

# User Guide

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## 1. Overview

[Magento 2 B2B Company Credit \(https://bsscommerce.com/magento-2-b2b-company-credit.html\)](https://bsscommerce.com/magento-2-b2b-company-credit.html) supports using Magento 2 purchase order payment method, setting credit limit for credit purchases, and maximizing interactions between customers and admins.

Make good use of the default Magento 2 purchase order functionality now and attract your wholesaler customers with credit sales!

>> **EXPLORE All [Magento 2 B2B Features \(https://bsscommerce.com/magento-2-b2b-extensions-package.html\)](https://bsscommerce.com/magento-2-b2b-extensions-package.html) to Boost Sales from Wholesale Customers Now!**

## 2. How Does It Work?

### 2.1. General Configs

Please Go to **Admin ⇒ Stores ⇒ Configuration ⇒ BSSCommerce ⇒ Company Credit.**

## General

Enabled  
[website]

Yes

Version 1.0.0.  
Enabled Payment Method Purchase Order required (to use Company Credit extension)

## Email Configuration

Email sender  
[store view]

General Contact

Email Receiver  
[store view]

General Contact

Email Template - Admin Updates Credit Value  
[store view]

Email Template - Admin Updates Credit Value (Default)

Email Template - Admin Changes Credit Limit  
[store view]

Email Template - Admin Changes Credit Limit (Default)

Email Template - Customer Exceeds Available Limit  
[store view]

Email Template - Customer Exceeds Available Limit (Default)

In **Enabled**: Choose Yes to enable the extension.

\* Note: You need to go to **Admin** ⇒ **Stores** ⇒ **Configuration** ⇒ **Sales** ⇒ **Payment Methods** ⇒ **Purchase Order** to enable the Purchase Order Payment Method.

In Email Config, choose the sender and templates.

## 2.2. Credit Limit Configuration

\* **Note**: In the **Comment** section, you can add some notes for any update in the credit limit configuration, whether you change credit limit, update available credit, or enable/disable credit excess for the customer.

### 2.2.1. Assign A Credit Limit for Customers

To assign a credit limit for customers, you can **either** go to the Customer Detail Page **or** configure right on Customer Grid.

**1st way - In Customer Detail Page**: Choose tab “Company Credit”: You can assign a credit limit for the customer and choose to allow him/her to exceed the available credit or not.

### Credit Limit Information

Credit Limit	Used Credit	Available Credit	Allow Excess
\$10,000.00	\$2,247.50	\$7,752.50	Yes

### Credit Limit Configuration

Credit Limit

Warning: Only make change when really needed. You must assign the customer a credit limit before making changes to the below fields.

Update Available Credit


Add prefix "-" to subtract.





Comment


Allow Available Credit Excess

After you have set the values, hit “Save Customer”.

**2nd way - In Customer Grid:** Choose the customers that you wish to assign a unanimous credit limit:

Search by keyword  

 Filters  Default View  Columns  Export

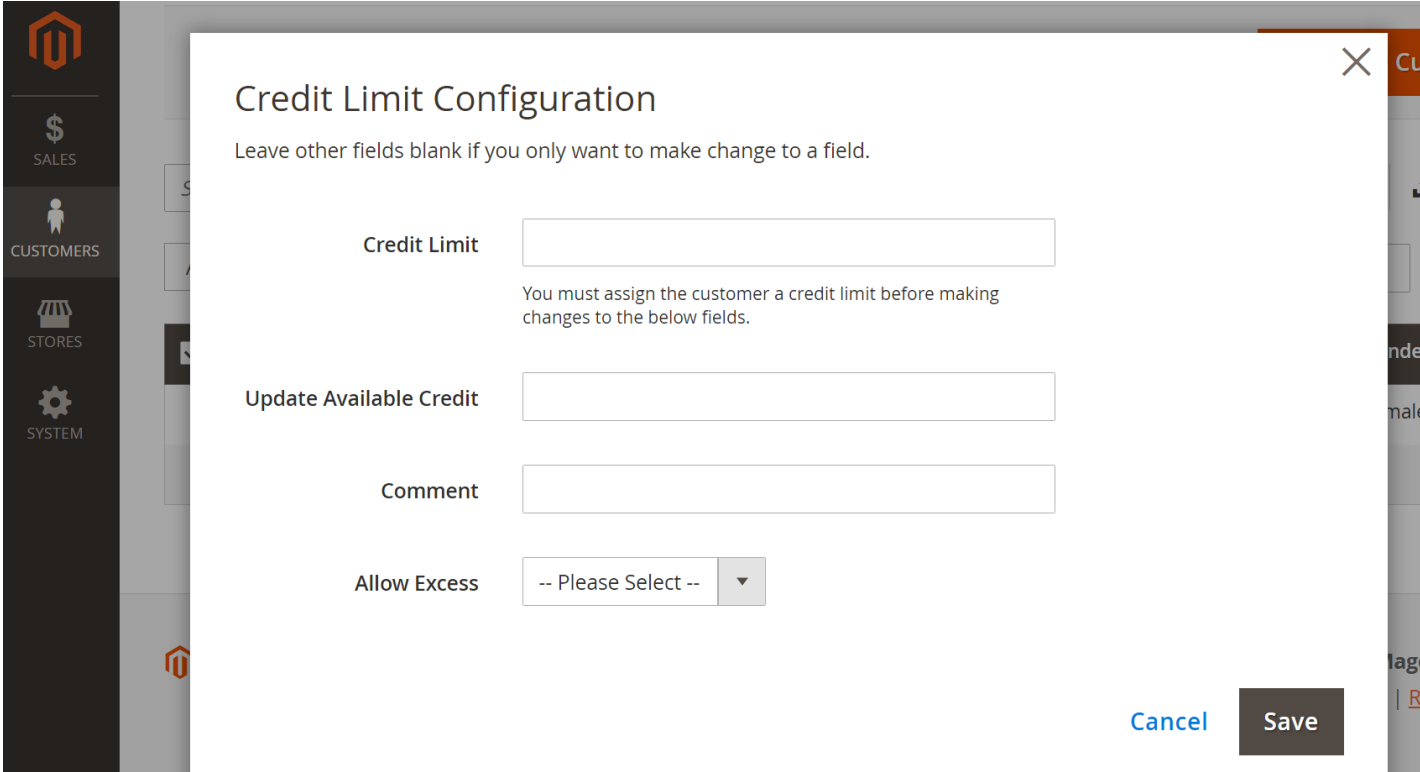
Actions  2 records found (2 selected) 20 per page < 1 of 1 >

Name	Email	Group	Allow Excess	Available Credit	Gender	Action
Veronica Costello	roni_cost@example.com	Wholesale	Yes	\$7,752.50	Female	<a href="#">Edit</a>
James Bond	jamesbond@gmail.com	General				<a href="#">Edit</a>

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[Privacy Policy](#) | [Account Activity](#) | [Report an Issue](#)

- Delete
- Subscribe to Newsletter
- Unsubscribe from Newsletter
- Assign a Customer Group
- Edit
- Update Company Credit**

After clicking “Update Company Credit”, you can assign a credit limit and allow credit access just like in the first way:



**Credit Limit Configuration**


Leave other fields blank if you only want to make change to a field.

**Credit Limit**

You must assign the customer a credit limit before making changes to the below fields.

**Update Available Credit**

**Comment**

**Allow Excess** -- Please Select -- 

[Cancel](#) [Save](#)

### 2.2.2. Update Customers’ Available Credit

There is only one event that affects the customer’s available credit without the admin’s interference, that is when the customer places an order.

To update the customer's available credit, that is, the credit left after the customer has placed order(s), you can enter a value in the "Update Available Credit" field, either in the **Customer Detail Page** or **Customer Grid Action**.

The value you entered will be added to the current available credit.

\* Note:

- You cannot add an amount to the available credit that makes it greater than the credit limit.
- Please add the prefix "-" if you want to subtract the customer's available credit.

### 2.2.3. Change Customer's Credit Limit

Sometimes while working with customers, you may wish to increase or decrease their credit limit. To do so, you can directly enter a value in the credit limit field.

The updated credit limit will be the value you have just entered, not an added value to the former limit.

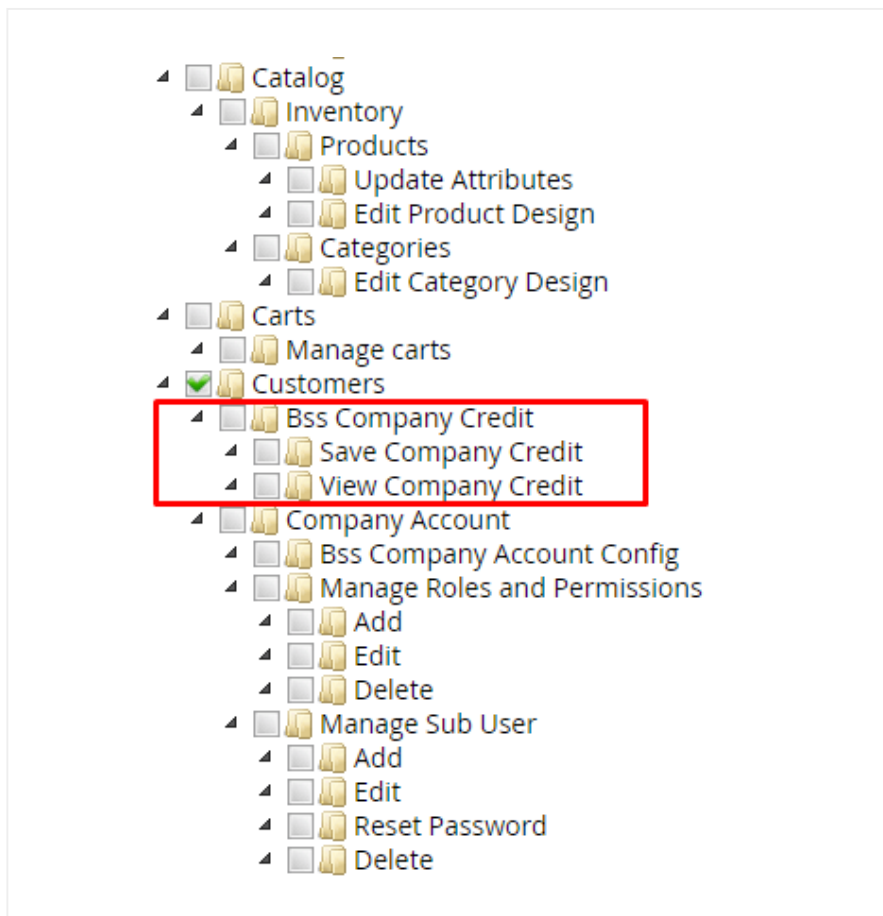
## 2.3. Configure Admin Actions to Company Credit

If you do not want all admin users to be able to view or change the company credit info of customers, then you can configure the setting in Role Resources.

- *No tick on View or Save Company Credit:*

- Admin users cannot see Allow Exceed & Available Credit info in the customer grid.

- Admin users cannot see the Company Credit tab on the customer detail page, therefore unable to update or create company credit.



- *Only tick on View Company Credit:*

- Admin users cannot save company credit on the customer detail page.

- Admin users receive the notification “Sorry, you need permissions to save company credit” when trying to change credit info.

- In Mass Actions, admin users still see the “Update Company Credit” option but will be redirected to the permission page when hitting “Save” credit.

- *Tick on both View and Save Company Credit:* Admin users can both see and edit company credit of customers that he/she has access to.

### 3. In the Frontend

After you have assigned the customer a credit limit, he can see it in **My Account** → **My Company Credit**. Available Credit and Credit Excess info are also displayed in the Company Credit Information section.

Company Credit			
Company Credit Information			
Credit Limit	Used Credit	Available Credit	Allow Excess
\$10,000.00	\$2,247.50	\$7,752.50	Yes

For each action affecting the credit information, the customer can track them in the Log Transaction:

## Log Transaction

4 Item(s)

Show  per page

ID	Update At	Type	Credit Change	Available Credit	Comment	PO Number	Order ID	Action
4	Jan 25, 2021, 3:23:06 AM	Update Available Credit	\$1,000.00	\$7,752.50	Pay a part of 12345 order			
3	Jan 25, 2021, 3:21:44 AM	Place order	-\$3,247.50	\$6,752.50		12345	3	<a href="#">Order # 00000003</a>
2	Jan 25, 2021, 2:57:44 AM	Enable Credit Excess	\$0.00	\$10,000.00				
1	Jan 25, 2021, 2:57:44 AM	Change Credit Limit	\$10,000.00	\$10,000.00				

4 Item(s)

Show  per page

The customer can use his available credit to checkout, even for a sum larger than his available credit, if he is allowed to exceed it:

### Payment Method

Check / Money order

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Purchase Order Available Credit \$7,752.50

My billing and shipping address are the same

Veronica Costello  
 6146 Honey Bluff Parkway  
 Calder, Michigan 49628-7978  
 United States  
[\(555\) 229-3326](#)

Purchase Order Number \*

### Order Summary

Cart Subtotal	\$11,500
Discount	-\$2,300
Shipping Best Way - Table Rate	\$0
Tax	\$759
<b>Order Total</b>	<b><span style="border: 1px solid red; padding: 2px;">\$9,959.</span></b>

400 Items in Cart

**Do you want to exceed your available credit?**

Yes  No

[Place Order](#)

### Ship To:

Veronica Costello  
 6146 Honey Bluff Parkway  
 Calder, Michigan 49628-7978  
 United States

\* Note: This module does not support checkout with multiple addresses

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