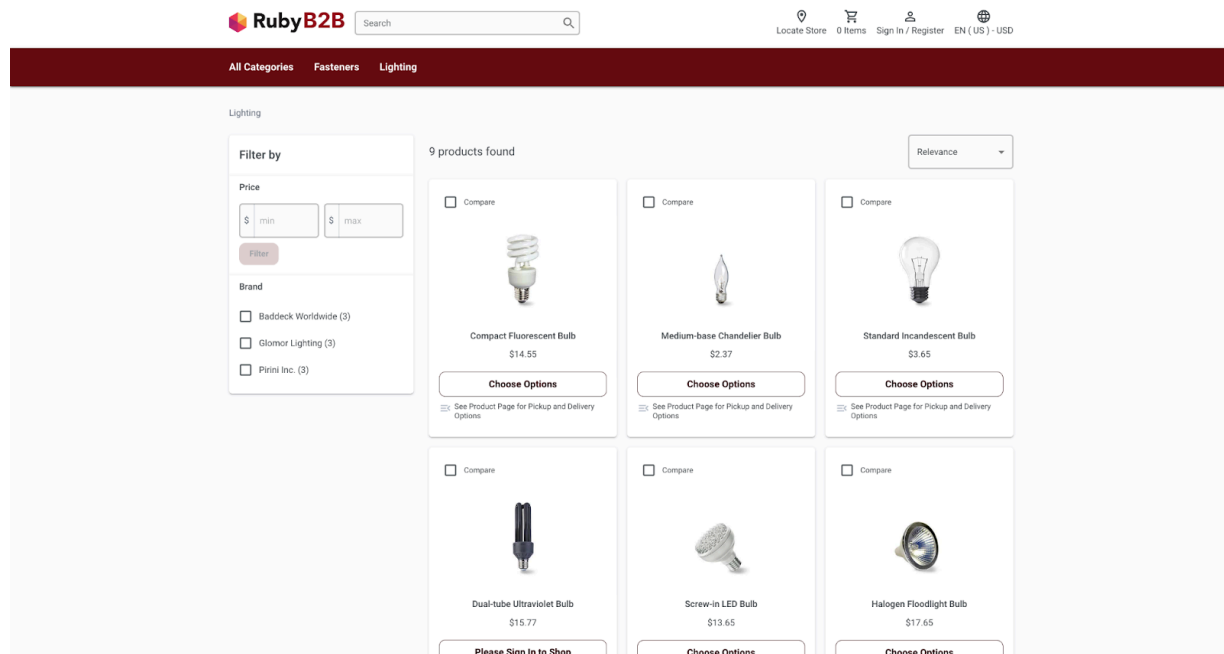# B2B Tutorial

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
   - **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
   - **Password:** passw0rd
   - **Verify Password:** passw0rd
   - **Use Same Address as Organization:** Check Box (Yes)

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

Step 3 – Approve Organization

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

a. Click on checkmarks to approve both the Organization and the User

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
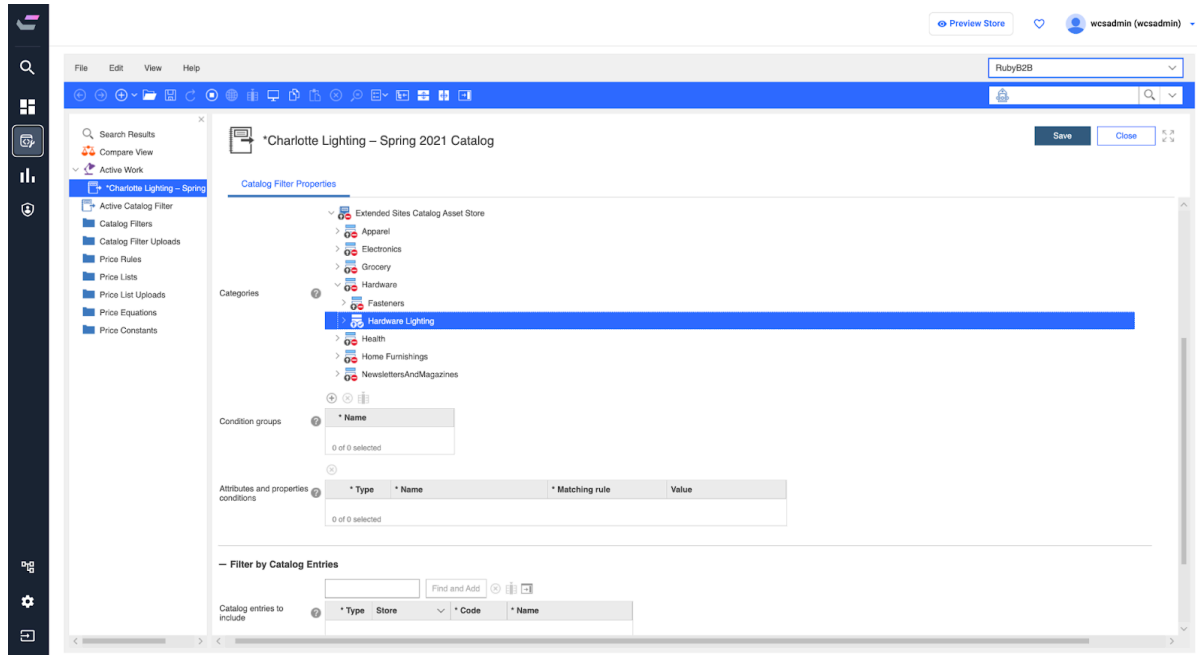
Step 5 – Create Price Rule

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
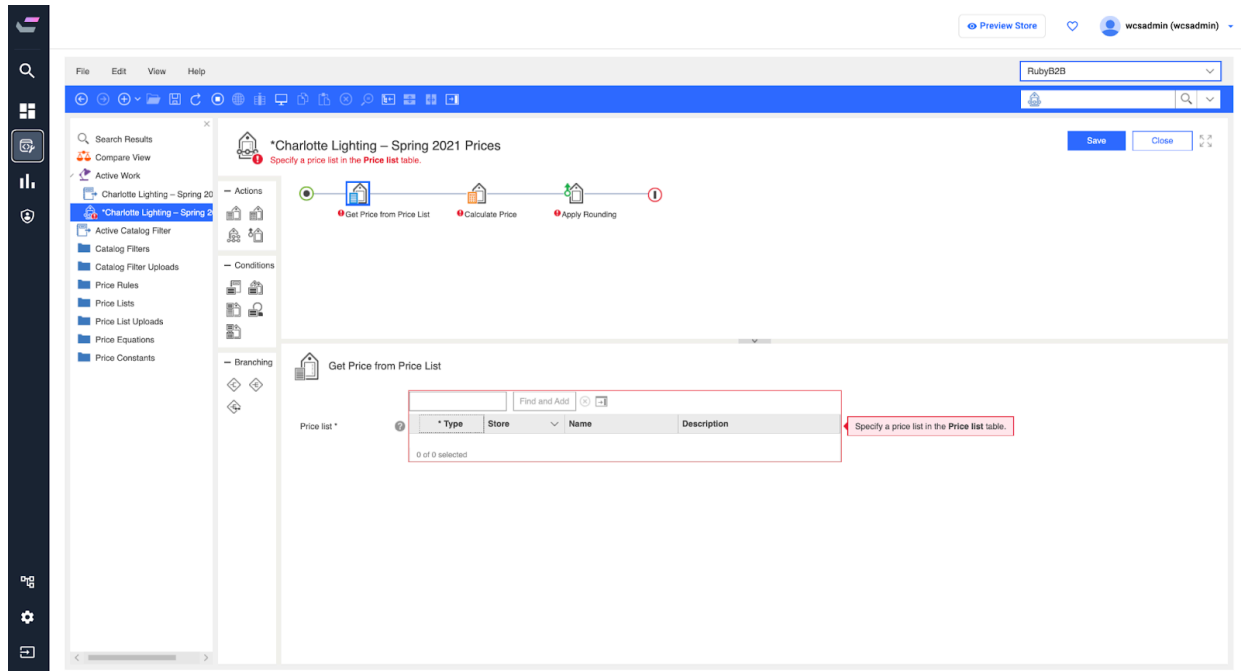
Step 6 – Create New Account

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

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