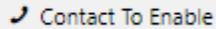


# Cost Centres

Is this feature disabled?

 Contact To Enable

*This feature needs to be switched on for your site by Commerce Vision.*

**On this page:**

- [Overview](#)
- [Configure Cost Centres settings](#)
- [Create a customer cost centre](#)
- [Bulk Import/Export Cost Centres](#)
  - [Import Cost Centres](#)
  - [Export Cost Centres](#)
- [Assign Cost Centre to a Customer User](#)
- [Bulk Import/Export User Cost Centres](#)
  - [Import User Cost Centres](#)
  - [Export Customer User Cost Centres](#)
- [Maintain Online Validation Rules](#)
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## Overview

Cost centres are used on sites with B2B users within the context of an organisation's budget practices. You can set up cost centres so that a purchaser from this organisation enters one cost centre for the [whole order](#) (for sites on 4.37+) or one for each order line. Consult Commerce Vision for integration of cost centre codes from the ERP. This article focuses on setting up order line cost centres.

**Remember:** Cost centres are a function of organisations. So when setting up cost centres feature, keep in mind the setup differs from customer account (customer code) to customer account. Once cost centres have been set up against a Customer code, there is an option to assign one or more of them against individual Customer's users.

## Step-by-Step Guide

### Cost Centre maintenance in the CMS

Although the Cost Centre maintenance page for website administrators is still available through Customer Maintenance ([/CustomerMaintenance.aspx](#)) on your website, cost centres can now be maintained as a CMS Feature Settings.

## Configure Cost Centres settings

### Cost Centres & Using Overrides

Each toggle turns on the setting on the whole site. It is unlikely all your business customers use cost centres or have the same cost centre configurations. It is advisable to leave each setting's toggle at OFF and use the [Overrides](#) feature to set up individual Cost Centres for each customer account that uses them. You can also use Overrides to set Cost Centres to particular Roles and/or users.

Example: leave Use Cost Centres toggle OFF and click Overrides to set use of cost centres against specific customer accounts.



**IMPORTANT** - If you have customers that use one cost centre per whole order as well as some that need them added at each order line, you must use the Overrides feature. A customer cannot use whole order and order line costs centres at the same time. Learn more: [Order header cost centre](#)

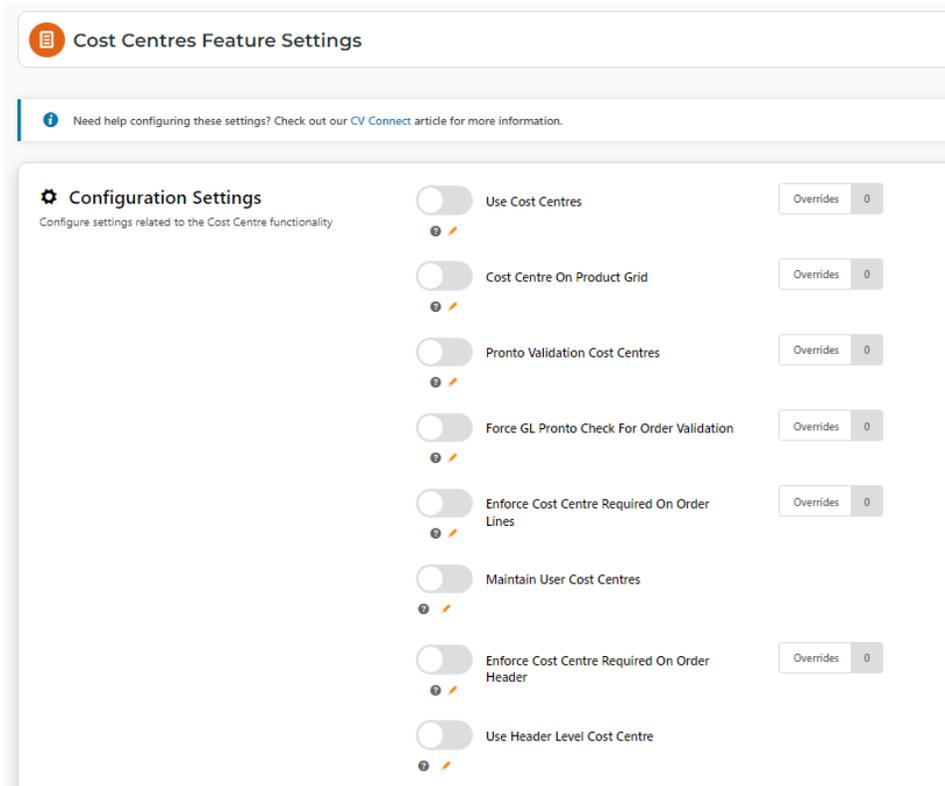
To enable Cost Centres:

1. Go to **Settings Settings Feature Management Products and Categories**. If the **Cost Centres** feature is not enabled, contact Commerce Vision.

2. Click **Configure**.



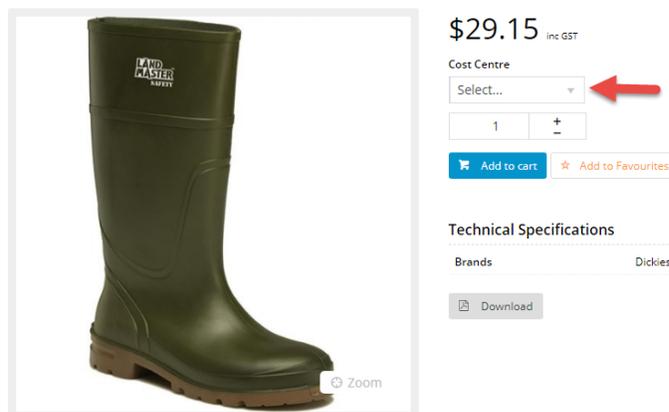
3. In the **Cost Centres Feature Settings** page, configure the settings as required.



- a. **Use Cost Centres:** enable **Use Cost Centres** as a default for all customers on your website. Use Overrides to enable Cost Centres only for specific Customers.
- b. **Cost Centre On Product Grid:** displays Cost Centre field in the product detail page to allow user to enter a cost centre. Use Overrides to display only for specific Customers.

## Dickies Wellington Safety Boots

Product Code: CV150

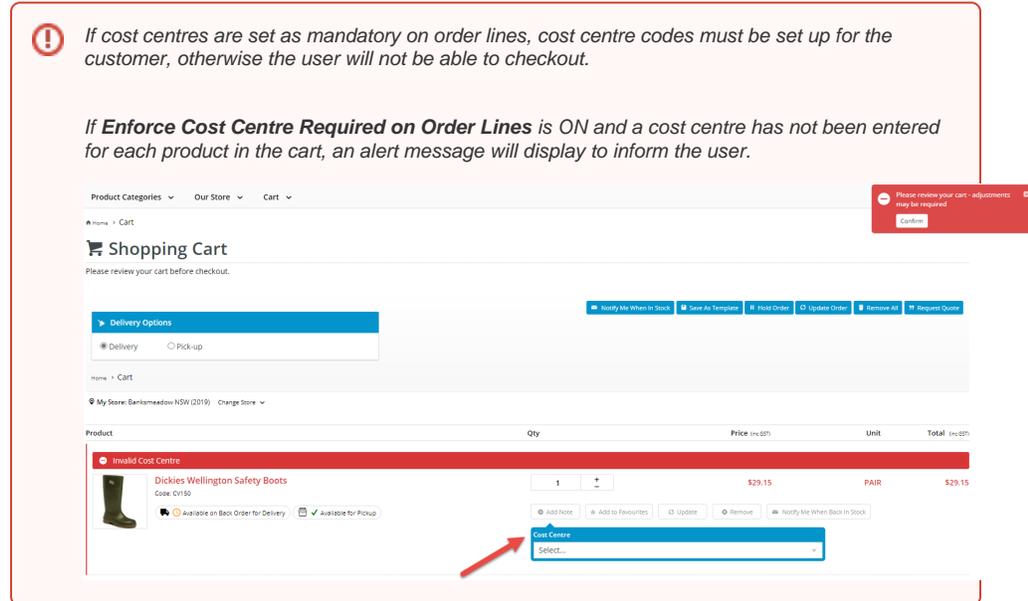


- c. **Pronto Validation Cost Centres:** (for Pronto users only) - use a validation rule instead of entering specific cost centre codes. Use Overrides to enter a validation rule per customer account. **NOTE** - In the cart, the system will check whether the user has entered a valid cost centre code based on the validation rule.

- d. **Force GL Pronto Check for Order Validation:** (for Pronto users only) - forces a validation error on checkout when the user is not in a role that allows them to enter cost centres and there are cost centre validation errors. Use Override to set against a customer.
- e. **Enforce Cost Centre Required on Order Lines:** force users to select a cost centre per order line during checkout. Use Overrides to enable against specific customers.

 If cost centres are set as mandatory on order lines, cost centre codes must be set up for the customer, otherwise the user will not be able to checkout.

If **Enforce Cost Centre Required on Order Lines** is ON and a cost centre has not been entered for each product in the cart, an alert message will display to inform the user.



The screenshot shows a shopping cart page with a red warning banner at the top. The banner contains the text: "Please review your cart - adjustments may be required" and a "Confirm" button. Below the banner, the cart items are listed. One item, "Dickies Wellington Safety Boots", has a red banner that says "Invalid Cost Centre". A dropdown menu is open for this item, showing "Cost Centre" and "Select...". A red arrow points to the dropdown menu.

- f. **Maintain User Cost Centres:** if you're creating cost centres online, enable this toggle. It allows you to create customer cost centres and also assign them to particular customer users. When enabled, the buttons: **Maintain Customer Cost Centres** and **Maintain User Cost Centres** are displayed. **NOTE** - User level cost centre maintenance will also become available on the user's Edit User's page from CMS Website Users.

 **Maintain User Cost Centres**

 **Maintain Customer Cost Centres**

 **Maintain User Cost Centres**

4. When your settings have been configured, click **Save**.

## Create a customer cost centre

**NOTE** - A Cost Centre is always linked to a Customer account but once added, a cost centre can be assigned to individual Customer users.

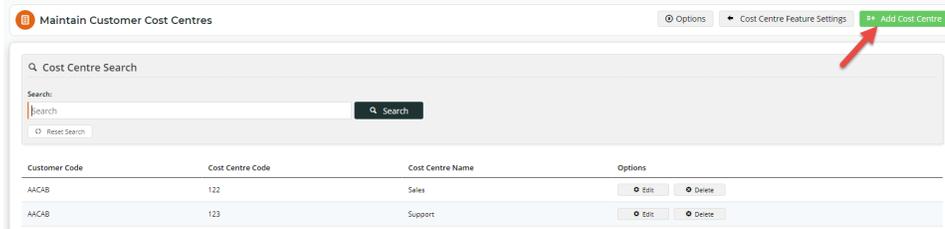
To create a cost centre for a customer:

1. In the **Cost Centres Feature Settings** screen, make sure the **Maintain User Cost Centres** toggle is ON.

 **Maintain User Cost Centres**

2. Click **Maintain Customer Cost Centres**.

3. In the **Maintain Customer Cost Centres** page, any existing cost centres are listed. Click **Add Cost Centre**.



4. In **Customer**, select the customer code for this cost centre. **NOTE** - Make sure you're entering the Customer Code, not the Bill To Code.
5. In **Cost Centre Code**, enter a code for the cost centre.
6. In **Cost Centre Name**, enter a name/description for the cost centre. This will be displayed to the user in the 'Select cost centre' dropdown list during the order process.
7. Click **Save**, or **Save & Add Another** if you want to add another new cost centre.

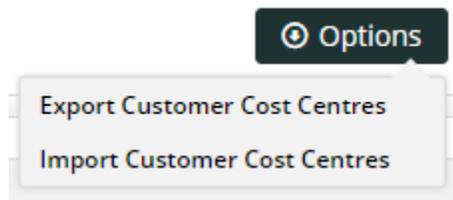
## Bulk Import/Export Cost Centres

Instead of maintaining cost centres manually, you can also bulk import/export them.

### Import Cost Centres

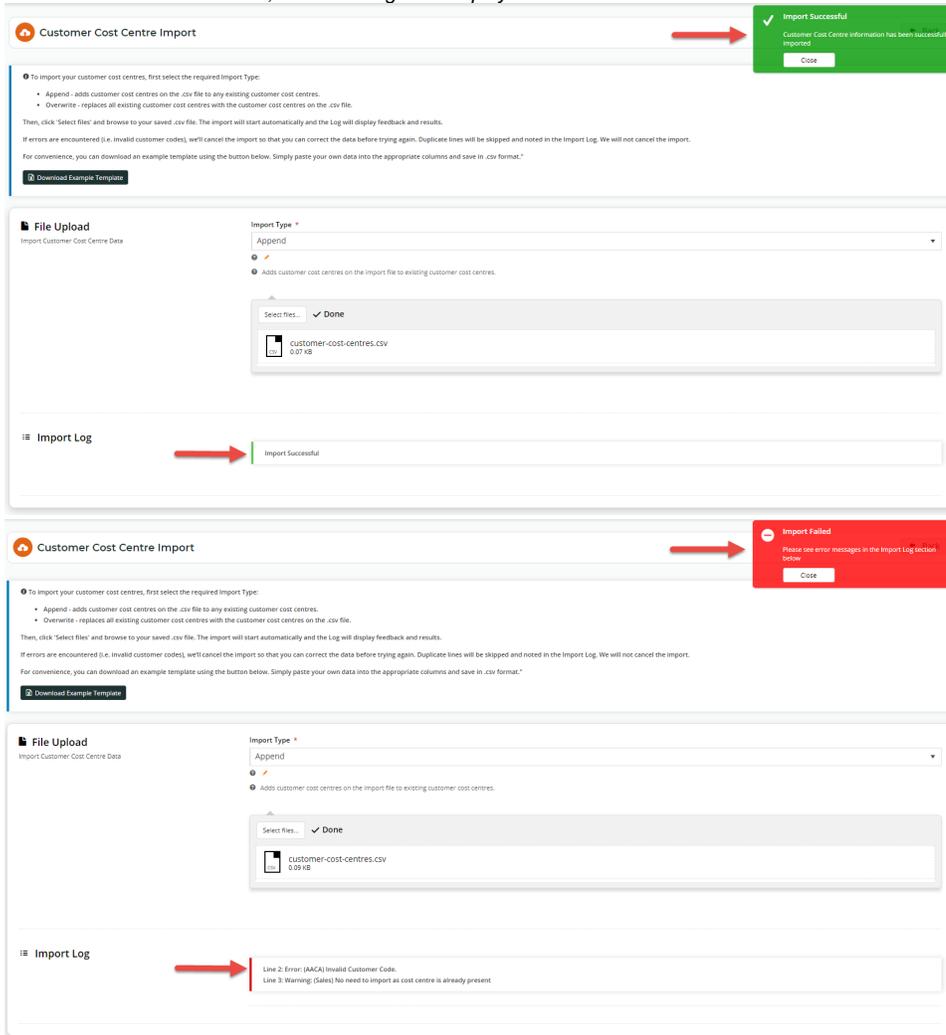
**IMPORTANT** - You should have the prepared .csv file ready to import before starting. If you need the template, you can download it in the Customer Cost Centre Import page.

1. In the **Maintain Customer Cost Centres** page, hover over the **Options** button and select **Import Customer Cost Centres**.



2. Select the **Import Type** to use. **TIP** - **Append** adds new customer cost centres to the list of existing cost centres. Any duplicates will not be uploaded. Use **Overwrite** to add new customer cost centres and replace all existing cost centres.
3. Click **Select Files** and upload your cost centre .csv file. The import will automatically begin.

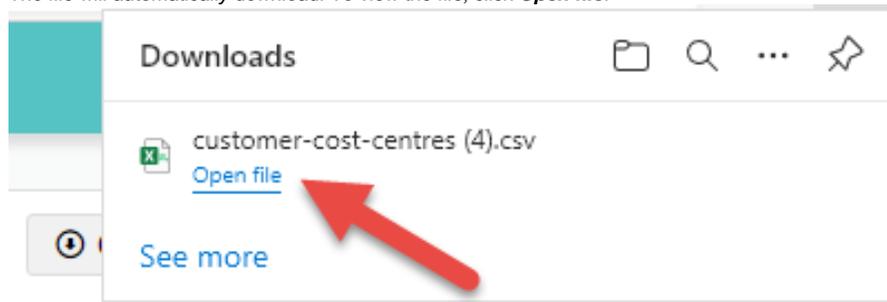
4. If successful, the following messages will display on the screen. Duplicate cost centres will not be added but they will be mentioned. If unsuccessful, a fail message will display.



## Export Cost Centres

The Export function lets you download a .csv file containing all cost centres in use.

1. In the **Maintain Customer Cost Centres** screen, hover over the **Options** button and select **Export Customer Cost Centres**.
2. The file will automatically download. To view the file, click **Open file**.



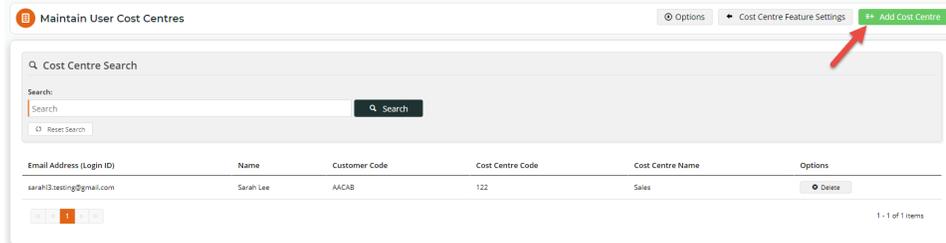
## Assign Cost Centre to a Customer User



When Maintain User Cost Centres is enabled, you can also access this function via each user's [Edit page](#).

To create a cost centre at the customer use level:

1. In the **Cost Centres Feature Settings** screen, ensure the **Maintain User Cost Centres** toggle is **ON**.
2. Click **Maintain User Cost Centres**.
3. In the **Maintain User Cost Centres** screen, any existing User Customer cost centre assignments are listed. Click **Add Cost Centre**.



4. In **User**, select the user.
5. Depending on the User, in **Customer**, linked customer accounts are displayed. Select the customer.
6. In **Cost Centre**, from the dropdown list, select a code. **NOTE** - if there are no cost centres, you cannot proceed with assigning a cost centre to this user.
7. Click **Save**, or **Save & Add Another** if you want to assign another cost centre to a user.

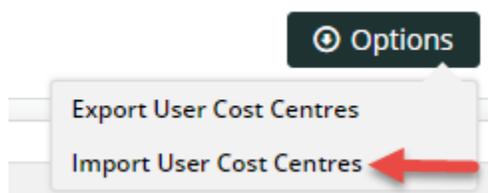
## Bulk Import/Export User Cost Centres

Instead of maintaining cost centres for users manually, you can also bulk import/export them.

### Import User Cost Centres

**IMPORTANT** - You should have the prepared csv file ready to import before beginning. You can download a template in the User Cost Centre Import page.

1. In the **User Cost Centre Import** screen, hover over the **Options** button and select **Import Customer Cost Centres**.

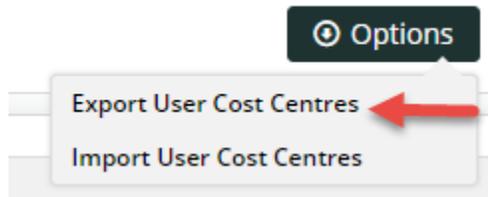


2. Select the **Import Type** to use. **TIP** - Use **Append** adds new customer user cost centres to the list of existing ones. Any duplicates will not be uploaded. Use **Overwrite** to add new customer user cost centres and replace all existing cost centres.
3. Click **Select Files** and upload your cost centre .csv file. The import will automatically begin.

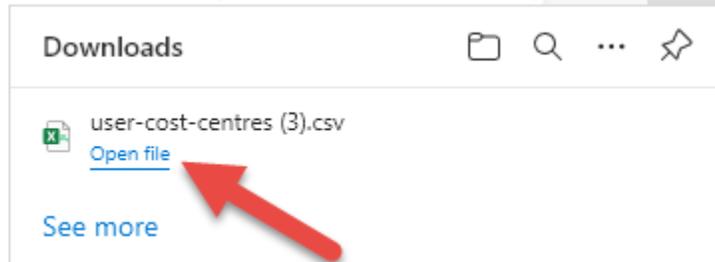
### Export Customer User Cost Centres

The Export function lets you download a .csv file containing all customer users and their cost centres.

1. In the **User Cost Centres** screen, hover over the **Options** button and select **Import User Cost Centres**.



2. The file will automatically download. To view the file, click **Open file**.



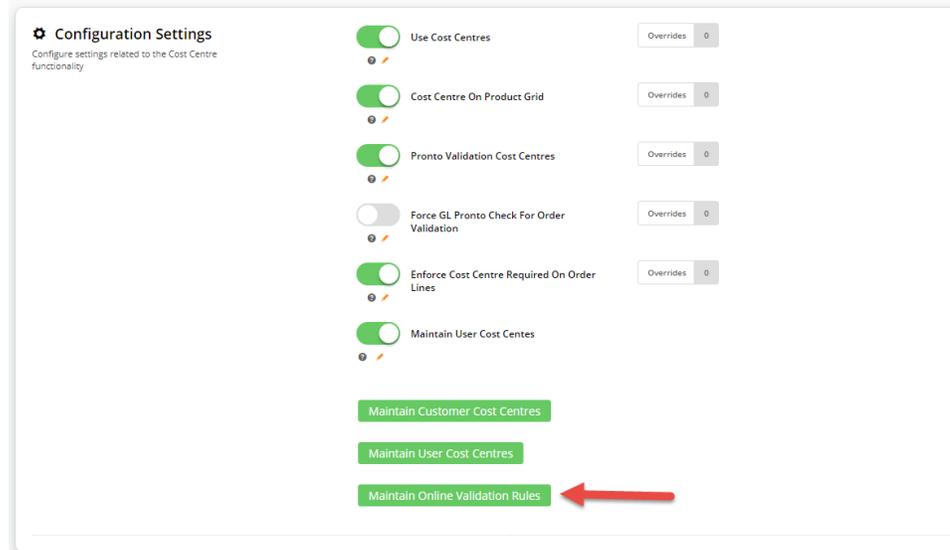
## Maintain Online Validation Rules

This function allows you to add an online cost centre validation rule against a customer account. When a validation rule is set against a customer account, the purchaser can enter a cost centre code instead of selecting an added cost centre from a dropdown list. The code they enter must conform to the validation rule. **NOTE** - the **Pronto Validation Cost Centres** toggle must be enabled for validation checks to be applied on the website.

**i NOTE** - There can only be one active validation rule against a customer at any one time. The exception is Bill To level validation rules, where a customer level rule will override any Bill To ones.

To add a validation rule:

1. In the **Cost Centres Feature Settings** screen, click the **Maintain Online Validation Rules**.



2. Click **Add New Validation Rule**.

3. In the **Add New Validation Rule** page, enter the values for the validation rule.

The screenshot shows the 'Add New Validation Rule' interface. It features a header with 'Add New Validation Rule' and navigation buttons for 'Options', 'Back', 'Save', and 'Save & Exit'. The main content area is titled 'Validation Rule Settings' and includes a sub-section 'Validation Rule related values'. This section contains several configuration options: a text field for 'Description', a dropdown menu for 'Customer', and three toggle switches for 'Is Enabled', 'Is Bill To', and 'Copy Previous Value'. Below these is a text input field for 'Help Text'. At the bottom of the page, there is a 'Segments' section with the sub-header 'Manage the segments for this Validation Rule' and an 'Add Segment' button.

- a. **Description:** a suitable description for this rule.
- b. **Customer:** the customer code this rule applies to.
- c. **Is Enabled:** make this rule active on your website.
- d. **Is Bill To:** toggle ON if this rule is for a Bill To code and will apply for all customer codes with that Bill To.
- e. **Copy Previous Value:** automatically copy the cost centre value from the previous order line in the order if no cost centre is selected.
- f. **Help Text:** enter a useful tip about how the cost centre code must be entered, e.g., 'Code must follow this pattern: AB-123-12'. This displays to the user when they are entering the cost centre code.

## Construct the validation rule

### Add validation rule segments

Validation rule segments allow you to define how the cost centre code must be entered for each customer code. For example, a code like '12345' can be created as a one segment rule for validation. But if a business has more complex codes such as 'AB34567' or 'AB-345-67', it might be better to create a two or more segment rule so that each part can be validated separately. A segment rule can be set by the number of characters, value type and entry type. **NOTE** - So that the code can be correctly validated, only the last segment can have different values for the minimum and maximum number of characters.

To add a segment:

1. While in the validation rule, click the **Add Segment** button.

2. In the **Add Segment** window, enter values for the segment.

**Add Segment**

Description \*

Minimum number of characters \*

Maximum number of characters \*

Default Value Type \*

Type \*

Numeric Only

Cancel Apply

- a. **Description:** enter a suitable description for this segment, e.g., Seg1.
- b. **Minimum number of characters:** enter the minimum number of characters for this segment.
- c. **Maximum number of characters:** enter the maximum number of characters for this segment.
- d. **Default Value Type:** select **None**: no default value; **Fixed value**: default value; **List**: user selects from list.
- e. **Type:** select the value entry type. **User Entry**: allow user to enter; **Fixed Value**: enter a **Default Value** that must be used in this segment; **List**: display a list for the user to select a value.
- f. **Numeric Only:** toggle ON if only numerical values are allowed to be entered in this segment.

3. To save this segment, click **Apply**.

4. Define more segments for this code if required.

## Configure related widgets

For the cost centre entry fields and details to display for the purchaser on your website, you can add and/or configure the following widgets depending on where and when you want the order line Cost Centre fields to display.

- Order Lines widget - enable Show Cost Centre Field.
- Product Detail widget - enable Show Cost Centre Field. For custom placement, see: Product Cost Centre widget.
- Product Cost Centre widget - add and configure to display the Cost Centre label and input field on the product detail page. This option is used to place the Cost Centre field where you want it on the product detail page instead of the default placement by the [Product Purchase Details widget](#).
- Order Line Cost Centre widget - add and configure to display Cost Centre entry field (only for use with Role-based cost centre enabled)
- Product List Cost Centre widget - add and configure to display the cost centre field in the zoned list view when products are shown in a list page (only for use with Role-based cost centre enabled)
- Quick Order Lines widget - enable Enable Cost Centre to display Cost Centre entry field on the Quick Order form.

## Related Resources

- [Cost Centres](#)
- [Force User to Select Customer Upon Login](#)
- [Assign Multiple Customer Accounts to a User](#)
- [Add Cost Centre for Whole Order](#)
- [User Budgets](#)

## Related widgets

- [Header Level Cost Centre Widget](#)
  - [Order Template Cost Centre Widget](#)
  - [Order Line Cost Centre Widget](#)
  - [Product List Cost Centre Widget](#)
  - [Product Cost Centre Widget](#)
- 
- [Order Lines Widget](#)
  - [Quick Order Form Lines Widget](#)