

amasty

For more details see the [B2B E-commerce Suite](#) extension page.

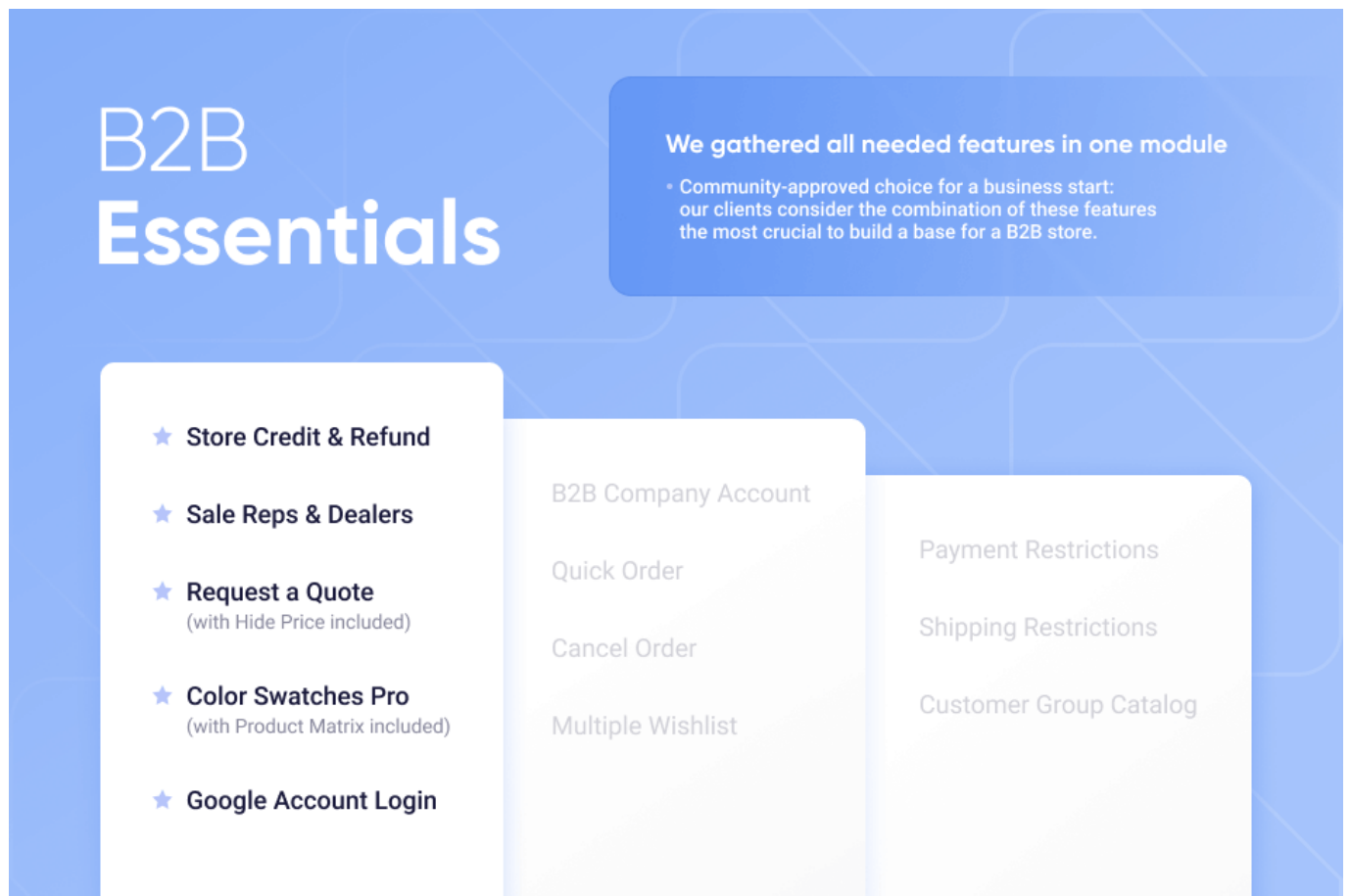
Guide for B2B E-commerce Suite for Magento 2

Level up your e-commerce store to the B2B level. Use B2B Suite with 5 included extensions to achieve all business goals needed for rapid growth.

1. Create dealers accounts
2. Adjust access limitations
3. Display configurable product matrix
4. Apply a quote system
5. Minimize losses on returns
6. Award store credits

As the suite consists of 5 extensions, you need to configure them separately.

To take on the B2B market, one might need more than native Magento 2 can offer. To help you tackle your first business challenges, we gathered all needed features in one module.



B2B Essentials

We gathered all needed features in one module

- Community-approved choice for a business start: our clients consider the combination of these features the most crucial to build a base for a B2B store.

- ★ **Store Credit & Refund**
- ★ **Sale Reps & Dealers**
- ★ **Request a Quote**
(with Hide Price included)
- ★ **Color Swatches Pro**
(with Product Matrix included)
- ★ **Google Account Login**

- B2B Company Account
- Quick Order
- Cancel Order
- Multiple Wishlist
- Payment Restrictions
- Shipping Restrictions
- Customer Group Catalog

Sales Reps & Dealers

The extension is aimed to help business owners easily create labor base and split responsibilities between workers.

Key features:

- Create multiple user roles
- Assign orders to particular dealers
- Let clients choose their dealers
- Show dealer information to clients
- Check the list of orders assigned to each dealer
- Use notifications to keep sales reps informed

To configure general extension settings, go to **Stores → Configuration → Amasty extensions → Sales Reps and Dealers**.

General

Default Dealer [global]	Frank Wilson	▼	All new orders will be assigned to this dealer except if a specific customer is already assigned to another dealer.
Send New Order Email to the Dealer [global]	Yes	▼	Indicate `Yes` to send a copy of the order email to the associated dealer.
Show Re-assign Fields [global]	Yes	▼	On the order view page in Backend.
Show From To [global]	Yes	▼	From whom to whom re-assigned order.
Show Author of Message [global]	Yes	▼	
Hide the `Manage Customers` tab [global]	No	▼	On the `Edit User` page (the `Edit Dealer` page).
Allow dealers to see all customers and orders [global]	No	▼	Indicate `Yes` to allow dealers to see all customers and orders in the system

Check how to adjust each setting [in this guide](#).

Google Account Login

Let employees easily login to an admin panel.

Key features:

- Provide rapid sign in using Google Account
- Apply automatic access administration
- Easily login from mobile devices

- Improve security level with Google account protection

Navigate to **Stores → Configuration → Amasty extensions → Google Account Login**. Enable the module.

Configuration

The screenshot shows the configuration interface for the Google Account Login extension. At the top, there is a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. On the left, a sidebar lists 'AMASTY EXTENSIONS' with a sub-menu containing 'Extensions & Notifications', 'Color Swatches Pro', 'Google Account Login' (highlighted with an orange bar), 'Request a Quote', 'Hide Price', 'Sales Reps and Dealers', and 'Store Credit'. The main content area is titled 'Google Account Login 1.0.0 by amasty' and has a 'General' section. A configuration option 'Enable Admin Login with Google [global]' is shown with a dropdown menu that has 'Yes' selected.

Click [here](#) to learn how to adjust Google Account settings.

Color Swatches Pro

With the extension, you can display prices in handy swatches, enable image flippers, zoom, configure preselect options, etc.

Key features:


- Enable product matrix
- Show prices of simple products

- Swap product image on mouse hover
- Reload product info with AJAX
- Allow customers to share URLs with custom product configs

To enable the module and adjust it, go to **Stores → Configuration → Amasty extensions → Color Swatches Pro**.

Configuration

Store View: Default Config ▾ Save Config

-  AMASTY EXTENSIONS ^
- Extensions & Notifications
- Color Swatches Pro
- Google Account Login
- Request a Quote
- Hide Price
- Sales Reps and Dealers
- Store Credit

Color Swatches Pro 2.7.3 by

General ⌵

Reloadable Information ⌵

Product Matrix ⌶

Display Last Attribute in Rows [store view] ▾

Display SKU Column [store view] ▾

Display Available Qty Column [store view] ▾

Display Subtotal Column [store view] ▾

Preselect ⌵

Zoom ⌵

Lightbox ⌵

Carousel ⌵

See this [user guide](#) to see the available configuration options.

Request a Quote

Suite includes the functionality that lets you offer personalized pricing for each client.

Key features:

- Let clients request quotes from any page
- View and manage all quotes in a separate grid
- Automatically approve quotes with specific conditions
- Let guest visitors ask for quotes
- Easily turn quotes into orders

To enable quote request availability, proceed to **Stores → Configuration → Amasty extensions → Request a Quote**.

General

Enable 'Request a Quote' [store view] Yes

'Add to Quote' button on Product Page [store view] Show

'Add to Quote' button on Category Page [store view] Show

Disable Quotation for Categories [store view]

- ... Gear
- Bags
- Fitness Equipment
- Watches
- ... Training

'Add to Quote' button will be hidden for each product from the selected categories. This setting is applied to product list and product page.

Allow Quote Request for Customer Groups [store view]

- Not Logged In
- General
- Wholesale
- Retailer

If 'Not Logged In' option is chosen, guest users will insert email addresses upon quote submission and accounts will be created automatically.

A detailed configuration guide you can find [here](#).

Hide Price

Key features:

- Limit prices visibility on category and product pages

- Disable 'Add to Cart' and 'Add to Wishlist' buttons
- Show prices to specific customer groups only
- Customize text messages
- Redirect clients to any form or page

To hide prices display, go to **Stores → Configuration → Amasty extensions → Hide Price**.

Configuration

Store View: Default Config ▾ Save Config

AMASTY EXTENSIONS ^

Extensions & Notifications

Color Swatches Pro

Google Account Login

Request a Quote

Hide Price

Sales Reps and Dealers

Store Credit

Hide Price 1.5.14 by **amasty**

General Settings ▾

Hide Price Options ▴

Hide Price <small>[store view]</small>	<input type="text" value="Yes"/>	<input type="button" value="▾"/>
Hide "Add to Cart" <small>[store view]</small>	<input type="text" value="Yes"/>	<input type="button" value="▾"/>
<small>Hide 'Add to Cart' or replace it with the custom button, e.g. 'Sign up' or 'Get a Quote'</small>		
Hide "Add to Wishlist" <small>[store view]</small>	<input type="text" value="Yes"/>	<input type="button" value="▾"/>
<small>Hide wishlist link when price is hidden</small>		
Hide "Add to Compare" <small>[store view]</small>	<input type="text" value="Yes"/>	<input type="button" value="▾"/>
<small>Hide compare link when price is hidden</small>		

Frontend Options ▾

Admin Email Notifications ▾

Auto Reply Email Options ▾

amasty

Check how to adjust price display for particular products, categories or even customer groups [here](#).

Store Credit & Refund

B2B Suite also includes the solution to improve retention by granting store credits, that clients can use for further purchases.

Key features:

- Add or subtract any store credit amount from the admin panel
- Let clients spend their credits on new purchases
- Process refunds with store credits application
- Show store credit and refunds balance in customer account
- Send notifications about any changes in balance

To activate the functionality, navigate to **Stores → Configuration → Amasty Extensions → Store Credit**.

Configuration

Store View: Default Config ▾ Save Config

AMASTY EXTENSIONS ^

Extensions & Notifications

Color Swatches Pro

Google Account Login

Request a Quote

Hide Price

Sales Reps and Dealers

Store Credit

General

Enable Module [store view] ▾

Refund Store Credit Automatically [global] ▾ ?

Allow applying Store Credit on Tax [store view] ▾

Allow applying Store Credit on Shipping [store view] ▾

Email Notification

Elastic Search

Click [here](#) to check the configuration for all extension settings. After configuring all of the necessary functionality, you will get a structured dealers base, flexible pricing system, platform for quotes negotiations and advanced UI with multiple product options. Thus, your store will turn into a powerful B2B e-commerce solution, which covers all specific business needs.

B2B SUITE PRO: More Options for Professionals

After the successful B2B start, the next challenge is to turn customers into lifetime clients. Upgrade your suite to a PRO version to provide advanced bulk purchasing options and B2B account system.

Keep in mind, that all **B2B Essential features** are included.

The image shows a promotional graphic for 'B2B Pro'. On the left, the text 'B2B Pro' is displayed in a large, white, sans-serif font against a dark background. To the right, a dark grey rounded rectangle contains the text 'Must-have for efficient B2B communications' followed by a bullet point: 'We expanded the solution with features for bulk order planning, management, cancellation, and approval. Meet advanced B2B needs with one solution.' Below this, a white rounded rectangle lists features with blue star icons: 'Store Credit & Refund', 'B2B Company Account', 'Sale Reps & Dealers', 'Quick Order', 'Request a Quote (with Hide Price included)', 'Cancel Order', 'Color Swatches Pro (with Product Matrix included)', 'Multiple Wishlist', and 'Google Account Login'. To the right of this list, another white rounded rectangle lists additional features in a lighter grey font: 'Payment Restrictions', 'Shipping Restrictions', and 'Customer Group Catalog'.

Multiple Wishlists

B2B PRO includes options that let clients create multiple wishlists and requisition lists.

Key features:

- Present multiple wishlists and requisition lists in customer accounts
- Convert wishlists to orders with the 'Add to Cart' button
- Mar lists with comments and notes
- Add products to wishlists by SKU or product name
- Analyze client demands with the wishlist report

To activate the functionality, go to **Stores → Configuration → Amasty Extension → Multiple Wishlist**.

Multiple Wishlist 1.0.0 by **amasty**



Need help with the settings? Please consult the [user guide](#) to configure the extension properly.

General



Enabled
[store view]

Yes



See the frontend examples and configuration [here](#).

Quick Order

For B2B sales it's important to provide options for convenient bulk purchasing without visiting each product page every time. In this suite it is possible with the Quick Order page.

Key features:

- Let clients add products by SKU/Name
- Create orders by inserting multiple SKUs
- Import products for orders via CSV and XML files
- Allow buyers to specify custom product options
- Provide convenient quick order UX on mobile

To enable the functionality, proceed to **Stores → Configuration → Amasty Extensions → Quick Order**.

General

Enabled [store view]

URL Key [store view]

Based on Website Base URL. If left empty, default 'quick-order' is used.

Label [store view]

Here you can name the functionality the way you would like it to be displayed on the storefront. If left empty, default Quick Order is used.

Display Link in [store view]

Page Header

Top Menu

Page Footer

Choose where to display a link.

Disable for Customer Groups [store view]

Not Logged In

General

Retailer

Wholesale

Chosen customer groups won't be able to Quick Order.

Find out frontend examples and configuration details [here](#).

Cancel Orders

Let clients cancel irrelevant orders in their accounts. Your store admins can also automatically cancel orders without payments after a specified period.

Key features:

- Allow clients to cancel orders in accounts
- Show cancellation popup
- Collect cancellation reasons
- Track annulation requests
- Notify your managers about new cancellations
- Automatically restock cancelled items

Go to **Stores → Configuration → Amasty Extensions → Cancel Orders**.

Cancel Orders 1.0.0 by **amasty**

i Need help with the settings? Please consult the [user guide](#) to configure the extension properly.

General ⌆

Enabled [store view] ▼

Allow for Selected Group(s) [store view]

- General
- Retailer
- Wholesale

Allowed Order Status(es) [store view]

- Pending
- Processing
- Suspected Fraud

Refund Paid Processing Orders Automatically [store view]

- Online (if possible)
- Disabled
- Online (if possible)**
- Offline

See how to adjust cancellation and set automatic annulation [in this guide](#).

B2B Company Account

With the suite, clients can register company accounts, manage permissions and organize purchasing by the individual flow.

Key features:

- Create multiple company accounts as an admin;
- Companies can create and manage sub-accounts from the frontend;
- Move users between company accounts in the backend;
- Manage all company accounts in one place;

- Offer personalized marketing and pricing based on company membership.

Navigate to **Stores → Configuration → Amasty Extensions → Company Account**.

Company Account 1.0.0 by **amasty**

i Need help with the settings? Please consult the [user guide](#) to configure the extension properly.

General

Allow Company Creation for Customer Group(s) [global]

Big Whale Development LTD
Business Company
Example Company LLC
General
Retailer
Small companies
Wholesale

Approve Companies Automatically [global]

No

If set to Yes, all new companies will automatically get Active status.

Inactivate Customer upon Removing from Company Account [global]

Yes

If disabled, the customer will still remain Active after being removed from Company in admin panel. Note: you can change Customer's Status on Customer edit page.

See detailed configuration guide [here](#).

As a result, with the PRO Suite you will set an individual and convenient purchasing options for wholesalers and regular clients: wishlists, a quick order page and tiered accounts.

B2B SUITE PREMIUM: All That You Need at a Hand

With the PREMIUM pack, you will equip your store with all options needed for highly-personalized approach. Automate all the functionality to build a professional store.

Keep in mind, that all **B2B Essential and PRO features** are included.

B2B Premium

Powerful one-stop solution for B2B growth

- Top choice for professional merchants growing their business. Includes all features from the Essentials and Pro versions, plus the extended shipping and payment functionality.

- ★ Store Credit & Refund
- ★ B2B Company Account
- ★ Payment Restrictions
- ★ Sale Reps & Dealers
- ★ Quick Order
- ★ Shipping Restrictions
- ★ Request a Quote
(with Hide Price included)
- ★ Cancel Order
- ★ Customer Group Catalog
- ★ Color Swatches Pro
(with Product Matrix included)
- ★ Multiple Wishlist
- ★ Google Account Login

Customer Group Catalog

Create an individual selling strategy for all your clients using separate catalogs and resonalized pricing strategy.

Key features:

- Adjust the visibility of products and categories by customer groups
- Provide businesses with selective access to store catalog
- Hide or replace product price with CMS-block or image
- Redirect users to custom CMS-pages or to 404 page

To configure these options, go to **Store → Configuration → Amasty Extensions → Customer Group Catalog**.

General Settings

Enable module
[global]

Yes

Email Sender for Admin 'Get a Quote' Reply Email
[global]

General Contact

Email Template for Admin 'Get a Quote' Reply Email
[global]

Amasty 'Get a Quote' Answer

Email template chosen based on theme fallback when "Default" option is selected

Frontend Options

Admin 'Get a Quote' Email Notifications

Auto Reply 'Get a Quote' Email Options

Developer Options

To check detailed guide for the extension, click [here](#).

Moreover, [Customer Group Auto Assign](#) and [Reindex from Admin](#) are also included in the pack. Thus, you can automatically transfer customers from one group to another and reindex all changes without a command line.

Payment Restrictions

The suite includes options that limit payment methods availability according to specific parameters. It means that you can let particular methods for specific customer groups only, e.g. offline methods will be available for long-term clients and won't be visible for guests.

Key features:

- Use customer purchase history to decide which payment methods to show
- Set restrictions based on cart contents
- Display different payment methods for orders depending on Subtotal or customer attributes
- Apply restrictions depending on customer shipping address

Create limitation rules in the **Amsty** → **Payment Restrictions** tab.

Payment Restrictions

 demouser ▾

Add Rule

Filters

 Default View ▾

 Columns ▾

Actions ▾

2 records found

20 ▾

per page

<

1

of 1

>

<input type="checkbox"/>	Status	Name	Methods	Customer Groups	Store Views	Action
<input type="checkbox"/>	Active	Offline Payments for Wholesales	Offline - Bank Transfer Payment, Offline - Cash On Delivery, Offline - Check / Money order, Offline - No Payment Information Required, Offline - Purchase Order	General, Retailer	Default Store View	Duplicate
<input type="checkbox"/>	Active	PayPal for Wholesalers	Paypal - Credit Card (Payflow Advanced), Paypal - Credit Card (Payflow Link), Paypal - Credit Card (Payflow Pro), Paypal - PayPal Billing Agreement, Paypal - PayPal Credit (Payflow Express Bml), Paypal - PayPal Credit (Paypal Express Bml), Paypal - PayPal Express Checkout, Paypal - PayPal Express Checkout Payflow Edition, Paypal - Payment by cards or by PayPal account, Paypal - Stored Cards (Payflow Pro)	Restricts For All	Default Store View	Duplicate

View configuration details [in this guide](#).

Shipping Restrictions

Also, you may use shipping options as a special benefit for your clients. Enable particular methods for any of them using restrictions for others.

Key features:

- Define a specific area of each shipping method application
- Restrict shipping methods of particular carriers
- Offer shipping methods depending on their purchase history
- Choose the kind of orders, to which shipping restriction rules should be applied
- Assign special shipping methods to specific stores and customer groups

Adjust methods in the **Amasty** → **Shipping Restrictions** section.

Shipping Restrictions

demouser

Add Rule

Filters

Default View

Columns

Actions

2 records found

20

per page

1

of 1

<input type="checkbox"/>	ID	Status	Name	Carriers	Methods	Customer Groups	Store Views	Action
<input type="checkbox"/>	1	Active	For Canada	DHL [dhl] Federal Express [fedex] Flat Rate [flatrate] Best Way [tabletrate] Free Shipping [freeshipping] United Parcel Service [ups] United States Postal Service [usps]	Any	Restricts For All	All Store Views	Select
<input type="checkbox"/>	2	Active	Free Shipping for Wholesalers	Free Shipping [freeshipping]	Any	NOT LOGGED IN General Retailer	All Store Views	Select

Check advanced configuration cases [here](#).

When all options are properly configured, your store will be 100% ready for a successful B2B model. Just choose your own strategy to make your business maximally profitable.

Find out how to install the B2B Suite for Magento 2 via [Composer](#).

From:

<https://stg.amasty.net/docs/> - **Amasty Extensions FAQ**

Permanent link:

https://stg.amasty.net/docs/doku.php?id=magento_2:b2b_ecommerce_suite



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