Webshop User Registration Handling

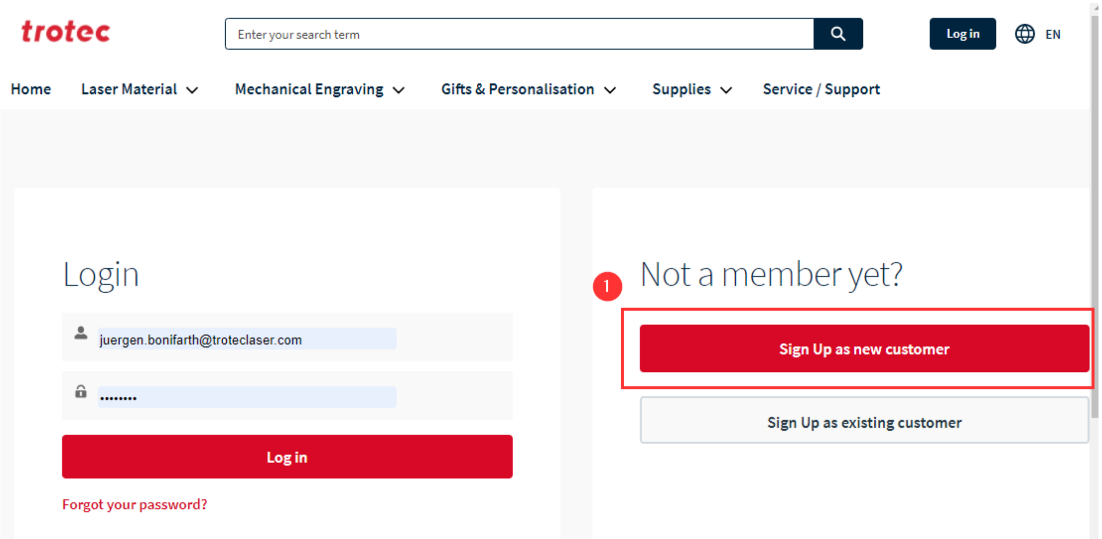
The webshop does offer **two variants of registration for new users** via the shop frontend:

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.

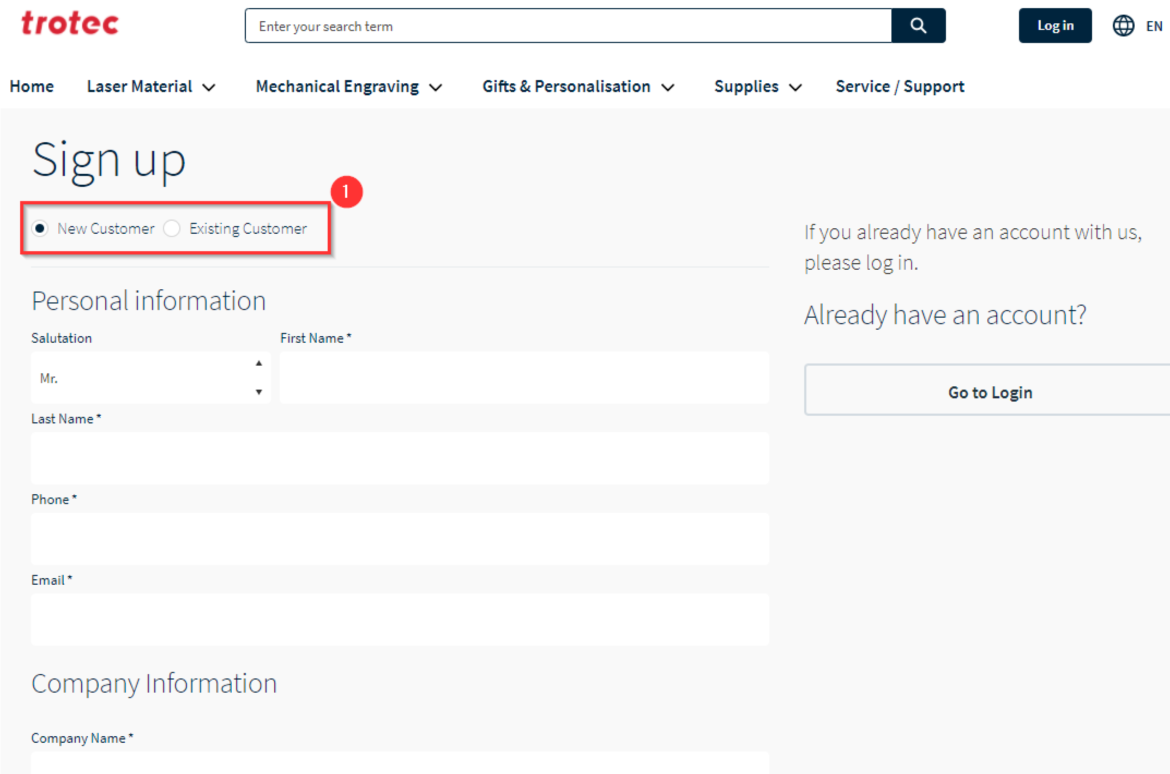
New/full customer registration

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



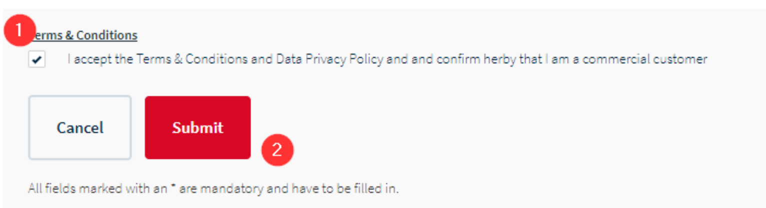
Webshop: new customer sign up

leading him to the full registration form:



Webshop: full registration form

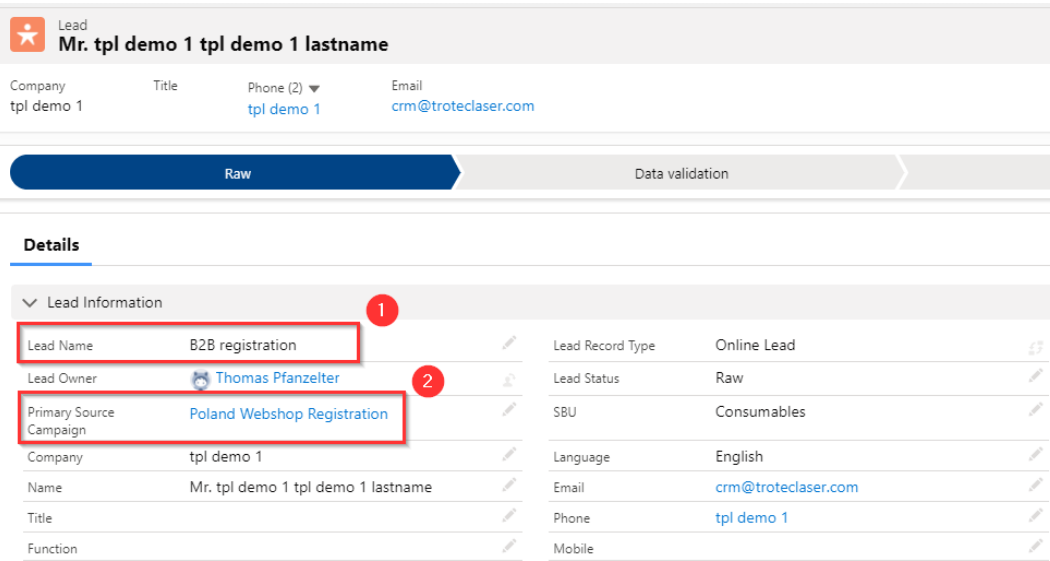
On that form the user still can switch between New/Full Registration form and Existing Customer registration form by selecting the option at **[1]**.



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.



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

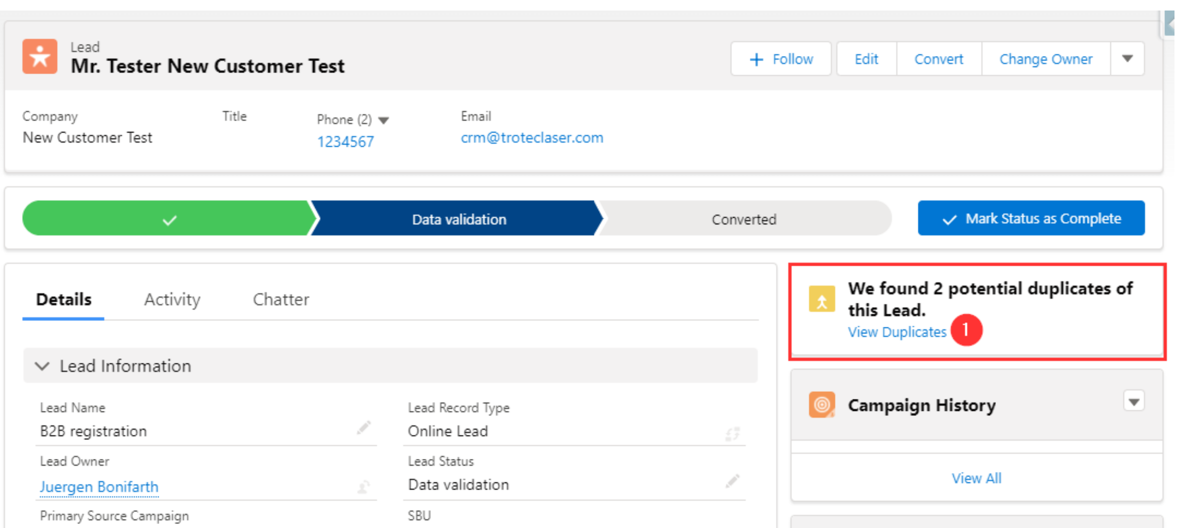
This lead now has to be processed same like any other active inbound leads.

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

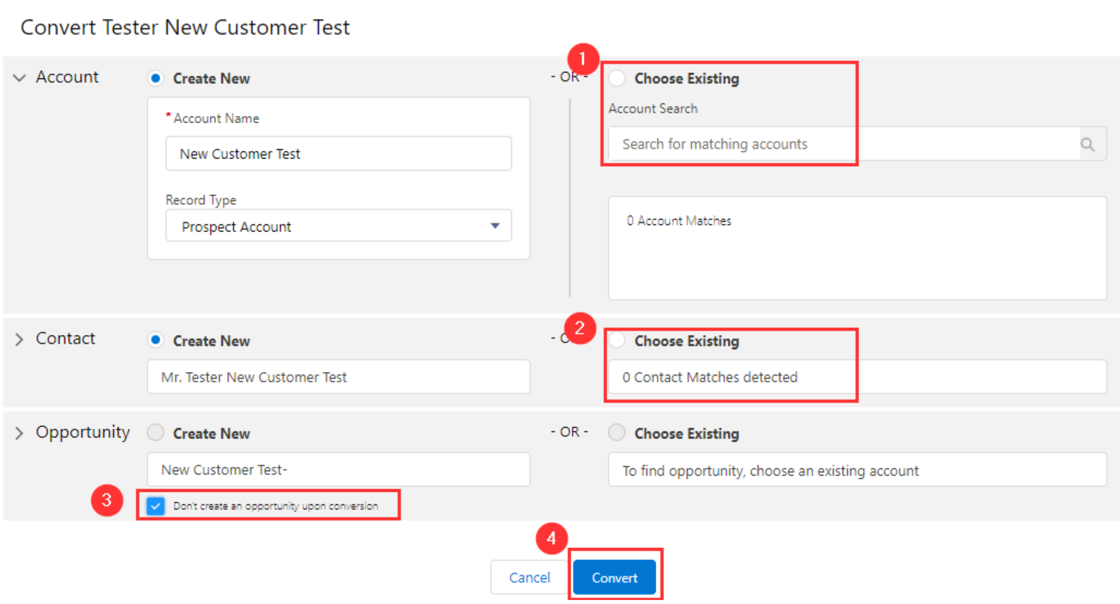
2. check for duplicates/already existing accounts



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



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 proospect account and contact representing the new webshop user and you can proceed with activating the user for the webshop

Activate user for the webshop

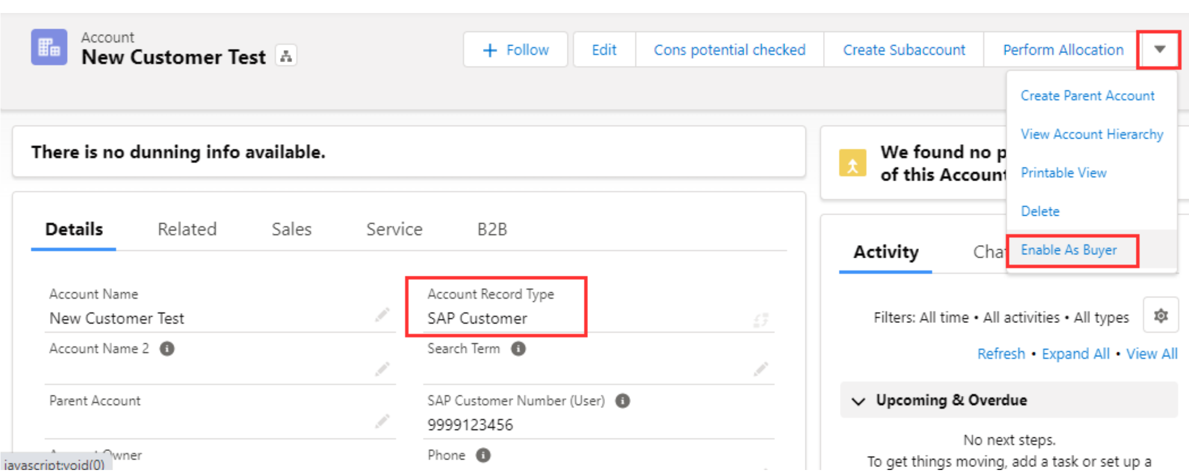
Having an account and contact for the new webshop user, either newly created by full registration lead or reusing existing data during lead conversion, you have to enable the account as a ecommerce buyer account and activate the user for ecommerce to access the webshop frontend.

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

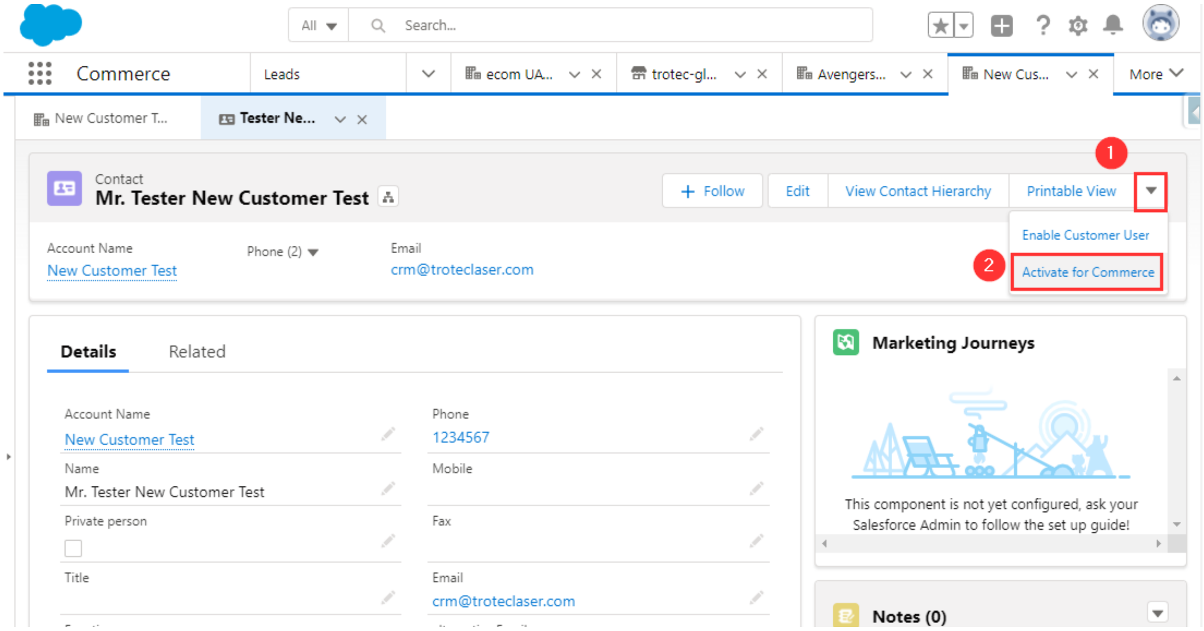
first open the account and activate the account as a buyer account



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!

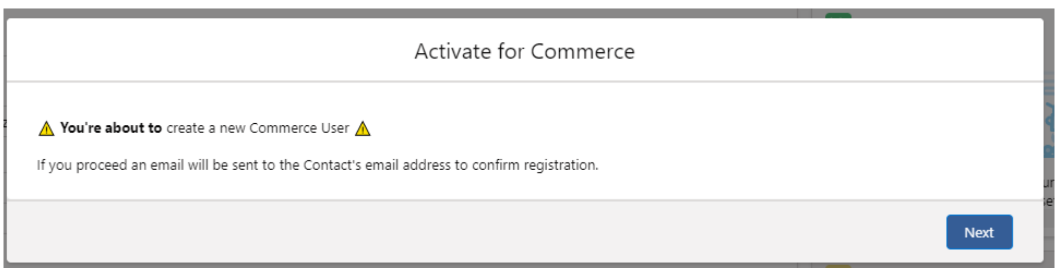
After Account enabling open the contact of the designated webshop user (usually the new contact you did create during conversion of the registration lead or the existing contact you did use in the conversion dialog).



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**.*

Showning 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!

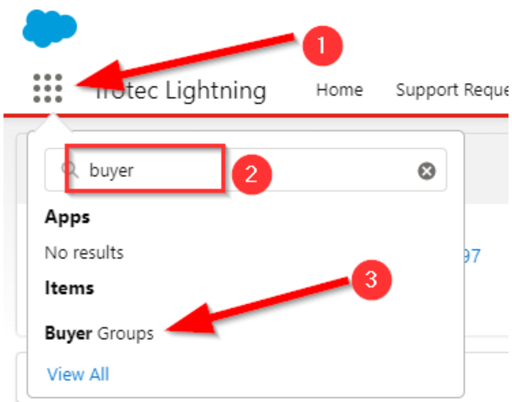
For each customer discount group there is a dedicated **B2B commerce buyer-group**, to which the account has to be assigned in order to show correct prices in the shop catalog and values from a cart match checkout values (that are being retrieved from SAP).

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.

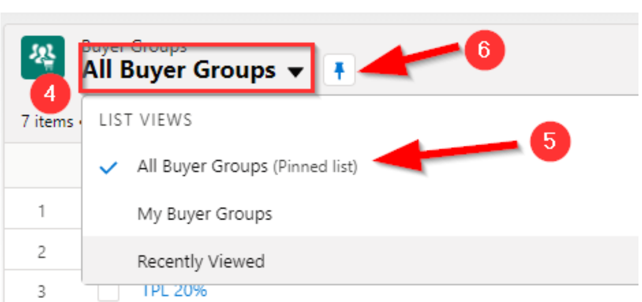
This only is required if the SAP account has special pricing conditions set. By default all new webshop buyer accounts are assigned to the area's default buyer-group that is showing list prices in the webshop!

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

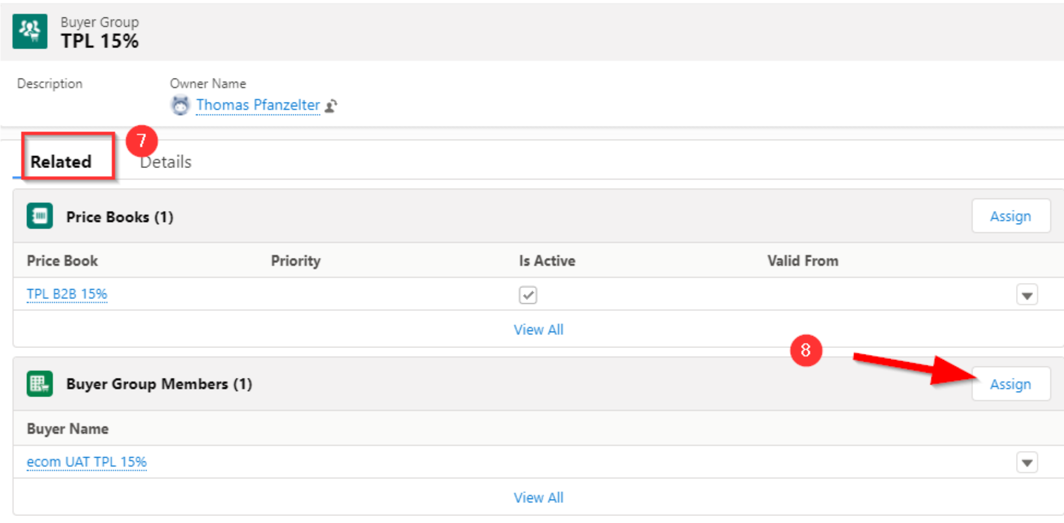
[1] open the salesforce app-launcher
[2] search for buyer groups
[3] click on Buyer Groups to open the buyer-groups listview



Webshop: show account buyer-groups listview

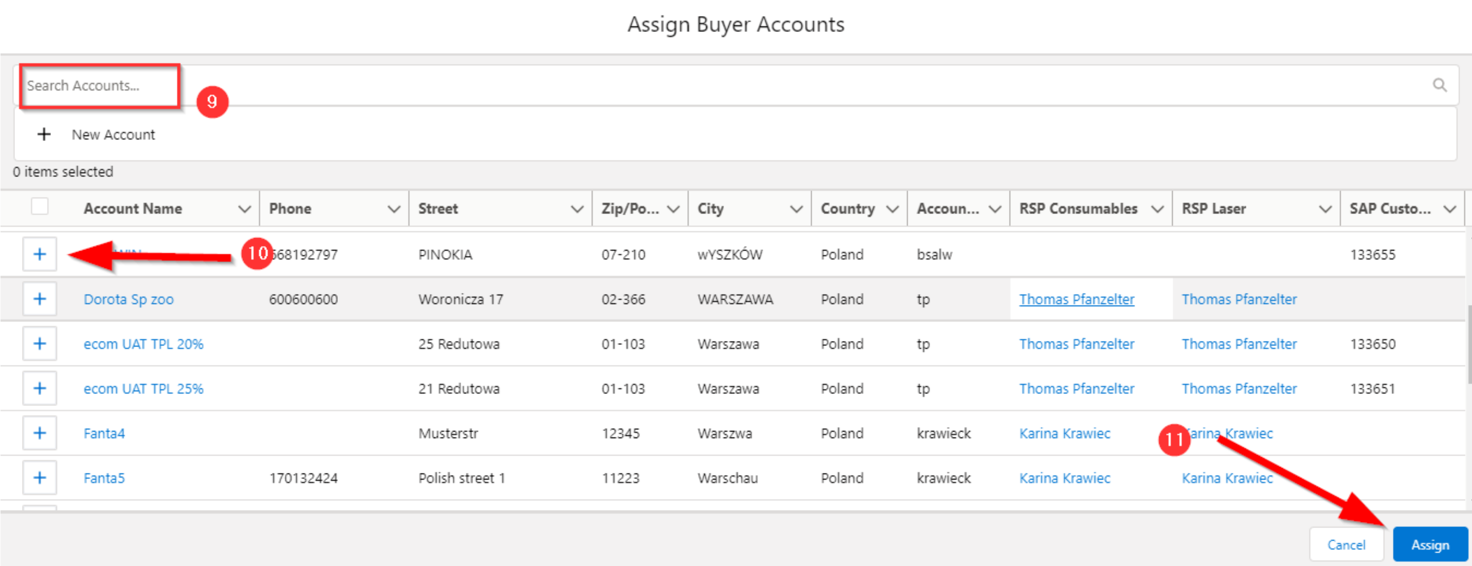
[4] now switch listview from the default `Recently Viewed` (that might be empty until you have did open buyer-groups before)
[5] to the `All Buyer Groups` listview
[6] if you want to have the `All Buyer Groups` listview opened by default you can pin it by clicking here

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



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 infront of the name and
[11] click `Assign` to finish



Webshop: assign account to buyer-group - select account

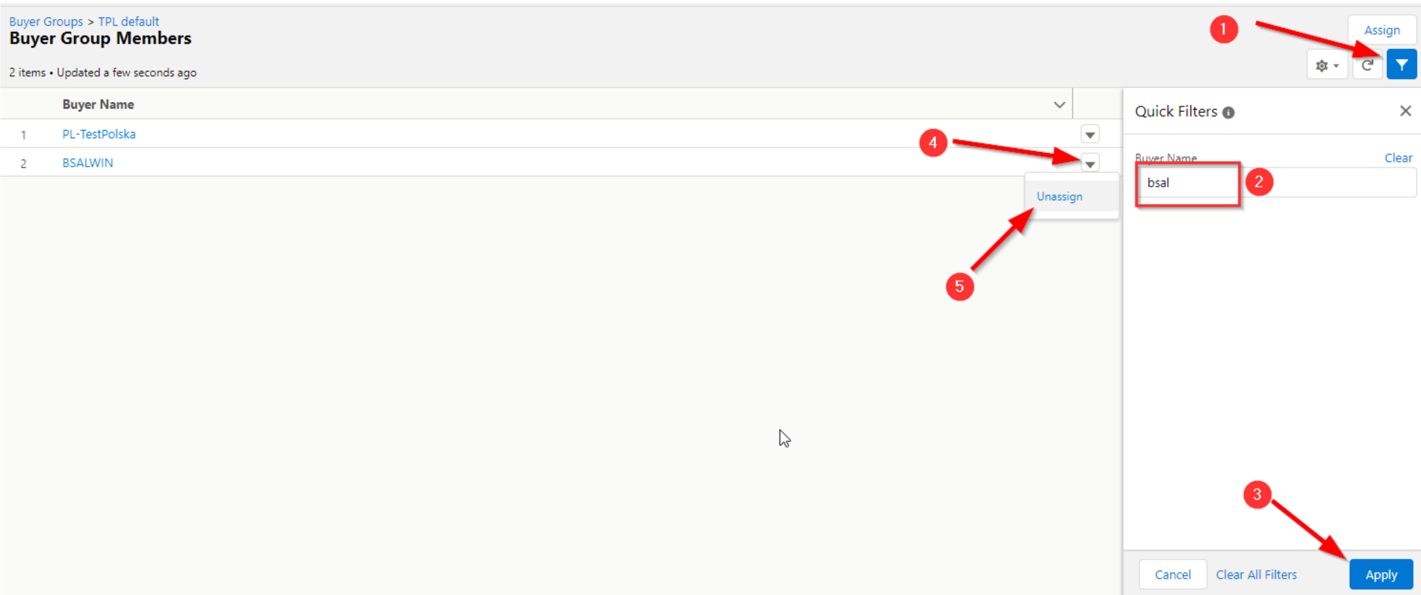
You could process multiple accounts in this step by searching and hitting the + button on multiple lines

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.

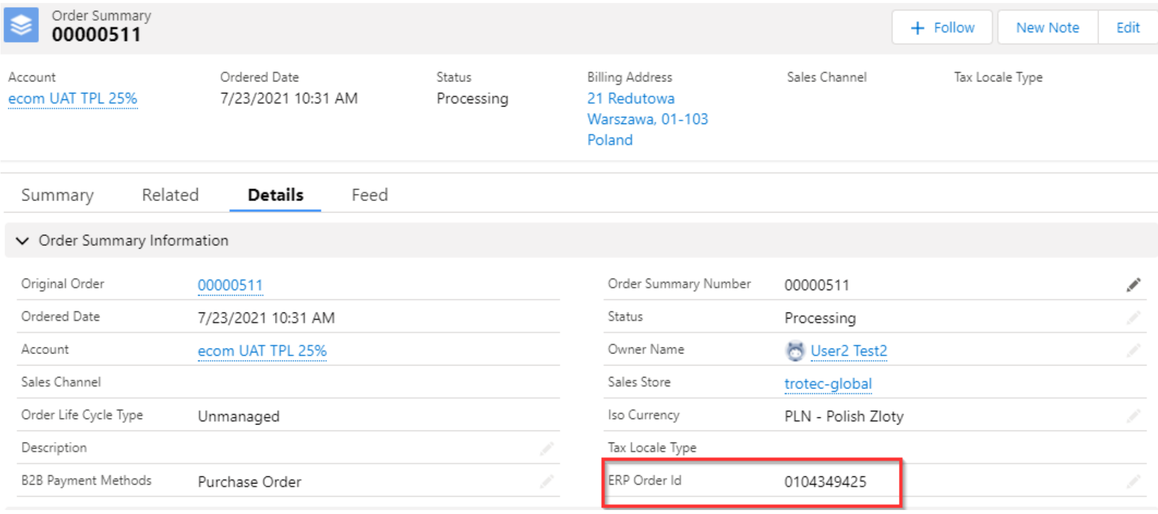
This form does not require all company and contact data to be entered, but does a CRM data validation based on the entered contact email and customerID (that usually can be found on trotec invoices sent to our customers).

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:



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`!