Converting a debtor code on the website

If a debtor code is converted in your ERP System, it will be necessary to perform the same conversion online so that orders, users, and catalogues are converted to the new account.

The conversion process takes place in two environments - the ERP System, and the website. The steps of the process are as follows:

1. The new account code is created in the ERP System (e.g. PRONTO).
2. The new account code is integrated to the website.
3. The debtor conversion is performed on the web (see Step-by-step guide below).
4. The debtor conversion is performed in the ERP system.

> ⓘ To avoid issues, it is important to follow the above steps of the conversion process in order.
>
> For example - if a new account code is created in PRONTO and immediately merged with the old code, the old account code will be removed from the web once the Integrator runs. This then prevents the online conversion process, as the old account code is unable to be found. Any users attached to the old account code will also be unable to login, as they will no longer be attached to a valid debtor code.

Step-by-step guide

To Convert a Debtor Account online:

1. *Login as an Administrator.*
2. *Navigate to **'Accounts'** --> **'Account Selection'** (zAccounts.aspx).*
3. *Search for the required account code.*
4. *Select the record via radio button.*
5. *Click **'Change Code'**.*
6. *Enter the new account code.*
7. *Click **'OK'** to save changes.*

> ✅ Alternatively, the Integrator can manage the Pronto-to-web conversion process automatically. Refer to Integrator - Customer Conversions for more information.

Related help

- Settings and Functions Available in the PRONTO Order and Receipt Import Program
- User Debtor Integration
- Integrator - Remote Access Requirements and Minimum Specifications
- CSS ERP Interface Controls
- Bonus Items