

Customer Maintenance

- [Overview](#)
- [Step-by-step guide](#)
 - [Update Customer Details](#)
 - [Assign access to Custom Catalogues](#)
 - [Maintain Customer Cost Centres](#)
 - [Maintain Customer Delivery Addresses](#)
 - [Maintain Customer Users](#)
- [Related help](#)

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.

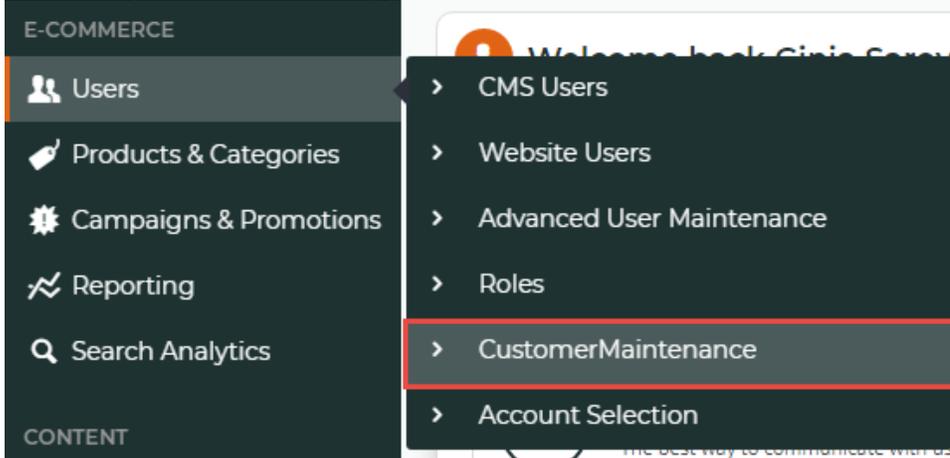
Step-by-step guide

Update Customer Details

! 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:

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



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

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Search For : Contains Starts With Equals

3. Select the radio button for the Customer.

The screenshot shows a search interface with tabs: Search, Customer Details, Catalogues, Cost Centres, Delivery Addresses, Audit, and All Users. The search criteria are 'aa' with options for 'Contains', 'Starts With' (selected), and 'Equals'. A search button is present. Below, it states 'Search found 1 records'. A table lists the results:

Customer Code	Name	Phone Number
<input type="radio"/> AACAB	A & A Cabinets	03 9456-9999

At the bottom, it says '72 records. (1 page)' and '1'.

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

The screenshot shows the 'Customer Details' tab selected. It displays the following information:

Customer Code : AACAB
Customer Name : A & A Cabinets
Show Permanently Inactive Users :

5. Click **Modify**.

The screenshot shows the 'Modify' button highlighted with a red arrow. Other buttons include 'Change Customer Code' and a help icon. The 'Customer Code' field contains 'AACAB'.

6. Update customer settings and values as required.

7. To save changes, click **OK**.

The screenshot shows the 'OK' button highlighted with a red arrow. Other buttons include 'Modify', 'Change Customer Code', and 'Cancel'. The 'Customer Code' field contains 'AACAB'.

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:

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

The screenshot shows the 'Catalogues' tab selected. It displays the following information:

Modify Change Customer Code Cancel OK
Customer Code : AACAB

2. Click **New**.

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Customer Code : AACAB
Customer Name : A & A Cabinets

Catalogue	Default
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Modify : New : Delete
0 records. (1 page) 1

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

Select a catalogue : Please Select ..
Default :

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 choose 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.

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Customer Code : AACAB
Customer Name : A & A Cabinets

Name	Address 1	Address 2	Address 3	Address 4	Post Code	Instructions
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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**.



Any changes made to Delivery Addresses that have been integrated from the ERP (PRONTO) will be overridden on the next integration.

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.

Search	Customer Details	Catalogues	Cost Centres	Delivery Addresses	Audit	All Users
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Customer Code : WEBCASUAL
Customer Name : WEB CASUAL ACCOUNT

Users Email Address	FirstName	Surname	Approval Limit	Order Limit	Requisition Limit	
cvsupport	Commerce Vision	Support User	\$99999.00	\$99999.00	\$0.00	Edit
katie.koss@commercevision.com.au	Katie	Koss				Edit
thomas@commercevision.com.au	Thomas	Fung	\$0.00	\$0.00	\$0.00	Edit
thomas102@commercevision.com.au	Thomas	Fung	\$0.00	\$0.00	\$0.00	Edit
thomas103@commercevision.com.au	Thomas	Fung	\$0.00	\$0.00	\$0.00	Edit

5 records. (1 page) 1

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](#)