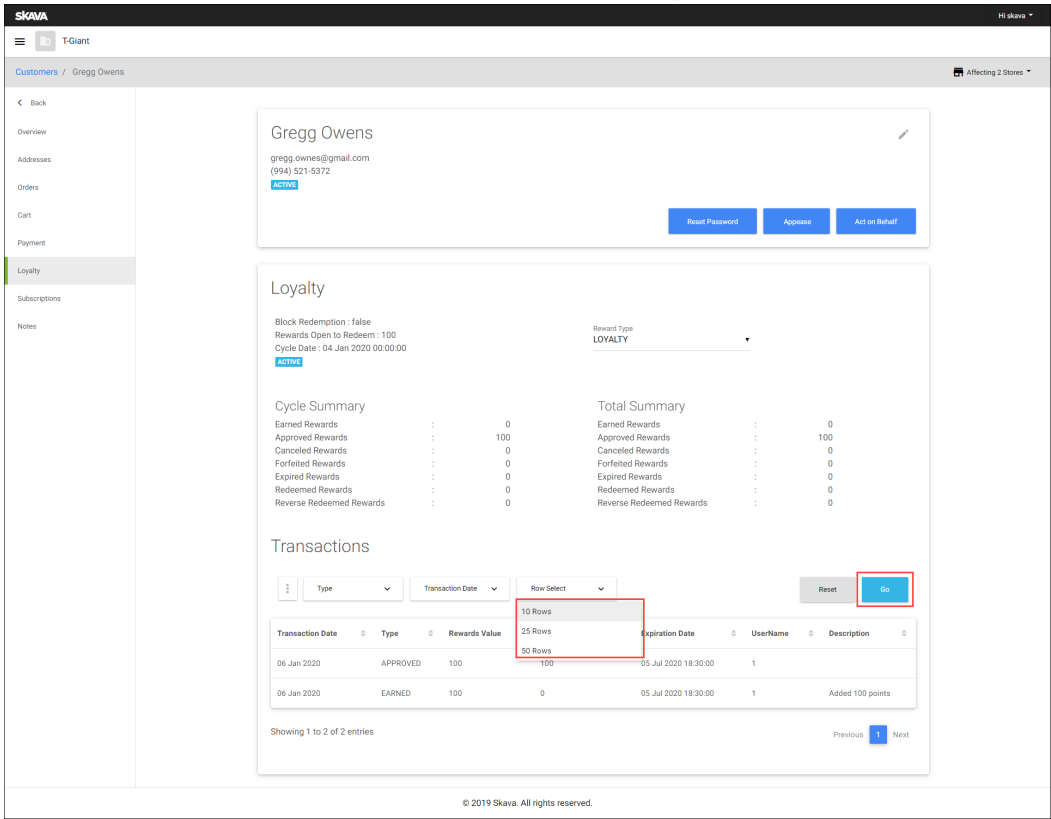
The list of transactions that matches the search criteria will appear.

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

- 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.

The screenshot shows the Skava Admin interface for a customer named Gregg Owens. The left sidebar contains a menu with options: Back, Overview, Addresses, Orders, Cart, Payment, Loyalty (selected), Subscriptions, and Notes. The main content area displays the customer's profile with contact information and an 'ACTIVE' status. Below the profile is the 'Loyalty' section, which includes a 'Block Redemption' status, 'Rewards Open to Redeem' count, and 'Cycle Date'. It also features two summary tables: 'Cycle Summary' and 'Total Summary', both showing zero values for various reward metrics. At the bottom, the 'Transactions' section displays a table with two entries, both dated 06 Jan 2020, one 'APPROVED' and one 'EARNED'. The 'Subscriptions' tab is highlighted in the sidebar.

## Subscriptions Tab

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

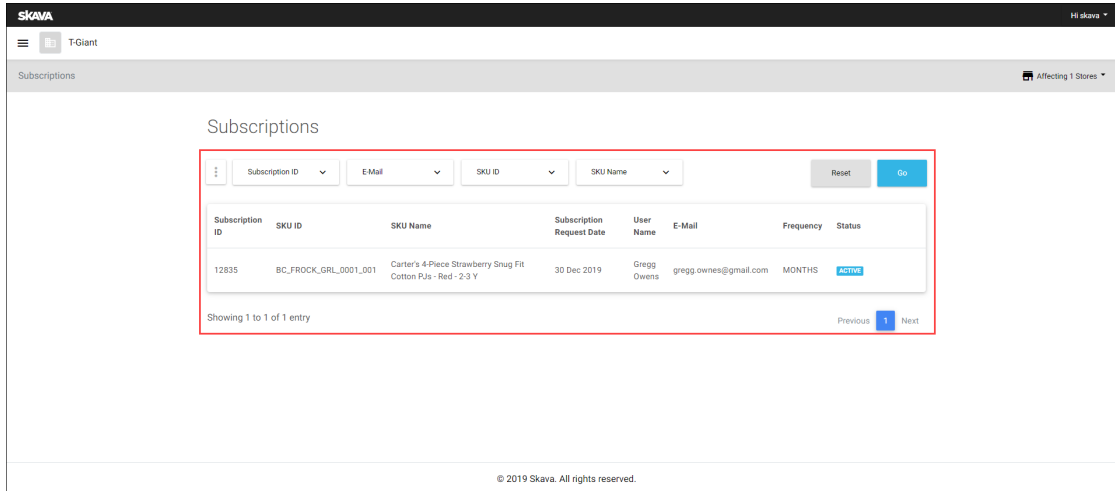
- view a list of subscription requests
- search for subscription requests
- manage subscription requests [[#ManageSubscription](#)]

The screenshot shows the Skava Admin interface for a customer named Gregg Owens, with the 'Subscriptions' tab selected in the sidebar. The main content area displays the customer's profile and the 'Subscriptions' section. The 'Subscriptions' section includes a search bar with filters for 'Subscription ID', 'SKU Name', and 'Status'. Below the search bar is a table with one entry, showing a subscription request for 'Carter's 4-Piece Strawberry Snug Fit Cotton PJs - Red - 2-3 Y' with a 'Subscription Request Date' of 30 Dec 2019 and a 'Frequency' of 'MONTHLY'. The 'Subscriptions' tab is highlighted in the sidebar.

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.

The screenshot shows the Skava Admin User Guide interface. On the left is a sidebar with navigation options: Back, Overview, Addresses, Orders, Cart, Payment, Loyalty, Subscriptions, and Notes. The main content area displays the customer profile for Gregg Owens, including their email (gregg.owens@gmail.com) and phone number ((994) 521-5372). Below the profile information are buttons for 'Reset Password', 'Approve', and 'Act on Behalf'. A 'Notes' section is visible, showing a text input field with the note: 'As per the request, the password reset link has been sent to your registered email ID.' and buttons for 'Cancel' and 'Save'.

## 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.