VALIDATE CUSTOMERS B2B

módulos
4webs

CERTIFIED MODULE

CONTENTS

Purpose and functionality

"Validate Customers B2B" is a module developed by 4webs with the objective of allowing you to manually validate the customer registration in your store. This is very useful for a B2B business, or if you simply want to keep track of the data of your customers and the groups in which they register.

Thus, your customers may send registration requests, which will be correspondingly notified to the address or email addresses that you can determine.

On the other hand, the module includes the possibility of sending editable emails to your customers, informing them that your registration request has been sent and, if necessary, that your client account has been activated.

Technical description and requirements

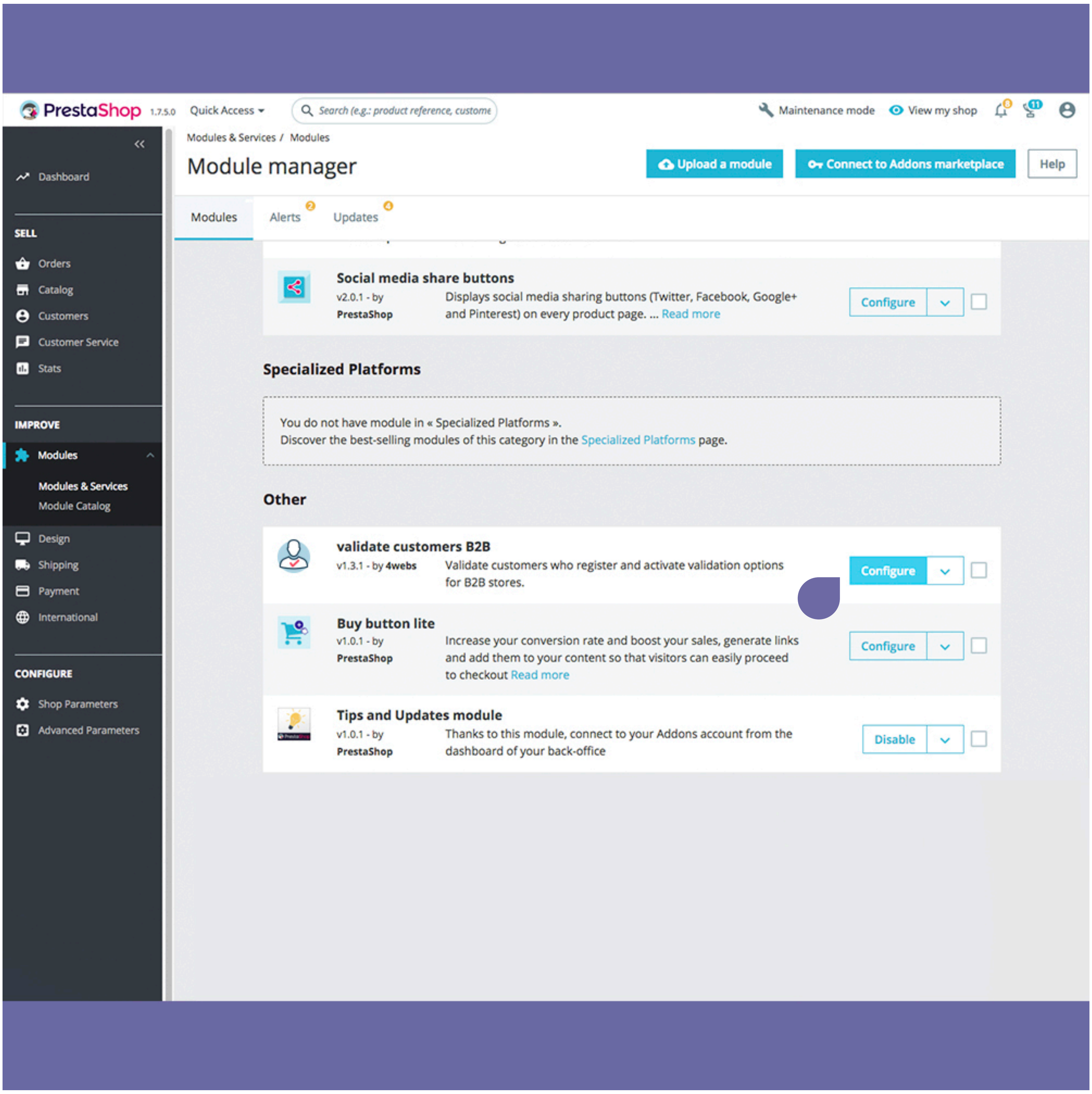
VERSION: 1.3.1
COMPATIBILITY: 1.5.0.0 – 1.7.5.0

Installation and configuration

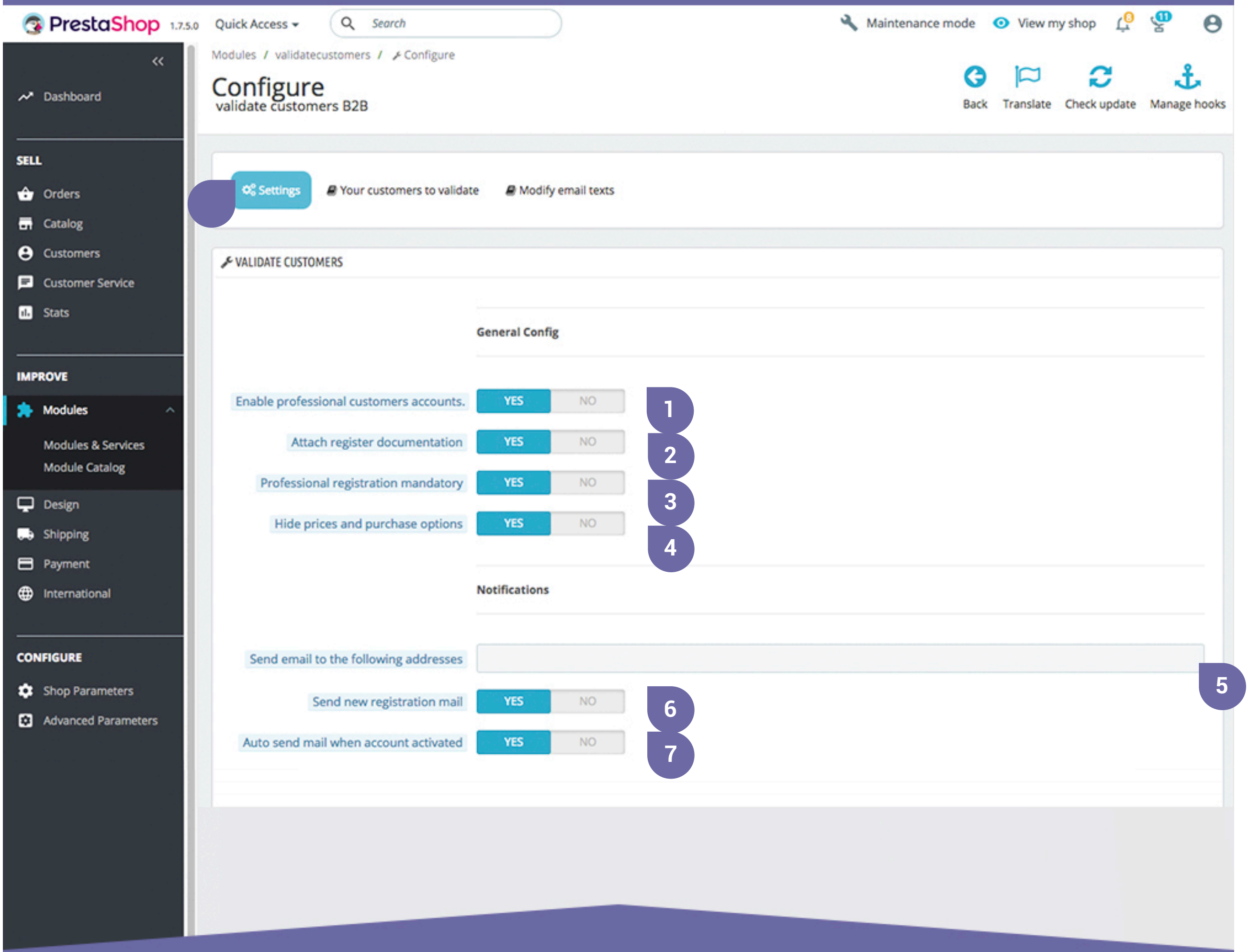
First, it is necessary to upload the module to the server. Later, you can find it in your module search and click on the option "Install". You can also access more quickly through the "Orders" section, in which you will find it integrated.

Next, a series of screenshots will be shown that will graphically explain the simple configuration and use process of this module.

Once installed, look for "B2B Customer Validator" in your list of modules and access your options through the "Configure" button, indicated in the image below.



Within the first tab of the module, "Configuration" you can define the parameters referring to the registration and notifications that are described below:



FIELD CONFIGURATION FOR CLIENT REGISTRATION AND NOTIFICATIONS

1. Enabling this option, your clients must present the documentation that accredits them as professionals.

2. By activating this functionality, a field will appear in the registration form so that your clients can attach the precise documents for validation.

3. Activating this option, the field "I am autonomous or company" will be mandatory for the sending of the request.

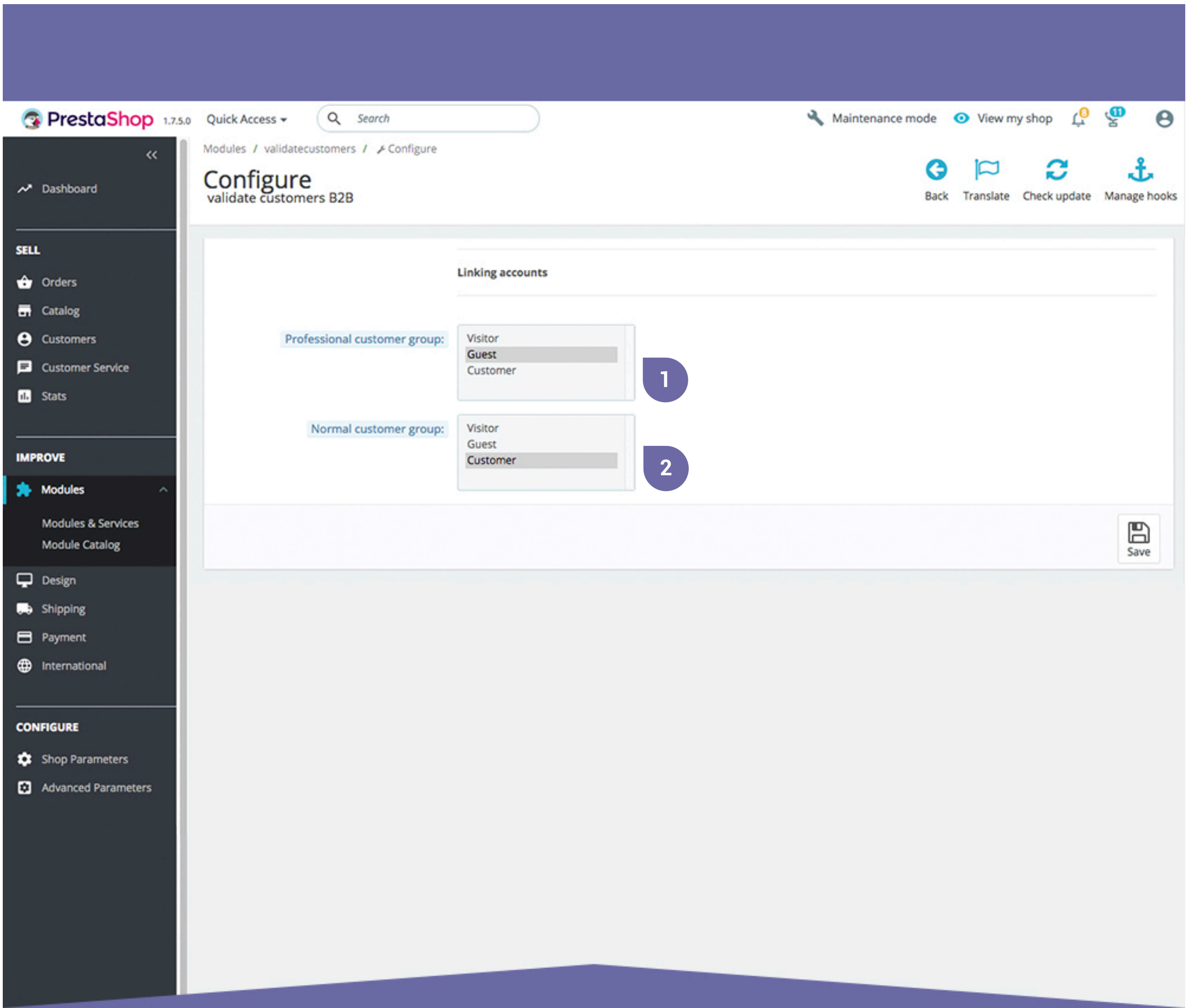
4. Hide, if you wish, the prices of your items to unregistered and unverified customers. This option will modify all access permissions to all client groups, except for professionals.

5. Write here the email addresses where you want to receive customer activation requests.

6. Here you can enable the sending of received request emails to your clients when they register.

7. By activating this functionality, your clients will receive a confirmation email when their request is validated.

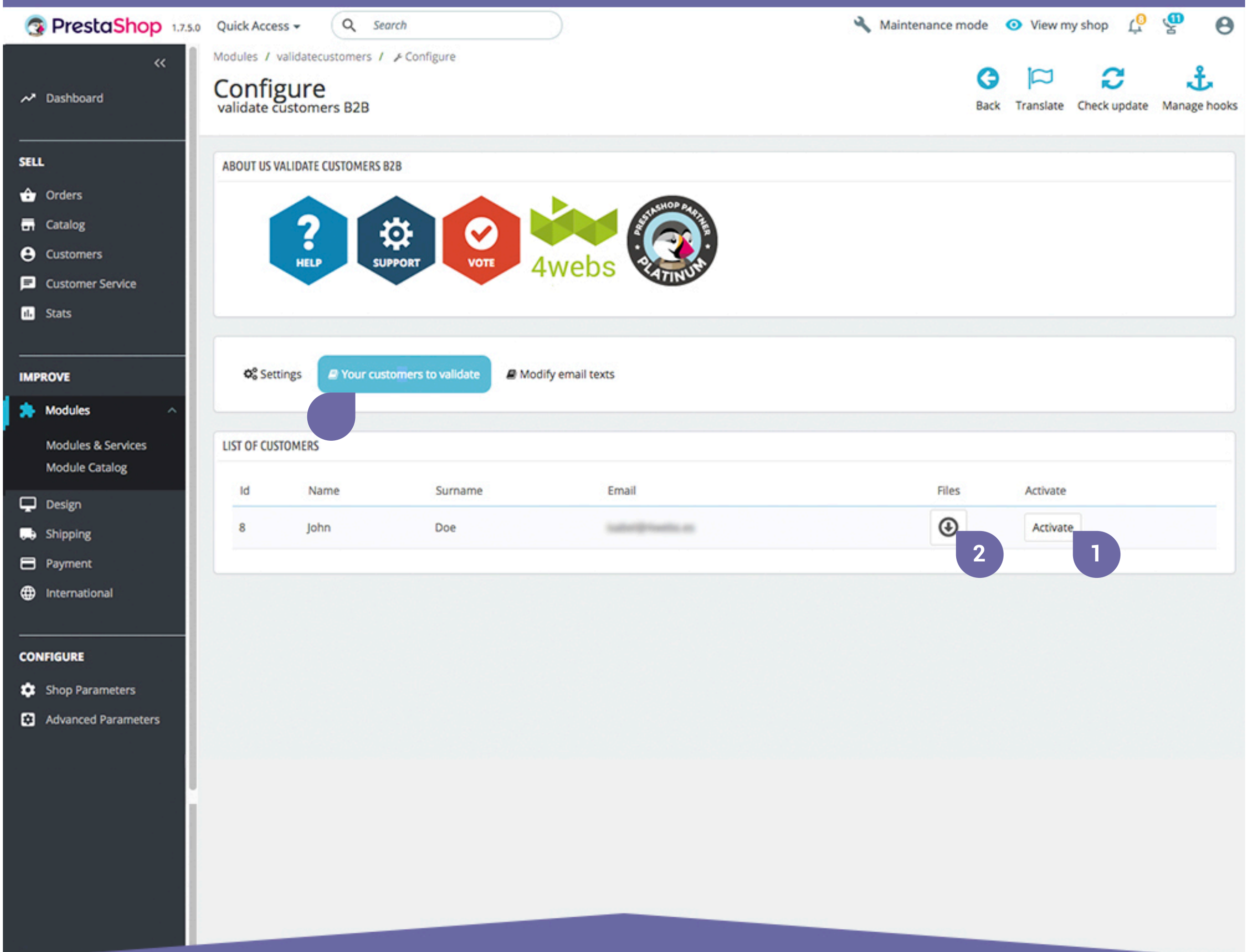
Scrolling in the same "Configuration" tab will also find the options shown below:



LINKING ACCOUNTS
TO EACH GROUP OF CLIENTS

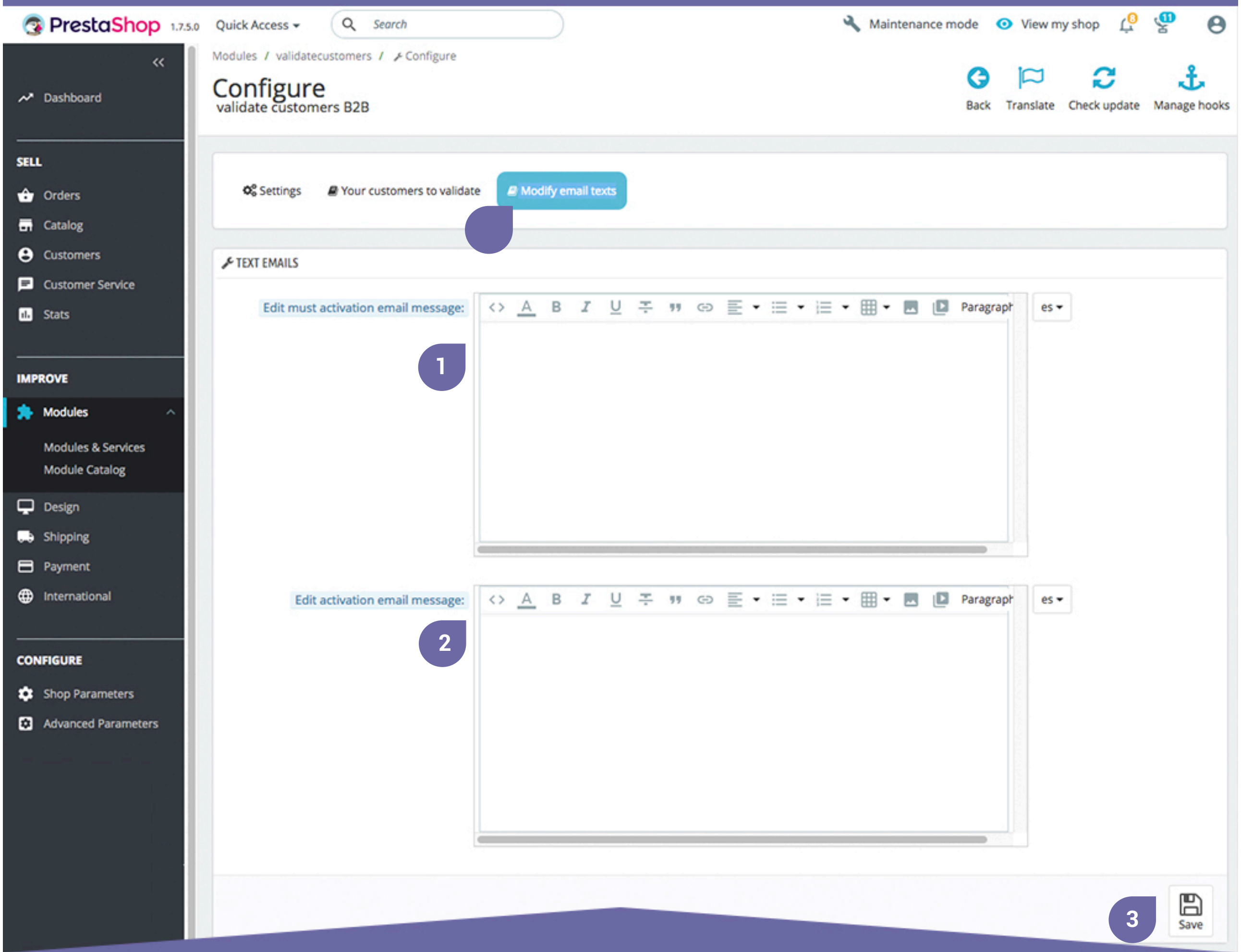
1. Select in this drop-down the group in which the professional clients will be located.
2. Determine here the group of clients where those who do not register as professionals will be collected.
3. Finally, save your configuration.

In the second section of the configuration of the module "Your customers to validate", you can view a list of all the clients whose validation is pending. By activating the "Activate" button (indicated with point 1 in the lower capture), you can directly validate your clients. If, on the contrary, you want to preview the registration data and / or modify them, you can do so through your list of Prestashop clients (see on pages 9, 10 and 11 of this manual). In this list, you can also review the documentation (if any) that has been attached by your client (point 2).



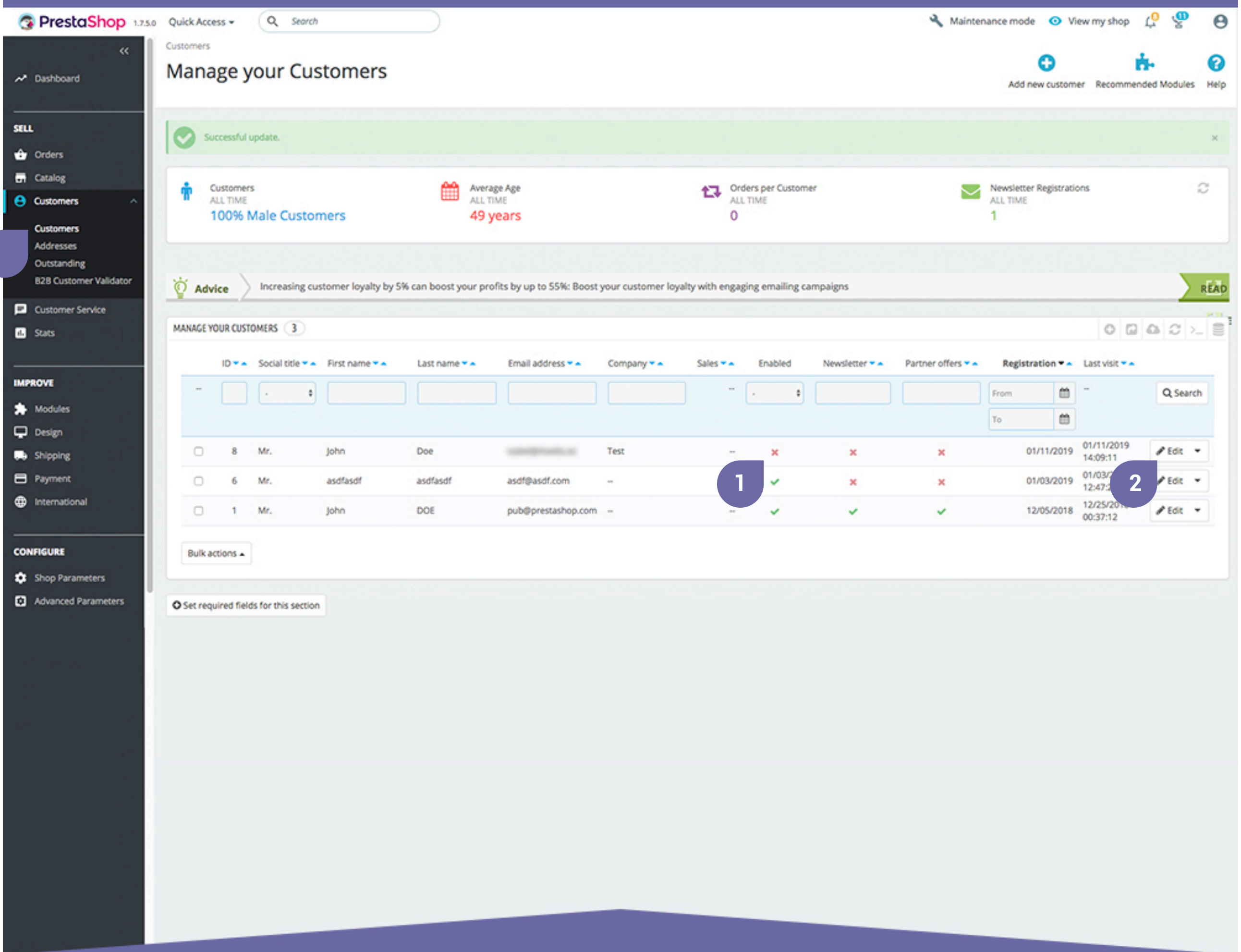
LIST OF CLIENTS
WITH PENDING VALIDATION

In the last configuration tab of the module "Modify email texts", you can define the content of the confirmation emails that your clients will receive after sending the registration request, reminding them that their activation is pending (point1) and when their request has been validated (point 2). Remember to save the changes made (point 3).



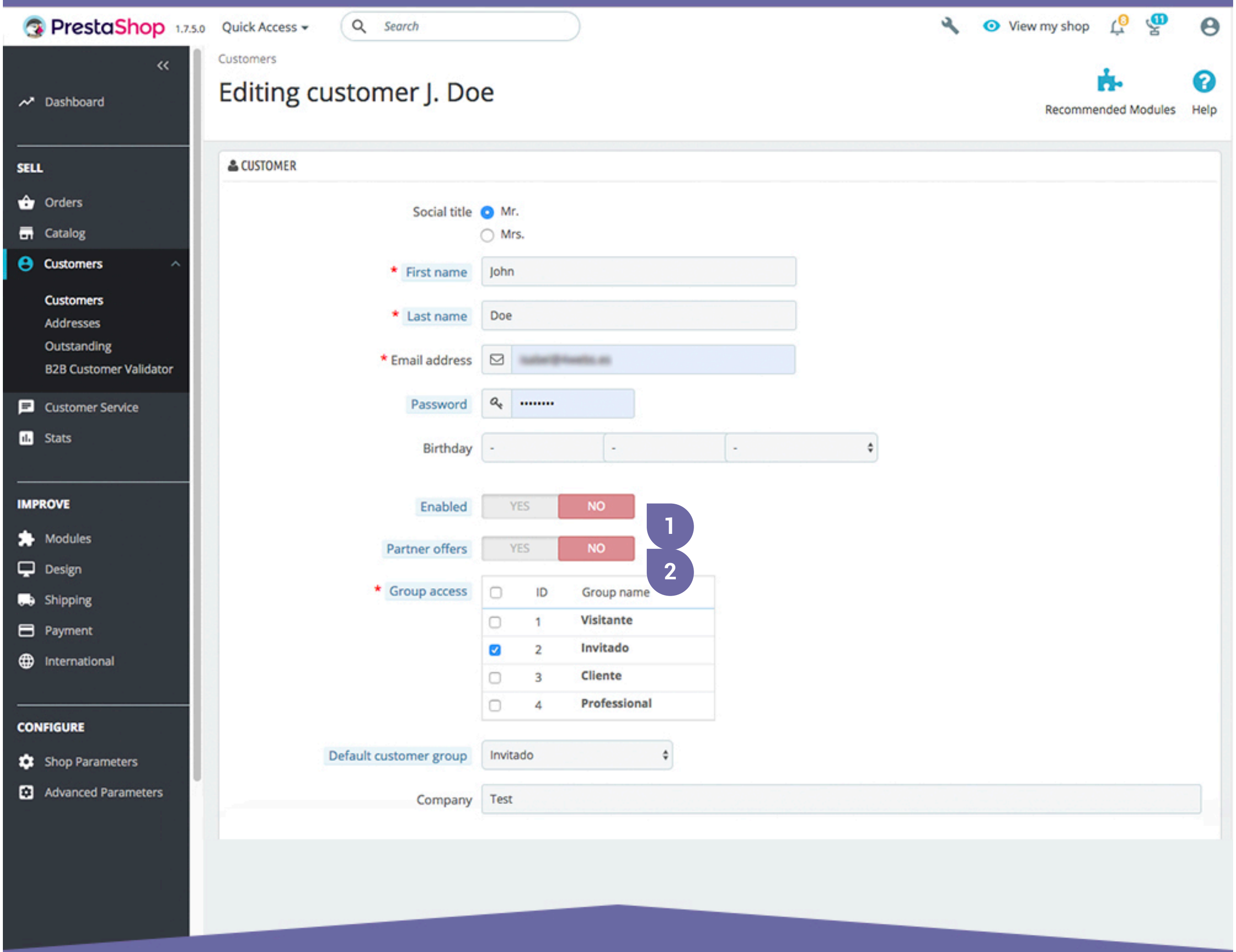
NOTIFICATION EMAILS
FOR CUSTOMERS

Next, we will explain how you can verify or modify the request data of your clients before validating them. To do this, go to the "Customers" section, located in the side menu of your back-end. Here you can see which applications are pending validation, as indicated by the red cross in the "Activated" column that you can see in the lower capture (point 1). Click on this client or on the "Modify" button (point 2) to edit it.



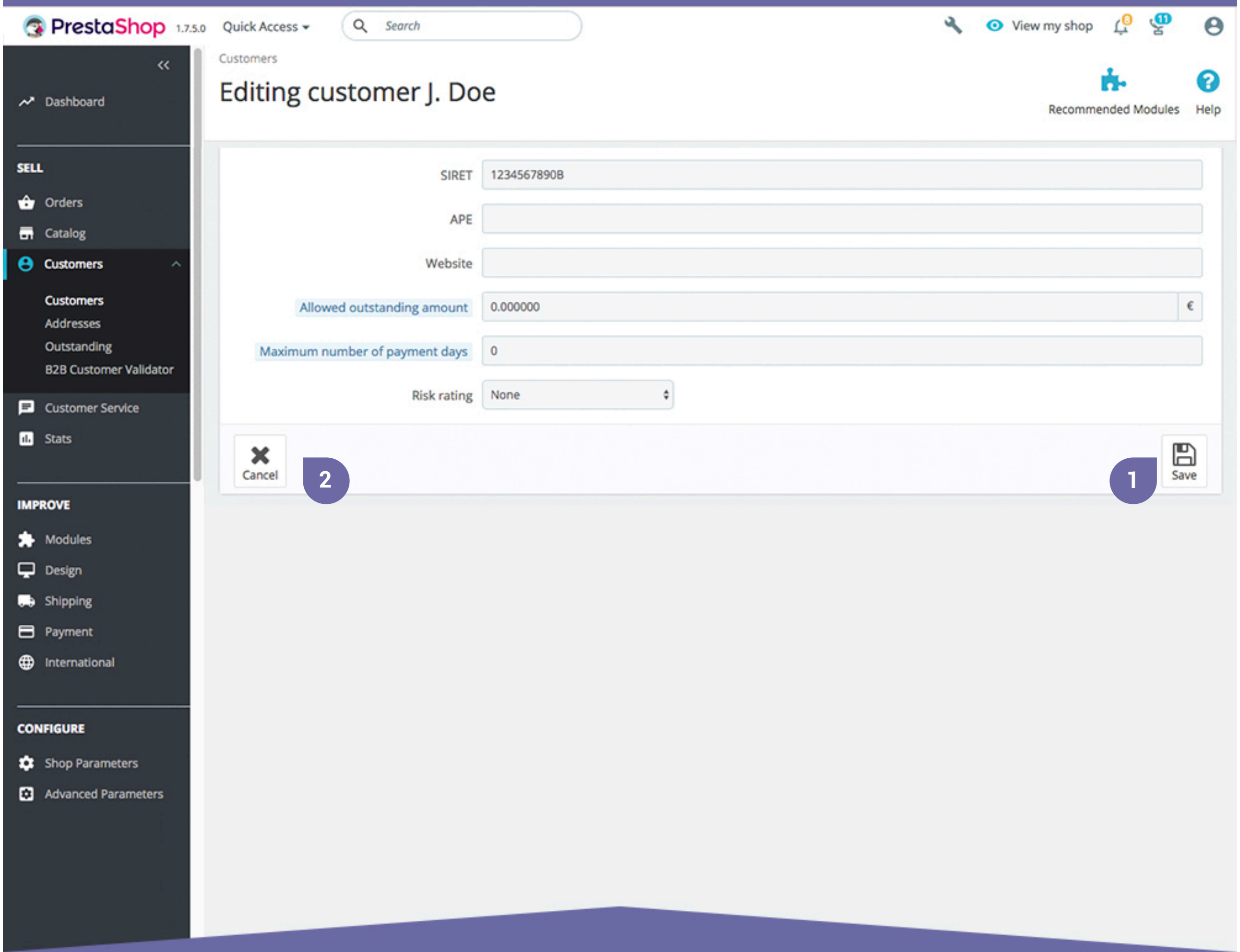
THE CUSTOMER REQUESTING ACTIVATION
WILL APPEAR ALREADY IN YOUR CLIENT LIST

Once inside the client, you can see and modify at any time all the data that he has completed in the application form of your store. Also, once reviewed and accepted all the data and the attached documentation (if any), you can validate this client by enabling the activation (point 1). You can also activate the "Partners offers" indicated in point 2.



YOU WILL BE ABLE TO ACTIVATE AND MODIFY
THE CLIENT'S DATA AT ALL TIMES

Once all the configuration and validation of data has been completed, do not forget to save the changes to make it effective (point 1), or cancel to discard the changes (point 2).



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Notes to developers

This module does not modify any controller or intervene in any critical Prestashop process.

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