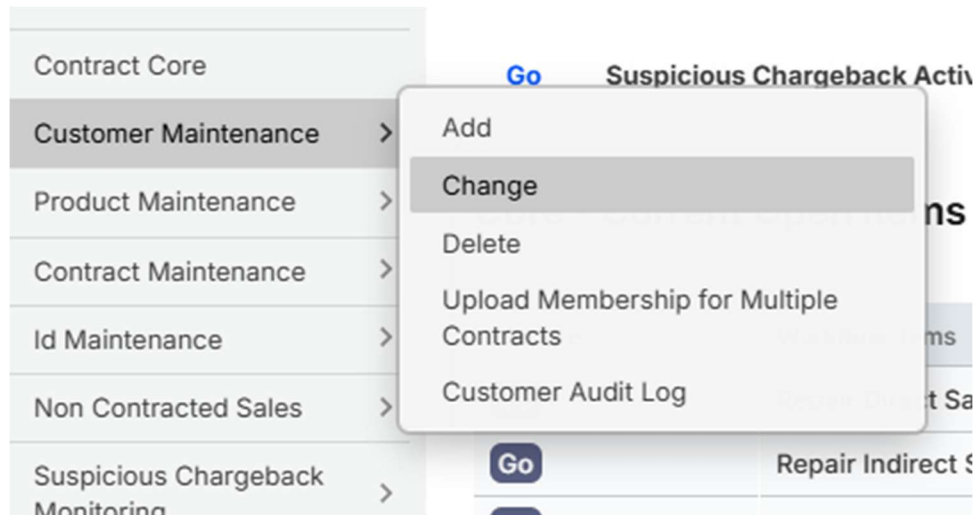


Customer Maintenance - Overview

A user can add and update customer master data in the iContracts application by accessing Contract Core -> Customer Maintenance.



Associated User Roles:

CORE
 CORE_READ_ONLY
 CUSTOMER_MAINTENANCE_READ_ONLY
 COT_MAINTENANCE_READ_ONLY
 NO_COT_CHANGES
 STATE_MEDICAID_PROGRAMS

Related Interfaces:

Upload Customer – Allows a user to upload customer data.
 - Accessed via Contract Core -> Interfaces -> Uploads -> Upload Customer
Multi Contract Group Membership – Allows a user to upload purchaser type customers and update contract membership rosters.
 - Accessed via Customer Maintenance -> Upload Membership for Multiple Contracts

Customer Maintenance – User Role Descriptions

The below table outlines the user roles associated with customer maintenance actions.

Role Name	Description
CORE	Allows user to login to application. User has write access to direct and indirect sales repair functions, customer maintenance features, product maintenance features, contract maintenance features, COT

	<p>maintenance features, territory maintenance features, and GL Code maintenance features.</p>
CORE_READ_ONLY	<p>User can view customer, product, contract, COT, territory, and GL Code details. User cannot add, change, or delete customers, products, contracts, COTs, territories, or GL codes.</p>
COT_MAINTENANCE_READ_ONLY	<p>User can view Classes of Trade, but will not be able to add, change, or delete COT data.</p>
CUSTOMER_MAINTENANCE_READ_ONLY	<p>User can view customers, but will not be able to add, change, or delete customer data. User will not have access to the membership interface.</p>
NO_COT_CHANGES	<p>User will not have access to change Class of Trade for existing customers. User will still be able to add new customers.</p>
STATE_MEDICAID_PROGRAMS	<p>User will have the ability to add and make changes to customers with the type 'State Medicaid Program'.</p> <p>If the user has the STATE_MEDICAID_PROGRAMS role in addition to the CUSTOMER_MAINTENANCE_READ ONLY role, the user will have the ability to make changes to the customer type State Medicaid Program only. If the user also has the role CORE_READ_ONLY, this will override the role, and the user will not be able to make any changes to any customer type.</p>