# **Web Link** Help File:
## Create Customer Accounts

## Abstract

> ➤ This help file will illustrate how to create a new customer account.
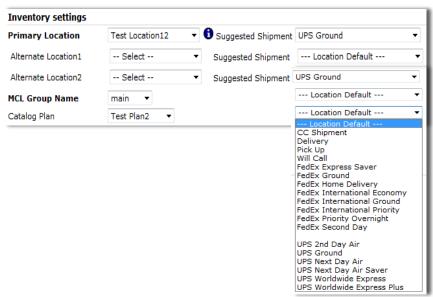
## Procedure

1. Navigate to "Customer Management" and then select "Add a Customer Account" from the drop down menu. The Add Customer page contains several user definable fields and drop down menu boxes that are used to establish the new customer settings, inventory settings, location information, web settings, and designate a shop management system which is an add-on integration.
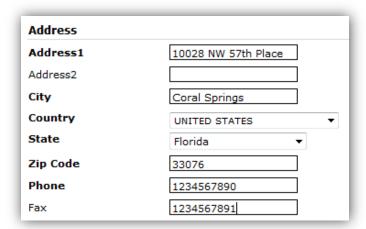
2. The "Customer Settings" section has three user fields and a drop down list box:
   - Customer #: Assign a customer number for the new customer account
   - Enter the Gateway ID for the customer: Gateway or Connect ID is a unique id used to identify each customer using the AConneX gateway. Please contact the Epicor Advice Line at 1-800-678-7423 for help in locating this.
   - Default Salesman: From the drop down list box, select the salesman setting. Select the default Salesman if you have not set up sales reps. See Add a Salesman to add to this area and assign an account to a sales rep.
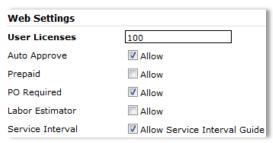
| Customer settings | |
| --- | --- |
| Customer # | 64152 |
| Gateway ID | 64152 |
| Company Name | Parkville Automotive |
| Default Salesman | Default Salesman ▼ |

3. "Inventory Settings" section allows the administrator to assign location, shipping information and catalog plans to the customer:
   - Primary/Alternate Location: one or more warehouse locations can be assigned to the customer. These locations will fulfill all orders placed by the customer.
   - Suggested Shipment: For each location you can select a shipment method to default to upon checkout. This can be changed by the user at any time and is only a suggested shipment method

| Inventory settings | | | | |
| --- | --- | --- | --- | --- |
| Primary Location | Test Location12 ▼ | ⓘ Suggested Shipment | UPS Ground | ▼ |
| Alternate Location1 | -- Select -- ▼ | Suggested Shipment | --- Location Default --- | ▼ |
| Alternate Location2 | -- Select -- ▼ | Suggested Shipment | UPS Ground | ▼ |
| | | | --- Location Default --- | ▼ |
| MCL Group Name | main ▼ | | --- Location Default --- | ▼ |
| Catalog Plan | Test Plan2 ▼ | | --- Location Default --- | |

CC Shipment
Delivery
Pick Up
Will Call
FedEx Express Saver
FedEx Ground
FedEx Home Delivery
FedEx International Economy
FedEx International Ground
FedEx International Priority
FedEx Priority Overnight
FedEx Second Day

UPS 2nd Day Air
UPS Ground
UPS Next Day Air
UPS Next Day Air Saver
UPS Worldwide Express
UPS Worldwide Express Plus

   - MCL Group Name: from the drop down menu boxes, select the catalog group name as setup in the Catalog Management menu area.
   - Catalog Plan: Select the Catalog Plan from the dropdown box as setup in the Catalog Management menu area. Note: Depending on your website's configuration this may not be applicable.

4. The "Address" section allows the administrator to enter location information for the customer. *All phone #'s and faxes are to be entered with no spaces or dashes. The systems will add them once saved.*

5.  Various web related settings can be configured in the "Web Settings" section:

    - User Licenses: Enter the maximum number of users that may be registered to the account
    - Auto Approve: This setting allows orders to be placed automatically to the back end system.  If this is unchecked, the order for this customer will be held on the site in the Approve Orders tool found under the Order Status section of the left menu bar. From there the administrator can release them manually.
    - Prepaid: Select this box if customer is to be charged using credit card or PayPal through WebWare exclusively (*You must have a PayPal or an Auth.net and merchant account setup to use this feature*.) Wholesale customers who are invoiced for payment should leave this option unchecked.
    - PO Required: Select this box to require the customer to provide a purchase order (PO) number prior to purchase.
    - Labor Estimator: check this box to include labor estimates with order summary (*This is an add-on and may not be shown on your site initially. Please contact us if you are interested*).
    - Service Interval: provide a guide that alerts customers to suggested routine maintenance services (*This is an add-on and may not be shown on your site initially. Please contact us if you are interested*).



6.  "Shop Management" allows the administrator to integrate the customer's shop management system with WebWare (*This is an add-on and may not be shown on your site initially. Please contact us if you are interested*).

    - Select the appropriate system check box.

7. "Create a Login" by selecting the check box (optional). Fill in the fields for name and email. Create a login username and password. Users registered from this page are automatically assigned to the Customer Administrator role/security plan by default.

8. Customer Administrator user role/security plan by default. This section is optional and it is not required that a login be created from this screen. (*Please note that while we suggest you use a minimum of 6 characters for improved security this is not mandatory*).



9. *After all information on the Add Customer screen has been entered, click on the "Save" button at the bottom of the page. Click on the "Cancel" button to discard all entries*. *(If there are any errors a message will display at the top of the page. Please correct and save again*).