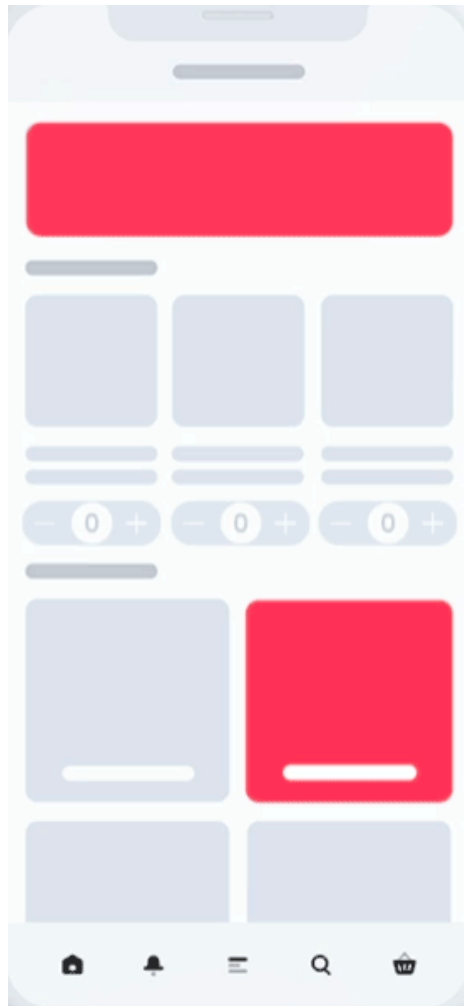


# b2b.store

## May 2021.05 Release Notes



Hello b2b.store customers,

We've got some great, new, customer requested features in the app this month, and the b2b.store Admin Panel continues with its regular improvements...

**NEW** - Popular Products Carousel

**Updated** - b2b.store Admin Panel - Importers & Settings enhancements

**NEW** - Multiple Mandatory Customer Order Notes

**Plus** - Other Enhancements & Fixes

**NEW** - Customer Financial Account Info

# b2b.store App: New Features, Enhancements & Fixes

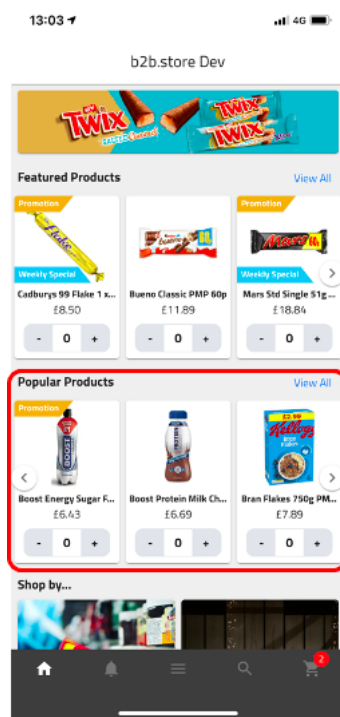
Version: 2021.05



## New Feature: Popular Products Carousel

Revenue generating Machine Learning (ML) in action!

There's a new carousel in town (OK, on the Home screen), that's automatically generated with **Popular Products** that customers on your b2b.store are purchasing.



Once enabled, the **Popular Products** carousel just appears automatically, *under* the **Featured Products** carousel.

No configuration is required in BEAM.

The most popular 20 products will appear.

The first 3 products will be shown on the carousel by default.

Customers can click/tap the right arrow to see more or simply click/tap **View All** to see them all.

**NOTE:** If your b2b.store is new when this feature is enabled, the **Popular Products** carousel won't appear until there are *at least* 3 products to display.

### How can I get my b2b.store to display the Popular Products carousel?

Look out for this feature to automatically appear in your b2b.store in the coming days. If it does not automatically appear in the coming days, just email [carlin.easton@b2b.store](mailto:carlin.easton@b2b.store) and ask for it to be enabled.



## New Feature: Multiple Mandatory Customer Order Notes

Another common feature request has arrived!

Your b2b.store can now ask your customers for multiple **mandatory** customer order notes that you require to efficiently fulfil their order.

This could be anything you like, such as:

- a delivery address
- delivery instructions ("ring this number upon arrival to be let into the delivery area")
- what time they would like to collect
- what time they would like a delivery
- exact requirements of weighted products or open code products ("3.5kg of cheese, not 4kg please")
- specify product requirements ("bread thick sliced, pre-cut rolls please")
- anything else you could do with knowing to fulfill your customer's order

The **title (Order Notes** in the screen shot opposite), that appears above the text area is *configurable*, so you can ask your b2b.store customers *exactly* what you want to ask them.

If you specify this text as *mandatory*:

- an asterisk (\*) appears after the title text
- the text box is outlined in red

...to indicate to your b2b.store customers they must fill this in before they can checkout.

The *grey help text* that appears within the text box is also configurable, so you can describe what sort of text you are expecting to be typed here.

**Multiples:** You can configure as many **Customer Notes** in your b2b.store as you like (*mandatory or not*, you decide). They will all just appear on your **Order Summary** screen.

All Customer **Order Notes** will appear:

1. on the **Customer's Order Email** they receive
2. on your Customer Order Email **copy** you receive into your business
3. in the **Order CSV** file
4. can be called via the b2b.store **Orders API**

## How can I get my b2b.store to display Mandatory Customer Order Notes?

Customer Order Notes are managed via the **Settings** menu > **STORE CUSTOMISATIONS** tab of your b2b.store Admin Panel.

Just look for the **Checkout Fields** section (top right) and start adding your Customer Order Notes, then configure the **Label, Placeholder** (grey help text) and specify if it should be **Mandatory**.

The screenshot shows the b2b.store Admin Panel interface. The top navigation bar includes 'Settings', the 'b2b.store' logo, and a refresh button. The left sidebar lists menu items: Orders, Customers, Customer Prices, Products, Categories, and Settings. The main content area is titled 'STORE CUSTOMISATIONS' and contains sections for 'Pricing' and 'Promoted Product Labels'. The 'Checkout Fields' section is highlighted with a red border and contains a table with one field:

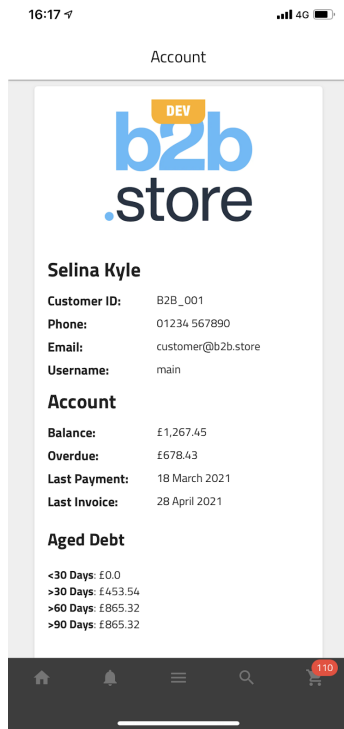
Key *	Label *	REMOVE
1 orderNotes	Order Notes	⊖

Below the table, there is a 'Placeholder' field with the text 'Write any notes here' and a 'Mandatory' toggle switch that is currently turned on. An 'ADD' button is located below the table, with a tooltip that reads: 'Add additional fields to the checkout screen to capture specific data to your needs. The order of the fields on the checkout screen will be determined by the order you have entered them above.'



## New Feature: Customer Financial Account Information

Your b2b.store customers can now easily view their financial account information.



If available, customers can view the following general information about their account:

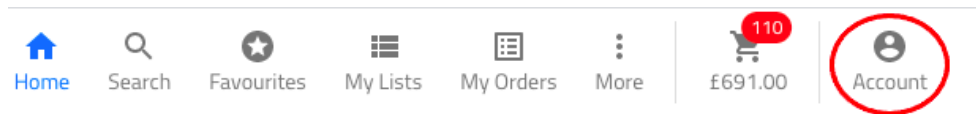
- **First Name Last Name**
- **Customer ID**
- **Phone**
- **Email**
- **Username**

If available, the following financial **Account** information will also be displayed:

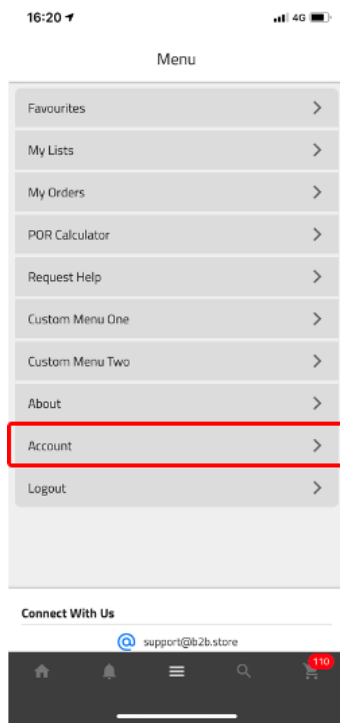
- **Balance**
- **Overdue**
- **Last Payment**
- **Last Invoice**

If available, *further information* can also be displayed (e.g. Aged Debt).

This *further information* also supports markdown and/or HTML so you can format this as required (e.g. bold, italics, underline, colours, titles).



On desktops/laptops/tablets (in landscape mode) the new **Account** icon appears in the top right.



On phones and tablets (in portrait mode) the **Account** option appears off the **Menu** icon.

### How can I get my b2b.store to display the Account Information?

Customer Financial Account information is displayed in b2b.store via an **Accounts CSV** file.

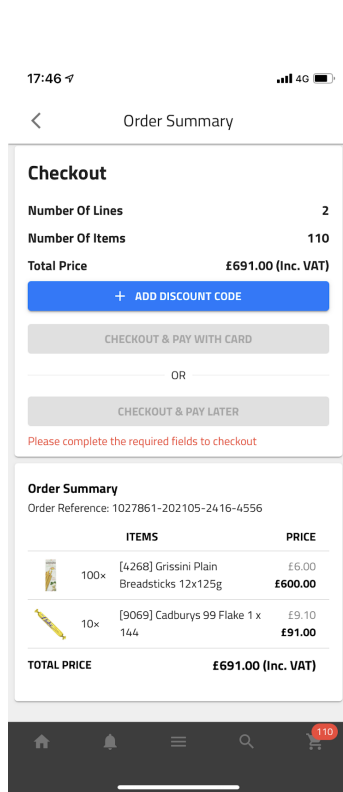
#### **NOTES:**

1. The **Accounts CSV** file can only be imported into b2b.store using the **FTPS** integration method.
2. You *cannot* currently import the **Accounts CSV** using the b2b.store Admin Panel.

See [b2b.store Data Requirements \(CSV File Formats\)](#) for more information.

## b2b.store: Enhancements & Fixes

- **Order Summary** - On the **Order Summary** screen, the **Checkout** section now includes:



- **Number Of Lines**
- **Number Of Items**
- **Total Price (Exc. or Inc. VAT)**

...right next to the **Checkout** buttons, so customers are fully aware of all this information before they checkout.

- **Top of screens** - When navigating to new screens, sometimes you would be scrolled down slightly. This has been fixed, so, well, you're now at the top of new screens.

# b2b.store Admin Panel: New Features, Enhancements & Fixes

Version: 2021.05

## Admin Panel - Settings

Due to the Admin Panel's ever increasing functionality, the **Settings** screen has been split into *four* tabs, to make things clearer and easier to navigate:

### Company

- Branding
- Contact Info
- Social Links
- Legal - **NEW**

### Store Customisations

- Pricing
- Promoted Product Labels
- About Page - **NEW**
- Checkout Notice - **NEW**
- Checkout Fields - **NEW**
- Menu Links
- Stock Indicators - **NEW**

### Fulfilment

- Fulfilment
- Fulfilment Offsets - **NEW**

### Integrations

- Integrations
- Scheduled Notifications

## Admin Panel - Importers

- Single empty rows are now *ignored* by the importer. Previously, if the importer came across a single empty row, the CSV file would not be imported.
- Improved *error reporting* if there is an issue with any CSV file.

### How can I view, set and change these settings in my b2b.store:

Just go to your b2b.store's **Admin Panel** (e.g. <https://your.b2b.store/admin>) and click **Settings**!

**NOTE:** To access your **Admin Panel** you will need your *Admin Panel Password (API Key)*. You will have been sent this previously.

If you can't find your *Admin Panel Password (API Key)*, just email [carlin.easton@b2b.store](mailto:carlin.easton@b2b.store) and ask for it.



## Feedback

We hope you enjoy getting familiar with these new features and enhancements but if you have any feedback or questions at all, or you would like to request a feature, please email: [carlin.easton@b2b.store](mailto:carlin.easton@b2b.store)

See you next month!

