

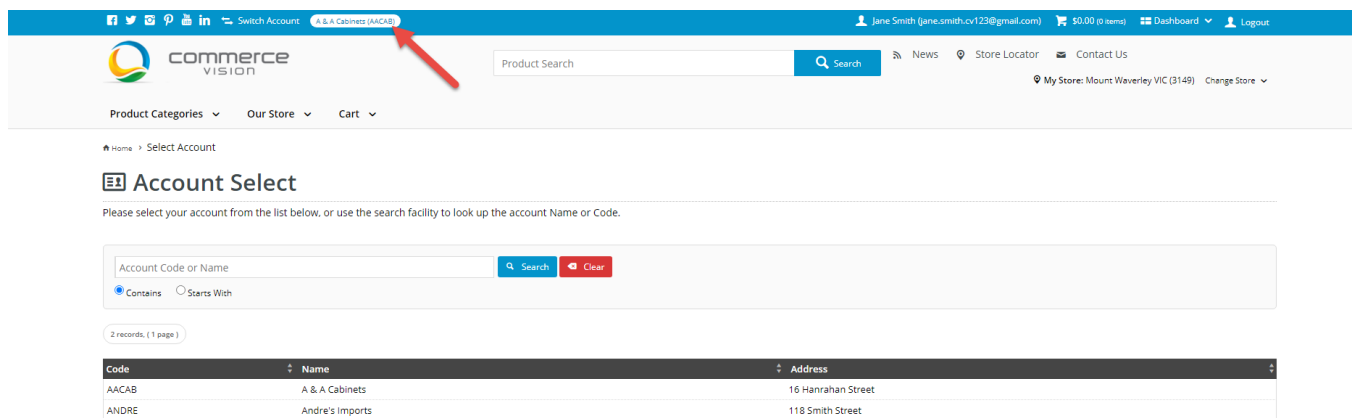
Set Default Customer Account for Users

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.)



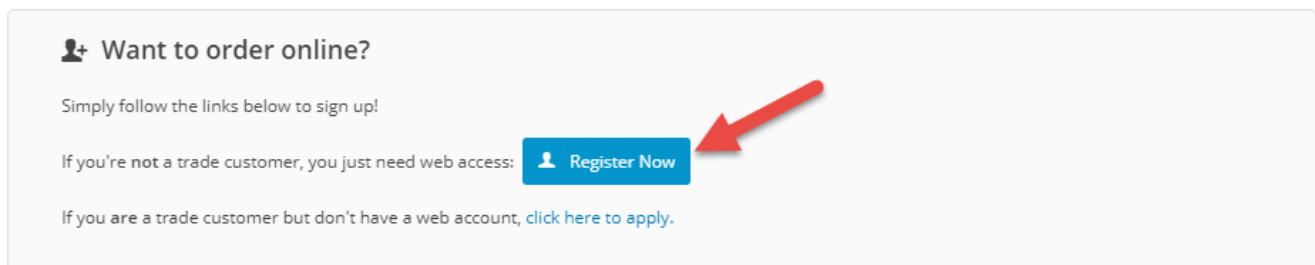
The screenshot shows the top navigation bar of the Commerce Vision website. The user is logged in as Jane Smith (jane.smith.vy123@gmail.com) with a shopping cart containing 50.00 (0 items). The 'Switch Account' dropdown menu is open, showing 'A & A Cabinets (AACAB)' as the selected account, indicated by a red arrow. Below the navigation bar, the 'Account Select' page is displayed, showing a search bar and a table of available accounts.

| Code | Name | Address |
|-------|-----------------|--------------------|
| AACAB | A & A Cabinets | 16 Hanrahan Street |
| ANDRE | Andre's Imports | 118 Smith Street |

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.



The screenshot shows the 'Want to order online?' registration form. It includes a heading 'Want to order online?' with a person icon, followed by the text 'Simply follow the links below to sign up!'. Below this, there are two options: 'If you're not a trade customer, you just need web access:' with a 'Register Now' button (indicated by a red arrow), and '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...

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](#)

Register

Please register to continue.

 Your Details

| | |
|---|--|
| First Name * | Last Name * |
| <input type="text" value="First Name"/> | <input type="text" value="Last Name"/> |
| Email Address * | Confirm Email Address * |
| <input type="text" value="Email Address"/> | <input type="text" value="Confirm Email Address"/> |
| Phone Number | |
| <input type="text" value="Phone Number"/> | |
| Company | |
| <input type="text" value="Company"/> | |
| Your Customer Account Code | |
| <input type="text" value="Your Customer Account Code"/> | |



Step-by-step guide

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

1. In the CMS, navigate to **Users Website Users**.
2. Use **Search** to find the user and click **Edit**.
3. In the **Edit User** page, the current default Customer account is displayed in **Default Customer Account**. To change it, 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**.

Search For :

☒ Contains ☐ Starts With

3. The Customers matching the search criteria will be listed. Find the correct one.

Search Customer Details Catalogues Cost Centres Delivery Addresses Audit All Users

Search For : ☐ Contains ☒ Starts With ☐ Equals

Search found 1 records

| Customer Code | Name | Phone Number |
|-----------------------------|----------------|--------------|
| <input type="radio"/> AACAB | A & A Cabinets | 03 9456-9999 |

72 records. (1 page) 1

Edit User - Jane Smith

User Details

Edit user information including name, contact information, etc.

Email Address (or Login Id) *

First Name *

Default Customer Account *

A & A Cabinets (AACAB)

Access Storage Sh Meltb (ACCESS SEL)

Adelaide Warehouse (ZADE)

4. To save this change, click **Save & Exit**. If the new default Customer account did not exist in the Customer Details section, it will be added upon saving.

Edit User - Jane Smith

User Details

Edit user information including name, contact information, etc.

Email Address (or Login Id) *

First Name *

Surname *

Contact Phone *

Initial Role *

Default Customer Account *

☒ Disable User Account

☐ Account Administrator

Customer Details

Specify the accounts this user has access to

| Customer Code | Order Limit | Requisition Limit | Approval Limit | Delete? |
|-------------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|--------------------------|
| A & A Cabinets (AACAB) | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="checkbox"/> |
| Affaire (WAFFA) | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="checkbox"/> |
| Web Sales Casual Account (WEBSALES) | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="checkbox"/> |

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.

Edit User - Jane Smith

OptionsCancelSave & Exit

User Details

Edit user information including name, contact information, etc

Email Address (or Login Id) *

jane.smith.cv125@gmail.com

First Name *

Jane

Surname

Smith

Contact Phone

0490777777

Initial Role *

Business To Business User (B2B Default) (CSSUser)

Assign Multiple Roles

Default Customer Account *

Affaire (WAFFA)

Disable User Account

Account Administrator

Customer Details

Specify the accounts this user has access to

| Customer Code | Order Limit | Requisition Limit | Approval Limit | Delete? |
|-------------------------------------|-------------|-------------------|----------------|-------------------------------------|
| A & A Cabinets (AACAB) | 0.00 | 0.00 | 0.00 | <input type="checkbox"/> |
| Affaire (WAFFA) | 0.00 | 0.00 | 0.00 | <input type="checkbox"/> |
| Web Sales Casual Account (WEBSALES) | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> |

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