Admin User Guide – Accounts

[] Getting Started

Accessing the Accounts Console [#Accessing]

Overview

The Accounts microservice ("Accounts") allows Accounts Admin [#AccountsAdmin] /Accounts Rep [#AccountsRep] to create and manage Business to Business (B2B) accounts for its clients.

For a detailed overview of the **Accounts** microservice, see the Accounts Microservice Overview [https://developer.skava.com/microservices/accounts/] .

Service Glossary

- **[] Accounts Admin** – creates a new account, approves an account, updates the information of an existing account, assigns an account rep, creates a contract for an account, manages orders of an account – owns the complete account management of the seller organization.
- **[] Accounts Rep** – updates information of an existing account, creates and manages contracts for an account, manages orders of an account.
- **[] Attributes** – properties that define an account appears in the Storefront. For example, activation date, business category, secondary contact email ID, etc.
- **[] Contract** – This is a legally-binding agreement (in doc, docx, or pdf format) between buyer and seller org containing business relationship in terms of payment term, account, credit limit, catalog, and price information. Every contract has an end date after which it becomes invalid.
- **Customer**– a business consumer or buyer on the Business' B2B storefront.
- **Price Lists** – a container or wrapper entity to hold the prices of multiple **stock keeping units** (SKUs) available for sale to a consumer or buyer.
- **Pricing Manager** – creates and edits price lists, approves and denies data submitted by **pricing editors**, and manages currency and price types used by a **price list**.
- **Product** – a good, service, or idea that has a combination of tangible and intangible attributes and can have multiple variants which are referred to as **stock keeping units** (SKUs). In Skava Commerce, the consumer/buyer evaluates a product (for example, a men's dress shoe available in black and brown and in sizes from 10 to 15), but actually purchases a SKU associated with the product (for example, a black colored version of the dress shoe in size 12) rather than the product itself.

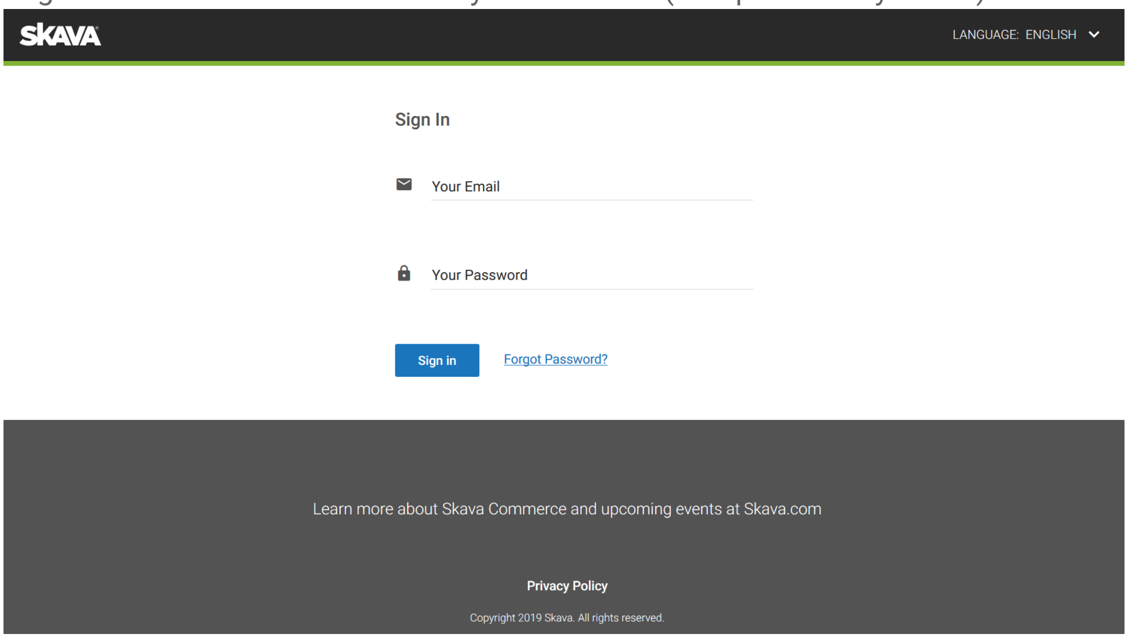
- **Stock Keeping Unit** (SKU) – a particular variant of a **product** which is available for purchase by a consumer/buyer.
- **Store** – represents a specific physical location or online store of a **business**.
- **Storefront** – a consumer-facing website that presents products, content, and promotions across multiple channels such as desktop, tablet, and mobile.

Accessing the Accounts Console

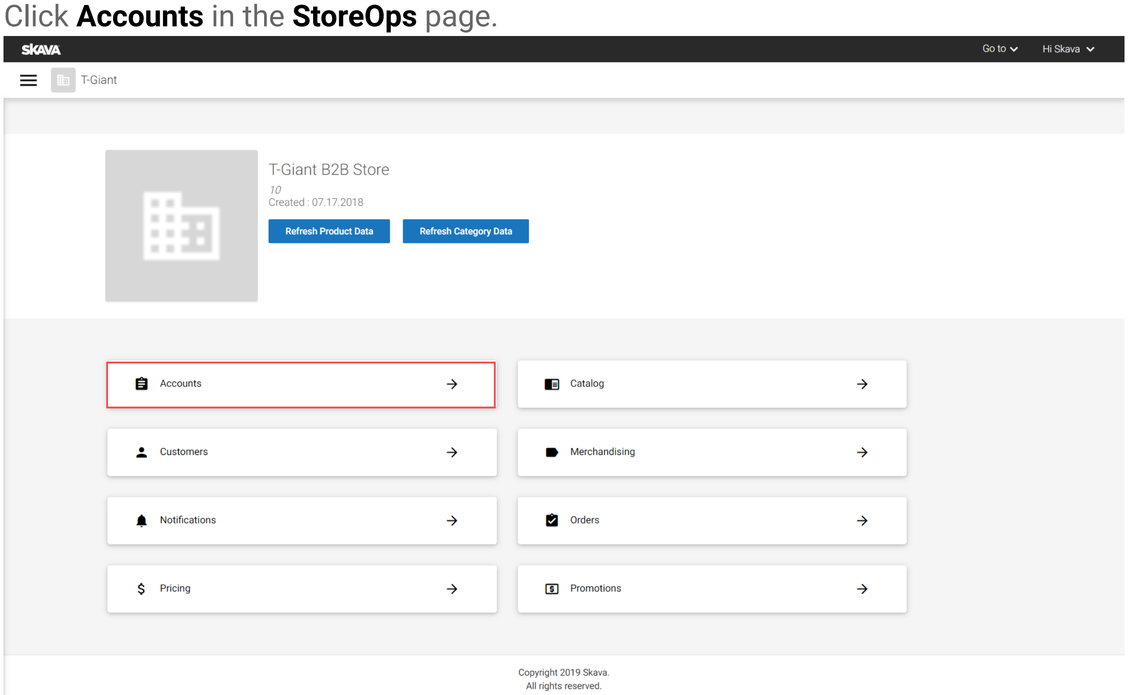
Getting Started [#GettingStarted] | All Accounts Page [#AccountsPage]

To access the Accounts console,

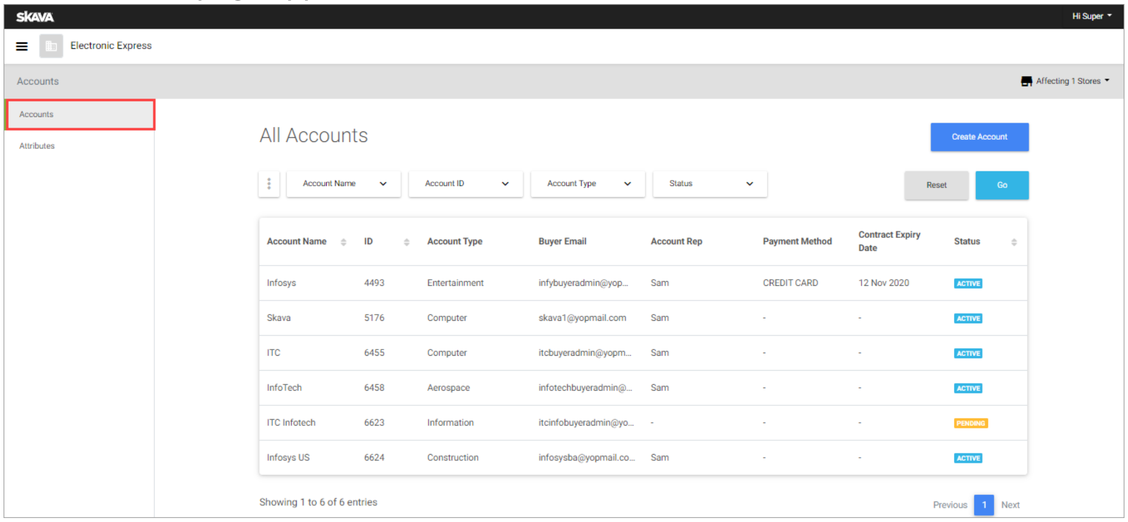
1. Log in to the **Foundation** server for your **business** (URL provided by Skava).



2. Click **Accounts** in the **StoreOps** page.



The **Accounts** page appears:



[] All Accounts Page

[Accessing the Accounts Console [#Accessing]] | [All Attributes Page [#AttributesTab]]

In the **All Accounts** home page, you can manage:

- **Accounts:** Using the **Accounts** tab, you can create and manage all the accounts.
- **Attributes:** Using the **Attributes** tab, you can define and manage the account attributes.

Accounts Tab Overview

In the **Accounts** tab, you can:

- search for accounts [#SearchParam]
- create a new account [#CreateAccount]
- view or edit the existing accounts [#EditAccount]

Note:

- You can sort the account by account name, type, ID, and/or status by ascending/descending order.
- Pagination option displays the number of pages that contain account information.
- You can navigate the subsequent pages using the **Next** button.
- By default, 10 rows per screen will be displayed.

[] Configuring Search Parameters

In the **Accounts** page, you can search for accounts and modify the search fields as needed.

Searching for Accounts

To search the accounts,

1. Click the **Account Name**, **Account ID**, **Account Type**, and/or **Status**, drop-down list in the header to open an **entry field** to provide search criteria.
2. Enter the desired search criteria in the search field, and then click the **Go** button.
   Note: To reset the search field in the header, click the **Reset** button.

The search result is displayed.

Modifying Searchable Fields

To modify the searchable fields,

1. Click available at the beginning of the search field.
2. Select or deselect the items to add or remove the searchable fields in the header. The selected searchable fields appear in the header:

Note: To reset the search field in the header, click the **Reset** button.

[] Creating a New Account

To create a new account,

1. In the **Accounts** home page, click the **Create Account** button. The **Create Account** page appears:

2. In the **Create Account** page, enter or select the required information:

Field	Description
Account Name*	Enter the buyer's organization name.
Buyer Email Address*	Enter the buyer admin's email address.
First Name*	Enter the buyer admin's first name.
Last Name*	Enter the buyer admin's last name.
Account Type*	Select the applicable account type. A Business Admin can configure the account type in the collection to allow the clients to segment their buyers (for example, Agriculture, Hospital, Computer, etc.) for promotional and other purposes.
Account Size*	Select the buyer's company size (reflects the possible number of shoppers from the buyer).
Address*	Enter the buyer's street address.
City*	Enter the buyer's city.
State*	Enter the buyer's state.
Country*	Enter the buyer's country.
Zip Code*	Enter the buyer's zip code.
DUNS Number	Enter the Dun and Bradstreet's unique nine-digit identifier for the buyer.
Tax ID*	Enter the buyer's tax identification number.
Contact Number*	Enter the buyer's contact number.

Note: The asterisk (*) symbol indicates mandatory fields.

3. [] In the **Attributes** section, select the appropriate **Attributes** for the account.
   Note:
   You can select the attributes available within the collection. For information on how to create attributes, see Creating an Attribute [#CreateAttributes] .
   You can delete optional attributes using the **Delete** icon.
4. Click the **Save** button. The newly created account appears in the **Accounts** page.
   Note: To discard the changes, click **Cancel**.

[] Viewing or Editing an Account

After creating an account, an Accounts admin [#AccountsAdmin] can update the account details and assign the account to an accounts rep [#AccountsRep] in the account details page. In the **Accounts** page, click on a particular account, and view and edit account details. The account detail page has the following tabs:

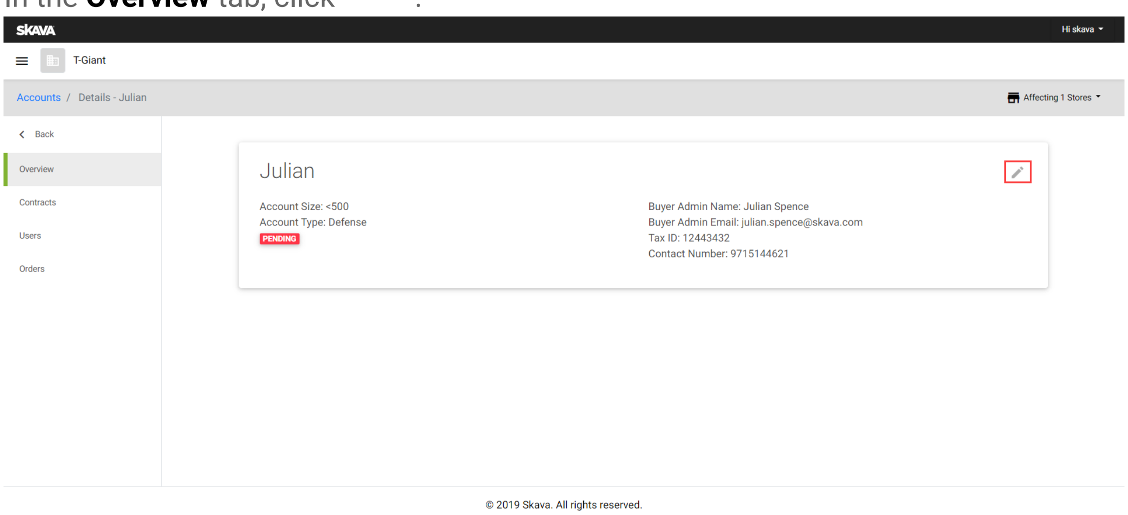
- **Overview** [#OverviewTab]
- **Contracts** [#ContractTab]
- **Users** [#UsersTab]
- **Orders** [#OrdersTab]

[] Overview Tab

In the **Overview** tab, you can view and edit the account details. You can add attributes when editing or updating the account. The updated account details appear under the **Overview** tab.

[] To edit an account detail,

1. In the **Overview** tab, click  .



2. Update the following fields as required:

The following table provides the field description for updating the account information:

Field	Description
Account Name*	Update the buyer's organization name.
Tax ID*	Update the buyer's tax identification number
DUNS number	Update the Dun and Bradstreet's unique nine-digit identifier for the buyer.
Buyer Admin Name*	Update the buyer admin's name.
Buyer Email Address*	Update the buyer admin's email address.
Contact Number*	Update the buyer's contact number.
Address*	Update the buyer's street address.
City*	Update the buyer's city.
State*	Update the buyer's state.
Country*	Update the buyer's country.
Zip Code*	Update the buyer's zip code.
Account Size*	Select the buyer's company size (reflects the possible number of shoppers from the buyer).
Account Type*	Select the applicable account type. For example, Agriculture, Hospital, Computer, etc.
Account Rep*	Select the account rep from the drop-down list. Only the Accounts admin [#AccountsAdmin] can assign an accounts rep

	[#AccountsRep] .
Status*	Select the appropriate account status from the drop-down list. By default, the account is created with pending status. The possible statuses are: • **Active** – the account is active and the products can be sold. • **Close** – the contract has been expired and the account is closed. • **Inactive** – the seller and buyer are no longer doing business and no purchase can be made. • **Pending** – the account has not been fully activated and no purchase can be made (the default status). • **Reject** – the account request can be rejected if the buyer organization does not meet terms and conditions. • **Suspended** – the account payment is overdue from the buyer and no purchase can be made while the account is in suspended status.
Comments*	Comments field appears when the status is updated. Add comments in the **Comments** field.

Note: The asterisk (*) symbol indicates mandatory fields.

3. [] Select or deselect the attributes from the **Add Attributes** drop-down list. For information on how to create or select attributes, see Creating an Attribute [#CreateAttributes] .
4. Click the **Save** button. The updated account details appear under the **Overview** tab. **Note:** To discard the changes, click **Cancel**.

[] The selected attributes for an account appear in the storefront of the account as shown below:

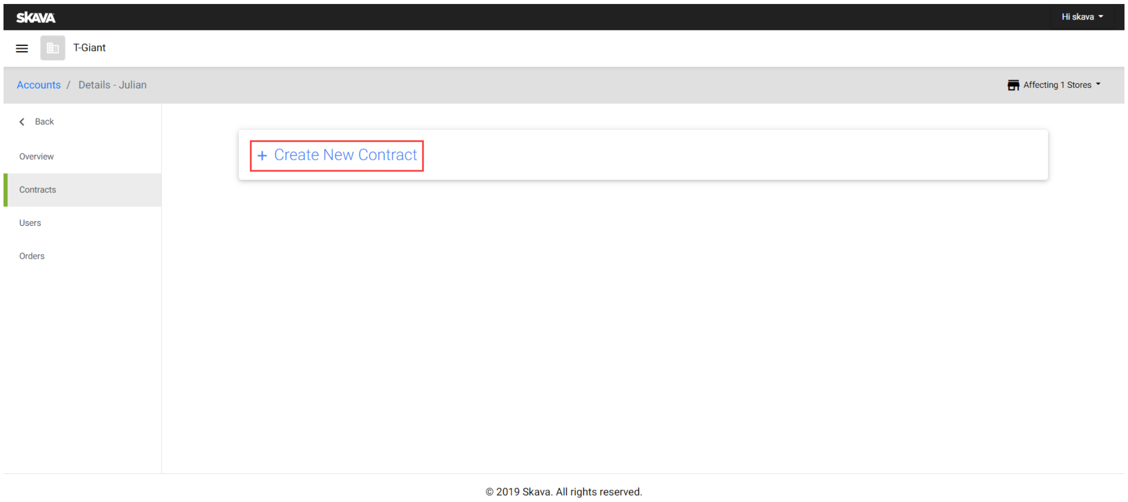
[] Contracts Tab

In the **Contracts** tab, you can create and view or edit contract details of an account.

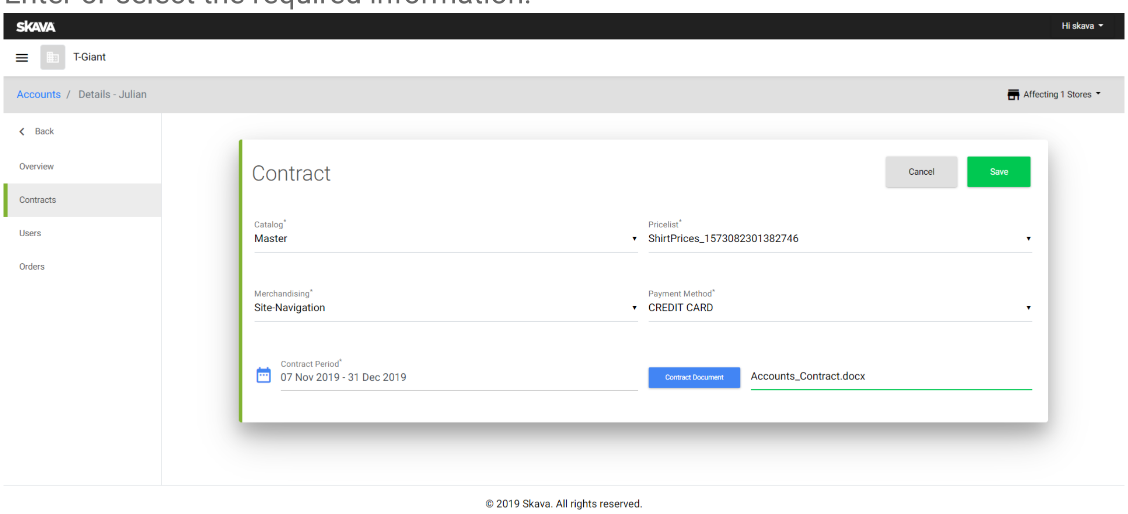
Creating a Contract

To create a contract,

1. In the account detail page, click the **Contracts** tab in the left panel.
2. Click **Create New Contract**.



3. Enter or select the required information:



The following table provides the field description for creating a contract:

Field	Description
Catalog*	Select an appropriate catalog from the drop-down option.
Pricelist*	Select an appropriate price list from the drop-down option.
Merchandising*	Associate the merchandising site navigation from the drop-down option.
Payment Method*	Select payment method options (for example, PO, Credit Card,

	etc.), which was configured by a business admin.
Contract Document	Browse or drag and drop an electronic version of the buyer and seller contract (one at a time) from a local drive. Multiple contract documents can be added to a contract.
Contract Period*	Select the start date and end date of the contract. The status of the contract(s) will be updated automatically based on the contract period. The status will be updated to: • **Active** – when the contract period is valid. By default, the contract will be created with the Active status. • **Expired** – when the contract period is expired. • **Pending** – when the contract period is yet to be on live.

Note: The asterisk (*) symbol indicates mandatory fields.

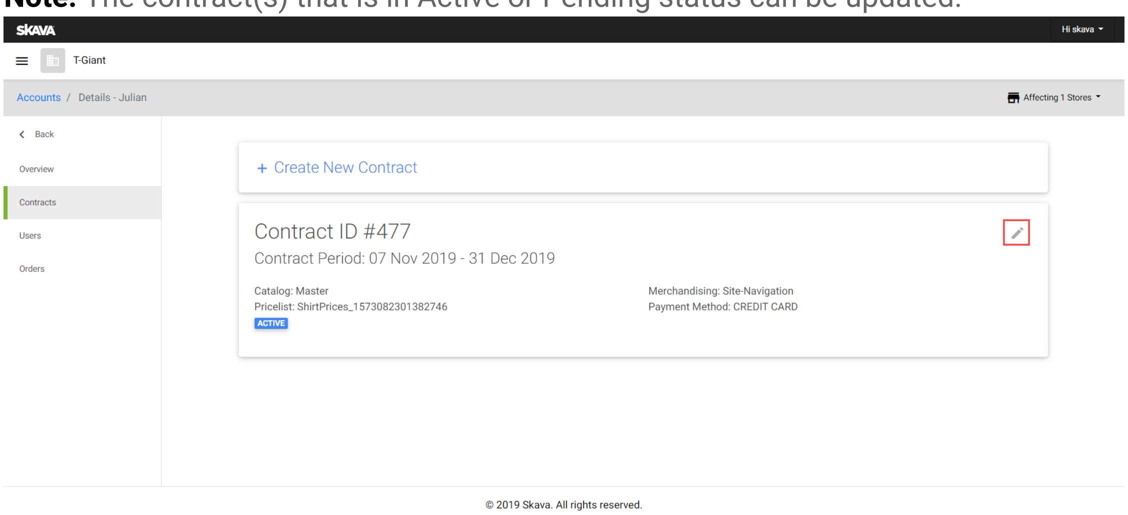
4. Click the **Save** button. The newly created contract appears under the **Contract** tab.
   Note:
   - You can upload multiple contracts for an account by following the above procedure. The contract validity of the contracts should not overlap.
   - To discard the changes, click **Cancel**.

Viewing or Editing a Contract

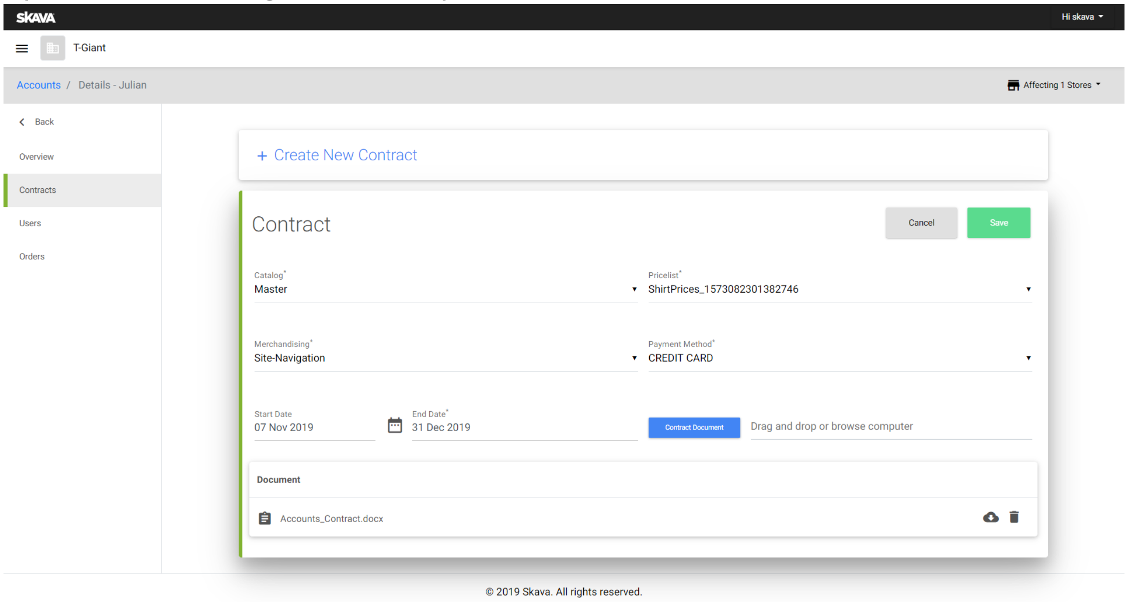
To view or edit contract details,

1. In the account detail page, click the **Contracts** tab in the left panel.
   The contracts that are added to an account appears.

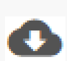
2. Click  on the desired contract to edit.
   Note: The contract(s) that is in Active or Pending status can be updated.



3. Update the following fields as required:



The following table provides the field description to edit a contract:

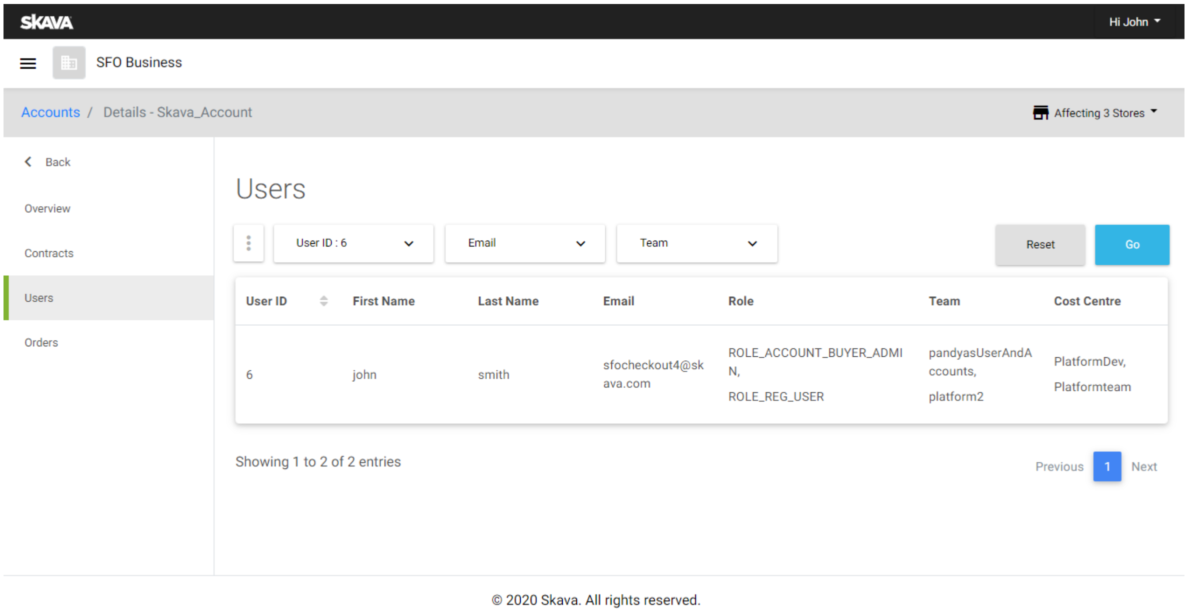
Field	**Description**
Catalog*	Update an appropriate catalog from the drop-down option.
Pricelist*	Update an appropriate price list from the drop-down option.
Merchandising*	Update the merchandising site navigation from the drop-down option.
Payment Method*	Update payment method options (for example, PO, Credit Card, etc.), which was configured by a business admin.
Start Date*	Select the start date of the contract from the calendar. It can be updated only for the contract that is in the Pending status.
End Date*	Select the end date of the contract from the calendar. It can be updated only for the contract that is in the Active or Pending status.
Contract Document	If required, browse or drag and drop an electronic version of the buyer and seller contract (one at a time) from a local drive.
Document	Click: •  to download the contract to the local computer and view it. •  to delete the contract.

Note: The asterisk (*) symbol indicates mandatory fields.

4. Click the **Save** button. The updated contract appears under the **Contracts** tab.
   Note: To discard the changes, click **Cancel**.

[] Users Tab

A user can be associated with single or multiple roles, teams, and/or cost centers.



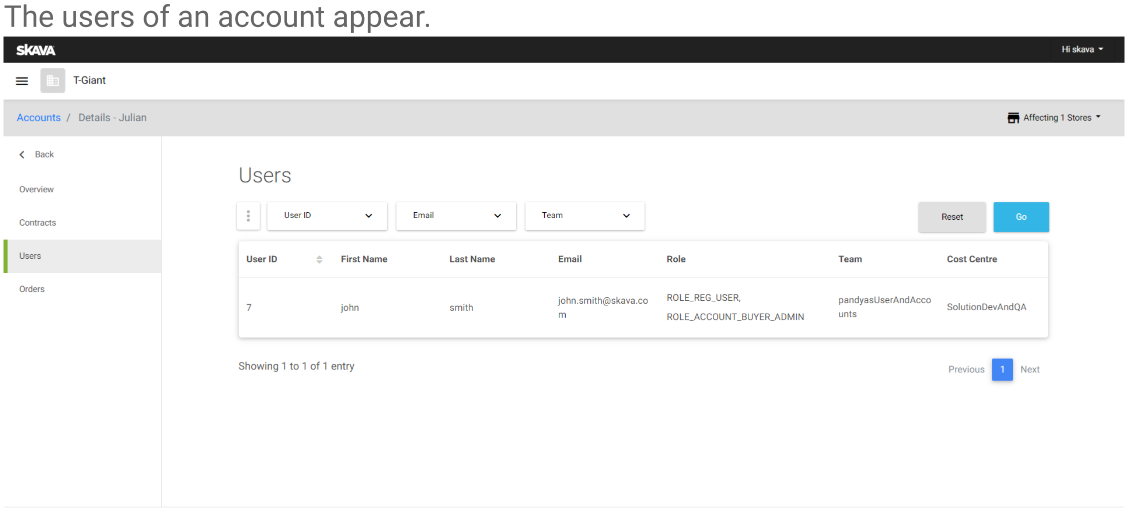
In the **Users** tab, you can:

- view the users of the account [#ViewUsers]
- search for users [#SearchUsers] by user ID, email address of the user, or team name

[] Viewing Users

To view users,

1. In the account detail page, click the **Users** tab in the left panel.
   The users of an account appear.



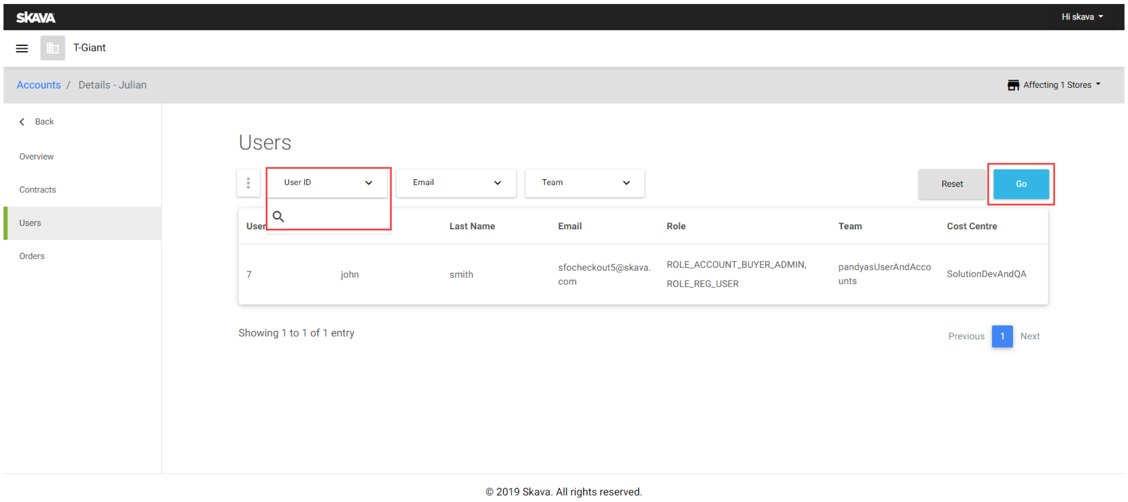
Note: By default, 10 rows per screen will be displayed.

2. Click on the desired user and you will be redirected to the [Customers [https://developer.skava.com/microservices/customers/customers-admin-user-guide/]] console.

[] Searching for Users

To search for users,

1. Click the drop-down option on the **Email ID** or **Team Name** to provide the search criteria.
2. Enter the desired search data, and then click the **Go** button.
   Note: To reset the search field in the header, click the **Reset** button.



[] Orders Tab

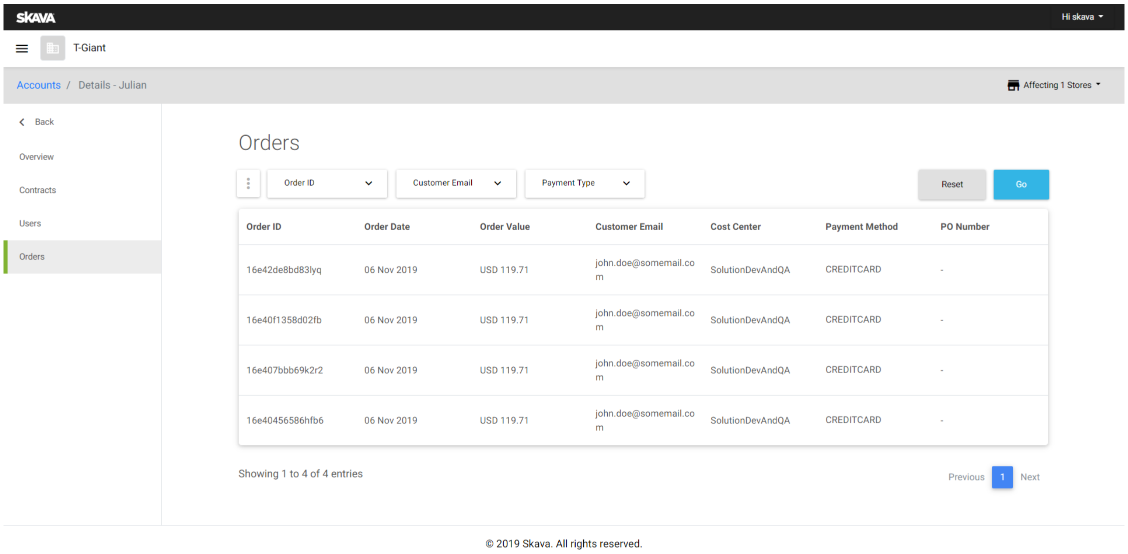
In the **Orders** tab, you can:

- view orders of an account [#ViewOrders]
- search for orders [#SearchOrders]

[] Viewing Orders

To view orders,

1. In the account detail page, click the **Orders** tab in the left panel.
   The orders of an account appear.



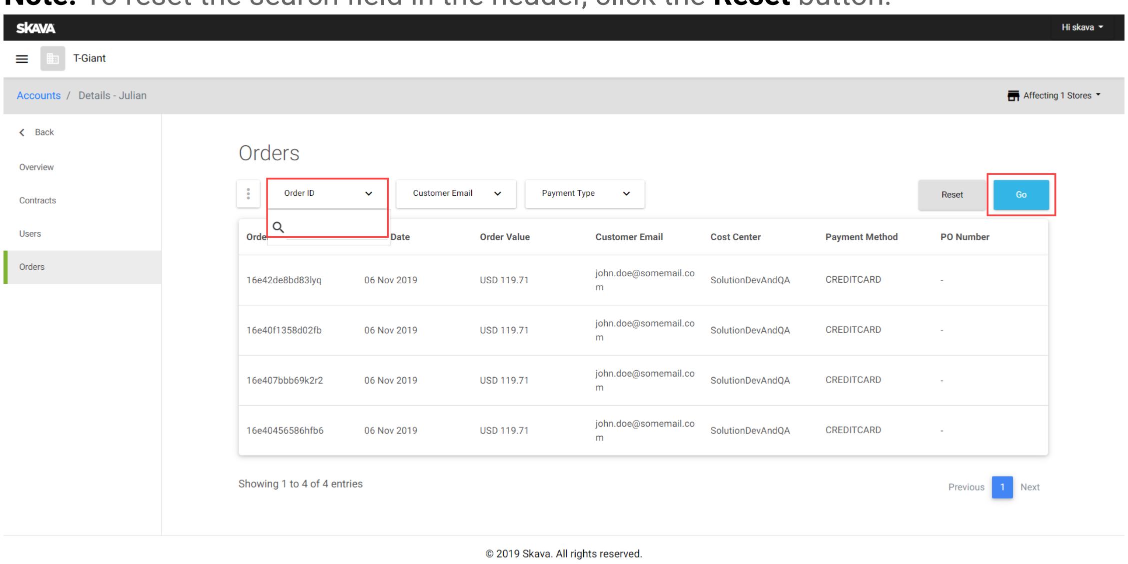
Note: By default, 10 rows per screen will be displayed.

2. Click on the desired order and you will be redirected to the Orders [https://developer.skava.com/microservices/order/order-admin-user-guide/] console.

[] Searching for Orders

To search for orders:

1. Click the drop-down option on the **Order ID** or **Date Range** to provide the search criteria.
2. Enter the desired search data, and then click the **Go** button.
Note: To reset the search field in the header, click the **Reset** button.



[] All Attributes Page

All Accounts Page [#AccountsPage] | Revision History [#RevisionHistory]

Attributes are properties that define an account. You can define custom attributes and select the custom attributes [#SelectAttributes] when creating an account

[#CreateAccount] .

Custom-defined attributes can be mandatory or optional. Optional attributes can be added to accounts using **Add Attributes** [#AddAttributes] when editing an account [#EditAccount] .

The field type for an attribute can be Boolean, Date, Decimal, Email, List, Multiple List, Number, or String.

Here are a few examples of custom-defined attributes:

- Bundle Applicable
- Activation Date
- Rating
- Secondary Contact (Email)
- Business Category
- Tier
- Multiple Payment Methods

In the **All Attributes** page, you can perform the following:

- Search for Attributes [#SearchAttributes]
- Create Attributes [#CreateAttributes]
- View or Edit Attributes [#ViewEditAttributes]

Attributes Tab Overview

You can view the list of attributes in the **Attributes** tab. You can create and edit attributes to display in the storefront. For more information, see the Storefront view of attributes [#StorefrontView] .

Configuring Attribute Search Parameters

In the **All Attributes** page, you can search for attributes based on attribute **name**, **ID**, **Type**, **Field Type**, **Required** and/or **Status**.

[] Searching for Attributes

To search the attributes,

1. In the search header, select the **Attribute ID**, **Attribute Name**, **Type**, **Field Type**, **Required**, and/or **Status** drop-down list. The entry text-box for the selected field is displayed.

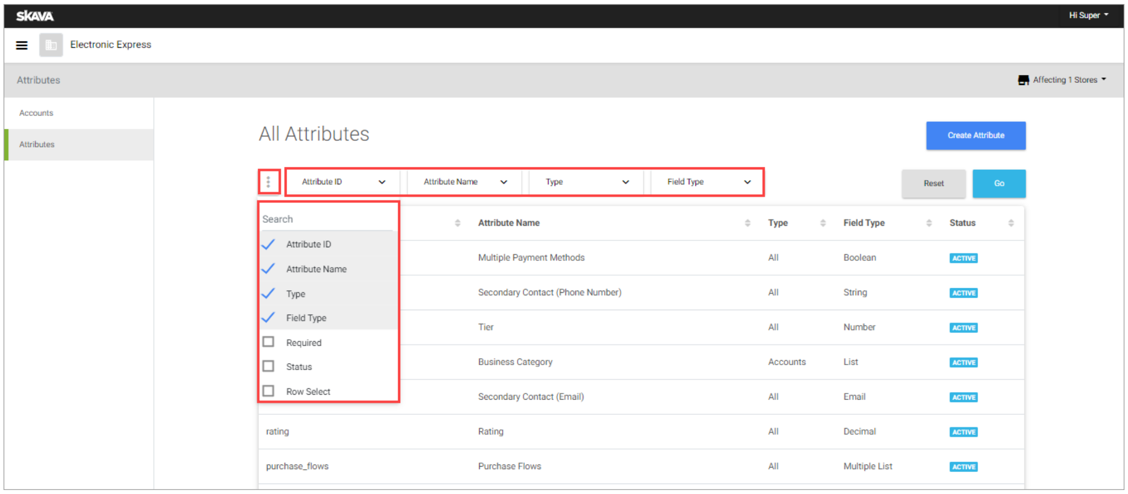
2. Enter the search criteria in the entry text-box and then Click **Go**. The search result is displayed.

Note: If you want to reset the search header, click **Reset**.

Modifying Attribute Searchable Fields

To modify the searchable fields,

1. In the **All Attributes** page, click the ellipsis on the search header. The list of fields to select is displayed.
2. Select or deselect the checkbox next to the field you want to include. The selected fields are displayed in the search header.



Note: To reset the search field in the header, click the **Reset** button.

[] Creating an Attribute

1. In the **All Accounts** page, click the Attributes tab. The **All Attributes** page is displayed.

2. Click **Create Attribute** button. The **Attribute Create** page is displayed.

3. Enter or select the field information.
   The following table provides the field description for creating an attribute:

Attribute Name	Enter an attribute name.

Attribute ID	Enter an attribute ID.
Type	Select one of the following types from the drop-down list: • **All:** Select this to map the attribute to accounts, contracts, teams, and cost centers. • **Accounts:** Select this to map the attribute only to Accounts. • **Contracts:** Select this to map the attribute only to Contracts. • **Teams:** Select this to map the attribute only to Teams. • **Cost Centers:** Select this to map the attribute only to Cost Centers.
Status	Select one of the appropriate statuses from the drop-down list: • **Active:** Select this to mark the attribute as active. Indicates the active status of the attribute. • **Inactive:** Select this to mark the attribute as inactive. Indicates the inactive status of the attribute.
Field Type	Select one of the field types from the drop-down list: • **Boolean:** Select this to provide one of two possible values for the attribute. • **Date:** Select this to provide date format values. • **Decimal:** Select this to include exact numeric values for the attribute. • **Email:** Select this to include email values for the attribute. • **List:** Select this to provide a list of values to select from. • **Multiple List:** Select this to include multiple list values. • **Number:** Select this to include number values. • **String:** Select this to include string values.
Required	Select one of the following from the required drop-down list: • **No:** Select this if the attribute is optional. • **Yes:** Select this if the attribute is mandatory.

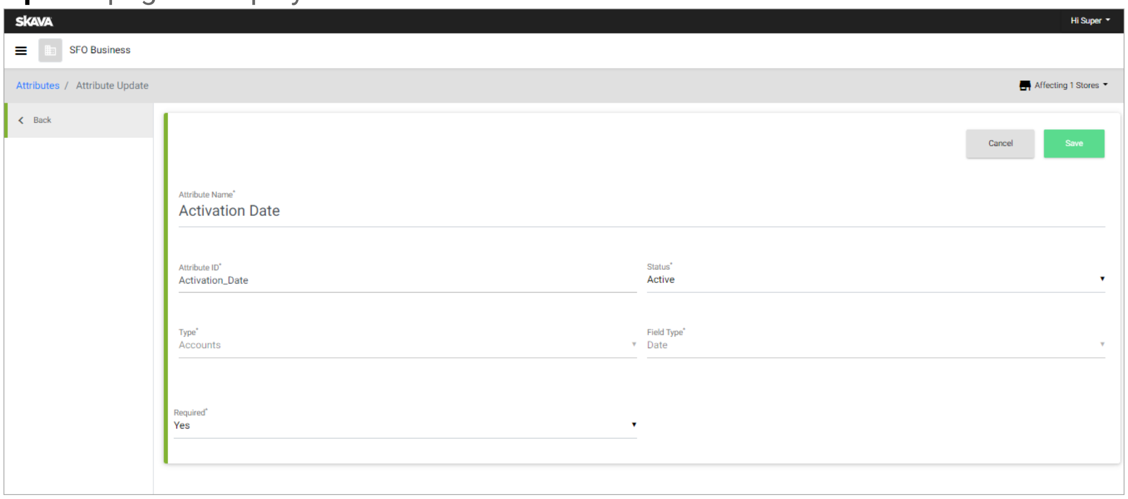
4. Click **Save**. The new attribute is added to the attribute list.

[] Viewing or Editing an Attribute

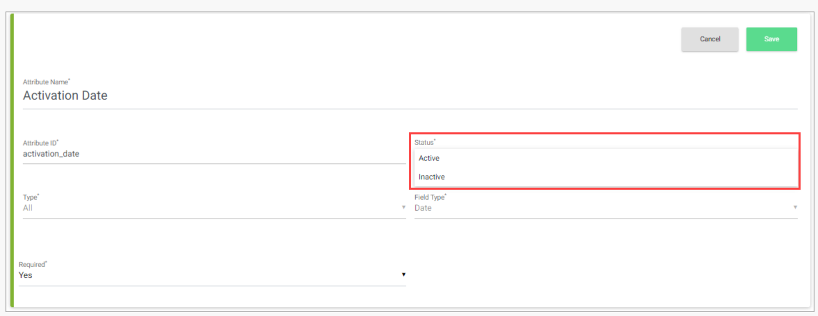
You can view the list of available attributes in the All Attributes page.

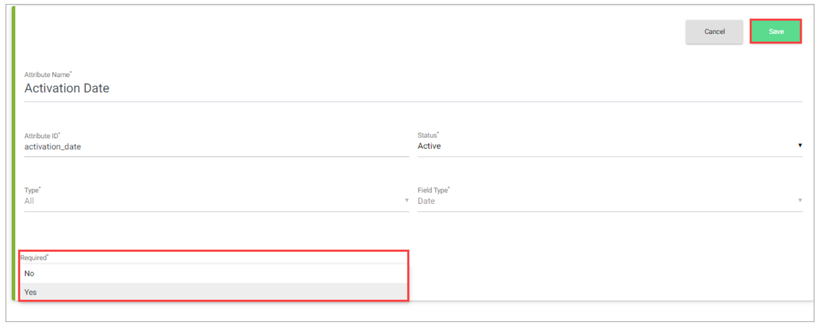
To view or edit an attribute,

1. In the **All Attributes,** click the attribute you want to view or edit. The **Attribute Update** page is displayed with the attribute details.



2. Edit the field information.

Field	Description
Name	Edit the name of the attribute.
Status	Edit the status of the attribute. You can set the status to **active** or **inactive**. 
Required	Edit the required option as **Yes** or **No**.



3. Click **Save**. The attribute details are updated.
   Note: You can edit only the **Name**, **Status,** and **Required** fields.

All Attributes Page [#AttributesPage] | top [#top]

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Revision History

2020-06-29| HM – Updated for Release 8.9.0.
2020-05-04| JP – Updated for Release 8.8.0.
2020-03-27| AM – Minor copyedit.
2019-11-18 | AM – Revamped this document.
2019-09-24 | AM – Content updated for September 2019 release.
2019-07-16 | AN – Content updated for July 2019 release.
2019-06-08 | PLK – Minor copyedits.
2019-05-08 | JP – Minor copyedits.
2019-05-04 | PLK – Updated links.
2019-01-21 | PLK – Content uploaded