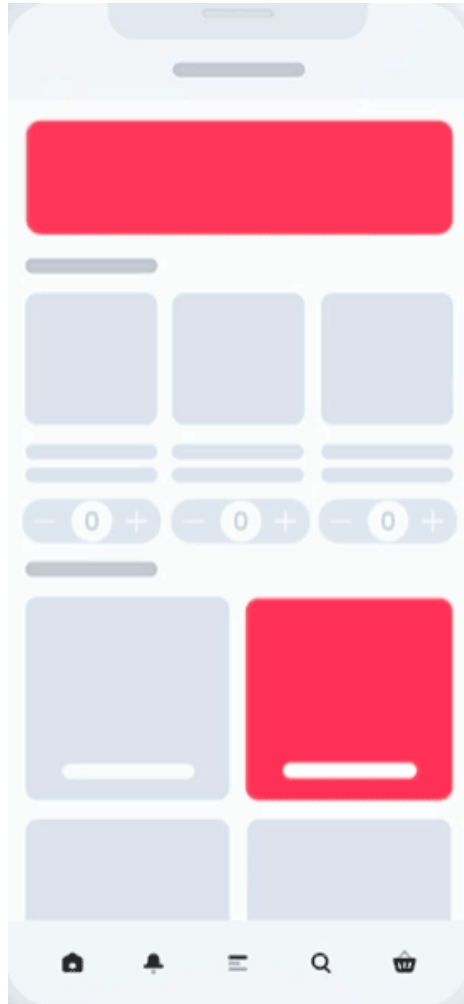


# b2b.store

## August 2021.08 Release Notes



Hello b2b.store customers,

Here we are with b2b.store's August Release! Another focus this month on the Admin Panel (security & integrity), and a tantalising new **BETA** feature for your Sales staff...

**NEW** - Admin Panel - Username/Password Logins

**NEW** - Business Intelligence (BI) Reports

**NEW** - Admin Panel - Place orders on behalf of customers **BETA**

**Plus** - Enhancements & Fixes

# b2b.store New Features

Version: 2021.08



## New Feature: Admin Panel - Username & Password Logins

To ensure the security and integrity of your b2b.store, the way you login to your Admin Panel is changing.

From the August 2021.08 Release, **Username** logins will be required to login to your b2b.store Admin Panel.

We are moving away from the current API Key/Password login method to a more traditional Username / Password requirement.

You will be emailed your Username and temporary password if you don't already have it.

### NOTES:

- **Forgotten Password:** If you have forgotten your password, simply click/tap the **Forgotten Password** option on the Admin Panel login screen. **Please note that we will not be able to help you with resetting your password or emailing it to you.** We do not have access to this information, please use the **Forgotten Password** option and follow the instructions.
- **b2b.store App & Admin Panel Logins are separate:** Your Admin Panel login is currently **separate** to your b2b.store app login. So you **cannot** log into your b2b.store with your Admin Panel account and vice versa.
- **Admin Panel sessions last for 30 days:** If you don't visit your Admin Panel for 30 days you will need to re-login. This is by design and is to protect the security and integrity of your b2b.store.
- Your new Admin Panel account will **not** show in the Customers list of your Admin Panel.
- This change does **not** affect how your customers login to your b2b.store, and it does not affect the Order API access or FTPS access.
- Your b2b.store can have up to **two** Admin Panel logins for free.
  - If your business requires more than two Admin Panel logins, please email [adam.brown@b2b.store](mailto:adam.brown@b2b.store) to discuss your requirements further.

If you have any questions at all about this more secure way to access your b2b.store's Admin Panel, please email [carlin.easton@b2b.store](mailto:carlin.easton@b2b.store)



## New Feature: Admin Panel - BDM / Sales / Telesales Feature (Place orders on behalf of customers)

We're really excited to **BETA** release a brand new feature to b2b.store!

Do you have BDMs (Business Development Managers) or Sales staff out on the real or virtual road, or Telesales staff taking orders over the phone?

If so, this feature is for them, and we really think it's going to super charge sales from your b2b.store.

Just look at what your Sales staff can now do in your b2b.store:

- Place orders on **behalf** of customers.
- Negotiate and **change** prices for individual products, and add line **notes** to those individual products.
- View **previous** orders your customers have made, as well as the previous orders they have made on their customers' behalf.

Once these orders have been placed on behalf of customers, they also appear in the customers' own **Order History** in their b2b.store app. Don't worry, if a customer copies that order, the product prices will reflect the current price, **not** the special negotiated price!

**NOTE:** As this is a **BETA** feature, we are looking for feedback on how it works for you and your Sales staff, what you/they like, what could be improved etc.

So if you're **interested in trying this exciting new feature out**, please email [adam.brown@b2b.store](mailto:adam.brown@b2b.store) to discuss your requirements further.

*See the following screenshots for a flavour of what your Sales staff can now do...*



## New Feature: Admin Panel - BDM / Sales / Telesales Feature (Place orders on behalf of customers)

The screenshot shows the Admin Panel interface for 'b2b.store'. The left sidebar menu is reduced, with 'Baskets' highlighted in red and marked 'BETA'. A red arrow points to the 'Baskets' menu item. The main content area displays a table of baskets with columns: Created, Customer, Basket Name, Notes, Lines, Items, and Total Price.

Created	Customer	Basket Name	Notes	Lines	Items	Total Price
17/08/2021, 11:27	BDMCustomer1FirstName BDMCustomer1LastName	RM170821	Placed by: robsales	2	1002	£10,005.54
19/08/2021, 10:06	BDMCustomer1FirstName BDMCustomer1LastName	RM test basket	Placed by: robsales	1	1000	£900.00
18/08/2021, 15:20	BDMCustomer6FirstName BDMCustomer6LastName	CE 18082021 (Introductory Specials)	Placed by: carlinsales	2	1076	£6,778.36
16/08/2021, 17:31	BDMCustomer6FirstName BDMCustomer6LastName	CE160821(Soft Drinks)	Placed by: carlinsales	1	2	£2.00
19/08/2021, 11:16	BDMCustomer1FirstName BDMCustomer1LastName	RM 180821	Placed by: robsales	0	0	£0.00

Notice that the usual Admin Panel menu is reduced. Sales staff can **only** see:

1. the **Basket** screen to place orders on a customers' behalf.
2. the **Orders** screen that displays all *previous* orders.

...all the usual Admin Panel menu options are removed.

The screenshot shows the 'Build a basket' form in the Admin Panel. The form is titled 'Build a basket' and includes a subtitle: 'Build a basket up on behalf of one of your customers and then submit it as a new order'. There are three main sections: 'Customer' (1), 'Basket Name' (2), and 'Notes' (3). The 'Customer' section has a dropdown menu for 'Username \*'. The 'Basket Name' section has a text input field for 'Basket Name \*'. The 'Notes' section has a text area for 'Notes' with a pre-populated value 'Placed by: carlinsales'. There are 'DISCARD' and 'ADD ITEMS' buttons in the top right corner.

Sales staff can create a new basket on behalf of a customer:

1. Select/type a customer's **username**.
2. Give this **basket** a name, so you can come back to it in the future, before actually placing the order.
3. **Placed by:** will be pre-populated with the Sales person who's logged in, so you know who has placed this order on the customers behalf.



## New Feature: Admin Panel - BDM / Sales / Telesales Feature (Place orders on behalf of customers)...continued

### Add Product To Basket



#### Loads Chews +40%

12 x 135g

123480

£7.50

13 in stock

1 Product Lookup\*  
Loads Chews +40%

2 Quantity\*  
10

3 Override Product Price (£)  
6.50

4 Line Item Notes  
£1 per box off!







CANCEL

ADD

1. Add **products** to the customer's basket (type SKUs or Product Names or keywords to find products). The standard price will be displayed, along with *stock* information.
2. Change the **quantity** the customer requires.
3. **Override** the standard price.
4. Make any **notes** about this product / price / deal so the customer knows this is *their* special price, for *this* order. These product notes will appear on:
  - a. the order email the **customer** receives;
  - b. the order email **copy** you receive into your business;
  - c. the order **csv** file (linked to at the bottom of the order email you receive into your business);
  - d. the **FTPS** orders folder (if you're using this *hugely* time saving integration)

### Basket

ADD A PRODUCT

SKU	Title	Units	Quantity	Price	Total Price	Notes	Actions
 123542	7 UP Free 330ml PMP 59p or 2 for £1	24 x 330ml	15	£7.50	£112.50	£2.49 off per case (intro offer)	 
 123480	Loads Chews +40%	12 x 135g	10	£6.50	£65.00	£1 per box off!	 



## New Feature: Admin Panel - BDM / Sales / Telesales Feature (Place orders on behalf of customers)...continued

Checkout b2b.store carlinsales

Orders  
Baskets **BETA**

View Store [View Store](#)  
Support [Support](#)

Build 2021.08 (0.5.0-878107f) staging

### Checkout

Complete the checkout form to submit your order

**DISCARD** **SUBMIT**

**Fulfilment**

Click & Collect  
 Delivery

**Please select your preferred Delivery slot**

Delivery Slot \*  
Tue, Aug 31, 7:00 AM – 7:00 PM

Click & Collect slots can not be guaranteed. If the selected slot is not available then we will contact you once we receive your order to discuss your fulfilment requirements.

**Order Notes**

[Order Notes](#)  
Deliver to Side Street entrance as there are roadworks on Front Street entrance.

**Customer**

BDMCustomer6FirstName  
BDMCustomer6LastName

**Summary**

Number of Lines	2
Number of Items	25
Total Price	£174.90

Once you've added items, you can then checkout the order just as a customer would, selecting a **collection/delivery** slot (if required) and adding any general order **notes** the customer would like.

Click/tap **Submit**...and you're done!

The customer get's their order confirmation email, you get your copy, and the order itself appears in the all **Orders** list in the Admin Panel.

**NOTE:** As this is a **BETA** feature, we are looking for feedback on how it works for you and your Sales staff, what you/they like, what could be improved etc.

So if you're **interested in trying this exciting new feature out**, please email [adam.brown@b2b.store](mailto:adam.brown@b2b.store) to discuss your requirements further.



## New Feature: Business Intelligence (BI) Reports

The **Insights** **BETA** already available in your Admin Panel is only a *taster* of what's really possible.

Our **Business Intelligence (BI) Reports** (graphs, data and insights) give real analysis into your b2b.store and how it's used.

Here's just some of the **BI Reports** currently available:

- top spending customers;
- which customers have signed up;
- most common ordering times;
- what customers are searching for;

Get all these actionable insights (and more) into the who, what and when of everything that is really going on in your b2b.store.

To find out more and get access to your b2b.store's **Business Intelligence (BI) Reports**, please email [adam.brown@b2b.store](mailto:adam.brown@b2b.store)

## Enhancements & Fixes

1. **Customer Fulfilment Dates/Times in Order CSV:** To assist certain ERP systems that require customer fulfilment days/times to be in a specific format and in their own columns, b2b.store now exports this info in the Order CSV file.
2. **Blurry Logo Image in Order Emails:** Your logo that appears at the top of Customer Order Emails could sometimes appear blurry. Non-blurry logos are now displayed instead...yay!
2. **Admin Panel > Settings > CSV Importers Feedback:** We keep improving b2b.store's CSV Importer feedback, to help you if you're having any issues importing your CSV files.
3. **Admin Panel > CSV Importers & FTPS:** CSV filenames that contain *spaces* can now be imported successfully.
4. **Unified Order CSVs:** Order CSV files have all been unified. So, whether they are:
  - a. exported via your *Admin Panel*;
  - b. exported via *FTPS*;
  - c. downloaded via the link in your copy of the *Customer Order Email*;...**all** the resulting Order CSVs are now **identical**.

## 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!

