

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	\$1,382.75	\$13,457.25 (96%)	View Details Edit
Office Supplies	ABC Pty Ltd (new offices)	401 George Street (new offices)	\$5,000.00	Active	\$90.75	\$4,909.25 (98%)	View Details Edit

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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 diagram illustrates the relationship between a Project and a Client. On the left is the 'Project' form, and on the right is the 'Client' form. A red arrow points from the 'Create' button in the Project form to the Client form, indicating that the Project is linked to the Client.

Project Form Fields:

- Name *
- Client *
- Create (button)
- Address 1
- Address 2
- Suburb
- Postcode
- Client Phone
- Client Email
- Budget
- Start Date
- End Date
- Comments
- Status (Active)
- Cancel (button)
- Create (button)

Client Form Fields:

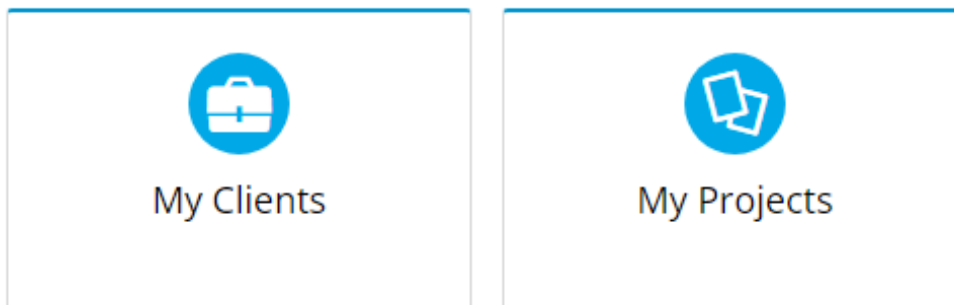
- Name *
- Contact Name *
- Address 1
- Address 2
- Suburb
- Postcode
- Client Phone
- Client Email
- Comments
- Status (Active)
- Cancel (button)
- Create (button)

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.

Customer Client Maintenance

Maintain Customer Clients

Q Clients

Client Status

Create Start Date

Create End Date

All

OR

Client Name

Search

New Client

Search Results

1 records (1 page)

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

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**.

Q Clients

Client Status

Create Start Date

Create End Date

All

OR

Client Name

Search

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.

Customer Client Project Maintenance

Maintain Customer Project Clients

Projects

Client Status

Create Start Date

Create End Date

Project Name

All

OR

Client Name

Search

New Project

Search Results

1 records (1 page)

Project Name	Client	Address	Budget	Status	Total Value	Variance	Options
Office Furnishings	New Offices Pty Ltd (Jane Smith)	30 Lisburn Street EAST BRISBANE 4169	\$15,000.00	Active	\$1,592.79	\$13,407.21 left 89% left	<div><div>View Orders</div><div>Edit</div><div>Delete</div></div>

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**.

Customer Client Project Maintenance

Maintain Customer Project Clients

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.

Project

Name *

Client *

+

 Create

Address 1

Address2

Suburb

Postcode

Client Phone

Client Email

Budget

Start Date

End Date

Comments

Status

Active

Cancel

+

 Create

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 BRISBANE 4169	\$15,000.00	Active	\$2,225.24	\$12,774.76 left 85% left	View Orders Edit Delete
Office Supplies	ABC Pty Ltd (John J)	400 George Street Brisbane 4000	\$5,000.00	Active	\$90.75	\$4,909.25 left 98% left	View Orders Edit Delete
Office Supplies Add	New Offices Pty Ltd (Jane Smith)	30 Lisburn Street EAST BRISBANE 4169	\$500.00	Active	\$0.00	\$500.00 left 100% left	Edit Delete
Warehouse 1	ABC Pty Ltd (John J)	400 George Street Brisbane 4000	\$3,000.00	Inactive	\$0.00	\$3,000.00 left 100% left	Edit Delete

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

To delete a Project:

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

Office Supplies Add	New Offices Pty Ltd (Jane Smith)	30 Lisburn Street EAST BRISBANE 4169	\$500.00	Active	\$0.00	\$500.00 left 100% left	Edit Delete
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2. In the **Delete Project** dialog, click **Delete**.

Delete Project?

Are you sure you want to delete this Project?

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

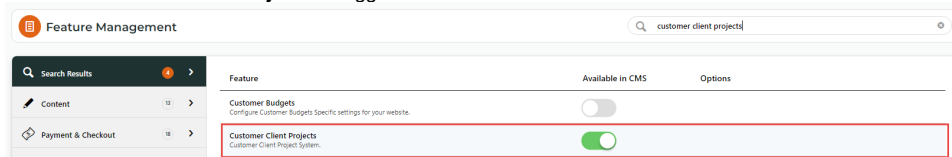
Admin tasks

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:

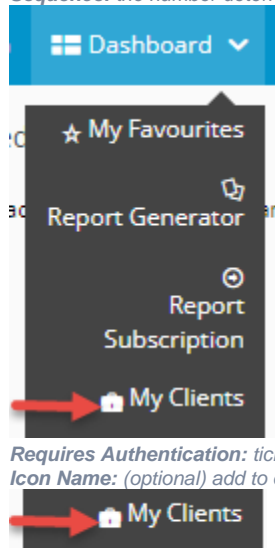
Menu Code :	Customer Self Service - B2B
Menu Item Code :	THEME_BPDTHEME01_CustomerClientMaintenance
Parent Item :	THEME_BPDTHEME01_Dashboard - Dashboard
Label for Navigation Pane :	My Clients
Description :	
Page Name :	
Custom Page Code :	Customer Client Maintenance
Sequence :	27
Menu Item Image Name :	
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](#)

