B2B Portal

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B2B Portal

DEAR Inventory B2B portal has been designed to enable your customers to browse and order from your catalogue 24/7.

Setting up your portal

To begin setting up your custom B2B portal please navigate to Integration>DEAR B2B portals.

Add New Shop

Here you can name your portal (for internal use) and also specify a unique domain name which will be used by your customers to access the portal.

Click "Add new Portal" when ready and repeat this process for as many portals as you would like to add. You may consider

Setup

General Settings

In this section you can manage the settings for all custom portals you have added to DEAR Inventory.

Manage portal drop down allows you to switch between the different portals connected to DEAR, make sure you are in the correct portal before making any changes to the settings.

General settings

Your store URL	https://ecommerce.dearportal.com *i*
Is active	☑ *i*
Allow backorder	☐ *i*
*Portal type	B2B *i*
Portal Contacts	DEFAULT billing contact *i*
Portal Address	1 Kent Street *i*
Portal Location	Main Warehouse *i*
Show product images in Shopping cart	☐ *i*
Sales Representative	*i*
*Create Sale As	Authorised Quote *i*
Default Revenue Account	choose... *i*

Your store URL is a link to your custom B2B portal.

Is active tick box allows you to activate/deactivate the portal. Once portal is deactivated your customers are no longer able to login and browse your products. You may consider deactivating the account during maintenance of the product listings or any other changes being implemented.

Portal Type is an option to switch between B2B and B2C modes. Please note initial release contains B2B mode only.

Portal Contacts here you can select your Company Contact's details to be displayed in the footer of the portal. Company contacts can be managed in Settings>Reference Books>Company Contacts.

Portal Address allows you to select one of the Company Addresses to be displayed in the footer of the portal. Company addresses can be managed in Settings>Reference Books>Company Addresses.

Portal Location is one of the locations you have setup in DEAR to manage your inventory. Orders placed by customers via the portal will be automatically marked for fulfilment from the specified location. The location can however be amended at the time of performing the Pick for the Order or changed in the Sale Order header. You can manage locations in Settings>Reference Books>Locations and Bins.

Show product images in Shopping Cart will allow you to toggle whether the customers will see product images in the shopping cart.

Sales Representative allows you to populate sales representative you would like to associate with the sale orders generated via portal. Sales Representative is a text field.

Create Sale As sales created via portal can be automatically created in DEAR in 3 stages

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- Authorised Quote – does not reserve inventory and is a quote only.
- Authorised Order – reserves inventory for the order and is ready for fulfilment steps Pick, Pack, Ship and invoicing.
- Authorised Invoice – reserves inventory for the order and is ready for fulfilment steps Pick, Pack, Ship with customer invoice authorised and available for sync to your accounting application.

Default revenue account is an account in Chart of Accounts that will be used to attribute the portal sales. If left blank, product, customer or default account mapping will apply to sale generated via the portal.

Navigation bars

Navigation bars will determine how customers browse your products in the portal. Horizontal and vertical bars can be used simultaneously to display Categories, Tags or Brands.

First select what type of data you would like to show in Horizontal or Vertical navigation bars or whether you would like to disable one or both navigation bars.

Click **Add** to select from one of the options Categories, Tags or Brands.

Navigation bars *i*

*Horizontal	Categories		*Vertical	Brands	
⊕ Add			⊕ Add		
Item			**Item**		
T Shirt		🗑	Apple		🗑
Jackets		🗑	Combat Sports		🗑
			Generic Brand		🗑

Horizontal bar will display options at the top of the B2B screen.

Vertical bar will display options on the left side of the B2B screen.

Follow us

Here you can specify the URLs of all platforms you use to communicate with your customer base.

Follow us

Facebook	http://www.facebook.com
Google+	http://www.googleplus.com
Twitter	https://twitter.com
Instagram	https://www.instagram.com

Shipping methods

In this section you can create all Shipping Methods available for customers using your B2B portal.

Click **Shipping Method** and enter the Name, Amount and mark Shipping Method as active.

Tax rules associated with the customer record in DEAR will be used to apply to the Shipping Method you select and tax will be calculated accordingly in the Sale Invoice.

Shipping methods *i*

⊕ Shipping Method

Name	Amount	Is active
Next Day	125	☑ 🗑

Payment Methods

In this section you can create all payment methods available for customers using your B2B portal.

Click **Payment Method,** enter Name and select Method type, then mark as active.

On account and cash sales available currently.

Payment methods *i*

⊕ Payment Method

Name	Method Type	Is active
Cash	Cash On Delivery	☑ 🗑

Disconnect from store

Disconnecting from store will wipe sales history from the Log tab and any portal settings entered previously. Please consider using **Is Active** checkbox if you would like to only temporarily disable the portal.

Catalogue

In this section you can show or hide products from appearing in the customer's B2B portal view. Each portal can display a specific catalogue of products, for example, if you maintain multiple brands, you may consider publishing products from a specific brand to a particular B2B portal associated with this brand.

Please ensure to select correct portal before making any changes to the catalogue listings.

Manage portal	ecommerce	**Save Changes**

Use one of the available options Category, Family, Product Tag or Brand to filter products you would like to list/delist and then use List or Delist to publish or remove the product. If no selection is made or a search for product is performed, all products will be listed/delisted.

Category	List of all categories	Family	List all families
Product Tag	List of all tags	Brand	List of all brands

⟳ Refresh   ⊕ List   ⊖ Delist   fair

SKU	Product	Category	Price	Available Quantity	Status
101 - Gloves - 017	Fairtex Gloves Black 12 Oz Black 12 Oz	Other	95.00	0	Not listed
101 - Gloves - 016	Fairtex Gloves Black 12 Oz Black 14 Oz	Other	95.00	0	Not listed
101 - Gloves - 015	Fairtex Gloves Black 12 Oz Black 16 Oz	Other	95.00	0	Not listed
101 - Gloves - 011	Fairtex Gloves Black 12 Oz Blue 12 Oz	Other	95.00	0	Not listed
101 - Gloves - 010	Fairtex Gloves Black 12 Oz Blue 14 Oz	Other	95.00	0	Not listed
101 - Gloves - 009	Fairtex Gloves Black 12 Oz Blue 16 Oz	Other	95.00	0	Not listed
101 - Gloves - 014	Fairtex Gloves Black 12 Oz Red 12 Oz	Other	95.00	0	Not listed
101 - Gloves - 013	Fairtex Gloves Black 12 Oz Red 14 Oz	Other	95.00	0	Not listed
101 - Gloves - 012	Fairtex Gloves Black 12 Oz Red 16 Oz	Other	95.00	0	Not listed
TShirt - 1	Fairtex Tshirt	Other	49.00	0	Not listed
Fairtex Bag - 4004	Filled Bags	Other	550.00	0	Not listed
Shorts Fairtex - 01	Shorts Fairtex	Other	45.00	0	Not listed

Logo and Page Elements

In this section you can begin customising the appearance of your B2B portal, you can start by uploading your company logo. Click **Browse** and upload a file. Recommended size of logo is 200 x 100 pixels.

Logo

| Logo | | Browse... | *i* |

Page Elements

This section contains a set of page elements which can be used to customise the appearance of your portal.

Page Elements   Carousel Images

⊕ Section   *i*   ⊕ Link

	Visible	**Image**	**Filtered by**	**Item**
Carousel	☑ 🗑	Empty		
Menus & Catalog	🗑			
Group of Banners	☑ 🗑			
Tabbed Pane	☑ 🗑			

Click **Section** and add a Name, select Section Type and tick whether you would like the section to be visible by your customers.

⊕   SPECIFY THE BASIC SETTINGS FOR THE NEW SECTION   ⊗

Name   New Section

Section Type   choose...

Visible   ☐

⊕ Add   Cancel

There are four types of page elements available for selection.

Carousel

Slideshow of images appearing in a sequence. Recommended image size 930x300px.
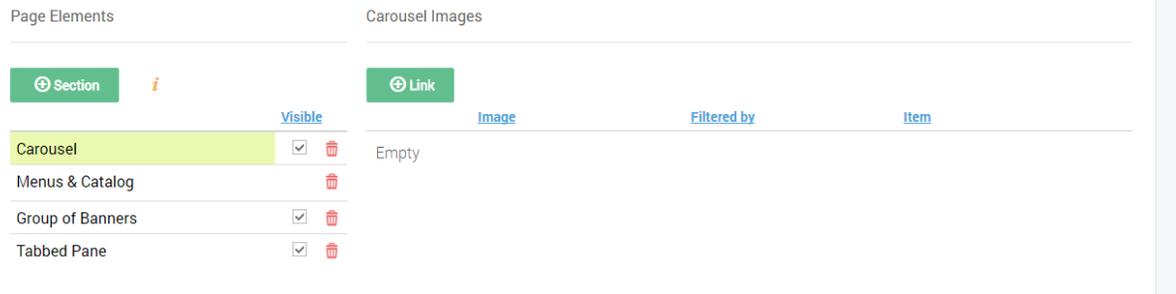
Once you have selected Carousel element you will then need to click **Link** and then **Select file** to upload an image. The next step is to link the image to product/s appearing in your portal. Use **Filtered by** drop down to filter products based on Brand, Category, Product (select specific product), Tag or enter URL. Repeat this process for every image you would like to add to carousel.

Group of banners

Group of banners is essentially a group of images which will appear next to one another on the portal.
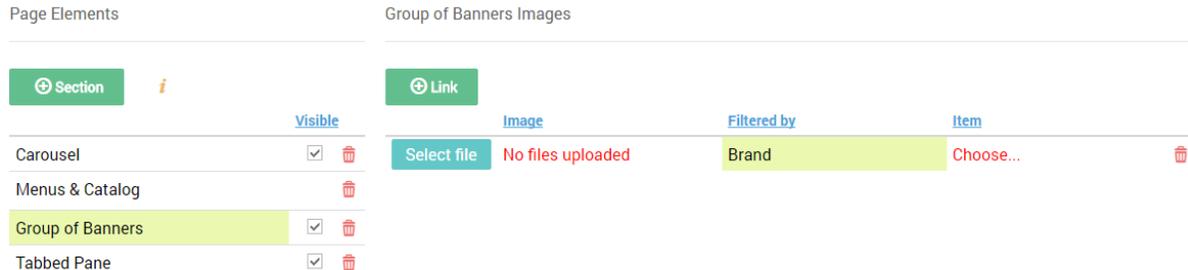
Click **Link** to select and upload an image and then link the image to product/s appearing in your portal. Use **Filtered by** to filter products based on Brand, Category, Product (select specific product), Tag or enter URL.

Tabbed Pane

Tabbed Pane element creates horizontal tabs which can be linked to product Tags.

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Once you have selected Tabbed Pane element click **Tag** and enter Title and start typing the tag you wish to associate with the new tab.

Menus and Catalogue
Element refers to the Horizontal and Vertical navigation bars which can be managed via Setup tab.

Content Pages
In this section you can manage various information pages you would like to include in the footer of your B2B portal. The portal footer can include info such as Terms and Conditions, About Us, FAQs etc

Click **Page**, enter new Page Title and begin creating/formatting the text, table or image content you would like to make visible to your customers.

Sales
The Sales tab is a log of all Sales created by customers via the portal. The list of sales can be filtered based on status of the order which you can select from the **Show** drop down. Alternatively you can also search for an order by typing in the search box.

Date	Customer	Sale Order	Amount	Order Status	Payment Status
2016/10/10	Alexei Piltiaev	SO-00177	0.00	QUOTE COMPLETED	

Appearance

In this section you can further customise the appearance of your portal by changing the colour schemes of the Header, Content and Footer areas.

Invite your customers

To invite your customers to use the B2B portal you will need to navigate to **Sale>View All Customers** and select a customer. You will need to ensure that the customer record contains a Contact with a valid email address and in **Invitations** tab use the invite button (envelope) to send an email invitation to your customer.