

About Purchasing Groups (called Customer Groups in the OMS)

Understanding generally how the Purchasing Groups feature works will facilitate a more expeditious set up of this powerful functionality.

A. What are Purchasing Groups?

The Purchasing Groups feature is activated and managed primarily in the Customers/ Preferences/ Customer Groups section of your Order Management System (“OMS”). This feature allows some customers to be designated as Master Customers (“Masters”), and other customers to be designated as Subcustomers (or “Members”) in one of the Master's Purchasing Groups.

Every order placed by a Member of a Purchasing Group will be billed to and paid by the Group Master and not the Member who is placing the order. Additionally, you may allow for the Member orders to be rolled up to the Master for group order reporting purposes, rather than each order being attributed to each ordering Member.

You or the Master may also require that some or all Member orders be approved by one or more designated Approvers.

B. How are Masters and Members Designated?

You control whether or not customers can designate themselves as Masters in their online accounts, or whether customers may only be designated by you as Master Customers by modifying customer records via the OMS or via XML. Similarly, you control whether or not Masters may self-terminate as Masters.

You may designate or invite customers as group Members through your OMS by modifying their customer records, and a Master can invite customers to be group Members even if the Master doesn't have OMS access. Section E. below offers more detail on this process.

You control whether Members may leave a Group on their own. You will also have the opportunity to specify what happens to Members when a Group is terminated.

If some or all orders will require approval, then you or the Master of each Purchasing Group designates which Members are Requisitioners (may only place orders) and which Members are Approvers (may place orders and approve orders placed by others.)

C. How does the Ordering Process Work?

When a Member places an order, he/she is not required to specify either a Bill-To Address or a payment method; rather, the Bill-To Address is taken from the Master customer, and the payment method is specified by the Master at the group level.

If order approvals are required, placed orders awaiting approval land in the OMS as Pending Orders which automatically activate when approval is granted. Pending orders cannot be processed until they are activated through the approval process. Orders automatically cancel if rejected by an Approver, and they may also automatically cancel after passage of a time period you may specify, if neither approval nor rejection occurs in that time.

Orders that require approval may be approved (or rejected) by the Master, and by any subcustomer Members with the role of Approver at the Customer Group level.

When a Member places an order that requires approval, an Order Submitted E-Mail is sent to the ordering Member, and an Order Approver E-Mail is sent to the Master and each of the order's Approvers. When approval is granted, the orderer receives an Order Approved E-Mail. If approval is not required, the orderer receives an Order Confirmation E-Mail upon placement, while the Master receives a Master Customer Confirmation E-Mail. If an order is cancelled, the orderer receives an Order Cancellation E-Mail. These automated emails require that certain Boolean options be turned on in the settings section. The Activate Purchasing Groups guided tutorials (Parts 1, 2 and 3) will walk you through that, and you will also be given the opportunity to customize those emails (Layout/Enhanced Emails) if you wish to modify the defaults.

In their online accounts pages, Master Customers may view Group Orders and Subscriptions, and approve or reject Group Pending Orders. Approvers may also view Group Orders (but not Subscriptions) for which they are Approvers, and approve or reject Group Pending Orders.

Finally, you will have options about how to handle Bulk orders, if you plan to place any in your OMS, as they relate to Members. You may choose to i) exclude Members from Bulk orders entirely, or (ii) Override Bulk Order settings with Master Customer settings (which means that Member orders follow the Customer Group settings, overriding options selected for the Bulk Order {e.g. Payment Method, Pending Order status} when they conflict), or (iii) Override Master Customer settings (which places Member orders as regular orders, honoring all options selected for the Bulk Order and ignoring the relationship with the Master).

D. How do Members and Masters Know How to Use the Feature?

As a part of set up, you will have the opportunity to modify the default “explanations” of how Purchasing Groups work, which Masters and Members will see on their online account pages.

When Masters log in and navigate to their Account pages, they will see your customized text explaining how Purchasing Groups work, and they will be able to manage their groups by adding and deleting groups, adding and deleting members, and viewing and approving member orders and subscriptions.

When Members log in and navigate to their account pages, they will see what group they are in and will see your customized text explaining how Purchasing Groups work.

You may also choose to communicate separately with your employees or customers (as appropriate) about who can or should use Purchasing Groups, as well as how and when to use it.

E. How do I create Masters, Groups and Members after I set up the Purchasing Groups Functionality?

After you set up the Purchasing Groups functionality, if you wish to set up groups, you must first ensure that a customer account is created for the billing contact of the new Purchasing Group you wish to add into the system. Make this billing contact customer the Master and add a new Purchasing Group to this customer's account in the OMS.

After the Masters and Groups are created, you may assign or invite members, or your end customer may invite Members, making each either an Approver or Requisitioner. If a Member is assigned, there is no invitation process and they are Members upon assignment. If a Member is invited, they receive a customizable email invitation and become a Pending Group Member until they either accept or decline the invitation via a customizable response email.

You can create customer records, assign Masters and assign or invite Members, via spreadsheet upload, manually, and via XML. You must create Groups manually. You may simultaneously create customer records and assign or invite those customers to be Members. Your end customer may invite other customers to be a Member only if that customer record already exists in the OMS.

Only people with existing customer records in the OMS can be invited into a Purchasing Group. For example, new employees of yours or your customer's, must be entered into the OMS as a customer prior to being designated or invited as a Group Member. Or, customers can be designated as members of existing groups as you load them into the system.

Per the above, a customer who is invited to a Group is a Pending Member of the Group until he/she accepts (or declines) the invitation, and any orders placed by a Pending Member have no relationship to the Master.

Additional Notes:

1. Activating Enhanced Email functionality is a pre-requisite to activating Purchase Groups.
2. A customer in the OMS may be designated as either a Master or a Member, but not both.
3. A Master can have multiple Groups. However, Members (Requisitioners and Approvers) can be a Member of only one Purchasing Group at a time.
4. When a customer joins a Customer Group, he/she automatically takes the Customer Type of the Master Customer. However, this may be overridden when creating or editing customers within the Order Management System; via the Customer Import (Customers/Import); or via the CustomerUpdate XML Tool (Settings/XML Tools).
5. We recommend that you either use an "Elegant cart" -style, always-onscreen cart in your store, or add an "Account" link to your store header to make it easy for Masters, Approvers and Requisitioners (as well as all other customers) to log in and easily navigate to their respective account pages to manage Groups and orders, as applicable. To facilitate this please contact your TrueCommerce/Nexternal implementation specialist or account manager, or TrueCommerce/Nexternal customer support. Fees may apply.