Account Types

Trade Customers

To be a Trade Customer, this must be enabled on the Account tab by an User when editing a Customer.

Registration

A Trade Customer may be manually registered, but a User must confirm their status before the Customer Account can be used.

If enabled, a Customer may register as a Trade Customer on the website. This will generate an email enquiry that will prompt a User to authorise the Trade application.

Purpose

Trade Customers will gain the following benefits:

- Trade specific Products
- Trade specific Pricing (Trade Price and Trade Special Offer Price)

> Note that Price Lists and Pay on Account are not restricted to Trade Accounts and that all Customers may benefit from them

Retail Customers

This is the default Customer Type.

Registration

A Retail Customer may be manually registered in the POS or CMS.

A Customer may create an account on the website.

A retail account will always be available for immediate use.

> Note that Price Lists and Pay on Account are not restricted to Trade Accounts and that all Customers may use them

Summary of Account Statuses

> Any Customer may be marked as a Retail or Trade Customer

There are four primary Customer Statuses:

- Registered
- Guest
- In-Store
- Pending Approval

Registered

A Registered Customer is one who has fully registered their account through the website.

This will either be:

- directly through the website, where they have registered an account, entered their personal details and set up a password (this may, or may not have been as part of an eCommerce purchase)
- by following up on an In-Store transaction to fully register their account (see below)

Guest

This is the default for an eCommerce customer who has not set up a password.

> All eCommerce Customers are prompted to set up a password once they have completed their transaction.

In-Store

Unless previously registered, all In-Store customers will be recorded as an In-Store Customer. This will allow Sales People to access their account, and to place additional orders against that account.

> Customers will not be able to access their Order History unless they fully register their account.

All new In-Store Customers will be sent an email inviting them to register their account, e.g. set up a password, which will allow them to access their Sales Order history, account balance, amend personal details, etc. If they do so, additional Sales Orders placed online will be linked to the same account.

> If an In-Store Customer later places an eCommerce Order and registers properly, all In-Store Sales Orders will be linked to their Customer Account.

Pending Approval

All Trade Account registrations will come through as Pending Approval.

These Customers will not be able to place Sales Orders online until they have been manually approved.