amasty

For more information, see the way the B2B Company Account for Magento 2 extension works.

Guide for B2B Company Account for Magento 2

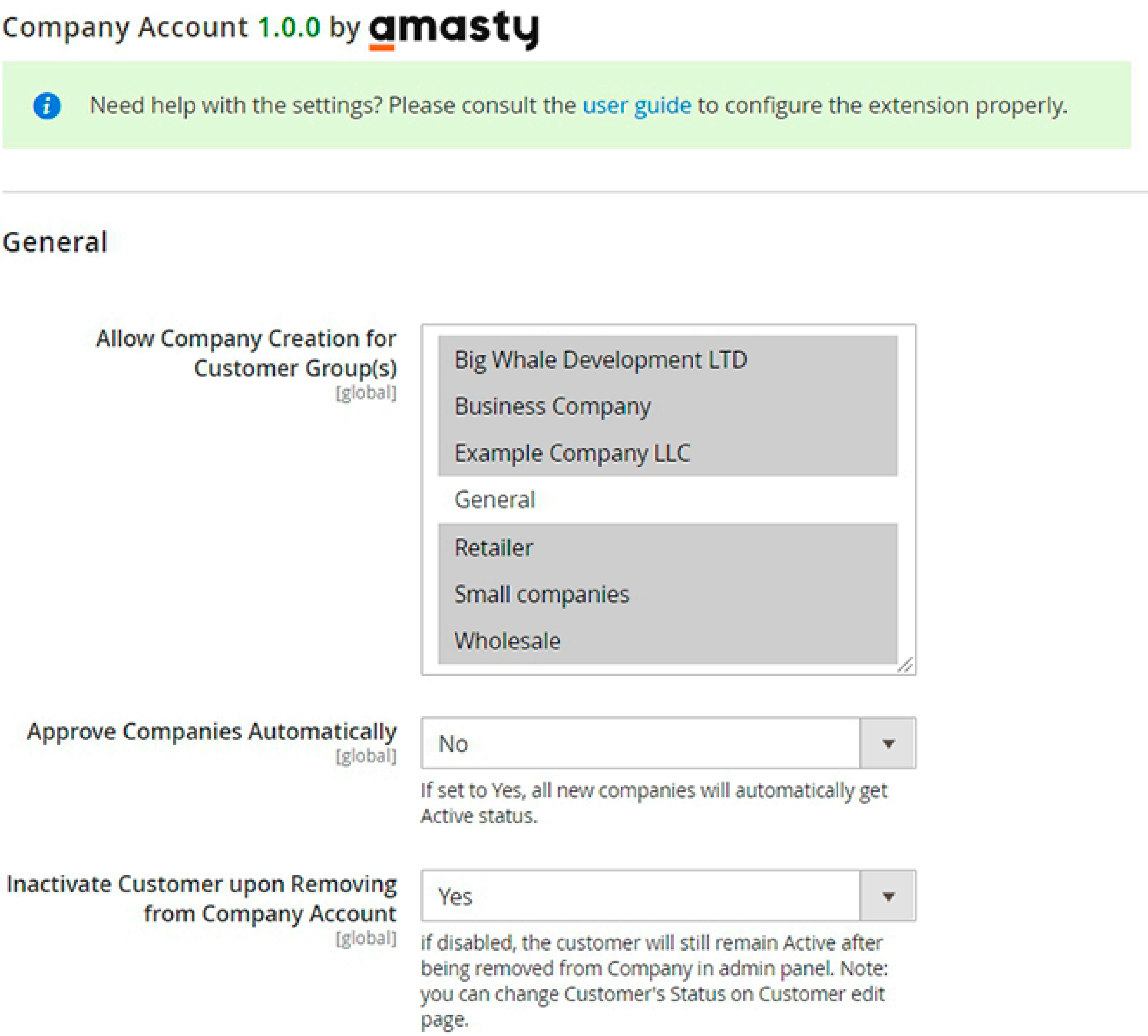
Simplify purchases for your customers by introducing B2B Company Accounts to Magento 2 store. Let companies register multiple user accounts, allow special permissions to enhance the shopping, and get more orders.

- Create multiple company accounts as a store admin;
- Allow businesses to create and manage sub-accounts from the frontend;
- Transfer users between company accounts in the backend;
- Easily manage all company accounts in one place;
- Offer personalized marketing and pricing based on company membership.

General Settings

To configure the **B2B Company Account** extension on your Magento 2 instance, start by adjusting the **General Settings**.

To access **General Settings**, please go to **Stores → Configuration → Amasty Extensions → Company Account**.



Allow Company Creation for Customer Group(s) - choose the customer groups that will see the *Company Account* tab in their customer account. It is especially handy if your store sells both to businesses and regular shoppers.

Approve Companies Automatically - set to *Yes* if you want all new company creation request automatically transfer to *Active* status without store admin approval. Set to *No*, if you want to approve each company request manually.

Inactivate Customer upon Removing from Company Account - set to *Yes* to inactivate user account upon removing from company account by the store admin.

Please note that, if the company administrator deleted a user from the company account management panel, the user will be permanently deleted from the system. In case the user will be deleted from store backend by store admin, the **Inactivate Customer upon Removing from Company Account** configuration in General Settings determines, what status (Active or Inactive) such user account would acquire.

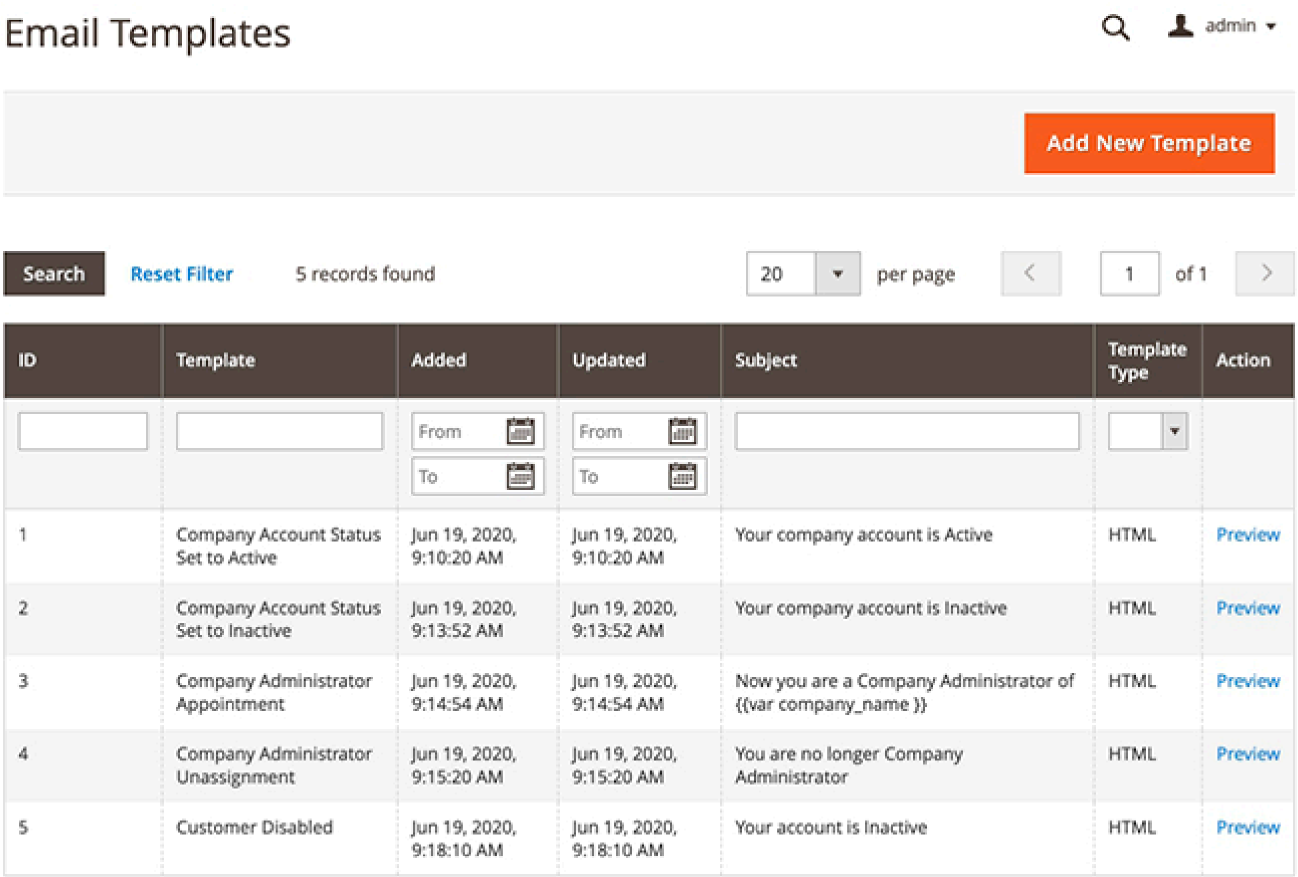
Admin Notification

In the **Admin Notification** section store admins can configure what email notifications will be sent to store admins upon a specified event. Also, adjust the template that will be used for each notification type.

You can send automatic emails for events like:

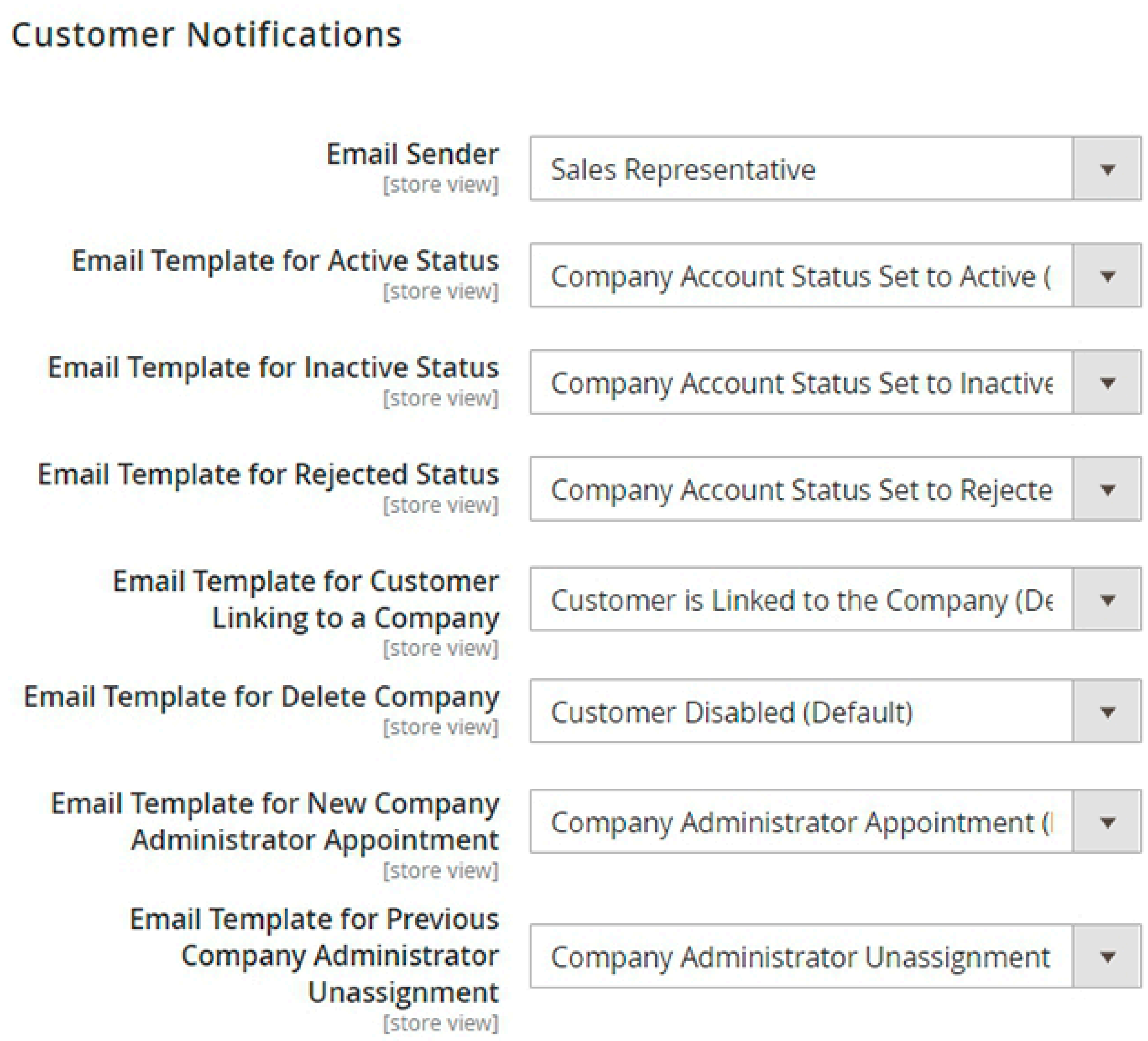
- New company registration request;
- New company creation;
- Sales representative appointment.

To manage the email templates, please go to **Marketing → Communications → Email templates**. Then, load the template by clicking the **Add New Template** button. After that, choose the template you'd like to load and adjust to your needs.



Customer Notification

In the **Customer Notification** section store admins can configure what email notifications will be sent to customers upon a specified event. Also, adjust the template that will be used for each notification type.



You can send automatic emails for events like:

- Company account status is set to Active;
- Company account status is set to Inactive;
- Company account status is set to Rejected;
- Customer is linked to the company;
- Customer is deleted from the company;
- New company administrator appointment;
- Previous company administrator unassignment.

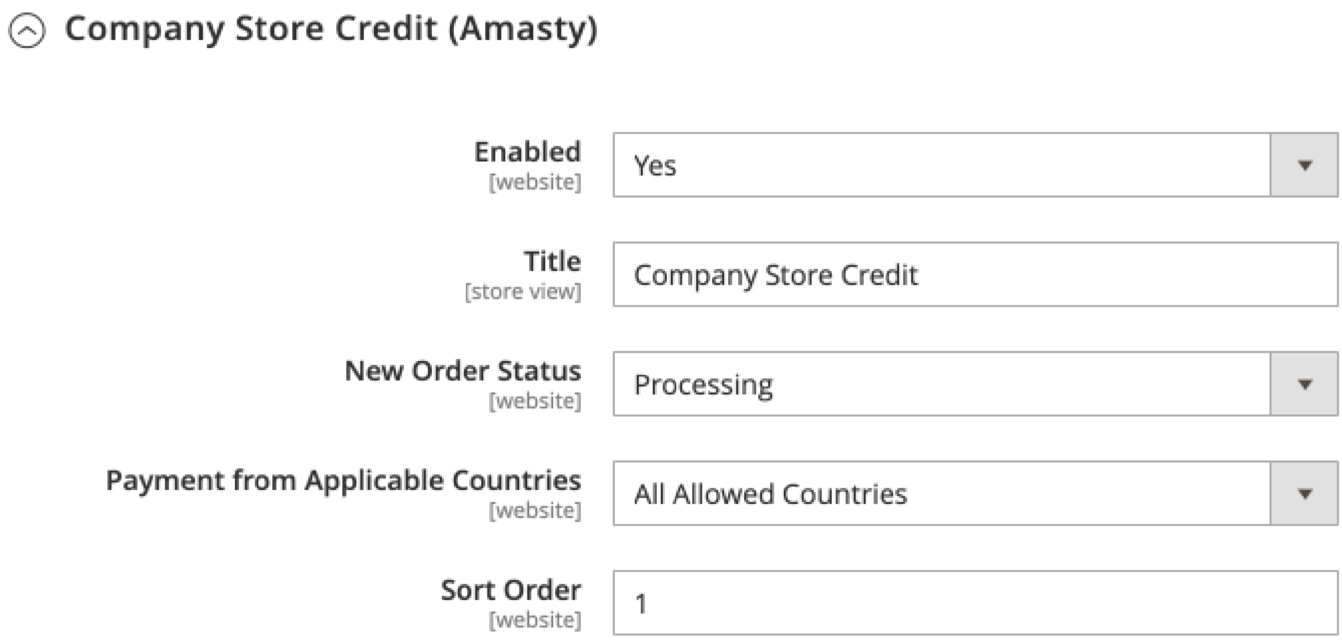
To manage the email templates, please go to **Marketing → Communications → Email templates**

Company Store Ctredits Payment Method

To allow a new offline payment method in your store, first, you need to go to the **Stores → Configuration → Sales → Payment Methods**. Then, please kindly scroll down to the **Other**

Payment Methods → Company Store Credit (Amasty) tab, and click on the *Company Store Credit Tab*.

Please kindly note that the B2B Company Account extension **doesn't** handle the payments similarly to the PayPal or Braintree integrations. It is intended to use as an offline payment method, where the extension covers transaction logging/tracking tool. And the money transfers itself are should be handled in any other convenient for the store way, e.g. wire transfers, credit cards payments using PayPal or any other payment methods that are available.



Enabled - set to *Yes* to allow Company Store Credits functionality in the store.

The *Enabled* setting allows using Company Store Credits as a payment method for **ALL COMPANIES**. In case you don't want to allow using Store Credits for certain companies, you need to proceed in the following order:

1. First, go to the Company Account settings for each *CompanyName* that you'd like to exclude from Store Credits payment method. To do that, please go to **Customers → Amasty Company Accounts → Manage Companies → Select *CompanyName* on the grid → Click *Edit***

2. Scroll down to the **Payment Restrictions** tab and select **Company Store Credits**.

3. Hit the **Save** button.

4. Do the same action of restricting *Company Store Credit* for each company that you don't want to be using Store Credits.

5. Go back to **Configuration → Sales → Payment Methods** to finalize configuring new offline payment method.

Title - Customize the payment method name, so that an appropriate naming will be visible on the store frontend.

New Order Status - Set the Order Status that will be automatically assigned to all new orders that were placed using Store Credits as a payment option.

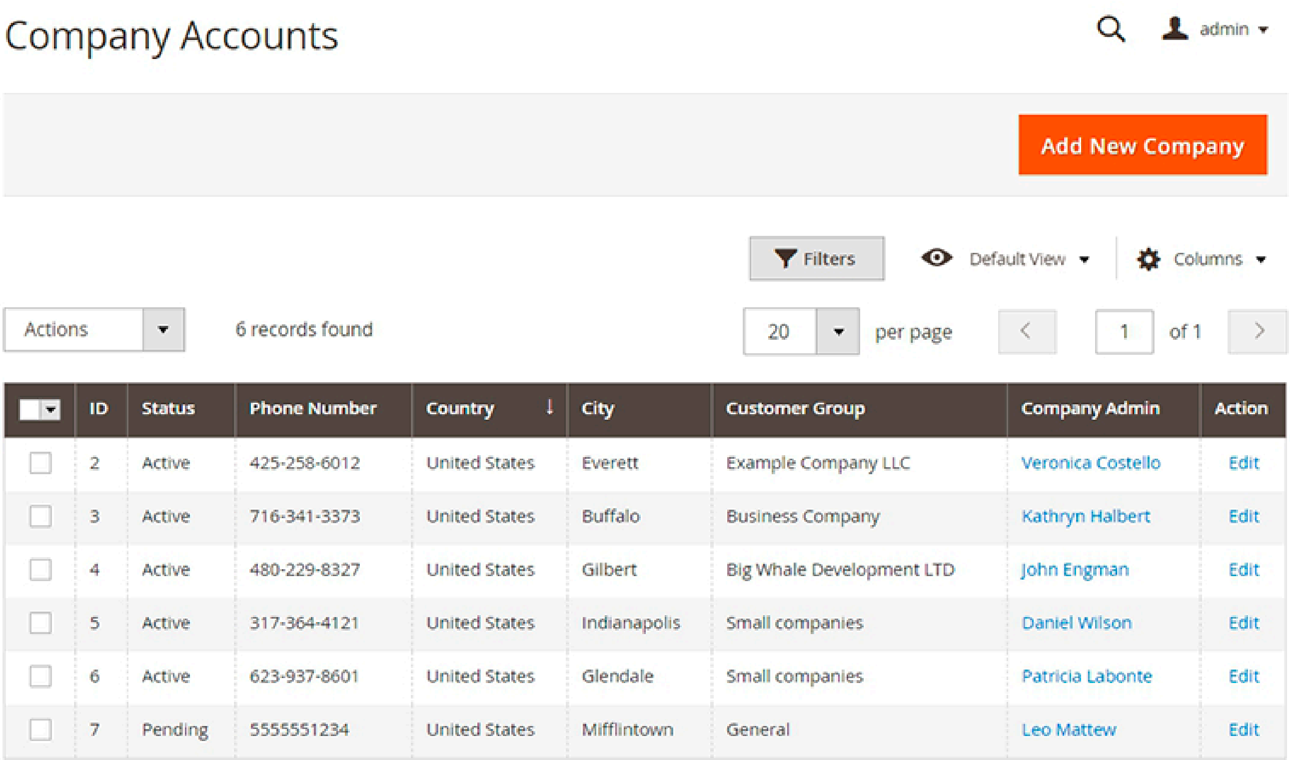
Payment from Applicable Countries - select the **All Allowed Countries** if the payment method has to be available for every eligible company no matter what country they set in the Address field. In case you want to restrict Store Credit availability, select the **Payment from Specific Countries**, and a new setting will appear.

Payment from Specific Countries - select all countries that will be allowed to pay with Store Credits.

Sort Order - set the display priority of this payment method on the checkout frontend. Enter a whole number, where the 0 is the highest position, and 3892 is much lower.

Company Accounts

To manage all company accounts from the backend as a store admin, kindly go to **Customers → Amasty Company Accounts →Manage Companies**. Then, a **Company Accounts** grid will open.



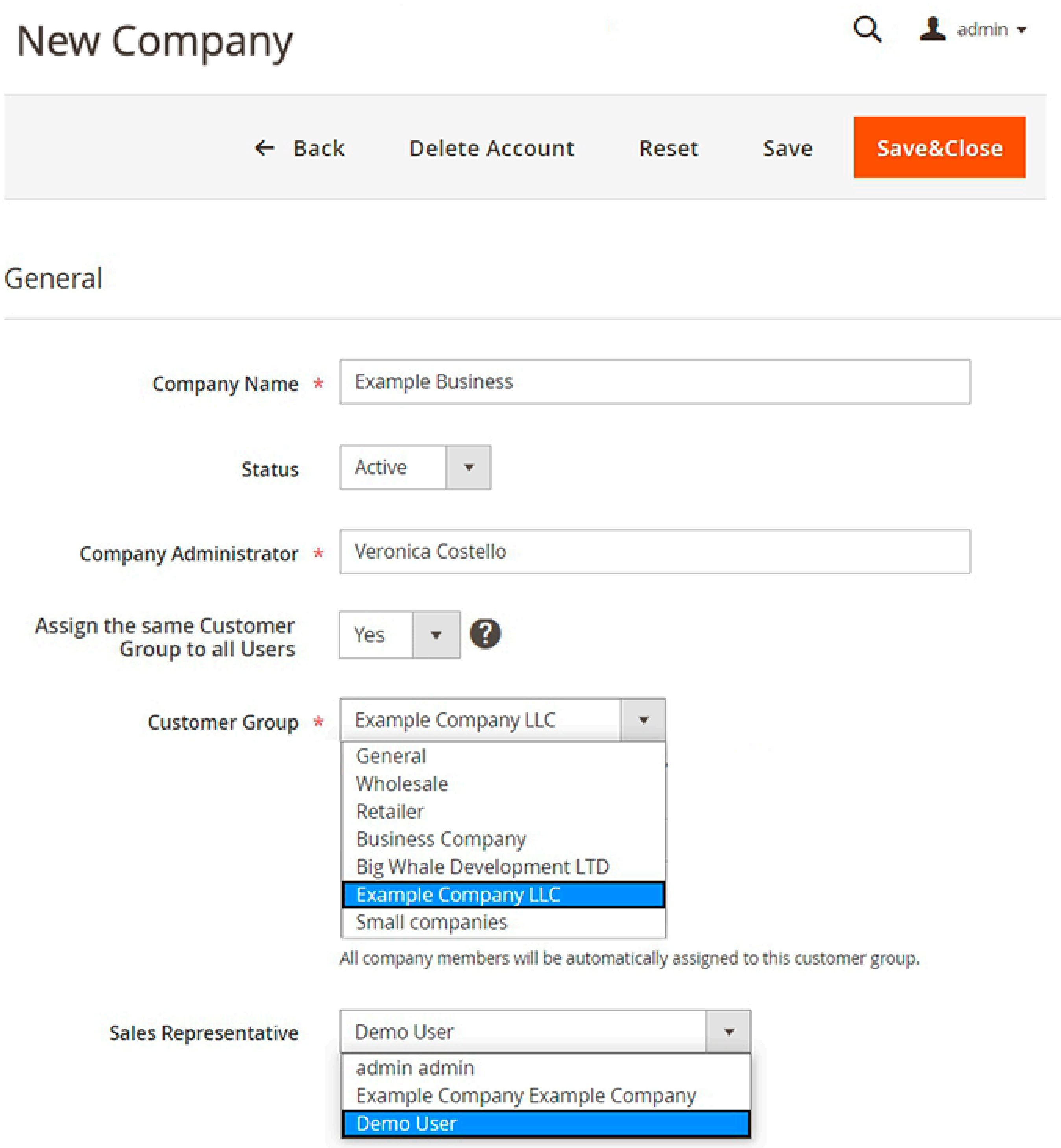
On the grid, you can see all company accounts that are created in your store, and track the company status for each of them. The information like company phone number, customer group, company admin, country, and the city is also displayed by default.

To add a new company account manually from the backend, kindly click the **Add New Company** orange button in the top-right corner of the screen.

How to add new Company Account from the backend

To create a new company account from the backend as an admin, you need to complete 4 blocks with company information.

General Settings

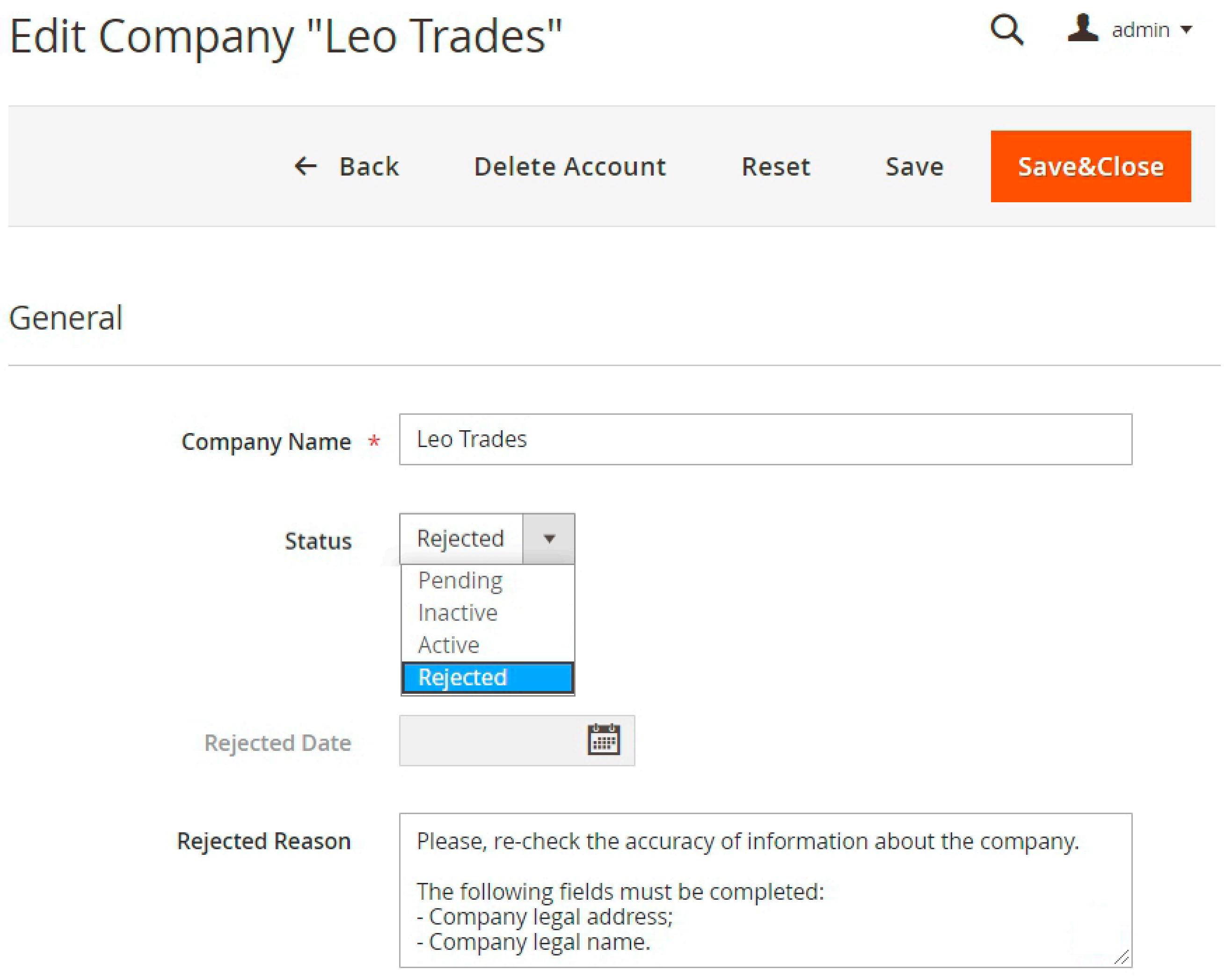


Company Name - enter company name.

Status - choose the status of the company. When creating a company, only 3 statuses are available: *Active, Inactive, Rejected*.

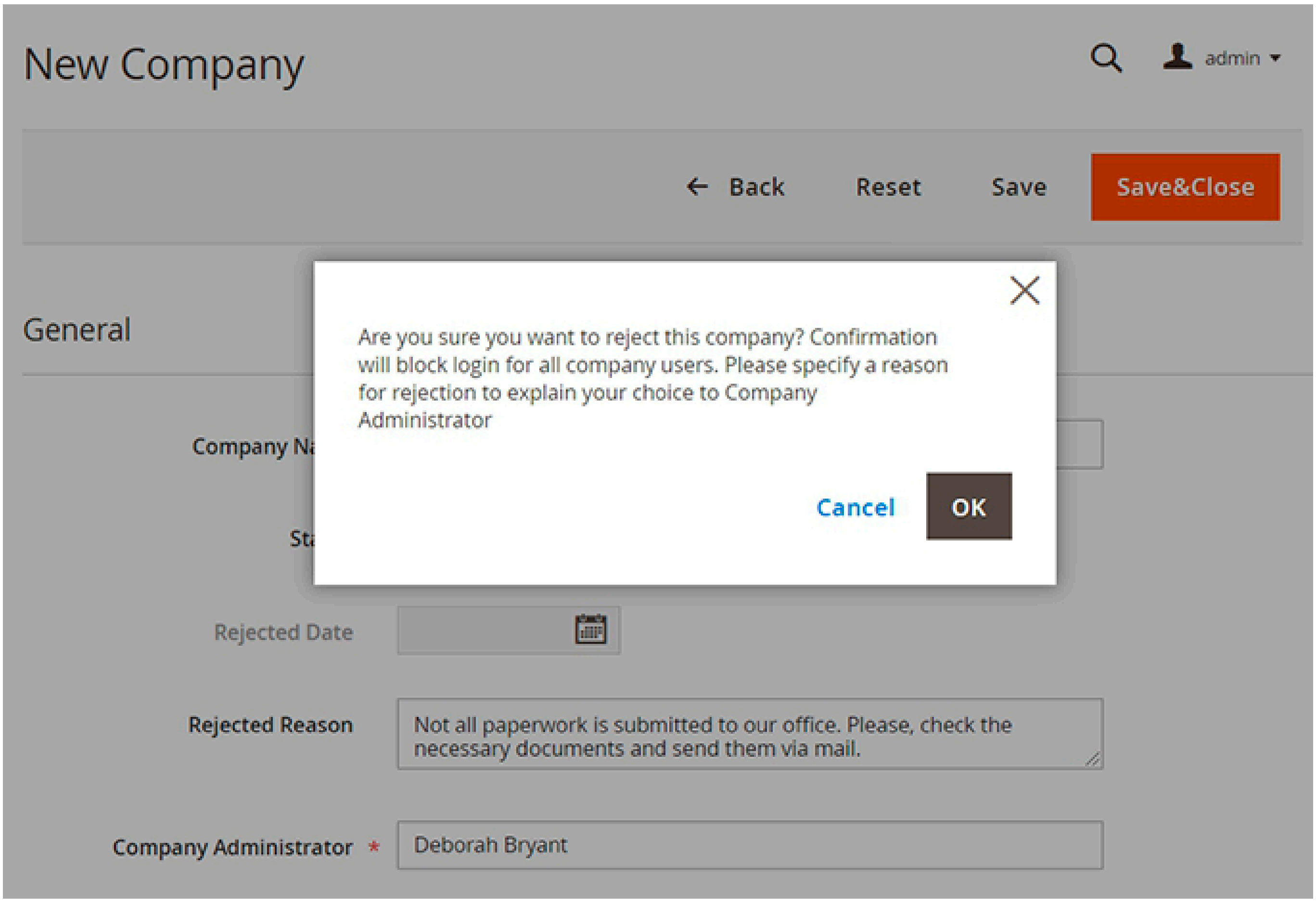
However, if you are editing the company account based on company account registration request from the frontend, a **Pending** status will appear.
In case the store admin decides to assign the **Rejected** status to a company, several more fields will

appear.



Rejected Date - this field will be completed automatically, based on the date when the *Rejected* status was assigned.

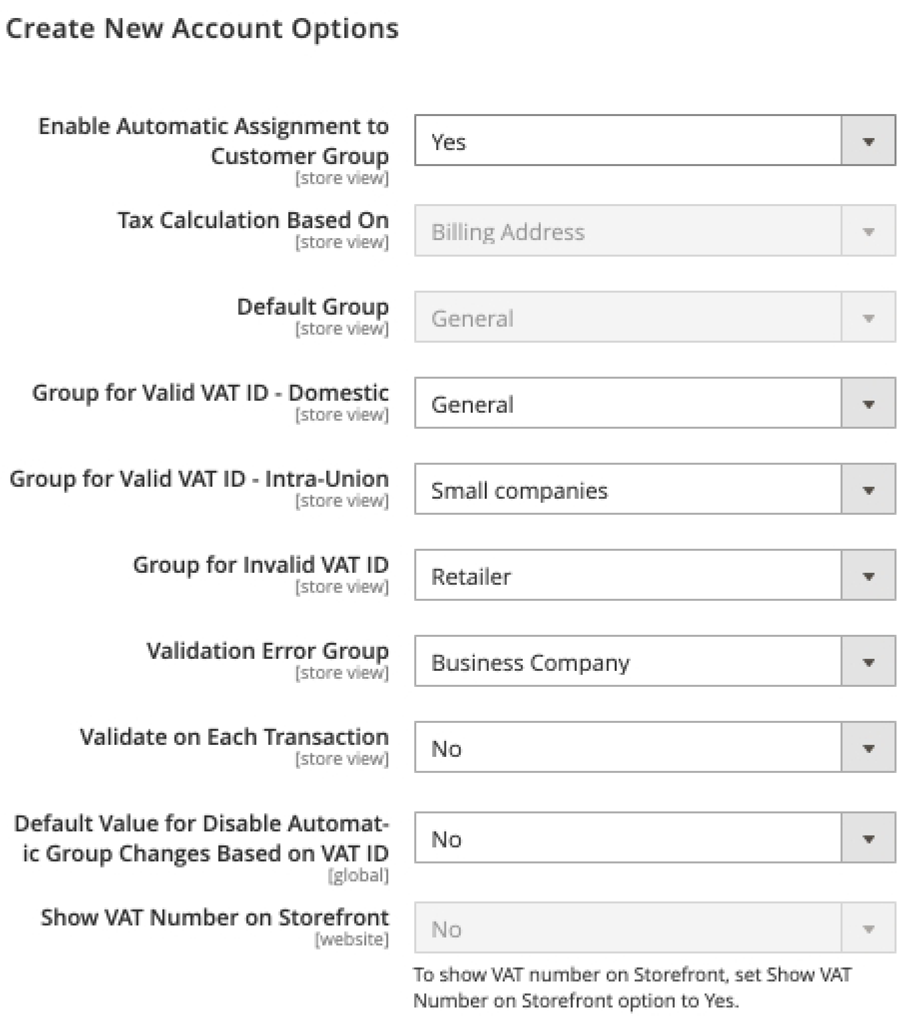
Rejected Reason - here you can specify the reason as to why the company was denied.



After the pressing the **Save** button with *Rejected* company status, the warning popup appears. It is designed to prevent any accidental rejects, and admins will be asked to fill in the *Rejected Reason* field to communicate the reasons for company disapproval.

Assign the same Customer Group to all Users - set to *Yes* to automatically assign customer groups to all users that will belong to the chosen company.

If your business prefers to assign customer groups based on VAT ID's as specified in **Store → Configuration → Customers → Customer Configuration → Create New Account Options**. Then you might want to choose the **Assign the same Customer Group to all Users** set to **No** to disable automatic assign to one customer group based on the company.



You can try the way it works in your store on the B2B Company Account extension demo.

Company Administrator - choose a company administrator from the list of existing customers.

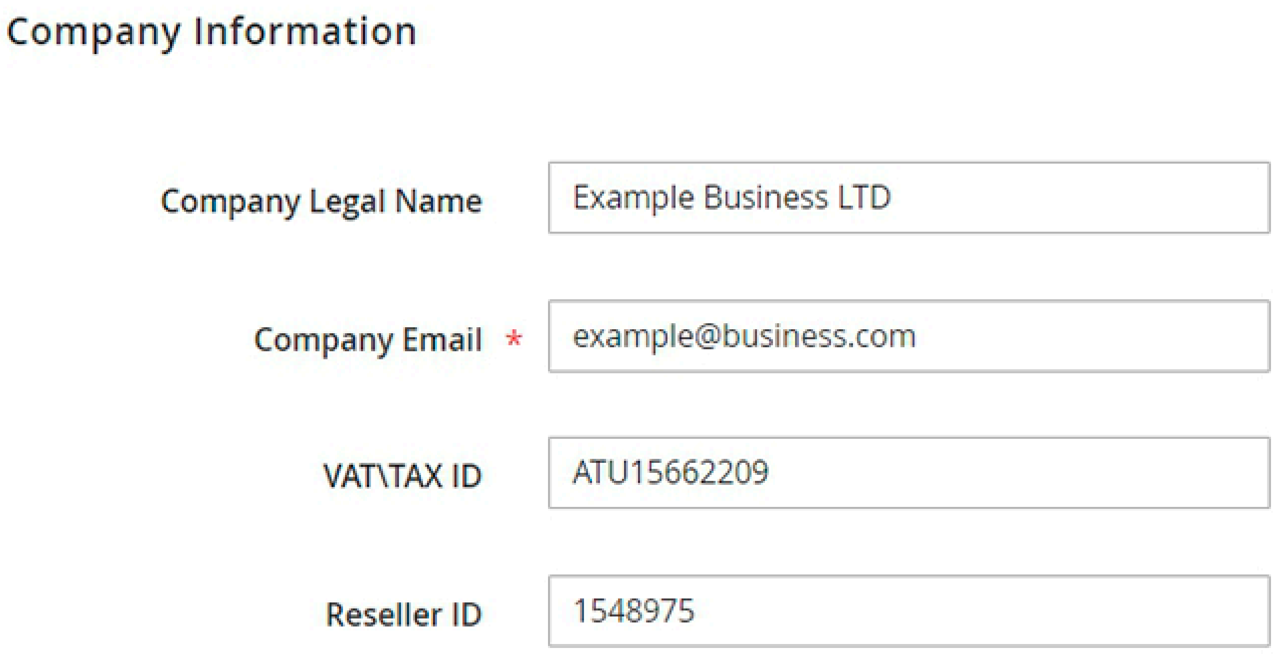
Customer Group - choose the customer group that will be assigned for all company members. Note that, you can also create custom customer groups for each specific company. It comes in especially handy if you want to restrict access to certain catalog pages or offer tier pricing based on user group.

Sales Representative - choose the Sales Representative for the company.

The *Sales Representative* users are configured in the **System → Permissions → All users**. You can assign special permissions for a users with Magento 2 *User Roles* functionality.

Company Information

In the **Company Information** block, you'll be asked to fill in the main info on the company.



Company Legal Name - enter the company legal name, as it is registered in official paperwork.

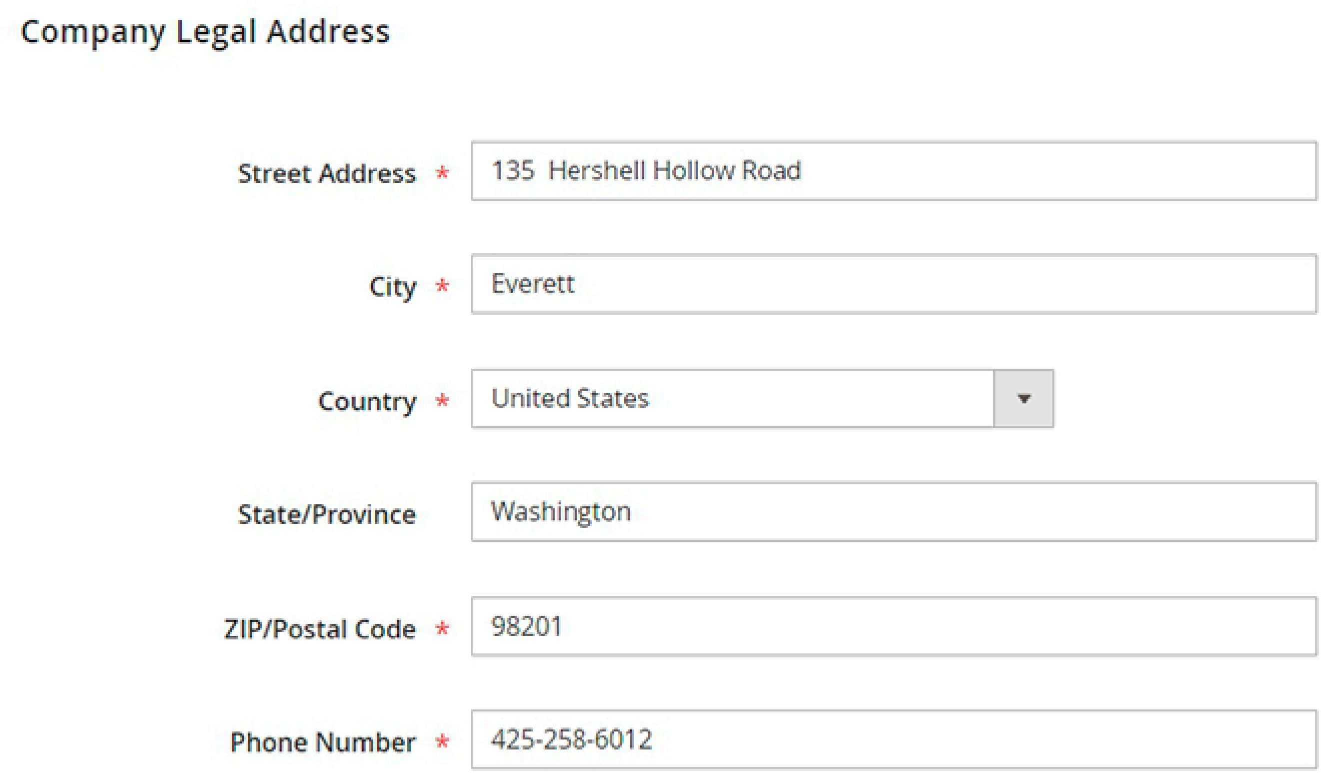
Company Email - enter the main email to contact the company.

VAT\TAX ID - enter the VAT/TAX ID number. It is the value-added tax number that is assigned to the company by some jurisdictions for tax reporting purposes. It is highly useful for EU businesses, and also in many other countries.

Reseller ID - enter the resale number that is assigned to the company for tax reporting purposes.

Company Legal Address

In the **Company Legal Address** block, you'll be asked to fill in the main info on the company registration address.



Street Address - add the street address where the company is registered to conduct business.

City - enter the city name where the company is registered to conduct business.

Country - choose the required country name from the dropdown list.

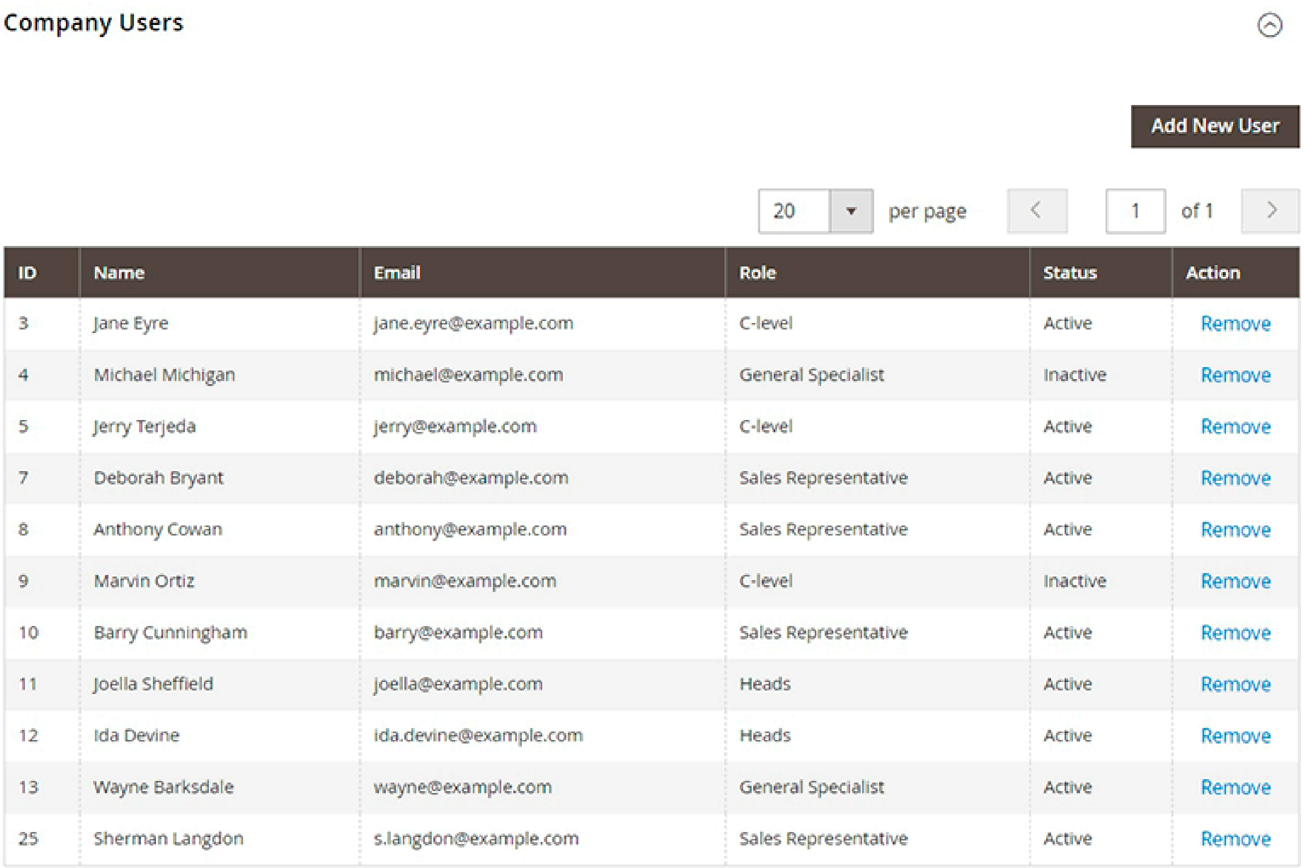
State/Province - enter the state or province, if applicable for a specific company.

ZIP/Postal Code - add the ZIP or postal code where the company is registered to conduct business.

Phone Number - enter the main phone number for the company.

Company Users

In this block, store admin can assign or unassign existing users to a new company from the backend. To add users, click on the **Add New User** in the top-right corner of the block.

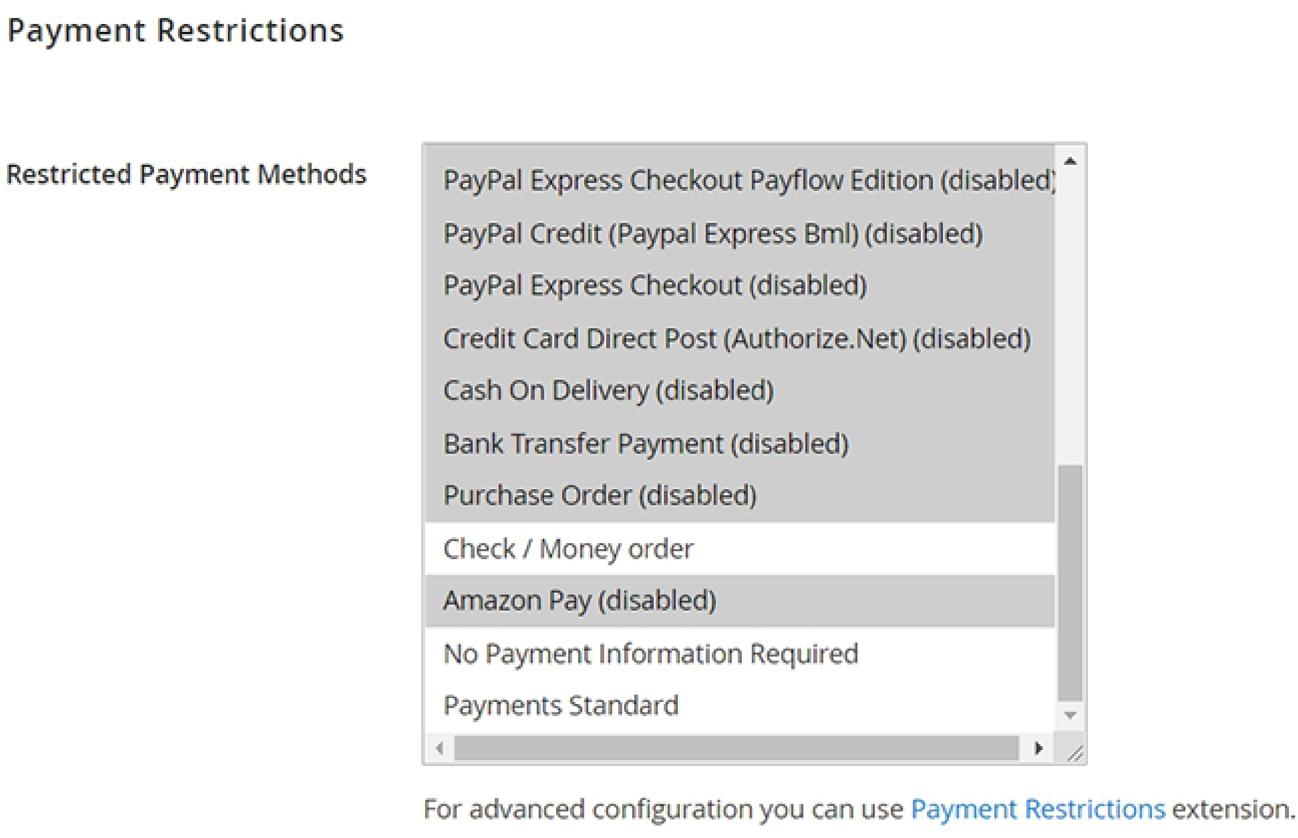


ID	Name	Email	Role	Status	Action
3	Jane Eyre	jane.eyre@example.com	C-level	Active	Remove
4	Michael Michigan	michael@example.com	General Specialist	Inactive	Remove
5	Jerry Terjeda	jerry@example.com	C-level	Active	Remove
7	Deborah Bryant	deborah@example.com	Sales Representative	Active	Remove
8	Anthony Cowan	anthony@example.com	Sales Representative	Active	Remove
9	Marvin Ortiz	marvin@example.com	C-level	Inactive	Remove
10	Barry Cunningham	barry@example.com	Sales Representative	Active	Remove
11	Joella Sheffield	joella@example.com	Heads	Active	Remove
12	Ida Devine	ida.devine@example.com	Heads	Active	Remove
13	Wayne Barksdale	wayne@example.com	General Specialist	Active	Remove
25	Sherman Langdon	s.langdon@example.com	Sales Representative	Active	Remove

Payment Restrictions

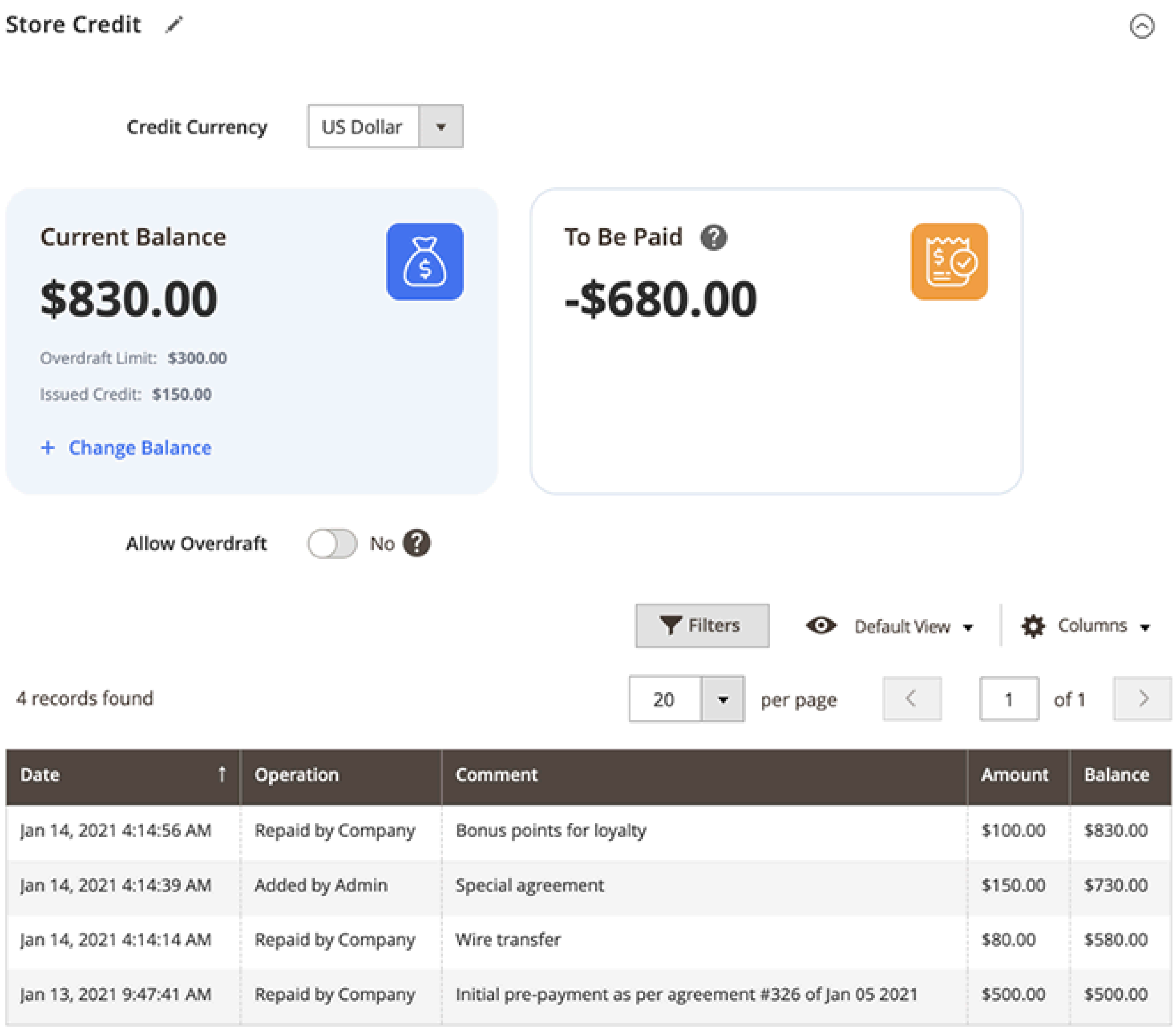
In this block, store admin can adjust what payment methods are allowed for each specific company. For example, you might not want to allow Cash on Delivery for certain businesses — and the module allows you to adjust that.

Simply choose the methods you **don't want** to display on the company's checkout. The payment options that are left unchecked will be displayed on the frontend.



Store Credit

In this block, store admin can manage the Company Store Credits that are allowed for the company to use.



Credit Currency - set the currency in which Store Credits will be counted. Please note that in the dropdown, only Base Currencies will be shown.

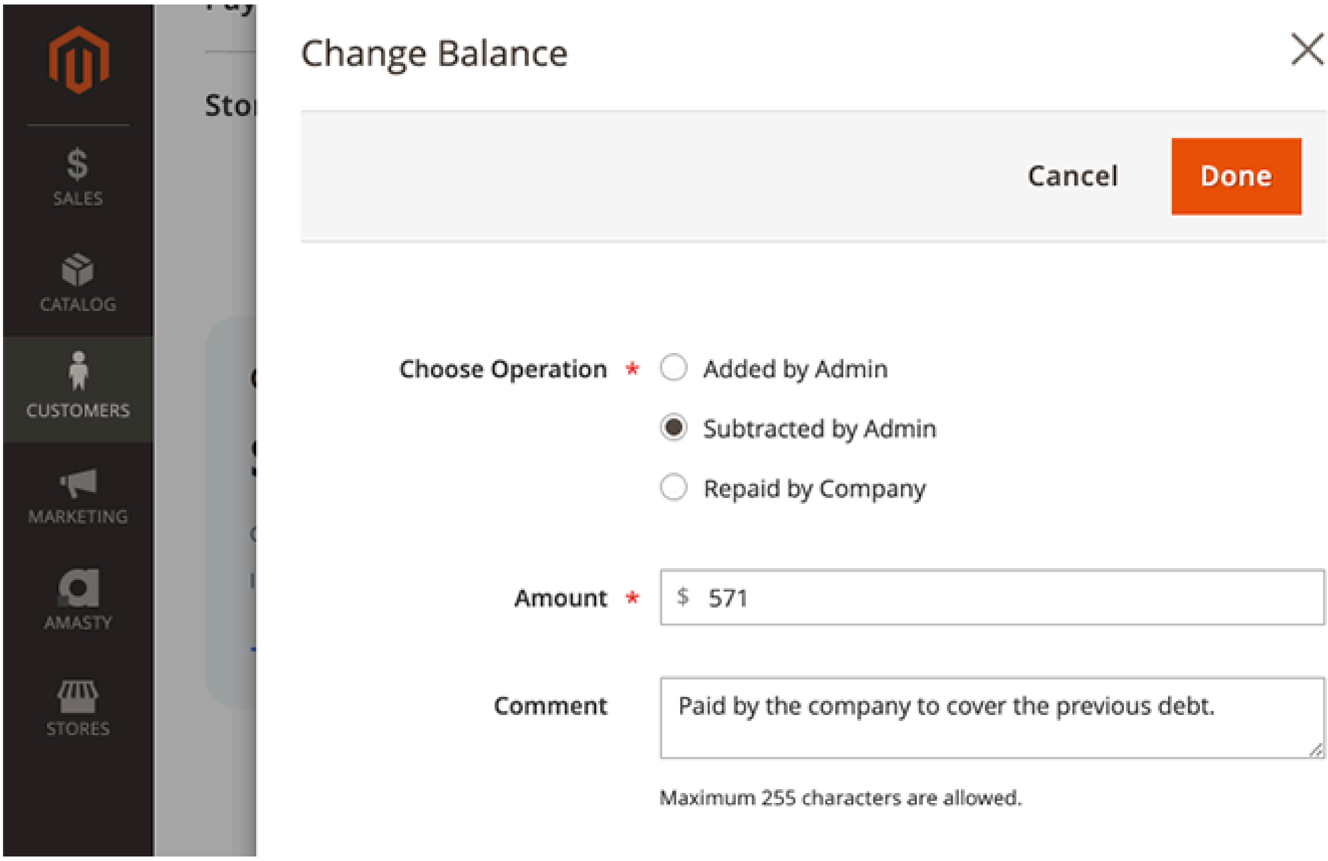
Current Balance - displays the number of store credits that are available for the CompanyName to spend. This card has also an **Issued Credit** information, that provides the admin with data on how much credit admin has issued to this company for all the time. *Issued Credit* is calculated as a sum of *Added and Substracted* credits.

To Be Paid - shows the number of store credits that the CompanyName needs to pay back to your store. In case the *To Be Paid* amount is NEGATIVE, this means that the company pre-paid some money in advance. In this case, the *Current Balance* will be a positive number.

Manage Credits Balance

To add funds to the company's store credits, please click the **+ Change Balance** button in the **Current Balance** block.

Then, a pop-up window will appear as shown on the example screenshot below.



Choose Operation - select the operation type. It impacts the way how the store credit totals will be calculated.

- *Added By Admin* - will add credits to the *Current Balance*. For example, *Added by Admin* can be used in cases like 'Admin and Company agreed that Company is allowed to have $XX money of credits. Company will order goods using store credits and then later will transfer real money to the store.' Admin uses *Added by Admin* operation to set the initial store credits balance.
- *Subtracted by Admin* - will reduce the number of credits on the company's balance.
- *Repaid by the Company* - will add credits to company's balance, BUT the 'To be Paid' amount will be reduced. You can use it in cases when client-company transfers you actual money for orders that were paid via store credits. Also, it can be used in the scenarios when companies agreed to put money on the balance BEFORE buying any goods.

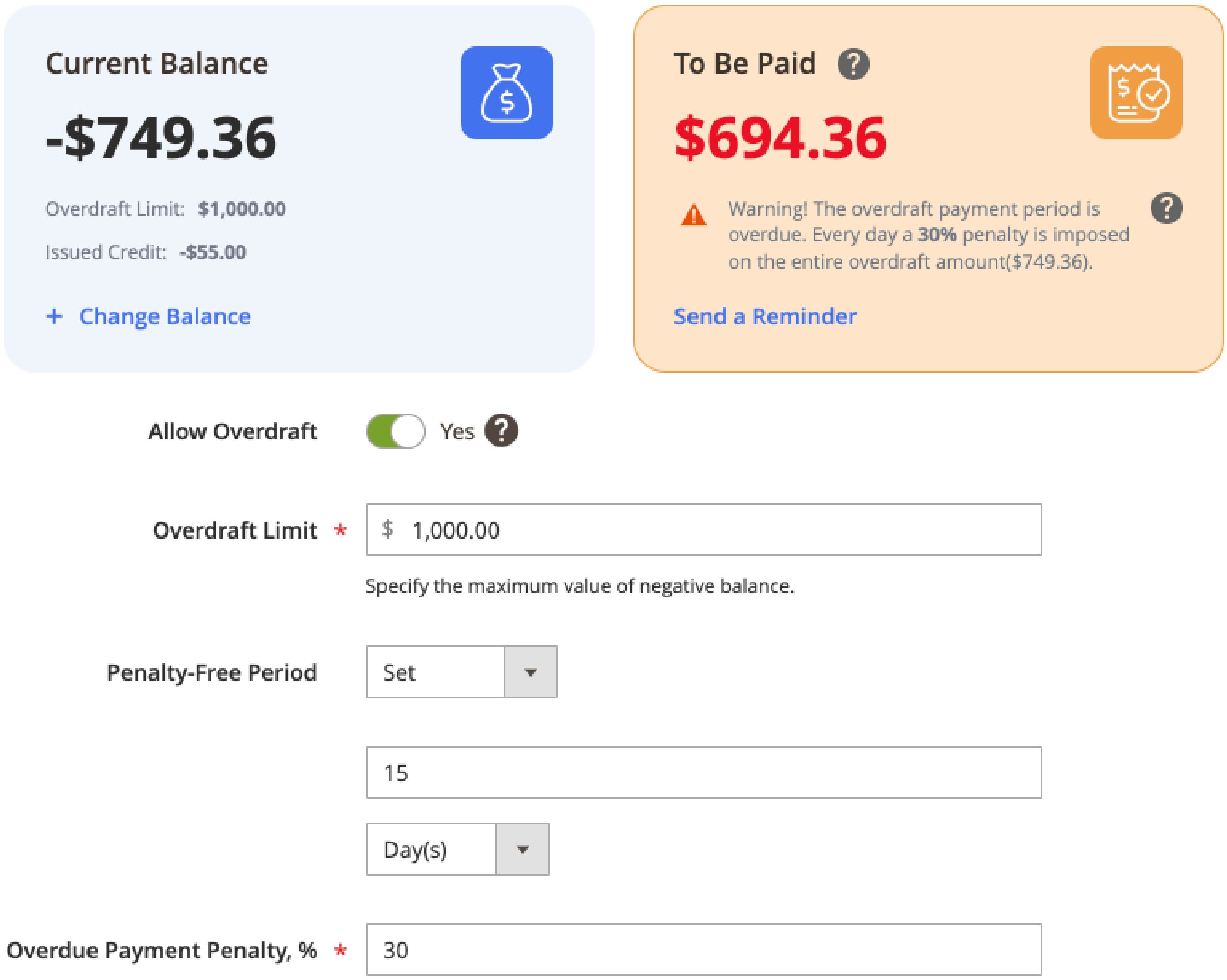
Amount - simply enter the number of store credits that need to be added/subtracted to the balance.

Comment - if needed, you can leave a short comment to mark the transactions' context and easily track them down in the future.

Overdraft for Store Credits

The extension allows to set up an overdraft of store credits. To do this, please set the switcher in the **Allow Overdraft** setting to **Yes**.

Then, more configuration options will appear.



Overdraft Limit - enter the number of store credits a company is allowed to overspend.

Penalty-Free Period - the extension allows charging up a penalty for not paying back the debt in the set timeframe. Select the *Unlimited* to not impose any penalties for using an overdraft.

In case you want to charge penalties, select the *Set* option. Then, configure the time where if a company pays back, it won't be charged a penalty. You can set the period in Days, Weeks, Years.

Overdue Payment Penalty, % - enter the number of how many penalties to charge. This is a percentage of all overdraft amount used.

In case a company is on its **Penalty period**, the extension automatically changes the colour of **To be Paid** block to make it more noticeable and urge companies pay back money faster. Moreover, the extension also allows to send e-mail reminders on debt in the **To be Paid** block in one click — simply click the **+Send a Reminder** button.

Company Account on the frontend

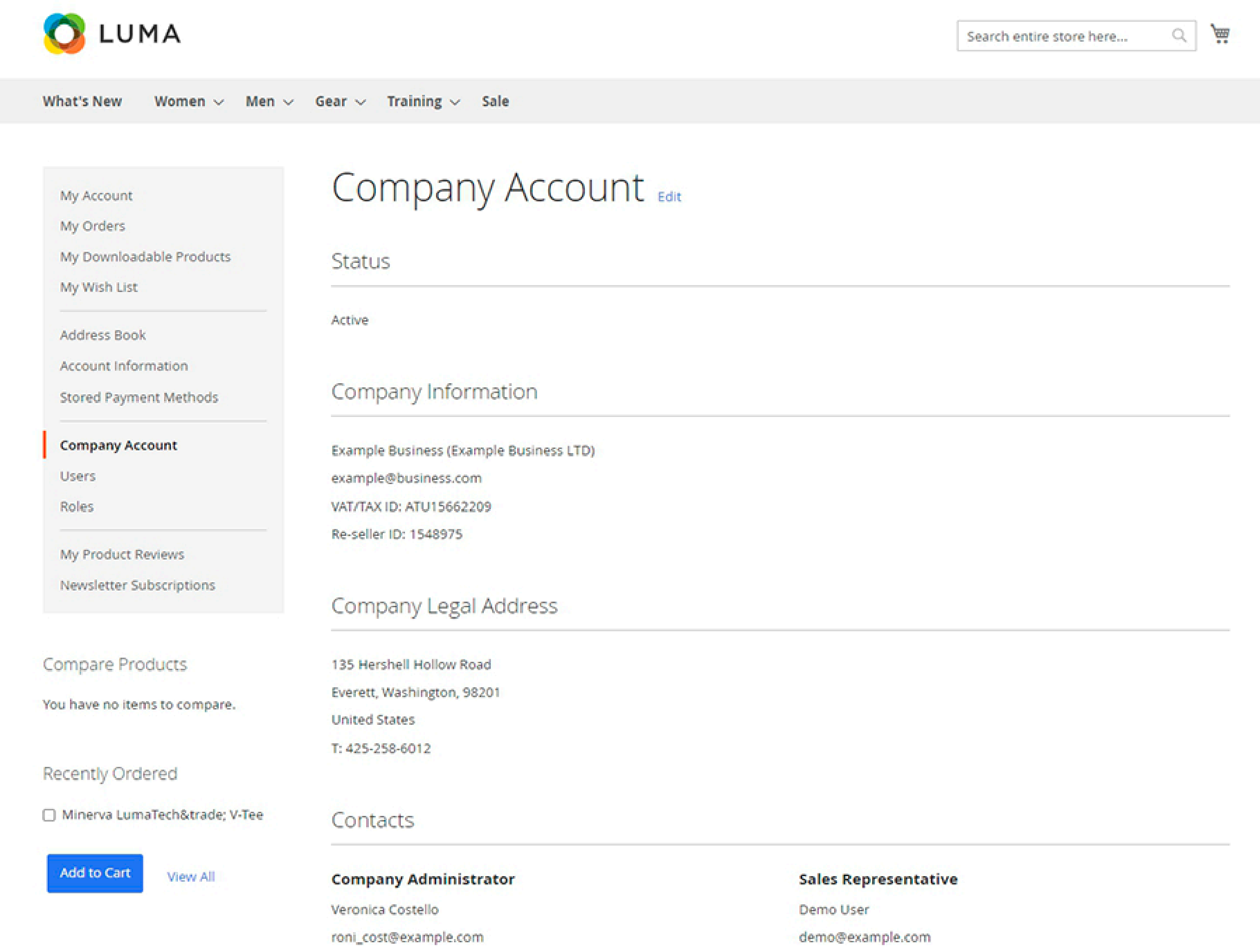
With the **B2B Company Account** extension for Magento 2, company admins can set up different levels of access to company account information.

Check the demo to manage the company account as an admin user or to see the company as a regular employee.

The **company administrator** is the user that created a request for a company account or was assigned as a company admin from the backend by the store admin. The company admin has full access to the company account setting on the frontend.

Company Account

See the way **Company Account** looks on the frontend. A new block with **Company Account**, **Users**, **Roles** is added to the user account navigation left block.

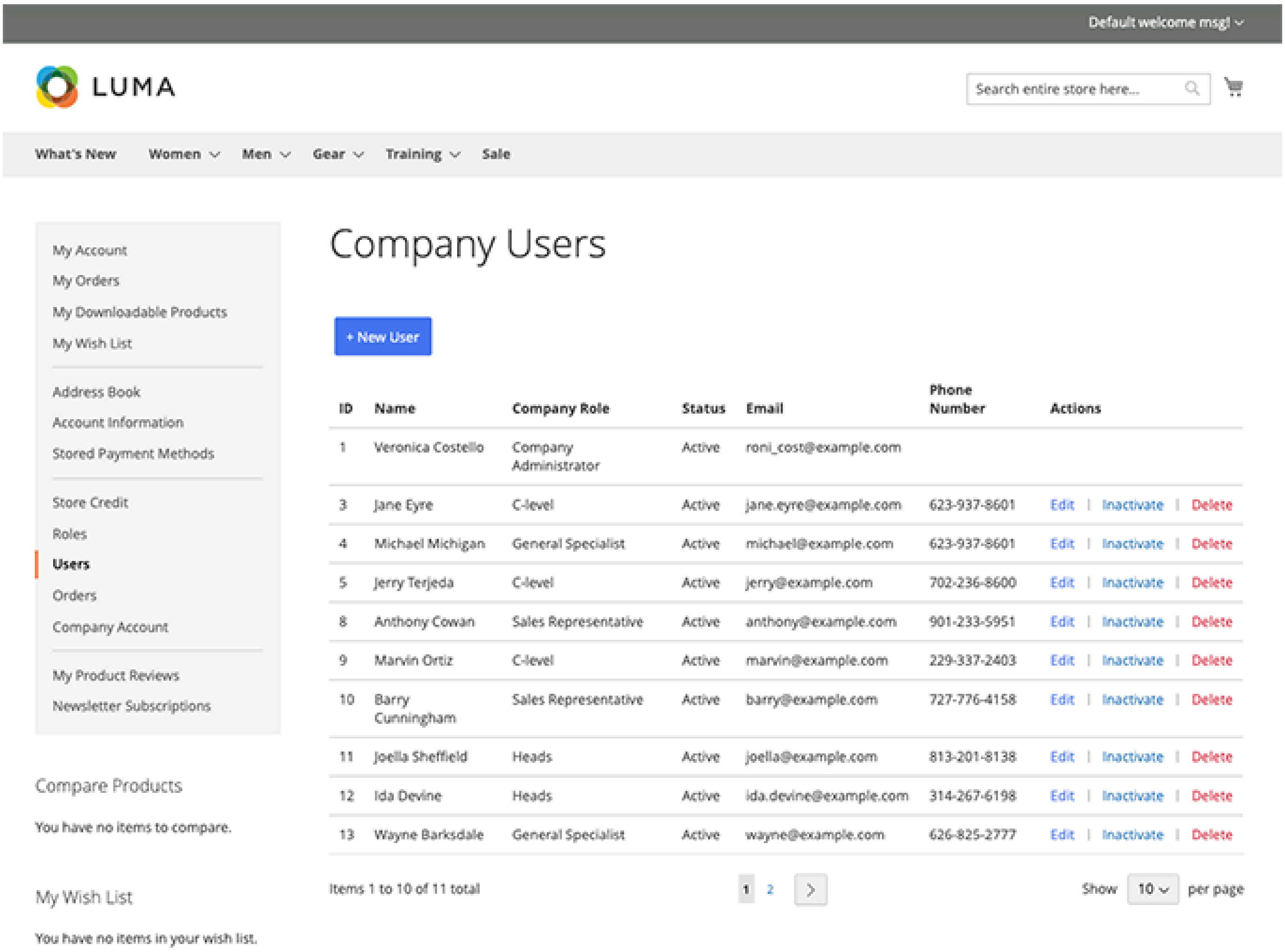


Company Users

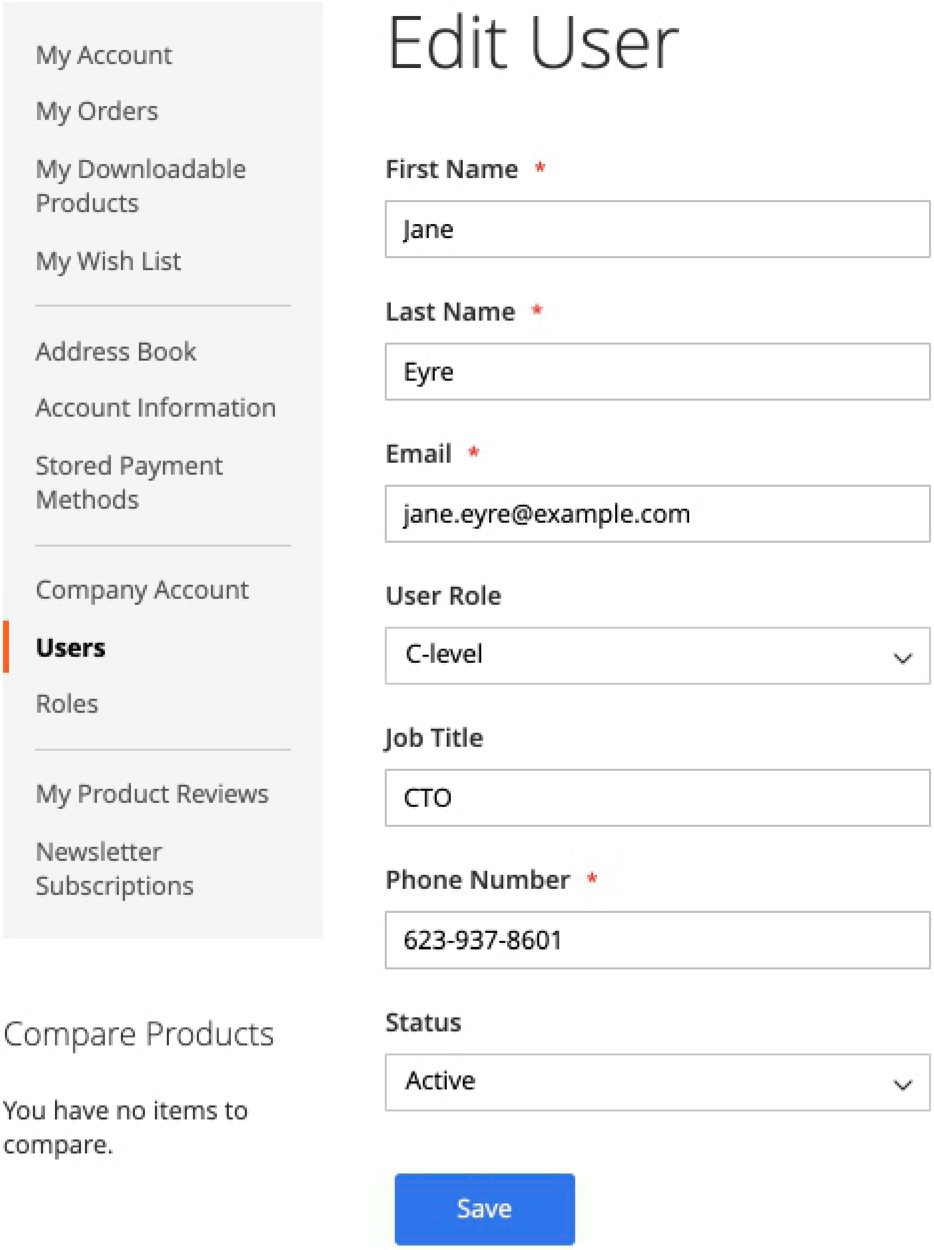
This is the way **Company Users** page looks like. Here, company admin can add users by choosing them from the list of registered store customers. Alternatively, company admin can create new users to add to the company.

Please note that the new user registration is possible only if the new user email **is not** registered/associated with any other customer account.

Also, users can delete, activate, or inactivate other users from the company, if they have user role permissions for such actions.



To manage the user, click the **Edit** button next to the required user name.



Enter the **First Name** and **Last Name**.

Add personal **Email** of the employee.

User Role - choose the user role of an employee to limit access to certain areas of Company Account. To adjust user roles, please go to the **Roles** tab in the **Company Account**.

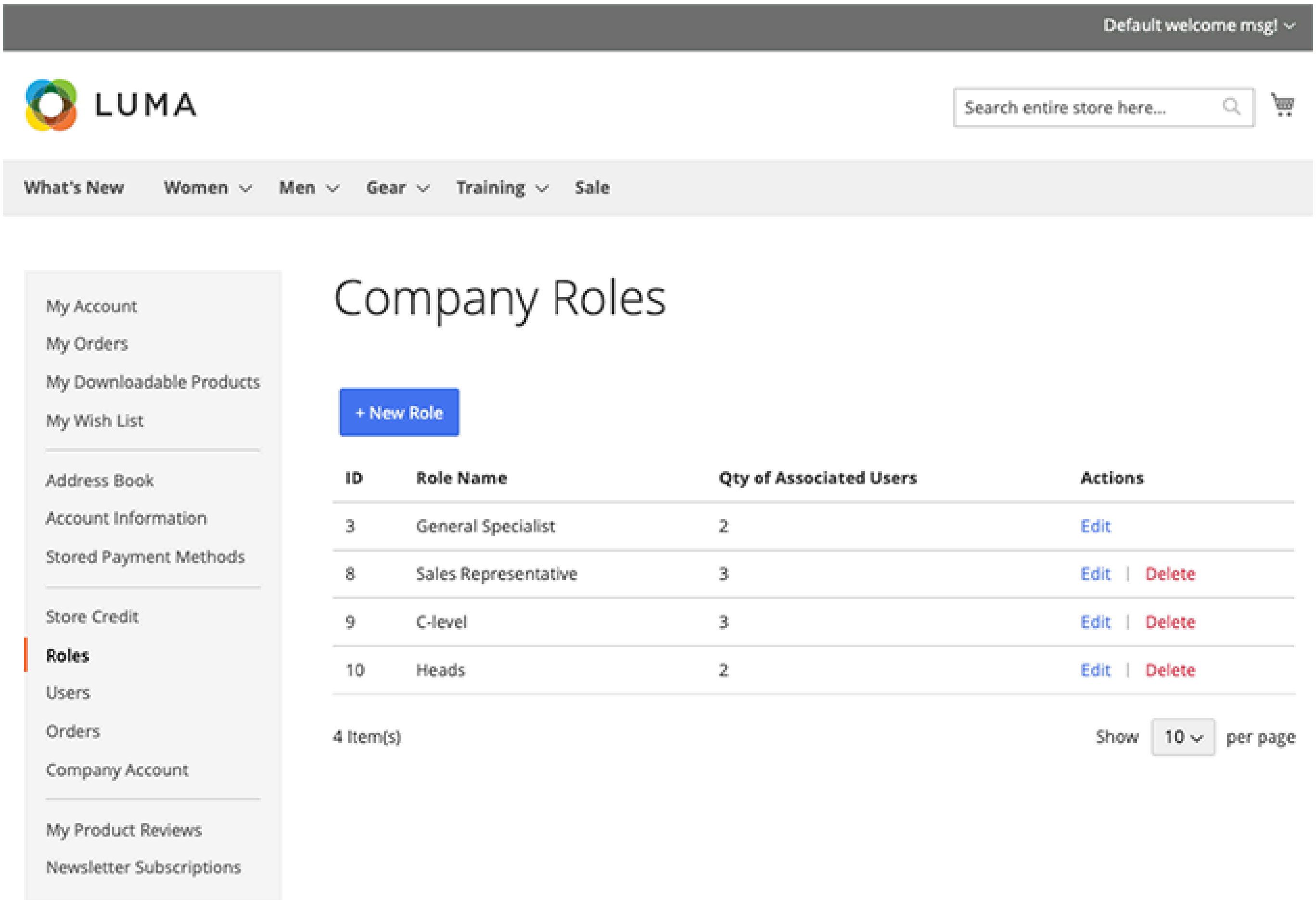
Job Title - enter the job title of the employee.

Phone Number - fill in the contact phone number for the user.

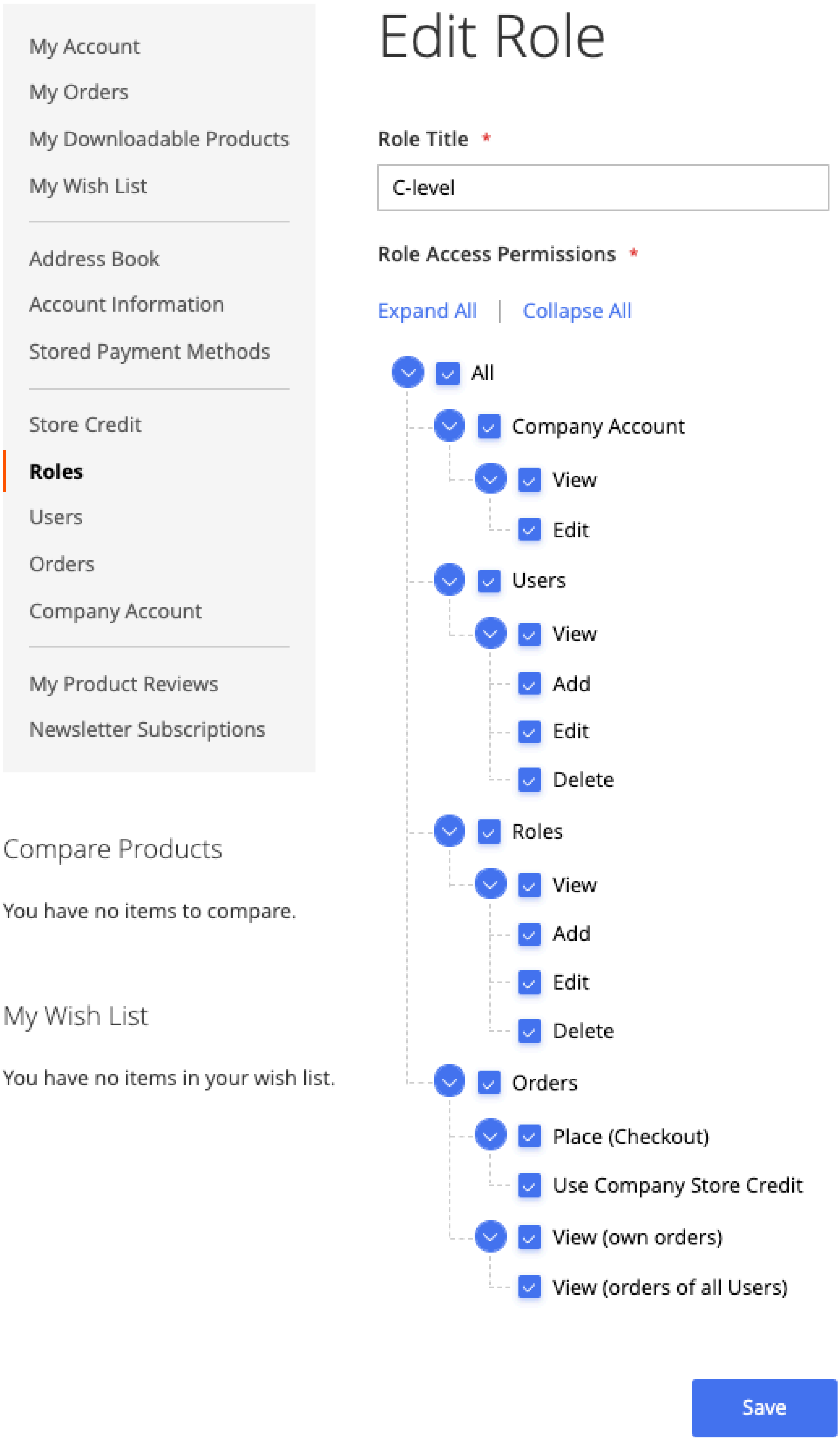
Status - set to *Active* to activate the user.

Company Roles

In the **Company Roles** page, you can adjust the access level for each role.



To add a new role, click the **+ New Role** button.



After that, you'll be asked to specify the **Role Title** - the name of the role that will be visible for all users within the company account.

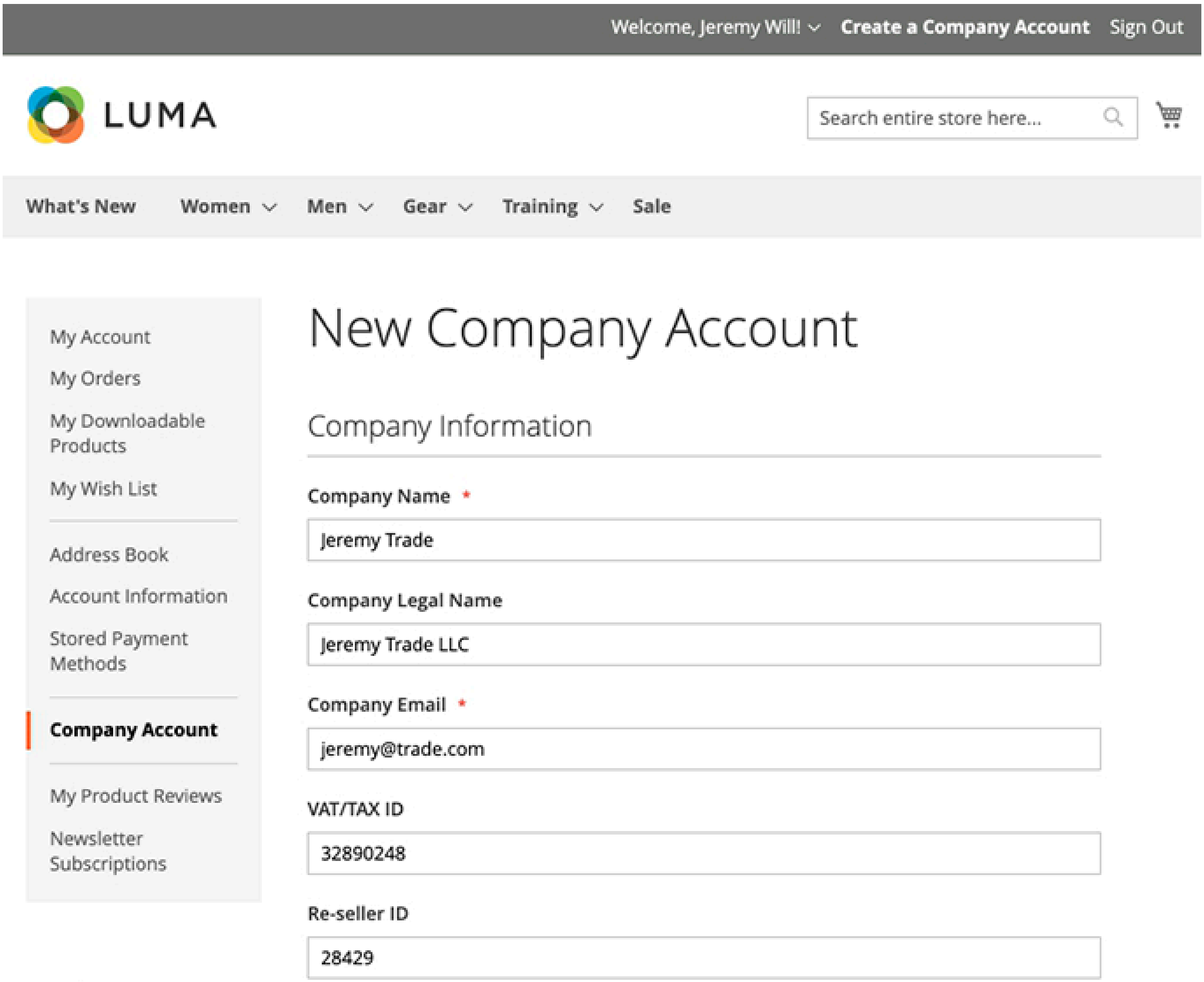
Also, set up the **Role Permission** via the permission tree to allow or restrict access to certain areas or actions for all users that belong to this user role.

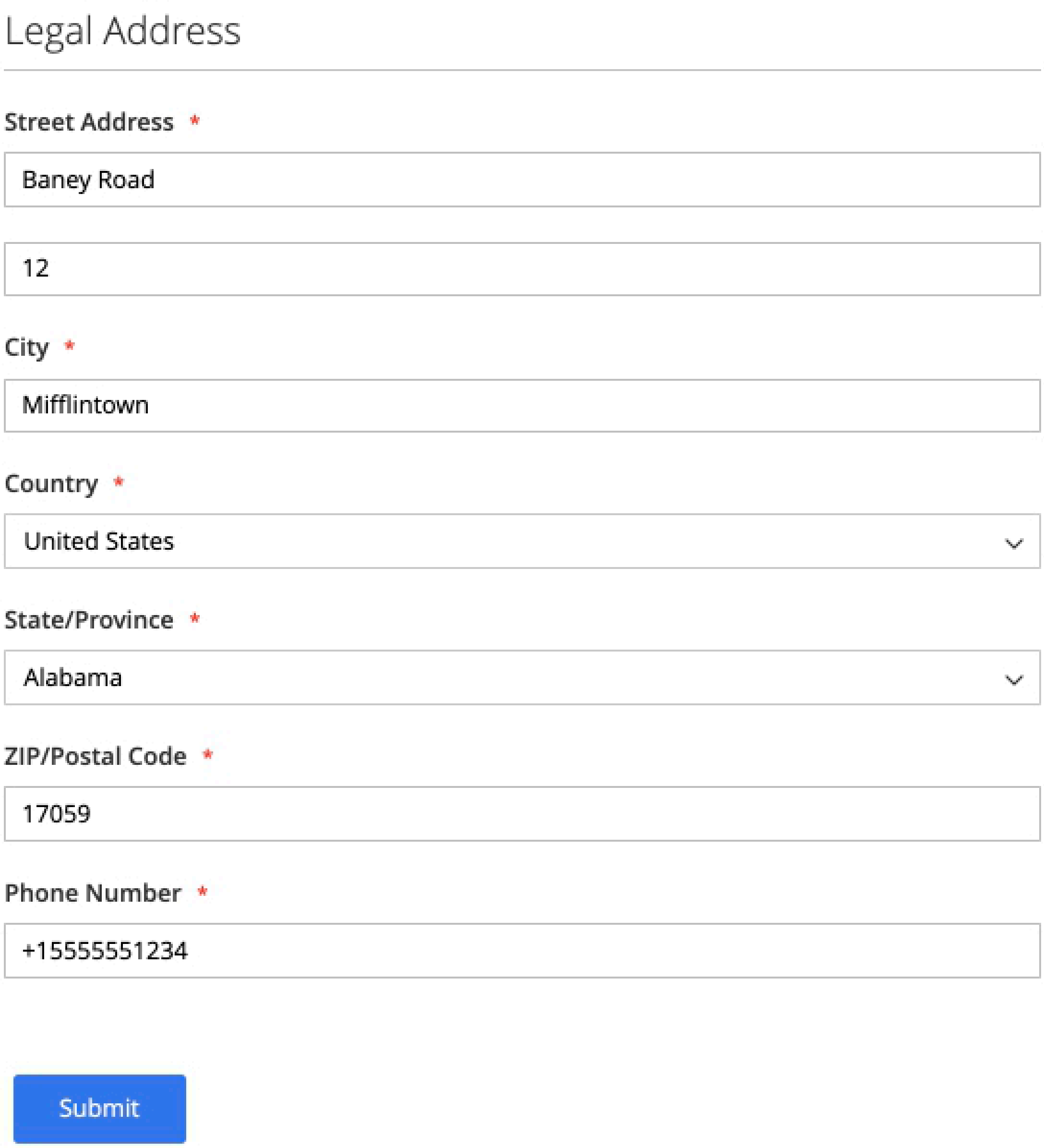
You can restrict the rights to place and view orders within a company. This way, B2B clients can precisely distribute appropriate user permissions and save time and efforts on communication.

Request to create company account from the fronted

If the user belongs to the customer group that is allowed to create requests for a company account, this user will see the **Company Account** section in their customer account.

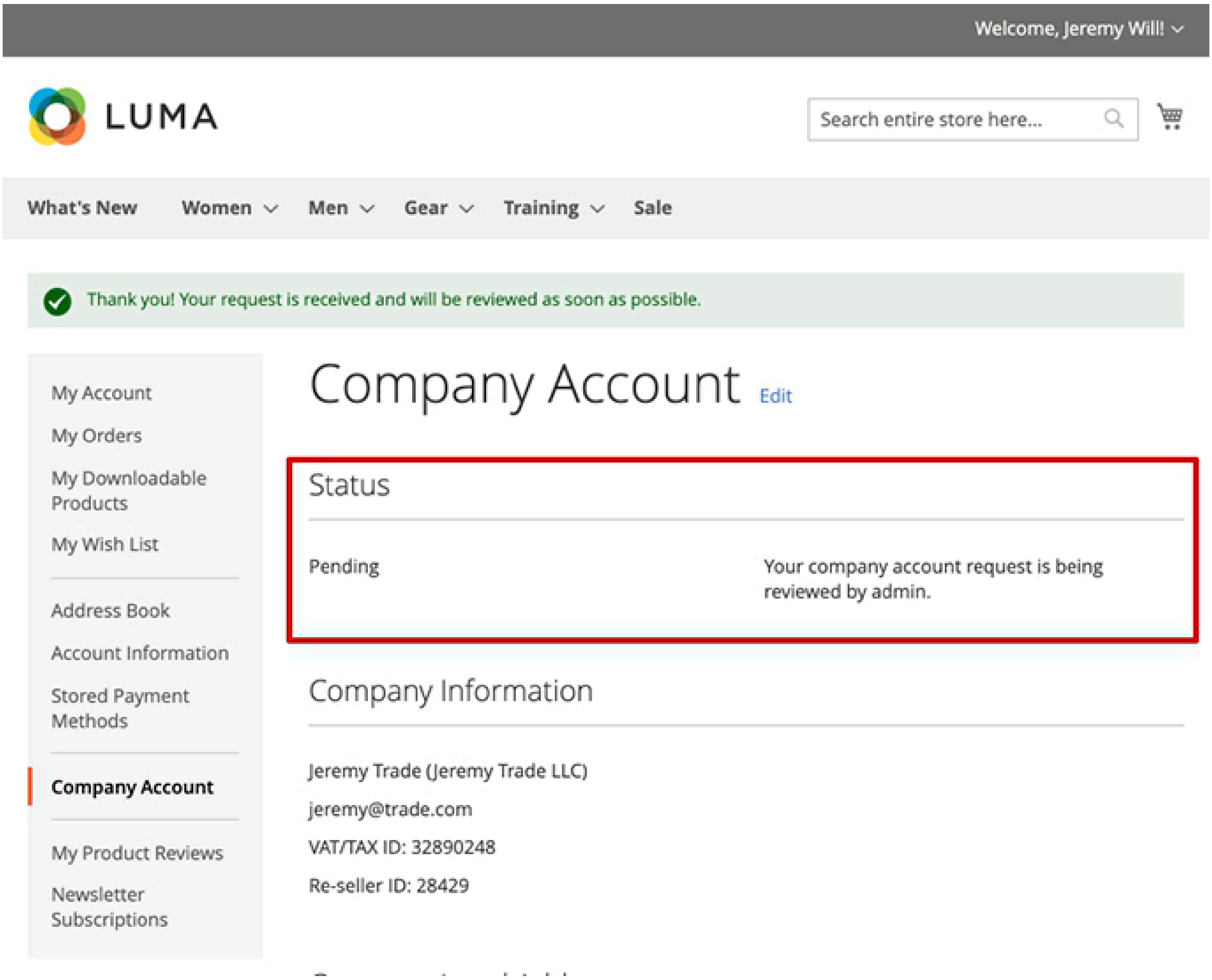
After pressing the **Create** button, the user will be asked to fill in some information on the company, similar to the backend company creation.





After all necessary fields are completed, please click the **Submit** button. Then, the company account request will be sent to the store admin for approval (if in General setting automatic company approval is disabled).

The user will see a success message, and company status will be **Pending** upon admin's approval or reject. Below, see an example of how it looks on the frontend:



Find out how to install the **B2B Company Account** extension for Magento 2 via Composer.