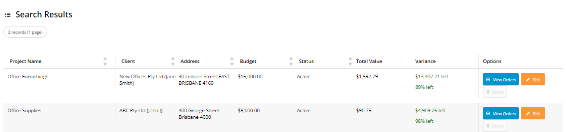
Customer Client Projects

__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.

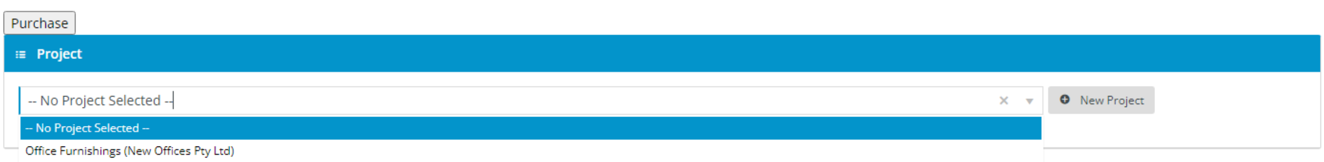
Use case: A Commerce Vision site sells office furniture and decor. Many of their customers buy products to fit out commercial premises. They use Customer Client Projects to manage and track orders for each fitout project. Each Project created includes the client's name, start/end dates, and a budget. 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.



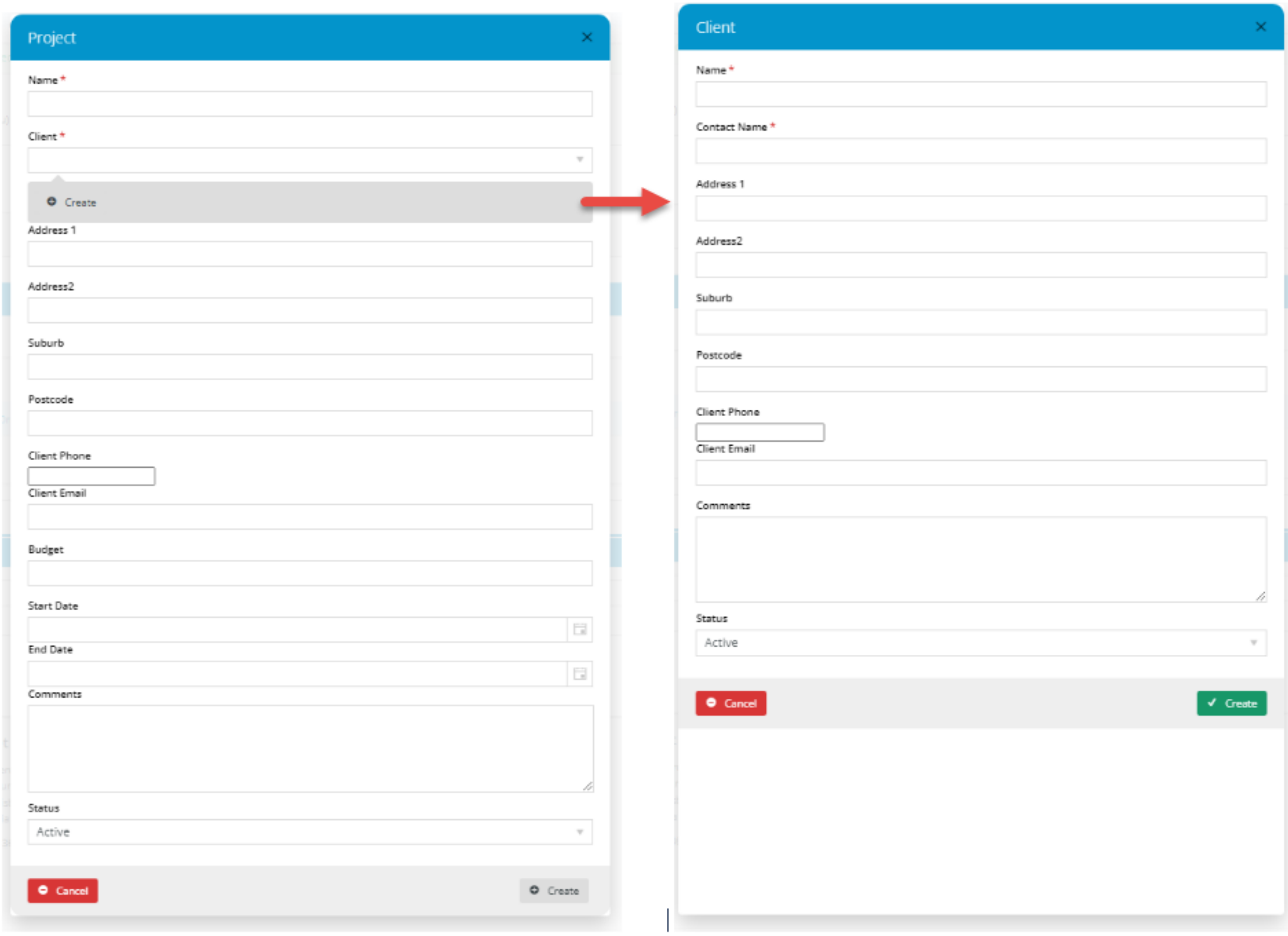
On this page:

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.



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



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 acccessed 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.*
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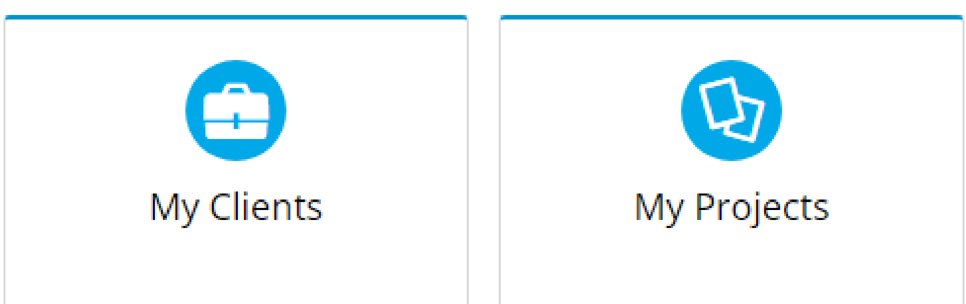
> 
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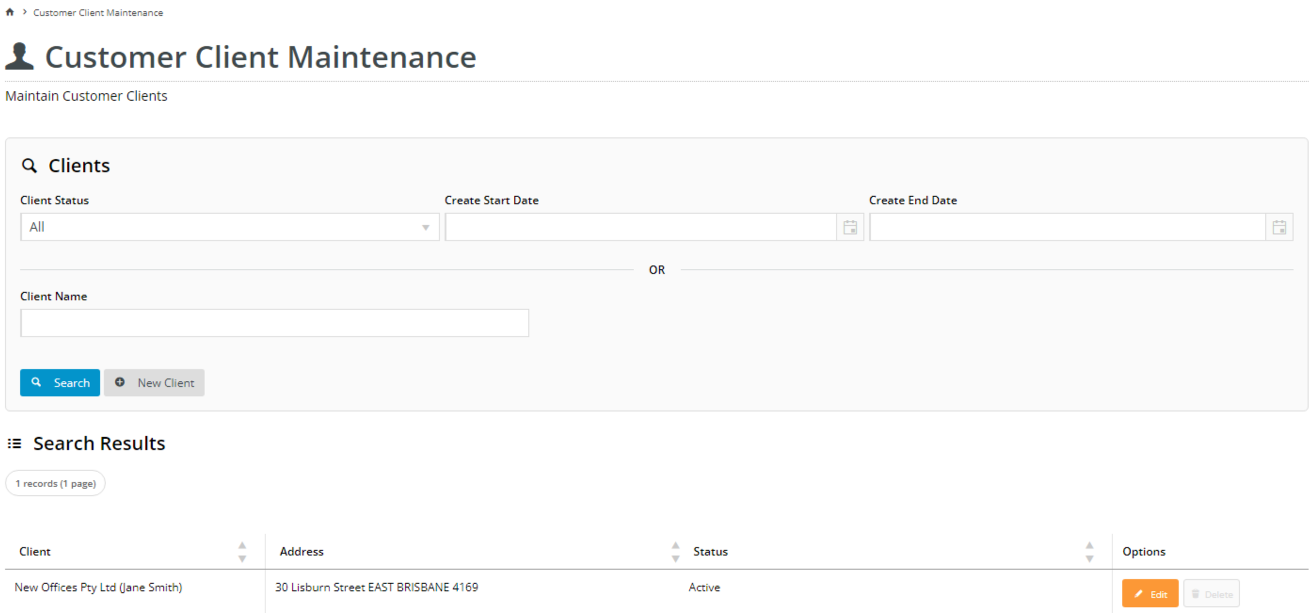
Maintain Customer Clients

This page lets your customers view and maintain their clients.

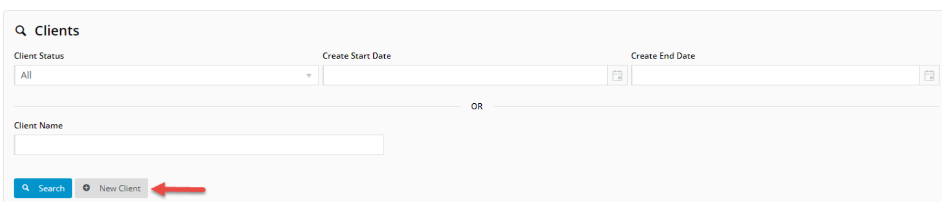


Create a Client

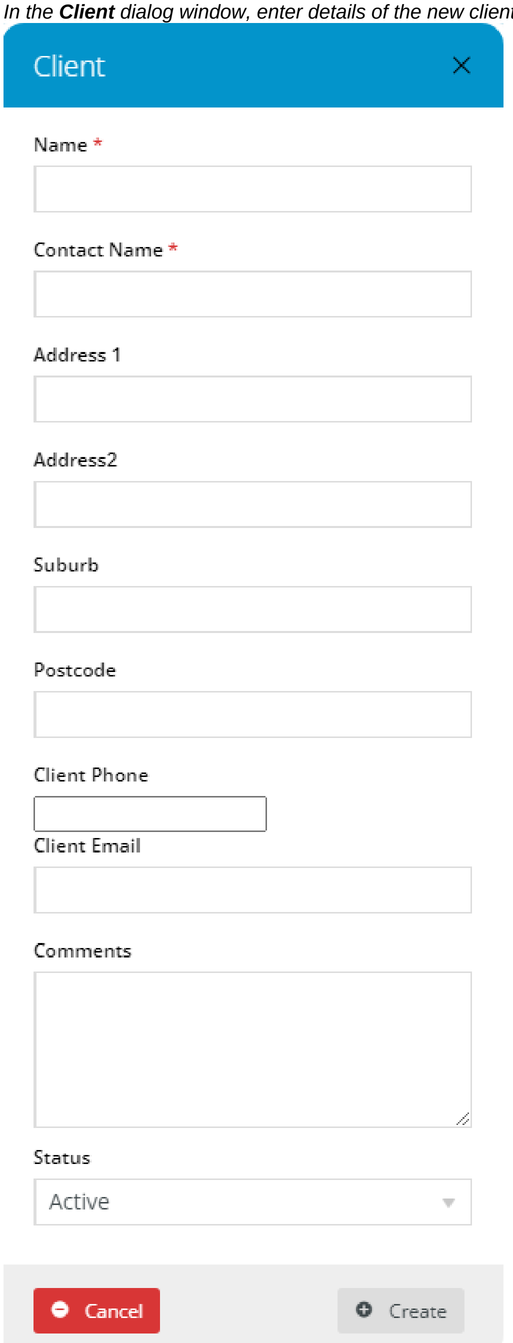
A new client is created in the Customer Client Maintenance page. It can also be created when a Project is being created in the Maintenance page or during Checkout.

To create a new client:

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



3. *In the **Client** dialog window, enter details of the new client.*

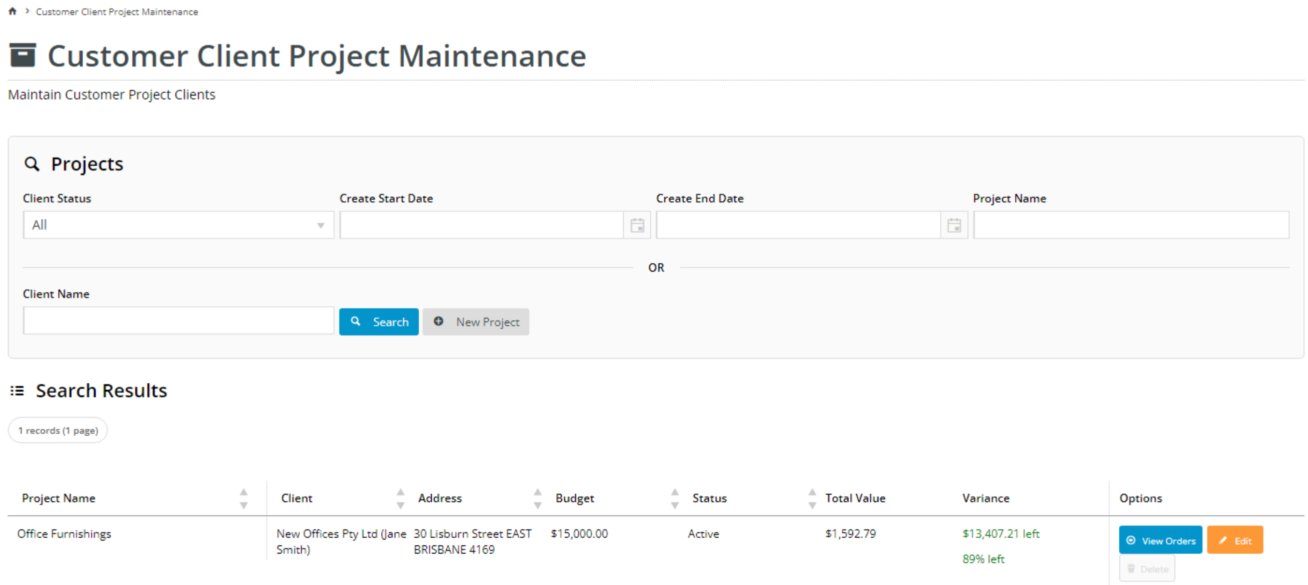


Name: *Client/company name.*
Contact Name: *Contact person's name.*
***Address** & contact fields: Client address and contact details.*
Comments: *notes relevant to the client.*
Status: *Active or Inactive. Inactive clients cannot be selected and linked to an project.*

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.

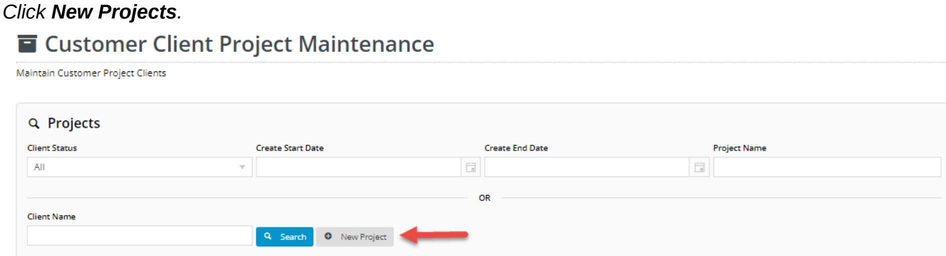


Create a Client Project

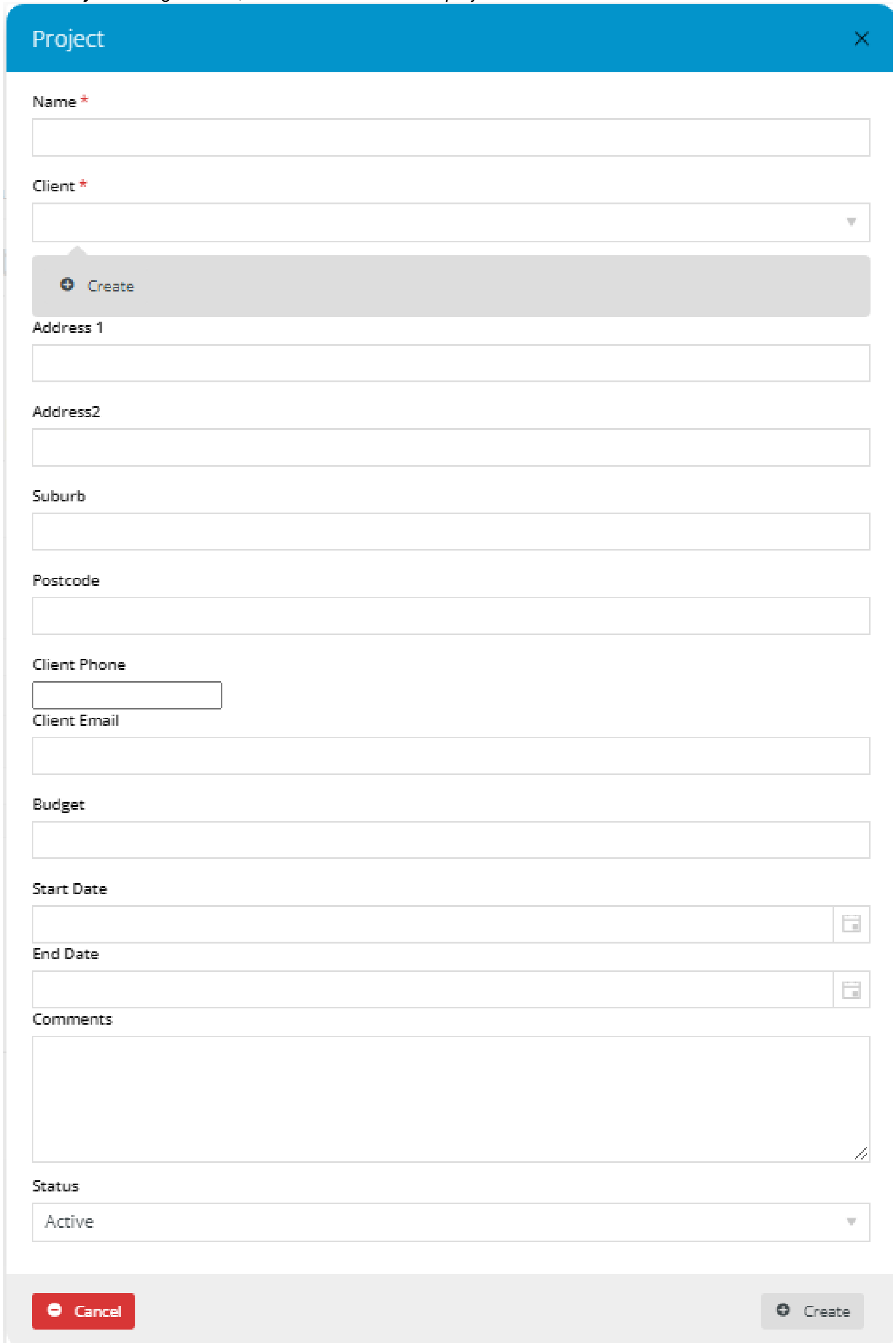
A new project is created in the Customer Client Project Maintenance page. It can also be created on the Checkout page to link the current order to a project.

To create a new client project:

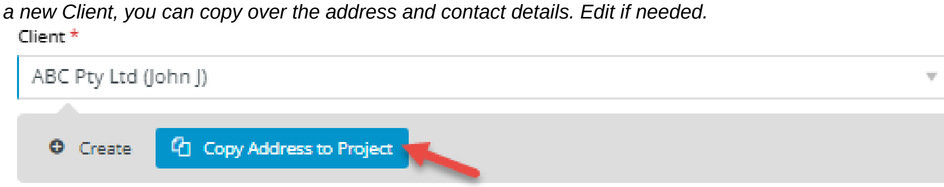
1. *Go to **Dashboard Menu My Projects**.*
2. *Click **New Projects**.*



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



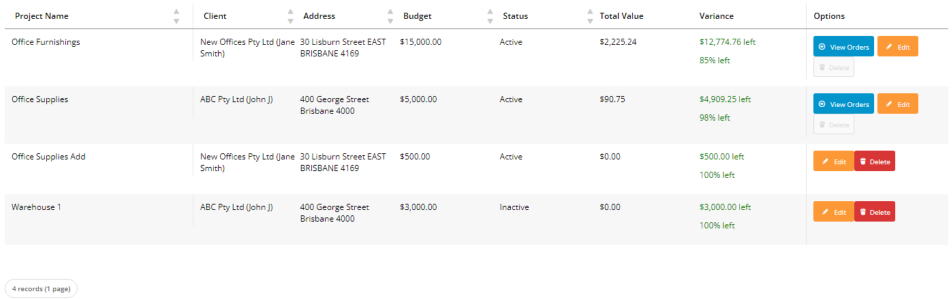
Name: *Project name.*
Client: *Select existing Client or for a new one, click **Create** (see Create a Client).*
***Address** & Contact fields: Enter the address and contact details. If an existing Client is used or you have just created a new Client, you can copy over the address and contact details. Edit if needed.*



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.*

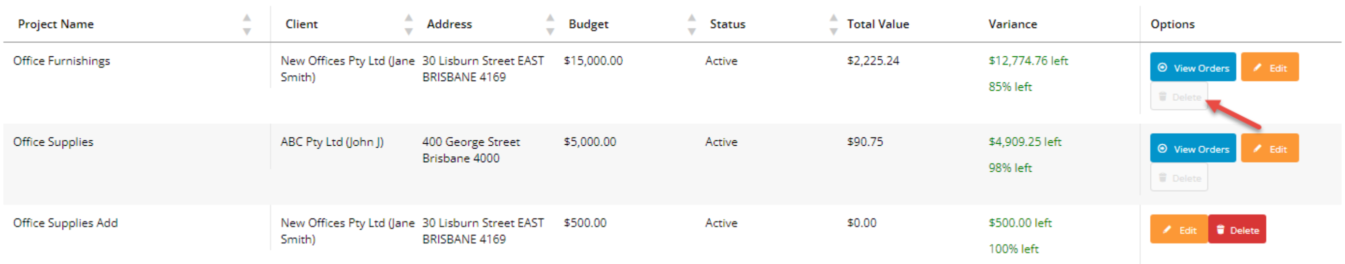
__Status:__ Active or Inactive. Inactive projects cannot be selected and linked to an order.

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



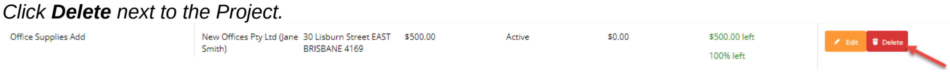
Delete a Project

A Project can only be deleted if it has no linked orders, i.e., Delete button is not disabled (greyed).

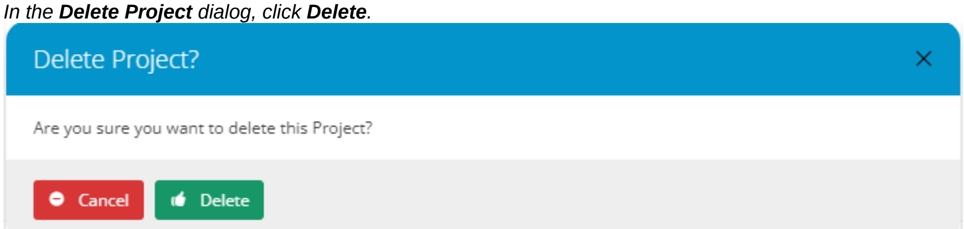


To delete a Project:

1. *Click __Delete__ next to the Project.*



2. *In the __Delete Project__ dialog, click __Delete__.*



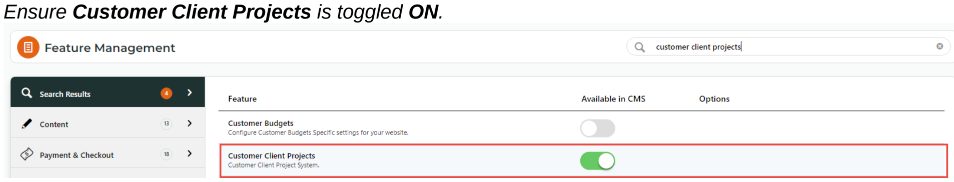
Admin tasks

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

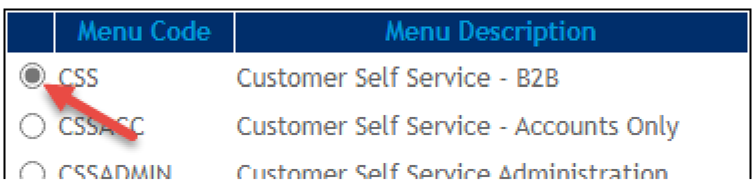
This task may have been done for your site.

For a Role to have access to this feature, add these two menu items to their Dashboard menu or as links on a page.

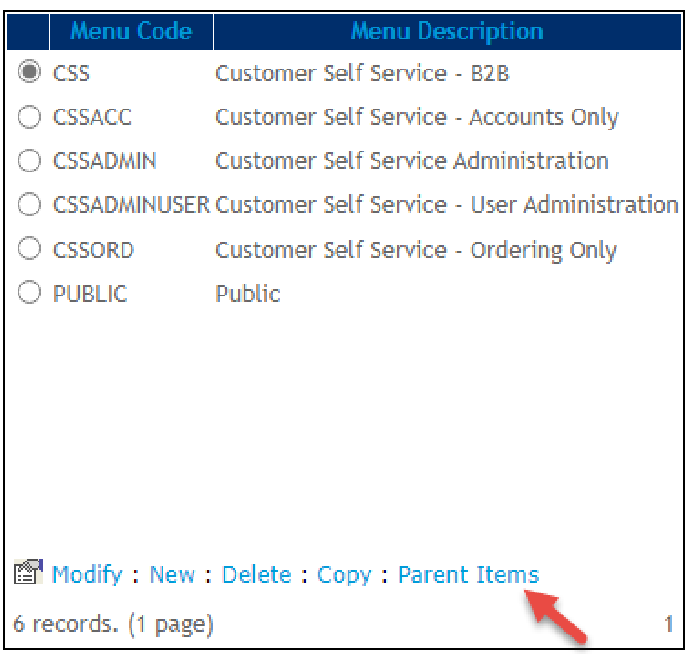
- Customer Client Project Maintenance page - **Menu Item Code:** 'THEME_BPDTHEME01_CustomerClientProjectMaintenance'; **Custom Page Code:** 'Customer Client Project Maintenance'
- Customer Client Maintenance page - **Menu Item Code**: 'THEME_BPDTHEME01_CustomerClientMaintenance'; **Custom Page Code:** '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).*

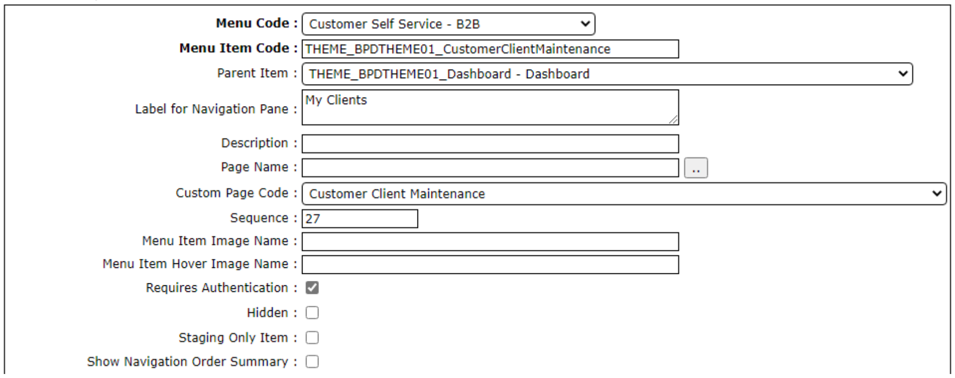


3. *Select **Parent Items**.*

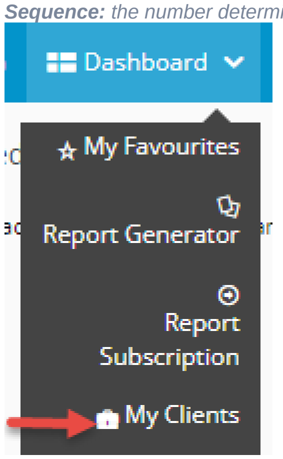


4. *Select **Menu Items**.*
5. *Select **New**.*

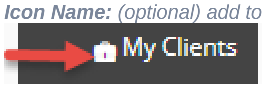
6. Edit the required fields:



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