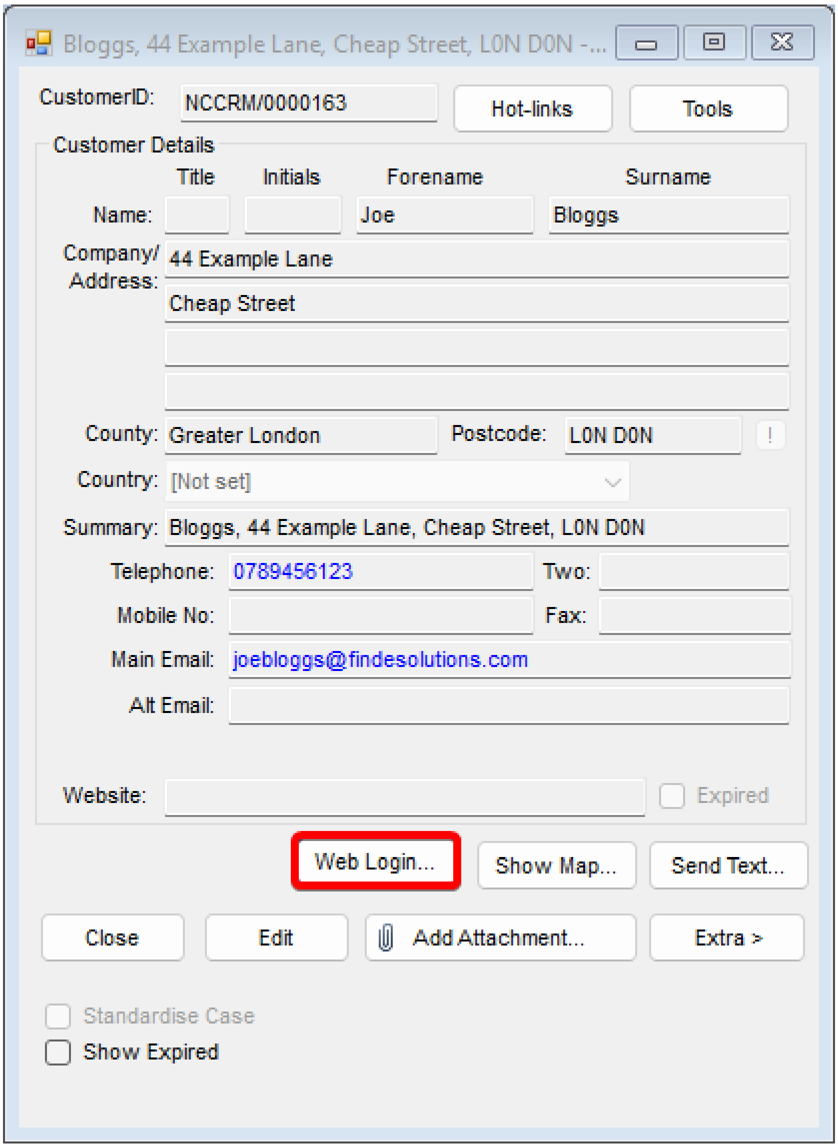
Creating a Trade Account for a Customer

Overview

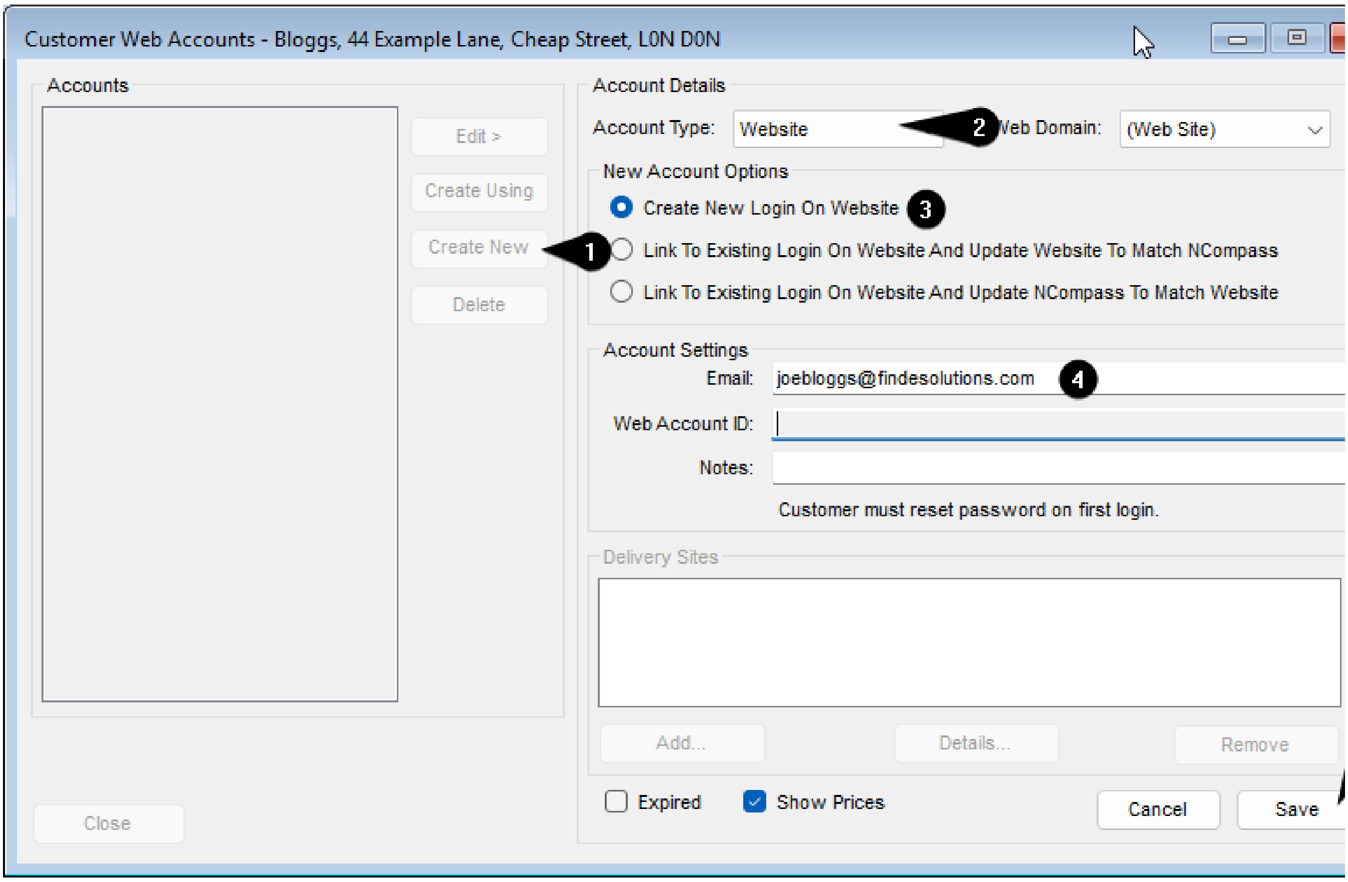
If a customer does not currently have a trade account on your website, you can create one through Ncompass. Once created, the customer will be able to access the website using their new login details.

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.



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**.



Result

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

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