

User Guide

1. Overview

Magento 2 B2B Registration extension allows the admin to create a new registration form by adding more fields for B2B customers into that form. Hence, the admin effectively obtains additional information from wholesale customers before deciding to accept or reject their registration.

2. How Does It Work?

2.1. In the frontend

The admin can include a B2B Registration form besides the default form. This form has additional fields to get to know more about B2B customers.



Search entire store here...



What's New Women Men Gear Training Sale

Create New B2B Customer Account

Personal Information

First Name *

Last Name *

Sign Up for Newsletter

Date of Birth



Tax/VAT number

Gender

Sign-in Information

Email *

Password *

Confirm Password *

Please type the letters below *



Reload captcha

Attention: Captcha is case sensitive.

Address Information

Company

Phone Number *

Street Address *

City *

State/Province *

Please select a region, state or province. v

Zip/Postal Code *

Country *


United States v

[Create an Account](#)

More importantly, the admin can review and approve or reject the B2B registration instead of activating the account automatically, like the default.

- When the users complete the B2B registration form, a pending message is shown.

Customer Login

 Please give us time to verify your account. Thanks for visiting us.

Registered Customers

If you have an account, sign in with your email address.

Email *

Password *

[Sign In](#) [Forgot Your Password?](#)

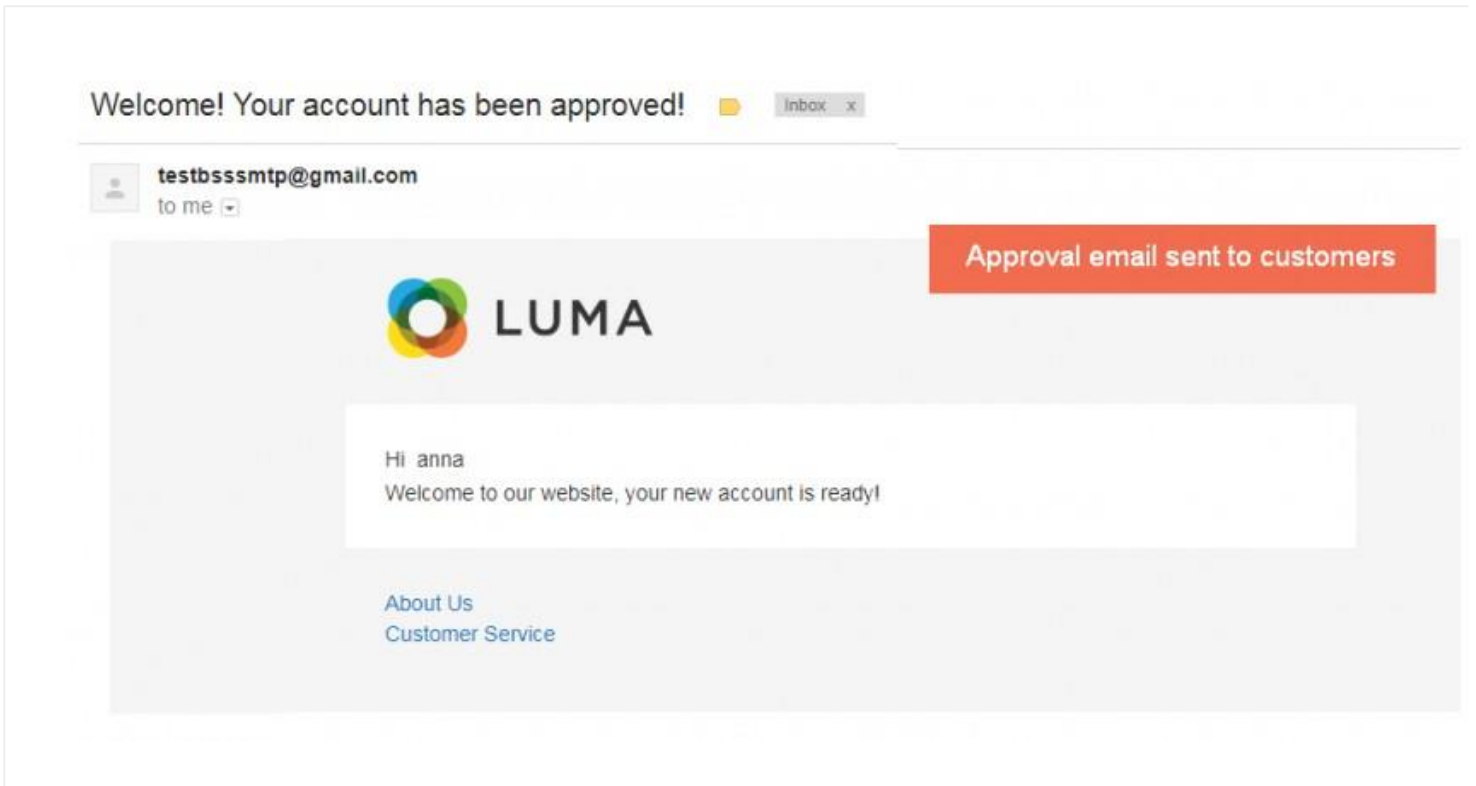
New Customers

Creating an account has many benefits: check out faster, keep more than one address, track orders and more.

[Create an Account](#) [Create B2B Account](#)


An email will be sent to the admin's email to inform of the new B2B registration. Then, admin can manage over that account.

- If the admin approves the registration, an email will be sent to the user's email.



- If the admin rejects the registration, a disapproval email is sent respectively. And, an error message is shown when the users try to access the account in the frontend.

Customer Login

 Something went wrong with your account! Please contact us for more information.

Registered Customers

If you have an account, sign in with your email address.

Email *

Password *



Reload captcha

Sign In

[Forgot Your Password?](#)

New Customers

Creating an account has many benefits: check out faster, keep more than one address, track orders and more.

Create an Account

Create B2B Account

2.2. In the backend

2.2.1. General Configuration

Go through **Stores** ⇒ **Settings** ⇒ **Configuration** ⇒ **BSS Commerce** ⇒ **B2B Registration**.

General Configuration

Enable Module <small>[store view]</small>	Yes	▼
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Version 1.2.1

Register Settings

B2B Account Page Url <small>[store view]</small>	b2b-customer-create.html
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Admin Default: b2b-customer-create, Frontend Default: b2b-customer-create.

Shortcut Link In Header <small>[store view]</small>	Yes	▼
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Shortcut Link Text <small>[store view]</small>	Create B2B Account
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Form Title <small>[store view]</small>	Create New B2B Customer Account
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The Title of B2B Account Page.

- In **Enabled**: choose Yes to enable the module.

2.2.1.1 Register settings

- In **B2B Account Page URL**: enter URL of the customer registration page
- In **Shortcut Link in Header**: select Yes to enable the shortcut link in the header. So customers can click this shortcut link to navigate the registration page.
- In **Shortcut Link Text**: enter the title of the shortcut link in the header.
- In **Form Title**: enter the title of the B2B registration form.

Choose additional fields in the B2B Registration form. If you do not want any fields to show up, choose No.

Add Date of Birth Field <small>[store view]</small>	Yes	▼
Add Tax/VAT Number Field <small>[store view]</small>	Yes	▼
Add Gender Field <small>[store view]</small>	Yes	▼
Add Address Field <small>[store view]</small>	Yes	▼
Add Prefix Field <small>[store view]</small>	No	▼
	The title that goes before name (Mr., Mrs., etc.)	
Add Suffix Field <small>[store view]</small>	No	▼
	The suffix that goes after name (Jr., Sr., etc.)	
Add Middle Field <small>[store view]</small>	No	▼
	Always optional.	

Please ensure that by default, these fields are not required. Go to **Configuration** ⇒ **Customer Configuration** ⇒ **Name and Address Options** to check.

Name and Address Options ⌵

Number of Lines in a Street Address [website]

Valid range: 1-4

Use system value

Show Prefix [website]

The title that goes before name (Mr., Mrs., etc.)

Prefix Dropdown Options [website]

Semicolon (;) separated values.
Put semicolon in the beginning for empty first option.
Leave empty for open text field.

Show Middle Name (initial) [website]

Always optional.

Show Suffix [website]

The suffix that goes after name (Jr., Sr., etc.)

Suffix Dropdown Options [website]

Semicolon (;) separated values.
Put semicolon in the beginning for empty first option.
Leave empty for open text field.

2.2.1.2 Customer groups

Default Customer Group [store view]

Disable Regular Registration [store view]

- In **Default Customer Group**: choose a group that you want to add the customer into.
- In **Disable Regular Registration**: select Yes to disable the standard “Create an Account” link in the header, “Create an Account” button in Sign-in Page, and checkout page.

Choose No to enable both "B2B Registration link" and the default "Create an Account link."

2.2.1.3 Approval settings

Approval Settings

Auto Approve Accounts <small>[store view]</small>	No
	Auto approve accounts when customers register.
Pending Message <small>[store view]</small>	Please give us time to verify your account. Thanks for visiting us.
Disapproval Message <small>[store view]</small>	Something went wrong with your account! Please contact us for more informatio

- In **Auto Approve Accounts**: Choose Yes if you want to accept new B2B accounts automatically or No if you want to approve accounts manually.

NOTE: Even when you approve the B2B registration requests automatically, you can still change their status in the backend.

- In **Pending Message**: enter Pending message.
- In **Disapproval Message**: enter Disapproval message.

2.2.1.4 Admin email settings

Admin Email Settings

Enabled <small>[store view]</small>	Yes
Email Sender <small>[store view]</small>	General Contact
Email Templates <small>[store view]</small>	Admin Email Template (Default)
	Email template chosen based on theme fallback when "Default" option is selected.
Recipients <small>[store view]</small>	testmagento321@gmail.com,humorgodfather9x02@gmail.com
	Email recipients, separated by commas.

- In **Enabled**: choose Yes to enable configurations below.
- In **Email Sender**: enter the name of the sender from Store Email Address of the default.
- In **Email Templates**: choose among available email templates of websites to notify the admin of new B2B accounts.
- In **Recipients**: enter emails, separated by commas, to receive notification about new accounts created.

2.2.1.5 Customer email settings

Customer Email Setting

Enabled
[store view]

Yes

Email Sender
[store view]

General Contact

Approval Email Templates
[store view]

Approve Email Template (Default)

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

Disapproval Email Templates
[store view]

Disapprove Email Template (Default)

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

- In **Enabled**: choose Yes to send notification emails to customer
- In **Email Sender**: enter the name of the sender from Store Email Address of the default.
- In **Approval Email Templates**: select among available email templates of your site to send an email after the admin approves the B2B registration
- In **Disapproval Email Templates**: select among available email templates of your website to send an email after the admin rejects the B2B registration

2.2.2. Default CAPTCHA support

To enable Captcha in the B2B Registration form, please follow **Stores ⇒ Configurations ⇒ CUSTOMERS ⇒ Customer Configuration ⇒ CAPTCHA**

CAPTCHA



Enable CAPTCHA on Storefront <small>[website]</small>	<input type="text" value="Yes"/>	<input checked="" type="checkbox"/> Use system value
Font <small>[website]</small>	<input type="text" value="LinLibertine"/>	<input checked="" type="checkbox"/> Use system value
Forms <small>[website]</small>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Create user</p> <p style="background-color: #f0f0f0;">Login</p> <p>Forgot password</p> <p>Check Out as Guest</p> <p>Register during Checkout</p> <p>Contact Us</p> <p>Change password</p> </div>	<input checked="" type="checkbox"/> Use system value
CAPTCHA for "Create user" and "Forgot password" forms is always enabled if chosen.		
Displaying Mode <small>[website]</small>	<input type="text" value="After number of attempts to login"/>	<input checked="" type="checkbox"/> Use system value
Number of Unsuccessful Attempts to Login <small>[website]</small>	<input type="text" value="3"/>	<input checked="" type="checkbox"/> Use system value
<small>If 0 is specified, CAPTCHA on the Login form will be always available.</small>		
CAPTCHA Timeout (minutes) <small>[website]</small>	<input type="text" value="7"/>	<input checked="" type="checkbox"/> Use system value
Number of Symbols <small>[website]</small>	<input type="text" value="4-5"/>	<input checked="" type="checkbox"/> Use system value
<small>Please specify 8 symbols at the most. Range allowed (e.g. 3-5)</small>		
Symbols Used in CAPTCHA <small>[website]</small>	<input type="text" value="ABCDEFGHIJKLMNOPQRSTUVWXYZ23456789"/>	<input checked="" type="checkbox"/> Use system value
<small>Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed. Similar looking characters (e.g. "i", "l", "1") decrease chance of correct recognition by custom</small>		
Case Sensitive <small>[website]</small>	<input type="text" value="No"/>	<input checked="" type="checkbox"/> Use system value

- Set **Enable CAPTCHA on Storefront** to *Yes*.
- In **Form**, choose *Create User* form to enable the CAPTCHA
- Set Display Mode to either **Always** to **After number of attempts to login**.
- Define CAPTCHA settings.

2.2.3 Manage B2B registration requests

In Customer Grid:

There is an additional **Status** column in **Customer Grid** in the backend so that the admin can check the status of B2B accounts and make adjustments accordingly.

The admin can edit the status of single B2B account by double-clicking in any position in the row:

<input type="checkbox"/>	Name	Email	Group	Country	State/Province	Customer Since	Web Site	Tax VAT Number	Gender	Action	Status
<input type="checkbox"/>	Veronica Costello	roni_cost@example.com	General	United States	Michigan	Jan 8, 2018 10:25:27 AM	Main Website		Female	Edit	Normal Account
<input checked="" type="checkbox"/>	test test	test123@gmail.com	Who	United States	District of Columbia	Jan 8, 2018 10:45:40 AM	Mair		Male		B2B Pending
<input type="checkbox"/>	test1234 test	testa1234@gmail.com	Wholesale	United States			Main Website			Edit	B2B Approval
<input type="checkbox"/>	asf afag	stefanbss123@gmail.com	Wholesale	United Kingdom		Jan 8, 2018 2:35:28 PM	Main Website	124124	Female	Edit	B2B Approval

or, multiple B2B accounts:

Search by keyword <input type="text"/>		Filters	Default View	Columns	Export			
6 records found (3 selected)		20	per page	1	of 1			
Actions	Group	Phone	Country	Account Created in	Date of Birth	Tax VAT Number	Action	Status
<input type="checkbox"/>	st@example.com	(555) 229-3326	United States	Default Store View	Dec 15, 1973		Edit	Normal Account
<input type="checkbox"/>	@gmail.com	123456789	United States	Default Store View	Jan 3, 2018		Edit	B2B Pending
<input type="checkbox"/>	34@gmail.com	091837434	United States	Default Store View	Jan 6, 1982		Edit	B2B Pending
<input type="checkbox"/>	4 asf arag	steranbss123@gmail.com	Wholesale	Default Store View	Jan 6, 1914	124124	Edit	B2B Approval
<input type="checkbox"/>	5 grh whw	haianhntbss@gmail.com	Wholesale	Default Store View	Jan 13, 1999		Edit	B2B Rejec
<input checked="" type="checkbox"/>	6 afj mva	haianhnt0418@gmail.com	Wholesale	Default Store View	Jan 12, 1994		Edit	B2B Pending

or in **Account Information** of specific account:

Veronica Costello

Force Sign-In

Save and Continue Edit

Save Customer

CUSTOMER INFORMATION

Account Information

Customer View

Account Information 

Addresses

Orders

Newsletter

Billing Agreements

Product Reviews

Wish List

Associate to Website * Main Website 

Group * Wholesale

 Disable Automatic Group Change Based on VAT ID

First Name * Veronica Costello

Email * roni_cost@example.com

Date of Birth 12/15/1973 

Tax/VAT Number

Gender Female

Send Welcome Email From Default Store View

Status

Normal Account

Normal Account

B2B Pending

B2B Approval

B2B Reject

Vertex Customer Code

***Note:**

If the admin creates an account in the backend for a customer, there will be an approval notification email sent to the customer after finish creating this account.

However, that account has Normal status; admin can change into B2B Approval status, then there will also be a notification email sent to that customer.

Updated on August 5, 2020