

## 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.

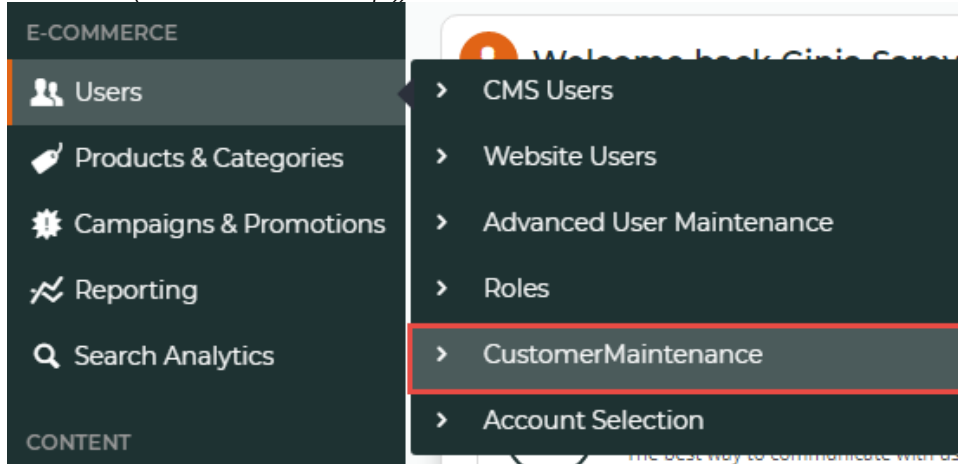
## Step-by-step guide

## Update Customer Details

 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.

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Search For : aa Contains Starts With Equals Search

Search found 1 records

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

72 records, (1 page) 1

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

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Customer Code : AACAB

Customer Name : A & A Cabinets

Show Permanently Inactive Users : ☐

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**.

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Modify Change Customer Code Cancel OK

Customer Code : 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.

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Modify Change Customer Code Cancel OK

Customer Code : AACAB

2. Click **New**.

Customer Code : AACAB  
Customer Name : A & A Cabinets

| Catalogue | Default |
|-----------|---------|
|           |         |

Modify : [New](#) : [Delete](#)  
0 records. (1 page) 1

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

Select a catalogue :

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 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.

Customer Code : AACAB  
Customer Name : A & A Cabinets

DeliveryAddressCustomerMaintDetails

| Name | Address 1 | Address 2 | Address 3 | Address 4 | Post Code | Instructions |
|------|-----------|-----------|-----------|-----------|-----------|--------------|
|      |           |           |           |           |           |              |

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 |
|------------------------------------|------------------|--------------|----------------|--------------------|-------------------|-----------|
| 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](#)