Nexpart - Customer Account Management

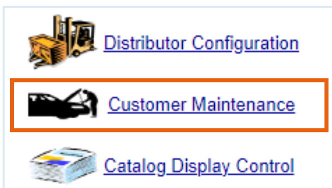
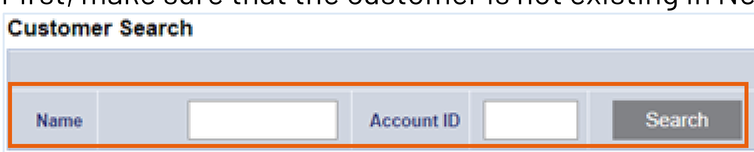
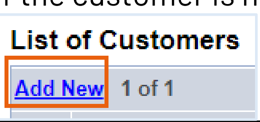
Introduction

This job aid reviews how to add and edit customer (shops/repairers) accounts to enable them to order via Nextpart.

Creating Customer Accounts

You need Nexpart admin user account to manage customer accounts.

To add customer accounts, follow the steps below:

Step	Action
1	Login to www.nexpart.com/admin.
2	Select **Customer Maintenance**. 
	First, make sure that the customer is not existing in Nexpart by using **Search**. 
3	If the customer is not existing, click **Add New** to add a customer. 
4	In the New Customer Wizard, enter: I. Customer Type: CCC Customer II. Select **Validate License Number** to verify and select **Next Step**. 

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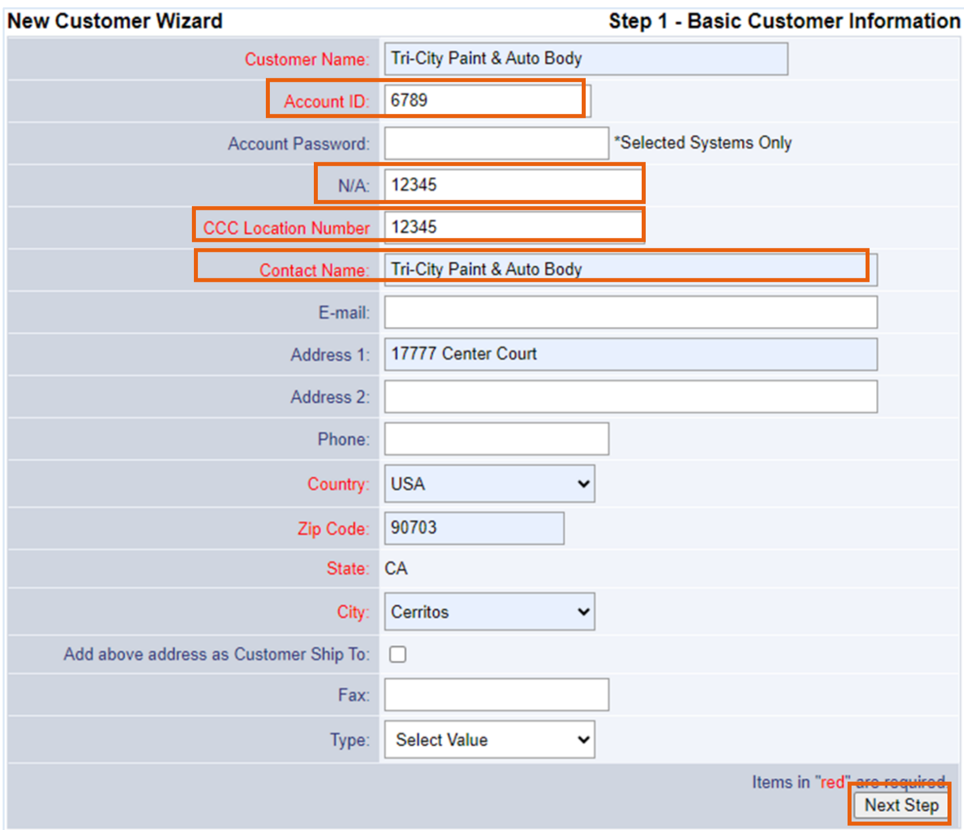
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>In the page that opens, add all required information and select Next Step. Customer name and address populates automatically based on license validation. You must complete following fields:
• Account Id: Shop account number as found in your DMS
• N/A: Recommended to enter “CCC License number” to allow for advanced search in Customer Maintenance.
• CCC Location Number: CCC License Number
• Contact Name: Owner, Manager, etc.


</td></tr>
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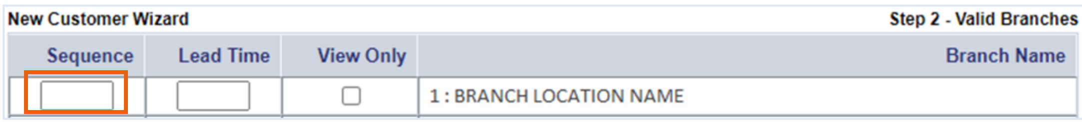
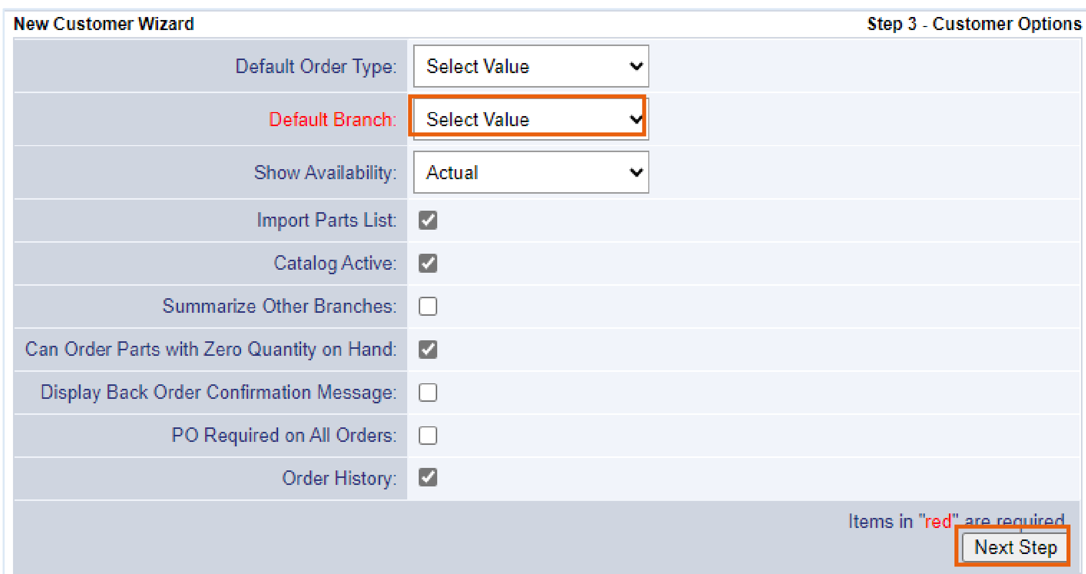
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Enter Sequence number (1-99) for Valid Branches and select Next Step.


If multiple branches, choose the order in which you want the stock checks to be sent to locations with sequential numbers.</td></tr>
<tr><td>8</td><td>Select Default Branch from dropdown and leave all other settings as shown and click Next Step.


</td></tr>
<tr><td>9</td><td>Validate Summary information and select Confirm Add Customer.</td></tr>
<tr><td></td><td>If prompted to Enable Catalogs, simply select Submit.</td></tr>
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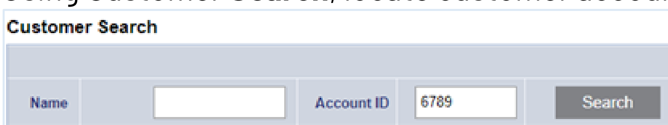
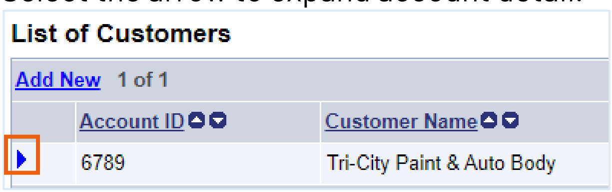
Editing Shops -NonCentralized A/R

To edit customer records for non-centralized accounts receivable, follow the steps below:

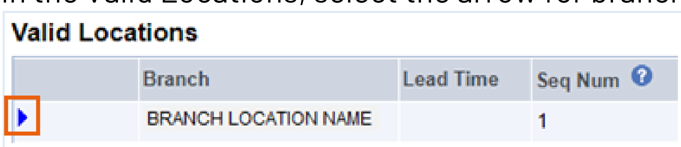
<table>
<tr><td>1</td><td>Using Customer Search, locate customer account.



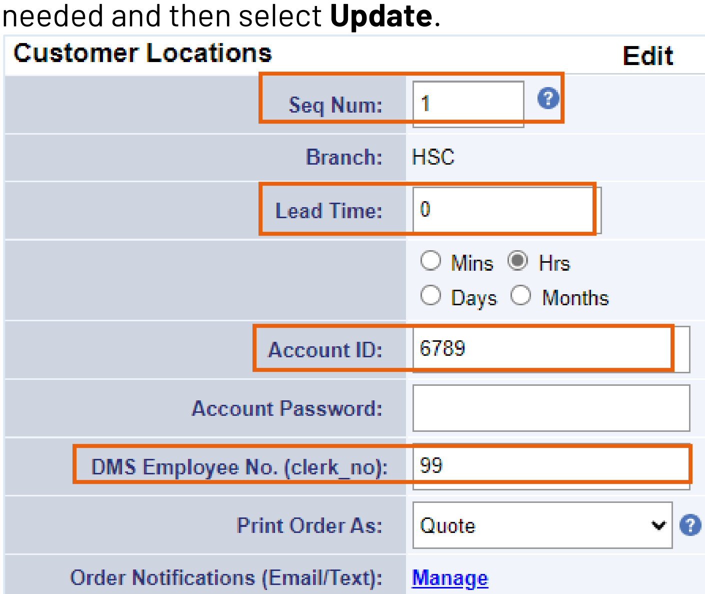
</td></tr>
<tr><td>2</td><td>Select the arrow to expand account detail.



</td></tr>
<tr><td>3</td><td>In the Valid Locations, select the arrow for branch to update.



</td></tr>
<tr><td>4</td><td>Update Sequence Number, Lead Time, DMS Account ID and Employee ID as needed and then select Update.



</td></tr>
<tr><td></td><td>Some Customer Maintenance activities will prompt a User Password reset; the password applies to WHI B2B activities only. If utilizing WHI B2B, document and provide the shop with updated password.</td></tr>
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