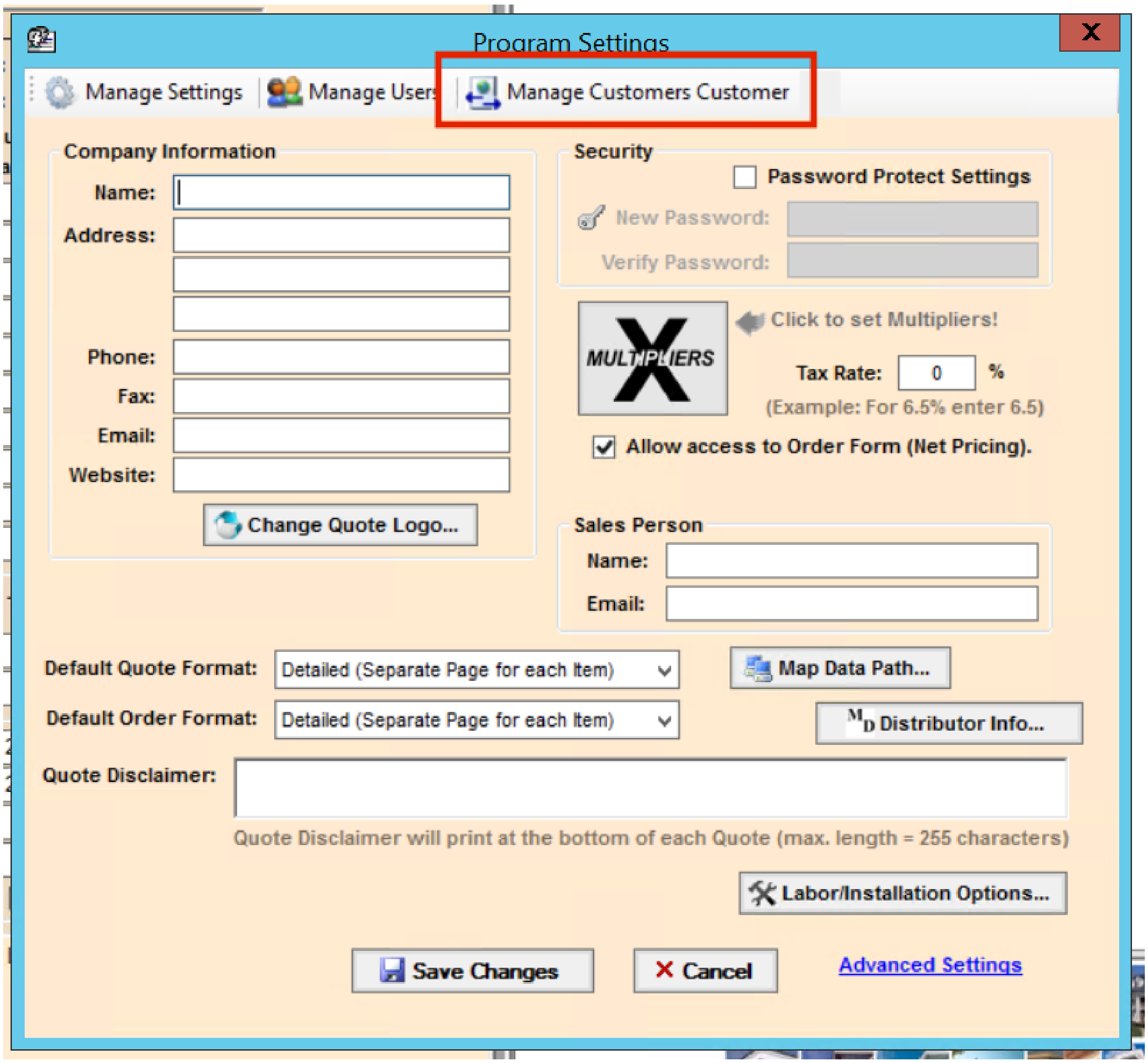
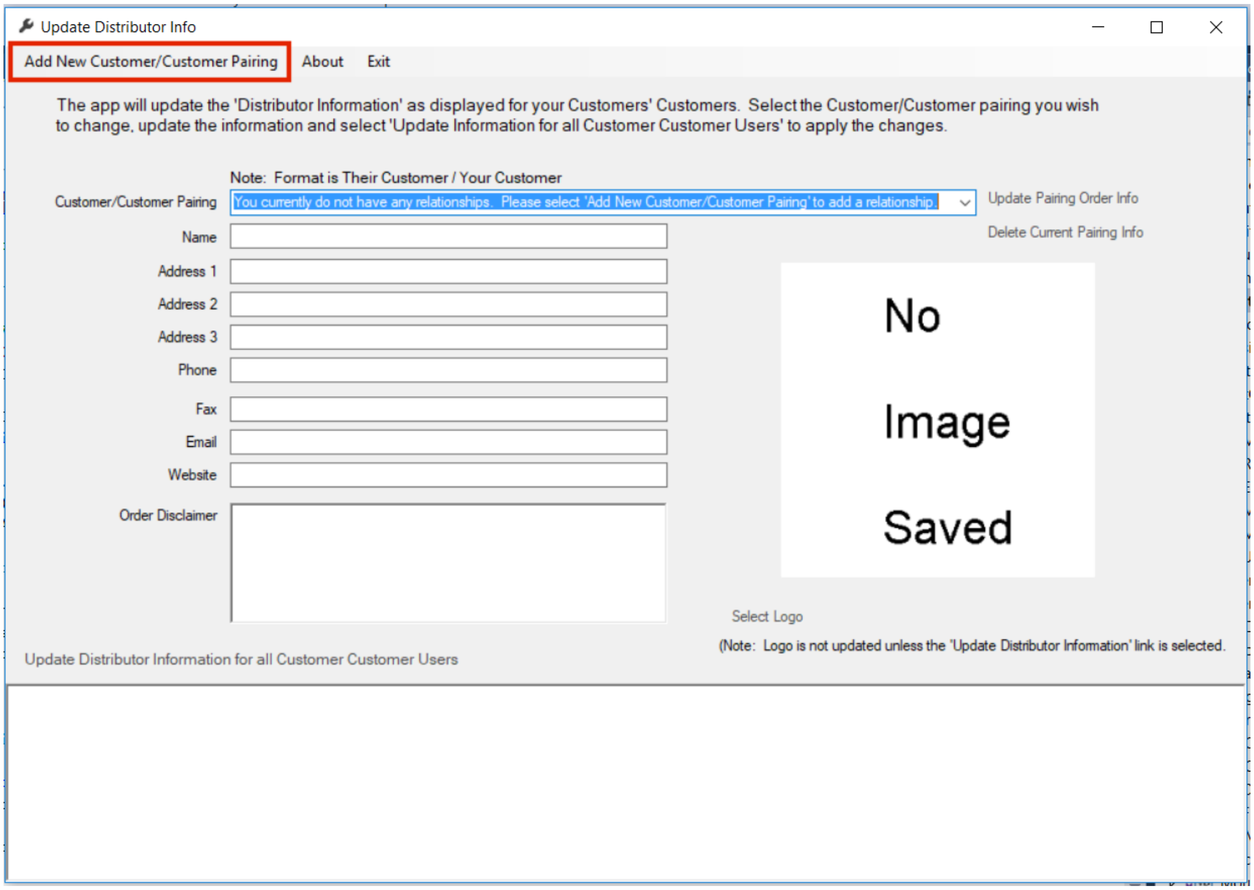
Customer's Customer Setup

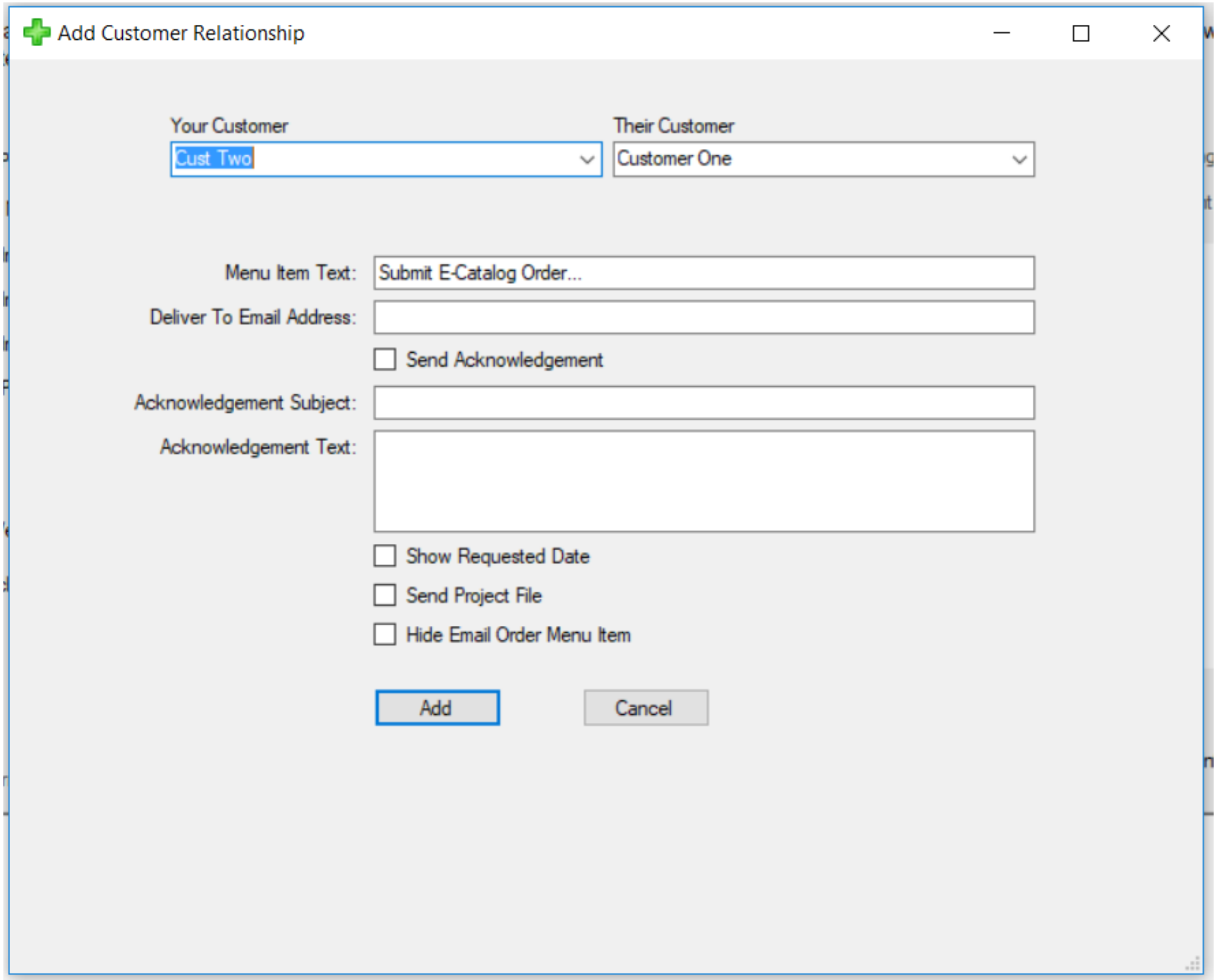
An optional feature of the E-Catalog is the ability to create customer relationships. The Customers' Customer Feature allow an E-Catalog Customer to be set up as a customer of another E-Catalog customer. If you have a customer that would like to offer your E-Catalog to one or more of their customers the Customers' Customer Feature is ideal.

After you have signed up for the Customers' Customer Feature you will get an additional command on the Program Settings toolbar (Online Users Only). All options of the Customers' Customer Feature are administered from '**Manage Customers Customer'** link.



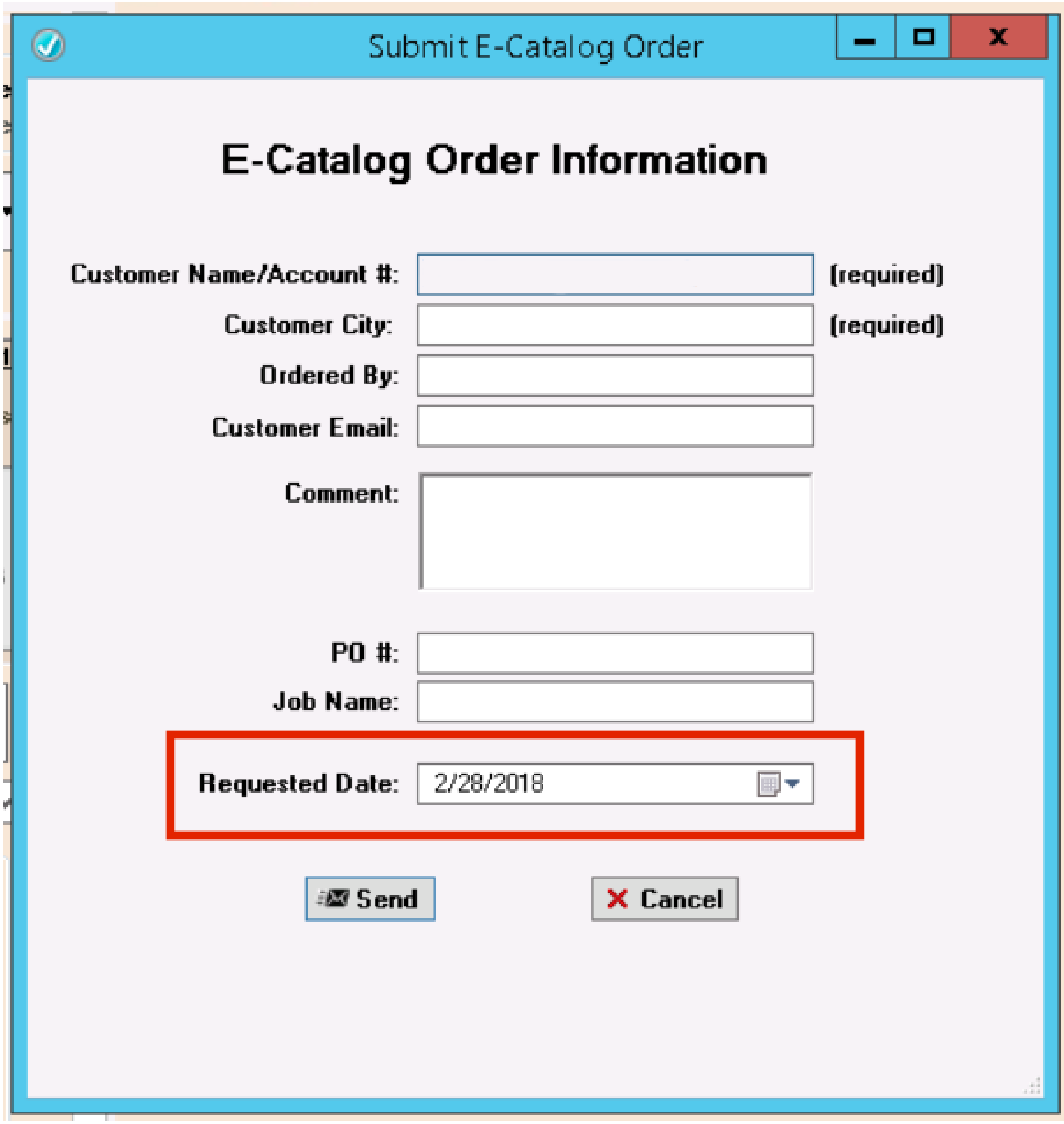
When you first navigate to the '**Update Distributor Info'** form the '**Customer/Customer Pairing'** drop down will contain a message indicating that you do not have any relationships set up. Click the '**Add New Customer/Customer Pairing**' to add your first relationship.





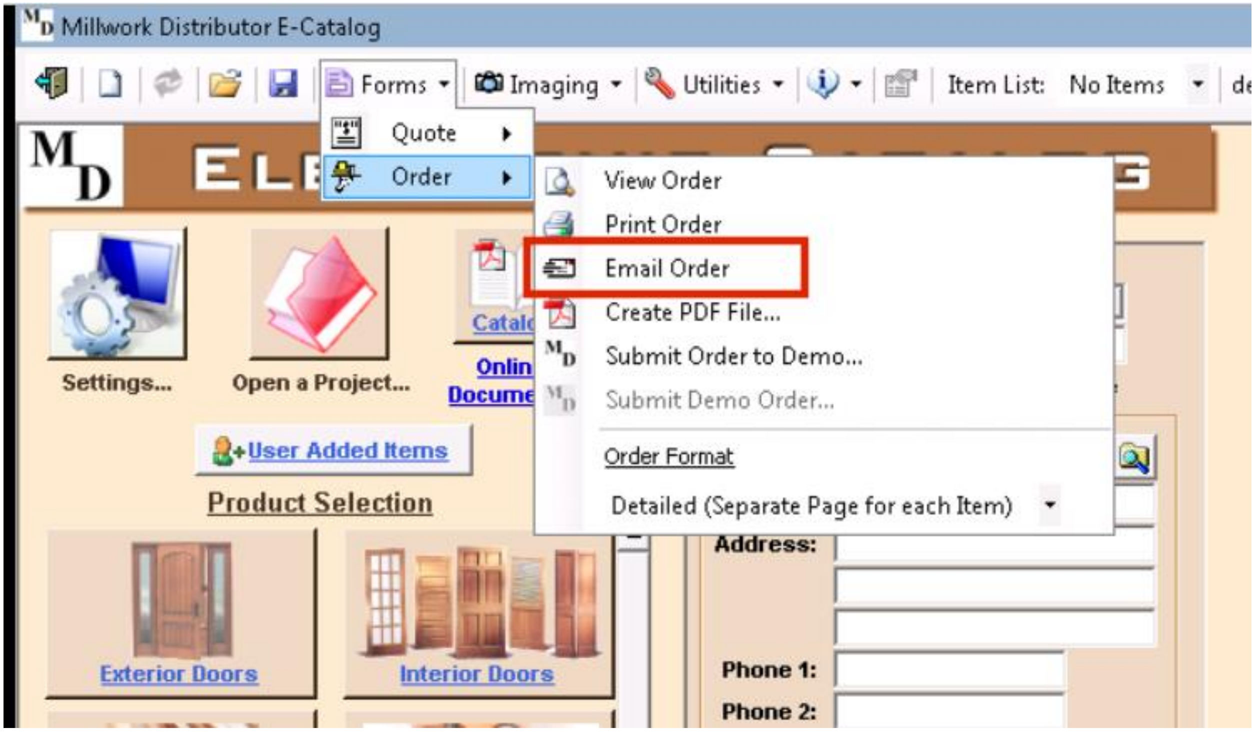
Select **your** customer from the first drop down and **their** customer from the second drop down. The **'Deliver to Email Address'** is the email address to which their customer's orders will be sent. An acknowledgment is optional. If your customer wishes to have an acknowledgement sent automatically upon the receipt of an order, check the '**Send Acknowledgment**' check box and enter an acknowledgment subject and text (Note: if the **'Send Acknowledgment'** check box is checked an acknowledgment subject and text is required). The **Show Requested Date, Send Project File** and **Hide Email Order Menu Item** are optional feature which are explained below:

Show Requested Date – If **the Show Requested Date** check box is checked the '**Requested Date'** field is shown on the order information form and the requested date is sent in the body of the order email.



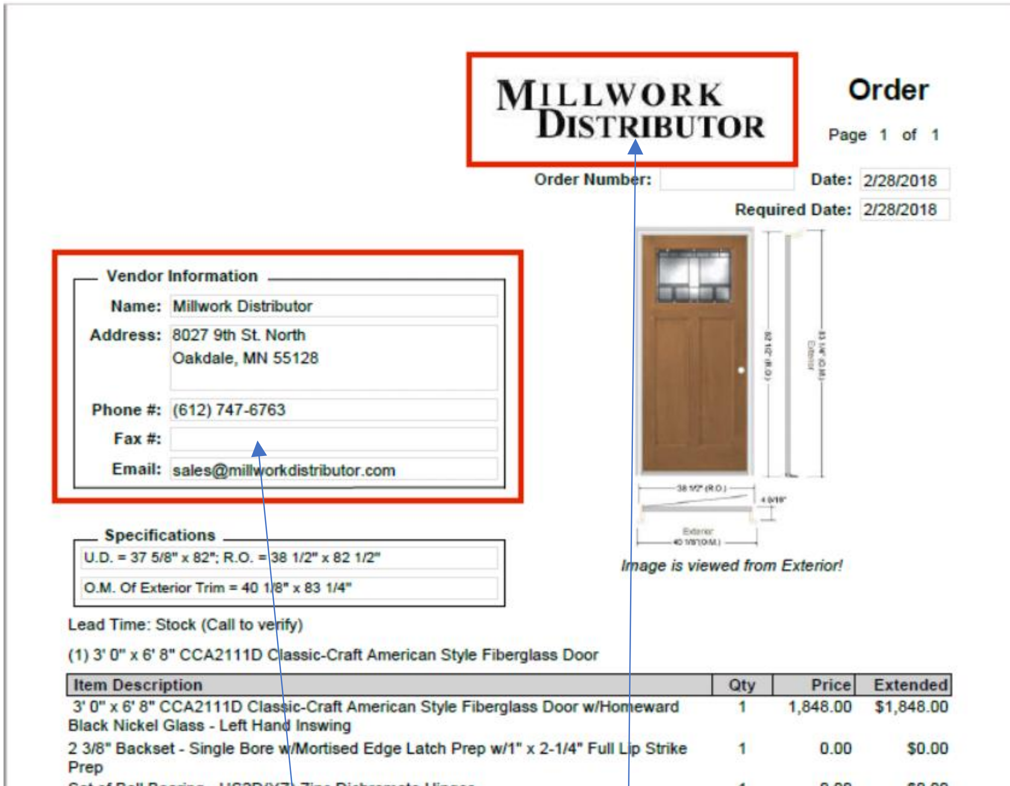
Send Project File determines if an E-Catalog project file of the order is included in the email. The project file could then be opened by your customer to replicate the order being sent.

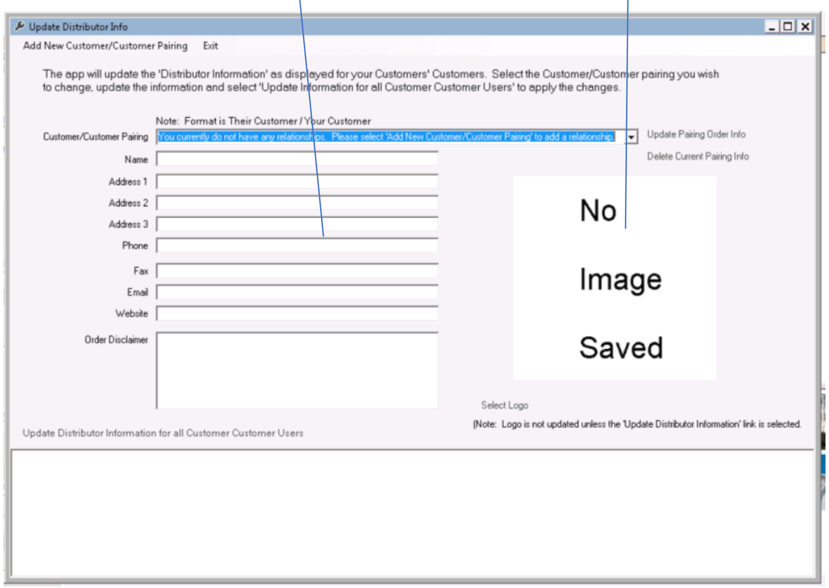
Hide Email Order Item determines if the **Email Order** menu items is shown in the E-Catalog. If checked the Email Order menu item is not shown.



Select the '**Add'** button to create the Customer Relation will create the customer relationship set up on the form and return you to the Management Form. From the Management form you can update the Order Form Information for the selected customer relationship, return and update the order information for the selected relationship, delete the selected customer relationship or add a new customer relationship.

The fields on Update **Distributor Information** form are used to configure how an order is viewed by your customer's customer. By default, the order form is not changed when a new customer relationship is created. You can update this information to display your customer's customers information on the order form. The order form logo is replaced by the selected logo and the Vendor Information is replaced by the other fields on the **Distributor Information** form.





Contact Millwork Development Customer Service at 612-999-4072 if you have any questions regarding the set up or use of the Customer Relationship Feature.