

# Updating End Customer Information and choosing the margins you see in the pricefile

Sign into the MWH portal <https://www.cloud.mwh.ie> and you will see the dashboard.

The dashboard features a navigation bar with 'micro warehouse' logo, 'Dashboard' (active), 'Customers', 'Catalogue', 'Reporting', and 'Administration'. On the right, it shows 'What's New', 'English', and 'Hello Nicole Finn'. The main content area has a large welcome banner: 'Welcome to the new MicroWarehouse Cloud Portal' with a cityscape illustration. Below the banner are three summary cards: '17 Customers' (purple), '23 Subscriptions' (dark blue), and '59 Seats' (green). A table titled 'Upcoming Subscription Renewals' shows one record: 'Microsoft 365 Business Premium' for customer 'Sec', with 8 days left, ending on 'Aug 9, 2023', on a 'Monthly' term, with a quantity of 1.

Click customers, all of your existing customers are displayed in alphabetical order.

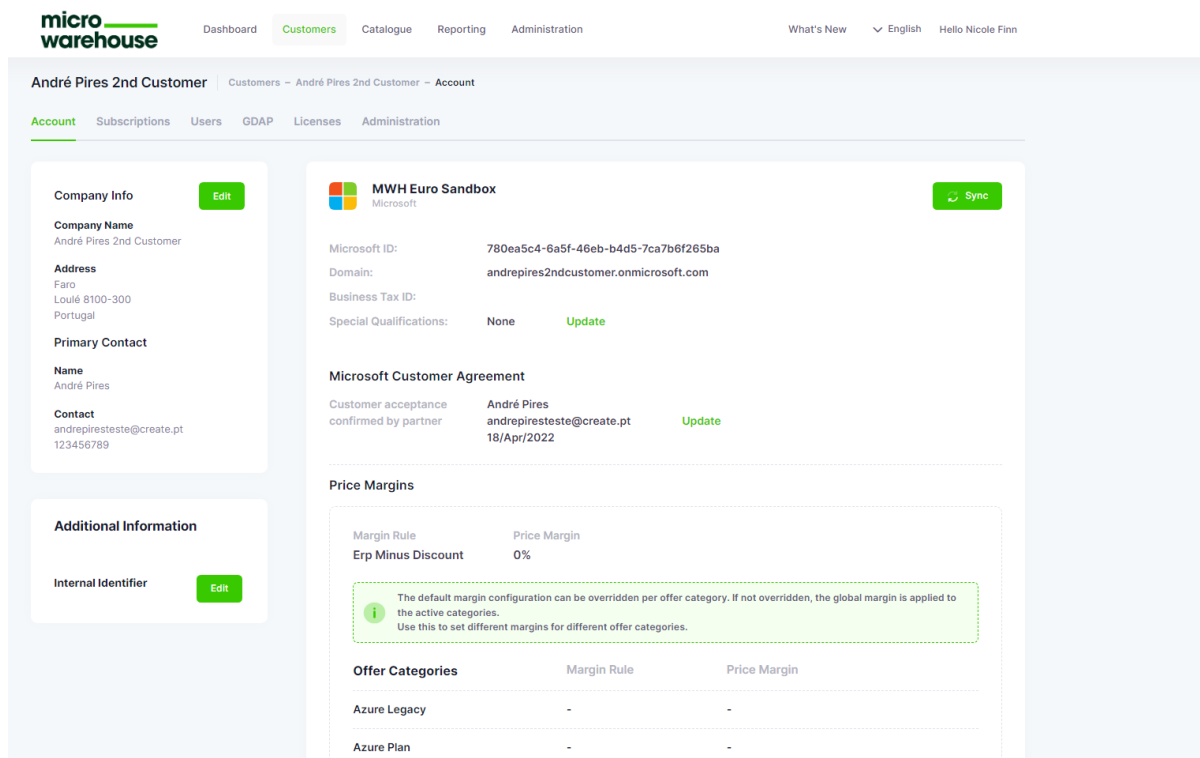
The 'Customers List' page has a search bar 'Search by company name' and three buttons: 'Create Customer Relationship', 'Import Customer', and '+ Create Customer'. The table below lists customers in alphabetical order by company name, with a '+' icon on the left and an 'Actions' dropdown on the right for each row.

COMPANY NAME	ACTIONS
+ Sec	Actions
+ Alan-Sandbox-Test-260723	Actions
+ André Pires 2nd Customer	Actions
+ André Pires Customer	Actions
+ André Pires TEST2	Actions
+ Another Customer	Actions
+ Education Test Customer	Actions

Once you have found the customer who's details you want to update, hover over it and it will turn green, then click on the name of the customer.

This page shows you all of the customer information from their name, address and contact details to their qualification status, (ie Academic. Nonprofit or commercial,)

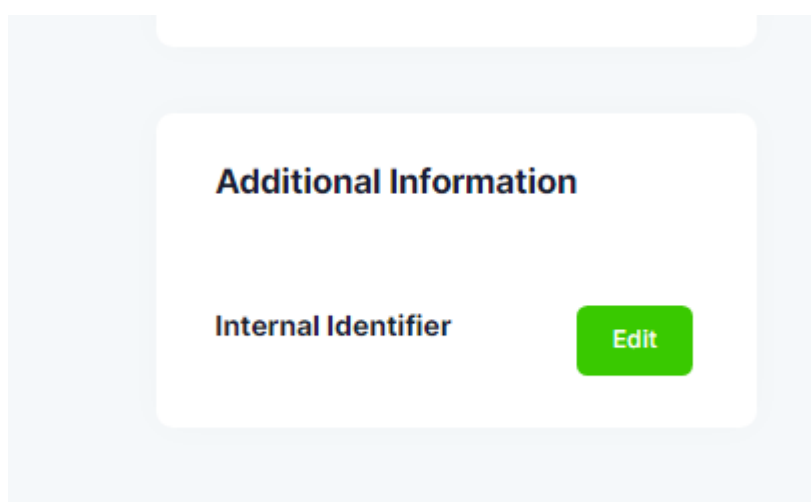
It also shows who signed the Microsoft Customer agreement and when, and the price margins that you have set up for them!



If you need to change the customer's name or address, you can do it by clicking Edit beside "Company Info"

The only thing you cannot change is the Country. This can never be changed!

There is also the option to have an internal identifier under additional information: this is where you can add a customer code if you want to!



### Company

Company Name \*  Country \*

Tax Id

Address Line 1 \*  Address Line 2

City \*  State/Region \*  ZIP/Postal Code \*

### Primary Contact

First Name \*  Middle Name  Last Name \*

The price margin you have set up for your customer only affects how pricing is displayed to **you**... for example, if you have the price margin set to markup 20%, it will show you your cost with a 20% markup on it when you look at the price list under that customer, or when you add a license t that customer.

If you have it set to ERP minus discount – 0 it will show you the RRP.

This is the default setting but can be changed at any time by clicking edit margins... if you edit the margins on only one license type, license Legacy for example, then the edits you make will only affect that license type, everything else will stay as the default...

You can have it set up differently foe every customer if you want to!

The customer doesn't see this unless they have access to the portal to add and manage their own licenses. This is only for your own quoting references.

## Price Margins

Margin Rule \*

Erp Minus Discount ▾

Price Margin \*

0.00

%



The default margin configuration can be overridden per offer category. If not overridden, the global margin is applied to the active categories. Use this to set different margins for different offer categories.

Offer Categories	Margin Rule	Price Margin
<input type="checkbox"/> Azure Legacy		%
<input type="checkbox"/> Azure Plan		%
<input type="checkbox"/> Azure Reservation		%
<input type="checkbox"/> Azure Savings Plan		%
<input checked="" type="checkbox"/> License	Margin ▾	20 %
<input type="checkbox"/> License Legacy		%
<input type="checkbox"/> Perpetual Software		%