Customer Client Projects

() Customer Client Projects must be switched on by Commerce Vision.	On this page:
Customer Client Projects lets your B2B customers place and track orders against specific client projects ('jobs'). NOTE - Access is Role-based. Admin users can add Customer Client Projects pages for specific Roles.	 How it works for your customers Client and Project Maintenance Maintain Customer Clients Create a
Use case: A Commerce Vision site sells office furniture and decor. Many of their customers buy products to fit out commercial premises. They use Customer Client Projects to manage and track orders for each fitout project. Each Project created includes the client's name, start/end dates, and a budget. When an order is submitted against a project, the budget is automatically re-calculated. Some projects need several orders placed at different stages. At any time, a customer can go to the Client Projects Maintenance page to check what has been purchased for a project. Handy especially when more than one staff member is involved. Project details can be edited if needed.	Client Maintain Customer Client Projects Create a Client Project Delete a Project Admin tasks
Image: Construction Const. Addem Budget Stands NorthWard Vinitian Vinitian	 Enable Customer Client Projects Add Customer Client Projects pages for a Role Related help

How it works for your customers

Every Project is linked to a Client. Your customer user can pre-add a Client and then a Project against the Client on your website on the Client and Client Project maintenance pages. Or before submitting an order at Checkout, in the Project panel, they have the option of adding it against an existing project or creating a new one.

F	Purchase	
	≔ Project	
	No Project Selected X v	• New Project
	- No Project Selected -	
	Office Furnishings (New Offices Pty Ltd)	

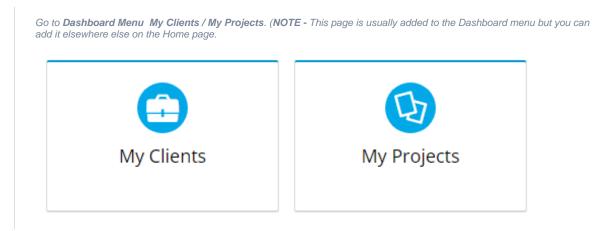
If the user chooses to create a New Project, they can add a new Client first if needed.

Project ×	Client ×
Name *	Name *
	Contact Name *
Client *	
• Create	Address 1
Address 1	Address2
Address2	Suburb
Suburb	Postcode
Postcode	Client Phone
Client Phone	Client Email
Client Email	Comments
Budget	
Start Date	// Status
End Date	Active v
Comments	Cancel
A Status	
Active v	
Gancel O Create	
• Create	

Once the Project is linked, the user just submits the order the usual way. The submitted order is now linked to the Project and can be accessed via the Client Projects page. **TIP** - It is also treated as a normal order so the usual order notification emails are triggered and it can be tracked in Order History.

Client and Project Maintenance

Clients and Projects are maintained in different pages. Both are usually accessed via the Dashboard menu.



Maintain Customer Clients

This page lets your customers view and maintain their clients.

♠ > Customer Client Maintenance

L Customer Client Maintenance

Maintain Customer Clients

Q Clients								
Client Status	Create Start Date		Create End Date					
All	▼	++ 						
		OR						
Client Name								
Q Search O New Client								
≅ Search Results	Search Results							
1 records (1 page)								
Client T	Address	Status	 ▼	Options				
New Offices Pty Ltd (Jane Smith)	30 Lisburn Street EAST BRISBANE 4169	Active		🖌 Edit 🛢 Delete				

Create a Client

A new client is created in the Customer Client Maintenance page. It can also be created when a Project is being created in the Maintenance page or during Checkout.

To create a new client:

۹ Clients					
Client Status		Create Start Date		Create End Date	
			OR		
Client Name					
Q Search O	New Client				

3. In the Client dialog window, enter details of the new client.

Client		×	
Name *			
Contact Name *			
Address 1			
Address2			
Suburb			
Postcode			
Client Phone Client Email			
Comments			
Status		11	
Active		v	
Cancel	• Cr	eate	
ame: Client/company nat ontact Name: Contact po ddress & contact fields: omments: notes relevan	erson's name. Client address and t to the client.		,,,,
t atus: Active or Inactive.	inactive clients can	not be selected and	iinked to a

Maintain Customer Client Projects

This page lets your customers view and maintain client projects. Every project is linked to a client.

♠ > Customer Client Project Maintenance

Customer Client Project Maintenance

Maintain Customer Project Clients

Q Projects							
Client Status	Create Start Date	Create End Date	Project Name				
All	v	(**)					
		OR					
Client Name							
	Q Search Image: New Project						
E Search Results 1 records (1 page)							
Project Name	Client 📥 Address 📥 Buc	lget 🔺 Status 📥 Total Valu	e Variance Options				
Office Furnishings	New Offices Pty Ltd (Jane 30 Lisburn Street EAST \$15, Smith) BRISBANE 4169	000.00 Active \$1,592.79	\$13,407.21 left				

89% left

Create a Client Project

A new project is created in the Customer Client Project Maintenance page. It can also be created on the Checkout page to link the current order to a project.

To create a new client project:

	Maintain Customer Project Clients	Maintain Customer Project Clients	A Project Clients Client Status Create Start Date All Client Name	2. Click New Project			
Q Projects Client Status Create Start Date Create End Date Project Name Client Name	Q. Projects Client Status Create Start Date All * OR Client Name	Q. Projects Client Status Create Start Date Project Name All * Image: Client Name Oilent Name Image: Client Name	Q. Projects Client Status Create Start Date Project Name All * Image: Client Name Client Name Image: Client Name	Customer	Client Project Maintena	nce	
Client Status Create Start Date Create Start Date Project Name All Client Name	Client Status Create Start Date Create End Date Project Name All Client Name OR Client Name	Client Status Create Start Date Create End Date Project Name All v Image: Client Start Date Project Name OI Image: Client Name OI Image: Client Name	Client Status Create Start Date Create End Date Project Name All Client Name OR Client Name	Maintain Customer Project Clie	ents		
Client Status Create Start Date Create Start Date Project Name All Client Name	Client Status Create Start Date Create End Date Project Name All Client Name OR Client Name	Client Status Create Start Date Create End Date Project Name All r Orante Orante Project Name OI OI OI OI OI OI	Client Status Create Start Date Create End Date Project Name	Q Projects			
OR Client Name	OR	OR OR	Client Name OR	-	Create Start Date	Create End Date	Project Name
Client Name	Client Name	Client Name	Client Name	All	¥	G	a
						OR	
				Client Name			
					Search V New Project		

3. In the Project dialog window, enter details of the new project.

Name *	
Client *	
	Ψ
• Create	
Address 1	
Address2	
Suburb	
Postcode	
Client Phone	
Client Email	
Budget	
Start Date	
End Date	
Comments	
Status	//
Active	Ŧ
	0.000
Cancel	O Create
ne: Project name. ent: Select existing Client or for a new one, click Create (see Crea dress & Contact fields: Enter the address and contact details. If ar ew Client, you can copy over the address and contact details. Edit lent *	n existing Client is used or you have just
ABC Pty Ltd (John J)	Ψ
A	

is re-calculated. **Start Date** / **End Date**: (optional) project start and end dates. **Comments:** notes relevant to the project.

4. Click Save. The new project is now listed in the Project list.

Office Caroling 400 Caroling 4500 00 Antice 400 00 5 Model	Project Name Client Address Budget Status Total Value Variance Options Office Furnishings New Offices Py Ltd (Jane 30 Lisburn Street EAST Smith) 15,000,00 Active \$2,223,24 \$12,774,75 left. Image: Comparison of the status Office Supplies ABC Py Ltd (John) 400 George Street. \$5,000,00 Active \$90,75 \$4,900,25 left. Image: Comparison of the status Office Supplies Add New Offices Py Ltd (Jane 30 Lisburn Street EAST Smith) \$500,00 Active \$90,75 \$4,900,25 left. Image: Comparison of the status Office Supplies Add New Offices Py Ltd (Jane 30 Lisburn Street EAST Smith) \$500,00 Active \$90,00 \$300,000 left. Image: Comparison of the status Warehouse 1 ABC Py Ltd (John) 400 George Street. \$3,000,00 Inactive \$10,00 \$30,000,00 left. Image: Comparison of the status							
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Smith) BRSBANE 4169 100% left Varehouse 1 ABC Pry Ltd (john J) 400 George Street: \$3,000.00 Inactive \$0.00 \$3,000.00 left 7 list 2 loss 2 loss	Smith) BRISBANE 4169 100% left Varehouse 1 ABC Pty Ltd (john (j)) 400 George Street \$3,000.00 Inactive \$0.00 \$3,000.00 left V Each @ Color	Office Supplies	ABC Pty Ltd (John J)	\$5,000.00	Active	\$90.75		
Prishara 4000	Peickare 4000	Office Supplies Add		\$500.00	Active	\$0.00		🖌 Edit 🛢 Delete
		Warehouse 1	ABC Pty Ltd (John J)	\$3,000.00	Inactive	\$0.00		🖌 Edit 🛢 Delete

Delete a Project

A Project can only be deleted if it has no linked orders, i.e., Delete button is not disabled (greyed).

Project Name	▲ ▼	Client 🖌	Address	Budget	Status	🔺 Total Value	Variance	Options
Office Furnishings		New Offices Pty Ltd (Jane Smith)	: 30 Lisburn Street EAST BRISBANE 4169	\$15,000.00	Active	\$2,225.24	\$12,774.76 left 85% left	View Orders Edit Delete
Office Supplies		ABC Pty Ltd (John J)	400 George Street Brisbane 4000	\$5,000.00	Active	\$90.75	\$4,909.25 left 98% left	View Orders Edit Delete
Office Supplies Add		New Offices Pty Ltd (Jane Smith)	30 Lisburn Street EAST BRISBANE 4169	\$500.00	Active	\$0.00	\$500.00 left 100% left	🖌 Edit

To delete a Project:

Office Supplies Add	New Offices Pty Ltd (Jane 30 Lisburn Street EAST \$500.00 Smith) BRISBANE 4169	Active	\$0.00	\$500.00 left 100% left	🖌 Edit 🛢 Del
2. In the Delete P	roject dialog, click Delete.				
Delete Pro	oject?				
Are you sure y	ou want to delete this Project?				
Cancel	🐠 Delete				

Admin tasks

Enable Customer Client Projects

Once the feature is switched on for your site, Administrators can enable/disable it in the CMS.

1. In the CMS, go to Settings Feature Management Content.

2. Ensure Customer Client Projects is toggled ON.

Feature Manag	ement		Q, customer dient projects	0
Q Search Results	<u>o</u> >	Feature	Available in CMS Options	
🖋 Content	<u>u</u> >	Customer Budgets Configure Customer Budgets Specific settings for your website-		
Payment & Checkout	•	Customer Client Projects Customer Client Project System.		

Your customers will now have access to Customer Client Maintenance and Project Maintenance.

Add Customer Client Projects pages for a Role

This task may have been done for your site.

For a Role to have access to this feature, add these two menu items to their Dashboard menu or as links on a page.

- Customer Client Project Maintenance page Menu Item Code: 'THEME_BPDTHEME01_CustomerClientProjectMaintenance'; Custom
 Page Code: 'Customer Client Project Maintenance'
- Customer Client Maintenance page Menu Item Code: 'THEME_BPDTHEME01_CustomerClientMaintenance'; Custom Page Code: 'Customer Client Maintenance'

In this example, the Customer Client Maintenance page is added to the Dashboard menu for the B2B role.

- 1. On your website, go to Content Menu Editor. (NOTE Menu Editor may have been added in your CMS.)
- 2. Click the radio button next to the Role (e.g., CSS for the B2B role).

Menu Code	e Menu Description
©_CSS	Customer Self Service - B2B
⊖ CSSASC	Customer Self Service - Accounts Only
	Customer Self Service Administration
Select Parent Items.	
Menu Code	Menu Description
CSS	Customer Self Service - B2B
⊖ CSSACC	Customer Self Service - Accounts Only
	Customer Self Service Administration
	Customer Self Service - User Administration
	Customer Self Service - Ordering Only
	Public
Modify : New :	Delete : Copy : Parent Items
6 records. (1 page)) 🔨 1

- 4. Select Menu Items.
- 5. Select New.

Menu Code :	Customer Self Service - B2B 🔹
Menu Item Code :	THEME_BPDTHEME01_CustomerClientMaintenance
Parent Item :	THEME_BPDTHEME01_Dashboard - Dashboard
Label for Navigation Pane :	My Clients
Description :	
Page Name :	
Custom Page Code :	Customer Client Maintenance
Sequence :	27
Menu Item Image Name :	
Menu Item Hover Image Name :	
Requires Authentication :	
Hidden :	0
Staging Only Item :	0
Show Navigation Order Summary :	0
Dashboard ✓ C ★ My Favourites	
:c 🛧 My Favourites চ্যে	
to ★ My Favourites	vailable only for logged in users) lay an icon next to the . e.g., cv-ico-general-briefcase
to ★ My Favourites	
to ★ My Favourites	

Edit Display Options

You can edit text for headings, fields and other labels in the widgets that render the pages and windows.

- Customer Client Maintenance page Maintain Customer Clients Widget
- Customer Client Project Maint page -Maintain Customer Client Projects Widget ٠
- Checkout page Order Project Selector Widget
 Add Client and Add Project windows Customer Client Project Dialogs Widget

NOTE - For Customer Client Projects to work fully, Customer Client Project Dialogs Widget must be added to the Customer Client Maintenance, Customer Client Project Maint, and Checkout pages.

Related help

- Maintain Customer Client Projects Widget
- Customer Client Project Dialogs Widget
- Maintain Customer Clients Widget
- Order Project Selector Widget