



B2BeCONNECT
For WooCommerce

USER MANUAL

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INTRODUCTION

B2BeCONNECT for WooCommerce is a full-fledged B2B WooCommerce plugin by InSync Tech-Fin Solutions Ltd., that transforms a simple WooCommerce store into a complete wholesale eCommerce store.

The built-in API of this plugins lets you integrate your WooCommerce store with any application in the world.

SETUP

In order to setup this plugin, just go to **Plugins -> Add New** from your WordPress dashboard. Click **Upload Plugin**, select the `.zip` plugin folder and click on **Install Now**.

Once the installation is complete, click on **Activate**.

Caution:

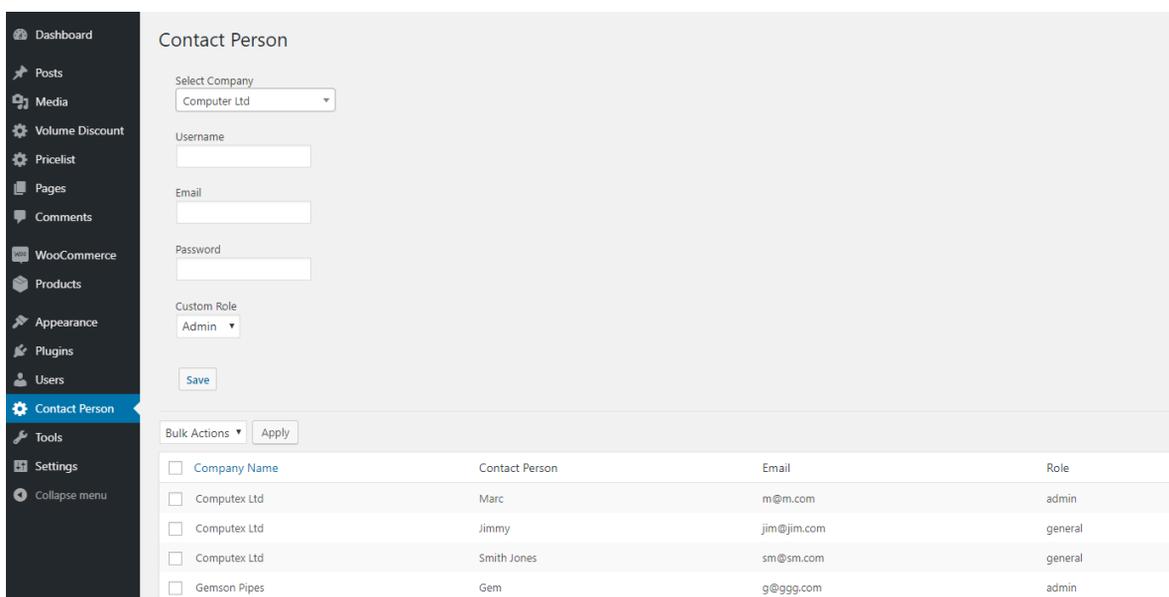
Deleting this plugin will completely delete all the custom data created by this plugin.

1. COMPANY & CONTACT PERSONS

In a B2B business model, a Company is the main entity who purchases products from an online store. But the Company doesn't login directly into the ecommerce store and place orders. The contact persons of a company place orders on behalf of the company.

In B2BeCONNECT, you can define a company in the same way as adding a **new user**.

After adding a new user, select the **Customer Type** as **B2B** under **Account Management**. Its recommended to provide the **Username & First Name** as the Company Name and provide the complete **Company's billing and shipping** address. Now once the Company has been created, you can create the Contact Persons from the **Contact Person** menu.



<input type="checkbox"/>	Company Name	Contact Person	Email	Role
<input type="checkbox"/>	Computex Ltd	Marc	m@m.com	admin
<input type="checkbox"/>	Computex Ltd	Jimmy	jim@jim.com	general
<input type="checkbox"/>	Computex Ltd	Smith Jones	sm@sm.com	general
<input type="checkbox"/>	Gemson Pipes	Gem	g@ggg.com	admin

Select the **Company** from the drop-down list, provide the **Username, Email, Password, Custom Role** and click on **Save**.

CUSTOM ROLES:

Admin: Contact person with this role can add other contact persons and can view all the orders within their Company

Order	Date	Status	Total	Actions
#320	August 7, 2019	Completed	\$25.00 for 3 items	View
#317	August 7, 2019	Completed	\$25.00 for 3 items	View

Create Contact Persons

Username	Email
<input type="text"/>	<input type="text"/>
Password	Custom Role
<input type="text"/>	<input type="text" value="Admin"/>
<input type="button" value="Save"/>	

Other Orders by the Company

Order	Date	Status	Total	Contact Person
318	2019-08-07	completed	\$59.50	jimmy

Contact Persons List

User	Email	Role
<input type="checkbox"/> Huges	hhh@hhh.com	general
<input type="checkbox"/> Jimmy	jim@jim.com	general

The **Bulk Actions** in the Contact Persons list enable you to **delete** contact persons in bulk and **change the role** from Admin to General and vice versa.

General: Contact person can only view their own orders within their company.

2. CREDIT LIMIT

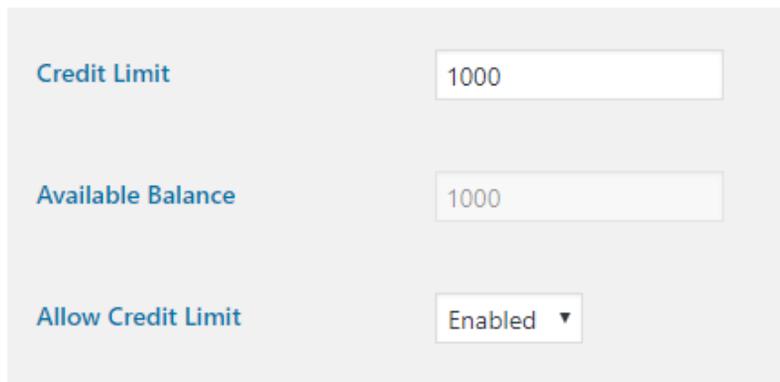
Credit Limit feature allows a buyer to buy goods on credit and pay later. In B2B ecommerce world, it is an important aspect to keep good relationships with wholesale buyers. In order to make customers happy, credit limit can be used as a payment method to let people pay afterwards in bulk for all their orders.

Also, in some countries, payment options like Net30 and Net60 allow users to pay after 30 and 60 days respectively.

Street address *	Total	\$70.00
<input type="text" value="House number and street name"/>	<input type="radio"/> Direct bank transfer	
<input type="text" value="Apartment, suite, unit etc. (optional)"/>		
Town / City *		
State / County *		
<input type="text" value="Select an option..."/>		
Postcode / ZIP *	<input type="radio"/> Check payments	
<input type="text"/>	<input type="radio"/> Cash on delivery	
Phone *	<input checked="" type="radio"/> Credit Limit	
<input type="text"/>	<p>Your personal data will be used to process your order, support your experience throughout this website, and for other purposes described in our privacy policy.</p> <input type="button" value="Place order"/>	
Email address *		
<input type="text" value="soumitra.c@insync.co.in"/>		
Ship to a different address? <input type="checkbox"/>		

Through B2BeCONNECT, you can enable/disable the Credit Limit feature for companies and specify the credit limit.

Under **Users -> All Users**, edit any B2B company and under the Account Management, you will find **Credit Limit, Available Balance** and **Allow Credit Limit** option.



Here you can specify the amount to be credited to the buyer’s account and whether to enable the credit limit. The available balance will be automatically calculated based on the Credit Limit usage.

To enable/disable Credit Limit at a global level, please go to **WooCommerce -> Settings -> Payments**

Method	Enabled	Description	
☰ ^ v Direct bank transfer	<input checked="" type="checkbox"/>	Take payments in person via BACS. More commonly known as direct bank/wire transfer	Manage
☰ ^ v Check payments	<input checked="" type="checkbox"/>	Take payments in person via checks. This offline gateway can also be useful to test purchases.	Manage
☰ ^ v Cash on delivery	<input checked="" type="checkbox"/>	Have your customers pay with cash (or by other means) upon delivery.	Manage
☰ ^ v PayPal	<input type="checkbox"/>	PayPal Standard redirects customers to PayPal to enter their payment information.	Set up
☰ ^ v PayPal Checkout	<input type="checkbox"/>	Allow customers to conveniently checkout directly with PayPal.	Set up
☰ ^ v Credit Limit	<input checked="" type="checkbox"/>		Manage

Save changes

Here you can **enable/disable** the Credit Limit feature globally.

Credit Limit

Enable/Disable Enable Credit Limit

Order Status After The Checkout

The default order status if credit limit is enabled. It is recommended to not to keep the status as complete, since making an order status complete adds the deducted price in the available balance of the customer

[Save changes](#)

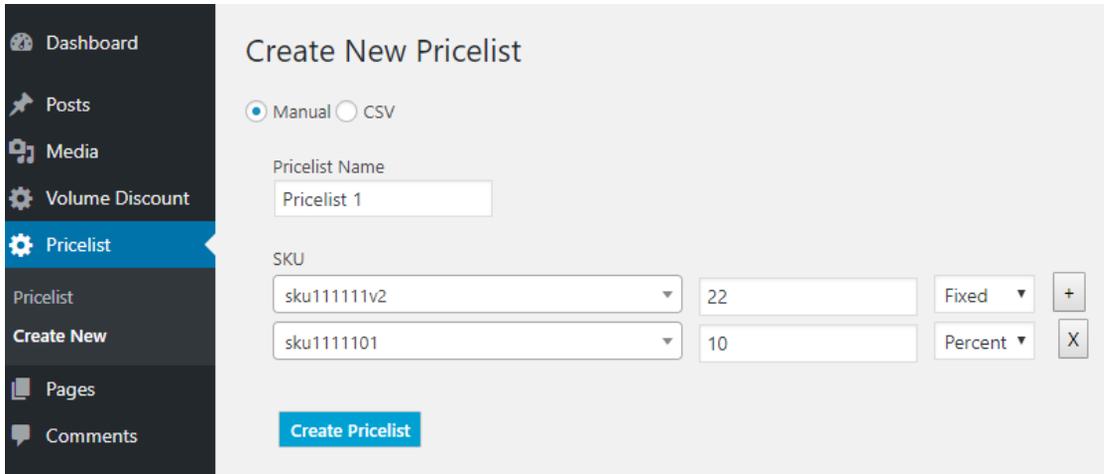
The **Manage** screen lets you define the **Order Status** after the order is placed through Credit Limit.

Note: *It is highly recommended to keep the order status anything other than “Completed”. The main reason behind this is that once you make an order complete, the deducted amount gets added to the user’s available balance.*

3. PRICELIST

Using the B2BeCONNECT Pricelist feature you will be able to show different prices to different companies (customers) for the same product. There are three ways to assign a pricelist to a customer:

- **Manual**
- **Bulk CSV Upload**
- **API Integration with ERP**



To create a pricelist manually, go to **Pricelist -> Create New**.

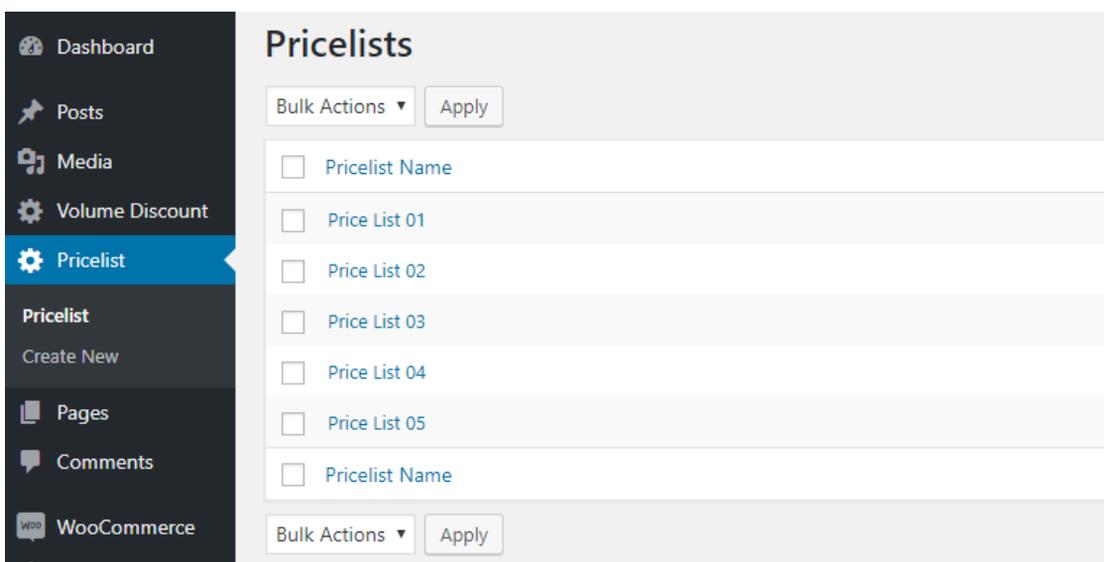
The **Manual** option will be selected as default. **Provide a name**, search and enter the product **SKU**, set the **price** and finally select the **Type**.

The **Fixed** and **Percent** types determine whether the price will be a fixed value price or some percentage of the original value price.

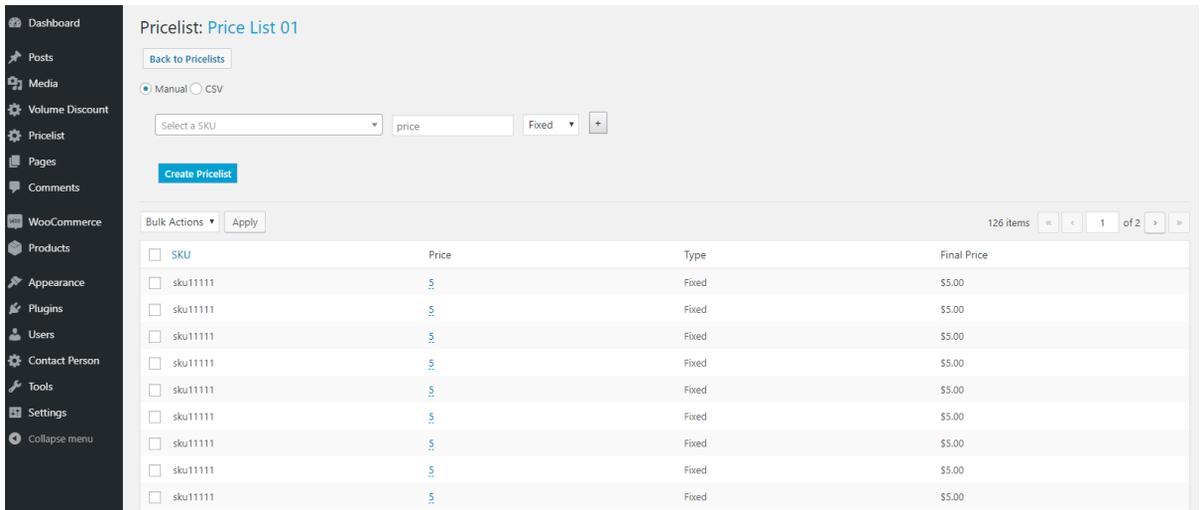
You can add multiple entries through the **+** button.

Finally click on **Create Pricelist**.

The pricelist will be created under **Pricelist** menu.

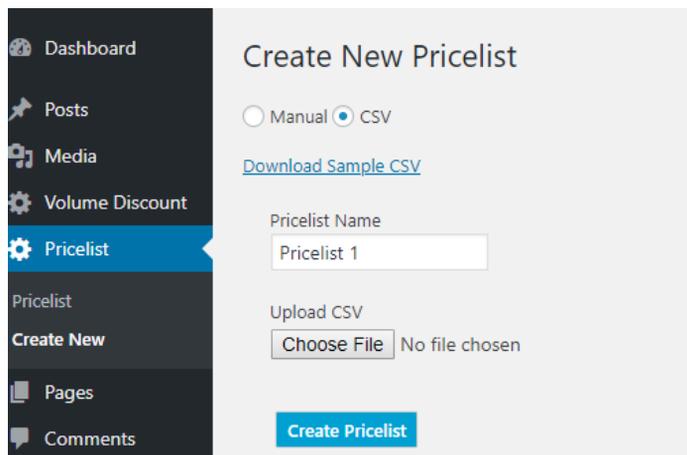


To add or delete a price from the pricelist, just click on the specific pricelist. Here you can add or delete the defined prices for the pricelist.



The screenshot shows the 'Pricelist: Price List 01' management page. It includes a sidebar with navigation options like Dashboard, Posts, Media, Volume Discount, Pricelist, Pages, Comments, WooCommerce, Products, Appearance, Plugins, Users, Contact Person, Tools, Settings, and Collapse menu. The main content area features a 'Back to Pricelists' button, radio buttons for 'Manual' (selected) and 'CSV', a 'Select a SKU' dropdown, a 'price' input field, a 'Fixed' type dropdown, and a '+', and a 'Create Pricelist' button. Below this is a table with columns for 'SKU', 'Price', 'Type', and 'Final Price', containing 126 items. A 'Bulk Actions' dropdown and 'Apply' button are also visible.

In order to create pricelist using the bulk CSV upload, just select the **CSV** option on the **Create Pricelist** page



The screenshot shows the 'Create New Pricelist' form. It includes a sidebar with navigation options like Dashboard, Posts, Media, Volume Discount, Pricelist, Pages, and Comments. The main content area features a 'Create New Pricelist' title, radio buttons for 'Manual' and 'CSV' (selected), a 'Download Sample CSV' link, a 'Pricelist Name' input field with the value 'Pricelist 1', an 'Upload CSV' section with a 'Choose File' button and the text 'No file chosen', and a 'Create Pricelist' button.

Here you need to download the sample CSV and fill it up with the required data.

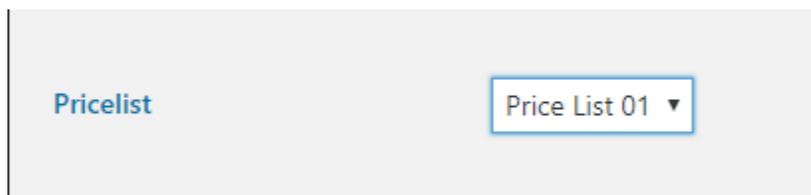
	A	B	C	D
1	SKU	Price (without currency symbol)	Type (Fixed/Percent)	
2	sku11111		5 Fixed	
3	sku11112		10 Fixed	
4	sku11113		10 Fixed	
5	sku11114		20 Fixed	
6				
7				
8				
9				
10				
11				

After filling with the required data, **provide a name**.

Upload the file and click on **Create Pricelist**

Caution: In case you are using CSV upload to edit an already created Pricelist. This will wipe out the previously created prices with the ones in the CSV.

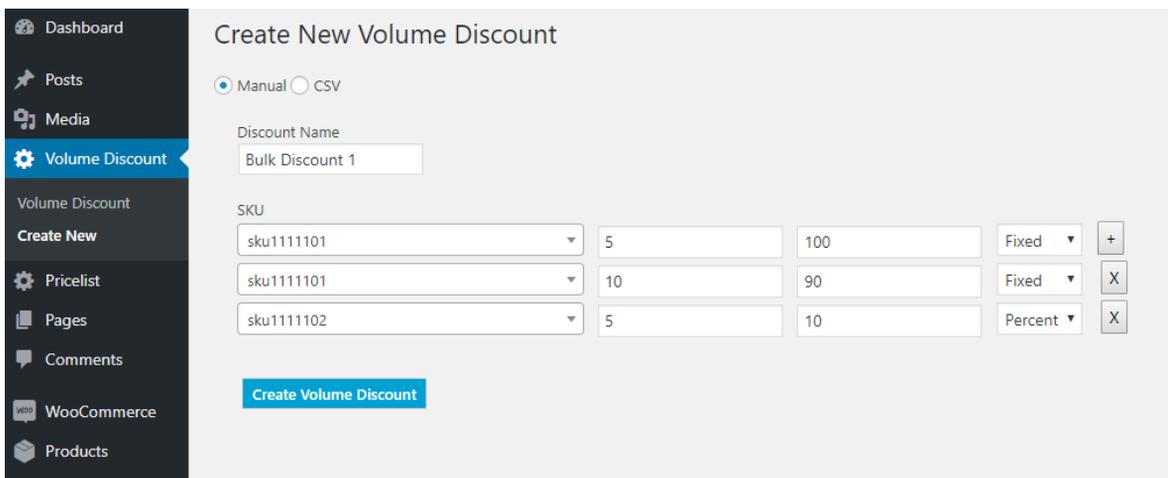
Finally, you can assign the pricelist by **editing** a Company (user) and selecting the pricelist.



4. VOLUME DISCOUNT

Sometimes, it becomes necessary to provide volume discount or tier pricing for B2B customers. For example, buy 3 items at \$100 each or buy more than 5 items at \$75 each. Here is where the volume discount feature in B2BeCONNECT comes into play.

Using B2BeCONNECT, you can create volume discounts customer-wise and product-wise. To create a Volume Discount, please go to **Volume Discount -> Create New**. This page is same as creating pricelists.



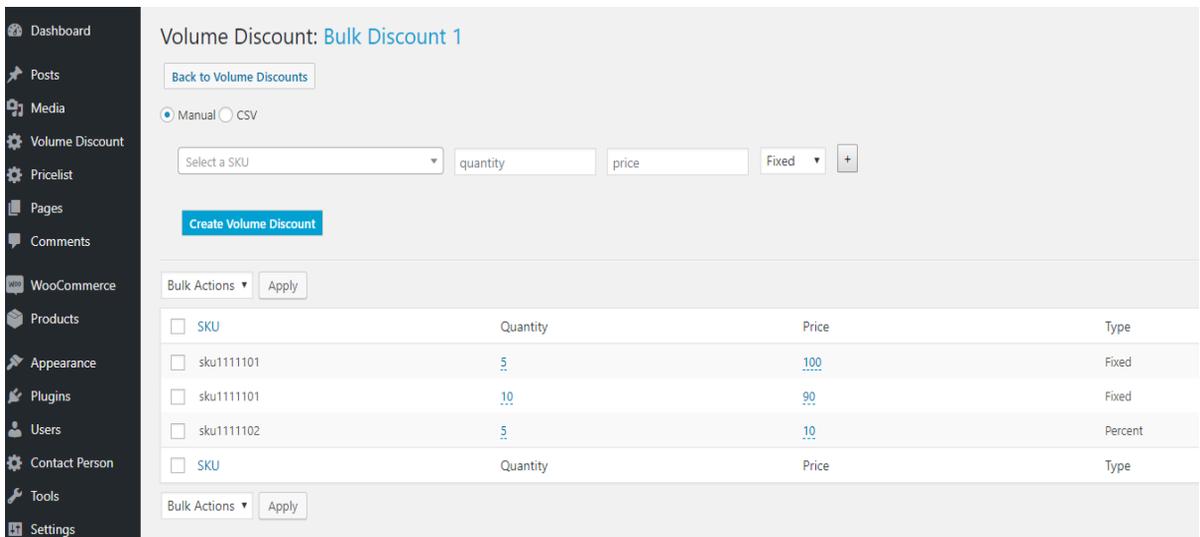
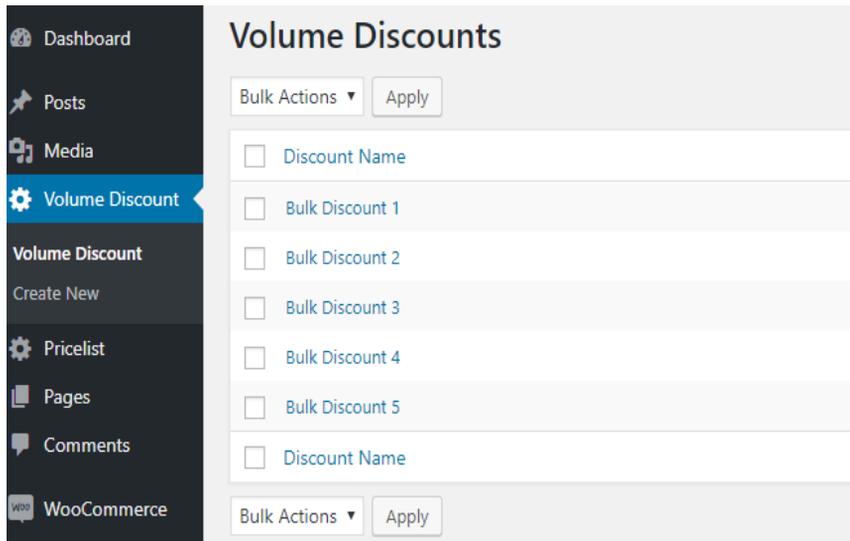
Manually you can provide the **Name**, specify the **SKU**, specify the **tier or number of items** for which the discount will be applicable, **the discounted price**, either **Fixed** or **Percent** of the base value or Pricelist value (if applicable).

Like pricelist you can add multiple entries using the '+' button.

The **CSV** upload format is:

	A	B	C	D	E
1	SKU	Quantity	Price (without currency s	Type (Fixed/Percent)	
2	sku11111	5	5	Fixed	
3	sku11112	10	5	Fixed	
4	sku11113	5	10	Fixed	
5	sku11114	7	9.99	Fixed	
6	sku11115	5	9.99	Fixed	
7	sku11116	5	9.99	Fixed	
8	sku11117	5	9.99	Fixed	
9	sku11118	5	19.99	Fixed	
10	sku11119	5	19.99	Fixed	
11	sku11110	3	19.99	Fixed	
12	sku11111	3	19.99	Fixed	
13	sku11112	3	15	Fixed	
14	sku11111	3	15	Fixed	
15	sku11111	3	15	Fixed	
16	sku11111	5	5	Fixed	
17	sku11112	10	5	Fixed	
18	sku11113	5	10	Fixed	
19	sku11114	7	9.99	Fixed	
20	sku11115	5	9.99	Fixed	
21	sku11116	5	9.99	Fixed	
22	sku11117	5	9.99	Fixed	

After the Volume Discount is created, it can be found under **Volume Discount** menu



Stay tuned for more features.

For any feedback or suggestions, please email us at:

marketing@insync.co.in



B2BeCONNECT
For WooCommerce

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