# Set Default Customer Account for Users

### Overview

Every registered Website user is assigned to at least one Customer account (with a unique Customer Code). Customer Codes are typically associated with specific customer accounts and may be from your ERP. There is also a Customer Code designated to default for self-registrations, usually the one assigned to B2C users. And depending on your business requirements, there may be Customer Codes set up for staff users. Apart from accounting purposes, assigning Customer Codes to users is critical for determining a user's access levels, to features, functions, and even prices (and more) when logged onto your site.

When a user is created on the Customer Self Service eCommerce Platform, they must be assigned to at least one Customer Code. If they are linked to a single Customer Code, this will automatically be set as their default Customer account. If they have multiple Customer Codes, one of these must be set as the default. Setting or changing the default Customer for a user is done by Administrator users.

When a user logs onto your site, they are automatically taken into their default Customer account. The Customer account a user is in is displayed on the top of the screen. (If they have other Customer accounts, they can switch accounts at any time.)

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#### Setting the default Customer for self-registered users

Administrators can manually add or bulk upload users and assign them to Customer accounts. These methods are used most often to populate B2B users for your website.

A visitor to your website can also initiate user account creation. This is done by filling in the form on the Register page or by opting to create an account when an order is submitted.

₽ Want to order online?	
Simply follow the links below to sign up!	
If you're not a trade customer, you just need web access:	L Register Now
If you are a trade customer but don't have a web account,	click here to apply.

Both processes will trigger the system to create a new user account. When a new user is created this way, the system automatically assigns the default Customer Code for B2C users to all new users. Unless a custom change was made to your site, this Customer Code is 'WEBSALES'.

More about assigning the default Customer account
V

#### **B2C Users**

B2C users are standalone purchasers who are purchasing for a business. If your site allows purchases by Guest users, they remain unregistered. If they sign up for a user account, a new user account is created and they are assigned to the default Customer Code 'WEBSALES'. The standard practice is for this Customer Code to remain their default Customer account, although this can be changed to suit business practices.

#### **B2B Users**

B2B users are trade purchasers and so the Customer Codes assigned to B2B users are connected to business Customer accounts. When a B2B user self-registers on your website, the standard registration form is supplied with a field to enter the Customer Code. This is for users whose businesses may already be in the system and the new user knows the Customer Code. If they do not enter a valid Customer Code in this field or leaves it blank, their user account will be created with the initial default B2C Customer Code 'WEBSALES'. This serves as a placeholder Customer Code that administrative staff can change manually in the CMS.

Home	>	Register

#### **1**+ Register

Please register to continue.

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First Name	Last Name
mail Address *	Confirm Email Address *
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## Step-by-step guide

This guide provides instructions on changing the default Customer account for a User.

3.	In the <b>Edit User</b> page, the current default Customer account is displayed in <b>Default Customer Account</b> . To change select an alternate from the dropdown list.
	1. As Administrator, login to your website.
	2. From the Account Selection menu, select Customer Maintenance.
	3. In the Search For box, enter one or more letters and numbers and click Search.
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## Delete a default Customer from a user

Customer Codes assigned to a user can be deleted by ticking the **Delete?** checkbox in the 'Customer Details' section when editing the user.

#### IMPORTANT - The current default Customer Account cannot be deleted. The default Customer must be changed first.

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	Web Sales Casual Account (WEBSALES)	0.00	0.00	0.00	
	Add New Account				

## Related help

- B2B User Registration
  Create Users to Approve Report
  Website User Maintenance for Account Admins
  Website User Roles
  Website User Maintenance in CMS