

Customer Account/Trade Management

- [Creating a Trade Account for a Customer](#)

Creating a Trade Account for a Customer

Overview

If a customer does not currently have a trade account on your website, you can create one through Ncompass. Once created, the customer will be able to access the website using their new login details.

Instructions

1. In Ncompass, go to **Customers > Enquiry**.
2. Find the relevant customer.
 - If the customer does not exist, create a new customer record first.
3. Select the **Web Login** button, as shown in the image below.

The screenshot shows a web application window titled "Bloggs, 44 Example Lane, Cheap Street, LON DON -...". The form contains the following fields and buttons:

- CustomerID:** NCCRM/0000163
- Hot-links** and **Tools** buttons
- Customer Details** section:
 - Name:** Fields for Title, Initials, Forename (Joe), and Surname (Bloggs).
 - Company/Address:** 44 Example Lane, Cheap Street.
 - County:** Greater London, **Postcode:** LON DON.
 - Country:** [Not set]
 - Summary:** Bloggs, 44 Example Lane, Cheap Street, LON DON
 - Telephone:** 0789456123, **Two:** (empty)
 - Mobile No:** (empty), **Fax:** (empty)
 - Main Email:** joebloggs@findesolutions.com
 - Alt Email:** (empty)
 - Website:** (empty), ☐ Expired
- Web Login...** button (highlighted with a red box)
- Show Map...** and **Send Text...** buttons
- Close**, **Edit**, **Add Attachment...**, and **Extra >** buttons
- ☐ Standardise Case
- ☐ Show Expired

4. In the **Customer Web Accounts** window, click **Create New**.
5. Set **Account Type** to **Website**.
6. Under **New Account Options**, select **Create New Login On Website**.
7. Enter the customer's email address.
8. Add a note if required for future reference. This is optional.
9. Click **Save**.

The screenshot shows a software window titled "Customer Web Accounts - Bloggs, 44 Example Lane, Cheap Street, LON DON". The window is divided into two main sections. On the left, under the heading "Accounts", there is a large empty list box and four buttons: "Edit >", "Create Using", "Create New" (highlighted with a black circle and the number 1), and "Delete". On the right, the "Account Details" section contains several fields and options. The "Account Type" is set to "Website" (highlighted with a black circle and the number 2). The "Web Domain" is set to "(Web Site)". Under "New Account Options", the radio button for "Create New Login On Website" is selected (highlighted with a black circle and the number 3). The "Account Settings" section includes an "Email" field with the value "joebloggs@findesolutions.com" (highlighted with a black circle and the number 4), a "Web Account ID" field, and a "Notes" field. Below these fields, a message states "Customer must reset password on first login." At the bottom of the window, there is a "Delivery Sites" section with an empty list box and buttons for "Add...", "Details...", and "Remove". At the very bottom, there are checkboxes for "Expired" and "Show Prices" (which is checked), and "Cancel" and "Save" buttons.

Result

The customer's website account will be created automatically after you save the record, provided the website integration supports this functionality.