Website User Maintenance in CMS

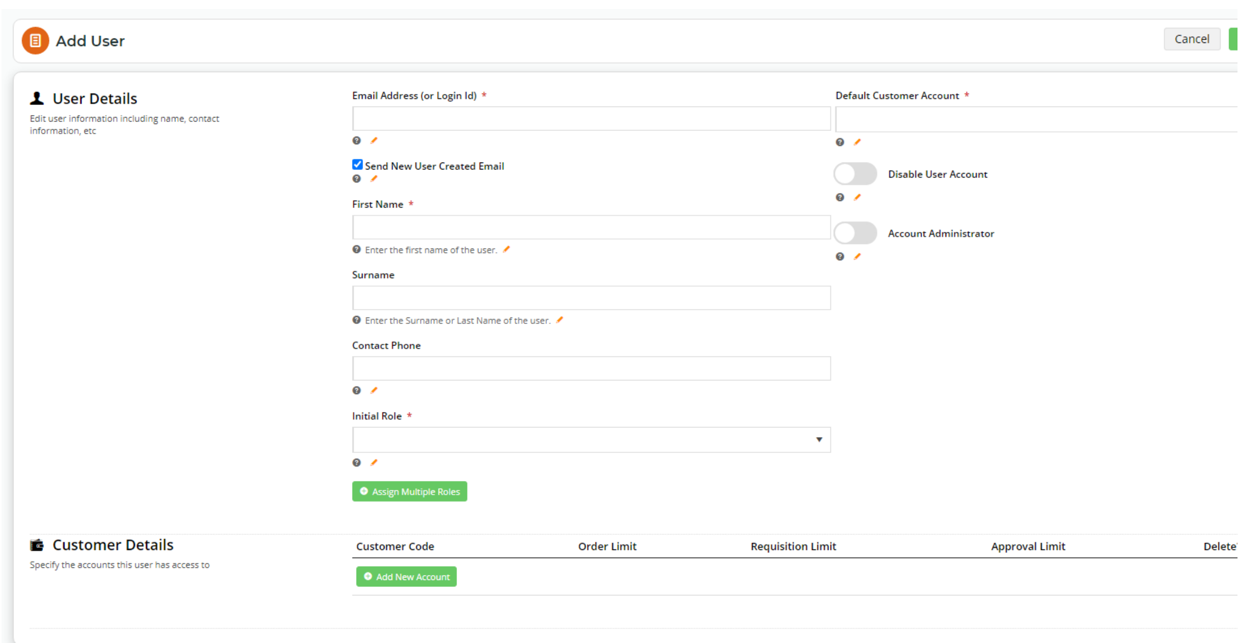
Overview

On this page:

Your website might target purchasers that are B2C (consumers), B2B (business), or both. Unless your site permits unregistered users to purchase without creating an account (Guest Users), all website users are registered and associated with one default Customer account, and perhaps to additional Customers as well. They will also be assigned one or more Roles. These largely determine what they can view and do on your website.

While B2C users generally self-register on the website, B2B users are often set up by your eCommerce Team (or they may partially self-register and await approval).

NOTE - Some of your staff members will also be registered Website Users, so that they can perform various administrative, account-keeping and customer service tasks.

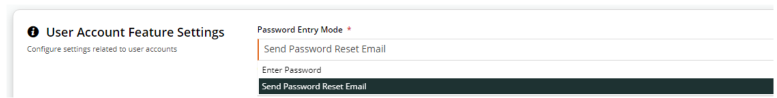
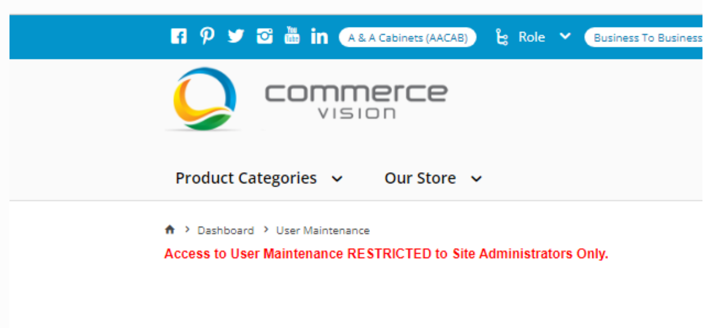


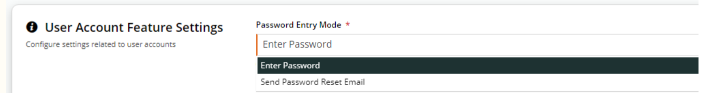
Step-by-step guide

Create a new user

1. *In the CMS, navigate to **Users Website Users**.*
2. *Click the **Add New User** button (top right corner).*

3. *In the **User Details** section, enter the new user's details:*

Field	***Description***
Email Address (or Login Id)	*The user's Login ID, usually their email address.*
Notify Email Address	(Displays only if Login ID is not an email address) *If a login ID is not an email address, a **Notify Email Address** field automatically displa entered.*
Send New User Created Email 	*Default: ticked. When ticked, a welcome email is sent to the new user. The email conta* ***NOTE** - This option ONLY appears if the password entry mode is selected in '**Send Pa: ature Settings User Accounts**).* 
First Name	*The user's first name.*
Surname	*The user's last name.*
Contact Phone	*The user's contact phone number.*
Initial Role	*The user's initial Role upon login. Select from the dropdown list. (For details about wha page.)*
Assign Multiple Roles	*If this user has more than one Role, click to add an another role. Then click 'Assign Ne dropdown list. Repeat as needed.* ***TIP -** When the user is logged into their account, they can easily switch to each Role.*
Default Customer Account	*Select the Customer Code from the dropdown list.* *Every registered user must have a default Customer account. A 'Customer' is typically be one Customer Code to be used for an individual B2C user.*
Disable User Account	*Default: OFF. Toggle ON to deactivate (but not delete) the user. If a user account is dis log into the site.*
Account Administrator	*Default: OFF. Toggle ON to grant the user access to User Maintenance (if present on t create other users, and assign roles and customer codes in accounts they have access* *If this is disabled for a user, they will not be able to access User Maintenance.* 

Change Password** and **Confirm Change Password	*Enter the user's password and re-enter to confirm it is correct.* ***Don't see the Change Password fields?*** *The two Change Password fields will ONLY appear if the password entry mode* ***tings Feature Management User User Accounts**.* 
Customer Details	**These fields display only after a new user has been created.**
Order Limit	*The maximum order value the user can submit on this account (provided their requisitio*
Requisition Limit	*The maximum order value the user can request for approval on this account.*
Approval Limit	*The maximum order value this user can approve on this account. This applies if the Cu*
User Cost Centres	**These fields apply to Cost Centres for the B2B Customer. Cost centres are used company budget. Not all Customers use Cost Centres.**

4. *To save this user, click **Save & Exit**.*

Copy an existing user

To create a new user with the same details in 'default account code', 'initial role', 'customer codes' and 'associated approval limits' as an existing user, that user can be copied. (These details can be edited if needed.)

1. *In the CMS, navigate to **Users Website Users**.*
2. *Use **Search** to find the user you want to copy.*
3. *Click the **Copy** button for the user.*

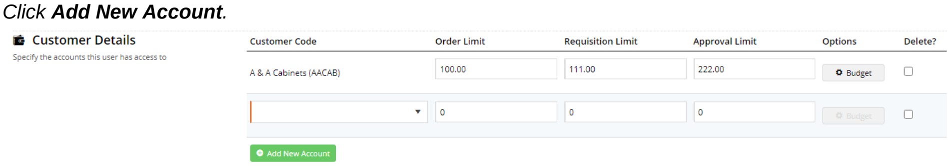
4. *In the 'Add User' page, add and edit details of the new user.*
5. *To save the changes, click the **Save & Exit** button.*

Add additional Customer account to a B2B user

Apart from the user's default Customer account, the User can be linked to additional Customer accounts.

1. *In the CMS, navigate to **Users Website Users**.*
2. *Use **Search** to find the user and then click **Edit**.*

3. *Click **Add New Account**.*



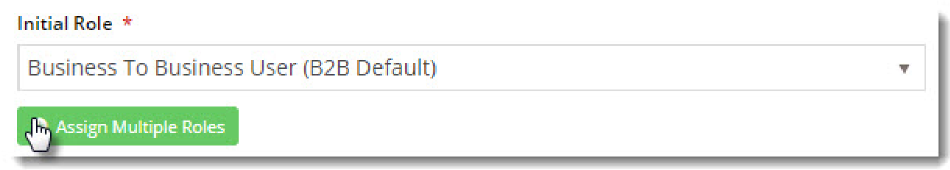
4. *Enter **Customer Details** as follows:*

Field	***Description***
Customer Code	*The additional Customer account the user will have access to.*
Order Limit	*The maximum order value this user can submit on this account (provided their requisition limit is of equal or higher value).*
Requisition Limit	*The maximum order value this user can request for approval on this account.*
Approval Limit	*The maximum order value this user can approve on this account.*
Budget	(Displays only if User Budgets is active.) *See User Budget help.*

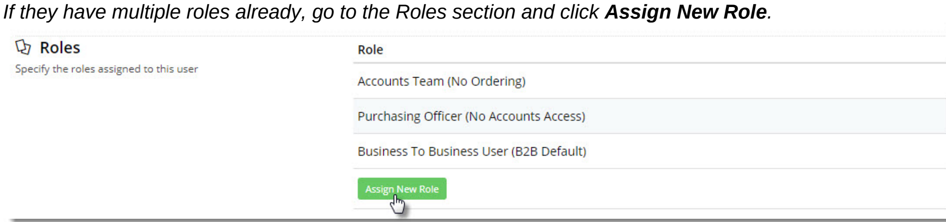
5. *To save your changes, click **Save & Exit**.*

Add additional Roles for a User

1. *In the CMS, navigate to **Users Website Users**.*
2. *Use **Search** to find the required user and then click **Edit**.*
3. *Click the **Assign Multiple Roles** button.*



4. *If they have multiple roles already, go to the Roles section and click **Assign New Role**.*

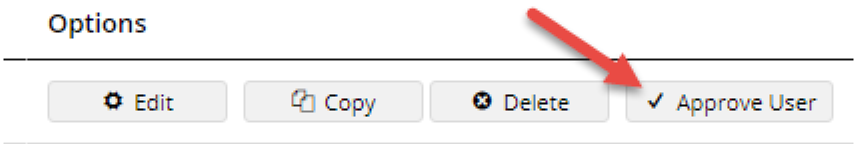


5. *Select the required role from the dropdown list.*
6. *To save your changes, click **Save & Exit**.*

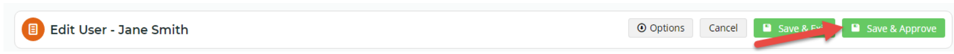
Approve a B2B User

If Auto Part Registration is enabled, a B2B user who registers for a login on your website will need to be reviewed and approved by the eCommerce Team. Until then, the user is partially registered. This means the user exists in the system but cannot login to your website.

1. *In the CMS, navigate to **Users Website Users**.*
2. *User **Search** to find the user you wish to approve, either by name, email address, or customer code.*
3. *To approve the user without reviewing details, click the **Approve User** button. This will approve the user and trigger the welcome email to be sent.*



4. *To review the user's details before approving, click **Edit**.*
5. *The user's details page will load. Check and correct user information as required. You can edit any of these details and assign additional Roles and Customer accounts if required.*
6. *To approve the user, click the **Save & Approve** button at the top of the screen. This will approve the user and trigger the welcome email to be sent.*

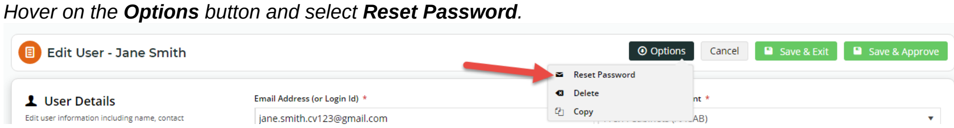


Reset a User's Password

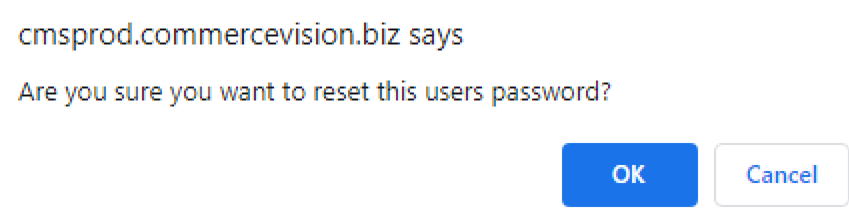
The process of resetting a user's password depends on the mode active on your site. You can check the mode by navigating to the **User Accounts** feature: **Settings Feature Management User**, then click **Configure**.

(i) '**Send Password Reset Email**' mode:

1. *Navigate to **Users Website Users**.*
2. *Use **Search** to find the required user and then click **Edit**.*
3. *Hover on the **Options** button and select **Reset Password**.*



4. *In the popup dialog box, click **OK** to confirm the request.*



5. *If the request is successful, a popup confirmation message will display to inform you that a password reset email has been sent.*

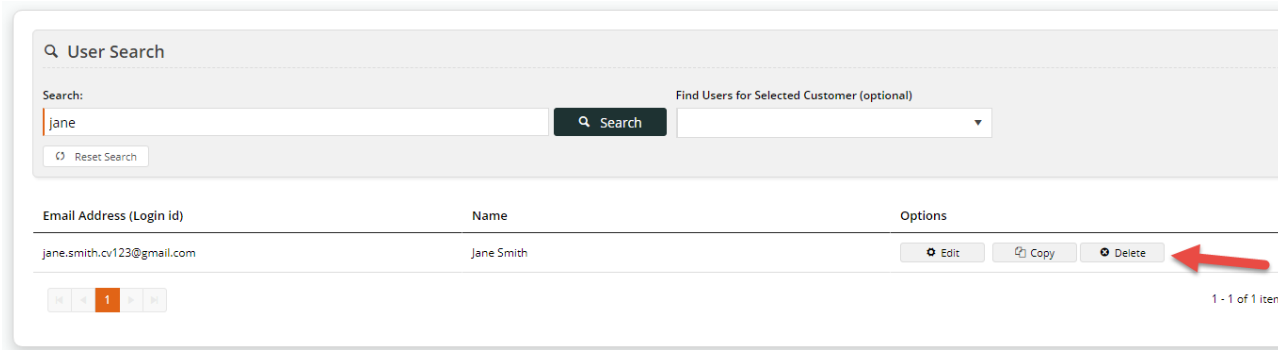
(ii) '**Enter Password**' mode:

1. *Navigate to **Users Website Users**.*
2. *Use **Search** to find the required user and then click **Edit**.*
3. *In the **Change Password** and **Confirm Change Password** fields, enter and re-enter the new password.*
4. *To save the changes, click **Save & Exit**.*

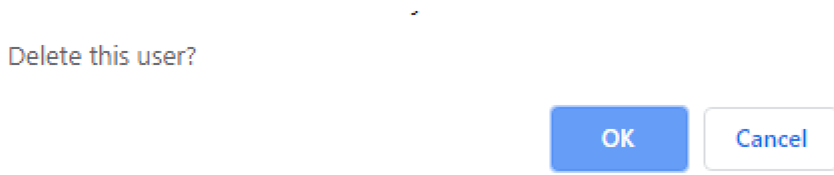
Delete a User's Account

An Administrator can remove a user's account. If the user has active orders, the user cannot be deleted.

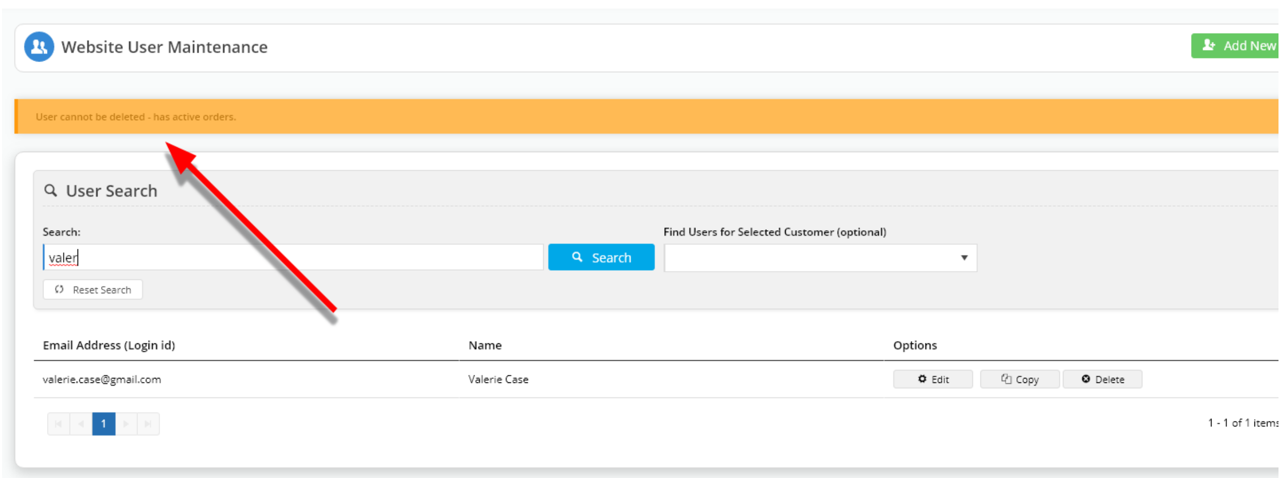
1. Go to **E-Commece Users Website Users**.
2. Use **Search** to find the user and click **Delete**.



3. You will asked to confirm your deletion request. Click **OK**.



4If the user has active orders, then they cannot be deleted until these orders have been finalised.



Related Resources

- Delete a Website User
- Set Default Customer Account for Users
- B2C User Registration with Email Verification
- Inactive User Management
- B2B User Registration