

## How Do I Assign Different G/L and Inventory Locations To Each Customer?

My, how you've grown! To serve national and regional accounts with their own far-flung offices, your back-end system uses multiple General Ledger and Inventory locations and printers.

Whether you want to assign a specific shopper to one of your GL/Inv locations, or just have their invoices print at their sales representatives' printers, you can now get really granular. Your Admin Control Panel's Account Management feature now has more flexibility in managing accounts across multiple locations:


- GL/Inv code can be assigned to three levels: Customer, Department and Account.
- Printer code can be assigned to four levels: Customer, Department, Account, and GL/Inv Location.

### Setting Up Locations and Printer Codes in Your Back-End System

To use this feature, your back-end system must be set up with multiple G/L and Inventory Locations and/or Printer codes. For details, see your system help.

### Setting up a G/L Location's Inventory and Printer Codes in eCInteractive


You can assign an Inventory and Printer code to a G/L Location in Location Management.

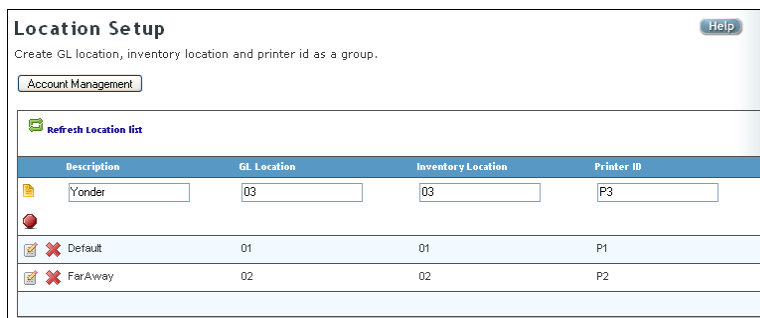
1. Log into your Admin site.
2. Click the **Site Info** menu option on the left, and select **Location Management**.  
Or, using the top training menu, click **Site Config** and then click **Location Management**.
3. To enter a new row, follow these steps:
  - Click  **Add new location**. A row with blank fields appears.
  - Enter a short **Description** that serves as the name of the location.
  - Enter your back-end system's ID for the General Ledger (**GL**) **Location**.
  - Enter your back-end system's ID for the **Inventory Location**.
  - Enter your back-end system's ID for the **Printer ID**.

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**Note:** Enter up to two alpha-numeric characters 00-ZZ that correspond to your back-end system's code for GL, Inv, and Printer ID.

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- To save the location, click . The grid refreshes and "Location Inserted" appears.

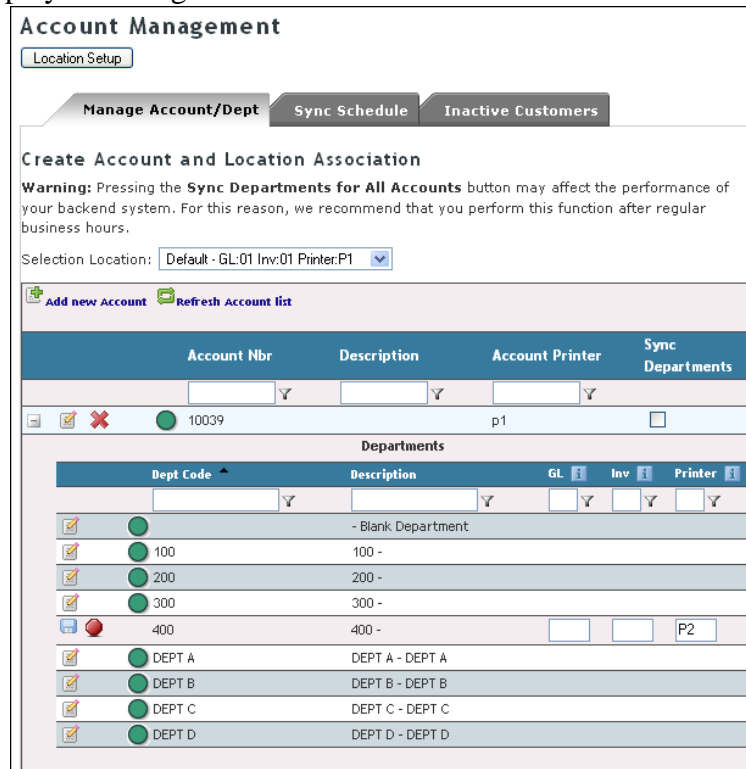


## Assigning G/L and Inventory Locations and Printers to Departments En Masse

You can assign GL, Inv, and Printer IDs to an entire customer's departments in the Account Management page:

1. If you are in the Location Setup page, click the **Account Management** button.  
Or, click the **Site Info** menu option on the left, and select **Location Management** and then click the **Account Management** button.  
Or, using the top training menu, click **Site Config** and then click **Location Management** and then select **Account Management** from the submenu.
2. (Optional) Use the **Filter** fields below the grid headings to set limits.
  - o To limit to a particular Account Number, Description, or Printer ID, enter a value that appears in that column.
  - o Click the **Filter** button for that column. A popup menu appears.
  - o Select an operator, such as **Contains, Equal To, Less Than** or **Greater Than**.  
The grid will refresh to display matching rows.

3. Click the **Expand** button to display the departments for a particular account.
4. (Optional) Use the **Sort** button in the heading row to sort the rows by that column.
5. (Optional) Use the **Filter** fields to set limits as described in step 2.
6. Click the **Edit** button. The row changes to display new buttons and fields for editing.
7. Enter up to two alpha-numeric characters 00-ZZ that correspond to your back-end system's code for GL, Inv, and Printer ID.




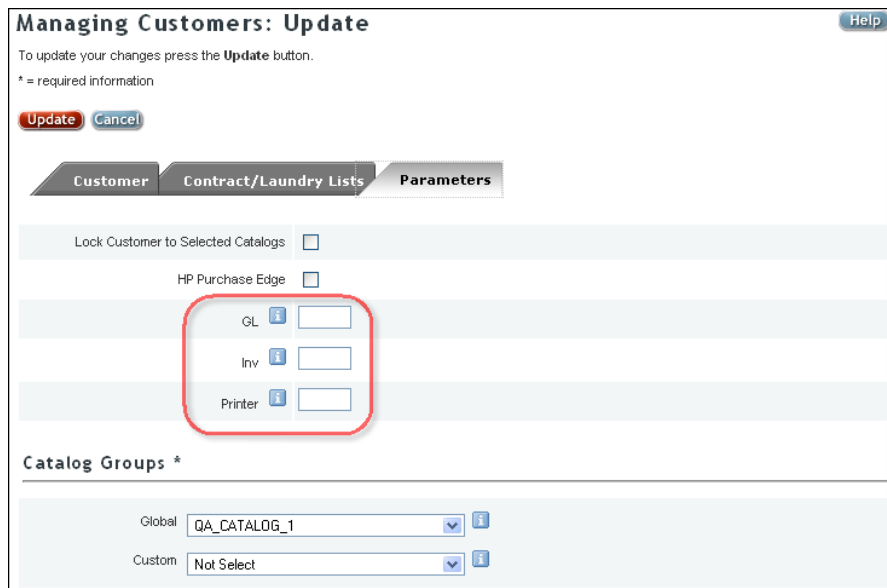
8. Click **Save**. The department sub-grid returns to the read-only mode.

**Note:** Clicking the **i** button by the GL, Inv, and Printer column header will display a pop-up note. In general, if a GL, Inv, and/or Printer code is displayed, it will override the location or printer code you assigned in your back-end system to this department's account.

## Assigning G/L and Inventory Locations and Printers to Individual Users

You can assign GL, Inv, and Printer IDs to a single customer using the Parameters tab of the Customer Management page:

1. On the left menu, click **Customer Admin** and select **Customer Management**.  
Or, at the top, click **Consumer Admin** and select **Customer Maintenance**.
2. (Optional) Limit the search by entering information about the customer, such as name, account, department, location, username, email, and so on.
3. Click **Search**.
4. In the Customer Search Results grid, click an individual customer's  button to view their settings.
5. Click the **Edit** button.
6. Click the **Parameters** tab.
7. Enter up to two alpha-numeric characters 00-ZZ that correspond to your back-end system's code for GL, Inv, and Printer ID.
8. Click the **Update** button. The department sub-grid returns to the read-only mode.



**Managing Customers: Update** Help

To update your changes press the **Update** button.


\* = required information


**Update** **Cancel**


**Customer** **Contract/Laundry Lists** **Parameters**

Lock Customer to Selected Catalogs


HP Purchase Edge


GL 


Inv 

Printer 

**Catalog Groups \***

Global QA\_CATALOG\_1 

Custom Not Select 

**Note:** Clicking the  button by the GL, Inv, and Printer column header will display a pop-up note. In general, if a GL, Inv, and/or Printer code is assigned to a customer, it will override the location or printer code you assigned in your back-end system to this user's account, *or any account or department they are allowed to order products through.*

## Mass Changing G/L and Inventory Locations to Groups of Customers

You can reassign GL, Inv, and Printer IDs to groups of customers using the Parameter Maintenance page, where you retrieve a list of customers with existing GL, Inv or Printer setting, and then update the group of customers with the new entered value.

1. On the left menu, click **Customer Admin** and select **Parameter Maintenance**.  
Or, at the top, click **Consumer Admin** and select **Parameter Maintenance**.
2. Limit to a particular location or printer ID by following these steps:
  - In the **Choose a parameter** field, click the down arrow and select either **GL Value**, **Inv Value**, or **Printer Value**, scrolling as needed. The system will populate the value drop-down field options.

- In the **Choose a value** field, click the down arrow and select the desired ID. The “Match Value” option will be enabled for these three parameters.
3. Click the **Search** button. The system retrieves customers matching records.

User Name	First Name	Last Name	Email	Account	Department
ponce	Ponce	de León	not@real.com	5034 - GH2 Company	LINO - DEPARTMENT DE LINO

4. (Optional) Use the **Filter** fields below the grid headings to set limits.
  - To limit to a particular name, email address, Account, or Department, enter a value that appears in that column.
  - Click the **Filter** button for that column. A popup menu appears.
  - Select an operator, such as **Contains**, **Equal To**, **Less Than** or **Greater Than**. The grid will refresh to display matching rows.
5. In the **Apply new parameter value field**, enter up to two alpha-numeric characters 00-ZZ that correspond to your back-end system’s code for GL, Inv, and Printer ID.
6. Click the **Save** button.

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**Note:** Clicking the **i** button by the new parameter value field will display a pop-up note. In general, if a GL, Inv, and/or Printer code is assigned to a customer, it will override the location or printer code you assigned in your back-end system to this user’s or department’s account, *or any account or department they are allowed to order products through*.

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