Account Select Widget

Widget Use

Displays a list of all of the user's accounts, along with a search facility. The user can select from the list to switch between accounts when logged in. The widget can also be used within the cart to allow users to switch accounts for their current order.

Example of Widget Use

Following is an example of the widget in use:

Account Select Page

Account Select

Please select your account from the list below, or use the search facility to look up the account Name or Code.

Account Code or Name

Search Clear

Contains Starts With

2 records, (1 page)

Code	Name	Address
FREEDOM	Freedom Imports	12560 Pacific Hwy
ABC	The ABC Trading Company	1186 Toorak Road

Where can the Widget be placed?

The widget can be used in the following templates:

- Account Select Page Template
- Cart Template

Widget Options

Option	Use	Comments	Available from Version
Description	A short description of the widget's use.	We recommended this field be updated so the widget's purpose is clear at a glance from the template page.	All
Layer	The layer the widget is valid for.	The layering technology allows for the content to be shown to specific audiences. This is handy if the content is only valid for a certain type of user, or if the same widget is required for more than one audience, but different configuration is needed. The widget can be added to the zone more than once and the layer feature can determine which audience can see each widget.	All
Show Address 1?	Determines whether the default address for the Customer is displayed.	Default is: ticked Untick to disable	All
Customer Code Title	The text displayed at the top of the Customer Code column in the account list.	Default is: Code	All
Customer Name Title	The text displayed at the top of the Customer Name column in the account list.	Default is: Name	All
Customer Address 1 Title	The text displayed at the top of the Customer Address column in the account list.	Default is: Address	All
Default Redirect Home?	When ticked, if there is no redirect page provided, redirect to the home page after a successful account selection.	Default is: ticked Untick to disable	All
Change Account For Order			
Is Change Account For Current Order?	Determines whether the cart contents stay with the user once they switch accounts.	Default is: unticked Tick to enable **Note** - Enable this option when the widget is in the Cart template (not on the Account Select Page template)	3.88
Button Label	The text on the Change Account button in the cart.	Default is: Change Account For Current Order	3.88
Popup Window Title	The heading text at the top of the Account Select modal window.	Default is: Select Account For Current Order	3.88
Default Popup Window Content	TBC	Default is: Switch Order	3.88
Popup Window Confirm Heading	The heading text in the Confirmation modal window. This window launches when the destination account is not permitted to order one or more of the products in the cart.	Default is: Confirm Order Switch	3.88
Popup Window Confirm Content	The message displayed in the Confirmation modal window. This window launches when the destination account is not permitted to order one or more of the products in the cart.	Default is: The following products are not permitted to be ordered under the selected Customer Account and will be removed:	3.88

Related help

- Add Cost Centre for Whole Order — Cost centres allow your B2B customers to assign purchases to different budget areas of their business, e.g., departments, offices, branches. Cost centres are created at the Customer account level. Provision can be made to integrate cost centre codes from your ERP.
- Reprint Account Invoices — Allow your B2B customers to reprint invoices for their orders.
- Force User to Select Customer Upon Login — Your B2B users who have access to more than one Customer account can be forced to select an account after logging in.

- Cost Centres — Cost centres are used on sites with B2B users within the context of an organisation's budget practices. You can set up cost centres so that a purchaser from this organisation enters one cost centre for the whole order (for sites on 4.37+) or one for each order line. Consult Commerce Vision for integration of cost centre codes from the ERP. This article focuses on setting up order line cost centres.

- Customer Warning Notes — Warning Notes adds a popup message against a customer account and displayed when internal users edit the record and when a new user is added or needs approval in CMS. The message can contain any relevant information such as business rules that apply to the customer, default user budget limits, settings that should not be modified, etc.
- Dispute Invoices — Add the facility for your customers on account to dispute outstanding invoices.
- User Budgets — Set up and maintain Customer budgets for Users.
- Account Payment
- Allow Users With Multiple Accounts to Track All Orders — Administrators can enable or disable the setting to control whether B2B users can track orders for ALL customer accounts they have access to, or just those of the account they are currently in.
- Customer Maintenance — Edit Customer settings on your website.
- Invoice Reprints (PRONTO) — Allow your B2B customers to reprint invoices for their orders. (For PRONTO.)
- Converting a debtor code on the website
- Drilling Down to a Sales Order from the Bill-To Account
- Assign Multiple Customer Accounts to a User — Assign multiple Customer accounts to a User.
- Customer Activation — Set a customer to 'active' (to have their data integrated).