
CRW050 Work with Contact Access

Overview

Contact access must be defined for e-Commerce users. Fields and classifications the Contact has access to, are defined by access type. Together with the access type definition, templates can be added and used to default the Contact information. For example when a Contact logs on to e-Commerce their address can be set to default.

Access types could include public registration and business registration. The access type groups the same type of Contacts together who would have the same default information.

The available access types are:

- Change access - Work with Contact Access in change mode to maintain the contact access definition.
- Copy access - Work with Contact Access in copy mode to copy an existing contact access definition to a new one.
- Delete access - Work with Contact Access in delete mode to delete the contact access definition.
- Master access - Work with Contact Access in change mode to maintain the contact access security level definition.
- Cust class access - Work with Classification Access in change mode to maintain the customer classification access security level definition.
- Cont class access - Work with Classification Access in change mode to maintain the contact classification access security level definition.

Examples

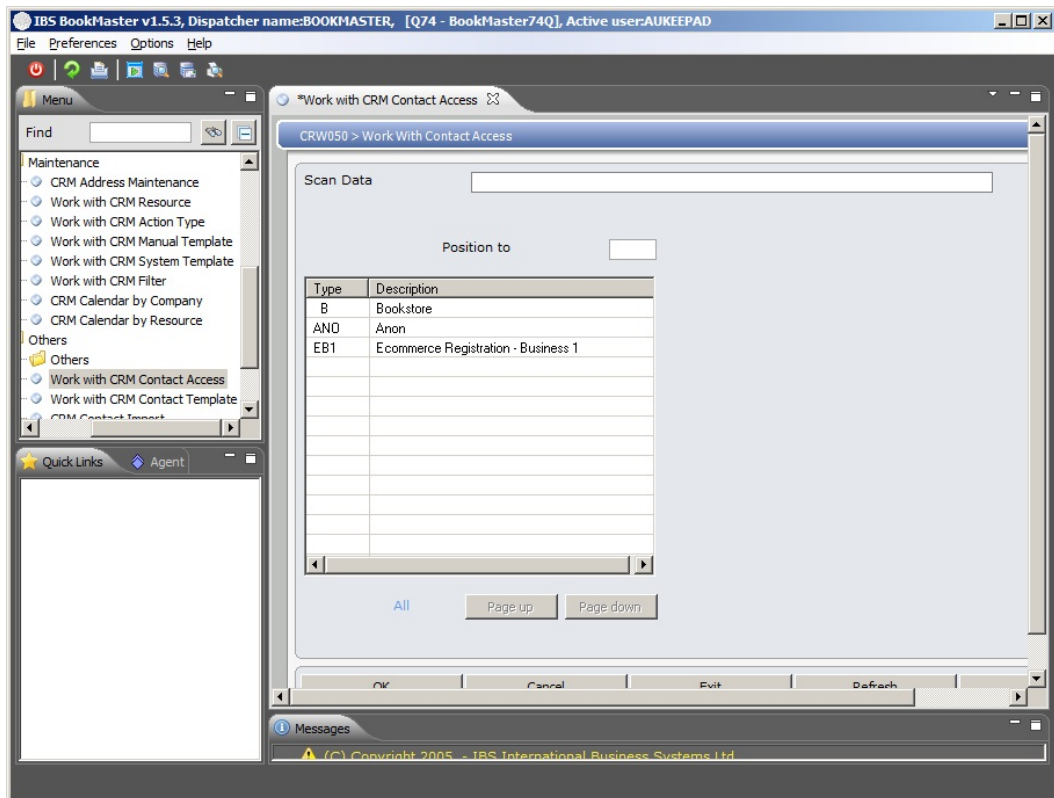
This section illustrates examples concerning:

[Example 1: To add Contact Access](#)

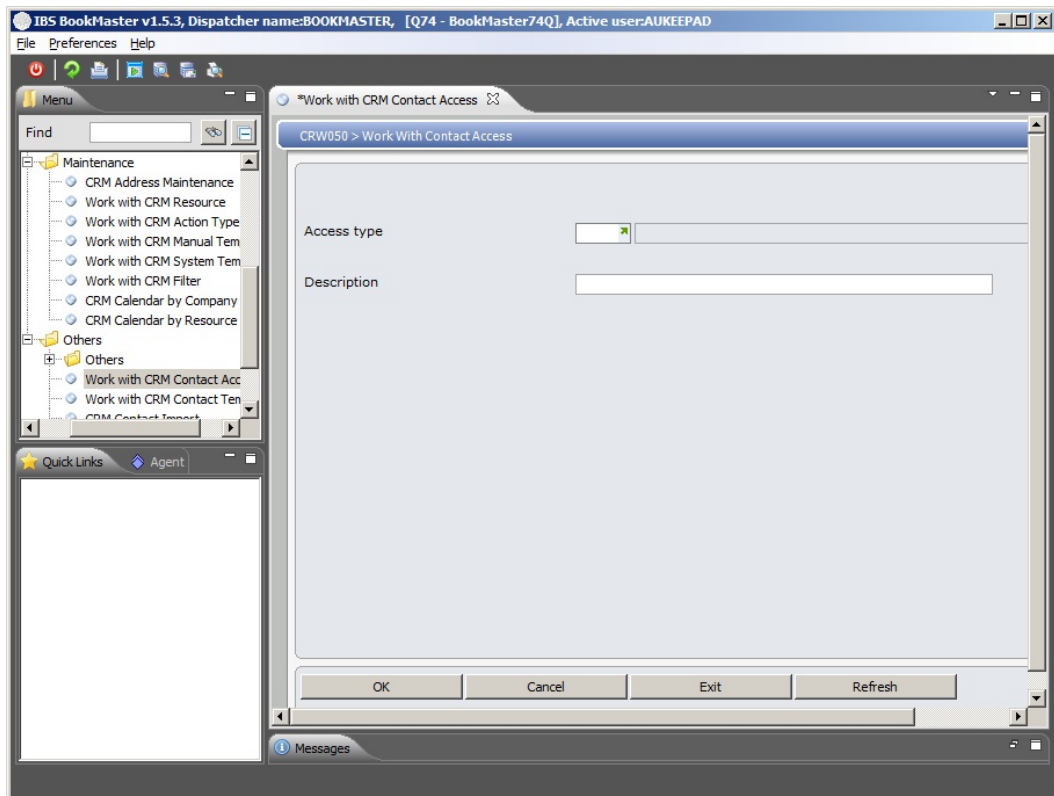
Example 1: To add Contact Access

1. Select option **Work with CRM Contact Access** from Publishing Modules>Customer Relationship Management>Others>Others.

CRW050 Work with Contact Access panel listing all available contact access types, is displayed.



2. To add an access type definition click Add.



Relevant Fields

Access type

This determines the access type allowed for the External

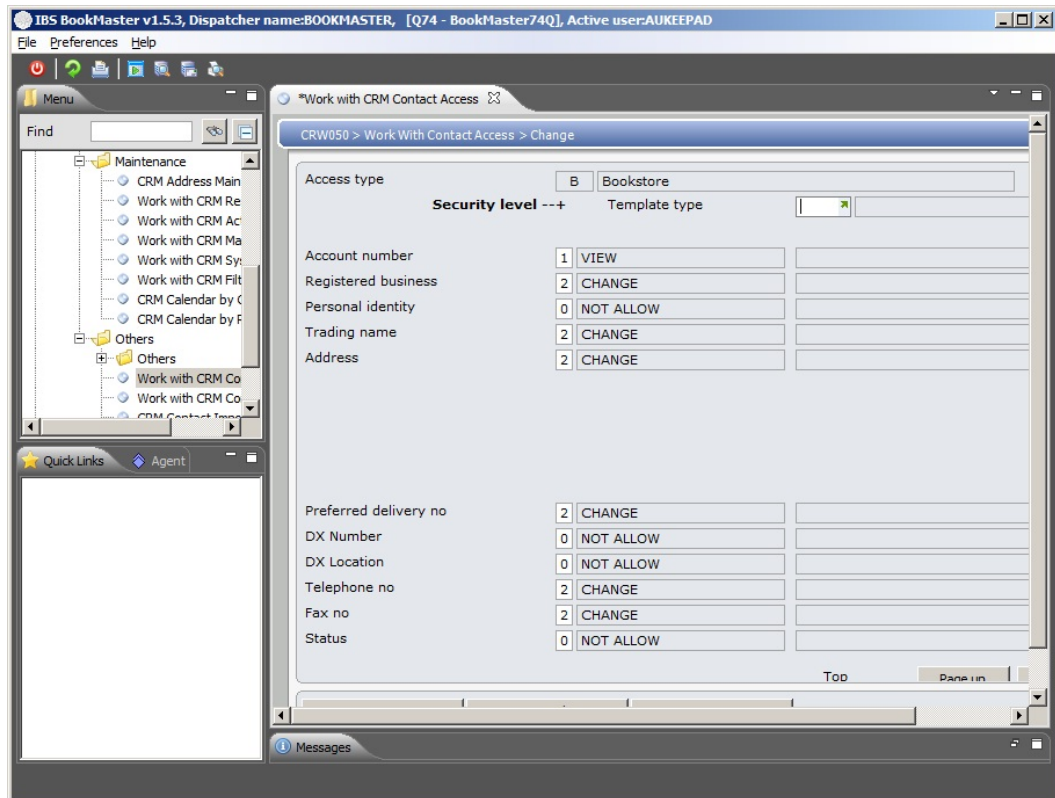
user.

Description

This is a brief description of the issue, template or action being created. When exporting information to Excel a description can be exported.

The description of the access, class type or incident. When importing Contacts the description is one given to the import.

3. Enter the required values and click OK twice.



Relevant Fields

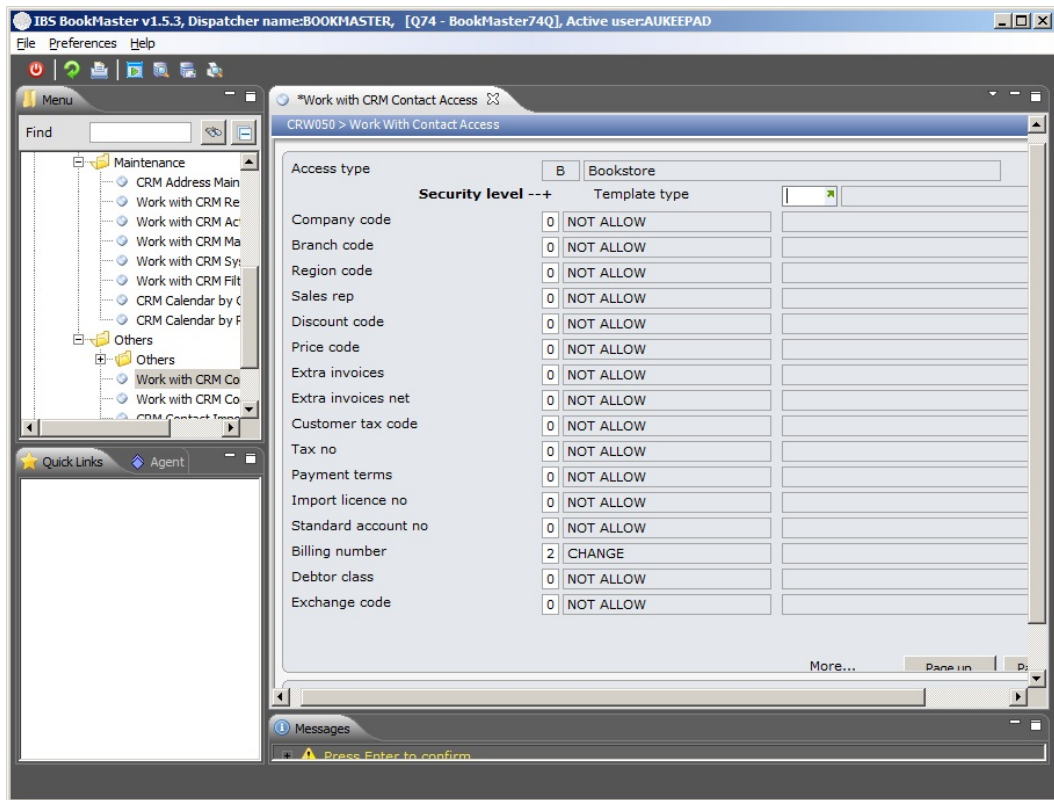
- | | |
|------------------------------|--|
| Account number | Specify the contact access permission for the Account number field. |
| Registered business | Specify the contact access permission for the Registered business field. |
| Personal identity | Specify the contact access permission for the Personal identity field. |
| Trading name | Specify the contact access permission for the Trading name field. |
| Address | Specify the contact access permission for the Address field. |
| Preferred delivery no | Specify the contact access permission for the Preferred delivery no field. |
| DX number | Specify the contact access permission for the DX number field. |
| DX location | Specify the contact access permission for the DX location field. |

Telephone no Specify the contact access permission for the Telephone no field.

Fax no Specify the contact access permission for the Fax no field.

Status Specify the contact access permission for the Status field.

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Relevant Fields

Company code Specify the contact access permission for the Company code field.

Branch code Specify the contact access permission for the Branch code field.

Region code Specify the contact access permission for the Region code field.

Sales rep Specify the contact access permission for the Sales rep

Discount code Specify the contact access permission for the Discount code field.

Price code Specify the contact access permission for the Price code

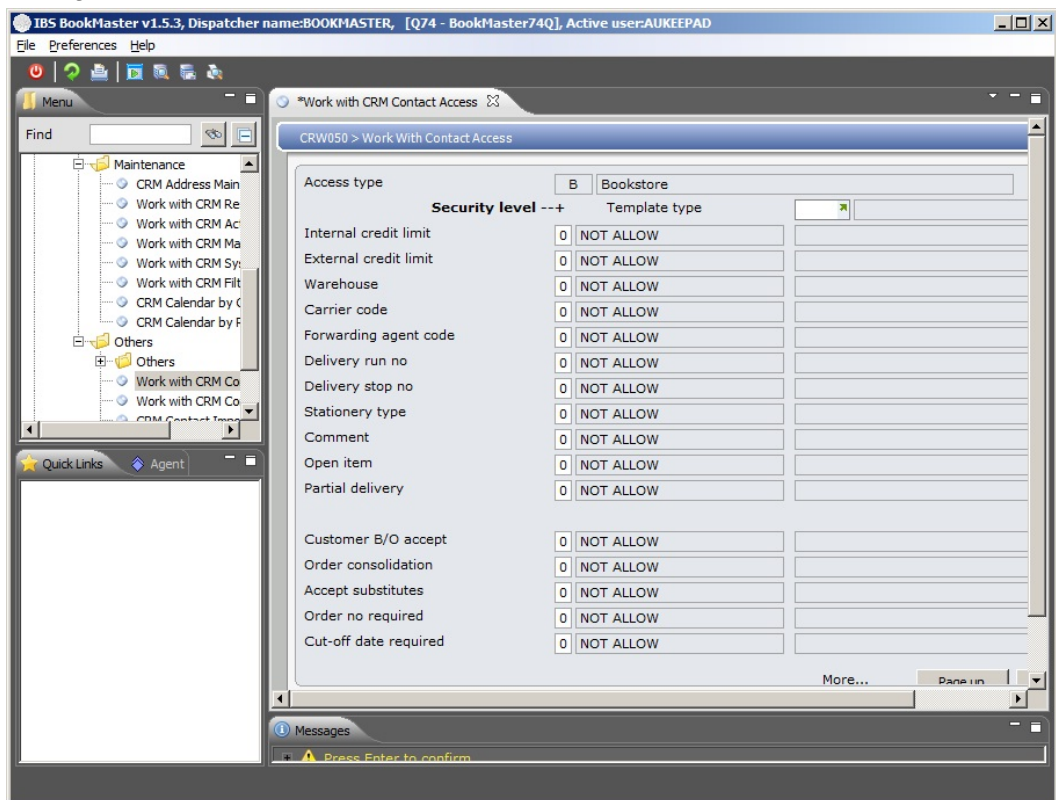
Extra invoices Specify the contact access permission for the Extra invoices field.

Extra invoices net Specify the contact access permission for the Extra invoices net field.

Customer tax code Specify the contact access permission for the Customer tax code

- code field.
- Tax number** Specify the contact access permission for the Tax number field.
- Payment terms** Specify the contact access permission for the Payment terms field.
- Import licence number** Specify the contact access permission for the Import licence number field.
- Standard account number** Specify the contact access permission for the Standard account number field.
- Billing number** Specify the contact access permission for the Billing number field.
- Debtor class** Specify the contact access permission for the Debtor class field.
- Exchange code** Specify the contact access permission for the Exchange code field.

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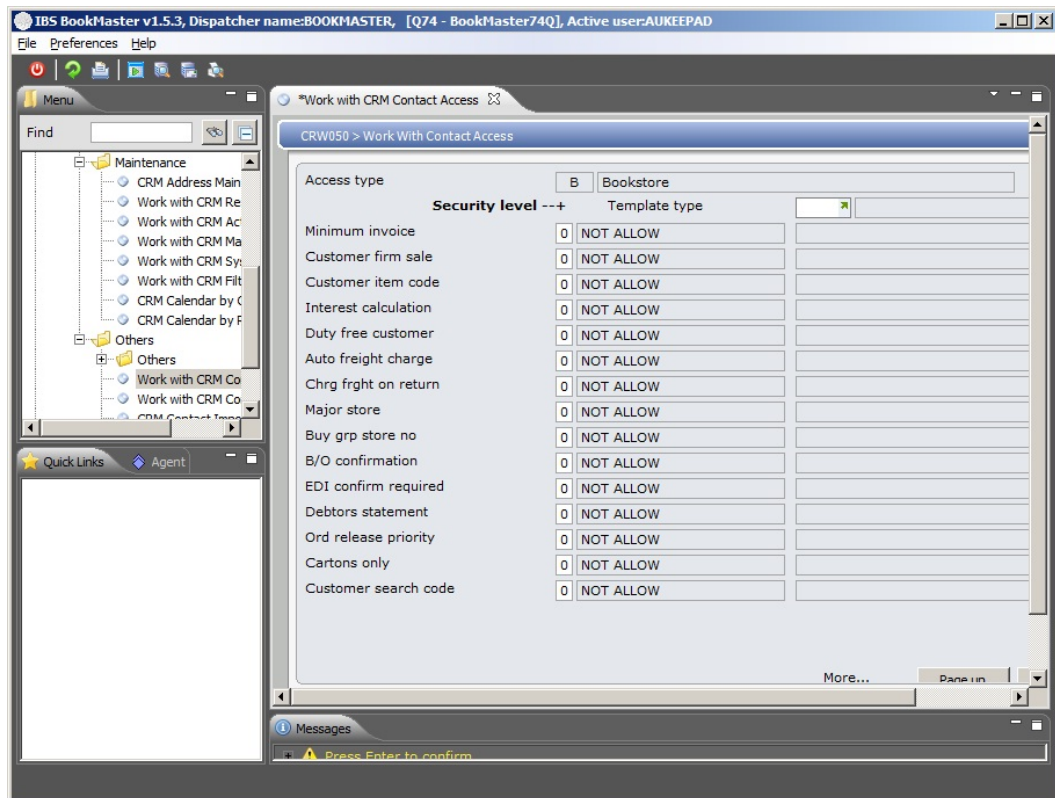


Relevant Fields

- Internal credit limit** Specify the contact access permission for the Internal credit limit field.
- External credit limit** Specify the contact access permission for the External credit limit field.

Warehouse	Specify the contact access permission for the Warehouse field.
Carrier code	Specify the contact access permission for the Carrier code field.
Forwarding agent code	Specify the contact access permission for the Forwarding agent code field.
Delivery run number	Specify the contact access permission for the Delivery run number field.
Delivery stop number	Specify the contact access permission for the Delivery stop number field.
Stationary type	Specify the contact access permission for the Stationary type field.
Comment	Specify the contact access permission for the Comment field.
Open item	Specify the contact access permission for the Open item field.
Partial delivery	Specify the contact access permission for the Partial delivery field.
Customer B/O accept	Specify the contact access permission for the Customer B/O accept field.
Order consolidation	Specify the contact access permission for the Order consolidation field.
Accept substitutes	Specify the contact access permission for the Accept substitutes field.
Order number required	Specify the contact access permission for the Order number required field.
Cur-off date required	Specify the contact access permission for the Cur-off date required field.

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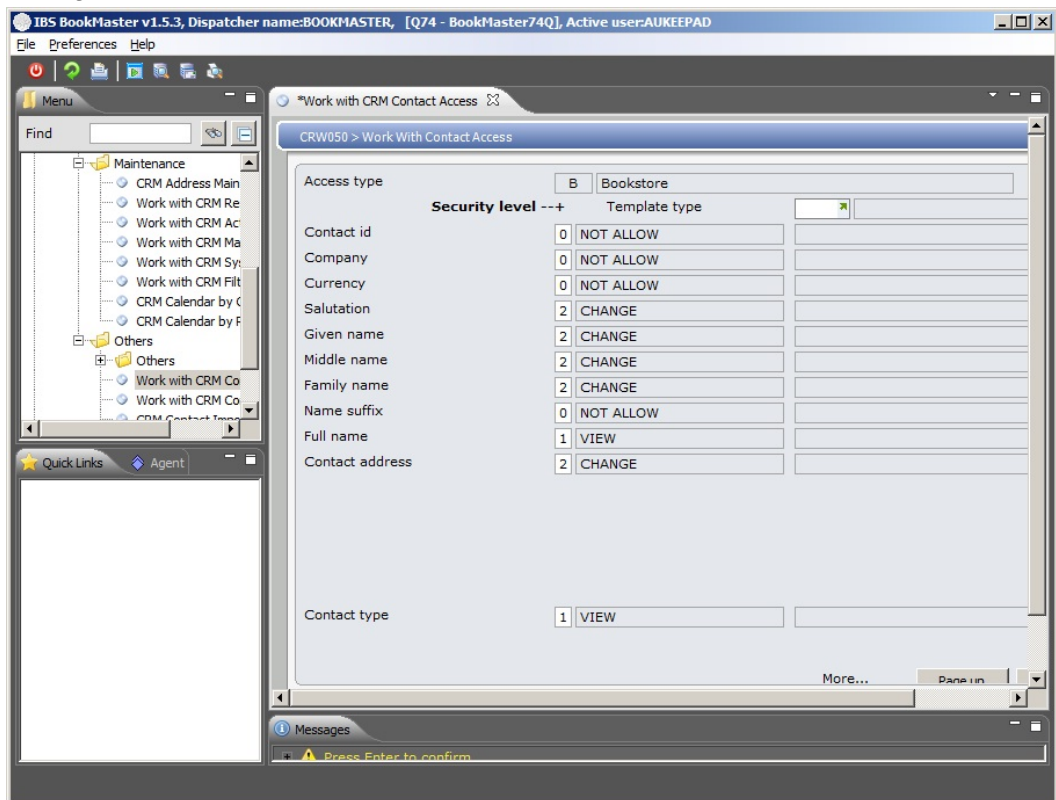
Relevant Fields

Minimum invoice	Specify the contact access permission for the Minimum invoice field.
Customer firm sale	Specify the contact access permission for the Customer firm sale field.
Customer item code	Specify the contact access permission for the Customer item code field.
Interest calculation	Specify the contact access permission for the Interest calculation field.
Duty free customer	Specify the contact access permission for the Duty free customer field.
Auto freight charge	Specify the contact access permission for the Auto freight charge field.
Charge freight on return	Specify the contact access permission for the Charge freight on return field.
Major store	Specify the contact access permission for the Major store field.
Buy group store number	Specify the contact access permission for the Buy group store number field.
B/O confirmation	Specify the contact access permission for the B/O confirmation field.
EDI confirmation	Specify the contact access permission for the EDI confirmation required field.

required

- Debtors statement** Specify the contact access permission for the Debtors statement field.
- Order release priority** Specify the contact access permission for the Order release priority field.
- Cartons only** Specify the contact access permission for the Cartons only field.
- Customer search code** Specify the contact access permission for the Customer search code field.

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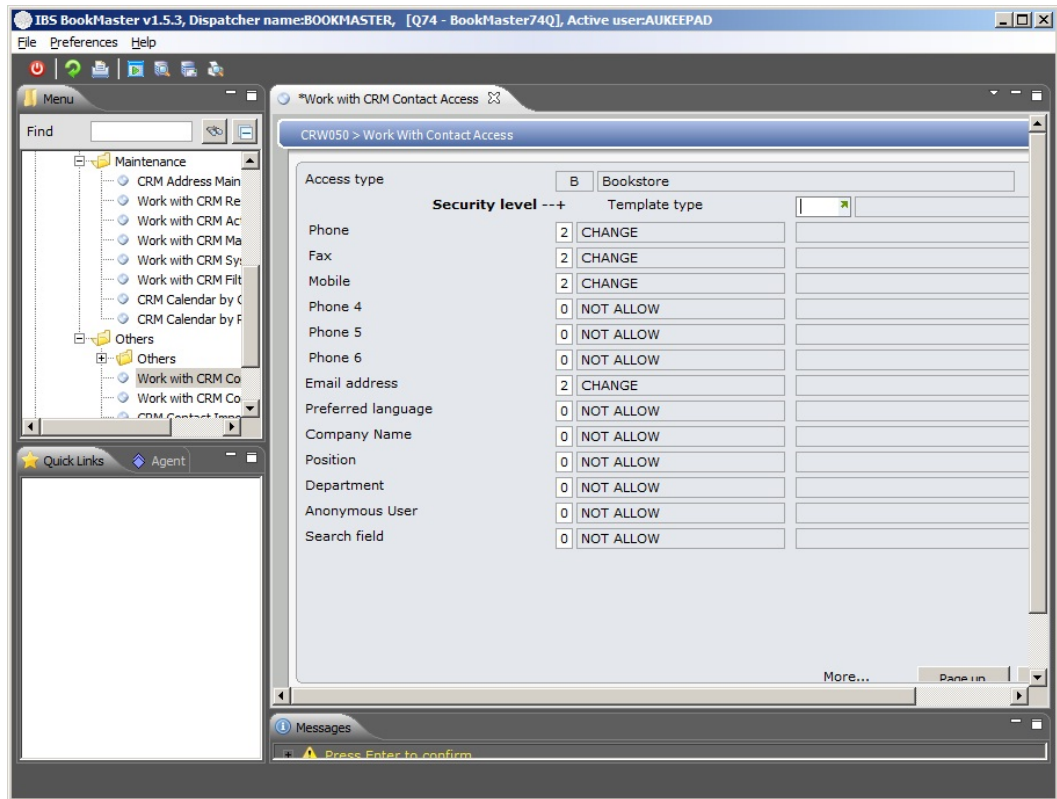


Relevant Fields

- Contact ID** Specify the contact access permission for the Contact ID field.
- Company** Specify the contact access permission for the Company field.
- Currency** Specify the contact access permission for the Currency field.
- Salutation** Specify the contact access permission for the Salutation field.
- Given name** Specify the contact access permission for the Given name field.
- Middle name** Specify the contact access permission for the Middle name field.
- Family name** Specify the contact access permission for the Family name field.

- Name suffix** Specify the contact access permission for the Name suffix field.
- Full name** Specify the contact access permission for the Full name
- Contact address** Specify the contact access permission for the Contact address field.
- Contact type** Specify the contact access permission for the Contact type field.

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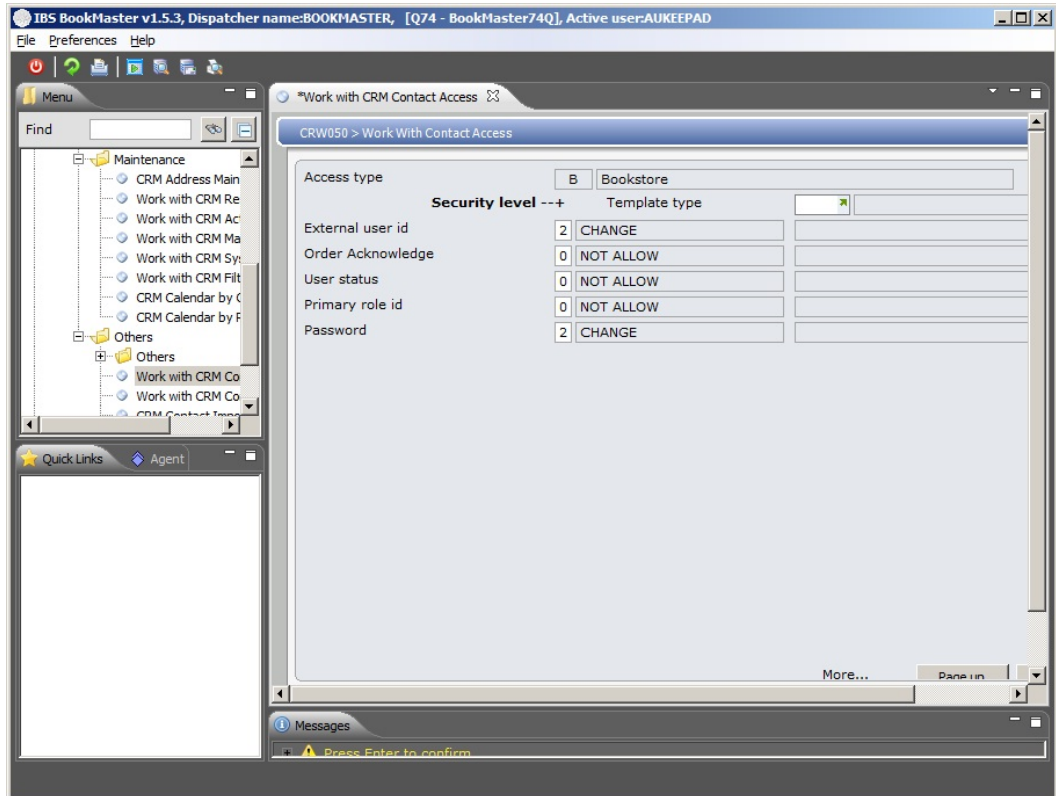


Relevant Fields

- Phone** Specify the contact access permission for the Phone field.
- Fax** Specify the contact access permission for the Fax field.
- Mobile** Specify the contact access permission for the Mobile field.
- Phone 4** Specify the contact access permission for the Phone 4 field.
- Phone 5** Specify the contact access permission for the Phone 5 field.
- Phone 6** Specify the contact access permission for the Phone 6 field.
- Email address** Specify the contact access permission for the Email address field.
- Preferred language** Specify the contact access permission for the Preferred language field.
- Company Name** Specify the contact access permission for the Company Name field.

- Position** Specify the contact access permission for the Position field.
- Department** Specify the contact access permission for the Department field.
- Anonymous user** Specify the contact access permission for the Anonymous user field.
- Search field** Specify the contact access permission for the Search field.

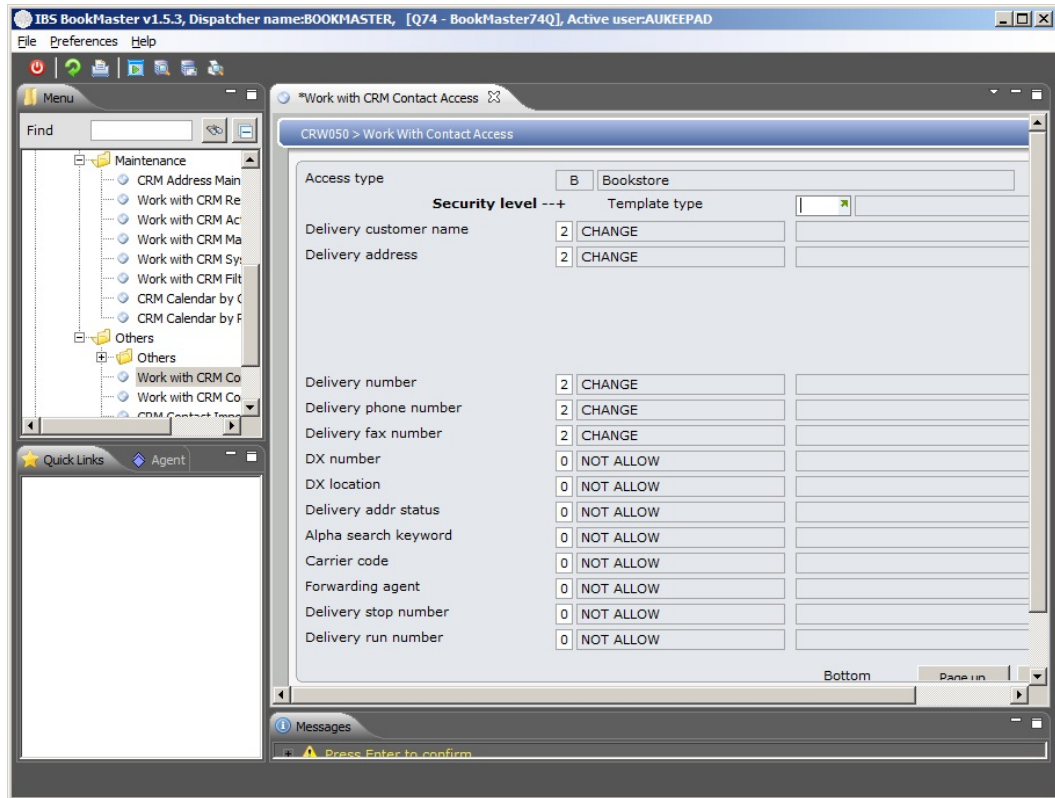
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Relevant Fields

- External user ID** Specify the contact access permission for the External user ID field.
- Order acknowledge** Specify the contact access permission for the Order acknowledge field.
- User status** Specify the contact access permission for the User status field.
- Primary role ID** Specify the contact access permission for the Primary role ID field.
- Password** Specify the contact access permission for the Password field.

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Relevant Fields

- Delivery customer name** Specify the contact access permission for the Delivery customer name field.
- Delivery address** Specify the contact access permission for the Delivery address field.
- Delivery number** Specify the contact access permission for the Delivery number field.
- Delivery phone number** Specify the contact access permission for the Delivery phone number field.
- Delivery fax number** Specify the contact access permission for the Delivery fax number field.
- DX number** Specify the contact access permission for the DX number field.
- DX location** Specify the contact access permission for the DX location field.
- Delivery address status** Specify the contact access permission for the Delivery address status field.
- Alpha search keyword** Specify the contact access permission for the Alpha search keyword field.
- Carrier code** Specify the contact access permission for the Carrier code field.

Forwarding agent	Specify the contact access permission for the Forwarding agent field.
Delivery stop number	Specify the contact access permission for the Delivery stop number field.
Delivery run number	Specify the contact access permission for the Delivery run number field.

11. Select the security level against each field for the access type. Click **OK** twice after all details have been entered.

Note The security levels determines whether the contact is not allowed access, has view only access or has maintenance access.