

# Web Link Help File: View and Edit Customer Accounts

## Abstract

- This help file will demonstrate the process for viewing and editing existing customer accounts.

## Procedure

- 1) Sign into the site as website administrator user.
- 2) Select "View Customer Accounts" from the Customer Account Management menu. (fig. 1)



fig. 1

- 3) The customer account list can be refined by searching by customer number, name, city, assigned default store location, default salesman, or the assigned MCL group name. In this example the search is conducted by entering a customer number. All customer lists can be exported to an Excel format spreadsheet file or printed. (fig. 2)

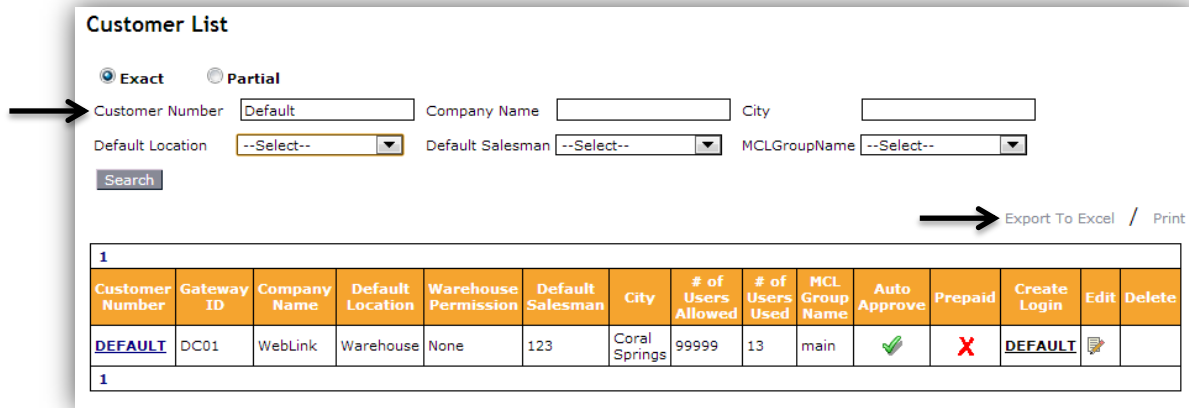


fig.2

4) Clicking on the "Edit" link opens the Edit Customer page. (fig. 3)

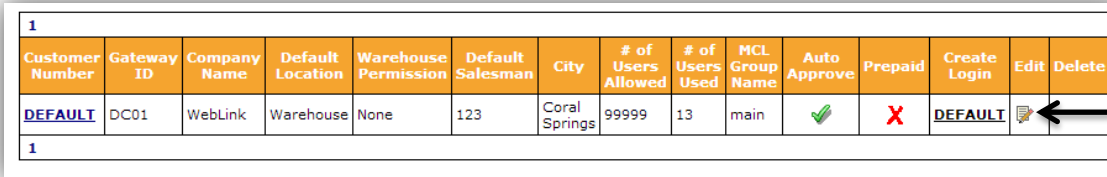


fig.3

5) The "Customer Settings" section of the Edit Customer page has three user fields and a drop down list box. (fig. 4)

- 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.

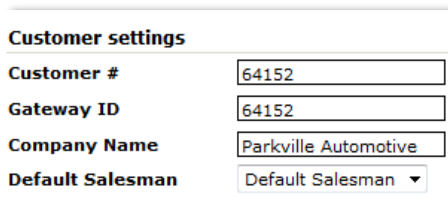


fig.4

6) "Inventory Settings" section allows the administrator to assign location, shipping information and catalog plans to the customer. (fig. 5)

- 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

MCL Group Name: main

Catalog Plan: Test Plan2

--- Location Default ---

--- Location Default ---

--- 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

fig.5

- 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.

7) The "Address" section allows the administrator to enter location information for the customer. (fig. 6) *All phone #'s and faxes are to be entered with no spaces or dashes. The systems will add them once saved.*

**Address**

Address1: 10028 NW 57th Place

Address2:

City: Coral Springs

Country: UNITED STATES

State: Florida

Zip Code: 33076

Phone: 1234567890

Fax: 1234567891

fig.6

- 8) Various web related settings can be configured in the "Web Settings" section. (fig. 7)
- 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*).

Web Settings	
User Licenses	<input type="text" value="100"/>
Auto Approve	<input checked="" type="checkbox"/> Allow
Prepaid	<input type="checkbox"/> Allow
PO Required	<input checked="" type="checkbox"/> Allow
Labor Estimator	<input type="checkbox"/> Allow
Service Interval	<input checked="" type="checkbox"/> Allow Service Interval Guide

fig.7

9) "Shop Management" allows the administrator to integrate the customer's shop management system with WebWare. (fig. 8) (*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.

Shop Management System	
<input type="checkbox"/> Mitchell	
<input type="checkbox"/> Lankar	

fig.8

10) 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*).