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**Owner:** Paul Rust

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**Classification:** Internal

**Draft or Final:** Final

## FORCE - Customer Identity Mapping

The purpose of this document is show the wireframes and flows required to implement the online journeys for the Customer Identity Mapping process for FORCE.

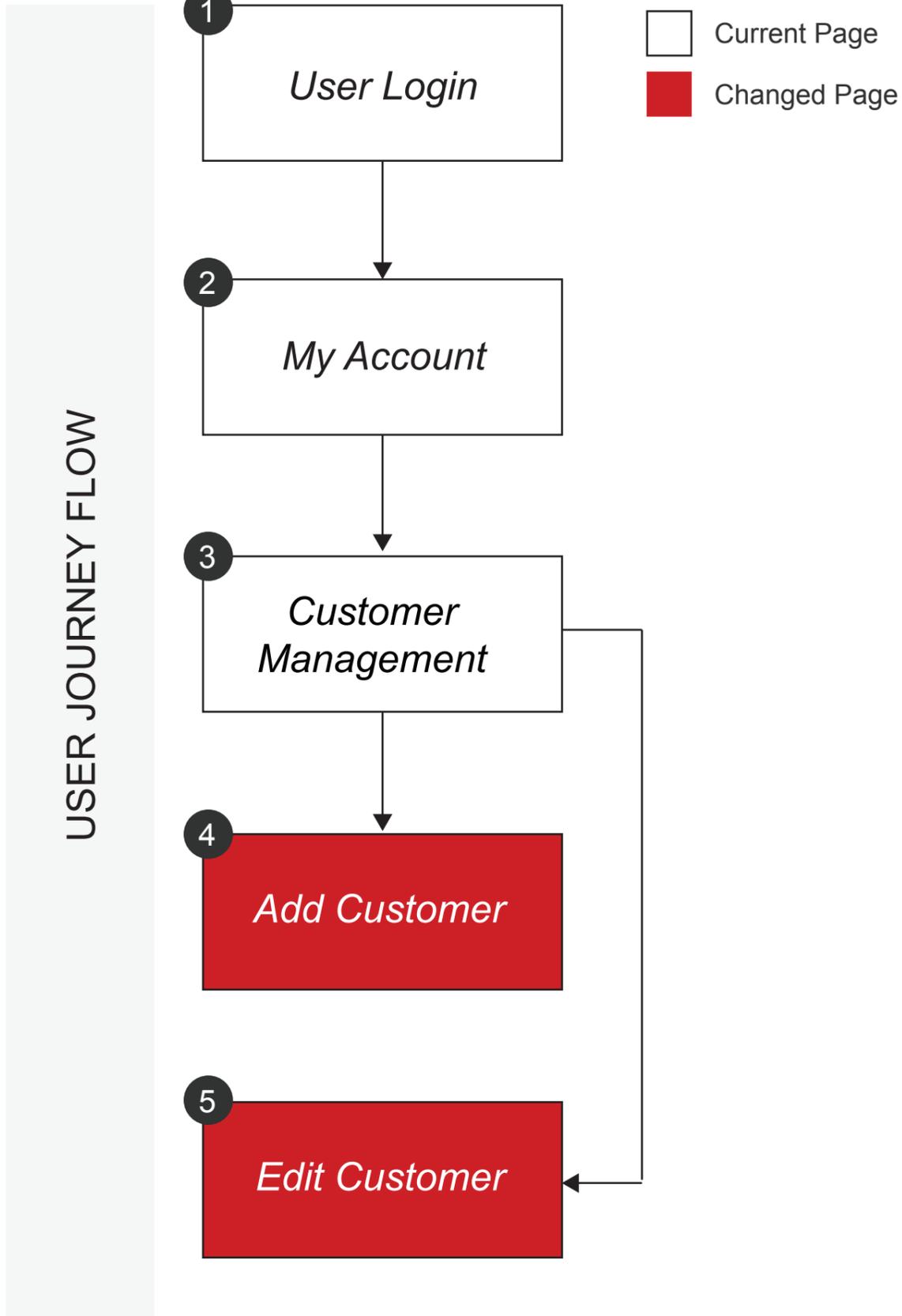
This is used to inform stakeholders and the production team.

### Introduction

For a customer to be able to view their order status via portal order tracker, correct Force ID needs to be mapped with customer portal account. The mapping process will have to be done manually as part of customer **Create and Edit** process. It is very important that the right Force customer account is mapped to portal customer account. Any incorrect mapping can lead to serious issues where order details of one customer are exposed to a different customer.

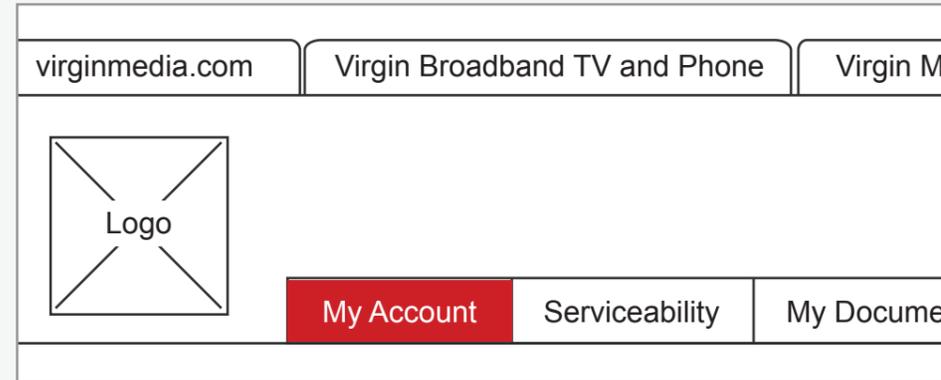
During the mapping process, Sales/portal support will need to perform a Force customer lookup using one of the two methods.

- a. Force Customer / Organization ID
- b. Force Customer / Organization Name

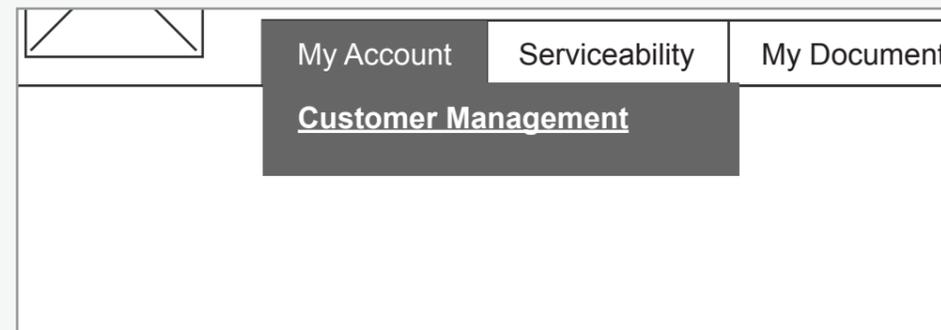


## User Journey Flow

- 1 User successfully logs in to the Engage Portal
- 2 User selects My Account (or hovers to view drop down menu) in main portal navigation

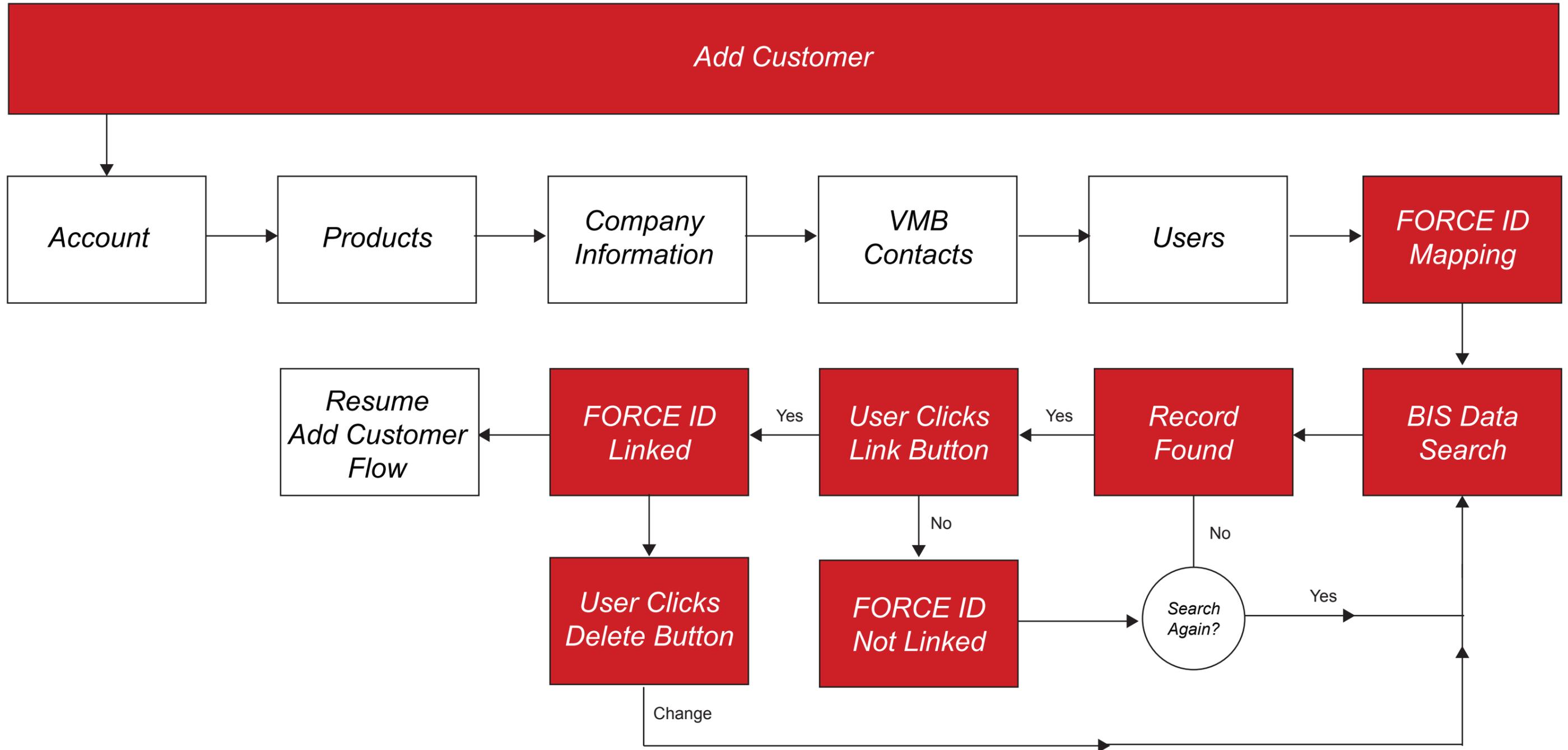


- 3 User selects Customer Management in sub navigation and is directed to the Customer Customer Management homepage.



- 4 User either select Add Customer  
OR
- 5 User selects a customer to edit

Add Customer Flow



## Add Customer > FORCE Mapping Tab

The FORCE Mapping Tab is a NEW tab in the Add Customer flow. This tab allows the user to search for a customer using FORCE ID or Customer Name and then links the FORCE ID to the customer portal account.

- 1 New tab in Add Customer flow.
- 2 FORCE ID or Customer Name is entered and a lookup is initiated, the response will then list any matching FORCE accounts. The lookup is done against the list of Customer ID's in BIS feed.
- 3 Button to activate the search  
Data must be inputted to textbox in order to submit the form.
- 4 If the user selects the Add Manually radio button then this gives them option to enter the FORCE ID manually.  
  
When the Add Manually is selected then the Button label becomes 'Link' and not 'Search'.

## Add Customer > FORCE Mapping Tab - Search Results

The FORCE Mapping Tab is a NEW tab in the Add Customer flow. This tab allows the user to search for a customer using FORCE ID or Customer Name and then links the FORCE ID to the customer portal account.

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Portal Home | My Profile | Logout

Logo

My Account | Serviceability | My Documents | Orders | Quotes | My Billing

Account | Products | Company Information | VMB Contacts | Users | **FORCE Mapping**

### Add Customer - FORCE Mapping

FORCE Organisation ID  
  FORCE Organisation Name  
  Add Manually

Enter Search Term

Search Data

#### Search Results 1

Select	Business Name	Sector	Account Managaer
<input type="checkbox"/> <span style="color:red">2</span>	Data	Data	Data
<input type="checkbox"/>	Data	Data	Data
<input type="checkbox"/>	Data	Data	Data

1
2
3
4

Showing Page x of x

**1** Search Result panel. This shows all matched records from the users search.

If no results are found the display an error message letting user know that no results have been found.

**2** HTML Checkbox to let user select the record/s they want to link to the customers portal account.

**Note:**  
By default no HTML Checkboxes are selected and multiple can be selected.

**3** Button that MUST be clicked by user in order to save the selected FORCE ID against the customers portal account.

Once the FORCE ID is linked the user the linked FORCE ID is shown to the user (see page 5).

This screen allows user to Finish or change the linked FORCE ID.



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Account Products Company Information VMB Contacts Users **FORCE Mapping**

### Add Customer - FORCE Mapping

Current Mapped FORCE ID's

Business Name	Sector	Account Manager	Primary ID	
Data	Data	Data	<input type="radio"/>	Delete

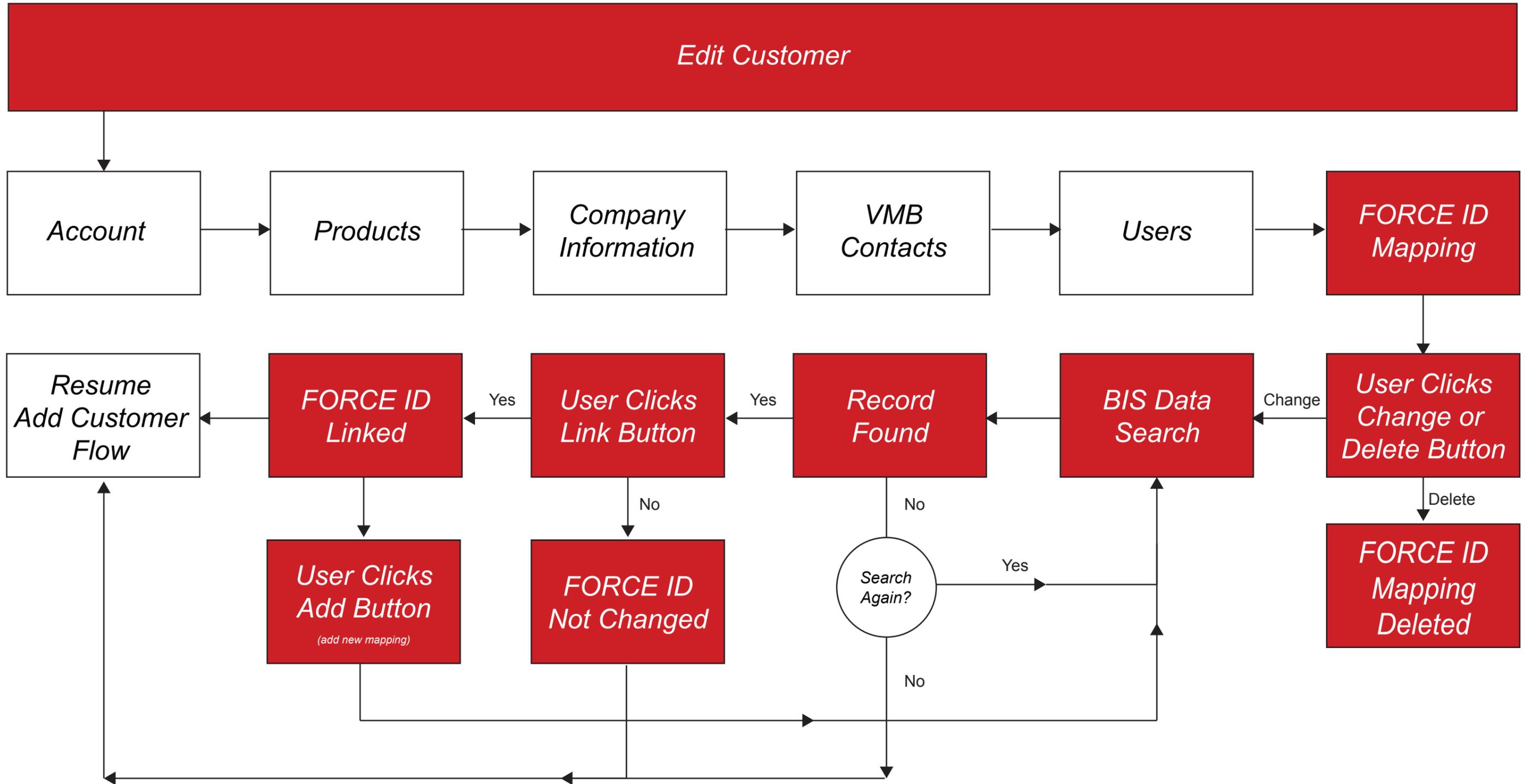
Buttons: Cancel, Previous, Finish

Annotations: 1 (Add button), 2 (Delete button), 3 (Add button), 4 (Radio button)

- 1 Table to show which FORCE ID is mapped to the customers portal account
  - 2 If user clicks the Delete Button the mapping for that FORCE ID is deleted.
  - 3 If user clicks Add Button they are allowed to add multiple FORCE ID Mappings. This will take the user into the search process (page 4).
  - 4 This radio when selected will set the FORCE ID to the primary FORCE ID. Only one is allowed to be selected and will auto submit when selected to save it.
- When user clicks on Finish Button the the normal Add Customer process resumes.
- NOTE:** The user MUST add in a FORCE ID in order to save the customer.



Edit Customer Flow



## Edit Customer > FORCE Mapping Tab

The FORCE Mapping Tab is a NEW tab in the Edit Customer flow. This tab allows the user to view current ampped FORCE ID and change the mapped FORCE ID to another one using the same process seen in Add Customer > Force Mapping Tab.

Account Products Company Information VMB Contacts Users **FORCE Mapping**

### Edit Customer - FORCE Mapping

Current Mapped FORCE ID's

Business Name	Sector	Account Managaer	Primary ID	
Data	Data	Data	<input type="radio"/>	Delete

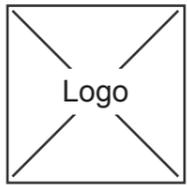
Buttons: Add, Delete, Cancel, Finish

Annotations: 1 (Primary ID), 2 (Delete), 3 (Radio), 4 (Add)

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  - 4 If user clicks Add Button they are allowed to add multiple FORCE ID Mappings. This will take the user into the search process (page 9).
- When user clicks on Finish Button the the normal Edit Customer process resumes.
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						<a href="#">Portal Home</a>   <a href="#">My Profile</a>   <a href="#">Logout</a>
<b>My Account</b>		Serviceability	My Documents	Orders	Quotes	My Billing

Account	Products	Company Information	VMB Contacts	Users	<b>FORCE Mapping</b>
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### Edit Customer - FORCE Mapping

FORCE Organisation ID   
  FORCE Organisation Name   
  Add Manually

Enter Search Term



FORCE Organisation ID   
  FORCE Organisation Name   
  Add Manually

Enter FORCE ID



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