# **Customer Maintenance**

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#### Overview

Almost all customer details are maintained in the ERP (e.g., PRONTO) and integrated to the website. However, there are some settings on the website which override some role and system based ones.

These are maintained by Administrators via the Customer Maintenance screen accessible in the CMS or when logged in on your website.

### Step-by-step guide

### **Update Customer Details**

**(1)** 

Any changes made to Delivery Addresses that are integrated from the ERP (e.g., PRONTO) will be overridden on the next integration.

To update a Customer's details:

Maintenance (/CustomerMaintenance.aspx)).

E-COMMERCE

↓ Users

→ Products & Categories

→ Campaigns & Promotions

→ Reporting

Q Search Analytics

→ CustomerMaintenance

→ CustomerMaintenance

1. In the CMS, navigate to Users Customer Maintenance (or while logged in on the website: Accounts Customer

2. Use the **Search** tool to find the customer you want to update.

CONTENT



Account Selection

3. Select the radio button for the Customer.



4. To view current details for the Customer, click the Customer Details tab.

Search		Customer Details	Catalogues	Cost Centres	Delivery Addresses	Audit	All Users	
Show Per	man	Customer Code : A Customer Name : A cently Inactive Users : (	A & A Cabinets					

5. Click Modify.

Search	Customer Details	Catalogues	Cost Centres	Delivery Addresses	Audit	All Users					
Modify_Change Customer Code											
Customer Code : AACAB											

- 6. Update customer settings and values as required.
- 7. To save changes, click OK.



### **Assign access to Custom Catalogues**

A custom catalogue is a set of products that have been grouped together for a specific purpose, customer, user, and are accessible only to subset of users. Custom Catalogues can be assigned at the user or customer level. When access to a custom catalogue is granted at the customer level, all users on that account will have access to that catalogue.



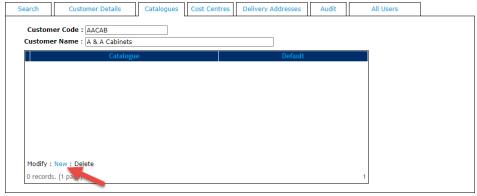
Approval, Order or Requisition limits for a catalogue must be set at the user level. See Updating a user's order limits.

To add custom catalogue access for a customer:

 In Customer Maintenance, find the Customer, then select the Catalogues tab. Any current catalogues for the customer will be listed.



2. Click New.



3. Select an available catalogue from the drop-down list.



- 4. If this catalogue is to default when a user in this customer account first logs in, tick the Default checkbox.
- 5. To save this access, click OK.

#### **Maintain Customer Cost Centres**

Cost centres are used in the context of a company's budget practices. They are maintained at the Customer level and shown on all orders for customers who have cost centres enabled. The cost centre is selected on each line item of an order before checkout.

Creating and assigning Cost Centre Codes to customers or users are now accessible in the CMS. Although you can still create and add cost centres through the old Customer Maintenance functionality, it is recommended that the Cost Centre settings via Feature Settings be used. See Cost Centres.

### **Maintain Customer Delivery Addresses**

A Customer may have several delivery addresses for a user to chose from when placing orders. These delivery addresses can be set up in the ERP (PRONTO) and integrated automatically. If the delivery addresses are *not* maintained in the ERP, they can be maintained online in **Delivery Addresses** in Customer Maintenance.

To add a new Delivery Address:

1. In Customer Maintenance (/CustomerMaintenance.aspx), find the customer, then click the Delivery Addresses tab.



- 2. Click New.
- 3. In Name, enter a name/description for the new delivery address.
- 4. In the Address and Post Code lines, enter the address.
- 5. In Instructions, enter any delivery instructions for this address.
- 6. To save the address, click **OK**.

#### **Maintain Customer Users**

In Customer Maintenance, the **All Users** tab displays all users attached to that customer account. The user's login ID, first name and surname are displayed, along with the approval limit, order limit and requisition limit. Click the **Edit** button to access the 'Advanced User Maintenance' page, where user details and settings specific to this Customer can be edited.



## 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
- Assign Multiple Customer Accounts to a User
- Set Default Customer Account for Users
- Invite ERP Customer User to Register Account