

## Website User Maintenance in CMS

## Overview

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.

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Add User

Cancel

User Details

Edit user information including name, contact information, etc

Email Address (or Login Id) \*

☒ Send New User Created Email

First Name \*

Surname

Contact Phone

Initial Role \*

Assign Multiple Roles

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

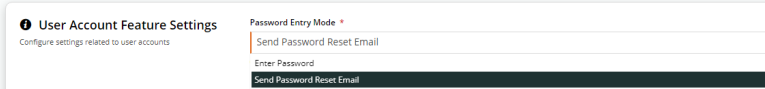
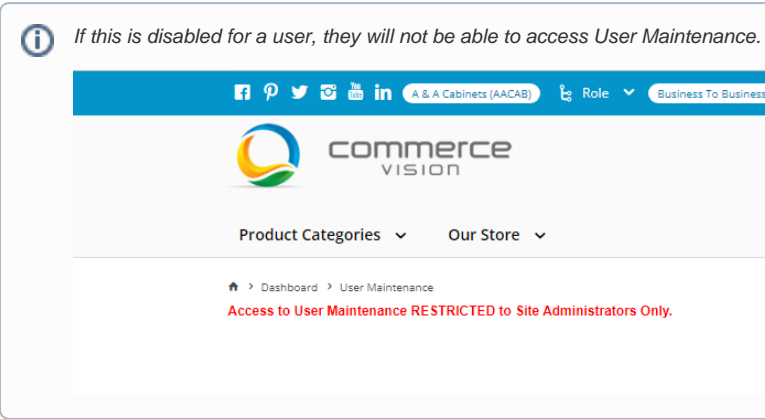
Add New Account



## 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
<b>Email Address (or Login Id)</b>	The user's Login ID, usually their email address.
<b>Notify Email Address</b>	(Displays only if Login ID is not an email address)  If a login ID is not an email address, a <b>Notify Email Address</b> field automatically displays and is entered.
<b>Send New User Created Email</b>  <input checked="" type="checkbox"/> <b>Send New User Created Email</b>	Default: ticked. When ticked, a welcome email is sent to the new user. The email contains the user's details.  <b>NOTE</b> - This option <b>ONLY</b> appears if the password entry mode is selected in ' <b>Send Password Reset Email</b> ' in <b>System Settings &gt; User Accounts</b> .  
<b>First Name</b>	The user's first name.
<b>Surname</b>	The user's last name.
<b>Contact Phone</b>	The user's contact phone number.
<b>Initial Role</b>	The user's initial Role upon login. Select from the dropdown list. (For details about what roles are available, see the <a href="#">Role</a> page.)
<b>Assign Multiple Roles</b>	If this user has more than one <a href="#">Role</a> , click to add another role. Then click 'Assign New Role' in the dropdown list. Repeat as needed.  <b>TIP</b> - When the user is logged into their account, they can easily switch to each Role.
<b>Default Customer Account</b>	Select the Customer Code from the dropdown list.  Every registered user must have a <a href="#">default Customer account</a> . A 'Customer' is typically a unique Customer Code to be used for an individual B2C user.
<b>Disable User Account</b>	Default: OFF. Toggle ON to deactivate (but not delete) the user. If a user account is disabled, the user cannot log into the site.
<b>Account Administrator</b>	Default: OFF. Toggle ON to grant the user access to User Maintenance (if present on the site) to create other users, and assign roles and customer codes in accounts they have access to.  

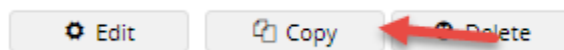
<b>Change Password and Confirm Change Password</b>	<p>Enter the user's password and re-enter to confirm it is correct.</p> <div> <div>  <b>Don't see the Change Password fields?</b>  The two Change Password fields will ONLY appear if the password entry mode is <b>Feature Management User User Accounts</b>. </div> <div> <div>  <b>User Account Feature Settings</b>  Configure settings related to user accounts </div> <div> Password Entry Mode *  Enter Password  Enter Password  Send Password Reset Email </div> </div> </div>
<b>Customer Details</b>	These fields display only after a new user has been created.
<b>Order Limit</b>	The maximum order value the user can submit on this account (provided their requisition limit is not exceeded).
<b>Requisition Limit</b>	The maximum order value the user can request for approval on this account.
<b>Approval Limit</b>	The maximum order value this user can approve on this account. This applies if the Customer has an approval limit.
<b>User Cost Centres</b>	These fields apply to <b>Cost Centres</b> for the B2B Customer. Cost centres are used to track company budget. Not all Customers use Cost Centres.

- 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.)

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

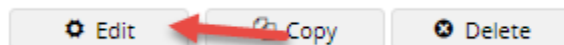


- In the 'Add User' page, add and edit details of the new user.
- To save the changes, click the **Save & Exit** button.


## 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.


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



- Click **Add New Account**.


**Customer Details**  
Specify the accounts this user has access to

Customer Code	Order Limit	Requisition Limit	Approval Limit	Options	Delete?
A & A Cabinets (AACAB)	100.00	111.00	222.00	<input checked="" type="radio"/> Budget	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Budget	<input type="checkbox"/>



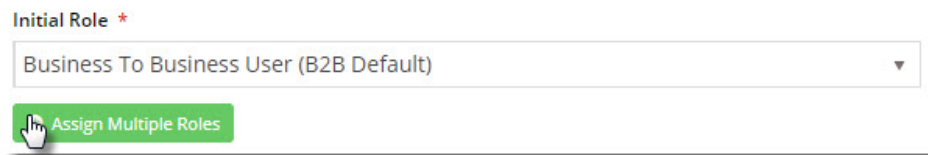
4. Enter **Customer Details** as follows:

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

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.

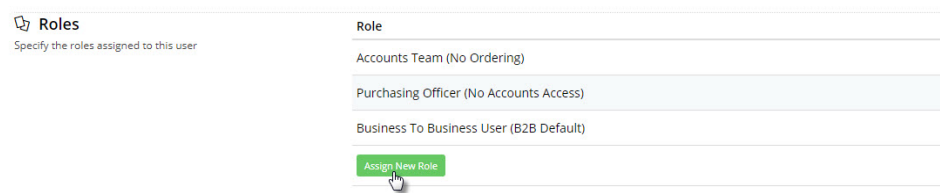


Initial Role \*

Business To Business User (B2B Default) ▼

Assign Multiple Roles

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



Roles

Specify the roles assigned to this user

Role
Accounts Team (No Ordering)
Purchasing Officer (No Accounts Access)
Business To Business User (B2B Default)

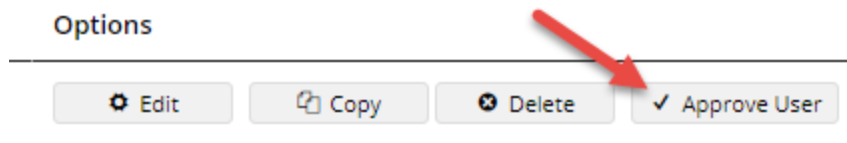
Assign New Role

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.

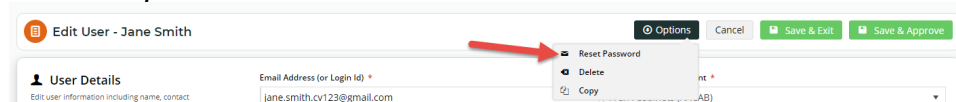


## Reset a User's Password

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.

cmsprod.commercevision.biz says  
Are you sure you want to reset this users password?



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-Commerce Users Website Users**.
2. Use **Search** to find the user and click **Delete**.

**User Search**

Search:   Find Users for Selected Customer (optional)

Email Address (Login id)	Name	Options
jane.smith.cv123@gmail.com	Jane Smith	<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>

1 - 1 of 1 item

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

Delete this user?

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

**Website User Maintenance**

User cannot be deleted - has active orders.

**User Search**

Search:   Find Users for Selected Customer (optional)

Email Address (Login id)	Name	Options
valerie.case@gmail.com	Valerie Case	<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>

1 - 1 of 1 item

## Related Resources

- [Delete a Website User](#)
- [Set Default Customer Account for Users](#)
- [B2C User Registration with Email Verification](#)
- [Inactive User Management](#)
- [B2B User Registration](#)