

# 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

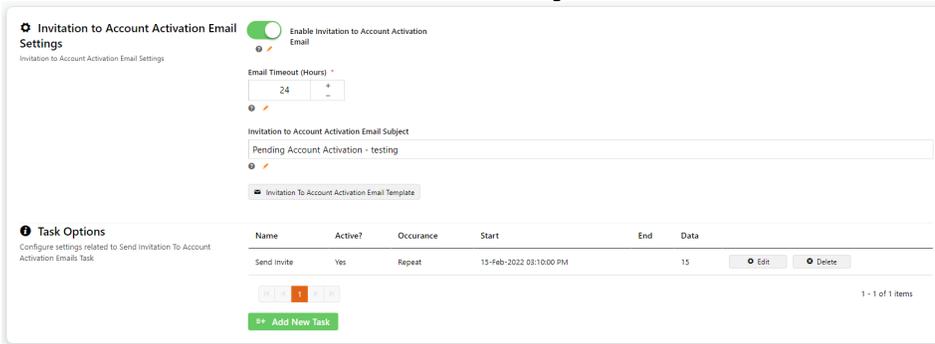
This step may have been done by Commerce Vision.

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"/>	
<b>User Accounts</b> Configure user maintenance options.	<input checked="" type="checkbox"/>	<a href="#">Configure</a>
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.



- **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** - 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.



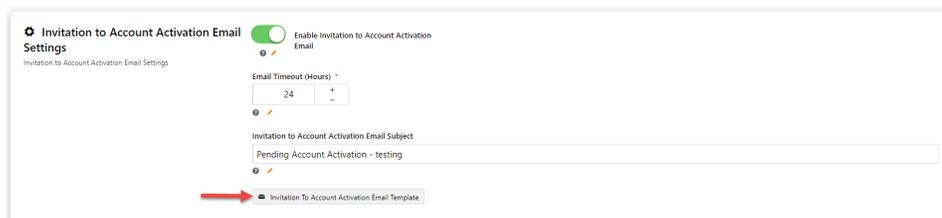
# Invitation to Account Activation

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.



### Additional Information

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

### Related help

### Related widgets

- [Account Activation Email Content Widget](#)