

B2B Customer Approval v4.1.0

Using the **B2B Customer Approval** module, the admin can manage the customer registration and login to the store. The customer approval feature enables the admin to approve/disapprove any customer who registers to the store.

The module allows the admin to restrict the customers from logging in to the store after their registration. Additionally, the customer login restriction applies if account approval is pending by the store owner.

Additionally, the admin can send email notifications to the customers upon account approval and disapproval.

Features

- Enable or disable the customer auto-approval feature.
- Allows admin to manage customer .
- Admin may check the customer's current status as pending, reject, or approve.
- Supports customer auto approve or manually approve feature.
- Configure the custom message for the customers when account approval rejects and they are trying to log in.
- Configure the custom message for the customers after their registration.
- Add custom email templates for customer approval.
- Custom email templates for customer disapproval.
- Custom email templates for customer registration.
- The customer gets a notification about the approval or disapproval from the store owner's end.
- The store owner can approve or disapprove multiple customers as per requirement.

Module Configuration

After the installation, the admin will configure the module settings by navigating to **Stores -> Configuration -> Webkul -> Customer Approval** as per the below image.

The screenshot shows the 'Configuration' page for the 'WEBKUL' module, specifically the 'Customer Approval' section. The page is titled 'Configuration' and includes a search icon, a notification bell with '3' alerts, and a user profile 'admin'. Below the title bar, there is a 'Store View' dropdown set to 'Default Config' and a red 'Save Config' button. The left sidebar contains a navigation menu with categories: WEBKUL (expanded), Customer Approval (selected), Marketplace, Demo Management, GENERAL, CATALOG, SECURITY, CUSTOMERS, SALES, YOTPO, ENGAGEMENT CLOUD, SERVICES, and ADVANCED. The main content area is divided into three sections: 'General Settings', 'Email Templates', and 'Admin Notification'. 'General Settings' includes 'Enable Auto Approval for customers' (set to 'No'), 'Account not approved message after Login' (set to 'Account not approved.'), and 'Account not approved message after Registration' (set to 'Registration successful, you will be notified when y'). 'Email Templates' includes 'Customer Account Approval Email Template' (set to 'Customer Approved Email Template (Default)'), 'Customer Account Disapproval Email Template' (set to 'Customer Disapproved Email Template (Defal)'), 'Admin Notification Email Template on Customer Registration' (set to 'Admin Notification Email Template (Default)'), and 'After Registration Email to Customer Template' (set to 'Customer Approval After Registration Email Te'). 'Admin Notification' includes 'Name' (set to 'John Doe') and 'Email' (set to 'john@example.com').

Here, the admin will –

General Settings:

- **Enable Auto Approval for Customers:** Set this to “**No**”, if want to disable the auto-approval and approve the customer accounts manually. Else, set this

to “**Yes**”, if want the auto-approval for the customer accounts.

The screenshot shows the 'General Settings' section of the Magento 2 Admin Panel. A red box highlights the 'Enable Auto Approval for customers' setting, which is set to 'Yes'. Below this, the 'Email Templates' section is visible, showing three dropdown menus for selecting email templates: 'Customer Account Approval Email Template', 'Customer Account Disapproval Email Template', and 'After Registration Email to Customer Template'. Each dropdown menu currently shows a default template name.

- **Account not Approved Message After Login:** Define the display message for the customers when their account is not approved and try to log in.
- **Account not Approved Message After Registration:** So, define the display message for the customers after their registration and their account needs to approve.

Email Templates:

- **Customer Account Approval Email Template:** Select the email template for the mail which will be sent to the customers when their **account gets approved**.
- **Customer Account Disapproval Email Template:** Now, select the email template for the mail which will be sent to the customers when their **account gets disapproved**.
- **After Registration Email to Customer Template:** Select the email template for the mail which will be sent to the customers after their registration.

Note: The admin can even create various custom email templates by navigating to the **Marketing -> Communication -> Email Templates**.

Dashboard

Auction Manager

Sales

Catalog

Customers

Marketing

Content

Email Templates

demo

Add New Template

Search Reset Filter 1 records found 20 per page 1 of 1

| ID | Template | Added | Updated | Subject | Template Type | Action |
|----|-------------------------------|--------------------------|--------------------------|----------------|---------------|-------------------------|
| 1 | Account Approved By The Admin | Nov 27, 2018, 3:15:48 PM | Nov 27, 2018, 3:15:48 PM | {{var myvar2}} | HTML | Preview |

Admin Notification

- **Name-** The customer will receive an mail with the same name as per the specification of this section.
- **Email-** The recipient customer will see the admin mail id on mail as per the specification of this field.

And, lastly will hit the **Save Config** button to save the module configuration successfully.

Customer Approval Registration

If the admin has set the “**Enable Auto Approval for Customers**” option to “**No**”. Then at the front end, the customer will get a message after their registration as per the below image.

Customer Login

✓ Registration successful, you will be notified when your account get approved.

Registered Customers

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

Email *

Password *

Sign In

[Forgot Your Password?](#)

* Required Fields

New Customers

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

Create an Account

After the registration, the customer will get a mail on their mail Ids as per the below image.

From Admin <owner@example.com> ☆

Subject **Registration Successful.**

To Me ☆

[Main Website Store](#)

John,

Account approval in process, you will be notified when your account gets approved.

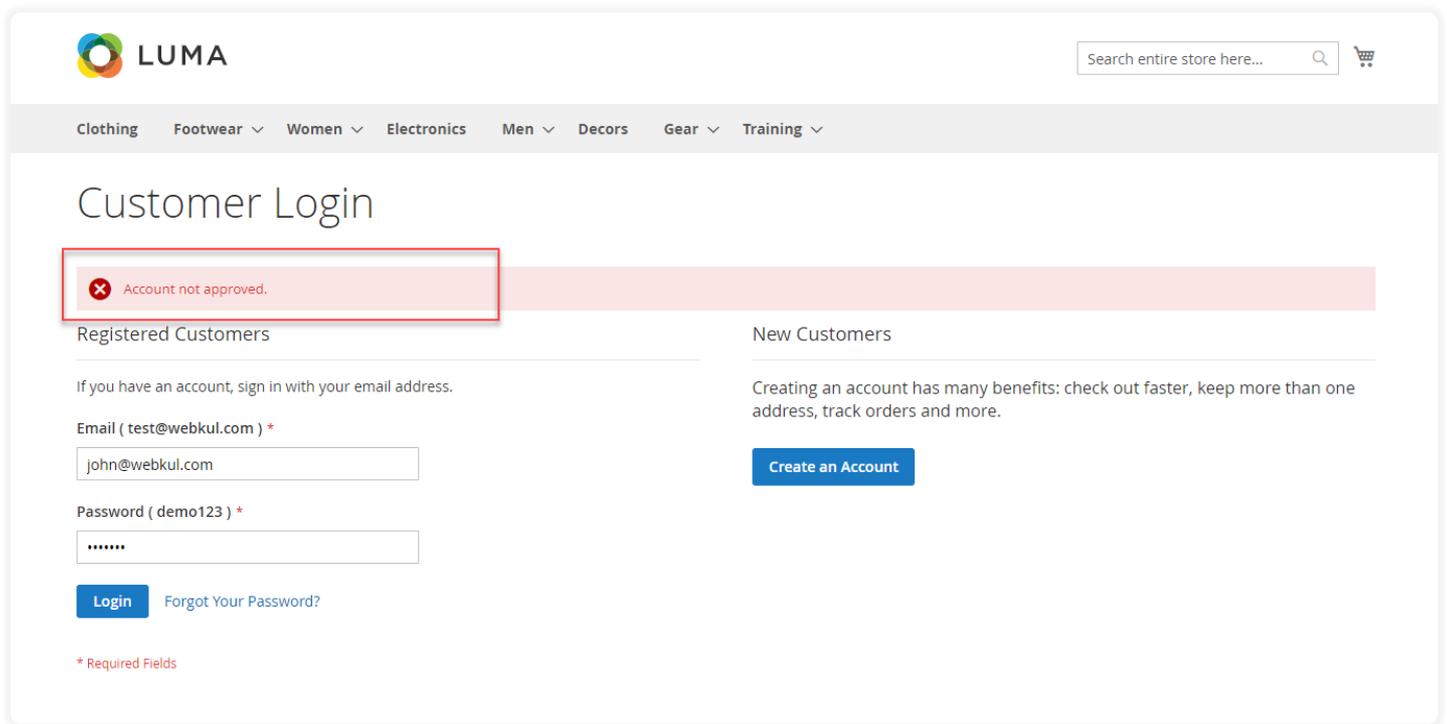
The message and mail will notify the customers that their account needs approval first. So, that the customers can log in into their accounts successfully.

Customer Approval Login

If the admin has set the “**Enable Auto Approval for Customers**” option to “**No**”. Then at the front end, the customer login will have the following workflow as per –

When Account Is Not Approved:

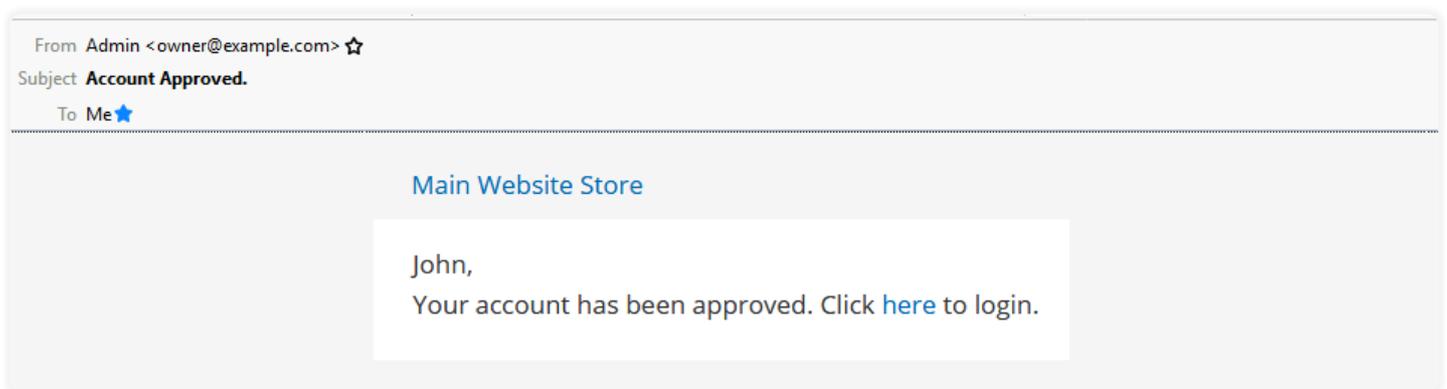
The customers cannot log in and will get an error message when tries to log in. Because their account is not approved yet.



The screenshot shows the LUMA website's Customer Login page. At the top, there is a navigation bar with categories: Clothing, Footwear, Women, Electronics, Men, Decors, Gear, and Training. A search bar and a shopping cart icon are also present. The main heading is "Customer Login". Below this, a red error message box states "Account not approved." The page is divided into two sections: "Registered Customers" and "New Customers". The "Registered Customers" section prompts the user to sign in with their email address. It shows a form with the email "john@webkul.com" and a password "demo123". A "Login" button and a "Forgot Your Password?" link are visible. The "New Customers" section describes the benefits of creating an account and includes a "Create an Account" button. A red asterisk indicates required fields.

When Account Is Approved:

When the customer accounts get approved by the admin, they will get a mail as per the below image.



Once the account gets approved, the customers can log in to their account easily by navigating to the login page.

LUMA

Search entire store here...  

Clothing Footwear ▾ Women ▾ Electronics Men ▾ Decors Gear ▾ Training ▾

Customer Login

Registered Customers

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

Email (test@webkul.com) *

Password (demo123) *

[Login](#) [Forgot Your Password?](#)

* Required Fields

New Customers

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

[Create an Account](#)

Note: The customers also get notified via mail when they are disapproved by the admin.

From Admin <owner@example.com> ☆

Subject **Account Disapproved.**

To Me ★

[Main Website Store](#)

John,
Your account has been Disapproved by Admin.

Customer Approval Management

The admin can easily approve or reject any customer. So, for this, the admin navigates to **Customers -> All Customers**.

Customers demo

[Add New Customer](#)

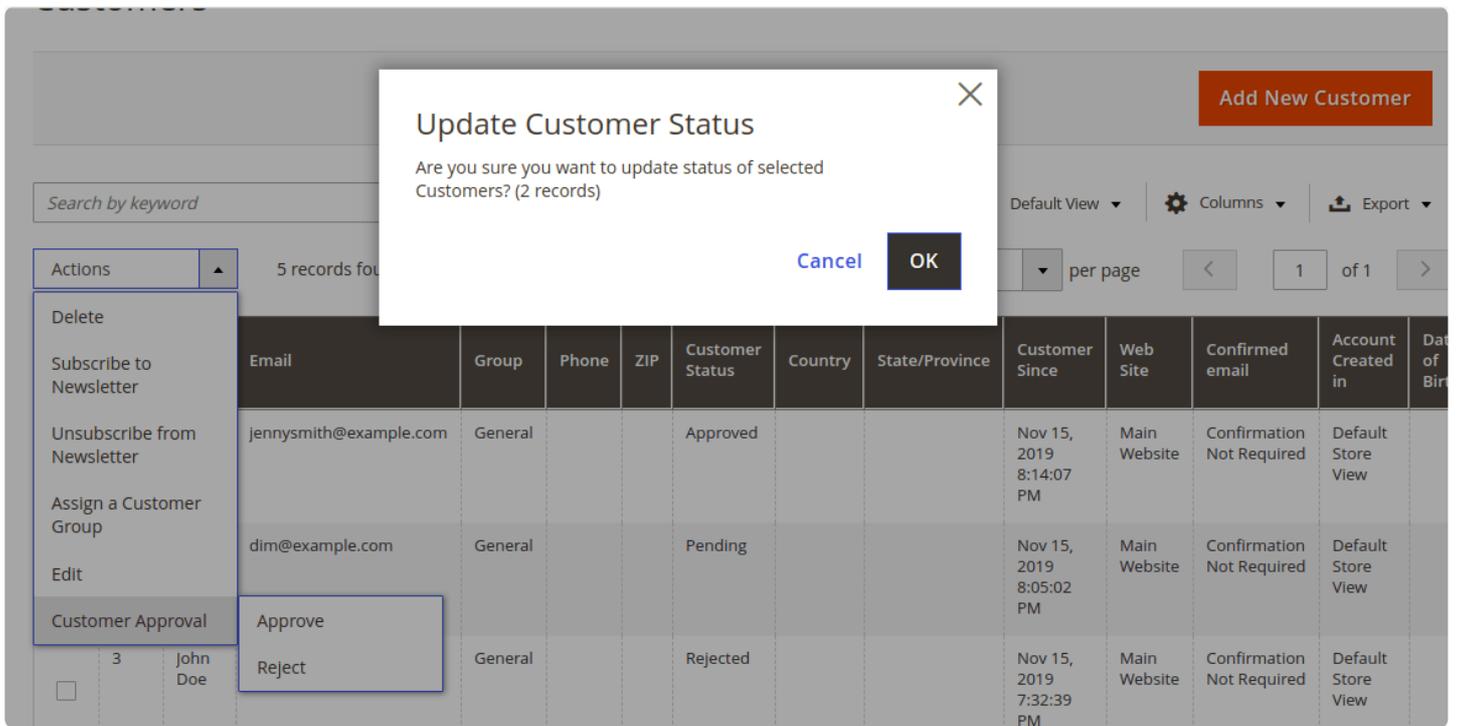
Search by keyword Filters | Default View | Columns | Export

4 records found 20 per page | 1 of 1

| Actions | Group | Phone | ZIP | Country | State/Province | Customer Since | Web Site | Confirmed email | Account Created in | Customer Status | Date of Birth | Tax VAT Number | Gender | Action |
|---|---------|--------------|-------|---------------|----------------|--------------------------|--------------|---------------------------|--------------------|-----------------|---------------|------------------|--------|--------|
| <ul style="list-style-type: none"> Delete Subscribe to Newsletter Unsubscribe from Newsletter Assign a Customer Group Edit Customer Approval | General | 206-200-2899 | 98133 | United States | Washington | Dec 4, 2015 12:33:37 PM | Main Website | Confirmation Not Required | Default Store View | Approved | Aug 3, 1988 | xxxxxxxxxxxxxxxx | Male | Edit |
| | General | 770-913-3462 | 30338 | United States | Georgia | Dec 22, 2015 8:43:03 PM | Main Website | Confirmation Not Required | Default Store View | Approved | Aug 5, 1981 | xxxxxxxxxxxxxxxx | Male | Edit |
| <input type="checkbox"/> | General | 315-628-8898 | 13691 | United States | New York | Dec 22, 2015 9:06:37 PM | Main Website | Confirmation Not Required | Default Store View | Approved | Aug 1, 1976 | xxxxxxxxxxxx | Female | Edit |
| <input type="checkbox"/> | General | | | | | Aug 13, 2018 11:00:27 AM | Main Website | Confirmation Not Required | Default Store View | Approved | | | | Edit |

Here, the admin can:

- View the complete list of the customers.
- Select the customers from the list whose accounts the admin wants to approve or reject.
- So, the Next step is to select the **“Customer Approval”** option from the **“Action”** drop-down list then admin will get two options Approve and Reject.
- Select the **“Approve”** option from the **“Customer Approval”** if want to approve the customer.
- Else, select the **“Reject”** option from the **“Customer Approval”** drop-down if want to disapprove the customer.
- And, a pop-up will appear asking for the confirmation as shown below-



- The admin will hit the **OK** button to confirm the action.
- Admin may check the customer updates status as pending, reject, or approve.
- Customer status has preset **“Pending”** after their registration to the store.
- So, customer Status will be **“Pending”** until the status has changed as a **“Rejected”** or **“Approved”** by admin.

Customers demo

[Add New Customer](#)

Search by keyword

Filters Default View Columns Export

Actions 4 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 | Customer Status | Date of Birth | Tax VAT Number | Gender | Action | |
|--------------------------|------|-----------|-------------------|---------|--------------|---------|----------------|----------------|--------------------------|-----------------|---------------------------|--------------------|---------------|----------------|------------------|--------|----------------------|
| <input type="checkbox"/> | 1 | John Doe | test@webkul.com | General | 206-200-2899 | 98133 | United States | Washington | Dec 4, 2015 12:33:37 PM | Main Website | Confirmation Not Required | Default Store View | Approved | Aug 3, 1988 | xxxxxxxxxxxxxxxx | Male | Edit |
| <input type="checkbox"/> | 2 | Peter Doe | test2@webkul.com | General | 770-913-3462 | 30338 | United States | Georgia | Dec 22, 2015 8:43:03 PM | Main Website | Confirmation Not Required | Default Store View | Approved | Aug 5, 1981 | xxxxxxxxxxxxxxxx | Male | Edit |
| <input type="checkbox"/> | 3 | Jane Doe | test1@example.com | General | 315-628-8898 | 13691 | United States | New York | Dec 22, 2015 9:06:37 PM | Main Website | Confirmation Not Required | Default Store View | Approved | Aug 1, 1976 | xxxxxxxxxxxx | Female | Edit |
| <input type="checkbox"/> | 4 | Jane Doe | test1@webkul.com | General | | | | | Aug 13, 2018 11:00:27 AM | Main Website | Confirmation Not Required | Default Store View | Approved | | | | Edit |

NOTE: The customer gets a mail notification of approval or rejection by the store owner.

Thus, another way of approving or disapproving the customer is by navigating to the **Customer Information** page as shown below-

The screenshot shows the 'Customer Information' page for 'John Doe'. The page has a navigation bar at the top with buttons: Back, Delete Customer, Reset, Create Order, Reset Password, Force Sign-In, Save and Continue Edit, and Save Customer. On the left, there is a sidebar with a 'CUSTOMER INFORMATION' section containing links for Customer View, Account Information (highlighted with a red box), Addresses, Orders, Billing Agreements, Newsletter, Product Reviews, and Wish List. The main content area is titled 'Account Information' and contains various fields: Associate to Website (Main Website), Group (General), a checkbox for 'Disable Automatic Group Change Based on VAT ID', Prefix, First Name (John), Middle Name/Initial, Last Name (Doe), Suffix, Email (test@webkul.com), Date of Birth (08/3/1988), Customer Status (Approve - highlighted with a red box), Tax/VAT Number (xxxxxxxxxxxxxxxx), Gender (Male), Send Welcome Email From (Default Store View), and Vertex Customer Code.

So, under the **Account Information** section, the admin will have the **Customer Status** field. However, the admin will set this option to “**Approve**” if want to approve the customer.

Otherwise, set this option to “**Reject**” if want to disapprove the customer.

That’s all for **B2B Customer Approval** module. Still, have any issue please feel free to add a ticket at <https://webkul.uvdesk.com/>