

Visual Streamline FAQ

Why in Contract Pricing -> Pricing am I unable to add a customer to an affiliate contract?

Below are the steps to add a customer to an affiliate contract.

Screenshot 1: Active and Future Contracts for Both Customers and Affiliates

Type	Code	Contract Code	Description	Contract Date	Start Date	End Date	Ship To	End User	Select
A	OSU	OSU1	test contract aff	18-Mar-2026	01-Mar-2026	31-Mar-2026			
C	9999	9999-1	TEST	31-Jan-2025	31-Jan-2025	31-Jan-2099			
C	NEW2	TEST	test	05-Feb-2025	05-Feb-2025	06-Jun-2026			
A	SMW2-SMW2	23784-AC-02	23784 (Items 23784-06 thru 10)	23-Apr-2012	01-Jan-2015	30-May-2026			
A	SUE	SUE1							
C	SUE01	TURCK1	test contract import	14-Jan-2026	14-Jan-2026	31-Aug-2026			

Click the code field then press F5.

Screenshot 2: Affiliation Types

Type	Affiliation Description
SMWV	Steve Weiss TestAffiliation
SMWV2-01	Customer-SMW2 ShipTo-01
SMWV2-02	Customer-SMW2 ShipTo-02
SMWV2-ALL	Customer-SMW2 ShipTo-ALL
SMWV2-CUST	Customer-SMW2 ONLY (No shiptos)
SMWV2-SMW2	Customer-SMW2 ShipTo-SMW2
SS	ss
STREET	street
SUE	test

Click on the customers button.

Screenshot 3: Customers linked to Affiliation [SUE]

Customer	Customer Name	Default	Affected Shipto
CHARLES	CHARLES1	☐	No Shiptos
SUE01	Sucust	☐	Some Shiptos
SUE03	Sueco Inc.	☐	All Shiptos
SUE04	TEST	☐	Some Shiptos

Click on the New button and add the customer.

Additional Contract Info
Affiliation Name: test
ShipTo Name:
End User Name:

Customer Affiliations designated as Defaults will be automatically linked to new shipto addresses.
Customer Affiliations associated with ALL Shiptos should probably be designated as Defaults.
Customer Affiliations associated with NO Shiptos should probably be deleted.