

# B2B Registration Form for Magento 2

## User Guide



### Table of Content

1. [Extension Installation Guide](#)
2. [Configuration](#)
3. [Registration Settings](#)
4. [Approval Settings](#)
5. [Admin Email Notification Settings](#)
6. [Customer Email Notification Settings](#)
7. [Google reCAPTCHA Settings](#)
8. [B2B Registration Form in Frontend](#)
9. [B2B Registration Details in Backend](#)
10. [B2B Registration Approval Email to Customers](#)

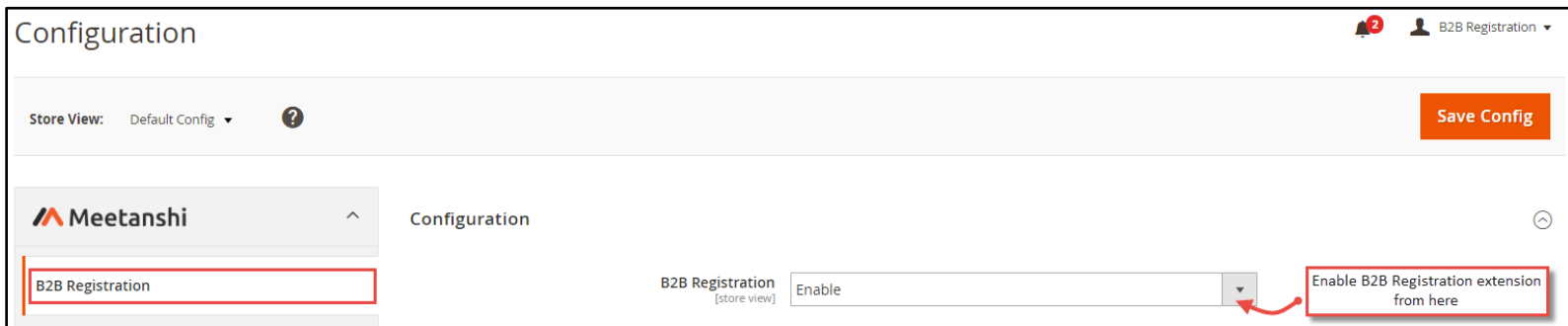
## 1. Extension Installation

- Create a folder structure in Magento root as app/code/Meetanshi/B2BRegistration
- Download and extract the zip folder and upload our extension files to the app/code/Meetanshi/B2BRegistration via FTP.
- Login to your SSH and run below commands step by step:
  - php bin/magento setup:upgrade
  - For Magento version 2.0.x to 2.1.x - php bin/magento setup:static-content:deploy
  - For Magento version 2.2.x & above - php bin/magento setup:static-content:deploy -f
  - php bin/magento cache:flush

## 2. Configuration

For configuring the extension, log in to Magento 2, move to **Stores → Configuration → B2B Registration Form** where you can find various settings to enable the extension.

- **B2B Registration Form:** Enable or disable B2B Registration Form extension from here.



Configuration

Store View: Default Config ?

Save Config

Meetanshi Configuration

B2B Registration

B2B Registration [store view] Enable

Enable B2B Registration extension from here

### 3. Registration Settings

Here, you can find various settings for the registration form.

- **Registration Form URL Key:** Enter registration form URL key for the registration form page.
- **Enable Top Link in Header:** Select YES to enable top link in header.
- **Top Link URL Anchor Text:** Set anchor text for the registration form URL in the top link.
- **Registration Form Title:** Enter B2B registration form title.
- **Add Name Prefix in Form:** Select YES to add name prefix field in the form.
- **Name Prefix Dropdown Options:** Add semicolon separated name prefixes to show in the form.
- **Add Middle Name in Form:** Select YES to add middle name field in the form.
- **Add Name Suffix in Form:** Select YES to add name suffix field in the form.
- **Name Suffix Dropdown Options:** Add semicolon separated name suffixes to show in the form.
- **Add Other Form Fields:** Select other form fields to show in the registration form.
- **Assign Customer Group:** Select customer group to assign to new approved B2B customers.
- **Disable Default Registration:** Select YES to disable Magento 2 default registration.

## Registration Settings

**Registration Form URL Key** [store view]  Enter URL key for the registration form page  
 Frontend Default: b2b-customer-create

**Enable Top Link in Header** [store view]  Set YES to show registration form URL in top link

**Top Link URL Anchor Text** [store view]  Add anchor text from the registration form link

**Registration Form Title** [store view]  Enter registration form title  
 The Title of B2B Account Page.

**Add Name Prefix in Form** [store view]  Select YES to add name prefix field in the form  
 The title that goes before name (Mr., Mrs., etc.)

**Name Prefix Dropdown Options** [store view]  Enter semicolon separated name prefixes to show in dropdown  
 Semicolon (;) separated values.  
 Put semicolon in the beginning for empty first option.  
 Leave empty for open text field.

**Add Middle Name in Form** [store view]  Select YES to add middle name field in the form  
 Always optional.

**Add Name Suffix in Form** [store view]  Select YES to add name suffix field in the form  
 The suffix that goes after name (Jr., Sr., etc.)

**Name Suffix Dropdown Options** [store view]  Enter semicolon separated name suffixes to show in dropdown  
 Semicolon (;) separated values.  
 Put semicolon in the beginning for empty first option.  
 Leave empty for open text field.

**Add Other Form Fields** [store view]

Date of Birth  
 Tax/VAT Number  
 Gender  
 Address

Select to show additional fields in the registration form

**Assign Customer Group** [store view]  Select customer group to auto assign to the approved

**Disable Default Registration** [store view]  Set YES to disable default Magento 2 registration

#### 4. Approval Settings

You can either enable auto approval of B2B registrations or manually approve them from backend by setting here.

- **Auto Approve Registrations:** Select YES to auto approve B2B registrations.
- **Form Submission Success Message:** If the auto approval is set to NO, add form submission success message to show in the frontend.
- **Form Submission Failure Message:** If the auto approval is set to NO, add form submission failure message to show in the frontend.

#### Approval Settings

<b>Auto Approve Registrations</b> <small>[store view]</small>	<input type="text" value="Yes"/>	<div style="border: 1px solid red; padding: 2px; color: red; font-size: small;">Set YES to auto approve B2B registrations</div>
Auto approve accounts when customers register.		
<b>Form Submission Success Message</b> <small>[store view]</small>	<input type="text" value="Please give us time to verify your account. Thanks for visiting us."/>	<div style="border: 1px solid red; padding: 2px; color: red; font-size: small;">Enter success and failure message for form submission</div>
<b>Form Submission Failure Message</b> <small>[store view]</small>	<input type="text" value="Something went wrong with your account! Please contact us for mor"/>	

#### 5. Admin Email Notification Settings

Configure the settings to send Email notifications to the admin on new B2B registration form submission.

- **Send Email Notification to Admin:** Select YES to send Email notification to the admin when a new B2B registration form is submitted from the frontend.
- **Email ID:** Enter the Email ID of the admin.
- **Email Sender:** Select the Email sender.
- **Email Template:** Select the Email template.

#### Admin Email Notification Settings





<b>Send Email Notification to Admin</b> <small>[store view]</small>	<input type="text" value="Yes"/>	<div style="border: 1px solid red; padding: 2px; color: red; font-size: small;">Set YES to send new registration Email notification to admin</div>
<b>Email ID</b> <small>[store view]</small>	<input type="text" value=""/>	<div style="border: 1px solid red; padding: 2px; color: red; font-size: small;">Enter Email ID of the admin to receive notifications</div>
Email recipients, separated by commas.		
<b>Email Sender</b> <small>[store view]</small>	<input type="text" value="General Contact"/>	<div style="border: 1px solid red; padding: 2px; color: red; font-size: small;">Select Email sender and template</div>
<b>Email Template</b> <small>[store view]</small>	<input type="text" value="Admin Email Template (Default)"/>	
Email template chosen based on theme fallback when "Default" option is selected.		

## 6. Customer Email Notification Settings

Configure the settings to send Email notifications to the customers after their B2B account approval or disapproval.

- **Send Email Notification to Customers:** Set YES to send Email notification to the customers on B2B account approval or disapproval.
- **Email Sender:** Select the Email sender.
- **B2B Account Approval Email Template:** Select template to send an Email to customers on their B2B account approval.
- **B2B Account Disapproval Email Template:** Select template to send an Email to customers on their B2B account disapproval.

Customer Email Notification Settings


Send Email Notification to Customers <small>[store view]</small>	Yes		Set YES to send Email notification to customers
Email Sender <small>[store view]</small>	General Contact		Select Email sender
B2B Account Approval Email Template <small>[store view]</small>	Approve Email Template (Default)		Select template for account approval and disapproval Email
Email template chosen based on theme fallback when "Default" option is selected.			
B2B Account Disapproval Email Template <small>[store view]</small>	Disapprove Email Template (Default)		
Email template chosen based on theme fallback when "Default" option is selected.			

## 7. Google reCAPTCHA Settings

Enable Google reCAPTCHA in the B2B registration form to avoid spam registration requests.

- **Google reCAPTCHA:** Enable the [Google reCAPTCHA v3](#).
- **Site Key:** Enter the site key obtained while registration with Google reCAPTCHA.
- **Secret Key:** Enter the secret key obtained while registration with Google reCAPTCHA.

Google reCAPTCHA Settings

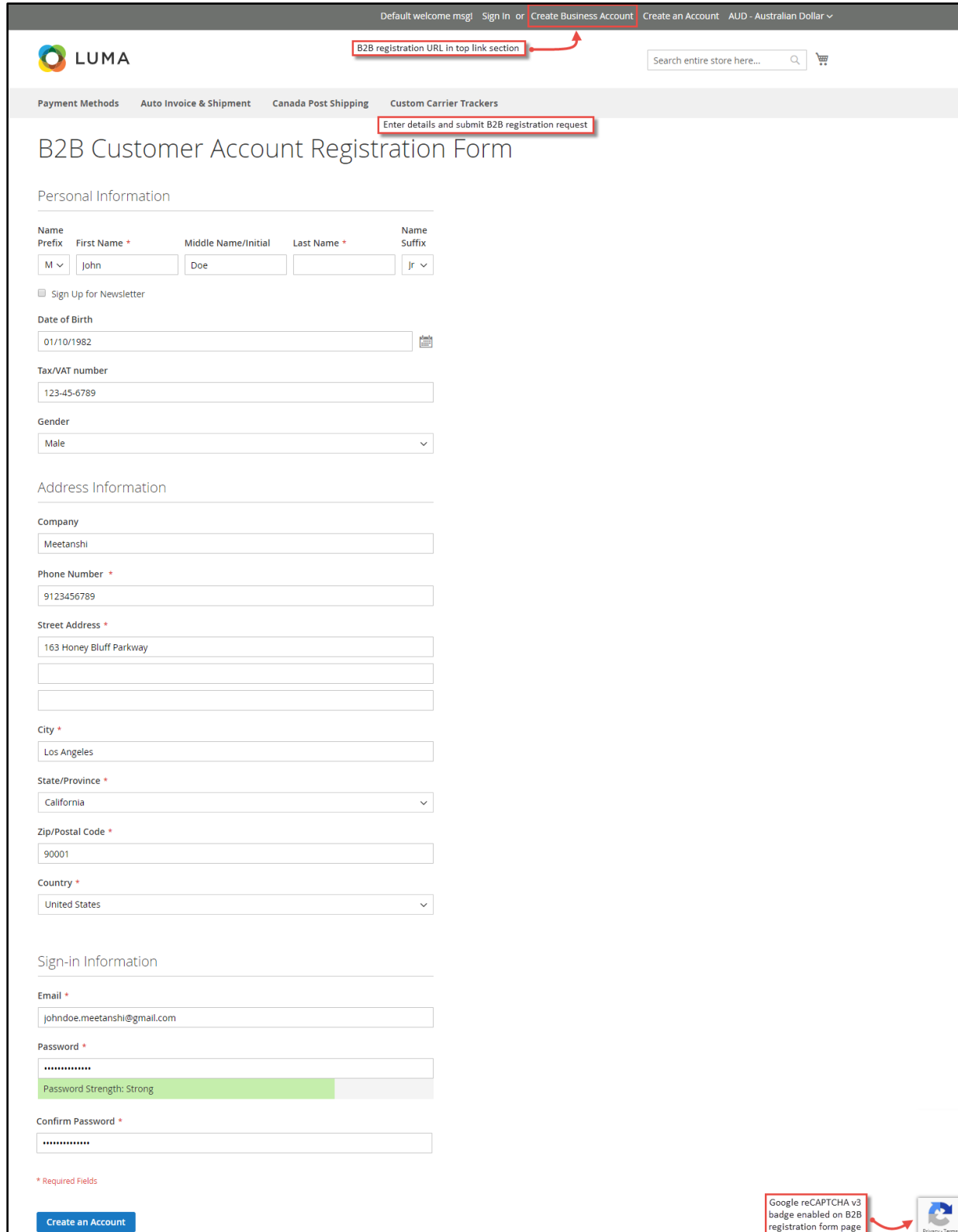
Google reCAPTCHA [store view]   Enable the Google reCAPTCHA  
select to enable google reCAPTCHA in B2B Registration form.

Site Key [store view]   
Register with [Google reCAPTCHA](#) to get your site key. Enter the Site Key obtained while registration with Google reCAPTCHA v3


Secret key [store view]   
Register with [Google reCAPTCHA](#) to get your secret key.

## 8. B2B Registration Form in Frontend

Once the settings are configured, the B2B Registration Form URL is enabled in the top link section of the store frontend. Click the URL to go to the registration form, fill the details and submit to send for approval.



Default welcome msg! | Sign in or **Create Business Account** | Create an Account | AUD - Australian Dollar

**LUMA** | B2B registration URL in top link section | Search entire store here... | 

Payment Methods | Auto Invoice & Shipment | Canada Post Shipping | Custom Carrier Trackers

**B2B Customer Account Registration Form**

Enter details and submit B2B registration request

**Personal Information**

Name  
Prefix: M | First Name: John | Middle Name/Initial: Doe | Last Name: | Name Suffix: Jr

Sign Up for Newsletter

Date of Birth: 01/10/1982

Tax/VAT number: 123-45-6789

Gender: Male

**Address Information**

Company: Meetanshi

Phone Number: 9123456789

Street Address: 163 Honey Bluff Parkway

City: Los Angeles

State/Province: California

Zip/Postal Code: 90001

Country: United States

**Sign-in Information**


Email: johndoe.meetanshi@gmail.com

Password:   
Password Strength: Strong

Confirm Password:

\* Required Fields


**Create an Account**

Google reCAPTCHA v3 badge enabled on B2B registration form page | 





- **B2B Registration Form Submission Success Message**  
After the form is submitted, customers can see form submission success message as set from the backend.


Default welcome msg! [Sign In](#) or [Create Business Account](#) [Create an Account](#)

 **LUMA**

B2B registration form submission successful message

Search entire store here...   

## 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 \*

### New Customers

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

[Create an Account](#)

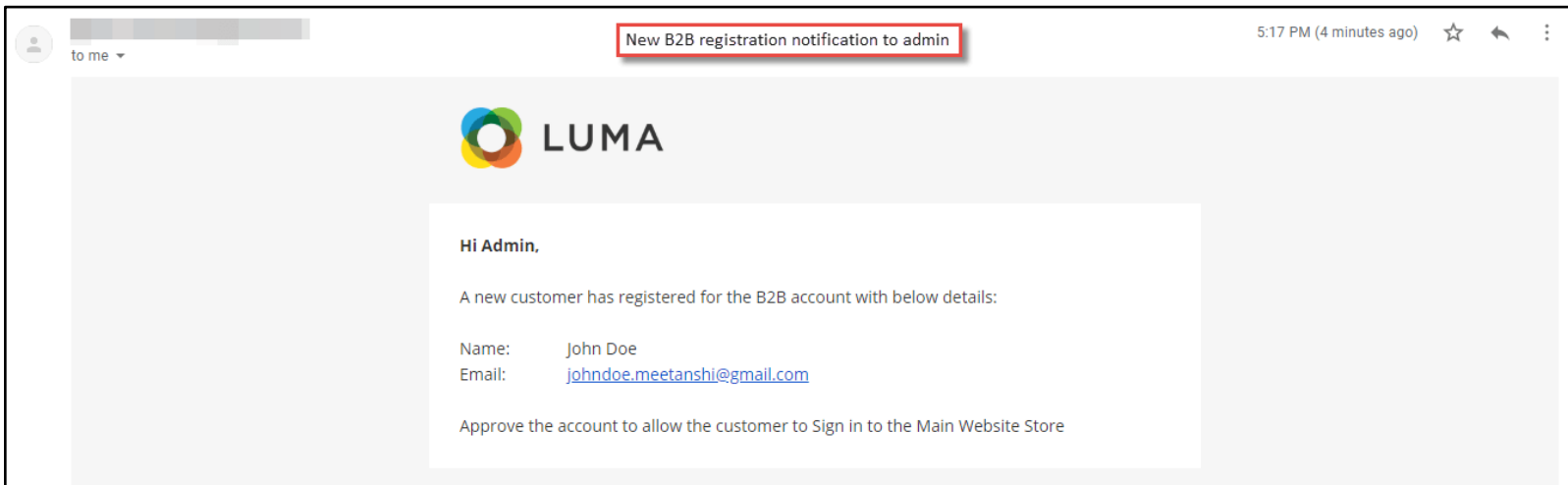
Password \*

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

\* Required Fields

- **New B2B Account Registration Email to admin**

Once a customer submits B2B account registration form from the frontend, the admin gets an Email notification.



## 9. B2B Registration Details in Backend

When the customers submit B2B registration form from the frontend, all the B2B registration form details are stored in the Customers grid in the backend. The admin can view and manage the B2B registrations from here.

Customers B2B Registration

Customers requested for B2B registration saved in the customer grid with respective status

[Add New Customer](#)

Search by keyword

Filters Default View Columns Export

Actions 1 records found 20 per page 1 of 1

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Status	Action
2	Mr John Doe Jr	roni_cost@example.com	Wholesale	9123456789	95136	United States	California	Feb 14, 2019 10:26:31 AM	Main Website	Confirmation Not Required	Default Store View	Jan 10, 1982	123-45-6789	Male	B2B Pending	<a href="#">Edit</a>

- **B2B Account Status Change**

Admin can click on edit to change the status of the B2B account if automatic account approval is not set. Admin can approve or disapprove a B2B account status from the Account Information tab.

John Doe B2B Registration

Unapproved customers can be approved or rejected from here

[Back](#) [Delete Customer](#) [Reset](#) [Reset Password](#) [Force Sign-In](#) [Save and Continue Edit](#) [Save Customer](#)

**CUSTOMER INFORMATION**

Customer View

Account Information

Addresses

Billing Agreements

Wish List

Account Information

Status B2B Pending Change the status of the B2B customer

Associate to Website \* B2B Approved

Group \* Wholesale

Disable Automatic Group Change Based on VAT ID

Name Prefix

First Name \*

Middle Name/Initial

Last Name \*

Name Suffix

Email \*

Date of Birth

## 10. B2B Registration Approval Email to Customers

Once the admin approves a B2B account from the backend, the respective customers get an Email notification with the login link and details.

