

# Customer Client Projects

 *Customer Client Projects must be switched on by Commerce Vision.*

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.

**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.

Search Results

2 records (2 pages)

| Project Name       | Client                            | Address                          | Budget      | Status | Total Value | Variance          | Options                                          |
|--------------------|-----------------------------------|----------------------------------|-------------|--------|-------------|-------------------|--------------------------------------------------|
| Office Furnishings | New Offices Pty Ltd (New Offices) | 20 Collins Street (447) (New)    | \$14,000.00 | Active | \$1,382.79  | \$13,457.21 (96%) | <a href="#">View Details</a> <a href="#">Add</a> |
| Office Supplies    | ABC Pty Ltd (John J.)             | 401 George Street (Business 402) | \$5,000.00  | Active | \$90.79     | \$4,909.21 (98%)  | <a href="#">View Details</a> <a href="#">Add</a> |

## On this page:

- [How it works for your customers](#)
- [Client and Project Maintenance](#)
  - [Maintain Customer Clients](#)
    - [Create a Client](#)
  - [Maintain Customer Client Projects](#)
    - [Create a Client Project](#)
    - [Delete a Project](#)
- [Admin tasks](#)
  - [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.

Purchase

**Project**

-- No Project Selected --

-- No Project Selected --

Office Furnishings (New Offices Pty Ltd)

New Project

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

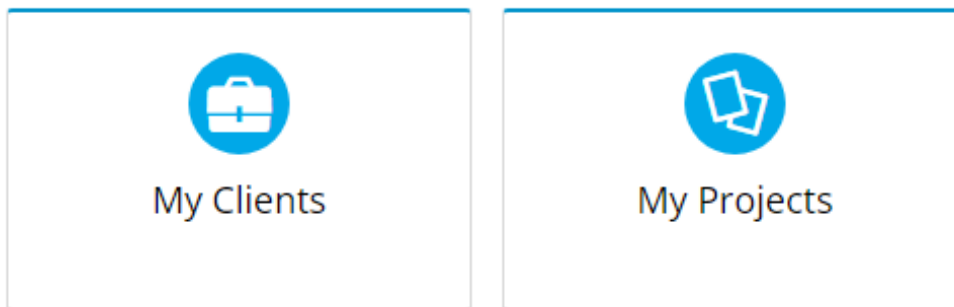
The image shows two side-by-side forms. The left form is titled 'Project' and contains fields for Name, Client (dropdown), Address 1, Address 2, Suburb, Postcode, Client Phone, Client Email, Budget, Start Date, End Date, Comments, and Status (dropdown). It has 'Cancel' and 'Create' buttons at the bottom. The right form is titled 'Client' and contains fields for Name, Contact Name, Address 1, Address 2, Suburb, Postcode, Client Phone, Client Email, Comments, and Status (dropdown). It has 'Cancel' and 'Create' buttons at the bottom. A red arrow points from the 'Create' button in the Project form to the Client form.

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.

*Go to **Dashboard Menu** **My Clients** / **My Projects**. (NOTE - This page is usually added to the Dashboard menu but you can add it elsewhere else on the Home page.*



## Maintain Customer Clients

This page lets your customers view and maintain their clients.



### Maintain Customer Clients

🔍 Clients

Client Status

Create Start Date

Create End Date

All

▼

📅

📅

OR

Client Name

🔍 Search

➕ New Client



1 records (1 page)

| Client                           | Address                              | Status | Options                                       |
|----------------------------------|--------------------------------------|--------|-----------------------------------------------|
| New Offices Pty Ltd (Jane Smith) | 30 Lisburn Street EAST BRISBANE 4169 | Active | <button>Edit</button> <button>Delete</button> |

## 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:

1. Go to **Dashboard Menu My Clients**.
2. Click **New Client**.

**Clients**

Client Status  Create Start Date  Create End Date

All  OR

Client Name

☒ 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

Active ▾

Cancel

Create

**Name:** Client/company name.

**Contact Name:** Contact person's name.

**Address & contact fields:** Client address and contact details.

**Comments:** notes relevant to the client.

**Status:** Active or Inactive. Inactive clients cannot be selected and linked to an project.

4. To save, click **Create**.

## Maintain Customer Client Projects

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

**Q Projects**

Client Status Create Start Date Create End Date Project Name

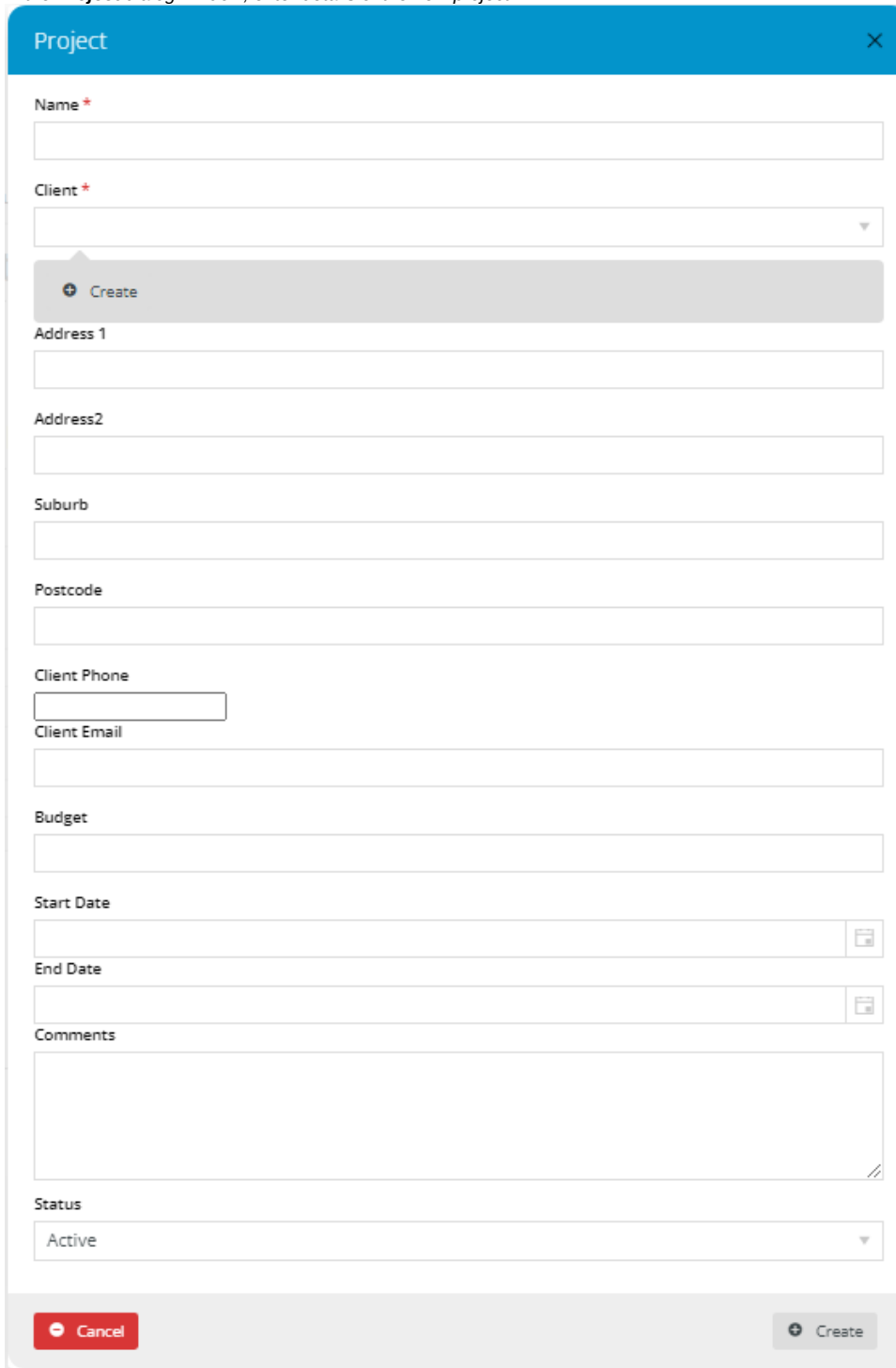
All [ ] [ ] [ ] [ ]

OR

Client Name

[ Search ] [ New Project ]

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



**Name:** Project name.

**Client:** Select existing Client or for a new one, click **Create** (see Create a Client).

**Address & Contact fields:** Enter the address and contact details. If an existing Client is used or you have just created a new Client, you can copy over the address and contact details. Edit if needed.

**Client \***

ABC Pty Ltd (John J)

+ Create Copy Address to Project

**Budget:** (optional) Enter dollar limit of project. Each time an order is placed against the project, the remaining budget is re-calculated.

**Start Date / End Date:** (optional) project start and end dates.

**Comments:** notes relevant to the project.

**Status:** Active or Inactive. Inactive projects cannot be selected and linked to an order.

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

| Project Name        | Client                           | Address                                 | Budget      | Status   | Total Value | Variance                     | Options                                                                    |
|---------------------|----------------------------------|-----------------------------------------|-------------|----------|-------------|------------------------------|----------------------------------------------------------------------------|
| Office Furnishings  | New Offices Pty Ltd (Jane Smith) | 30 Lisburn Street EAST<br>BRISBANE 4169 | \$15,000.00 | Active   | \$2,225.24  | \$12,774.76 left<br>85% left | <a href="#">View Orders</a> <a href="#">Edit</a><br><a href="#">Delete</a> |
| Office Supplies     | ABC Pty Ltd (John J)             | 400 George Street<br>Brisbane 4000      | \$5,000.00  | Active   | \$90.75     | \$4,909.25 left<br>98% left  | <a href="#">View Orders</a> <a href="#">Edit</a><br><a href="#">Delete</a> |
| Office Supplies Add | New Offices Pty Ltd (Jane Smith) | 30 Lisburn Street EAST<br>BRISBANE 4169 | \$500.00    | Active   | \$0.00      | \$500.00 left<br>100% left   | <a href="#">Edit</a> <a href="#">Delete</a>                                |
| Warehouse 1         | ABC Pty Ltd (John J)             | 400 George Street<br>Brisbane 4000      | \$3,000.00  | Inactive | \$0.00      | \$3,000.00 left<br>100% left | <a href="#">Edit</a> <a href="#">Delete</a>                                |

4 records (1 page)

## 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<br>BRISBANE 4169 | \$15,000.00 | Active | \$2,225.24  | \$12,774.76 left<br>85% left | <a href="#">View Orders</a> <a href="#">Edit</a><br><a href="#">Delete</a> |
| Office Supplies     | ABC Pty Ltd (John J)             | 400 George Street<br>Brisbane 4000      | \$5,000.00  | Active | \$90.75     | \$4,909.25 left<br>98% left  | <a href="#">View Orders</a> <a href="#">Edit</a><br><a href="#">Delete</a> |
| Office Supplies Add | New Offices Pty Ltd (Jane Smith) | 30 Lisburn Street EAST<br>BRISBANE 4169 | \$500.00    | Active | \$0.00      | \$500.00 left<br>100% left   | <a href="#">Edit</a> <a href="#">Delete</a>                                |

To delete a Project:

1. Click **Delete** next to the Project.

|                     |                                  |                                         |          |        |        |                            |                                             |
|---------------------|----------------------------------|-----------------------------------------|----------|--------|--------|----------------------------|---------------------------------------------|
| Office Supplies Add | New Offices Pty Ltd (Jane Smith) | 30 Lisburn Street EAST<br>BRISBANE 4169 | \$500.00 | Active | \$0.00 | \$500.00 left<br>100% left | <a href="#">Edit</a> <a href="#">Delete</a> |
|---------------------|----------------------------------|-----------------------------------------|----------|--------|--------|----------------------------|---------------------------------------------|

2. In the **Delete Project** dialog, click **Delete**.

Delete Project?

Are you sure you want to delete this Project?

[Cancel](#) [Delete](#)

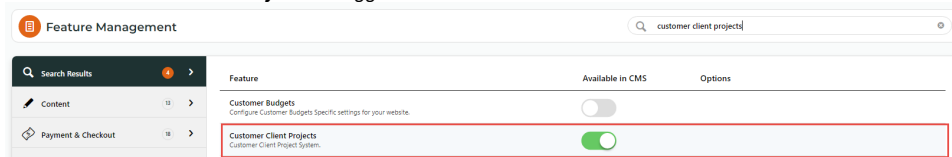
## Admin tasks

### 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**.



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 | Menu Description                      |
|----------------------------------|-----------|---------------------------------------|
| <input checked="" type="radio"/> | CSS       | Customer Self Service - B2B           |
| <input type="radio"/>            | CSSACC    | Customer Self Service - Accounts Only |
| <input type="radio"/>            | CSSADMIN  | Customer Self Service Administration  |

3. Select **Parent Items**.

|                                  | Menu Code    | Menu Description                            |
|----------------------------------|--------------|---------------------------------------------|
| <input checked="" type="radio"/> | CSS          | Customer Self Service - B2B                 |
| <input type="radio"/>            | CSSACC       | Customer Self Service - Accounts Only       |
| <input type="radio"/>            | CSSADMIN     | Customer Self Service Administration        |
| <input type="radio"/>            | CSSADMINUSER | Customer Self Service - User Administration |
| <input type="radio"/>            | CSSORD       | Customer Self Service - Ordering Only       |
| <input type="radio"/>            | PUBLIC       | Public                                      |

 [Modify](#) : [New](#) : [Delete](#) : [Copy](#) : [Parent Items](#)

6 records. (1 page) 1

4. Select **Menu Items**.
5. Select **New**.



6. Edit the required fields:

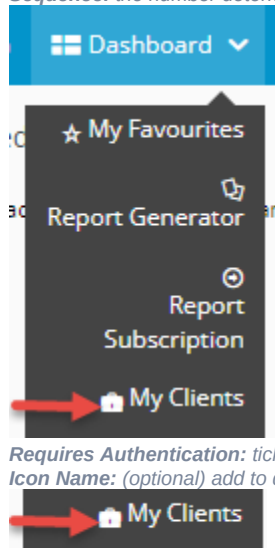
|                                 |                                            |
|---------------------------------|--------------------------------------------|
| Menu Code :                     | Customer Self Service - B2B                |
| Menu Item Code :                | THEME_BPDTHEME01_CustomerClientMaintenance |
| 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 :       | <input checked="" type="checkbox"/>        |
| Hidden :                        | <input type="checkbox"/>                   |
| Staging Only Item :             | <input type="checkbox"/>                   |
| Show Navigation Order Summary : | <input type="checkbox"/>                   |

**Menu Item Code:** THEME\_BPDTHEME01\_CustomerClientMaintenance

**Label for Navigation Pane:** Name displayed as menu item, e.g., 'My Clients'

**Custom Page Code:** Find 'Customer Client Maintenance'

**Sequence:** the number determines the order of this menu item in the navigation menu. Edit to change order.



**Requires Authentication:** tick (available only for logged in users)

**Icon Name:** (optional) add to display an icon next to the . e.g., cv-ico-general-briefcase

7. To save, click **OK**.

## 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](#)
- 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](#)

