

B2B - Configuring the Portal Settings

Last Modified on 03/10/2023 12:15 pm EST

To access the B2B Portal settings, go to Admin > B2B Customer Portals > B2B Customer Portal Settings.

Please note, only the Order Time Master Administrator has access to configure the B2B Portal settings, other Order Time users can not access the settings.

On this screen you will set up the numerous customization options available to make your portal reflect your company's branding and more. I'll go through each tab in detail.

• General Tab

Admin > B2B Customer Portals > B2B Customer Portal Settings

B2B Customer Portal Settings

Save Cancel

General Products Account

Font & Colors

Color

#e64d79

Logo Image

widget.png

Allow leads to self register.

Terms Pay on Order

Links

Terms of Use Url
https://app.orderstime.com/home/TermsOfUse

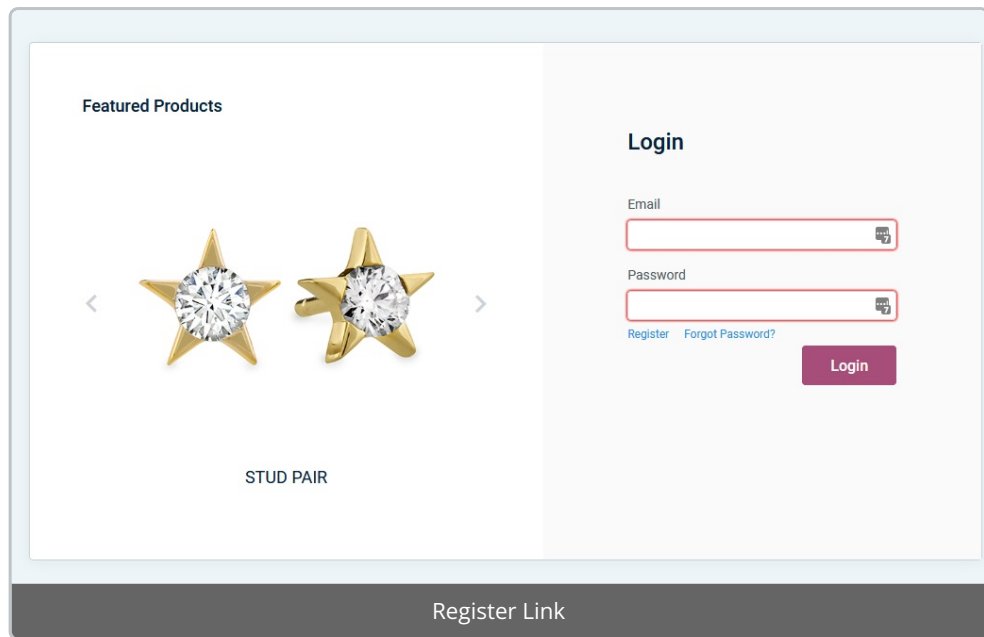
Privacy Url
https://app.orderstime.com/home/Privacy

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General Tab under B2B Customer Portal Settings

○ Font & Colors

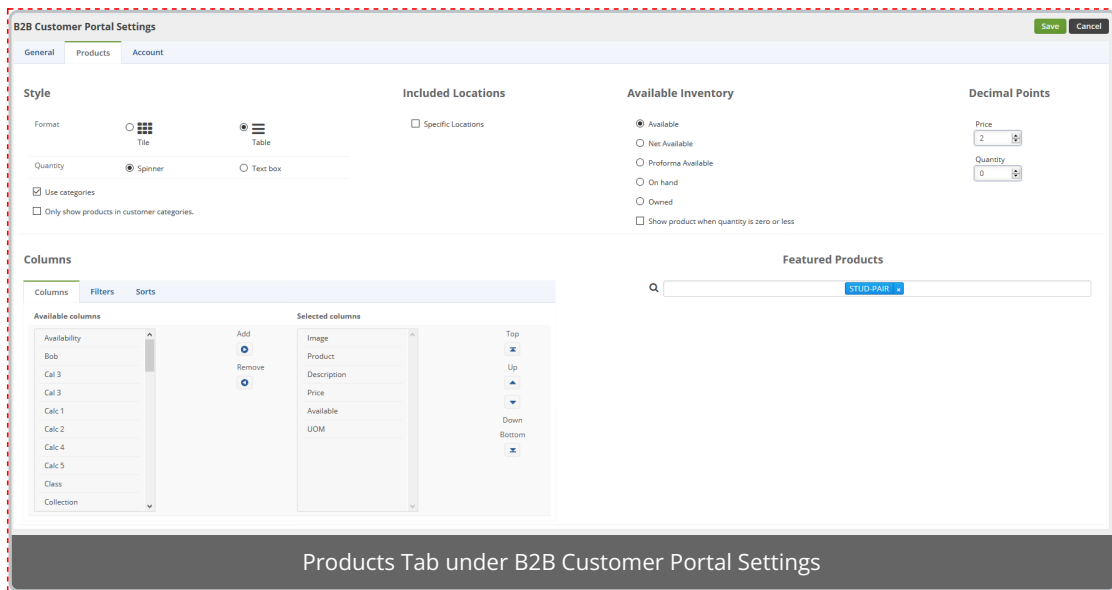
- Color - Set the general color theme for your B2B Portal. You will be able to go back and edit these settings later to fine tune it.
- Logo Image - Choose from the drop-down. To add more go to Admin > Company Info > Images Section > Add
- Allow leads to self register - Checking this makes it so that the Register link shows up. Customers can register for portal access



○ Links

- Terms of Use URL - (Ex. <https://app.ordertime.com/home/TermsOfUse>)
- Privacy URL - (Ex. <https://app.ordertime.com/home/Privacy>)
- Copyright Notice - (Ex. NumberCruncher.com, Inc.)

● Products Tab



○ Style

- Format
 - Tile - Displays products in a grid
 - Table - Displays products row by row
- Quantity
 - Spinner - Allows them to click an up or down arrow to add quantity
 - Text Box - Must type in quantity in a text box
- Use Categories

- Checked - Uses the categories set up in Admin > Profile Lists > Categories
- Unchecked - Doesn't pull from those
- Filter Customer Categories
 - Checked - Filters by the Customer Categories setup in your Customer Editor (These are Top-Level vs. Nested Categories)
 - Unchecked - No Customer Category filtering
- **Included Locations**
 - Specific Locations
 - Checked - Limit this portal to only pull from specific locations
 - A text box appears, click on it to see a list of your locations
 - As you click on them they get added, click the little X to remove them.
 - Unchecked - Will display inventory from all locations according to your Item filters
- **Available Inventory**
 - Available - Show Available
 - Net Available - Only Show Net Available
 - Proforma Available - Only Show Proforma Available
 - On Hand - Only Show On Hand
 - Owned - Only Show Owned
 - Show product when quantity is zero or less
 - Checked - Product will still show up in the grid / rows even though it has no quantity
 - Unchecked - Products with zero or less quantity won't show up in your portal
- **Decimal Points**
 - Price - How many decimal points to allow for your Price Field
 - Quantity - How many decimal points to allow for your Quantity Field
- **Columns**
 - Columns - Set the columns that appear for your portal Items (Ex. Image / Product / Description / Price / Available / UOM)
 - Filters - Set the default Item Filters (Ex. Group / Price)
 - Sort - Set the default Item Sort (Ex. Price / Size)
- **Featured Products**
 - Choose up to 5 Featured Products for your carousel
 - You can start typing in a product name, or just click on the textbox for a drop-down list
 - Click on the items you'd like and it adds them to Featured Products
 - Click the little X next to one to remove it from the list
- **Account Tab**

Admin > B2B Customer Portals > B2B Customer Portal Settings

B2B Customer Portal Settings

General Products Account

Preferences

- Allow customer to edit payment method
- Allow customer to create sales orders
- Initial order status:
- Allow a customer to pay for past invoices through the portal.

Form Templates

Sales Orders:

Ship Doc/Invoice:

Shipping Address

- Use Customer Shipping Address
- Allow customer to edit address
- Allow user to add a new ship address
- Customer Enters Shipping Address per Order
- Display shipping address names

Email Template

- Send mail after order is confirmed
- Email Template:

Bulk Order Import

Easy Sales Order Mapping:

Cart Item Mapping:

Shipping Options

- Ship Methods
- Shipping will be calculated after the order is received.

Q: Add ship methods

Other Order Options

- Customer can enter the memo
- Customer can enter the promise date
- Create drop ship PO when sales order is created
- Customer can enter line instructions

Columns

Orders Invoices

Available columns: Account #, Actual Number, Additional Fee, Additional Fee Amount, Additional Fee Rate, Additional Fee Sales Tax, Age, Allocation Percent, Allocation Status, Allow Ship Partial

Selected columns: NO., Date, Customer PO, Total Amount, Balance, Status, Due Days, Paid

Top, Up, Down, Bottom

o Preferences

- Allow customer to edit addresses
 - Checked - Allows the customer to edit their shipping and billing address
 - Unchecked - Customers are unable to change their addresses, you control changes
- Allow customer to edit payment method
 - Checked - Allow the customer to change their credit card on file
 - Unchecked - Customers are unable to change their payment method, you control changes
- Allow customer to create sales orders
 - Checked - This is the default, it allows them to cart an order and at the end it becomes a Sales Order
 - Unchecked - This doesn't allow the order to be carted. At the end they can just reference the order.
- Create Linked PO when sales order is created
 - Checked - Creates a linked Purchase order when the Sales Order is created at the end.
 - Unchecked - No Linked PO is created

o Form Templates

- Sales Orders - Choose from the drop-down which Sales Order Template to use
 - This will display to the customer
 - When they select the Print button, this is the template that will be used for the PDF
- Ship Doc / Invoice - Choose from the drop-down which Ship Doc / Invoice Template to use
 - This will display to the customer
 - When they select the Print button, this is the template that will be used for the PDF
- Purchase Orders - Choose from the drop-down which Purchase Order template to use
 - This will display to the customer
 - When they select the Print button, this is the template that will be used for

the PDF

- **Email Template**

- Send mail after order is confirmed
 - Checked - Will send an email to the Customer Email on file
 - Select your preferred Email Template from the drop-down provided
 - Unchecked - No automatic e-mails will be sent
- Email Linked PO to vendor
 - Checked - Will send an email to the Vendor Email on file
 - Select your preferred Email Template from the drop-down provided
 - Unchecked - No automatic e-mails will be sent to the vendor

- **Columns**

- Orders - When your customer selects to view their Open Orders, these are the columns that appear to them on that list
 - (Ex. No. / Date / Customer PO / Total Amount / Status)
- Invoices - When your customer selects the button to View and pay invoices, these are the columns that appear to them on that list
 - (Ex. No. / Date / Customer PO / Total Amount / Balance)

- **Shipping Options**

- You can select between:
 - Shipping Methods - This utilizes the search drop-down below, select the shipping methods you would like to show the customer.
 - Shipping Carrier Accounts - This utilizes the shipping carrier accounts that you have setup and shows them to the customer.
 - Shipping will be calculated after the order is received - This allows you to calculate and charge the customer for shipping later from the Sales Order that is created. The customer will not have shipping options to choose from while carting the order.
- In this section you can force the Shipping Methods you would like to offer.
 - This is similar to the Featured Items Section
 - You can start typing in a Shipping Method, or just click on the textbox for a drop-down list
 - Click on the methods you'd like and it adds them to the Shipping Methods
 - Click the little X next to one to remove it from the list

- **Other Order Options**

- Customer can enter the Memo
- Customer can enter the Promise Date
- Create Drop Ship PO when Sales Order is created
- Customer can enter line instructions

- **MAKE SURE YOU HIT SAVE ON THE TOP-RIGHT**

- You can always return to these settings by going to Admin > B2B Customer Portals > Click Configure on the Portal

- **TO APPLY ALL OF THESE CHANGES YOU MUST REFRESH YOUR PORTAL**
 - To do this go to Admin > B2B Customer Portals > Click Refresh Portal (It's below the Configure & Deactivate Buttons)
- Next Step, [Learn How to Set Up Categories](#)

[Return to the B2B Portal Guide](#)