

Sitewards B2B Professional Manual

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1. Features



The Sitewards B2B Professional extension provides the basis for the setup of a B2B shop with Magento.

The Sitewards B2B Professional Extension provides following features:

- 1.1. login after manual activation by an administrator,
- 1.2. all product prices are only visible after login,
- 1.3. products can only be purchased after login,
- 1.4. compatible from Magento 1.4,
- 1.5. multi store compatible, the Sitewards B2B Professional can be configured for each store separately, this way B2B and B2C stores are simultaneously possible,
- 1.6. custom text instead of price,
- 1.7. multi language support, English and German installed, extendible to other languages,
- 1.8. optional activation by category or customer group,
- 1.9. optional require login to access store.

2. Requirements

2.1. Hardware

The same requirements as for Magento apply.

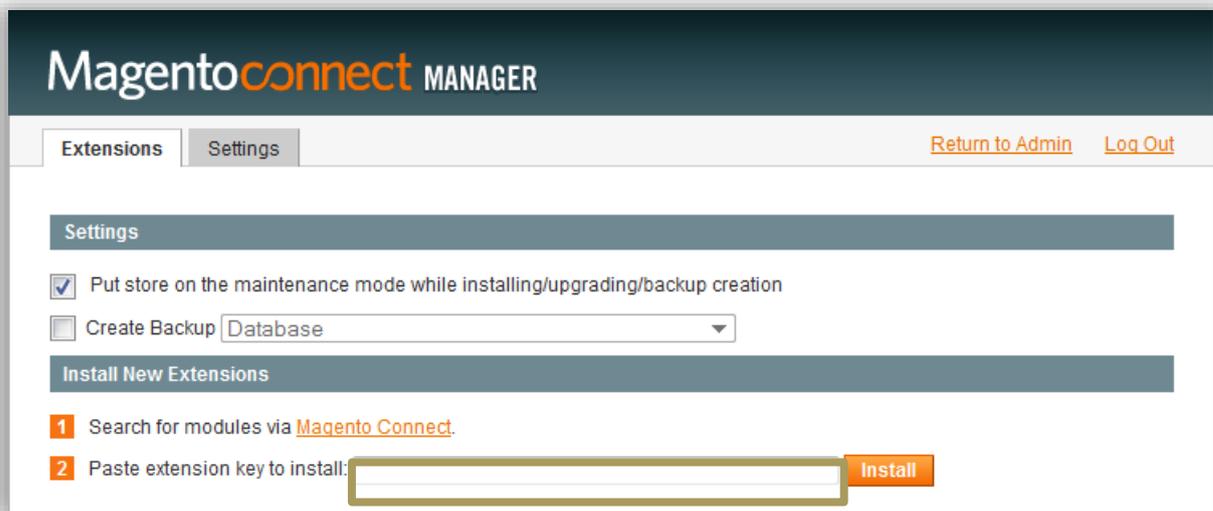
2.2. Software

Magento 1.4.0.1 or higher.

Extension "Netzarbeiter_CustomerActivation" Version 0.2.7 or higher (free extension).

3. Installation

Sitewards B2B Professional can be downloaded with Magento Connect. In the backend of your site go to System → Magento Connect → Magento Connect Manager. Now log in with an administrator account.



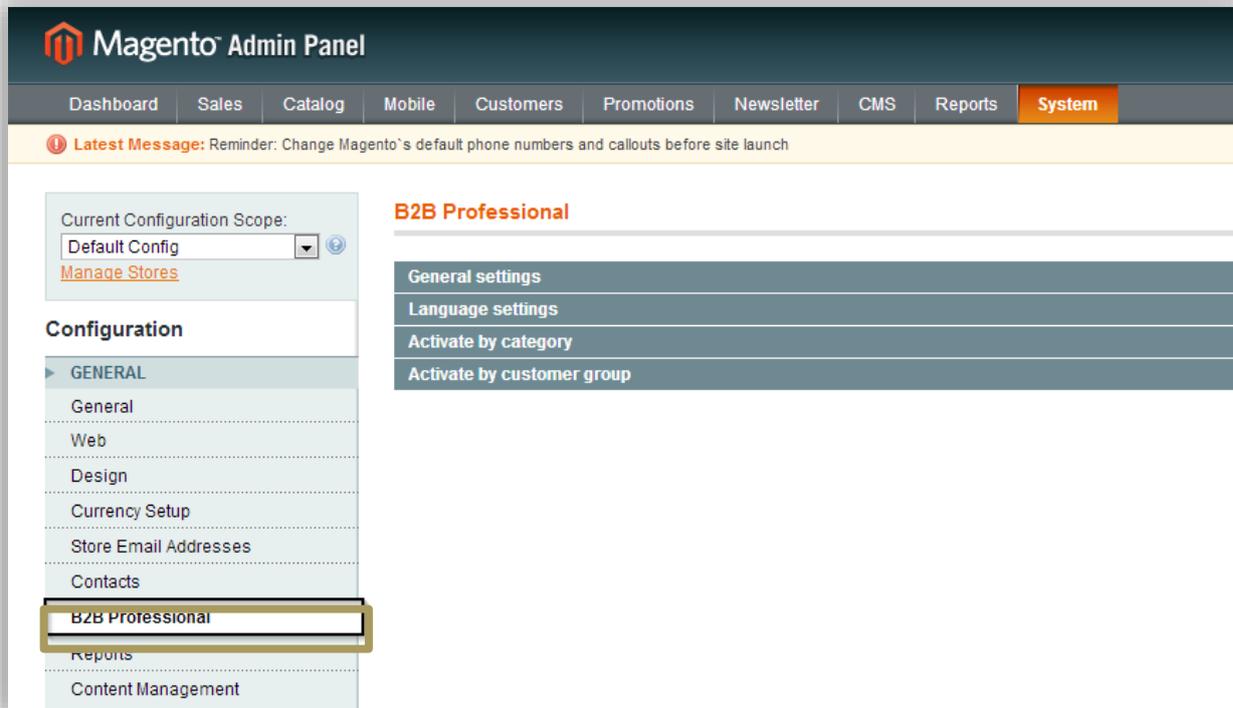
In the “Extensions” tab you find the section “Install New Extensions”. Here you can paste the B2B Sitewards Professional extension key. You can find it at:

<http://www.magentocommerce.com/magento-connect/sitewards-b2bprofessional.html>

Here select “Install Now”, choose your Magento Connect version and copy the key. Paste the key and proceed to install.

4. Configuration

The extension can be configured in the backend (System → Configuration → General → B2B Professional). Instructions can be found for each setting in the backend. If a 404 page appears please log out and log in again, so that the new permissions can be applied which are only loaded with a login.



5. Settings

Sitewards B2B Professional can only be configured in the admin section. Following settings are customizable.

5.1. General Settings

5.1.1. Enable B2B extension

Here you can enable or disable the Sitewards B2B Professional extension. You can configure it for each store individually.

5.1.2. Global customer activation

Additionally the option “Global customer activation” allows you to activate user accounts for all stores or only for the ones the user registered the account for.

5.1.3. Require User Login

The setting “Require User Login” allows you to block unregistered users from viewing the store. This does not apply to CMS pages. You can edit the error message the user receives in the language settings under “Require User Login – Message”.

5.1.4. Redirect User To Page

“Redirect User To Page” allows you to choose the page the user is redirected to when they try to access a restricted page.

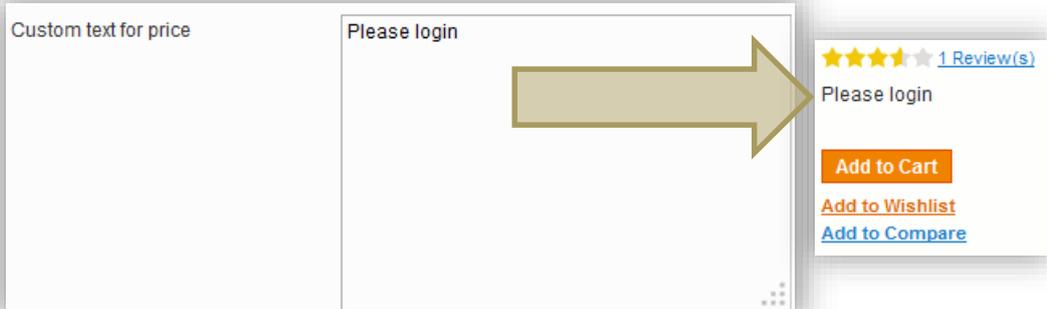
5.2. Language settings

Here you can configure which texts will be displayed in the frontend.

5.2.1. Override language file

Set the option “Override language file” to “Yes” to customize the output, else the texts will be taken from the extension’s language file, which can be modified manually. It can be found in your Magento installation under “app/locale/[language]/Sitewards_B2BProfessional.csv”

5.2.2. Custom text for price



“Custom text for price” will be displayed instead of the price on product pages and product detail pages.

5.2.3. Custom text for checkout-error

“Custom text for checkout-error” will be displayed if someone tried to check out with a product which they have no access to.

! Your account is not allowed to access this store.

NEW CUSTOMERS

By creating an account with our store, you will be able to move through the checkout process faster, store multiple shipping addresses, view and track your orders in your account and more.

REGISTERED CUSTOMERS

If you have an account with us, please log in.

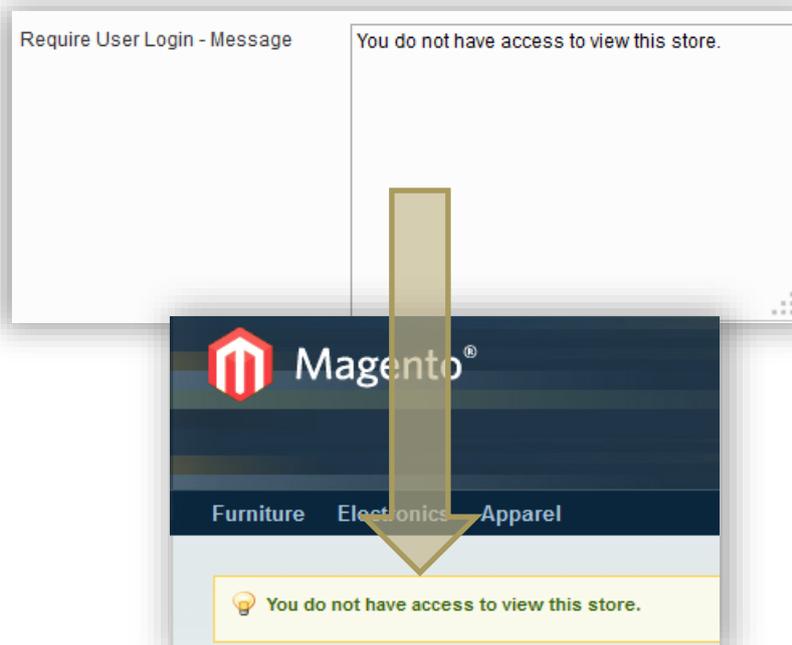
Email Address *

Password *

* Required Fields

[Create an Account](#) [Forgot Your Password?](#) [Login](#)

5.2.4.

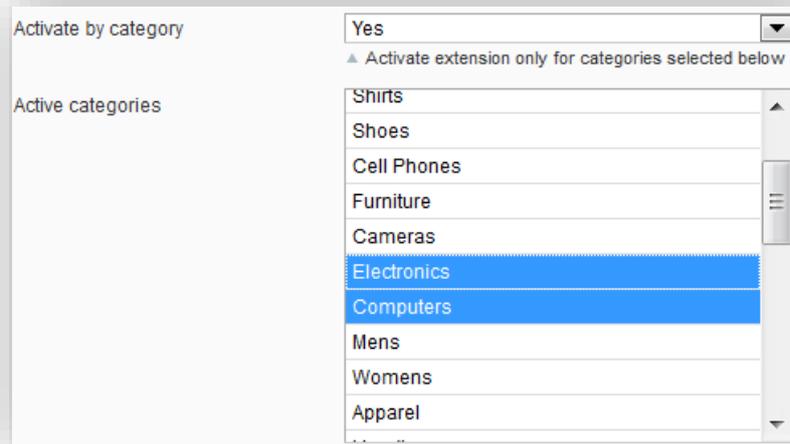


In “Require User Login – Message” you can edit what message the unregistered user is shown when the user tries to access the shop. The global setting “Require user login” should be active before.

5.3. *Activate by category*

Here you can configure if the Sitewards B2B Professional extension should only be applied on certain product categories.

5.3.1.



The screenshot shows a configuration window for the Sitewards B2B Professional extension. The 'Activate by category' dropdown is set to 'Yes'. Below it, a list of categories is shown, with 'Electronics' and 'Computers' selected. The list includes: Shirts, Shoes, Cell Phones, Furniture, Cameras, Electronics, Computers, Mens, Womens, and Apparel.

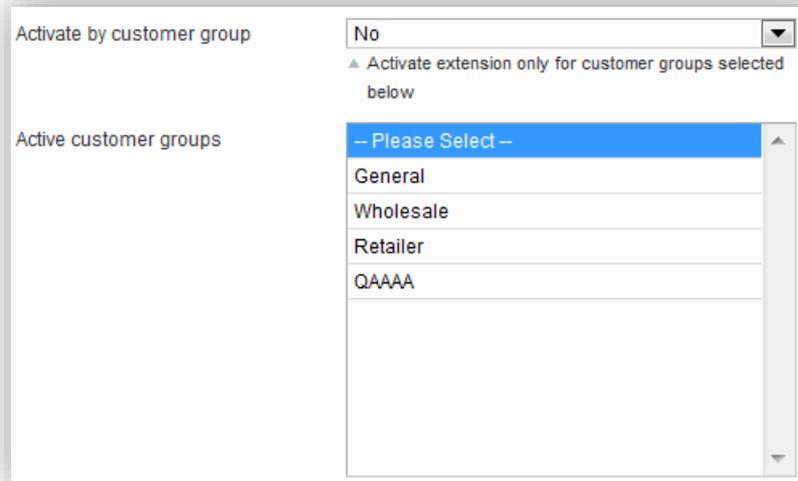
You can this filter on by choosing “Yes” at “Active by category”. Under “Active categories” you can select which categories the extension should be applied on. Please select at least one category. If you select a main category the extension will also be used on the subcategories.

Assigning a product to multiple categories with different Sitewards B2B Professional settings should be avoided. If a product is assigned to a category with active Sitewards B2B Professional settings, only eligible users will be able to add the product to the cart, despite it being assigned to other categories which are not blocked by the extension.

5.4. *Activate by customer group*

Here you can configure which customer groups the Sitewards B2B Professional extension should be applied on. The selected customers will not be able to see the prices of the products (applies to all categories). They will have access to their user accounts and will be able to register for the newsletter.

5.4.1.



The screenshot shows a configuration window with two main sections. The top section, 'Activate by customer group', contains a dropdown menu currently set to 'No'. Below this dropdown is a small triangle icon followed by the text 'Activate extension only for customer groups selected below'. The bottom section, 'Active customer groups', contains a list box with a scroll bar. The list box is currently empty, showing only the placeholder text '-- Please Select --'. The list items visible are 'General', 'Wholesale', 'Retailer', and 'QAAAA'.

Please keep in mind that Sitewards B2B Professional will be active if either of the conditions “Activate by customer group” or “Activate by category” or both do apply. When activating the extension by “customer group” the guest user group can’t see prices either. This is set automatically.

5.5. *Cart Sidebar Totals*

Here you can configure the replacement of the cart sidebar totals. This section allows you to define what type of html tag the totals are wrapped in and how we can identify this specific tag. You can also define if you will replace the content or remove this section completely. This section can be useful if you have multiple stores with different access levels, it will stop users adding a product on one store and switching to another and seeing information they are not allowed to see.

Cart Sidebar Totals		
Replace the sidebar totals	<input type="text" value="Yes"/>	[STORE VIEW]
What tag wraps the sidebar totals?	<input type="text" value="<p>"/>	[STORE VIEW]
What identifier does this tag have?	<input type="text" value="class"/>	[STORE VIEW]
What value does this identifier have?	<input type="text" value="subtotal"/>	[STORE VIEW]
Do you want to remove this section completely?	<input type="text" value="No"/>	[STORE VIEW]

5.5.1. *Replace the sidebar totals*

Set the option “Replace the sidebar totals” to “Yes” to replace/remove the totals section of the cart side bar.

5.5.2. *What tag wraps the sidebar totals?*

Specify what html tag wraps the used design’s sidebar totals. Allowed options (a, div, p, span, button)

5.5.3. *What identifier does this tag have?*

Specify what attribute is unique to this tag. Allowed options (id, class, onclick)

5.5.4. *What value does this identifier have?*

Specify the unique part of the identifier for this tag. We do a partial match on this so if you tag has multiple values you need only provide us with the unique part.

5.5.5. *Do you want to remove this section completely?*

Specify if you will remove the section contained in the tag defined above or to replace the section with the default “Custom text for price” as defined under the language settings.

5.6. *Cart Sidebar Actions*

Here you can configure the replacement of the cart sidebar actions. This section allows you to define what type of html tag the actions are wrapped in and how we can identify this specific tag. You can also define if you will replace the content or remove this section completely. This section can be useful if you have multiple stores with different access levels, it will stop users adding a product on one store and switching to another and seeing information they are not allowed to see.

Cart Sidebar Actions		
Replace the sidebar actions section	<input type="text" value="Yes"/>	[STORE VIEW]
What tag wraps the sidebar actions?	<input type="text" value="<div>"/>	[STORE VIEW]
What identifier does this tag have?	<input type="text" value="class"/>	[STORE VIEW]
What value does this identifier have?	<input type="text" value="actions"/>	[STORE VIEW]
Do you want to remove this section completely?	<input type="text" value="Yes"/>	[STORE VIEW]

5.6.1. *Replace the sidebar actions*

Set the option “Replace the sidebar actions” to “Yes” to replace/remove the actions section of the cart side bar.

5.6.2. *What tag wraps the sidebar actions?*

Specify what html tag wraps the used design’s sidebar totals. Allowed options (a, div, p, span, button)

5.6.3. *What identifier does this tag have?*

Specify what attribute is unique to this tag. Allowed options (id, class, onclick)

5.6.4. *What value does this identifier have?*

Specify the unique part of the identifier for this tag. We do a partial match on this so if you tag has multiple values you need only provide us with the unique part.

5.6.5. *Do you want to remove this section completely?*

Specify if you will remove the section contained in the tag defined above or to replace the section with the default “Custom text for price” as defined under the language settings.

5.7. Cart Items Price

Here you can configure the replacement of the cart items price display. This section allows you to define what type of html tag the prices are wrapped in and how we can identify this specific tag. You can also define if you will replace the content or remove this section completely. This section can be useful if you have multiple stores with different access levels, it will stop users adding a product on one store and switching to another and seeing information they are not allowed to see.

Cart Items Price		
Replace the cart item prices	<input type="text" value="Yes"/>	[STORE VIEW]
What tag wraps the cart item prices?	<input type="text" value=""/>	[STORE VIEW]
What identifier does this tag have?	<input type="text" value="class"/>	[STORE VIEW]
What value does this identifier have?	<input type="text" value="price"/>	[STORE VIEW]
Do you want to remove this section completely?	<input type="text" value="No"/>	[STORE VIEW]

5.7.1. Replace the cart item prices

Set the option “Replace the cart item prices” to “Yes” to replace/remove the price section of the cart items.

5.7.2. What tag wraps the cart item prices?

Specify what html tag wraps the used design’s cart item prices. Allowed options (a, div, p, span, button)

5.7.3. What identifier does this tag have?

Specify what attribute is unique to this tag. Allowed options (id, class, onclick)

5.7.4. What value does this identifier have?

Specify the unique part of the identifier for this tag. We do a partial match on this so if you tag has multiple values you need only provide us with the unique part.

5.7.5. Do you want to remove this section completely?

Specify if you will remove the section contained in the tag defined above or to replace the section with the default “Custom text for price” as defined under the language settings.

5.8. Add to cart button

Here you can configure the replacement of the “add to cart” buttons across the site. This section allows you to define what type of html tag the prices are wrapped in and how we can identify this specific tag. You can also define if you will replace the content or remove this section completely.

Add to cart button		
Replace the add to cart button	<input type="text" value="Yes"/>	[STORE VIEW]
What tag wraps the add to cart button?	<input type="text" value="<button>"/>	[STORE VIEW]
What identifier does this tag have?	<input type="text" value="onclick"/>	[STORE VIEW]
What value does this identifier have?	<input type="text" value="remove-add-to-cart"/>	[STORE VIEW]
Do you want to remove this section completely?	<input type="text" value="Yes"/>	[STORE VIEW]

5.8.1. Replace the add to cart button

Set the option “Replace the add to cart button” to “Yes” to replace/remove the price section of the cart items.

5.8.2. What tag wraps the add to cart button?

Specify what html tag wraps the used design’s “add to cart” buttons. Allowed options (a, div, p, span, button)

5.8.3. What identifier does this tag have?

Specify what attribute is unique to this tag. Allowed options (id, class, onclick)

5.8.4. What value does this identifier have?

Specify the unique part of the identifier for this tag. We do a partial match on this so if you tag has multiple values you need only provide us with the unique part.

5.8.5. Do you want to remove this section completely?

Specify if you will remove the section contained in the tag defined above or to replace the section with the default “Custom text for price” as defined under the language settings.

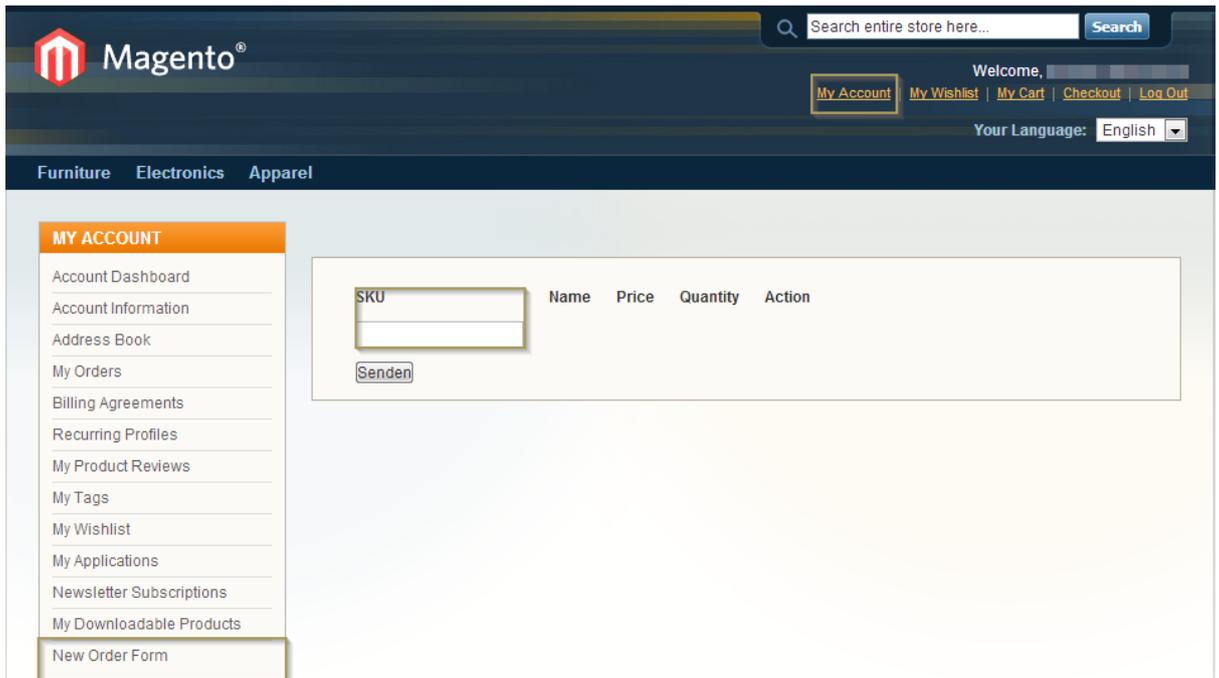
6. New Features

6.1. Order Form

The customer is now able to access an order form in the customer menu. With this form and the SKU a customer can directly order a product. The SKU can be edited in the backend under “Catalog” → “Manage Products”

6.1.1 Order Form Manual

In the frontend you can find the “new order form” in the customer menu. Here you can order a product with its “SKU”. You will find the SKU attribute in the Backend under the same name. After entering the “SKU” use the tab-key. Now you can select the amount you want to order. When you are done with the order you can click the “senden” button or press the enter-key. This will send the items to your cart.



6.2. Order Date

In the checkout process the customer can now choose the order date. It is possible to choose any date, this means the order date can be in the past.

Order Date: 2013-08-18

?		August, 2013						x	
«		Today		»		»			
wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat		
30					1	2	3		
31	4	5	6	7	8	9	10		
32	11	12	13	14	15	16	17		
33	18	19	20	21	22	23	24		
34	25	26	27	28	29	30	31		

Select date

* Required Fields

Continue

The Shop owner has the possibility to check this date in the Backend in the Orders detail page.

Additional

Defined 2013-08-18
order date