

Understanding the Invitation Emails in the Purchasing Groups (Customer Groups) Section of your Order Management System

Once Masters and Groups are created, Members must be added to the Groups. This can happen in one of a few ways. The merchant can modify the customer records in the OMS of those who are to be Members, either *designating* them as Members, or *inviting* them to be Members. Also, Masters can *invite* other customers to be Members, but unless they have access to the Nexternal Order Management System, they cannot *designate* them as Members. When a customer is invited to be a Group Member (subcustomer), the invitee may either accept or reject the invitation.

This document focuses on the invitation emails initiated when a customer is invited to be a Group Member. (For more detailed information regarding creation of Masters, Groups and Members, please see the “Purchasing Group Overview (Customer Groups)” in the Training Center.)

When you or a Master Customer invite another customer to become a Group Member (which automatically makes that person a Pending Member until they either accept or reject the invitation), an Invite E-Mail is sent to the invited customer. When that customer responds to the invitation, a Response E-Mail is sent to the Master Customer.

Here is an example of the default invitation email:

Dear Tony Jones,

Susan Miller has invited you to join the Group Purchasing Dept. in the ABC Company Online Store, in the Role of Requisitioner.

Please click <http://store.nexternal.com/abcco/storefront/account.aspx?GroupAction=Accept> to Accept or click <http://store.nexternal.com/abcco/storefront/account.aspx?GroupAction=Decline> to Decline.

Thank you!

ABC Company

<http://www.abcco.com>

111-111-1111

susan.miller@abcco.com

Here is an example of the default response email:

Dear Susan Miller,

Tony Jones (ABC Co) has Accepted your invitation to become a Requisitioner in Group Purchasing Dept. in the ABC Company Online Store.

If you wish to see your Group, please log in
at <http://store.nexternal.com/abcco/login.aspx?Target=account.aspx>

*Remember to send test Invite and Response emails to yourself, via the **Send Test Invite E-Mail** and **Send Test Response E-Mail** buttons in the OMS, to see exactly how these default emails will read in your system.*

You may customize both of these emails if you wish in the Invitation E-Mails section (Customers/Preferences/Customer Group Preferences). You may specify the **Format**, **Subject**, and **Body** of those emails in the fields provided. In the Subject and Body fields, you may include the following Personalization Terms, which are replaced with the corresponding value:

- INVITE_FIRST_NAME: the First Name of the invited customer.
- INVITE_LAST_NAME: the Last Name of the invited customer
- IF_INVITE_HAS_COMPANY(A): includes A in the e-mail if the invited customer has a Company Name.
- INVITE_COMPANY_NAME: the Company Name of the invited customer
- INVITE_EMAIL: the E-Mail Address of the invited customer.
- MASTER_FIRST_NAME: the Master Customer's First Name.
- MASTER_LAST_NAME: the Master Customer's Last Name.
- IF_MASTER_HAS_COMPANY(A): includes A in the e-mail if the Master Customer has a Company Name.
- MASTER_COMPANY_NAME: the Master Customer's Company Name.
- MASTER_EMAIL: the Master Customer's E-Mail Address.
- ROLE: the role (Approver or Requisitioner) that the customer has been invited to take in the Group.
- GROUP_NAME: the name of the Group that the customer has been invited to join.
- ACCEPT_LINK: a link to accept the invitation; applies to the Invite E-Mail only.
- DECLINE_LINK: a link to decline the invitation; applies to the Invite E-Mail only.
- RESPONSE: the invited customer's response (Accepted or Declined) to the invitation; applies to the Response E-Mail only.