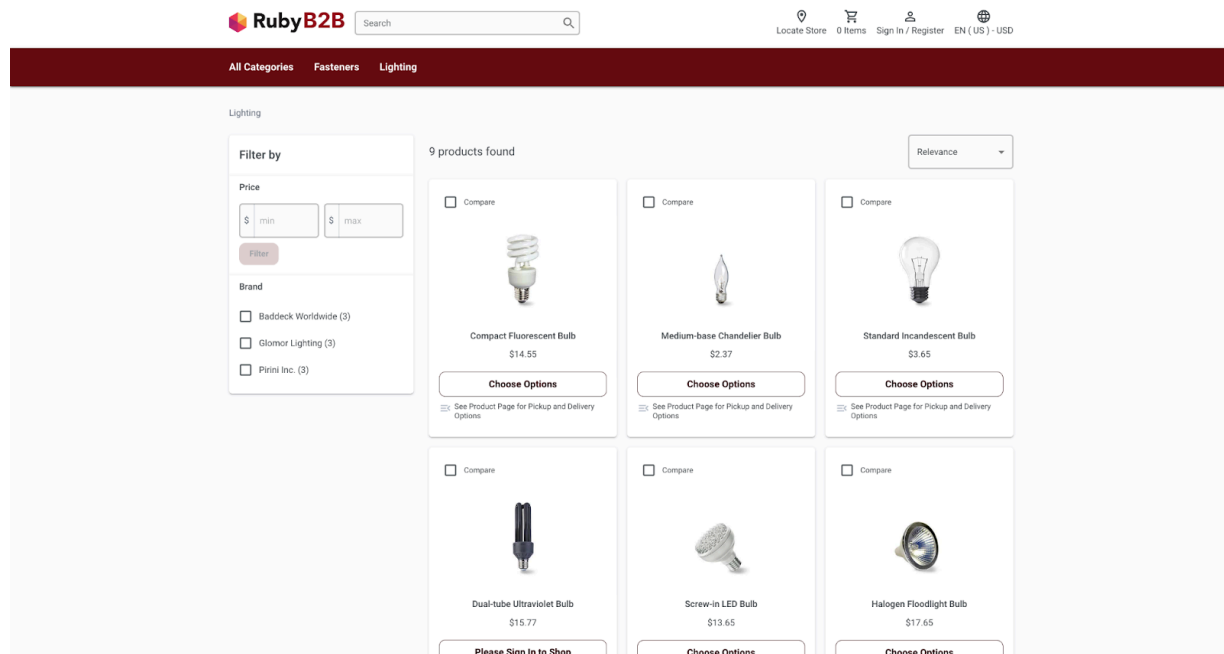


# B2B Tutorial

## Step 1 - Review Current Website Content

1. Open up Ruby B2B Storefront from the Marketplace link
2. Review the products categories that are shown (Fasteners and Lighting)
3. Click on the lighting and view the products listed
  - a. Make note of the variety of prices



## Step 2 – Register New Organization

1. Within the Ruby B2B store, click on the “sign-in” button in the upper right corner
2. Click on “Organization Registration” button
3. Complete the form with the following information:
  - **Organization Name:** Charlotte Lighting
  - **Email:** [info@charlight.com](mailto:info@charlight.com)
  - **Address Line 1:** 1234 Main Street
  - **Zip/Postal Code:** 28277
  - **State/Province:** NC
  - **City:** Charlotte
  - **Country:** USA
  - **Logon Id:** cladmin
  - **First Name:** Charlotte Lighting
  - **Last Name:** Admin
  - **Email:** [info@charlight.com](mailto:info@charlight.com)
  - **Password:** passw0rd
  - **Verify Password:** passw0rd
  - **Use Same Address as Organization:** Check Box (Yes)

The screenshot shows the RubyB2B website header with the logo, a search bar, and navigation links: All Categories, Fasteners, and Lighting. The main content area displays the 'Organization Registration' form. At the top of the form, there are two progress indicators: '1 Register your organization' (active) and '2 Register an administrator'. The form fields include: Organization Name\* (Charlotte Lighting Company), Email\* (info@charlight.com), Phone (optional), Address line 1\* (1234 Main Street), Address line 2 (optional), Zip Code / Postal Code\* (28277), Country\* (USA), State / Province\* (NC), and City\* (Charlotte). A dark button at the bottom of the form reads 'Next, register an administrator'.

3. Click Complete Registration
4. Click OK on registration received notification

The screenshot shows the 'Register an administrator' form on the RubyB2B website. The progress indicators at the top show '1 Register your organization' as complete and '2 Register an administrator' as the current step. The form fields include: Logon ID\* (info@charlight.com), First Name\* (Charlotte Lighting), Last Name\* (Admin), Password\* (masked with dots), and Email\* (info@charlight.com). There is a checkbox for 'Use same address as organization' which is checked. Below these are 'Account Preferences' for Preferred Language (United States English) and Preferred Currency (US Dollar). At the bottom are 'Back' and 'Complete Registration' buttons. A white modal dialog box is centered over the form with the text: 'Your registration request has been received. Your account is waiting for approval. Until your account is approved, you cannot log on.' and an 'OK' button.

### Step 3 – Approve Organization

1. Open Management Center from the Marketplace link
2. Menu > Manage Organizations > Approvals

- Preview Store

wcsadmin (wcsadmin)

## Approvals Authoring

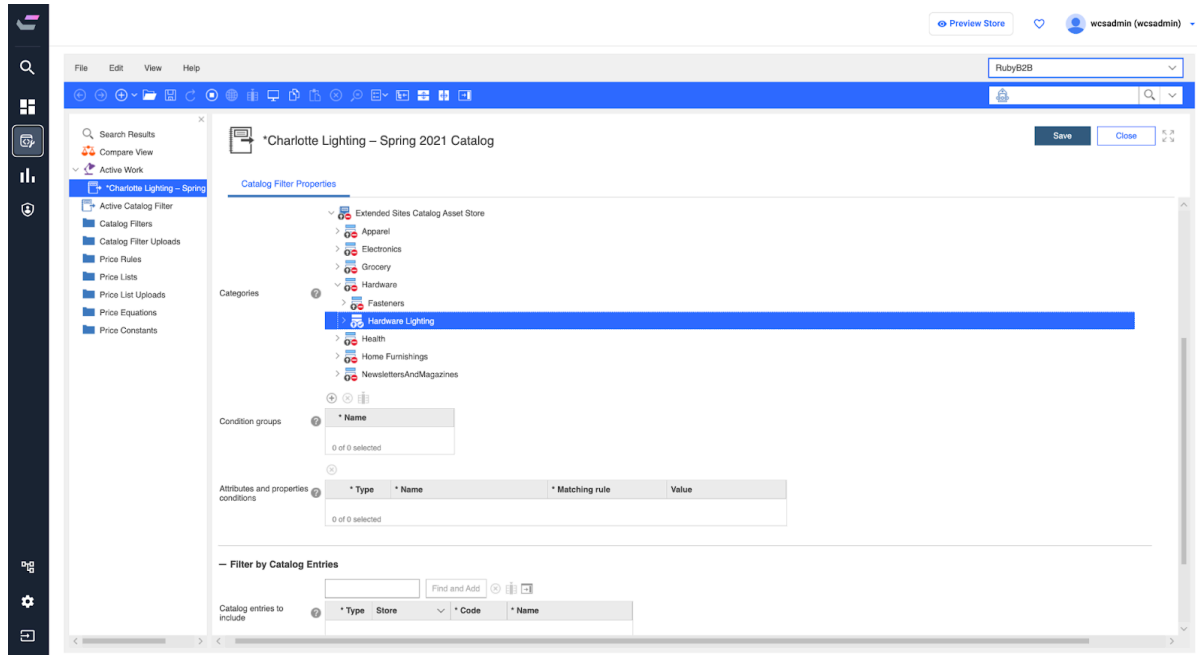
Show filters

Requestor	Entity ID	Approver	Approval Type	Status	Last Update	Actions
info@charlight.com (Charlotte Lighting Admin)	733333333333342335	wcsadmin (wcsadmin)	Organization registration	Pending	1/28/2025, 5:26:17 AM	<div><div></div><div></div></div>
info@charlight.com (Charlotte Lighting Admin)	3	wcsadmin (wcsadmin)	Buyer user registration	Pending	1/28/2025, 5:26:18 AM	<div><div>Approve</div><div></div></div>

Results per page 10 1 - 2 of 2

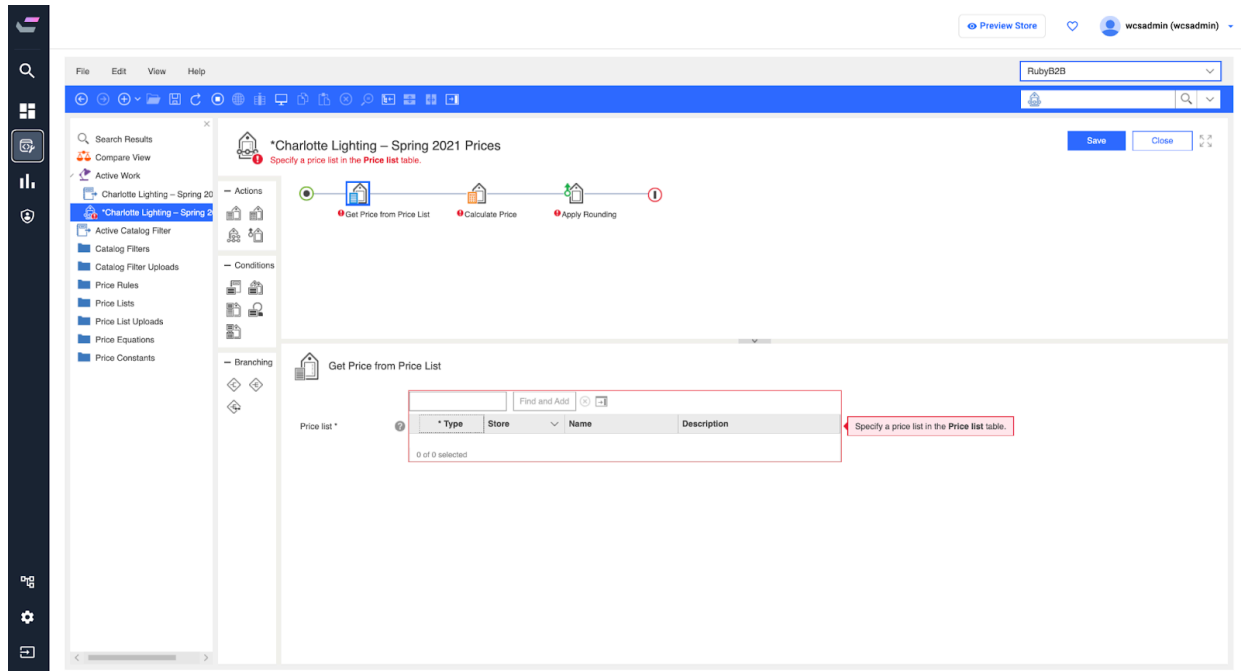
## Step 4 – Create Catalog Filter

1. In the Management Center Dashboard, under Manage Accounts click Catalog Filter and Pricing
  - a. From the store drop down on the top right, confirm you are using the “Ruby B2B” store
  - b. Right click “Catalog Filters’ from left menu and select “New Catalog Filter”
  - c. Complete Catalog Filter form with the following information:
    - i. Name: Charlotte Lighting – Spring 2021 Catalog
    - ii. Description: Charlotte Lighting contracted products
    - iii. Filter By Categories, Attributes, and Properties
      1. Expand category tree
      2. Right click on Extended Sites Catalog Asset Store and select “Exclude”
      3. Expand Hardware, right click on Hardware Lighting and select “Include”
  - d. Save > Close



## Step 5 – Create Price Rule

1. Right click "Price Rules" from left menu and select "New Price Rule"
  - a. Name: Charlotte Lighting – Spring 2021 Prices
2. From the Actions workspace, drag over the following items
  - a. Get Price from Price List, Calculate Price, and Apply Rounding
3. Select "Get Price from Price List" action
  - a. Enter "\*" in search box and click "Find and Add"
  - b. From result window, drag over "Extended Sites Catalog Asset Store"
4. Select "Calculate Price" Action
  - a. Select "Mark down price" radio button
  - b. Enter "25" for the Markdown%
5. Select "Apply Rounding" Action
  - a. Click checkbox for USD
  - b. Enter "\*.77" for the pattern
6. Click Save and Close



## Step 6 – Create New Account

1. In the Management Center Dashboard, under Manage Accounts click Accounts and Contracts
2. Click “New”
3. Complete form with following information
  - a. Account Details
    - i. Organization: Charlotte Lighting Company
    - ii. Click Next
  - b. Purchase Order
    - i. Click Next
  - c. Credit Line
    - i. Click Next
  - d. Payment and Billing
  - e. Check the following check boxes
    - i. Customer’s personal address book
    - ii. Customers parent organization’s address book
  - f. Shipping
    - i. Click the following check boxes
      1. Shipping Methods: MailShipping
      2. Shipping Charge Types: Shipping charged by seller
      3. Shipping Addresses:
      4. Charlotte Lighting Company: 1234 Main Street, Charlotte, NC, 28277, USA
    5. In Addition Section:
      - a. Customer’s personal address book
      - b. Customer’s parent organization’s address

Shipping

Select the shipping methods for the account

Search

☐ Select All (6)

☐ B2CExpress1

☒ MailShipping

☐ Pick up in store shipping policy

☐ Shipping policy for A1

☐ Shipping policy for A2

☐ Shipping policy for A3

SELECTED SHIPPING METHODS

MailShipping X

Select the shipping charge types for the account

Search

☐ Shipping charged by carrier

☒ Shipping charged by seller

SELECTED SHIPPING CHARGE TYPES

Shipping charged by seller X

Select the shipping addresses for the account

Search

☒ Charlotte Lighting Company: 1234 Main Street, Charlotte, NC, 28277, USA

SELECTED SHIPPING ADDRESSES

Charlotte Lighting Company X

In addition to the selected shipping addresses, a customer can use the shipping address from the following address books.

ii. Click on Finish

## Step 7 – Create Contract

1. From Accounts screen, click on the “0” under Contracts for Charlotte Lighting Company
2. Click New
3. Complete form with following information
  - a. Contract Details
    - i. Name: Charlotte Lighting - Spring 2021 Contract
    - ii. Description: Charlotte Lighting - Spring 2021 Contract
    - iii. Click check boxes for “Starts Immediately” and “No expiry date”
    - iv. Click Next
  - b. Participants
    - i. Available Organizations: Charlotte Lighting Company
    - ii. Click Next
  - c. Catalog filter and price rule
    - i. Catalog Filter: Charlotte Lighting – Spring 2021 Catalog
    - ii. Price Rule: Charlotte Lighting – Spring 2021 Prices – Sapphire
    - iii. Click next
  - d. Payment and billing
    - i. Click checkboxes for
      1. Customer’s personal address book
      2. Customer’s parent organization’s address book
    - ii. Click next
  - e. Shipping
    - i. Shipping Methods: Click checkbox for MailShipping
    - ii. Shipping Charge Type: Click checkbox for Shipping charged by seller

- iii. Shipping Addresses:
  - 1. Click checkboxes for
    - a. Charlotte Lighting Company
    - b. Customer's personal address book
    - c. Customer's parent organization's address book
- iv. Click next
- f. Click Finish
- g. Click on the 3 dots under Actions and click submit

#### **Step 8 – Verify Contract Pricing and Catalog Filter**

- 1. Open up RubyB2B Storefront from the Marketplace link
- 2. Click on Sign button at top right of screen
  - a. Login using cladmin | passw0rd
- 3. Verify that only the Lighting category is showing
- 4. Click on Lighting category to view the lighting products
  - a. Verify that all products are showing prices that are lowered 25% and end in .77