

Invite ERP Customer User to Register Account



Want this feature?

This feature requires consultation with Commerce Vision. For sites on 4.37+.

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This feature automatically sends an email invitation to specified new customer users in your ERP to activate their online accounts.

The system creates a new user account for applicable customers, sets their status to 'pending activation', and sends an invitation email to the contact email address. The email contains a time-sensitive activate account link. Clicking on it takes the user to your website, where they are asked to enter a password. Once they have done this, their account will be activated.



Hi Jane

Thank you for registering for Commerce Vision BPD on Wednesday, 9 June 2021 10:04:30 (GMT +10:00). Please click on the link below to verify your email address.

[Verify Email Address](#)

For your security, this link will expire 5 minutes from now from the time this email is sent.

If the activate account link expires before the user activates their account, administrators can re-send the email invitation by going to Website Users in the CMS and looking up the user. There is a resend email button next to the user and in their Edit User page.

Prerequisites for the invitation:

- Consultation with Commerce Vision is required to identify valid customer users.

Enable and configure the feature

This step may have been done by Commerce Vision.

1. In the CMS, go to **Settings Settings Feature Management User**.

2. Ensure **User Accounts** is enabled, then click **Configure**.

Feature	Available in CMS	Options
Auto Part Registration Make auto part registration email templates available for editing.	<input type="checkbox"/>	
Single Sign-On Single Sign-On options for your website.	<input type="checkbox"/>	
Third Party Login Third party login options for your website.	<input type="checkbox"/>	
User Accounts Configure user maintenance options.	<input checked="" type="checkbox"/>	Configure
User Associations Configure user associations maintenance options.	<input type="checkbox"/>	
User Impersonation Configure user impersonation options.	<input type="checkbox"/>	
User-Debtor Integration Configure User-Debtor 2-way integration options for your website.	<input type="checkbox"/>	

3. Scroll down to the 'Invitation to Account Activation Email Settings' section.

Invitation to Account Activation Email Settings
Invitation to Account Activation Email Settings

☒ Enable Invitation to Account Activation Email

Email Timeout (Hours)

Invitation to Account Activation Email Subject

Invitation To Account Activation Email Template

Task Options
Configure settings related to Send invitation To Account Activation Emails Task

Name	Active?	Occurrence	Start	End	Data
Send Invite	Yes	Repeat	15-Feb-2022 03:10:00 PM	15	Edit Delete

1 - 1 of 1 Items

[Add New Task](#)

- **Enable Invitation to Account Activation Email** - Toggle ON to enable the feature.
- **Email Timeout (Hours)** - how long before activate account link in email expires. Default: 24 hrs
- **Invitation to Account Activation Email Subject** - Subject of invitation email

4. The system sends the invitation email through a scheduled task. In **Task Options**, set or edit the send email schedule.

Task Options
Configure settings related to Send invitation To Account Activation Emails Task

Name	Active?	Occurrence	Start	End	Data
Send Invite	Yes	Repeat	15-Feb-2022 03:10:00 PM	15	Edit Delete

1 - 1 of 1 Items

[Add New Task](#)

- **Task** - pre-filled scheduled task name. Cannot be changed.
- **Name** - task description
- **Is Active** - toggle ON to enable task
- **Occurrence** - how often to run task
- **Start** - start date/time of task
- **Period (in minutes)** - (for 'Repeat' occurrence only) - run task every X minutes
- **Active Hours Start (leave blank for all day)** - time task starts running each day. Leave blank to run all day.
- **Active Hours End** - time task stops running
- **Pre Stored Procedure** - (should be pre-filled by Commerce Vision).
- **Post Stored Procedure** - (should be pre-filled by Commerce Vision).

5. To save your settings, click **Save** or **Save & Exit**.

Customise email template

The email content of the Invitation to Activate Account email template can be edited.

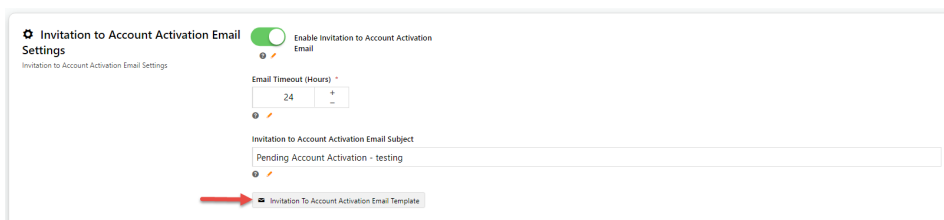
Invitation to Account Activation

Thank you for registering for Commerce Vision BPD on Tuesday, 15 February 2022 14:26:13 (E. Australia Daylight Time). Please click on the link below to activate your account.

[Activate Now](#)

For your security, this link will expire 20 hours from the time this email is sent.

1. In the 'Invitation to Account Activation Email Settings' section, click **Invitation to Account Activation Email Template**.



2. Scroll down to the **Invitation to Account Activation Widget**.
3. Edit widget as needed. See: [Account Activation Email Content Widget](#).

[Home](#) > [Register](#)

Register





Please register to continue.

Thank you for registering. A verification email has been sent to you. Once you verify your email you will be able to login and complete the registration process.

Resend expired email

Administrators can resend the invitation email to users whose activate link has expired and whose status is still 'pending activation'.

1. Go to **Users Website Users**.
2. Use the **Search** tool to find the user.
3. A user with a 'pending activation' status displays a **Send Invitation Email** button. Click to resend the email.

Email Address (Login id)	Name	Options
jane.smith.cv123@gmail.com	jane Smith	 Edit  Copy  Delete  Send Invitation Email



The resend Email button is also available while the user's Edit User page.

Additional Information

Minimum Version Requirements	4.37
Prerequisites	Implementation by Commerce Vision
Self Configurable	No
Business Function	User
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

Related widgets

- [Account Activation Email Content Widget](#)