

# User Debtor Integration

## Overview

User Debtor Integration allows for 2-way integration between certain Website Users and PRONTO debtors. For most sites that use this feature, Users are typically the B2C Roles but can be custom-defined B2B ones as well, depending on your business needs. The integration process ensures that when Website Users matching your User Debtor criteria register accounts, corresponding PRONTO customers will also be created. Likewise, new PRONTO debtor customers will trigger the creation of linked Website Users. Integration also extends to User and customer updates. For example, if a User changes their shipping address online, their linked PRONTO customer record will also be updated.

User Debtor Integration is primarily of use to our clients that use an ERP as well as online to maintain customer records, e.g., those with physical, brick and mortar shopfronts. The process is there to ensure customer experience is synchronised and consistent across the various retail channels. Order history is maintained, communication is uninterrupted, and data is always up-to-date. Depending on your website version, this feature can also ensure that for Users that are active in more than one Customer account, their User records are always updated against specific Customers.

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## Implementation

Due to complex field mappings between your ERP (PRONTO) and the website, it is not advisable that this functionality is self-implemented. If you're interested in User Debtor Integration for your site, please [contact Commerce Vision](#) for guidance.

## Example scenarios

### 1. Online to PRONTO

Any time a Website User that matches your PRONTO User Debtor criteria is created, a linked PRONTO customer will be created.

- A new User registers on your website.
- If their default role matches your User Debtor criteria, a new PRONTO account is automatically created.
- The User logs into your site and updates their details (billing address, phone number).
- On integration, the PRONTO record is also updated.
- The User enters one of your physical store locations and makes a purchase.
- At the point of sale, their email address is queried and the transaction is linked to their PRONTO customer account, ensuring order history data is complete.
- The User logs in and navigates to the Order History page.
- All orders, both online and in store, are visible in the User's history.

### 2. PRONTO to online

When a new PRONTO debtor customer record is created, it will trigger the creation of a linked Website User on your website.

- There is a new offline customer, e.g., they enter your retail location and makes a purchase, are added by your sales rep, or their credit account application is successful, etc.
- A new PRONTO account is created.
- On integration, a linked Website User is created.
- The new User is sent an email advising them of their Website login details. **NOTE** - if Auto Part Registration is active for a Customer account, the User must be approved before the registration process continues.
- The User logs in and can now:
  - update contact and delivery information
  - view Order History
  - purchase online.



For sites on versions 4.31, an enhancement is available for scenarios where a debtor user is linked to more than one debtor customer account (using CrmContacts and Crm Master) in PRONTO. On integration, the system checks all Website User records against contacts for debtor customers. A User record linked to a specific Customer will be created if one does not exist. The User will be sent a new user registration email.

**Example:**

1. There is a new offline customer or an additional contact is entered for an existing debtor customer.
2. For the new customer, a debtor customer PRONTO account is created.
3. On integration, the system checks User Customer records for Customers flagged as Debtor customers. A Website User linked to the Customer is created if it does not exist.
4. The User is sent a registration email advising them of their Website login details.

## Sample Emails

Content of emails can be edited in the following templates via the **Content** menu (**Content Emails**):

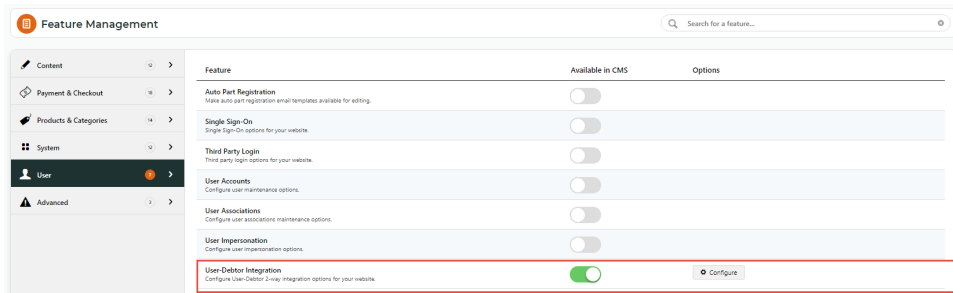
- User Debtor New User Email
- User Debtor Warning / Error Email

| User Debtor New User Email                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | User Debtor                                                                                                                                                                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Commerce Vision BPD <br><br><h2>Welcome</h2><br><br>Hi Katie<br>You are now registered for the online store.<br>Your login ID is <a href="mailto:katie@commercevision.com.au">katie@commercevision.com.au</a><br>Set your password on your account by clicking <a href="#">set password</a> .<br>By setting a password, you agree to the <a href="#">terms and conditions</a> .<br><br>Regards,<br>BPD UAT<br><br>Phone: (07) 3369 3733<br>Fax: (07) 3891 3996<br><a href="https://bpduat.customer-self-service.com">https://bpduat.customer-self-service.com</a><br>Copyright © 2018 BPD UAT. All rights reserved. |  Co<br><br><h2>Error</h2><br><br>New Custom<br>the attempt<br>did not conti<br><br>Please Inves<br><br>CustomerCi<br><br>Regards,<br>BPD UAT<br><br>Phone: (07)<br>Fax: (07) 38 |

## User Debtor Settings

If applicable, these settings are available after implementation of the User Debtor feature for your site.

1. Navigate to **Settings Feature Management User**.
2. Toggle **ON User Debtor Integration**, then click **Configure**. **NOTE** - If this toggle is not available, contact Commerce Vision.



3. Configure settings in the **User Debtor Feature Settings** page.

| Setting                                                   | Comment                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Enable User Debtor Setting</b>                         | To enable the User Debtor on your site, toggle ON.                                                                                                                                                                                                                                                                                                                            |
| <b>User Roles that require a PRONTO Account</b>           | <p>Enter one or more user Roles that trigger creation of a PRONTO debtor. For multiple role entry, each role entered must be separated by a comma.</p> <p>When a user is assigned one of these roles online, upon integration, a PRONTO debtor is created.</p>                                                                                                                |
| <b>Prefix for New PRONTO Accounts</b>                     | <p>Enter the prefix that added to the debtor code when it's created in PRONTO. This is prepended to a numeric value and assigned as the website user's customer code.</p> <p>Example: WEB_</p>                                                                                                                                                                                |
| <b>Customer Template for New PRONTO Accounts</b>          | Enter the base PRONTO debtor code that all new customers are copied from. Using this ensures correct pricing structure, tax code, etc.                                                                                                                                                                                                                                        |
| <b>Default Role for New Web Users</b>                     | Enter the default role the new user is assigned online when a customer makes an instore purchase and the new PRONTO debtor triggers creation of the website user.                                                                                                                                                                                                             |
| <b>Send Warning Emails To</b>                             | <p>Enter the email address for receipt of errors and warnings sent by the system. Examples of notifications: when a PRONTO debtor is deleted, a PRONTO debtor's email address is updated to one that already exists online.</p> <p>For more on each email's content, see: <a href="#">User Debtor Warning /Error Widget</a>, <a href="#">User Debtor New User Widget</a>.</p> |
| <b>Filter Query for Customer Master table integration</b> | Enter the query used to filter records sent by the integrator when a send of 'Customer Master For Users' is triggered (e.g. dr-cust-type like "WEB_").                                                                                                                                                                                                                        |
| <b>Filter Query for CSS Customer table integration</b>    | Enter the query that matches the 'Filter Query for Customer Master table integration' but is used for integration of the CSS Customer table instead.                                                                                                                                                                                                                          |
| <b>Web Fields for New PRONTO Account Creation</b>         | <p>Enter the comma-separated list of online fields sent to PRONTO for the creation of the new debtor.</p> <p>Example: Code,OrderEmailAddress,Name,Address1,Address2,Address3,Address4,Address5,Address6,PhoneNumber,Postcode,ABN,addressname,industrycode</p>                                                                                                                 |
| <b>Web Fields to Sync with PRONTO</b>                     | Enter the online fields sent to PRONTO for updates to the debtor.                                                                                                                                                                                                                                                                                                             |

## Additional Information

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|-------------------------------------|----------|
| <b>Minimum Version Requirements</b> | 03.88.00 |
|-------------------------------------|----------|

|                          |                                                                        |
|--------------------------|------------------------------------------------------------------------|
| <b>Prerequisites</b>     | Commerce Vision Integrator version 4.63<br>PRONTO proledb version 3.11 |
| <b>Self Configurable</b> | No                                                                     |
| <b>Business Function</b> | User                                                                   |
| <b>BPD Only?</b>         | Yes                                                                    |
| <b>B2B/B2C/Both</b>      | B2C                                                                    |
| <b>Third Party Costs</b> | n/a                                                                    |

## Related help

- [Settings and Functions Available in the PRONTO Order and Receipt Import Program](#)
- [Integrator - Remote Access Requirements and Minimum Specifications](#)
- [PRONTO Order Status for uploaded orders](#)
- [PRONTO - Data Integration Guide](#)
- [Preventing certain order status from integrating](#)
- [User Debtor Warning / Error Widget](#)
- [User Debtor New User Details Widget](#)