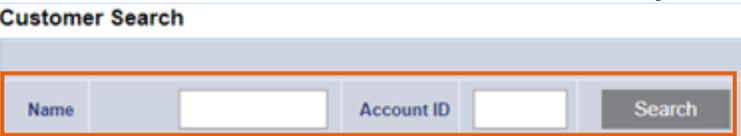


Nexpart - Customer Account Management

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

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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Nexpart - Customer Account Management, Continued

Step	Action
5	<p>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:</p> <ul style="list-style-type: none"> • 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. <div data-bbox="326 821 1284 1633" style="border: 1px solid black; padding: 5px;"> <p>New Customer Wizard Step 1 - Basic Customer Information</p> <p>Customer Name: Tri-City Paint & Auto Body</p> <p>Account ID: 6789</p> <p>Account Password: *Selected Systems Only</p> <p>N/A: 12345</p> <p>CCC Location Number: 12345</p> <p>Contact Name: Tri-City Paint & Auto Body</p> <p>E-mail:</p> <p>Address 1: 17777 Center Court</p> <p>Address 2:</p> <p>Phone:</p> <p>Country: USA</p> <p>Zip Code: 90703</p> <p>State: CA</p> <p>City: Cerritos</p> <p>Add above address as Customer Ship To: <input type="checkbox"/></p> <p>Fax:</p> <p>Type: Select Value</p> <p style="text-align: right; font-size: small;">Items in "red" are required.</p> <p style="text-align: right;">Next Step</p> </div>

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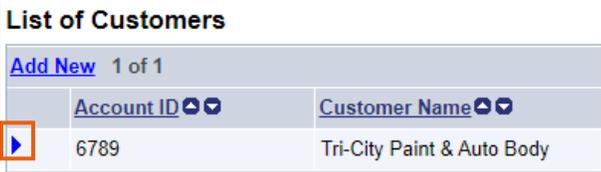
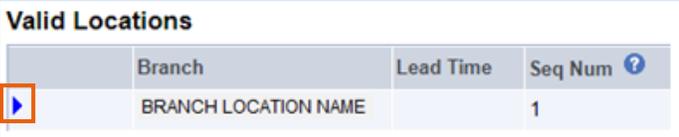
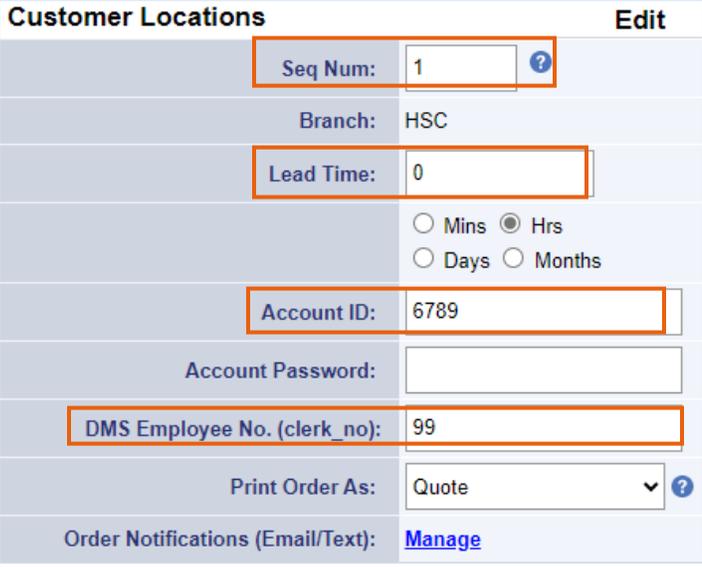
Step	Action																														
7	<p>Enter Sequence number (1-99) for Valid Branches and select Next Step.</p> <div data-bbox="326 499 1401 611" style="border: 1px solid #ccc; padding: 5px;"> <p style="font-size: small; margin: 0;">New Customer Wizard Step 2 - Valid Branches</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Sequence</th> <th style="width: 25%;">Lead Time</th> <th style="width: 25%;">View Only</th> <th style="width: 25%;">Branch Name</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input style="width: 80%;" type="text"/></td> <td style="text-align: center;"><input style="width: 80%;" type="text"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>1 : BRANCH LOCATION NAME</td> </tr> </tbody> </table> </div> <p> If multiple branches, choose the order in which you want the stock checks to be sent to locations with sequential numbers.</p>	Sequence	Lead Time	View Only	Branch Name	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input type="checkbox"/>	1 : BRANCH LOCATION NAME																						
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8	<p>Select Default Branch from dropdown and leave all other settings as shown and click Next Step.</p> <div data-bbox="326 890 1401 1461" style="border: 1px solid #ccc; padding: 5px;"> <p style="font-size: small; margin: 0;">New Customer Wizard Step 3 - Customer Options</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Default Order Type:</td> <td style="width: 20%;">Select Value</td> <td style="width: 40%; text-align: right;">▼</td> </tr> <tr> <td style="color: red;">Default Branch:</td> <td>Select Value</td> <td style="text-align: right;">▼</td> </tr> <tr> <td>Show Availability:</td> <td>Actual</td> <td style="text-align: right;">▼</td> </tr> <tr> <td>Import Parts List:</td> <td colspan="2" style="text-align: right;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Catalog Active:</td> <td colspan="2" style="text-align: right;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Summarize Other Branches:</td> <td colspan="2" style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td>Can Order Parts with Zero Quantity on Hand:</td> <td colspan="2" style="text-align: right;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Display Back Order Confirmation Message:</td> <td colspan="2" style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td>PO Required on All Orders:</td> <td colspan="2" style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td>Order History:</td> <td colspan="2" style="text-align: right;"><input checked="" type="checkbox"/></td> </tr> </table> <p style="font-size: x-small; text-align: right; margin-top: 5px;">Items in "red" are required.</p> <p style="text-align: right; margin-top: 5px;"><input style="border: 1px solid #ccc;" type="button" value="Next Step"/></p> </div>	Default Order Type:	Select Value	▼	Default Branch:	Select Value	▼	Show Availability:	Actual	▼	Import Parts List:	<input checked="" type="checkbox"/>		Catalog Active:	<input checked="" type="checkbox"/>		Summarize Other Branches:	<input type="checkbox"/>		Can Order Parts with Zero Quantity on Hand:	<input checked="" type="checkbox"/>		Display Back Order Confirmation Message:	<input type="checkbox"/>		PO Required on All Orders:	<input type="checkbox"/>		Order History:	<input checked="" type="checkbox"/>	
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9	<p>Validate Summary information and select Confirm Add Customer.</p>																														
	<p> If prompted to Enable Catalogs, simply select Submit.</p>																														

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Nexpart - Customer Account Management, Continued

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

-NonCentralized
A/R

1	<p>Using Customer Search, locate customer account.</p> 
2	<p>Select the arrow to expand account detail.</p> 
3	<p>In the Valid Locations, select the arrow for branch to update.</p> 
4	<p>Update Sequence Number, Lead Time, DMS Account ID and Employee ID as needed and then select Update.</p> 
	<p>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.</p>