

---

# DSW224 Work with Customer Contact

---

*Overview* Work with Customer Contact program allows you to add and maintain contacts linked to a customer. External users are allocated an ID and a password to gain access to a Web site when using e-Commerce.

*Purpose* This panel allows you to:

Link contacts/external users to Customers

---

## Explanation

Contacts are added to the system and linked to the Customer. Resources added to the system must also be added as a Contact so as to maintain necessary details like email address, phone numbers, etc.

Contacts can be added via three ways:

- Contact Management
- Customer Management using the Contact option
- Work with Resource

---

## Customer Masterfile

The **Work with Contact** screen is automatically accessed while adding a new account to the Customer Masterfile.

It is also accessed in Customer Masterfile maintenance mode by selecting the option **Customer Contact Maintenance**.

---

## CRM

The CRM module accesses this function from its **Contact Management** menu option.

---

## e-Commerce External Users

e-Commerce uses Contact Management for External Users Maintenance.

---

## e-Commerce Account Holders

The function of this program is to create and maintain external users associated with a customer for e-Commerce purposes. Users are allocated an ID and a password, which is used to log on to the web and order goods from a customer.

A link is set up to link to an existing customer on the masterfile.

An External User Profile Option shows users their current customer discount and orders etc.

External Users can also be maintained via the External User Maintenance by Customer Menu Option on the e-Commerce Menu.

---

## e-Commerce Anonymous Users

Anonymous users on web will only be created as a contact in the system when they register. If a user does not register and checks out the purchased items then the anonymous name and address details for the user will be on the order delivery address but it will have no contact ID. If the anonymous user registers prior to checking out then the contact will be created and the contact ID and the new customer details will be on the order. Once an order is placed by an anonymous user and the order details have been fulfilled the system sends an order acknowledgement via e-mail to the user and keeps a record of the e-mail address.

If the anonymous user is ordering a subscription via e-Commerce they must register their user name and password in the Order details screen. Once they have registered their user name and password it is automatically created within the External user Maintenance program and the Customer Masterfile as a new account. It also adds that customer to the Sub list.

---

## Examples

This section illustrates examples concerning:

[Example 1: To add a contact](#)

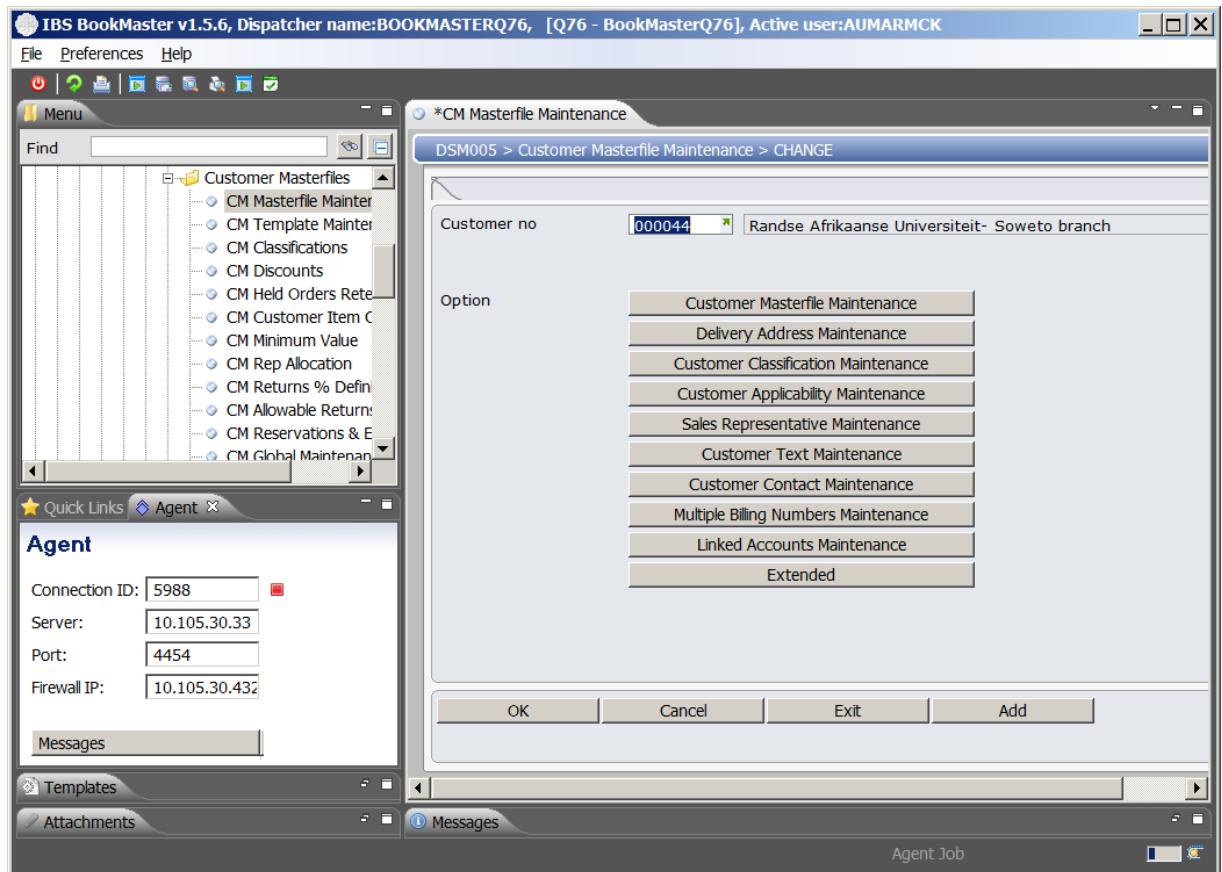
---

### Example 1: To add a contact

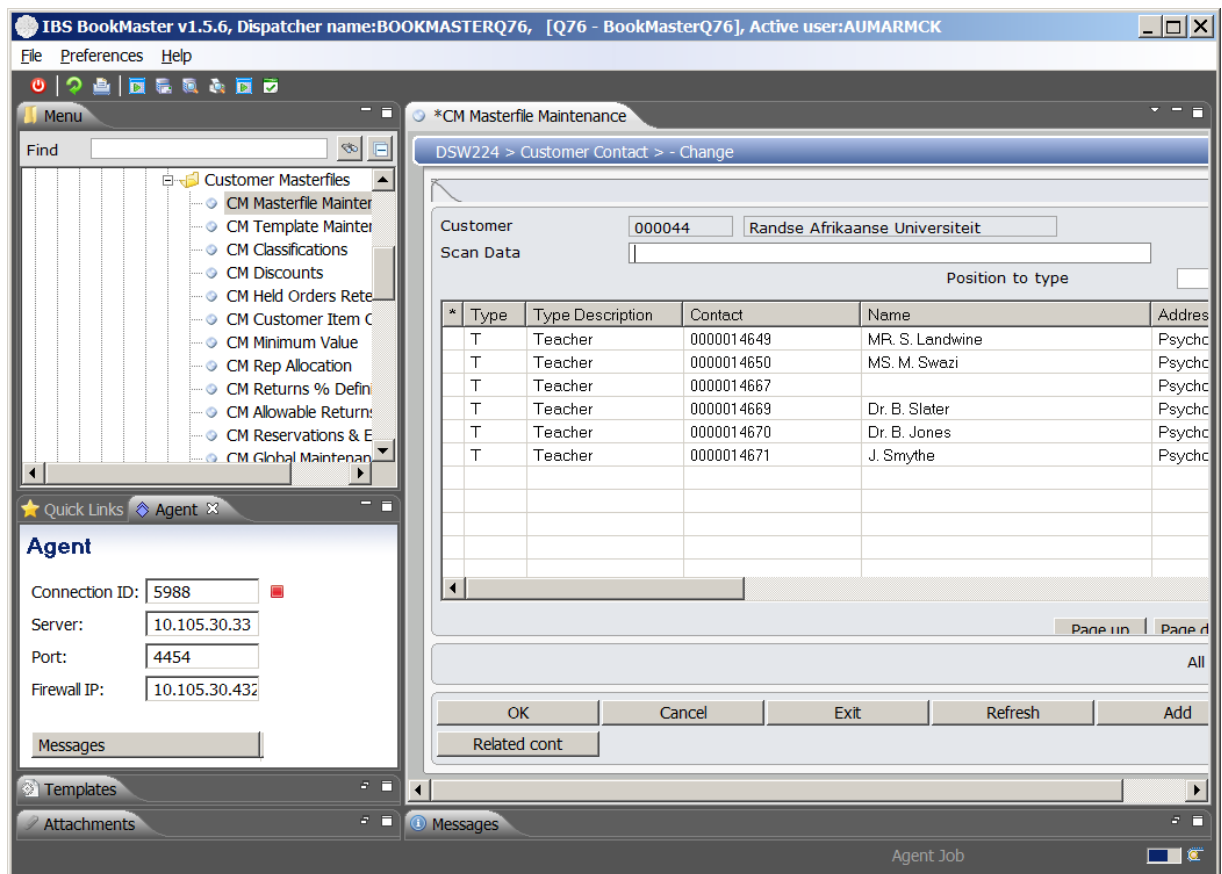
This example describes how to add a contact/external user to the system.

1. Select option **CM Masterfile Maintenance** from Base Modules>Distribution>Masterfiles>Database Management>Database Management>Customer Masterfiles>Customer Management menu.

**DSM005 Customer Masterfile Maintenance** panel is displayed.



2. Specify the **Customer no** and select option **Customer Contact Maintenance**.  
**DSW224 Customer Contact** panel is displayed in change mode.



## Functions

### Add

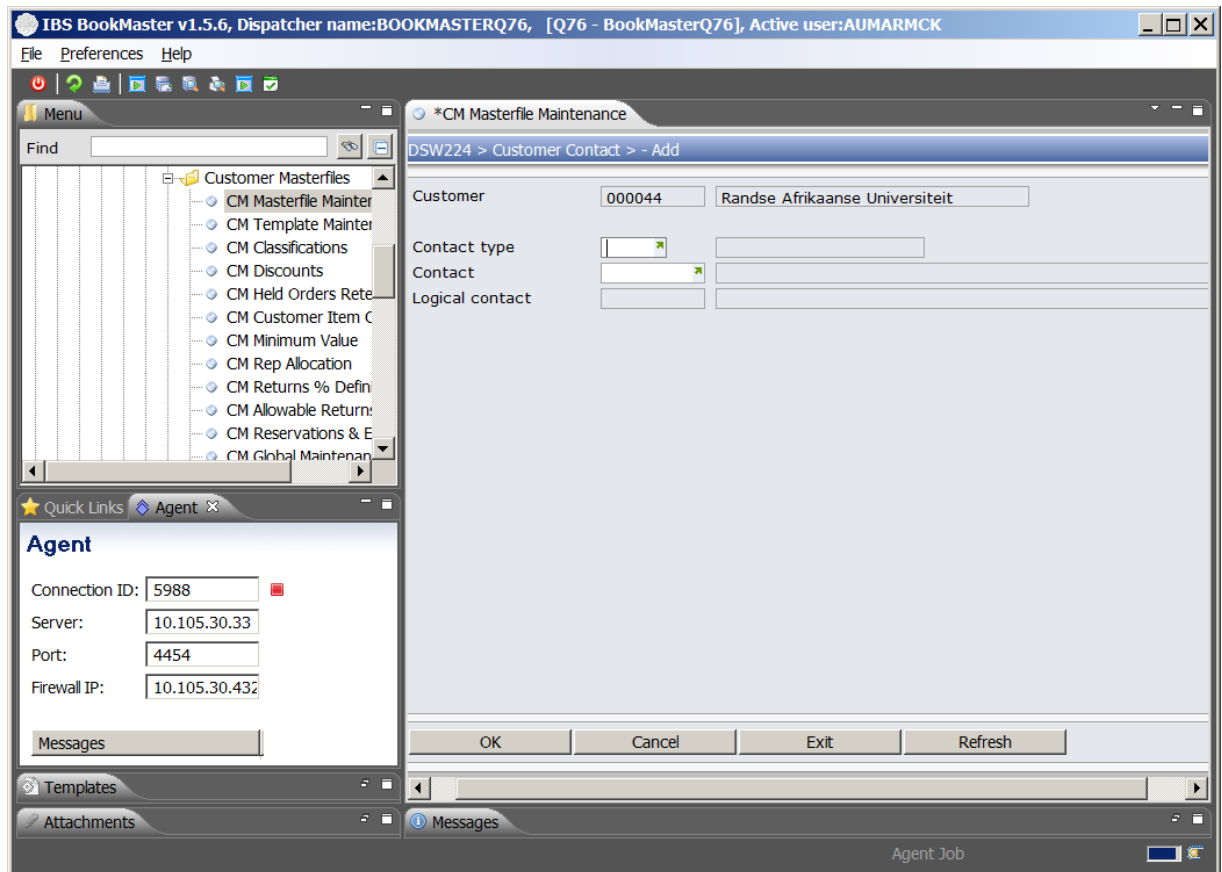
Adds a new contact against a customer.

## Options

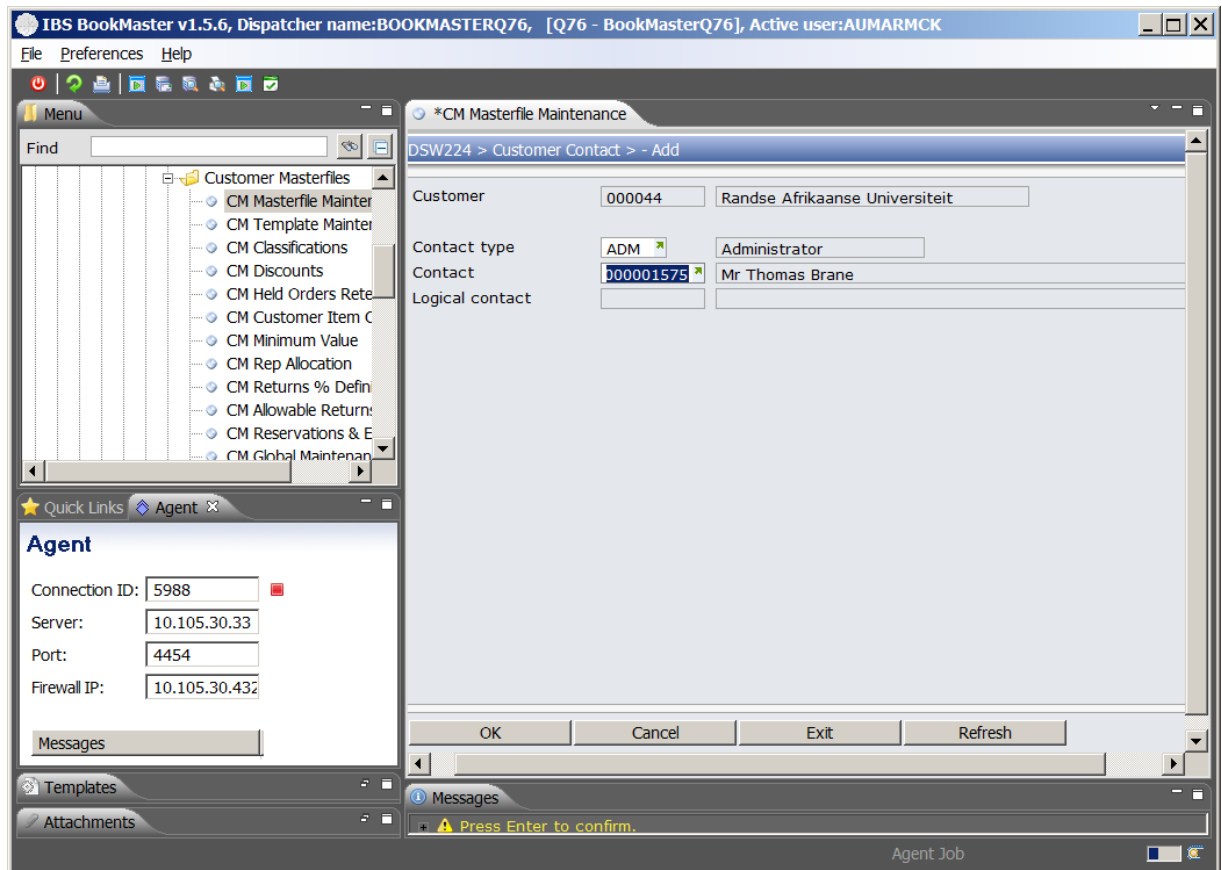
### Contact

Provides access to CRW055 to Work with the Contact.

## 3. Click Add.



4. Add the new contact for the customer.



5. Click OK and the contact is added to the customer.

