# Customer entities

# Entities

- Customers
- Customer Groups
- Customer Users
- Customer User Roles
- Customer Visitor

*Demonstration >>>*
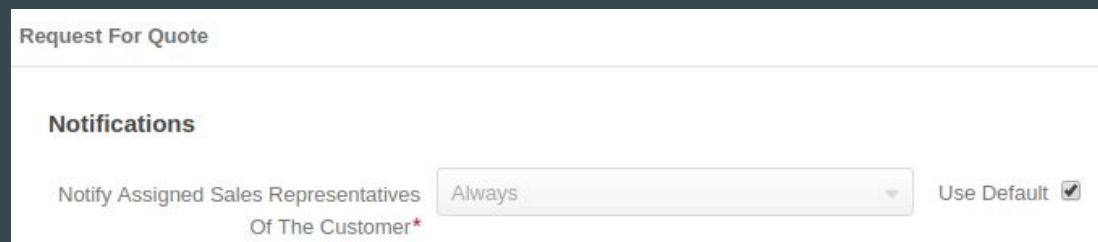
# Customers

- Represent company or division who buys your products using OroCommerce storefront
- Hierarchy
  - Parent-child relation
  - Aggregates information from its children (monitoring and controlling divisions activities)
  - Use cases: storefront ACL, reports, expression rules
- Addresses
  - Billing, shipping
  - GoogleMap

# Customers

- Addresses
  - Can be managed on both backend & storefront
- Sales representatives
  - Support the Customer's company purchase process
  - Real case: Notify Customer's Sales Reps [link]

**Request For Quote**

**Notifications**

Notify Assigned Sales Representatives Of The Customer* | Always ▾ | Use Default ☑

- Import & Export enabled

*Demonstration >>>*

# Customer Groups

- Companies may be organized into groups to simplify sharing various options
  - configuration, payment and tax-related settings, price lists among multiple customers
- Usually represents sales groups, pricing groups or customer segments
- Assigned to customer

*Demonstration >>>*

# Customer User

- Actual person (acts on behalf of the company)
- Assigned to Customer
- May have a limited set of permissions
  - depending on their function in the customer organization
- Email is unique for registered users
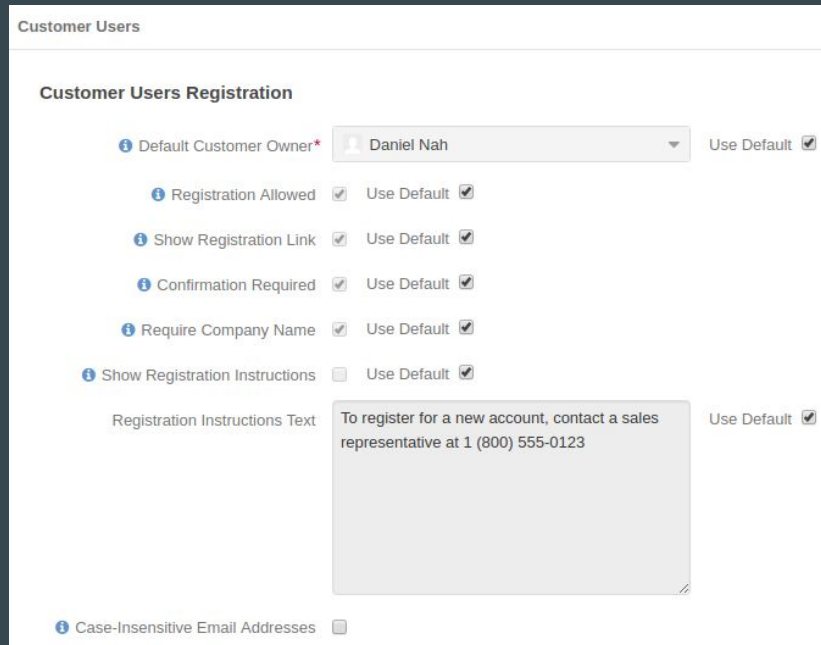- Import & Export enabled

# Customer User

- Addresses
  - Billing, shipping
  - GoogleMap
  - Can be managed on both backend & storefront
- Sales representatives
  - Support the Customer User's purchase process
  - Real case: Notify Customer User's Sales Reps [link]

*Demonstration >>>*

# Customer User registration

- Can be <u>disabled</u>
- Confirmation is optional
- Behaviour is configurable



*Demonstration >>>*

# Customer User Role

- Grants permissions
  - Only for storefront
- Customer user might have several roles
- Can be managed either from backend or storefront
- Flags
  - Self-managed (can CRUD/copy role)
  - public/system (can see role)
  - predefined/customizable (association to Customer)

*Demonstration >>>*

# Customer Visitor

- Represents anonymous user [docs]
- Stores latest visit date and session ID
- Has relation to Shopping List
  - Useful for Guest shopping list feature (if enabled)
- Has relation to Customer User
  - Useful for Guest checkout feature (if enabled)
  - Flag "is_guest" = true [docs]

# Storefront Security

- Similar to backend permissions
  - group_name: "commerce"
- Entity and action based permissions
- Defined by current roles
- Anonymous users have their own Customer User Role and Customer Group

*Demonstration code + UI >>>*

# Storefront Ownership

- Similar to backend ownership
- Separate config options
- Owner types
  - Customer
  - Customer User
- Access levels of permissions
  - User == Customer User == BASIC
  - Department == Customer == LOCAL
  - Corporate == Division == DEEP

# Storefront Ownership Access Levels

## Back Office

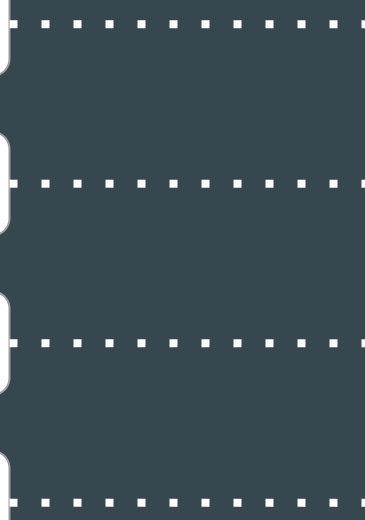| Back Office | Storefront |
|---|---|
| Global | |
| Organization | |
| Division | Corporate |
| Business Unit | Department |
| User | User |
| None | None |

# Best Practices

- Customers and Customer Groups can be used to represent many types of hierarchical relations
- Customer Groups can be used to represent statuses. For example, there may be Bronze Status, Silver Status and Gold Status customers and each should have its own discounts
- Customers can be used to represent specific scope of work. For example, there may be a new customer for each project and each project may have its own prices
- Customer hierarchy can be used to represent departments and sub-departments