

Customer Group Maintenance

Aptean Ltd
Copyright © 2011-2026.

Contents

1 Customer Group Maintenance.....1

1 Customer Group Maintenance

The Customer Group Maintenance page allows maintenance of customer group information.

Customer Group Creation

Customer Group

Description

Owner

OBS : OBS Owner

Create

Customer Group Selection

Owner

OBS : OBS Owner

Customer Group

None - Un-Grouped

Find

Delete

Customer	Description	Town	PostCode	Select
C-1	customer_description customer_add_1	customer_add_3	customer_add_5	<input type="checkbox"/>

Navigation

<<

>>

1/1

No. Rows

15

Select All

Clear All

Move/Copy/Remove Selection

Move To Group

GRTEST - GRTEST

Move

The user has the option to create a new customer group by entering a Customer Group, Description and Owner in the 'Customer Group Creation' section of the page. The list of owners is limited to those assigned to the users group. The customer group will initially be created with no customers in the group. The customer group may be deleted by pressing the 'Delete' button (though the 'None' group cannot be deleted).

Once created, the new customer group or any existing customer group (visible to the user) can be selected from the drop-down. Initially, all new customers uploaded onto the system will be assigned into the group 'NONE'.

Selecting a customer group from the drop-down will bring up a list of the customers currently in the selected group. The customer, description (consisting of description and address line 1), town and post code will be displayed along with a tick box for selecting customer to process.

The user may Move or Copy selected Customers from one group to another (or back into the 'NONE' group).

Moving a customer will take the customer out of the existing group, and move it to the new group.

Copying a customer will leave the customer in the existing group, but also copy it to the new group.

The user also has the ability to remove a customer from the currently selected group (unless the group is 'NONE').

