B2BECONNECT MOBILE APP

USER GUIDE

We Connect. You Grow.

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Introduction

B2BeCONNECT is a B2B E-Commerce Solution that helps transform your E-Commerce Store (Magento, WooCommerce, Shopify, etc.) into a feature-rich B2B Platform. B2BeCONNECT also offers a Mobile Application (currently supporting Magento E-Commerce) to help B2B retailers and wholesalers delight their business buyers by riding the Mobile Commerce tide! The application eases the process of Product Management, Order Placement and Shipment to saves a lot of valuable time.

This guide will provide an overview of the [B2BECONNECT mobile application](#) which is now available in the Google Play Store. You'll learn about the new features, accessibility, usage and management of the Mobile Application and thus can place your orders from anywhere.
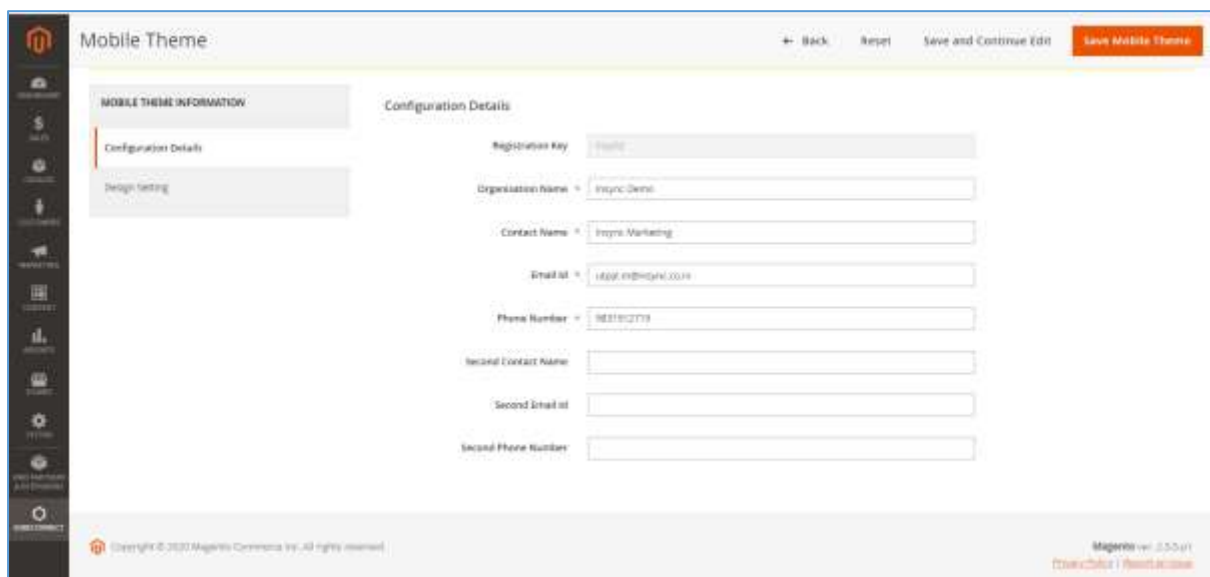
B2BeCONNECT Admin Configuration – Generating Authentication Key

For configurations, the backend of the Ecommerce store will allow configuring the Authentication Key for the users - **Sales Representative** and **Contact Person.**

Note- To access the admin panel, use the Magento Admin URL and login to your application

1. Login with your Admin User Id and Password.
2. Go to the Magento Admin Panel, click on *B2BeCONNECT* on the lower-left pane of the window. Another side-pane will open - scroll down to the **Mobile Theme Section**.
3. To generate the Registration Key and change the *mobile theme*, follow the steps.
4. Click on the *Mobile Theme Information* section and you will get two separate tabs - **Configuration Details and Design Setting.**
5. Click on the Configuration Details tab to fill the mandatory details.
   The mandatory fields are – Organization Name, Contact Name, Email Id and Phone Number.

   Configuration Details Mobile Theme

6. You can generate the Registration key after submitting the mandatory fields and send this key to your customer for mobile app installation.

7. Click on the Design Setting Tab and the following window appears. This section enables you to change the color and design themes of your mobile application. The mandatory sections are – Text Color and Background Color.

Admin- Design Setting Mobile Theme
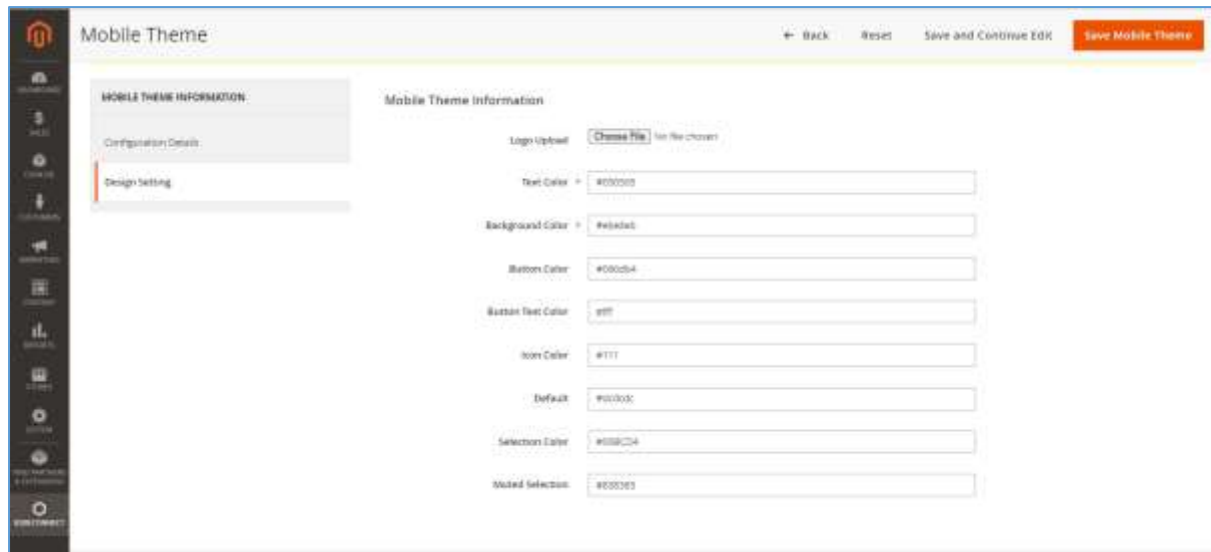
8. Once the details are filled in both the tabs, click on the **Save Mobile Theme** button.
9. Under the Configuration Details tab, you can now view that the *Registration Key is automatically generated.*

Note: The Registration Key remains unique for each organization, generated by the admin of the organization. This is required as an input before logging into the application either as a Sales Representative or a Contact Person.

Downloading and Installing the Android App

InSync has launched the B2BECONNECT mobile application. You can easily download it from the Play Store of your android smartphone and get going with the easy process.

User Category

Broadly divided into two B2B user categories

(A)   Sales Representative

Sales representatives work with customers to find what they want, create solutions and ensure a smooth sales process. A sales representative can be associated to multiple customers which means he/she can manage multiple sales processes of different customers simultaneously. Sales Rep

accounts are associated with customer accounts so that they can place orders on behalf of the customer account.

(B)   Contact Person

A contact person is a point of contact between an organization (customer) and client. He/she represents an organization and executes various business processes on behalf of the organization. There can be more than one contact persons belonging to an organization.

User Authentication

Authentication Process is required for users who will be logging into the B2BeCONNECT mobile application after installation. A unique Authentication Key is required which will be obtained from the admin. After installing the app, input the key details and you will be authenticated and redirected to the login page of the mobile application.

(a) First, a splash screen will appear after installing the application.

(b) In the next screen, you will have to put the Authentication Key.

Splash Screen

Authentication Screen

User Login

Once the Authentication Process is complete, the login screen appears. Sales Representative and Contact Person can login with their account details by providing the email and password and clicking on the *Sign-In* button. You can also view Magento Password Policy.

Accessing Dashboard

(a) **Sales Representative Login** – Once signed in, they will be redirected to the organization, from where they have to choose an organization and then choose the contact person. Once done, they will be redirected to the dashboard/home screen.

(b) **Contact Person Login** - Once signed-in, they will be redirected to the dashboard/home screen.

Sales Representative - Accessing Dashboard
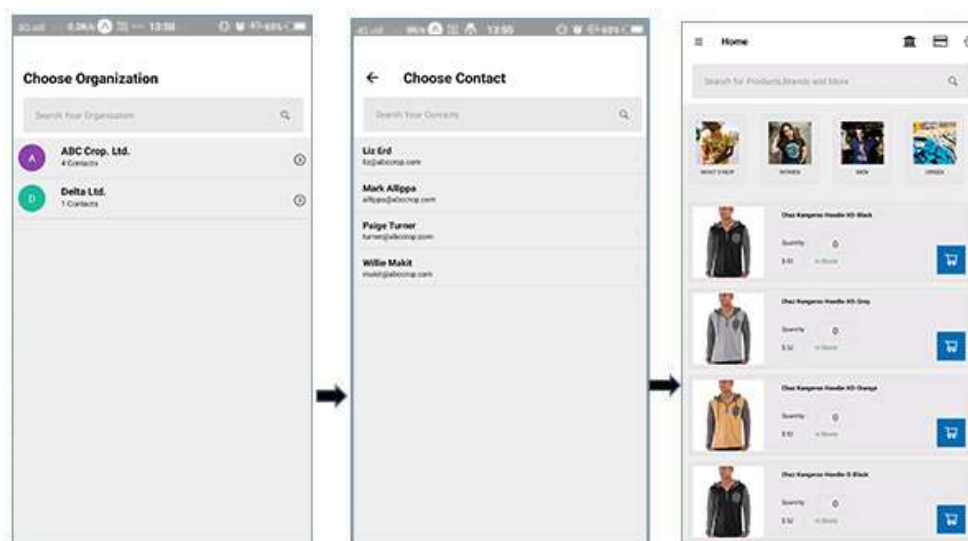
1) **Sales Representative**: Sign In>> Choose Organization >> Choose Contact Person>> Dashboard/Home Screen

2) **Contact Person**: Sign In>> Dashboard/Home Screen

Available Buttons in the Application

(A) Login through **Sales Representative Credentials** - Three buttons are present in most of the screens in the application on the upper right corner of the screen.
- **Choose Organization** – This takes you to the choosing organization section.
- **My Orders** - This takes you to the *My Orders* section.
- **Shopping Cart** – This takes you to the *Shopping Cart* section

Available Button List
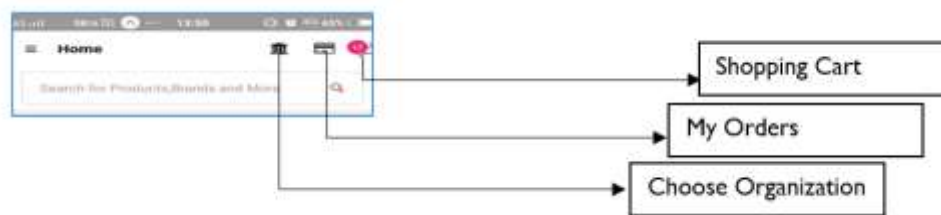
(B) Login though **Contact Person Credentials** - Two buttons are present in most of the screens in the application on the upper-right corner of the screen.
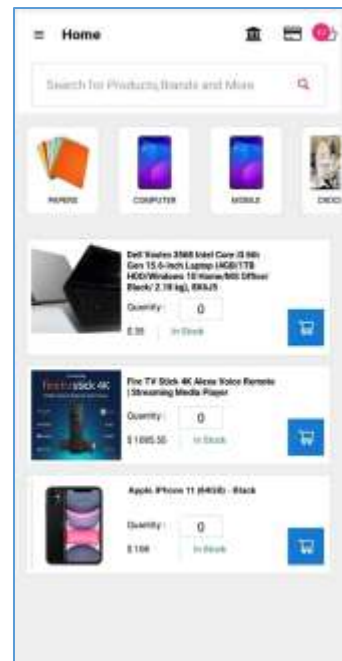- **My Orders** - This takes you to the *My Orders* section.
- **Shopping Cart** – This takes you to the *Shopping Cart* section

Home/

A typical home/dashboard screen comprises of two main views –

(a) One is a horizontal slider view of the Product Category. The enlisted category can be viewed by sliding the horizontal bar. Clicking on the category will take you a new screen of **Product Category** where subcategories (if present under a category) will be displayed, under which the product will be listed. Else, you can also view the product directly if it is available under any category.

(b) Second, is the vertical scroll view of product which are not displayed under any category.

(c) Third, is the Search Option – Search Product, Brands and more with a single click.

Customers can check the available products by clicking any category or subcategory, clicking directly on the products displayed or by using Search Option.

Menu

(a) This section enlists the Home Screen, My Order Screen and Logging Out options.

(b) Clicking on the Home option will redirect you to the home screen.

(c) Clicking on the My Order option will redirect you to the *My Orders* Screen

(d) Logging out will enable you to log out from the application.

(e) The above bar displays the login information of the B2B Customer, mainly the email id.

Note: The Menu Screen has a slider to Home Screen, so you can slide and go to the Home Screen and vice-versa
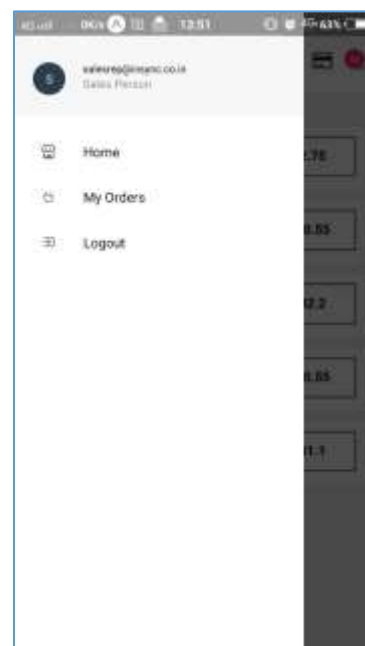
Product Categories

Here you will get the detailed description of the product category and subcategory you are searching for. This section of the screen gives the product details enlisted with each category and subcategory.

(a) **Search Option** – Search Product, Brands and more
(b) **Subcategory** - Horizontal Scroll Bar is available, clicking on this page will take you to the product list page which is under that subcategory.
(c) **Product List** – Here you can add the product quantity and add to cart directly.
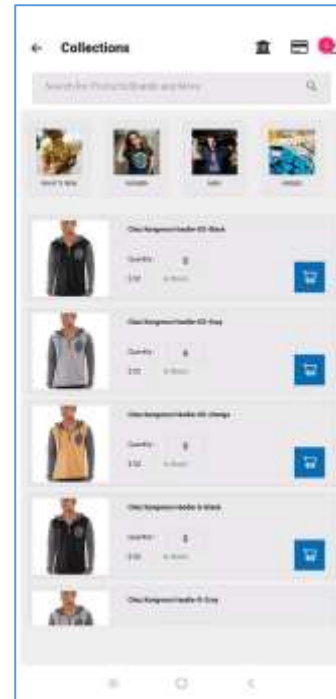
Product Details

Here you will get the detailed description of the product you are searching for. This section of the screen gives the product details, once you click on any product you want to have a view of.

(a) **Product Image** is given to view the product
(b) **Product details** are given
(c) **Quantity** is given – You can add the quantity of purchase directly from here.
(d) **Add to Cart** – This option is present, to help you add products directly to your cart. You can view your product added to the cart through the Shopping Cart button present on the upper-right corner of the screen. This will add in numbers when you add any product to your cart.
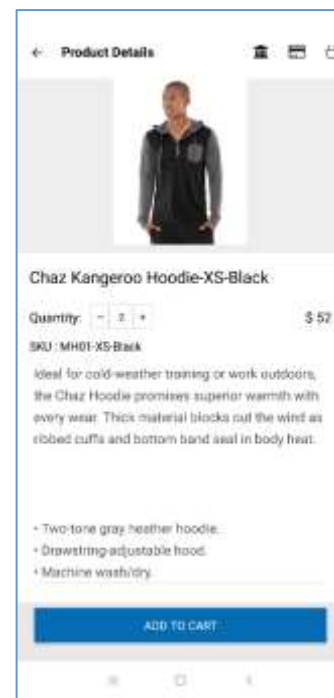
Shopping Cart

Once you have placed your order and done with *Add to Cart*, you are redirected to the Shopping Cart Section. You can access this screen from any of the screens you are in, by clicking on the [Shopping Cart button] present on the upper-right corner of the screen.

Here you can view the following details:

(a) **Cart Subtotal** – The total amount of the product/products placed in your cart.
(b) Two Sub-menus- **Place Order and Update Order**.
  - Place Order – For placing the Orders, click on this button. This will take you to the select [Shipping Address Screen].
  - Update Order- For any changes done in the product quantity and to apply the same to Order Summary, always click on the *Update Order* button.
(c) **Product Display with Quantity** – Here you can increase and decrease the product quantity before placing the final orders.
(d) **Delete Button** - Here you can also delete a product from the cart, before placing the order.
(e) **Enter Coupon Code** – You can manually enter your coupon code in the box provided and the applicable code will apply to your order amount.

Order Summary – Here you will get to see the final order summary before placing the orders.
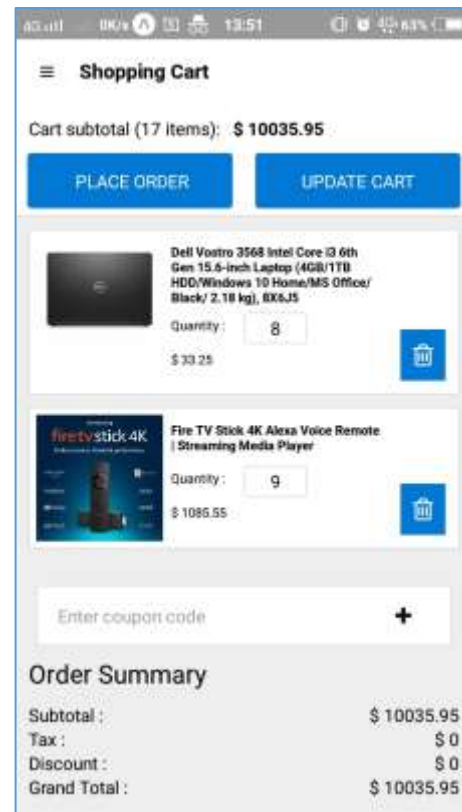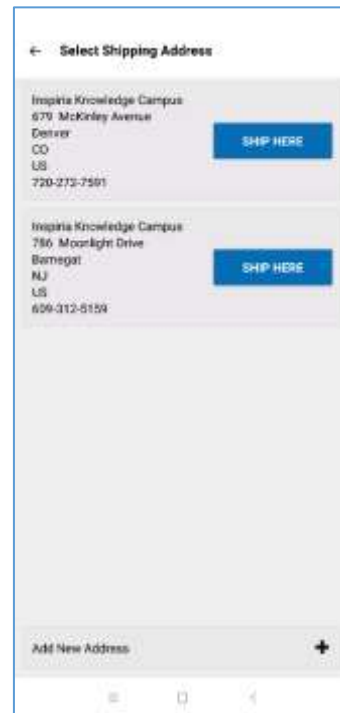
Shipping Address

This section of the screen enables you to add a shipping address to ship your orders. You can add one or more addresses if required and can choose one address for shipping the orders at a time.
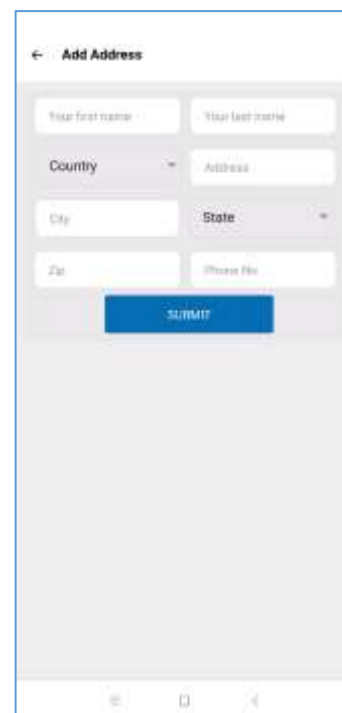
Here you can view the following details:

(a) **Shipping Address Listing Details** of the user.

(b) **Ship Here Button** – This is available with respect to every address. Once you click on the Ship Here button, this will take you to Select Billing Address Screen.

(c) **Add New Address** – This button takes you to a separate screen of Adding Address. Add the address and click *Submit*; it will get reflected under select shipping address.

Add New Address

This section enables you to add your shipping address details. This contains address information like – Name, Country, City, etc. as given in the screen. Click *Submit* once done.
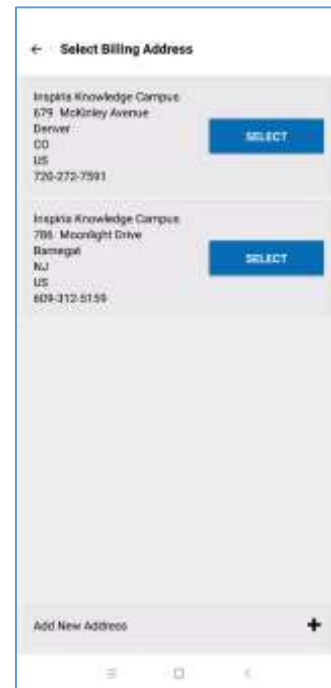
Select Billing Address

After choosing your Shipping Address, click on the *Ship Here* button and this screen appears. This looks similar to the Select Shipping Address section.

Here you can view the following details:

(a) **Billing Address Listing Details** of the user.

(b) **Select Button** – This is available with respect to every billing address. Once you click on the Select button, this will take you to **Shipping Method** Screen.

(c) **Add New Address** – This button takes you to a separate screen of Adding Address. Add the Address and click *Submit*; it will get reflected under the *Select Billing Address* section.

Note: Shipping and Billing Address can be same for the user or different.

Shipping Method

After Choosing the Billing Address,

(a) Click on the *Select* button and you are redirected to the *Shipping Method* screen where you can choose the shipping method by selecting the radio button.
(b) Shipping methods can be Flat Rate, FreeShipping, USPS, FedEx, etc. as configured in your Magento application.
(c) Once done, click on *Proceed*. This will redirect you to the *Payment Method* Screen.
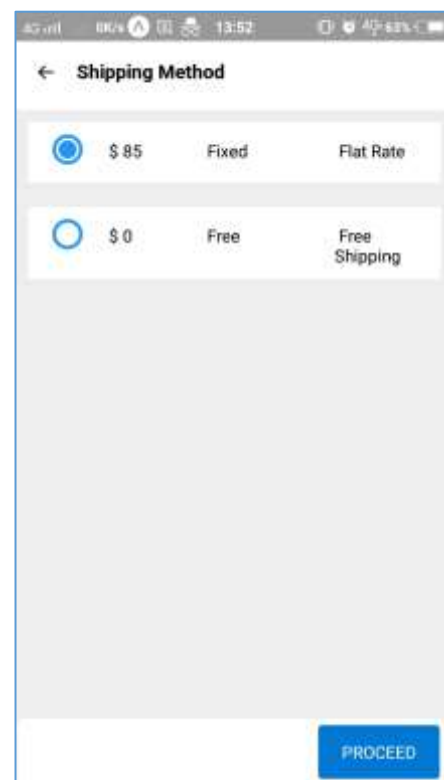
Payment Method

This section enables you to select the payment methods for your placed order.

(a) A radio button is placed against the payment methods where you can place your order and make payment. (PayPal Express Checkout, Braintree, PayPal All-in-One Payment Solutions, etc.)

(b) Click on the *Place Order* button.
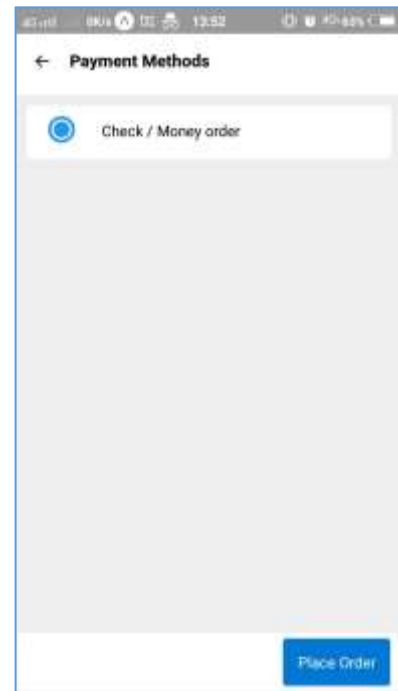
Order Confirmation

This is the *Order Confirmation* Screen. Here you can view the following details

(a) A **thank you message** displaying the order has been received by the merchant
(b) **Order Number**: Unique for every order
(c) **Order Pricing Details** – Includes subtotal, shipping and handling, discount and total price
(d) Your **Delivery Address Details**

My Orders

Here you can view your *Order History* details. This screen is accessible from any screen you are in, by clicking in the *My Order* Button present on the upper-right corner of the screen.

(a) Here the **order listing** view is available – Only the "last five orders list is available presently."
(b) The existing credit limit is displayed here.
(c) Order with status, date and amount is displayed.
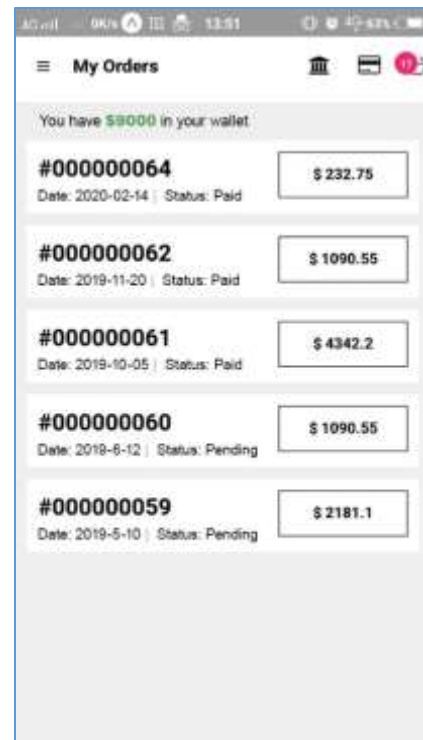
B2BeCONNECT Mobile App Demo guide

GETTING STARTED WITH THE DEMO

- Downloading and Installing the Android App
- Splash Screen
- User Authentication
- User Login

DOWNLOADING AND INSTALLING THE APP

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USER AUTHENTICATION

Authentication process is required for users who will be logging into the B2BeCONNECT mobile application after installation. A unique Authentication Key is required which will be obtained from the admin.

For taking the demo use this Registration Key - Insy02

NOTE: After the registration is complete, login to the application

USER LOGIN

Once the authentication process is complete, the login screen appears. Sales Representative and Contact Person can login with their account details by providing the email and password and clicking on the *Sign In* button.

CONTACT PERSON

User id: contact-person@insync.co.in

Password: abcd.1234

SALES REPRESENTATIVE

User id: salesrep@insync.co.in

Password: abcd.1234

Now you are all set to use the B2BeCONNECT Mobile Application at your fingertips and can place your order at the go. Both Sales Representative and Contact Person can place orders through this application. This application helps in rendering a better service of order placement and shipping as everything is monitored by the admin, that too with the help of an application that works on your phone.

Currently, all the data are synced with the website.

B2BℓCONNECT

Transform your Digital Commerce Deliver more value to your B2B buyers, quicker than the competition with the help of B2BeCONNECT mobile app experience.

To get started with B2B Ecommerce, or for any further assistance

CONNECT WITH US >

You can also email us at support@insync.co.in