

B2B User Registration

Is this feature disabled?

Contact To Enable

This feature needs to be switched on for your site by Commerce Vision.

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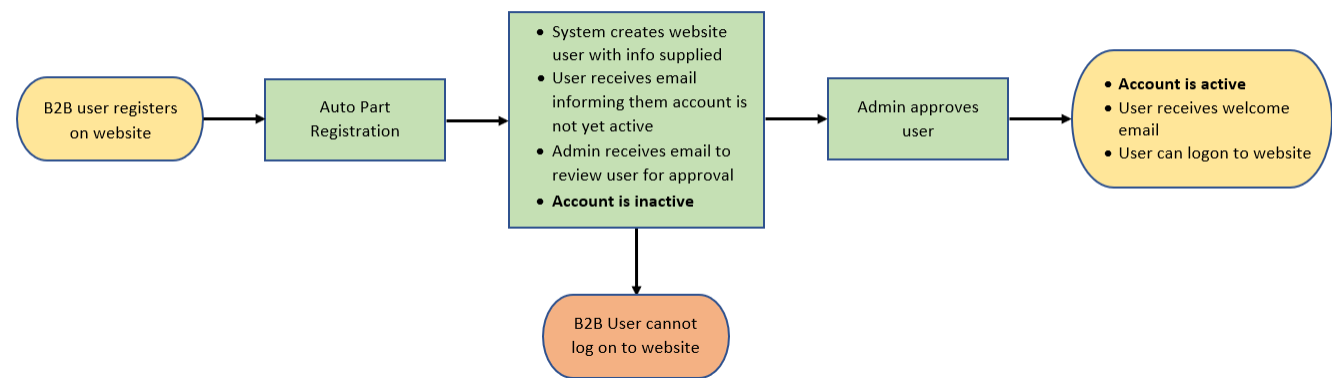
Overview

B2B Registration allows a trade (wholesale or business) user to register for B2B access and have their user (login) account linked to an ERP customer account. Users with active accounts can log on and will receive that account's default settings (i.e. Pricing, Warehouse, Contract Information etc). If Auto Part Registration is on, a new user is disabled until approved.

- (Versions 4.37+) Instead of globally enabling auto part registration, you can prevent users from some selected Customer accounts from successfully registering. See: [Set Auto Part Registration for Customer](#)

Registration Process

Default B2B user registration process:



1. When your website is enabled for B2B user registration, there is a link for B2B registration in the Login popup.

Login with a social network

 Sign in with Google

 Continue with Facebook

OR

Login with email

Username / Email *

Password *

[Forgot Your Password?](#)

Your Password

☐ Remember email

Login

Want to order online?

Simply follow the links below to sign up!

If you're not a trade customer, you just need web access: [Register Now](#)

If you are a trade customer but don't have a web account, [click here to apply](#).

2. The visitor fills in a form and includes:

- Contact Name
- Customer Code (**NOTE** - If this field is not mandatory, the new user is created against the default customer code. This is usually the public B2C customer. It can be changed manually.)
- Company
- Password
- Customer Account Code

Your Details

First Name *

First Name

Last Name *

Last Name

Email Address *

Email Address

Confirm Email Address *

Confirm Email Address

Phone Number

Phone Number

Customer Code *

AACAB

Company

Company

Your Customer Account Code

Your Customer Account Code



Extra fields can be added to the B2B Registration page. Contact Commerce Vision Support for assistance.

3. Depending on settings, the new user is either immediately registered and can log in to their account, or if User Approval is enabled, they must wait until their registration has been reviewed and approved by an Account Administrator.

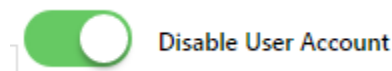
4. If User Approval (Auto Part Registration) is enabled, the Account Administrator is alerted that a Customer has registered for trade access. The user is notified that their registration is subject to approval.

5. If the user is approved, they receive an email stating their registration is approved and they can now login.

Add user approval step

Enable user approval

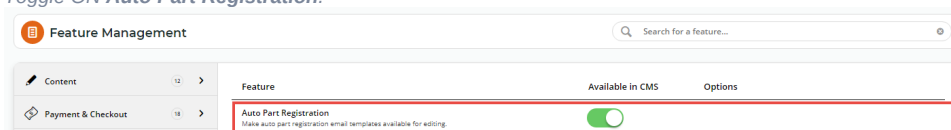
If Auto Part Registration is enabled, a 'review and approve' step for Admin is added so a new customer user application can be checked. The user exists but they cannot log onto your site yet. In the user's Edit User page, the Disable User Account is toggled ON.



To add this user approval step to the registration process:

1. In the CMS, go to **Settings** **Settings** **Feature Management** **User**.

2. Toggle ON **Auto Part Registration**.



3. If this Customer uses a process of multiple approvers, toggle ON **Tiered Approval in B2B Registration**.



This option allows different approvers (i.e. tiers) instead of just a single approver. This means approval can be directed to the more appropriate person, e.g a rep manager for a particular customer, or a state / territory manager for a particular location. With this setting on, if the registering user does not have a provide a CustomerCode, or if they do and that Customer record does not have a Rep User associated it with it, then it will fall back to the standard Auto Part Registration approver.

Approve a user

If user approval is enabled, the internal notification recipient receives an email that a B2B user has registered.



Web Access Approval Request

jane.smith.cv125@gmail.com has registered a user-login for access to this website as an Account Customer.

The account is currently disabled. To enable this user account, please log in to the CMS and enable it.

Go to [CMS User Maintenance Page](#) and search for jane.smith.cv125@gmail.com. Review the details and click [Approve User].

Phone: (07) 3369 3733

Fax: (07) 3891 3996

<https://430.commerce.vision>

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NOTE - Email content is rendered by the [B2B Registration Approval Required Widget](#).

- To access it: go to **Content** **Content** **Emails** **B2B Registration Approval Required Email** **B2B Registration Approval Required Email Template**
- (CMS Administrators only) **Settings** **Settings** **Feature Management** **Users** **Auto Part Registration** **Auto Part Registration Feature Settings** **B2B Registration Approval Required Email Template** button.

Administrators can approve a new B2B user registration.

To approve a user:

1. In the CMS, go to **Users** **Website Users**.
2. Use the **User Search** tool. You can search by email address (from the email notification).

Website User Maintenance

Options Add New User

User Search

Search: [Search] Find Users for Selected Customer (optional)

Reset Search

3. Approve user - select (a) or (b):
 - a. To approve the user without reviewing details, click the **Approve User** button.

Options

Edit Copy Delete Approve User

- b. To review user details, click **Edit** for the user. Change any details if required. **TIP** - You may need to change the User's Role, Customer Account, and budget thresholds (Order, Requisition and Approval limits).
4. To save, click **Save & Approve**. The user's account is enabled and they will receive the welcome email.



In the user's Edit User page, the **Disable User Account** toggle is automatically turned off.



Disable User Account

Enable/Disable Auto Part Registration for Customer

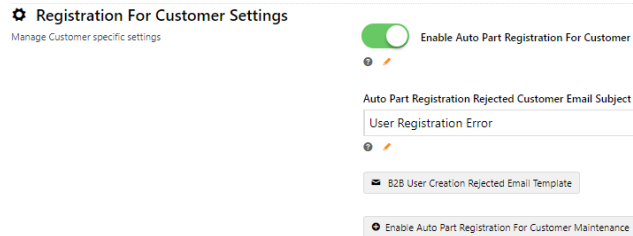
For 4.37+ only.

This option prevents registrations in some customer accounts. The email address entered during registration will receive notification of the unsuccessful registration. This email can be cc'ed to your nominated internal email address as well.

To disable a Customer Code from user registrations:

1. In **Auto Part Registraton** settings, ensure **Enable Auto Approve Registration** is toggled ON.

2. Scroll down to **Registration for Customer Settings**.



Registration For Customer Settings
Manage Customer specific settings

☒ Enable Auto Part Registration For Customer

Auto Part Registration Rejected Customer Email Subject
User Registration Error

B2B User Creation Rejected Email Template

Enable Auto Part Registration For Customer Maintenance

3. Toggle ON **Enable Auto Part Registration for Customer**.

4. To change the rejected email subject, edit **Auto Part Registration Rejected Customer Email Subject**. Default: User Registration Error

5. (Optional) To edit the rejected email template, click **B2B User Creation Rejected Email Template**. See: [B2B Rejected Registration Email](#)

TIP - This template can also be accessed via **Content Emails Users B2B Rejected Registration Email**

6. Click **Save** or **Save & Exit**.

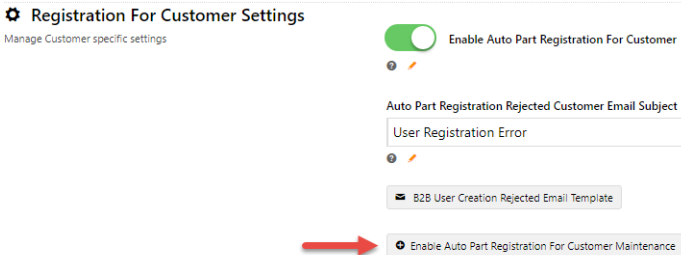
Create a Users to Approve Report

Don't want to scroll through your emails or website users to find users to approve? Create a simple report that displays all users to approve. Learn more: [Create Users to Approve Report](#)

Disable Registration for a Customer

By default, all customers are enabled for auto part registration if this feature is on. You can disable or re-enable a customer.

1. Click the **Enable Auto Part Registration for Customer Maintenance** button.



Registration For Customer Settings
Manage Customer specific settings

☒ Enable Auto Part Registration For Customer

Auto Part Registration Rejected Customer Email Subject
User Registration Error

B2B User Creation Rejected Email Template

Enable Auto Part Registration For Customer Maintenance

2. Use the **Search** tool to find the customer.

Enable Auto Part Registration For Customer Maintenance

Customer Search

Search: ABC

Search

Reset Search

Customer Code	Customer Name	Enable Auto Part Registration?
ABC	The ABC Trading Company	x

Disable

3. To prevent user registration to this customer account, click **Disable**.
4. The Success message confirms change in status. The Disable button is now greyed.

Enable Auto Part Registration For Customer Maintenance

Success
Customer has been updated.
Close

Customer Search

Search: ABC

Search

Reset Search

Customer Code	Customer Name	Enable Auto Part Registration?
ABC	The ABC Trading Company	x

Enable

Edit Unsuccessful Registration Email Template

To edit the email message sent when a customer account is disabled:

1. Click the **B2B Registration Rejected Customer Email** button.
2. Scroll down to **B2B Registration Rejected Customer Email Content Widget** and click **Edit**. See: [B2B Registration Rejected Customer Email Content Widget](#)

Zone: Content

B2B Registration Rejected Customer Email Content

Edit

Options

Add Widget

Additional Information

Minimum Version Requirements	4.37
Prerequisites	--
Self Configurable	Yes
Business Function	User
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related Resources

- [B2B User Registration](#)
- [Create Users to Approve Report](#)
- [Website User Maintenance for Account Admins](#)
- [Website User Roles](#)
- [Website User Maintenance in CMS](#)

Related widgets

- [APR Auto Approval Notification Widget](#)
- [B2B Registration Rejected Customer Email Template Widget](#)