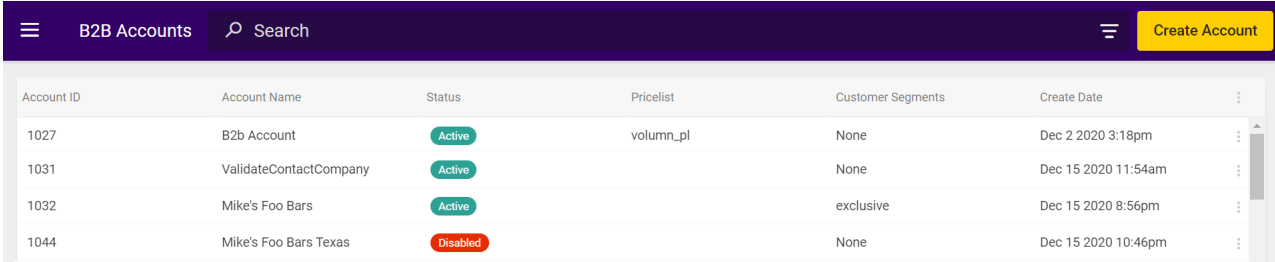


# Manage B2B Accounts

Kibo Admins can view all accounts, including pending account requests, on the B2B Accounts page of the Admin UI. Here you can manage the accounts of all companies that can buy from you.



Account ID	Account Name	Status	Pricelist	Customer Segments	Create Date
1027	B2b Account	Active	volumn_pl	None	Dec 2 2020 3:18pm
1031	ValidateContactCompany	Active		None	Dec 15 2020 11:54am
1032	Mike's Foo Bars	Active		exclusive	Dec 15 2020 8:56pm
1044	Mike's Foo Bars Texas	Disabled		None	Dec 15 2020 10:46pm

## Create an Account

New accounts are created with some initial configurations. To begin creating one:

1. Go to **Main > B2B > B2B Accounts**.
2. Click **Create Account** in the top right.
3. This will open the initial account configurations, separated into sections for Company and Admin User Information.
4. In the **Company Information**:
  - Enter the **Account Name**.
  - Select the **Site** catalog that this account should use.
  - Toggle **Tax Exempt** on if appropriate.
  - Select a **PriceList** if you want the account to use that specific price list rather than resolving to a price list via segment.
  - Select any **Segments** that are applicable to the account.

### Company Information

Account Name \*  Site \*

Tax Exempt

Tax ID <sup>id</sup>

PriceList

B2B Segments Search

5. In the **Admin User Information**:

- Enter a **First Name**, **Last Name**, and **Email**. This user will be set as the account administrator by default, and will receive an email with a link to set their account password once the account is activated. The maximum allowed length of email addresses is 254 characters.

### Admin User Information

First Name \*

Last Name \*

Email \*

6. Click **Save** in the top right of the page to create the initial account. To continue configuring the account with further settings, you can edit it as detailed in the following section.



Additionally, creating an account with this form will not immediately activate the account. Instead, the account will be created in a Pending Approval status and will require a sales representative to be assigned upon approval. See the [Account Status section](#) for more information.

## View and Edit Existing Accounts

To view and edit an account, either click its entry in the B2B Accounts table or click **Edit** from the drop-down menu on the far right. This will open a details page with the full account settings.

The screenshot shows the 'B2B Accounts' details page for an account named 'B2b Account'. The top header includes a navigation menu with 'B2B Accounts' and an 'Active' status indicator, along with 'Cancel' and 'Save' buttons. The main content area is divided into several sections:

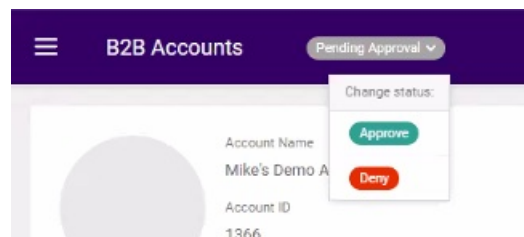
- Account Information:** Account Name (B2b Account), Account ID (1027), Customer Set (default), and Available Balance (\$999,177.95).
- Address:** No address.
- Account Status:** Active (indicated by a green 'Active' button), Purchaser Orders (Enabled, indicated by a green 'Enabled' button), and Customer Since (Dec 2, 2020).
- Lifetime Value:** \$335.36.
- Summary Table:** A table with columns for Avg. Order Size (\$83.84), Total Visits (250), and Fulfilled Orders (4).
- Navigation Tabs:** General, Quotes, Users, Sales Reps, Addresses, Payment Information, Order History, Audit Log, Lists, and Account Attributes.
- General Section:** Account Name (B2b Account), Tax Exempt (checkbox), Tax ID # (input field), B2B Segments Search (input field with Search button), and PriceList (volum\_pl dropdown menu).

## Account Status

The account's current status is displayed in the top header. If a new account is currently Pending

Approval, then it can be confirmed or rejected in the top left by expanding the drop-down menu and clicking **Approve** or **Deny**. If the account is already approved, you can deactivate it by expanding the drop-down again and switching the status to inactive.

When approving a pending account, you will be required to assign a sales representative to it. See the [Types of B2B Users guide](#) for more information about the Users and Sales Reps sections of account details and how to manage them.



## General Information

This is the basic information that was set when creating an account, including the name, tax status, account priority (used for [order release](#)), and any segments or price lists.

Additional general information is also displayed at the top of the account details page, above the configuration tabs: the lifetime value, the date it was created, the current purchase order amount, and more.

## Quotes

This section is a log of the quotes that have been created for the B2B account. A seller can click **Initiate Quote** to be directed to the storefront and begin creating a new quote for the B2B account. The full history of all quotes that have ever been created for the account can be viewed on the seller view of the storefront.

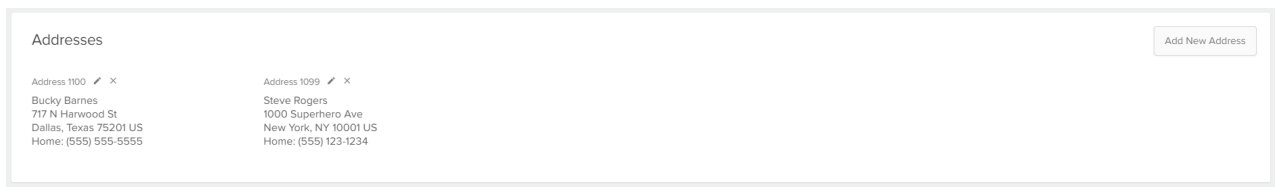
See the [Quotes](#) guide for more information about this feature.

A screenshot of the B2B Accounts interface showing the 'Quotes' section. At the top, there is a purple header with a hamburger menu icon, the text 'B2B Accounts', and an 'Active' dropdown menu. On the right side of the header, there are 'Cancel' and 'Save' buttons. Below the header, there are several tabs: 'General', 'Quotes', 'Users', 'Addresses', 'Payment Information', 'Order History', 'Audit Log', 'Lists', and 'Account Attributes'. The 'Quotes' tab is selected. Below the tabs, there is a table with the following columns: 'Number', 'Quote Name', 'Created By', 'Created Date', 'Expiration Date', and 'Quote Total'. There are four rows of data in the table. A green 'Initiate Quote' button is located in the top right corner of the table area.

Number	Quote Name	Created By	Created Date	Expiration Date	Quote Total
78	Quote 78	355060a60a5e48eeb7f2fb8d92af2ba5	Jan 28 2021 11:16am		\$0.00
84	Quote 84	355060a60a5e48eeb7f2fb8d92af2ba5	Jan 28 2021 12:41pm		\$0.00
258	Quote 258	355060a60a5e48eeb7f2fb8d92af2ba5	Feb 19 2021 4:14pm		\$0.00
280		355060a60a5e48eeb7f2fb8d92af2ba5	Feb 22 2021 10:25am		\$0.00

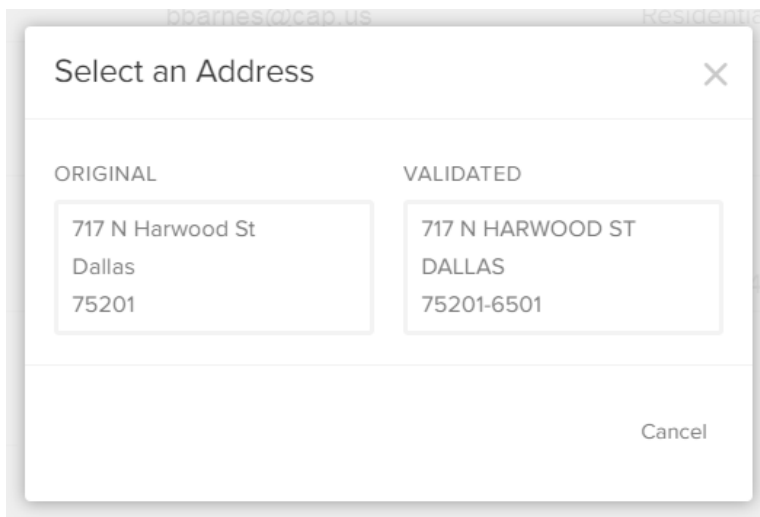
## Addresses

This section contains all of the available addresses and other contact information that buyers can use when making orders for the B2B account. Click the pencil icon next to an Address ID to edit an existing address, or click the X icon to remove it instead.



Click **Add New Address** on the right to create a new contact, which will open the below modal for you to fill out. Generally there is a limit of 20 contacts, but B2B accounts with more than 20 users will allow more contacts to be created. In this case, any new non-primary contacts will replace the oldest non-primary contact. For example, if there are 21 primary contacts then you will be able to add a 22nd non-primary contact. But if you then add a 23rd contact, that 22nd contact will be deleted assuming it is still the oldest non-primary contact.

While doing so, you can click **Validate Address** to analyze the input. The Kibo Composable Commerce Platform will provide you with an automatically edited version that may be selected for use. This validation may capitalize words, expand the zip code, or otherwise standardize the formatting.



## Payment Information

The payment information includes settings for the credit limit and overdraft allowance, and displays the current available purchase order balance of the B2B account. A history of all purchase order transactions is also included.

Enable or disable purchase orders for this account by clicking the toggle in the top right, as long as purchase orders are first enabled as a payment type for the site under **System > Settings > Payment Types**.

Payment Information

Purchase Orders

CUSTOMER SETTINGS

Credit Limit \* \$1,000,000.00

Overdraft Allowance \*  \$99,999.00

Available Balance \$999,177.95

Automation\_Sandbox\_Base Payment Terms \*  Search

PURCHASE ORDERS TRANSACTION LOG Export

Date	Site	Order Number	Order Type	PO#	Author	Transaction Details	Amount	Balance	
Mar 23 2021 6:34...	Automation_Sandb...	367	Offline	1	Kibo admin	Payment Collected	\$21.78	\$999,177.95	
Mar 23 2021 6:34...	Automation_Sandb...	367	Offline	1	Kibo admin	Payment Requested	\$21.78		Displaying 1 - 38 of 38

## Order History

The order history displays all orders that have been submitted by buyers from this B2B account. Click an order in the table to view its details.

Order History

Order Number	Submitted Date	Shopper	Ship To	Order Total	Order Status	
391	Mar 25 2021 11:48pm	Deepesh Jadhav		\$176.00	Accepted	
386	Mar 25 2021 4:30pm	Deepesh Jadhav		\$176.00	Accepted	
389	Mar 25 2021 9:56pm	Amy Shi	717 N Harwood St	\$151.00	Processing	
387	Mar 25 2021 5:15pm	Deepesh Jadhav		\$176.00	Accepted	

To initiate a new order based on a previous one, expand the drop-down menu on the far right of an order's entry in the table and click **Reorder**. This will create a new order with the same products and quantities.

Order Status	
Completed	⋮
Completed	⋮
Completed	View Order Reorder
Completed	⋮
Completed	⋮

Displaying 1 - 5 of 5

## Audit Log

The audit log provides an audit history for the Purchase Order account settings.

Audit Log		
Date	Event	User
Mar 6 2021 5:14am	Payment Term Change	Kibo admin
Mar 6 2021 5:01am	Overdraft Allowance Type Change	Kibo admin
Mar 6 2021 5:01am	Overdraft Allowance Change	Kibo admin
Mar 6 2021 5:01am	Purchase Orders Enabled	Kibo admin
Mar 6 2021 5:01am	Line of Credit Change	Kibo admin

Displaying 1 - 5 of 5

## Lists

Lists are products that buyers of the B2B account may want to order. You can create lists on the customer account-level and the wider B2B account-level, which will expose the list to all B2B buyers (including non-purchasers).

Lists		
List Title	Date Created	Created By
Steve's Super Stuff	Jan 9 2019 1:44pm	srogers@cap.us

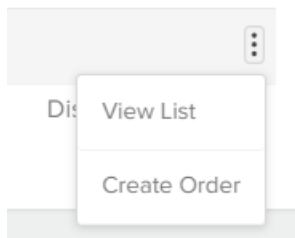
Displaying 1 - 1 of 1

The list can be created from the My Account page in the storefront, and items are then found through the search and added with the selected quantities. Pricing is applied to the items based on the pricelist of the B2B account, if applicable (this will always be the current pricing, as price locks are not supported). However, discount shipping taxes will not be available on the list. The list can then be named and saved.

List Items				
Product Name	Product Code	Price	Options	Quantity
Herman Miller Embody Chair	hm-embody	\$1,500.00	color: Blue	1
Ergodox Infinity Keyboard	ergo-inf-clr	\$372.50	ergodox-key-set-add-on: caps-ergo-car sticker-add-on: sticker-cherry	3

Displaying 1 - 2 of 2

A list can be converted into an order from the Admin UI by clicking **Create Order** from the list's drop-down options. If an item on the list is unavailable when the list is converted, then the order will be filled with all available products.



These lists can also be copied, so that the buyer does not have to recreate a list if they need to make another version of it. Copying a list will copy all products included within it, and products can then be added or removed without affecting the original list. The item quantities can also be edited on this copied list.

## Account Attributes

Custom attributes can allow different settings or display options to be configured for individual accounts within the B2B account. For example, you can create a custom attribute for a logo and set a different image for the B2B account than the merchant account so that the new logo is displayed when they log in to the storefront. Customer service representatives can also search for custom attributes to narrow down their query results when serving B2B clients.

These custom attributes can be managed by a Kibo admin, similar to existing user attributes. A B2B account can have both custom account attributes and user attributes.