

# Add Cost Centre for Whole Order

Is this feature disabled?

Contact To Enable

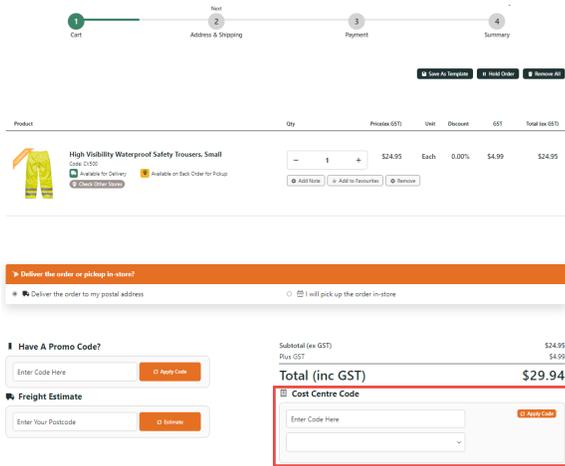
This feature needs to be switched on for your site by Commerce Vision.

For Version 4.37+.

## 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](#).



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## Step-by-Step Guide

### Configure Cost Centres at header level settings

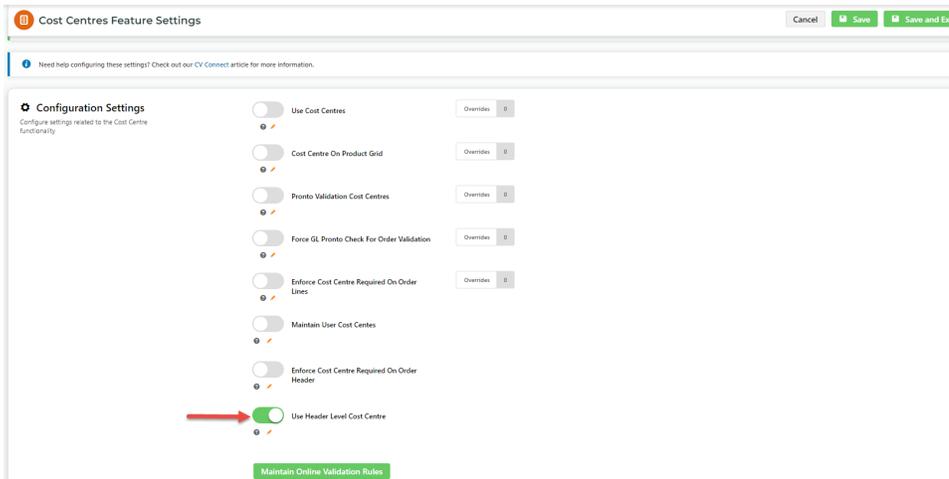
#### 1. Enable Cost Centres at header level

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



3. Click **Configure**.

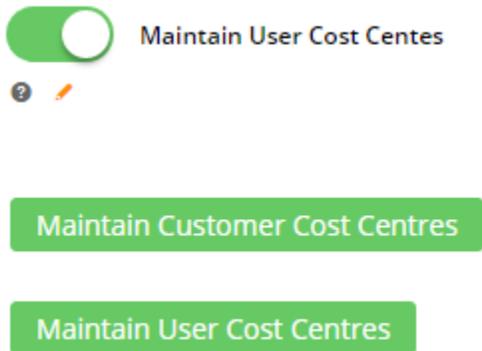
4. In the **Cost Centres Feature Settings** screen, scroll down to the screen. Toggle **ON Use Header Level Cost Centre**.



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.

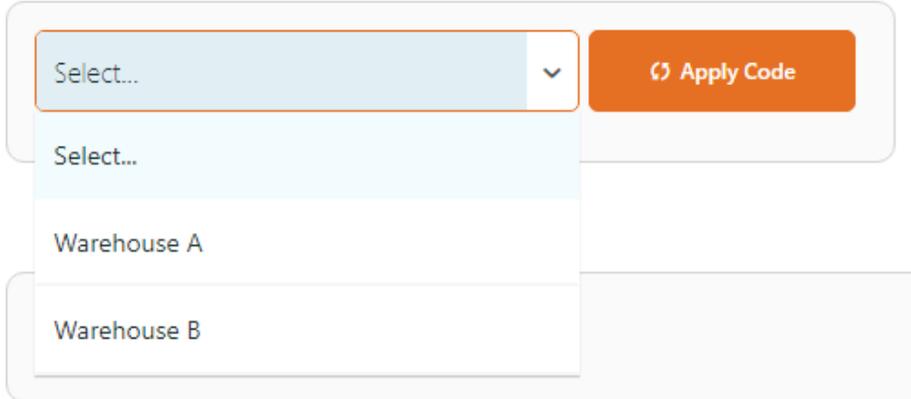
6. **Maintain User Cost Centres:** Toggle **ON** to allow cost centres at the user level to be maintained. Once this is enabled, options to access cost centre maintenance at customer and user levels are displayed. **NOTE** - User level cost centre maintenance will also be available via a user's *Edit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



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



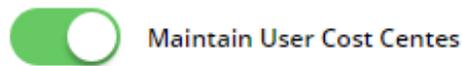
1. Go to **Content Content Pages & Templates Checkout Cart**, then click **Edit**.
2. In the zone you want the header cost centre box to display, click **Add Widget**.
3. Add the **Header Level Cost Centre Widget**.
4. (optional) Edit labels and text displayed, See: [Header Level Cost Centre Widget](#).

## Create a customer cost centre

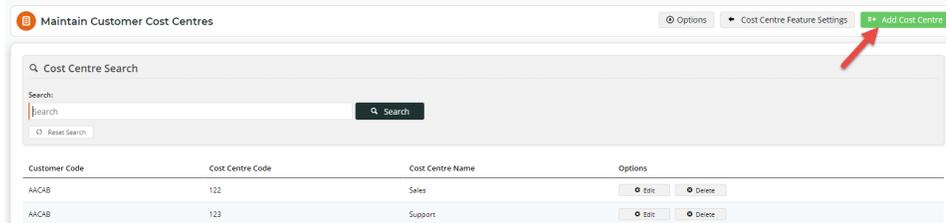
**NOTE** - A Cost Centre is always linked to a Customer but cost centres can be created and assigned at the Customer User level.

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.

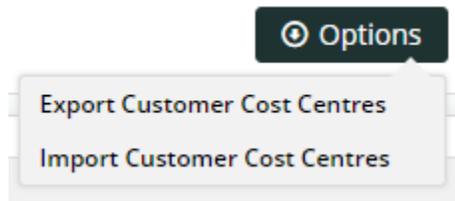
## Bulk Import/Export Cost Centres

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.

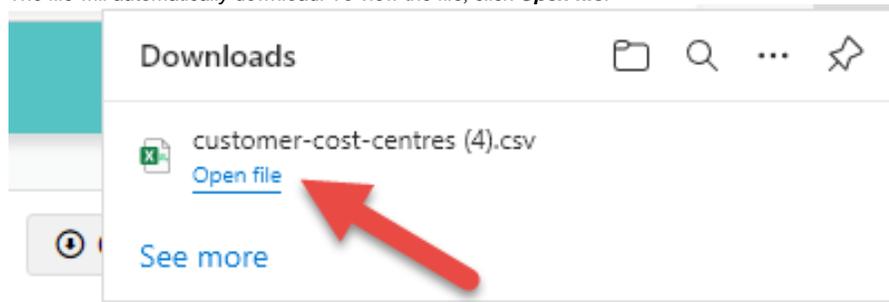
The top screenshot shows the 'Customer Cost Centre Import' interface. A green notification box in the top right corner displays 'Import Successful' with a checkmark icon and the text 'Customer Cost Centre information has been successfully imported'. Below this, the 'File Upload' section shows the 'Import Type' set to 'Append' and a file named 'customer-cost-centres.csv' (0.07 KB) selected. The 'Import Log' section at the bottom shows 'Import Successful'.

The bottom screenshot shows the same interface but with a red notification box in the top right corner displaying 'Import Failed' with a close icon and the text 'Please see error messages in the Import Log section below'. The 'Import Log' section at the bottom shows two messages: 'Line 2: Error: (AACA) Invalid Customer Code.' and '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**.



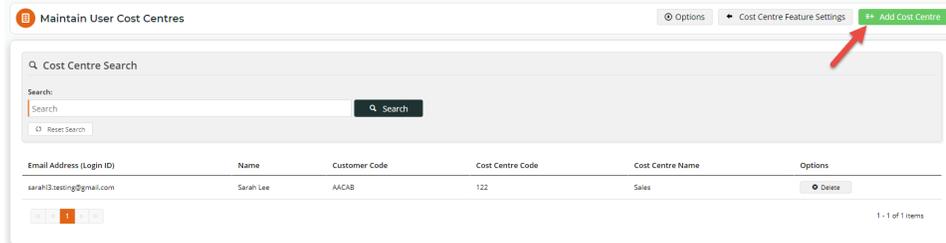
## Assign Cost Centre to a Customer User



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.

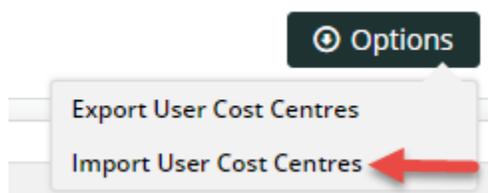
## Bulk Import/Export User Cost Centres

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**.

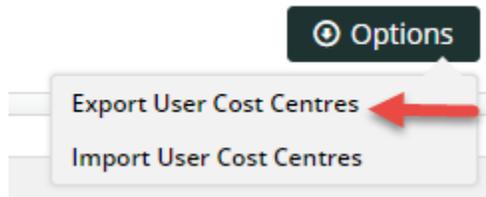


2. Select the **Import Type** to use. **TIP** - Use **Append** adds new customer user cost centres to the list of existing ones. Any duplicates will not be uploaded. Use **Overwrite** to add new customer user cost centres and replace all existing cost centres.
3. Click **Select Files** and upload your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

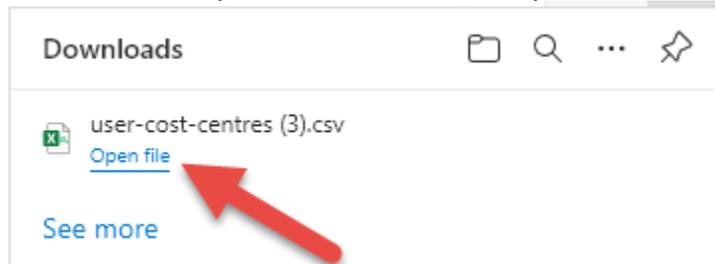
### Export Customer User Cost Centres

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**.



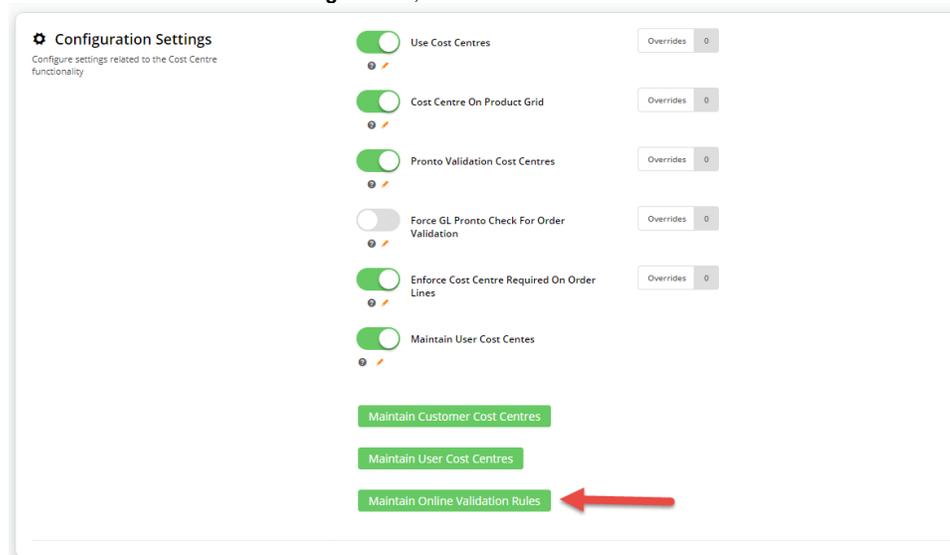
## Maintain Online Validation Rules

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.

**i** **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. At the top, there are navigation buttons: 'Options', 'Back', 'Save', and 'Save & Exit'. The main content area is titled 'Validation Rule Settings' and includes a sub-section 'Validation Rule related values'. This section contains the following fields and controls:

- Description**: A text input field.
- Customer**: A dropdown menu.
- Is Enabled**: A toggle switch.
- Is Bill To**: A toggle switch.
- Copy Previous Value**: A toggle switch.
- Help Text**: A text input field.

At the bottom of the page, there is a 'Segments' section with the text 'Manage the segments for this Validation Rule' and 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.

**Add Segment**

Description \*

Minimum number of characters \*

Maximum number of characters \*

Default Value Type \*

Type \*

Numeric Only

Cancel Apply

- 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](#)