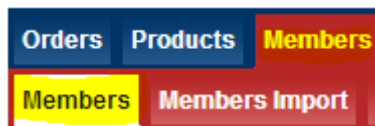


## Etail Systems Tip Sheet

*Objective: To add a member in COMS.*

The following tells you how to achieve this;-

Members are people who have an account with your website, so they have a login area, & some of their details are stored on our system (e.g. name, address, telephone number etc). They may also have signed up to your newsletter (people who have **only** signed up to your newsletter are subscribers.)



To add a member in COMS, you'll need to go to Members > Members.

**NB: If you have multiple sites, you'll need to click on the main "Members" tab, select your site, & then click on the secondary "Members" tab to access the members for that site.**

You'll then need the 'Add New Member'

**Add New Member**

button on the right.

If you have multiple sites, please select which site you want to add a member to.

Site: **Please select** ▼

You'll then have to fill in a form. All the boxes with red asterisks are required.

Email address:  \*

Title: **Please select** ▼

Firstname:  \*

Surname:  \*

Screen Name:

Mobile:

Company name:

Address Line 1:  \*

Address Line 2:

Address Line 3:

Town:  \*

County:

Post code:  \*

Country: **United Kingdom** ▼ \*

Telephone:

There are some fields (Screen Name & Company Name) that you can't edit yet.

If you're selling B2B, the customer may have a **VAT number**. This can be entered later on. If they're a business in the EU, you can tick the box so the VAT is taken off.

The '**Where did you see us?**' comes from your sources. If you'd

VAT number:

☐ Business in EU - Remove VAT from EU orders

Gender: **Male** ▼

Date of Birth:  \*

Where did you see us? **Please select...** ▼

Membership class: **Please select a Membership Role** ▼

## Adding a member (in COMS)

like to edit these, we can show you how to do this.

If you'd like to set up different **membership classes** (e.g. Silver Members might get 5% off, & Gold Members might get 20% off), we can send you a walkthrough on how to do this.

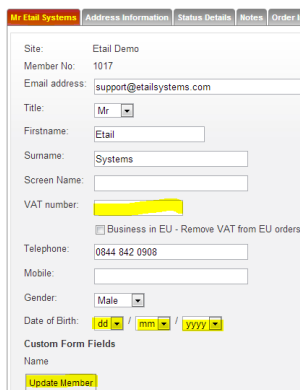
Anything else on this page isn't applicable to most clients, but please ask if you think you'd find it useful.

Once you've filled in all their information, you can click 'Add new Member' in the bottom left.

Add new Member

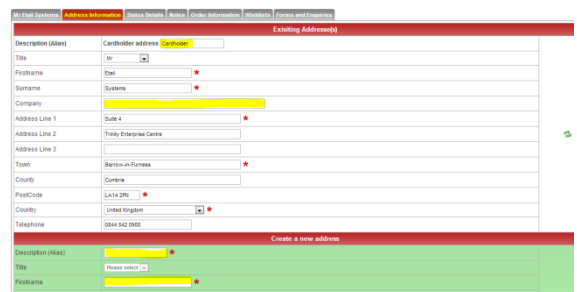
You will get a success message if you've added all the information needed, or you'll get a warning message telling you what is missing.

Once a member has been created, there are some mini tabs holding different information.

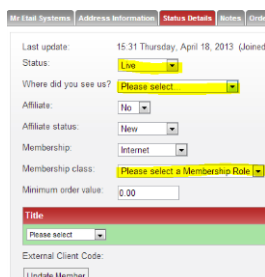


The first mini tab will be the customer's name, & you can now add a VAT number & a customer's date of birth. Click 'Update Member' once you've made your changes.

The second mini tab will be 'Address Information'. The address you've just input will automatically be called 'Cardholder'. You can add alternative addresses (e.g. Delivery) underneath. Again, some fields can't be filled in at this moment, but they will be able to once you've created the address. To add the new address, click the green 'add' button on the right.



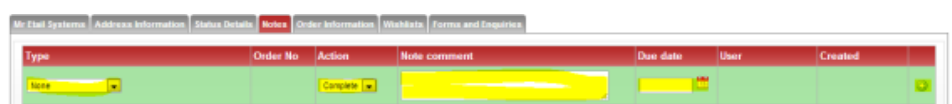
If you want to edit the Cardholder address, make your changes & then click the 'update' button on the right.



The next mini tab is 'Status Details'. Most of these fields won't be applicable, but you can update whether the member is Live, Suspended or Dead, 'Where did you see us?' & 'Membership Class' here.

Don't forget to click 'Update Member' when you've made your changes.

The next mini tab is 'Notes'.



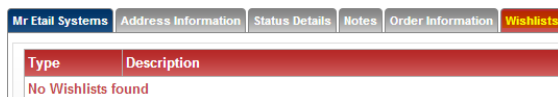
## Adding a member (in COMS)

Here, you have a variety of options; if it's completed or pending, from a customer or information from a supplier etc. You can also add a due date. Enter your note information & click the green 'add' button.

The next mini tab is 'Order Information', which gives you a link to each order from that customer, the total of each order, & the grand total of all their orders.



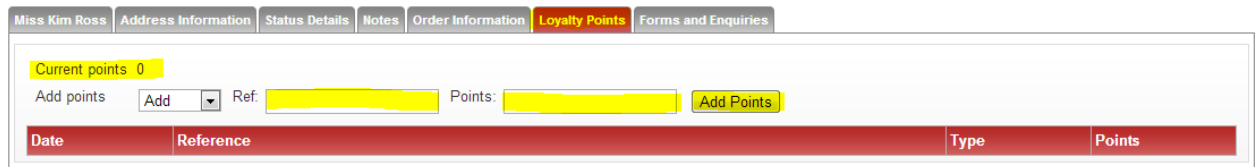
Order No.	Order date	Site	Source	Name	Deadline	Value
No Orders found						
Total Order value						£0.00



Type	Description
No Wishlists found	

The third to last mini tab is 'Wishlists'. If you have this functionality turned on, a customer's wishlists will appear here, & whether they're completed or not.

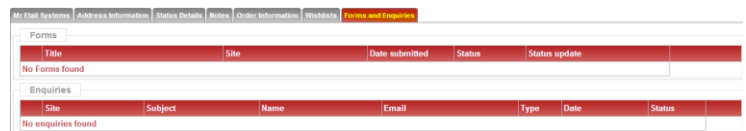
If you have loyalty points active on your site, you can add points to a person's member profile manually e.g. if you give points for people leaving reviews.



Date	Reference	Type	Points
------	-----------	------	--------

To add or remove points from a person, select the appropriate option from the dropdown. The 'Ref' is just for you e.g. an order number, & then add the amount of points in the 'Points' box, & click 'Add Points'. If you don't currently have loyalty points set up & you're instrested, please ask us about this.

The last mini tab is 'Forms & Enquiries'. Any forms or enquiries a customer has sent in will appear here, & if they're outstanding or complete.



Title	Site	Date submitted	Status	Status update
No Forms found				

Site	Subject	Name	Email	Type	Date	Status
No enquiries found						

[Send Password Reset Email](#) [Create Order](#)

At the bottom of all mini tab screens, you'll see 'Send Password Reset Email' & 'Create Order'.

The Password Reset email button will send the customer an email letting them reset their password. If you have MOTO set up, you can also create an order by clicking the 'Create Order' button.

### Downloading Members

There are 2 options when downloading members: Short CSV & Long CSV. They contain the following fields:

**Short CSV** - Title, First name, Surname, Email, Subscribe, Telephone, Mobile, Address company name, Address line 1, Address line 2, Address line 3, Address town, Address county, Address postcode, Address country, Address telephone number, Address mobile, Order count, Order value, Last order (date), Points

---

(if loyalty points enabled), Registration date, (membership) Role.

**Long CSV** – includes all of the above plus: Delivery name, Delivery company name, Delivery line 1, Delivery line 2, Delivery line 3, Delivery town, Delivery county, Delivery postcode, Delivery country, Delivery telephone number, Delivery mobile, Form fields, Source.

If you need help with adding a member in COMS, please call 0844 482 0908 or email [support@etailsystems.com](mailto:support@etailsystems.com).