

Webinar - B2B Portal New Features + Open Q&A

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Webinar Notes:

Order Time - New Features in the B2B Portal + Open Q&A

- **B2B Portal**
 - **New Features:**
 - **The registration link has been added for your customers to self-register.**
 - **When they enter information into the form it makes them a Lead in Order Time.**
 - **Once they purchase from your portal they**

- become a Customer.
- **New Shipping Options are now available due to user request.**
 - **Shipping Methods**
 - **Shipping Carrier Accounts**
 - **Estimates the Shipping**
 - **Shipping Calculated When the Order is Received**
- **The ability for a Customer to Duplicate a Sales Order while viewing a Past Order**
- **Categories:**
 - **You can add items to any Categories you want.**
 - **Customers are added to the top-level Category.**
- **More information here:**
<https://help.ordertime.com/help/b2b-portal>
- **Emails**
 - **Under the Customers / Leads / Contacts List**
 - **Batch Emailing enabled in the top-left of the list through the Batch Actions drop-down.**
 - **No need to send a Form now, you can just send a Quote Template.**
- **Questions**
 - **B2B Portal: How does it keep track of Assembly items that are not made yet as it pertains to ordering?**
 - **If you have it set to show Items that have zero quantity, it will appear**
 - **We have a chance to make this a new feature based on our new Can Make field, we'll be working on this.**
 - **When sending emails to customers, is it possible to send to all contacts?**
 - **We can only send to a maximum 500 Contacts at a time so that we don't hit a**

Spam Filter

- Do you have time to show us how to set up a basic form email template when sending invoices basic templates?
 - Went through this on the video, the video will be up in a few days
- If a customer has 3 contacts, can we send it to all 3 contacts in that customer?
 - We're going to look into this as a feature.
 - In the mean time, you can go to the Contacts List and select all 3 and then batch email them.
- Can multiple email addresses be added to a customer so that when the ship doc is synced to QB, the invoices are sent to multiple addresses?
 - We're going to look into this as a future feature, it requires an option added, or a change to how it syncs.
- Are you planning to have dashboards in warehouse tab? Pick performance tracking, number of orders processed?
 - Since all the dashboards are based on Reports we can certainly add that.
 - There are a few different reports we could conceptualize there.
 - Let us look into this as a future feature.
- When an item is picked - is it taken out of inventory or still there until marked shipped?
 - - Once the Ship Doc is set to Shipped it is committed.
 - Available goes down when that status is selected.
 - For more on this check out: [Understanding Quantities in Order Time](#)

- Past Webinars

- **Head here to see all Past Webinars:**
<https://help.ordertime.com/help/past-webinars>
- **Today's webinar will be up in a few days!**

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If you have any questions you'd like answered or topics for future webinars, send them to me at michael@ordertime.com

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