

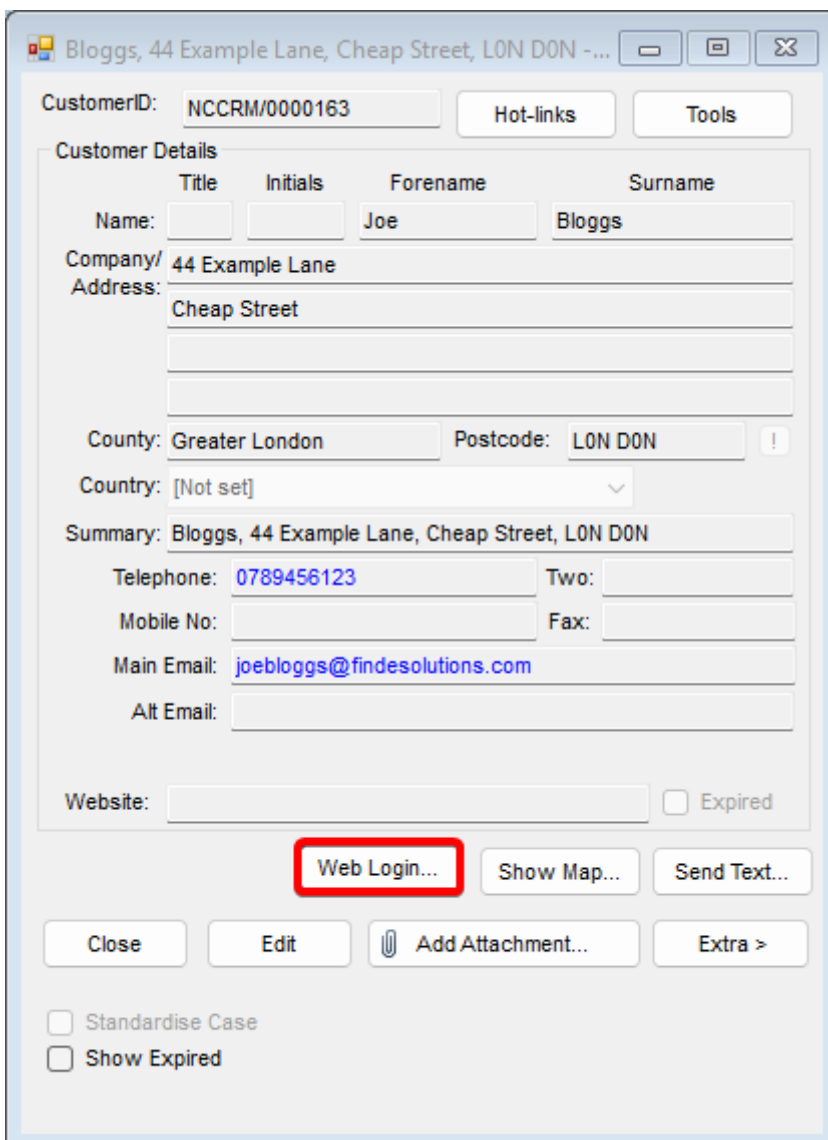
Creating a Trade Account for a Customer

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 D0N -...". The form displays customer details for "Joe Bloggs" with CustomerID "NCCRM/0000163". The "Web Login..." button is highlighted with a red rectangle. Below the form are checkboxes for "Standardise Case" and "Show Expired".

Customer Details			
Title	Initials	Forename	Surname
		Joe	Bloggs
Company/Address: 44 Example Lane			
Cheap Street			
County: Greater London		Postcode: LON D0N	
Country: [Not set]			
Summary: Bloggs, 44 Example Lane, Cheap Street, LON D0N			
Telephone: 0789456123		Two:	
Mobile No:		Fax:	
Main Email: joebloggs@findesolutions.com			
Alt Email:			
Website:			
☐ Expired			
Web Login...			
Show Map...			
Send Text...			
Close			
Edit			
Add Attachment...			
Extra >			
☐ 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 "Accounts" header, is a large empty list box. To its right are four buttons: "Edit >", "Create Using", "Create New" (highlighted with a black circle and the number 1), and "Delete". On the right side of the window, there are several form sections. The "Account Details" section has "Account Type" set to "Website" (highlighted with a black circle and the number 2) and "Web Domain" set to "(Web Site)". Below this is the "New Account Options" section, where "Create New Login On Website" is selected with a radio button (highlighted with a black circle and the number 3). The "Account Settings" section has an "Email" field containing "joebloggs@findesolutions.com" (highlighted with a black circle and the number 4), an empty "Web Account ID" field, and an empty "Notes" field. Below the "Notes" field is a message: "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 "Add...", "Details...", and "Remove". At the very bottom are checkboxes for "Expired" (unchecked) and "Show Prices" (checked), along with "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.

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