

Webshop User Registration Handling

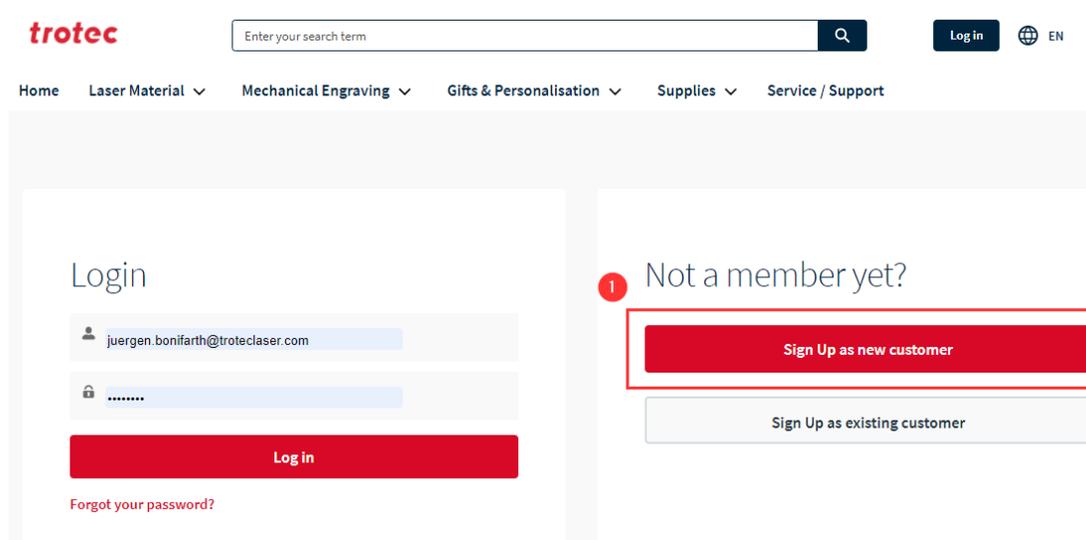
The webshop does offer **two variants of registration for new users** via the [shop](#) frontend:

New/Full customer registration: the user has to fill the full registration form providing a full set of company and contact information. These registrations will be shown in CRM as leads and have to be processed manually to enable the user logging into the shop and placing an order

Quick registration for active trotec customers: that special form just asks for few information to verify that we know the customer. The user fills in the information - if validation is positive, the user is created automatically without manual steps and the he immediately receives the user activation email and can login and start purchasing right after setting his password. If the validation does not succeed, the user has to use the full registration form for manual processing.

New/full customer registration

Starts with the user choosing the **Sign Up as a new customer** option **[1]** on the login/registration page



Webshop: new customer sign up

leading him to the full registration form:

Sign up

New Customer Existing Customer

1

Personal information

Salutation

Mr.

First Name *

Last Name *

Phone *

Email *

Company Information

Company Name *

If you already have an account with us,
please log in.

Already have an account?

[Go to Login](#)

Webshop: full registration form

On that form the user still can switch between New/Full Registration form and Existing Customer registration form by selecting the option at **[1]**.

1 [Terms & Conditions](#)

I accept the Terms & Conditions and Data Privacy Policy and confirm hereby that I am a commercial customer

2

All fields marked with an * are mandatory and have to be filled in.

Webshop: registration form submit

Webshop registration leads

After the user fills in the full registration form and accepts Terms & Conditions by checking **[1]** and clicking on Submit **[2]**, the registration will show up in CRM as a new lead in the consumables inbound lead queue just like any other consumables inbound leads like form fills on the website.

Lead
Mr. tpl demo 1 tpl demo 1 lastname

Company: tpl demo 1 | Title: | Phone (2): tpl demo 1 | Email: crm@troteclaser.com

Raw | Data validation

Details

Lead Information

Lead Name	B2B registration	Lead Record Type	Online Lead
Lead Owner	Thomas Pfanztler	Lead Status	Raw
Primary Source Campaign	Poland Webshop Registration	SBU	Consumables
Company	tpl demo 1	Language	English
Name	Mr. tpl demo 1 tpl demo 1 lastname	Email	crm@troteclaser.com
Title		Phone	tpl demo 1
Function		Mobile	

Webshop: full registration form lead

Webshop registration leads can easily be identified by following attributes:

Lead Name [1]: always is B2B registration

Primary Source Campaign [2]: set the your area's Webshop Registration campaign

This lead now has to be processed same like any other active inbound leads.

First step of course it to set the lead status from raw to Data validation!

1. Validate the lead data

find more info to lead validation [here](#)

2. check for duplicates/already existing accounts

Lead
Mr. Tester New Customer Test

+ Follow | Edit | Convert | Change Owner

Company: New Customer Test | Title: | Phone (2): 1234567 | Email: crm@troteclaser.com

✓ | Data validation | Converted | ✓ Mark Status as Complete

Details | Activity | Chatter

Lead Information

Lead Name	B2B registration	Lead Record Type	Online Lead
Lead Owner	Juergen Bonifarh	Lead Status	Data validation
Primary Source Campaign		SBU	

We found 2 potential duplicates of this Lead.
[View Duplicates](#) [1]

Campaign History
[View All](#)

Webshop registration lead: duplicate recognition

On the lead itself you will see potential duplicates. Just like normal active lead processing, please investigate the list of duplicates by clicking on **View Duplicates [1]** and remember the one if you found a fully matching existing account/contact record in the database to use in the convert dialog.

3. Convert the lead

Convert Tester New Customer Test

Account: Create New - OR - Choose Existing
Account Name: New Customer Test
Record Type: Prospect Account
Account Search: Search for matching accounts
0 Account Matches

Contact: Create New - OR - Choose Existing
Mr. Tester New Customer Test
0 Contact Matches detected

Opportunity: Create New - OR - Choose Existing
New Customer Test-
 Don't create an opportunity upon conversion
To find opportunity, choose an existing account

Cancel Convert

Webshop registration lead: conversion

If you found an existing duplicate account is existing please set the account under [1] "Choose existing" - to the same for existing contacts [2].

There is no Opportunity created, when creating a new webshop customer! So [3] check off the tick box and click on [4] convert when ready.

After that step you will have a new prospect account and contact representing the new webshop user and you can proceed with [activating the user for the webshop](#)

Activate user for the webshop

Having an account and contact for the new webshop user, either newly created by full registration lead or reusing existing data during lead conversion, you have to enable the account as a ecommerce buyer account and activate the user for ecommerce to access the webshop frontend.

With B2B commerce cloud a single account can have multiple users with own credentials to log into the shop, each user is always linked/represented by a account's contact.

The **username** always is the user's email address shown on the CRM contact.

Activate the account and contact for Commerce

first open the account and activate the account as a buyer account

Account: New Customer Test
+ Follow Edit Cons potential checked Create Subaccount Perform Allocation

There is no dunning info available.

We found no p of this Account

Details Related Sales Service B2B

Account Name	New Customer Test	Account Record Type	SAP Customer
Account Name 2		Search Term	
Parent Account		SAP Customer Number (User)	9999123456
		Phone	

Activity: Enable As Buyer

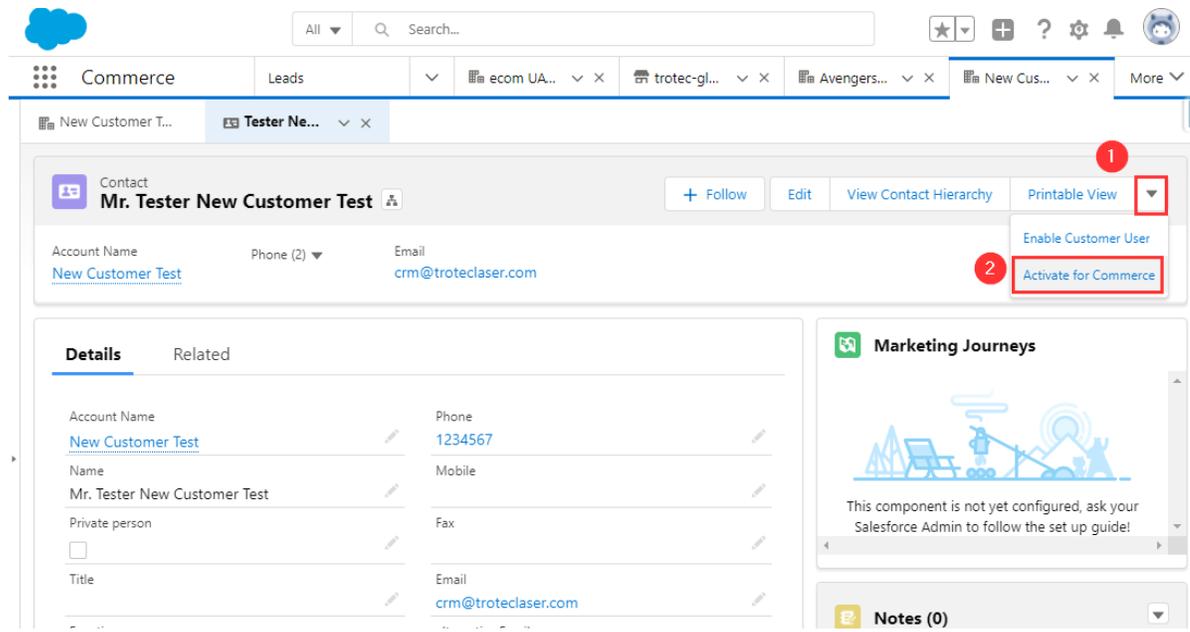
Filters: All time • All activities • All types
Refresh • Expand All • View All

Upcoming & Overdue: No next steps. To get things moving, add a task or set up a

webshop: enable account as buyer

Please be aware, that enabling as buyer only works on SAP customers - so the account has to be [linked with SAP](#) first!

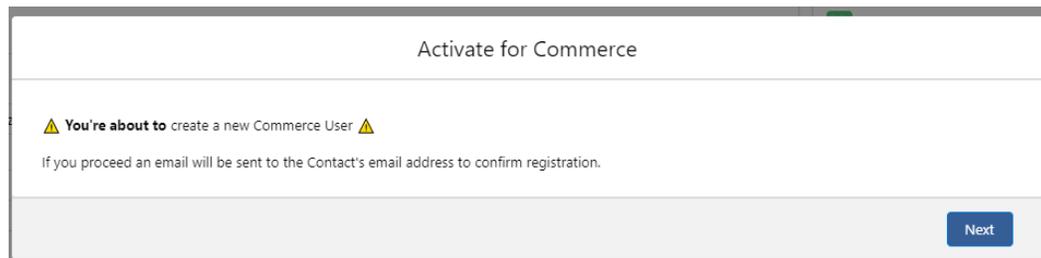
After Account enabling open the contact of the designated webshop user (usually the new contact you did create during conversion of the registration lead or the existing contact you did use in the conversion dialog).



Webshop: activate the B2B commerce user

Open the **actions [1]** and click **Activate for Commerce [2]**

You need to confirm this step in a alert window:



Webshop: user activation - warning on activate for commerce

This action will create a webshop user and trigger the user activation email to be sent to the contact's email address which also will be the username of the new user.

This email will include a link for the new user setting his password.

*This link is a one time use link only (so once clicked it will not work anymore, no matter, if a password was set and the process was finished or not) and **will expire after 7 days.***

Showing discounted prices to a user

After the user did activate himself by setting a password via the link in the activation email, he can log into the shop, **see list prices**, fill the cart and checkout his cart to place an order.

If you want the user to see discounted prices, you have to:

1. Link the salesforce account to a SAP account and so make him to a SAP Customer account in salesforce
2. Set the pricing conditions in SAP matching one of the defined area's price discount groups
3. Move the account from the default buyer-group (showing list prices) to the proper buyer-group showing discounted prices:
[Assign account to proper buyer-group](#)

Once a user's sf-account is linked to a SAP-account, you can change SAP price-conditions and move the account to a different B2B buyergroup any time.

Assign account to proper buyer-group

This step is important for TPL in the MVP until SAP is extended to support pricegroups for salesorg 0029, so it is a temporary thing only! After SAP adaption, the webshop account's buyer-group is set via SAP integration based on the SAP pricegroup!

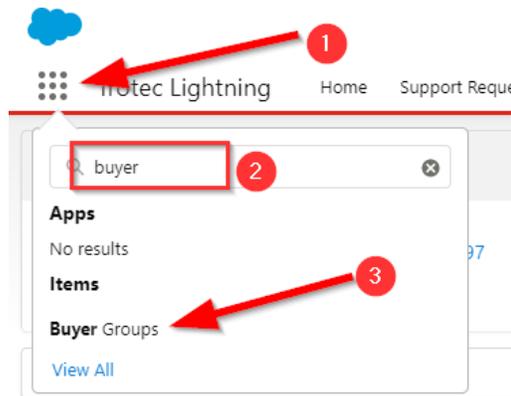
For each customer discount group there is a dedicated **B2B commerce buyer-group**, to which the account has to be assigned in order to show correct prices in the shop catalog and values from a cart match checkout values (that are being retrieved from SAP).

TPL did define 7 discount groups in SAP that are set on the SAP accounts by defining proper pricing conditions. Aligned to these 7 SAP discount definitions there is 7 buyer-groups available in salesforce CRM. The buyer-group names match the discount levels and look like TPL 12% discount, TPL 15% discount and so on.

When creating a SAPaccount for a webshop account to process a new customer's first webshop order, the account needs to have pricing conditions following the discount rules defined. After creating the SAP account properly, the buyer-group of the salesforce account has to be changed from the default list-price buyer group to the proper one matching the SAP discount levels manually.

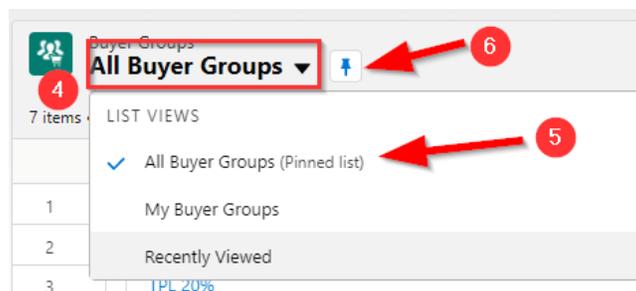
This only is required if the SAP account has special pricing conditions set. By default all new webshop buyer accounts are assigned to the area's default buyer-group that is showing list prices in the webshop!

Please follow this guide to assign the account to the non-default list-price buyer-group but a discount pricing buyer-group:



Webshop: show account buyer-groups

- [1] open the salesforce app-launcher
- [2] search for buyer groups
- [3] click on Buyer Groups to open the buyer-groups listview



Webshop: show account buyer-groups listview

- [4] now switch listview from the default **Recently Viewed** (that might be empty until you have did open buyer-groups before)
- [5] to the **All Buyer Groups** listview
- [6] if you want to have the **All Buyer Groups** listview opened by default you can pin it by clicking here

After clicking on the selected buyer-group's name, switch to the Related tab [7]

Buyer Group
TPL 15%

Description Owner Name
Thomas Pfanzerler

Related 7 Details

Price Books (1) Assign

Price Book	Priority	Is Active	Valid From
TPL B2B 15%		<input checked="" type="checkbox"/>	
View All			

Buyer Group Members (1) Assign 8

Buyer Name
ecom UAT TPL 15%
View All

Webshop: assign account to buyer-group

- [8]** click on **Assign**
- [9]** either search for the account before or, if it is visible already,
- [10]** click on the + button in front of the name and
- [11]** click **Assign** to finish

Assign Buyer Accounts

9

+ New Account

0 items selected

<input type="checkbox"/>	Account Name	Phone	Street	Zip/Po...	City	Country	Accoun...	RSP Consumables	RSP Laser	SAP Custo...
<input type="checkbox"/>	+	568192797	PINOKIA	07-210	WYSZKÓW	Poland	bsalw			133655
<input type="checkbox"/>	+ Dorota Sp zoo	600600600	Woronicza 17	02-366	WARSZAWA	Poland	tp	Thomas Pfanzerler	Thomas Pfanzerler	
<input type="checkbox"/>	+ ecom UAT TPL 20%		25 Redutowa	01-103	Warszawa	Poland	tp	Thomas Pfanzerler	Thomas Pfanzerler	133650
<input type="checkbox"/>	+ ecom UAT TPL 25%		21 Redutowa	01-103	Warszawa	Poland	tp	Thomas Pfanzerler	Thomas Pfanzerler	133651
<input type="checkbox"/>	+ Fanta4		Musterstr	12345	Warszawa	Poland	krawieck	Karina Krawiec	11 Karina Krawiec	
<input type="checkbox"/>	+ Fanta5	170132424	Polish street 1	11223	Warschau	Poland	krawieck	Karina Krawiec	Karina Krawiec	

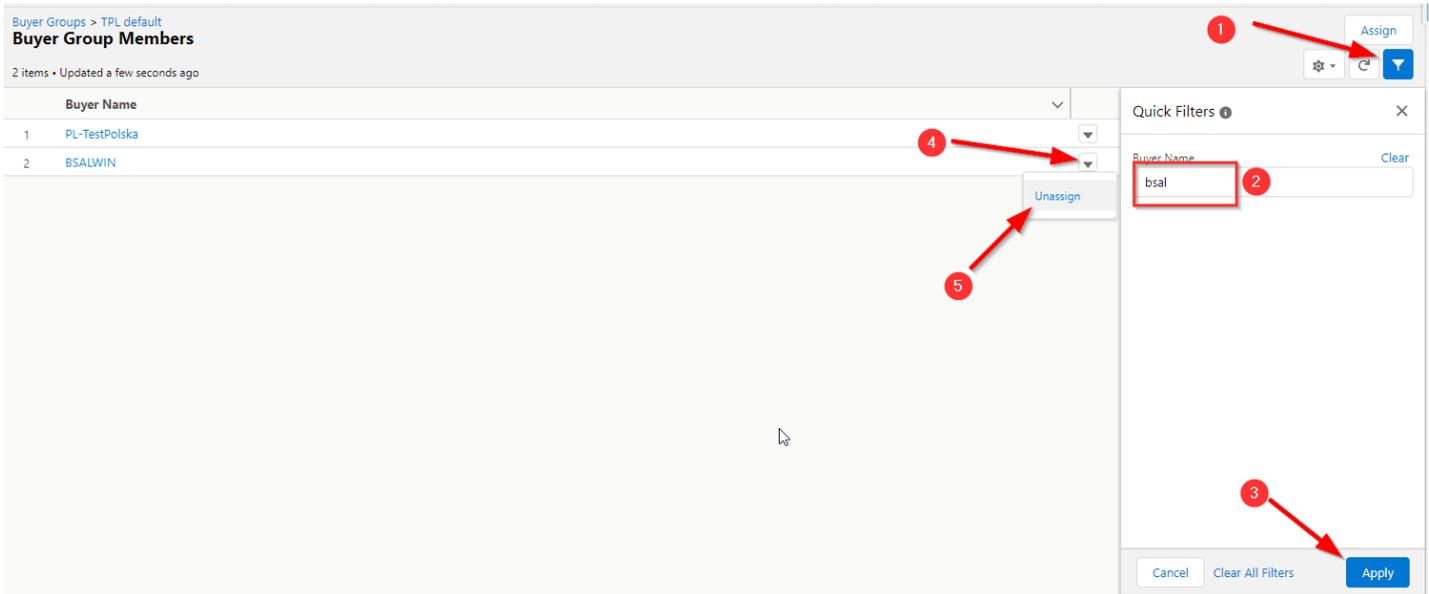
Cancel Assign

Webshop: assign account to buyer-group - select account

You could process multiple accounts in this step by searching and hitting the + button on multiple lines
After doing that the account(s) will be listed as **Buyer Group Members** on the related tab of the buyer-group.

Remove account from TPL default buyer-group

Final step is to remove the account from the default buyer-group TPL default by:
opening this buyer-group, switch to the **Related** tab, click on **View All** in the **Buyer Group Members** section
now you either can see the account name already or need to filter by hitting the filter button **[1]** and type the name **[2]** and hit **Apply [3]**



Webshop: remove account from buyer-group

click the menu-symbol [4] in the name's line and hit `unassign` [5]

Existing customer quick registration

If an existing trotec customer (either laser or "offline" consumables or both) want to register to the webshop, a quick existing customer registration form can be used for convenience.

This form does not require all company and contact data to be entered, but does a CRM data validation based on the entered contact email and customerID (that usually can be found on trotec invoices sent to our customers).

This process is only available for selected areas!

4. Link salesforce account to SAP account

To enable a new webshop user for shopping the salesforce account does not need to be linked to a SAP account.

But once the user does place his first order by finishing the checkout process, linking the sf-account to a SAP account is mandatory and required to proceed with order processing. An order placed by a non-SAP-account user is stored in a salesforce Order Summary with status pending showing that it is waiting to be transferred to SAP. Once the account link is established, the Order Summary's status is changed to Processed and sent to SAP showing up as a new order. Once the transfer is finished you will find the SAP orderID on the Order Summary Details tab:

Order Summary		00000511		+ Follow New Note Edit	
Account	Ordered Date	Status	Billing Address	Sales Channel	Tax Locale Type
ecom UAT TPL 25%	7/23/2021 10:31 AM	Processing	21 Redutowa Warszawa, 01-103 Poland		

Summary	Related	Details	Feed
Order Summary Information			
Original Order	00000511	Order Summary Number	00000511
Ordered Date	7/23/2021 10:31 AM	Status	Processing
Account	ecom UAT TPL 25%	Owner Name	User2 Test2
Sales Channel		Sales Store	trotec-global
Order Life Cycle Type	Unmanaged	Iso Currency	PLN - Polish Zloty
Description		Tax Locale Type	
B2B Payment Methods	Purchase Order	ERP Order Id	0104349425

B2B Order Summary: ERP Order Id

You can use the value of the ERP order Id for example in SAP VA03 to check and process the order in SAP to finally supply goods to the customer.

If it is an existing account and there already is a link to SAP account (having SAP# and recordtype i.e. SAP Customer), you are done with this step.

Otherwise please follow the process shown [here](#).

It is very important that the SAP account has defined pricing conditions set so there is a match of prices between the webshop catalog and the SAP calculation done in checkout and order processing!

If you want to enable the webshop user only for online payment, please use **payment condition Z320** in sap! any other payment condition will show the PO (purchase order) option on checkout additionally!

You can only proceed once the account is shown as SAP Customer or Non SAP Customer!