

# Add Cost Centre for Whole Order

Is this feature disabled?

Contact To Enable

For Version 4.37+.

This feature needs to be switched on for your site by Commerce Vision.

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## Overview

Cost centres allow your B2B customers to assign purchases to different budget areas of their business, e.g., departments, offices, branches. Cost centres are created at the Customer account level. Provision can be made to integrate cost centre codes from your ERP. They can also be linked to individual Customer Users. When set up for a customer account, the user can assign an order or order line to a cost centre before checkout. Use of cost centres can be set as optional or mandatory.

This guide adds a cost centre to the cart order header. For order line level cost centres, see: [Cost Centres](#).

The screenshot shows a shopping cart interface. At the top, there's a progress bar with four steps: 1. Cart (active), 2. Address & Shipping, 3. Payment, and 4. Summary. Below the progress bar, there's a table with columns: Product, Qty, Price (ex GST), Unit, Discount, GST, and Total (ex GST). The first row shows 'High Visibility Waterproof Safety Trousers, Small' with a quantity of 1, a price of \$24.95, and a total of \$24.95. Below the table, there's a section for delivery options with two radio buttons: 'Deliver the order to my postal address' (selected) and 'I will pick up the order in-store'. There's also a section for promo codes with a text input and an 'Apply Code' button. A 'Freight Estimate' section is also visible. At the bottom, there's a 'Cost Centre Code' section with a text input and an 'Apply Code' button, which is highlighted with a red box.

## Step-by-Step Guide

### Configure Cost Centres at header level settings

#### 1. Enable Cost Centres at header level


- Go to **Settings** **Settings** **Feature Management** **Products and Categories**.
- Toggle **ON Cost Centres**.

The screenshot shows the 'Feature Management' interface. On the left, there's a sidebar with a list of categories: Content, Payment & Checkout, Products & Categories (selected), System, and a search bar. The main area shows a table with columns: Feature, Available in CMS, and Options. The 'Cost Centres' feature is highlighted with a red box, showing it is 'Available in CMS' (toggle is on) and has a 'Configure' link. The 'Custom Catalogues' feature is also visible below it.

3. Click **Configure**.

4. In the **Cost Centres Feature Settings** screen, scroll down to the screen. Toggle ON **Use Header Level Cost Centre**.

5. If a customer user has to add a cost centre when placing an order, toggle ON **Enforce Cost Centre Required on Order Header**.

 If cost centres are set as mandatory, cost centre codes must be set up for the customer, otherwise the user will not be able to check out.

6. **Maintain User Cost Centres:** Toggle ON to allow cost centres at the user level to be maintained. Once this is enabled, options to access cost centre maintenance at customer and user levels are displayed. **NOTE** - User level cost centre maintenance will also be available via a user's *Edit User's* screen.



**Maintain User Cost Centres**

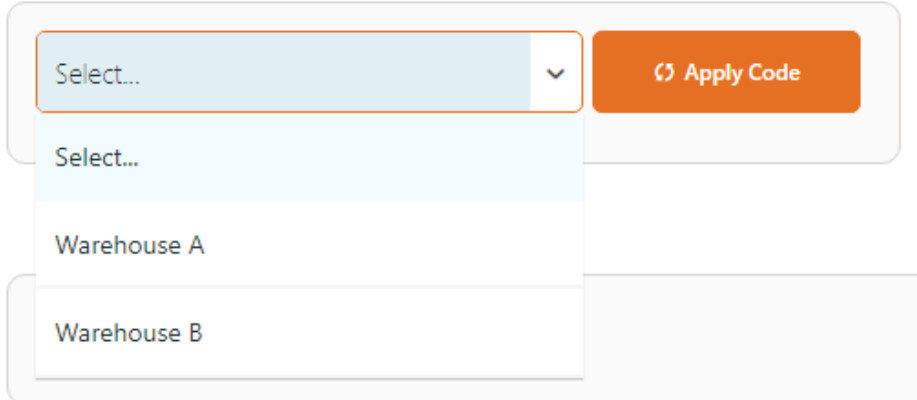
**Maintain Customer Cost Centres**

**Maintain User Cost Centres**

2. Add Header Level Cost Centre Widget to Cart template

This widget renders the Cost Centre Code box to display in the Cart page. Depending on settings, the user selects a cost centre or enters one.

## Cost Centre Code



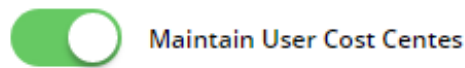
1. Go to **Content Content Pages & Templates Checkout Cart**, then click **Edit**.
2. In the zone you want the header cost centre box to display, click **Add Widget**.
3. Add the **Header Level Cost Centre Widget**.
4. (optional) Edit labels and text displayed, See: [Header Level Cost Centre Widget](#).

## Create a customer cost centre

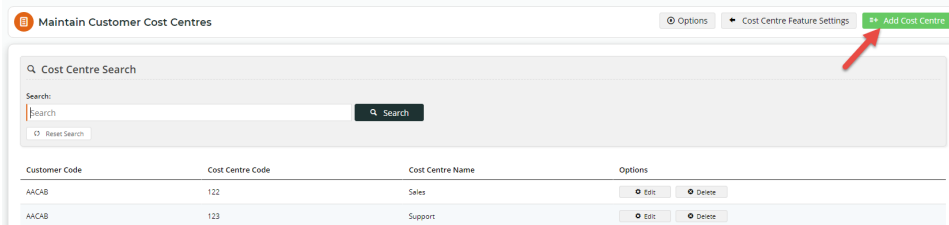
**NOTE** - A Cost Centre is always linked to a Customer but cost centres can be created and assigned at the Customer User level.

To create a cost centre at the customer level:

1. In the **Cost Centres Feature Settings** screen, ensure the **Maintain User Cost Centres** toggle is ON.



2. Click **Maintain Customer Cost Centres**.
3. In the **Maintain Customer Cost Centres** screen, any existing cost centres are listed. Click **Add Cost Centre**.



4. In **Customer**, select the customer code for this cost centre. **NOTE** - Make sure you're entering the Customer Code, not the Bill To Code.
5. In **Cost Centre Code**, enter a code for the new cost centre.
6. In **Cost Centre Name**, enter a name/description for the cost centre. This will be displayed to the user in the 'Select cost centre' dropdown list during the order process.
7. Click **Save**, or **Save & Add Another** if you want to add another new cost centre.

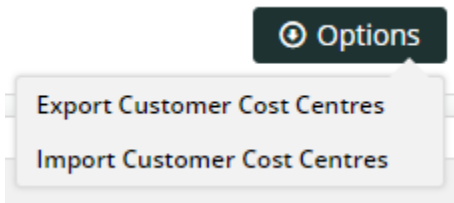
## Bulk Import/Export Cost Centres

Instead of maintaining cost centres manually, you can also bulk import/export them.

### Import Cost Centres

**IMPORTANT** - You should have the prepared .csv file ready to import before beginning. If you need, you can download a template in the Customer Cost Centre Import page.

1. In the **Maintain Customer Cost Centres** screen, hover over the **Options** button and select **Import Customer Cost Centres**.



2. Select the **Import Type** to use. **TIP** - Use **Append** adds new customer cost centres to the list of existing cost centres. Any duplicates will not be uploaded. Use **Overwrite** to add new customer cost centres and replace all existing cost centres.
3. Click **Select Files** and upload your cost centre .csv file. The import will automatically begin.

4. If successful, the following messages will display on the screen. Any duplicate cost centres will not be added. These will be mentioned. If unsuccessful, a fail message will display.

**Customer Cost Centre Import**

To import your customer cost centres, first select the required Import Type:

- Append - adds customer cost centres on the .csv file to any existing customer cost centres.
- Overwrite - replaces all existing customer cost centres with the customer cost centres on the .csv file.

Then, click 'Select Files' and browse to your saved .csv file. The import will start automatically and the Log will display feedback and results.

If errors are encountered (i.e. invalid customer codes), we'll cancel the import so that you can correct the data before trying again. Duplicate lines will be skipped and noted in the Import Log. We will not cancel the import.

For convenience, you can download an example template using the button below. Simply paste your own data into the appropriate columns and save in .csv format.

[Download Example Template](#)

**File Upload**  
Import Customer Cost Centre Data

Import Type: Append

✓ Done

customer-cost-centres.csv  
0.07 KB

**Import Log**

Import Successful

**Customer Cost Centre Import**

To import your customer cost centres, first select the required Import Type:

- Append - adds customer cost centres on the .csv file to any existing customer cost centres.
- Overwrite - replaces all existing customer cost centres with the customer cost centres on the .csv file.

Then, click 'Select Files' and browse to your saved .csv file. The import will start automatically and the Log will display feedback and results.

If errors are encountered (i.e. invalid customer codes), we'll cancel the import so that you can correct the data before trying again. Duplicate lines will be skipped and noted in the Import Log. We will not cancel the import.

For convenience, you can download an example template using the button below. Simply paste your own data into the appropriate columns and save in .csv format.

[Download Example Template](#)

**File Upload**  
Import Customer Cost Centre Data

Import Type: Append

✓ Done

customer-cost-centres.csv  
0.09 KB

**Import Log**

Line 2: Error: (AACAI) Invalid Customer Code.  
Line 3: Warning: (Sales) No need to import as cost centre is already present

## Export Cost Centres

The Export function lets you download a .csv file containing all cost centres.

1. In the **Maintain Customer Cost Centres** screen, hover over the **Options** button and select **Export Customer Cost Centres**.
2. The file will automatically download. To view the file, click **Open file**.



## Assign Cost Centre to a Customer User



When Maintain User Cost Centres is enabled, you can also access this function via each user's [Edit page](#).

To create a cost centre at the customer use level:

1. In the **Cost Centres Feature Settings** screen, ensure the **Maintain User Cost Centres** toggle is ON.
2. Click **Maintain User Cost Centres**.
3. In the **Maintain User Cost Centres** screen, any existing User Customer cost centre assignments are listed. Click **Add Cost Centre**.

4. In **User**, select the user.
5. Depending on the User, in **Customer**, linked customer accounts are displayed. Select the customer.
6. In **Cost Centre**, from the dropdown list, select a code. **NOTE** - if there are no cost centres, you cannot proceed with assigning a cost centre to this user.
7. Click **Save**, or **Save & Add Another** if you want to assign another cost centre to a user.

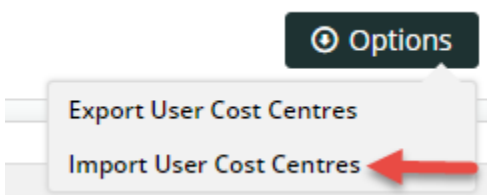
## Bulk Import/Export User Cost Centres

Instead of maintaining cost centres for users manually, you can also bulk import/export them.

### Import User Cost Centres

**IMPORTANT** - You should have the prepared csv file ready to import before beginning. You can download a template in the User Cost Centre Import page.

1. In the **User Cost Centre Import** screen, hover over the **Options** button and select **Import Customer Cost Centres**.

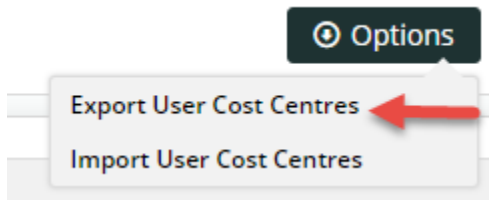


2. Select the **Import Type** to use. **TIP** - Use **Append** adds new customer user cost centres to the list of existing ones. Any duplicates will not be uploaded. Use **Overwrite** to add new customer user cost centres and replace all existing cost centres.
3. Click **Select Files** and upload your cost centre .csv file. The import will automatically begin.

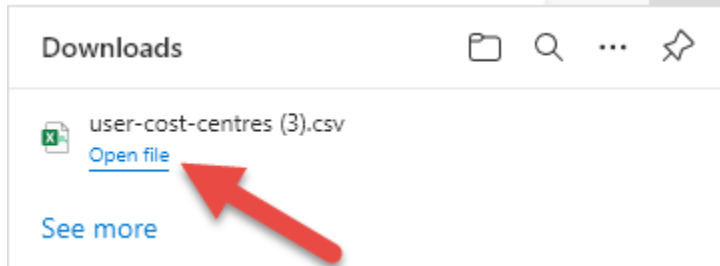
### Export Customer User Cost Centres

The Export function lets you download a .csv file containing all customer users and their cost centres.

1. In the **User Cost Centres** screen, hover over the **Options** button and select **Import User Cost Centres**.



2. The file will automatically download. To view the file, click **Open file**.



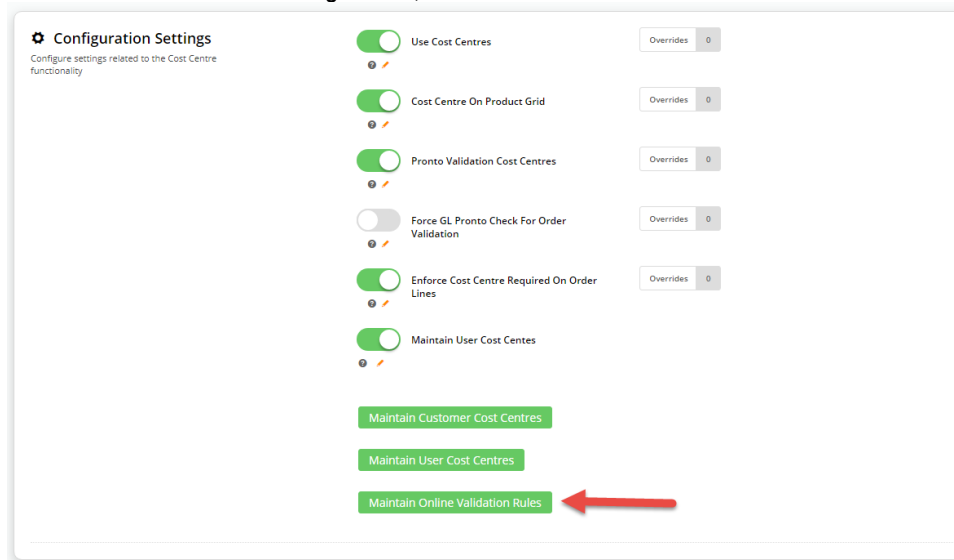
## Maintain Online Validation Rules

This function allows you to maintain online cost centre validation rules and cost centre defaults. **NOTE** - The **Pronto Validation Cost Centres** toggle must be enabled for validation checks to be applied on the website.

**NOTE** - There can only be one active validation rule against a customer at any one time, with the exception of Bill To level validation rules where a customer level rule will override any Bill To ones.

To add a new validation rule:

1. In the **Cost Centres Feature Settings** screen, click the **Maintain Online Validation Rules**.



2. Click **Add New Validation Rule**.

3. In the **Add New Validation Rule** page, enter the values for the validation rule.

The screenshot shows the 'Add New Validation Rule' interface. It includes a title bar with navigation buttons and a main settings area. The settings area contains fields for Description, Customer, Is Enabled, Is Bill To, Copy Previous Value, and Help Text. At the bottom, there is a Segments section with an 'Add Segment' button.

- a. **Description:** enter a suitable description for this rule.
- b. **Customer:** select the customer code this rule applies to.
- c. **Is Enabled:** toggle ON/OFF to enable/disable this rule.
- d. **Is Bill To:** toggle ON if this rule is for a Bill To code and will apply for all customer codes with that Bill To.
- e. **Copy Previous Value:** toggle ON to copy the cost centre value from the previous line in the order if no cost centre is selected.
- f. **Help Text:** if online validation is being used, enter a useful tip that displays for the user when entering or selecting the cost centre code.

## Add a validation rule segment

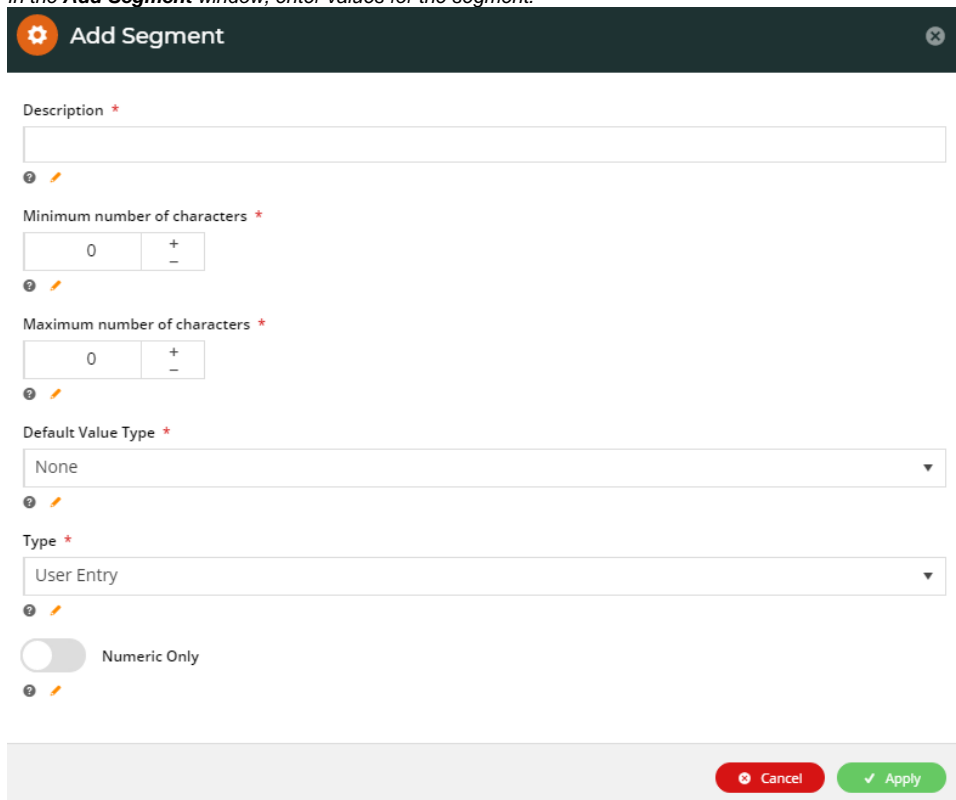
Validation rule segments allow you to define how the cost centre code must be entered for each customer code. Valid codes may differ from customer to customer and can be segmented. Segments allow parts of a code to be validated individually. For example, a code like 'AB12345' has one segment and 'AB-345-67' has three. We would only need to create and define one segment rule for 'AB12345', but three for 'AB-345-67'. A segment rule can be set by the number of characters, value type and entry type. **NOTE** - So that the code can be correctly validated, only the last segment can have different values for the minimum and maximum number of characters.

To add a segment:

1. While in the validation rule, click the **Add Segment** button.



2. In the **Add Segment** window, enter values for the segment.

The 'Add Segment' window is a dark-themed dialog box with a title bar containing a gear icon and a close button. It contains several form fields: a 'Description' text box, 'Minimum number of characters' and 'Maximum number of characters' spinners (both set to 0), a 'Default Value Type' dropdown menu (set to 'None'), a 'Type' dropdown menu (set to 'User Entry'), and a 'Numeric Only' toggle switch (currently off). Each field has a small help icon (question mark) and an edit icon (pencil). At the bottom right, there are 'Cancel' and 'Apply' buttons.

- a. **Description:** enter a suitable description for this segment.
- b. **Minimum number of characters:** enter the minimum number of characters for this segment.
- c. **Maximum number of characters:** enter the maximum number of characters for this segment.
- d. **Default Value Type:** select **None**: no default value; **Fixed value**: default value; **List**: user selects from list.
- e. **Type:** select the value entry type. **User Entry**: allow user to enter; **Fixed Value**: enter a **Default Value** that must be used in this segment; **List**: display a list for the user to select a value.
- f. **Numeric Only:** toggle ON if only numerical values are allowed to be entered in this segment.

3. To save this segment, click **Apply**.

4. Define more segments for this code if required.

## Related help

- [Cost Centres](#)
- [Force User to Select Customer Upon Login](#)
- [Assign Multiple Customer Accounts to a User](#)
- [Add Cost Centre for Whole Order](#)
- [User Budgets](#)