

CUSTOMER VISIBILITY

Customers in the CPQ are divided into 2 separate areas, Global Customers and Local Customers. Global Customers are added by the administrator, and are available to all users who have the correct permissions to view them. Local Customers are added by individual users and are visible only to that user. Rules can be written that allow other users to view these customers.

NOTE: If no rules are written, every user will **only** be able to see the customers that he or she has defined.

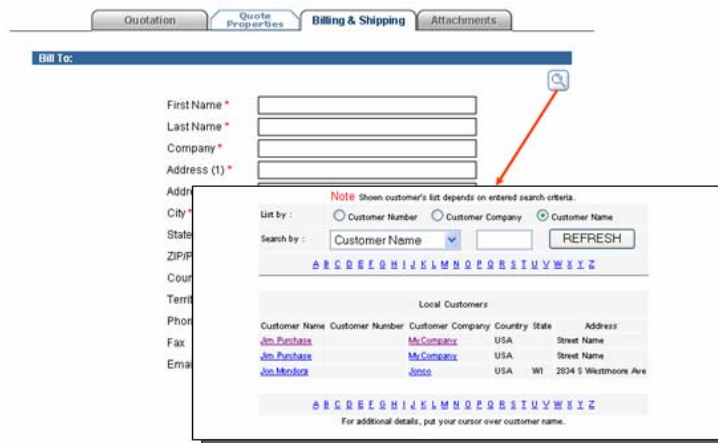


Figure 44-1 Load Existing Customer Link

Customer Visibility Rules defines which customers are shared or restricted when the user selects the **Magnifying Glass Icon** from the **Shipping and Billing** Tab, as shown in Figure 44-1.

Creating Customer Visibility Rules allows Administrators to control which customers are shared or restricted to each logged in user. Selecting the **Customer Visibility** link under the **Quotations/Projects** drop down menu will expand a sub menu. Within this sub-menu there are 2 choices: Global Customers and Local Customers.

GLOBAL CUSTOMERS

Global Customers are visible to all users. The Global Customers screen is shown in Figure 44-2.



Global Customer's Visibility Administration

Add new

| | Group | User | Company | Condition |
|------------|----------------------|----------------------|----------------------|----------------------------|
| S del edit | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| | | Catherine Jones | | 1 |
| | Channel Rep | | | [EQ]<-*CUSTOMERZIPCODE*... |

1

Total number of items in this view: 2. Page 1 of 1

Figure 44-2 – Global Customers

New Global Customer Visibility Rules can be added by selecting **Add New**. User (Employee), User Group (User Type) and Company are the only choices available and their order of precedence or ranking is set in **Priorities>Global Cust. Visibility**. (See Ch. 36 Priorities for more information). There can only be one rule per each combination of choices. Any expression can be used in the condition statement that evaluates to a logical 1 or 0.

In this example, Peter Johnson will be able to see all customers located in Germany. This rule's logic is as follows:

If the logged in User is Peter Johnson, then condition is evaluated: Is customer country and Germany equal? If so evaluate to 1 (Yes) if not evaluate to 0 (No). Figure 44-5

Global Customer's Visibility Administration

■ = required field

| | | |
|---|---|---|
| User Type : | Employee : | Company : |
| <ul style="list-style-type: none"> Channel Rep CUSTOMER Direct Sales Sales Management | <ul style="list-style-type: none"> John Smith Mike Sanderson Nenad Opah Windfree Peter Johnson | <ul style="list-style-type: none"> Amazon Distribution Inc Co_Name Eastcoast Distribution Inc GMS |

Condition :

[EQ]<-*CUSTOMERCOUNTRY*,>Germany)

SAVE

Figure 44-5 Global Customers – Peter Johnson / Germany

Another example to illustrate a condition applied to an individual user: In Figure 44-6, Will Peterson will be able to see all customers whose zip code = 53202.

Global Customer's Visibility Administration ☐ = required field

User Type : Employee : Company :

Channel Rep
 CUSTOMER
 Direct Sales
 Sales Management

Nenad
 Opah Windfree
 Peter Johnson
 predrag katancevic
 Will Peterson

Amazon Distribution Inc
 Co_Name
 Eastcoast Distribution Inc
 GMS

Condition :

[EQ](<*<CUSTOMERZIPCODE*>,53202)

SAVE

Figure 44-6 Global Customer Visibility – Will Peterson / 53202

Any user from Westcoast Distribution Inc. will be able to see all customers within their same territory. Global Customers Administration is shown on Figure 44-7.

Global Customer's Visibility Administration ☐ = required field

User Type : Employee : Company :

Channel Rep
 CUSTOMER
 Direct Sales
 Sales Management

Catherine Jones
 clarence
 Dusan
 Holly Cook

Eastcoast Distribution Inc
 GMS
 Real Inc
 WebSoft Inc
 Westcoast Distribution Inc

Condition :

<*<SAMETERRITORY*>

SAVE

Figure 44-7 Global Customer Visibility – Westcoast Dist. / Same Territory

The same conditions used for Global customers can also be used with Local Customers.

LOCAL CUSTOMERS

Local Customers visibility is based on rules that are defined for each customer. Administration for Local Customers Visibility is shown in Figure 44-8

Customer Visibility Administration

Add new

| Group | User | Condition |
|------------|-----------------|----------------------------|
| S del edit | Catherine Jones | [EQ](<*<CUSTOMERZIPCODE... |

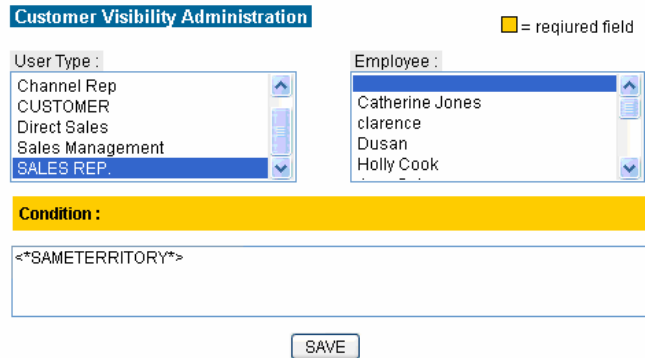
1

Total number of items in this view: 1. Page 1 of 1

Figure 44-8 Local Customers Visibility Administration

New Local Customer Visibility Rules can be added by selecting **Add New**. User

(Employee) and User Group (User Type) are the only choices available and their order of precedence or ranking is set in **Priorities>Local Cust. Visibility**. (See Ch. 36 Priorities for more information). There can only be one rule per each combination of choices. Any expression can be used in the condition statement that evaluates to a logical 1 or 0. In this example, each user that is a member of Sales Rep group will be able to see all local customers located within their Territory. See Figure 44-9.



Customer Visibility Administration ■ = required field

User Type :
 Channel Rep
 CUSTOMER
 Direct Sales
 Sales Management
SALES REP.

Employee :
 Catherine Jones
 clarence
 Dusan
 Holly Cook

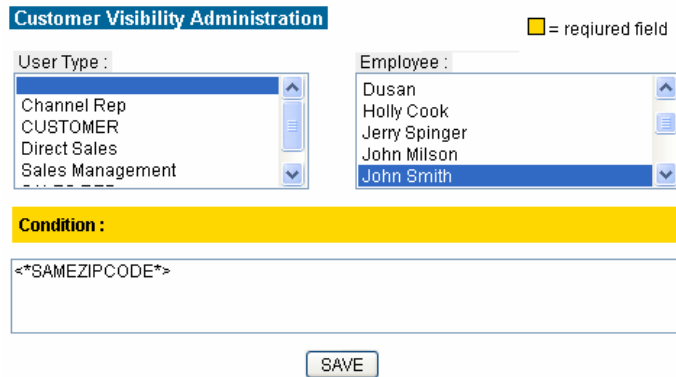
Condition :

<*<SAMETERRITORY*>

SAVE

Figure 44-9 Local Customer Visibility Sales Rep / Customer Territory

In the Example shown in Figure 44-10, employee John Smith will see the customers with the same zip code as he has.



Customer Visibility Administration ■ = required field

User Type :
 Channel Rep
 CUSTOMER
 Direct Sales
 Sales Management

Employee :
 Dusan
 Holly Cook
 Jerry Spinger
 John Milson
John Smith

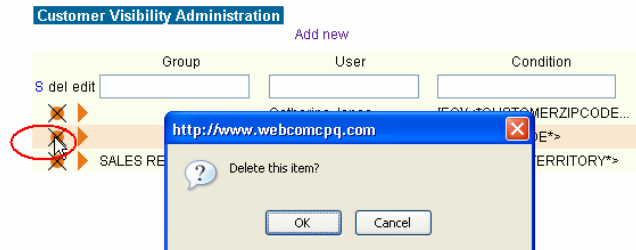
Condition :

<*<SAMEZIPCODE*>

SAVE

Figure 44-10 – Local Customer Visibility John Smith / Same Zip Code

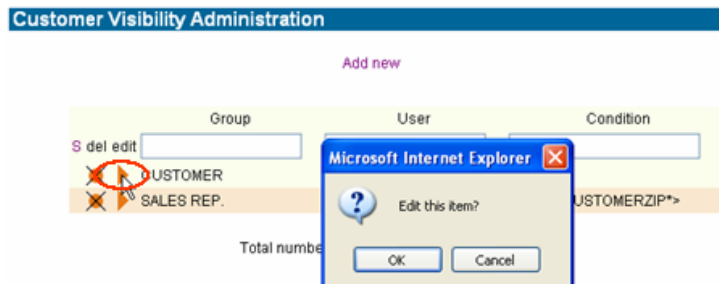
DELETING CUSTOMER VISIBILITY RULES



To delete a customer visibility rule, click the icon with an **X** through it next to the rule to be deleted. A message box will appear asking to confirm the deletion. Click **OK** to confirm the delete and **Cancel** to abort.

NOTE: Once a rule is deleted, it cannot be undone. This can be especially bothersome if a rule is deleted unnecessarily that includes a long expression. Make sure that the correct rule is being deleted.

EDITING CUSTOMER VISIBILITY RULES



To edit a customer visibility rule, click the **Triangle** next to the rule to be edited. A message box will appear asking when or this item should be edited. Click **OK** to edit the rule. This will bring up the same screen as shown in Figure 44-5 or Figure 44-9 depending if Global or Local customers are being edited.