

Customer Activation

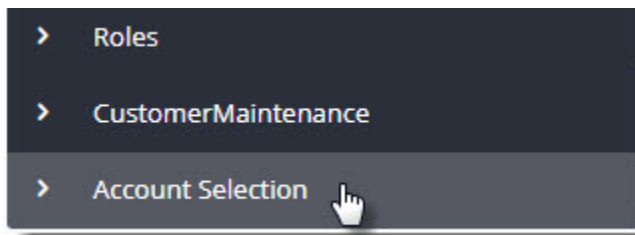
A customer needs to be activated online to ensure their debtor transactions and sales orders are integrated. The Commerce Vision Integrator does not, by default, integrate data for **all** customers as this can cause unnecessary data integration and overhead.

A customer must be at a status of '**Active**' to have their data (orders and statement data) integrated.

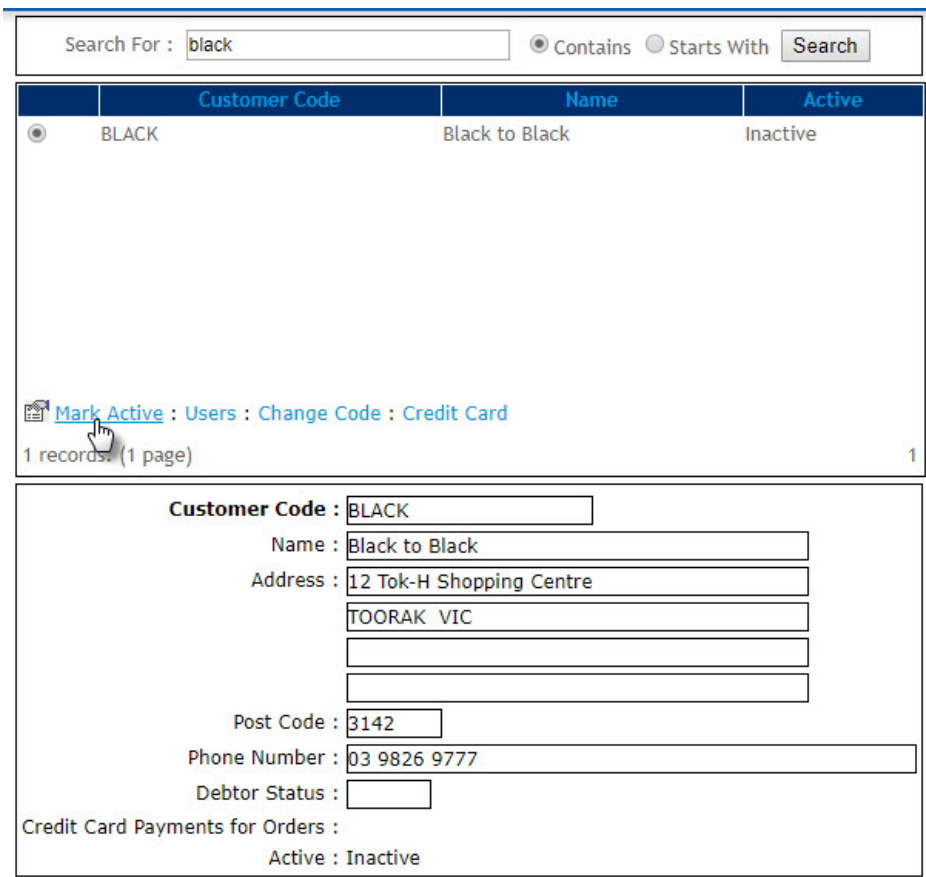
Step-by-step guide

To mark a customer account Active:

1. In the CMS, navigate to **Users Account Selection**.



2. Search for and select the required Customer.
3. Click the '**Mark Active**' link. This will set the customer to '**Pending**' and their data will be available after the next '**Get Orders**' integration event.

A screenshot of the CMS interface showing search results and customer details. At the top, there is a search bar with 'black' entered, and radio buttons for 'Contains' (selected) and 'Starts With', followed by a 'Search' button. Below this is a table with columns 'Customer Code', 'Name', and 'Active'. The first row shows 'BLACK', 'Black to Black', and 'Inactive'. Below the table, there is a link 'Mark Active : Users : Change Code : Credit Card' with a mouse cursor pointing at it. Below the link, it says '1 records. (1 page)' and a page number '1'. At the bottom, there is a form with fields for 'Customer Code', 'Name', 'Address', 'Post Code', 'Phone Number', and 'Debtor Status'. The 'Customer Code' field is filled with 'BLACK', 'Name' with 'Black to Black', 'Address' with '12 Tok-H Shopping Centre', 'Post Code' with '3142', and 'Phone Number' with '03 9826 9777'. The 'Debtor Status' field is empty. Below the form, it says 'Credit Card Payments for Orders : Active : Inactive'.



It is possible to have a setting that will automatically activate all customers. This should be used with caution as it will cause a large amount of data to be integrated. Please [consult with Commerce Vision](#) regarding turning this option on.

Related help

- [MS Active Directory Setup Guide](#)
- [Cost Centres](#)
- [Assign Multiple Customer Accounts to a User](#)
- [Add Cost Centre for Whole Order](#)
- [User Debtor Integration](#)
- [Azure Integration Dashboard](#)
- [User Budgets](#)
- [Set Up User Creation API](#)
- [Azure Operations](#)
- [Customer Client Projects](#)