

Customer entities

Entities

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

Demonstration >>>

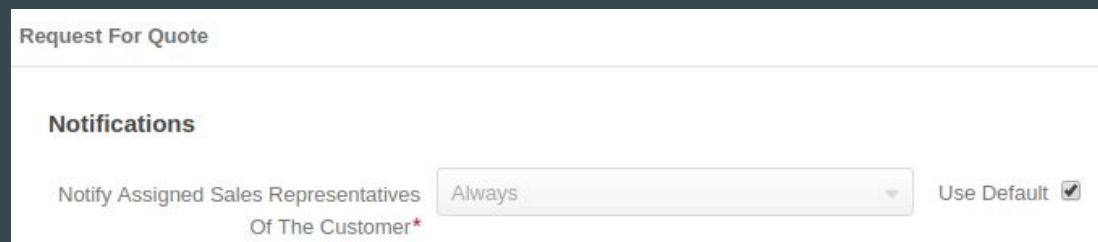
[\[User guide\]](#)

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 [\[link\]](#)



The screenshot shows a web form titled "Request For Quote". Below the title is a section labeled "Notifications". Inside this section, there is a label "Notify Assigned Sales Representatives Of The Customer*" followed by a dropdown menu currently set to "Always". To the right of the dropdown is a checkbox labeled "Use Default" which is checked.

- 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

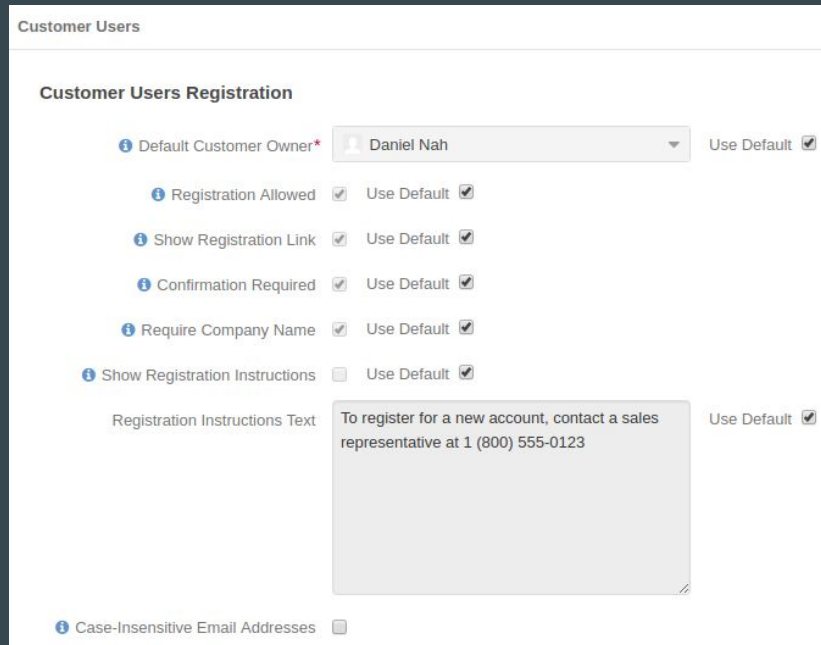
Customer User

- 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 disabled
- Confirmation is optional
- Behaviour is configurable



The screenshot shows a configuration page titled "Customer Users" with a sub-section "Customer Users Registration". It contains several settings, each with an information icon, a label, a value field, and a "Use Default" checkbox.

Setting	Value	Use Default
Default Customer Owner*	Daniel Nah	<input checked="" type="checkbox"/>
Registration Allowed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Show Registration Link	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Confirmation Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Require Company Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Show Registration Instructions	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Registration Instructions Text	To register for a new account, contact a sales representative at 1 (800) 555-0123	<input checked="" type="checkbox"/>
Case-Insensitive Email Addresses	<input type="checkbox"/>	

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

Storefront

Global

Organization

Division

Business Unit

User

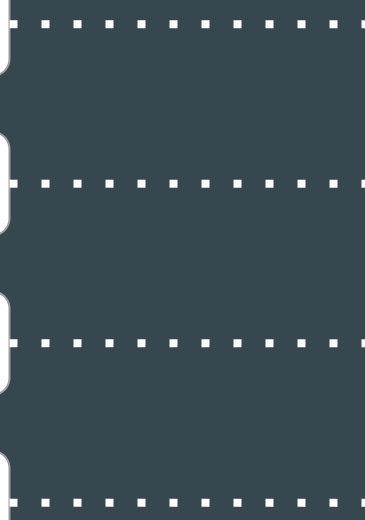
None

Corporate

Department

User

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