Article from community manager

Workflow

Caterpillar Customer Master is the Caterpillar database of customers associated with dealers.

A *customer organization* represents a customer that can be associated with multiple dealers.

A *dealer customer* is an instance of a customer organization associated with a specific dealer (dealer code). A dealer customer is identified by the combination of a dealer code and DCN (dealer customer number) joined with a pipe (|), for example, "TD68|245TRSSDG343456.

Use the Dealer ERP Customer Master API to associate a new or existing customer organization with a dealer (single dealer code). The workflows is as follows:

- When the API user submits the request, a search is performed to find the customer organization in the customer master database.
    - If the customer organization is not found in the database, the customer organization is created using `businessName`, `alternateName`, address, email, and phones with the status of `ACTIVE`.
    - If a customer organization is found, it will be associated with the specified dealer code.
- When a customer organization is associated the specified dealer code, the resulting DCN (`dealerCode` and `dealerCustomerNumber` combination) is validated against in the customer master database.
    - If the DCN exists and is not associated to any customer organization, then an association is created with the provided `customerOrganizationIdentifier` and the DCN and a 200 response is returned.
    - If the DCN exists in the customer master database and is associated to any customer organization, a 400 response code is returned.
    - If the DCN does not exist in the database, then the dealer customer is created using `businessName`,`alternateName`,`dealerCustomerNumber`, `dealerCode`, `dealerType=REVENUE` (by default), address, email, phones attributes and associated to customer organization.
- To associate the customer organization with additional dealer codes, submit additional requests using the `customerOrganizationIdentifier` returned by the original call. See examples below.