WHOLESALE B2B

Turn PrestaShop into professional wholesale platform, wholesale registration, wholesale levels with particular discounts and rewards, loyalty rewards, quick order table and more!

A product of PrestaHero

Contents

I.   WELCOME

Thank you for purchasing our product. We hope to guide you through all the aspects of the module installation and the module setup within this document. If you have any questions that are beyond the scope of this documentation, please feel free to contact us.

Note:

All instruction screenshots are taken from PrestaShop 1.7, but installing and configuring this module on PrestaShop 1.6 is similar.

II.   INTRODUCTION

Wholesale B2B is the must-have module for any PrestaShop store that is doing wholesale. It is a simple, easy to use **PrestaShop wholesale module** that lets you focus on growing the business and attracting more wholesale customers!

Wholesale B2B module is everything you need to integrate the wholesale solution into your PrestaShop online store. Easy to manage retailer levels, promoted products, rewards, etc. and encourage shoppers to spend more to get greater discounts.

** "**Wholesale B2B**" is compatible with PrestaShop 1.6.x, PrestaShop 1.7.x and PrestaShop 8.x*

III.   INSTALLATION

1. Navigate to **"Modules / Modules & Services",** click on **"Upload a module / Select file".**
2. Select the module file **"ets_wholesale.zip"** from your computer then click on **"Open"** to install.

3. Click on "**Configure**" button of the module you just installed to open the module's configuration page.

Quick access: You can also navigate to **Wholesale B2B**'s configuration page through the quick access menu.
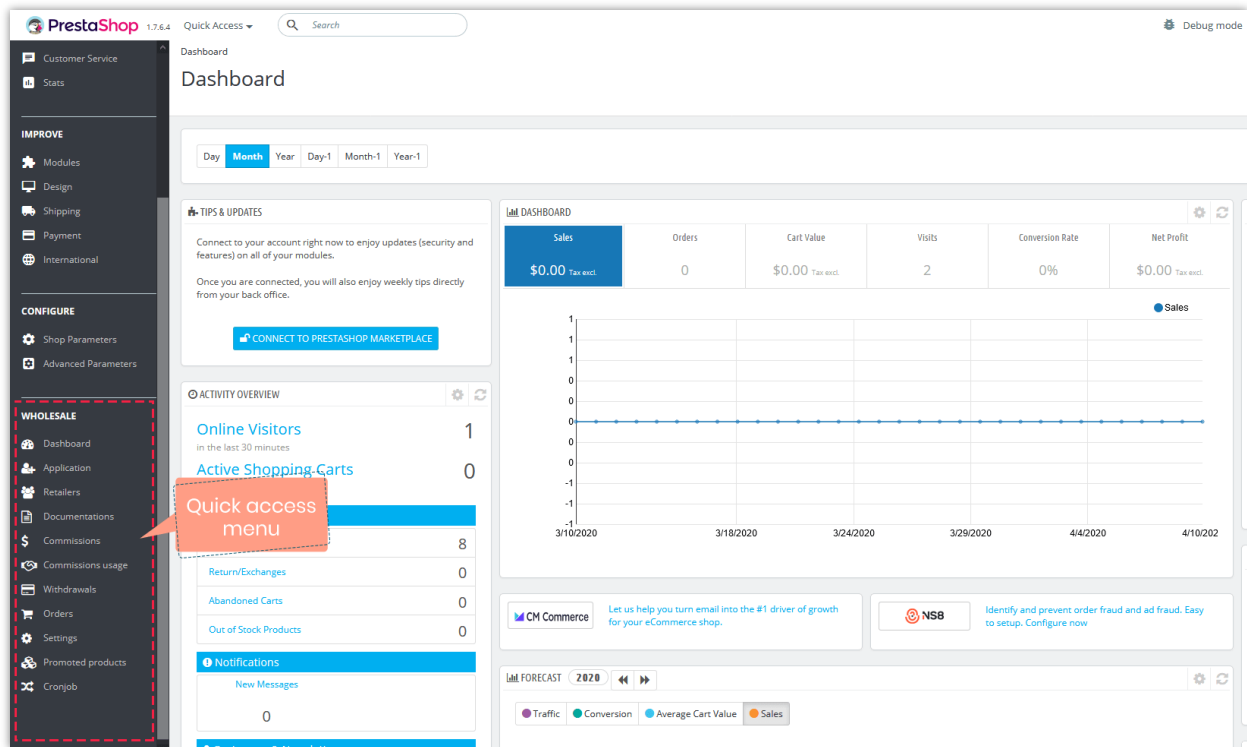
After successfully installing **Wholesale B2B** module, let's configure all necessary elements to run wholesale program on your store!

By default, after you successfully installing **Wholesale B2B** module, the wholesale system is enabled on your PrestaShop store. Firstly, we will configure wholesale levels for your future customers.

1. Wholesale levels

Wholesale B2B allows store admin to add an unlimited number of wholesale level with different reward rate and condition. Wholesale customers will be automatically put into a new level when they satisfy the level conditions.

Click on "**Customers > Wholesale levels**" to set up wholesale levels for your wholesale program.

By default, **Wholesale B2B** has already created a "Starter" wholesale level for you. You can add new level or edit the default level (edit level name, discount rate, etc.).

Click on "**Add new level**" icon to add a new wholesale level > Set up the condition for the wholesale level > Click "Save".

2. Wholesale conditions

From module's configuration page, select "**Settings > General**" menu to be navigated to "**General**" page.

Default wholesale level: select a default wholesale level for freshly registered wholesale customers.

Quick order table: when wholesale customers click on "Wholesale" button to buy wholesale products, a quick order table will appear and allow wholesale customers to buy product with different features/attributes in large quantity.
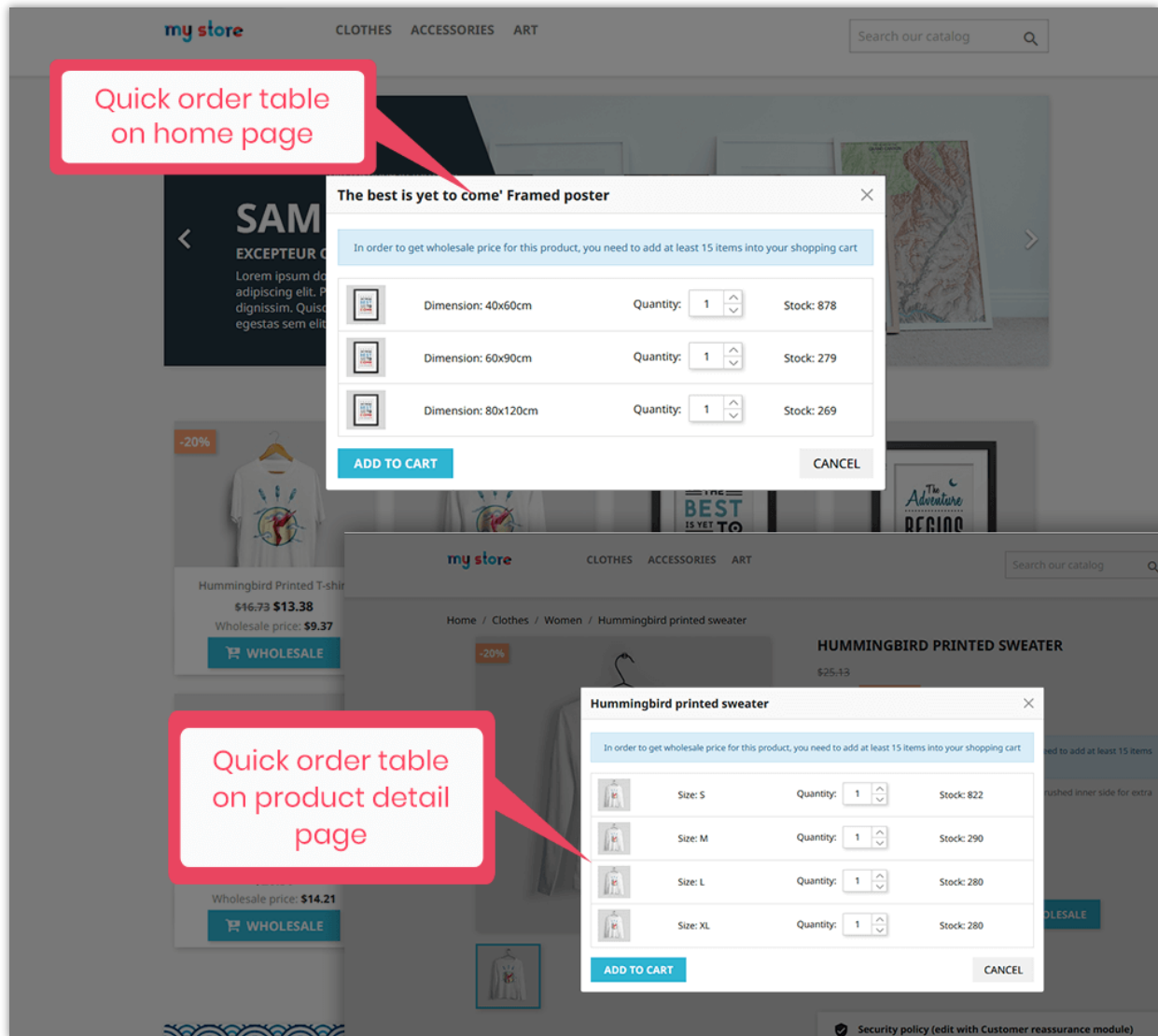
3. Registration

Registration form: customers will have to submit a registration form with the required information and waiting for approval from store administrator to become a wholesale customer. You can add unlimited number of fields to registration form.

Require customers to submit additional information: you can require customers to provide more information before approving their application. Add as many fields as you want to gain information from customers.

Finally, click "**Save**" to apply your configuration.

4. Email settings

On this page, you can set up the email addresses you want to receive notification email from **Wholesale B2B** module. Enter email addresses separated by a comma (",") if you want to send notification messages to more than 1 email.

5. Cronjob settings

You may set up a **cronjob** on your server to *automatically change wholesale level of wholesale customer and update reward status.*

To set up cronjob feature, please navigate to "**Cronjob**" page.

Wholesale B2B also allows you to save cronjob log for debug purpose.

6. Wholesale customer list

On "**Customers > Wholesale list**" page, store admin can view and manage the wholesale customer list.

| | Dashboard | Customers ˅ | Rewards | Withdrawals | Orders | Applications ❶ | Promotion | Documentation | Settings ˅ |

🏠 > Customers > Wholesale list

WHOLESALE LIST (4)

ID ▼▲	Wholesale customer name ▼▲	Wholesale customer email ▼▲	Wholesale level ▼▲	Wholesale customer account status ▼▲	Action
				‑‑	🔍 Filter
11	Anna Smith	anna.ets@gmail.com	Starter	✓	🔍 View ˅
10	Helen Le	hienletest01@gmail.com	Level 3	✓	🔍 View ˅
9	Freya Test	freyatest@gmail.com	Level 1	✓	🔍 View ˅
4	demo demo	demo@demo.com	Level 3	✓	🔍 View ˅

Showing 1 to 4 of 4 (1 Page)

✏ Edit
🗑 Delete

Dashboard | Customers ∨ | Rewards | Withdrawals | Orders | Applications ❶ | Promotion | Documentation | Settings ∨

🏠 > Customers > Wholesale list

WHOLESALE

The current wholesale level and the discount rate that applies to a wholesale customer when he/she purchase products

Whole...
Wholesale customer email demo@demo...m
Registration date 2020-08-11 ...:28:47
Wholesale level Level 3
Discount 20.00%

Reward range	Starting at (units)	Reward value
	1	1%
	6	3%
	11	10%
	20	15%
	30	20%
Configure reward ranges		

The product quantity ranges and reward value which wholesale customers will earn if they purchase a quantity belongs to these ranges

Status Enabled

👁 View application
⊘ Disable wholesale customer account   🗑 Delete

Automatically change level when eligible ON

Order total ❓ $3,806.24
Total reward balance ❓ $280.39
Total reward ❓ $348.89
Withdrawn ❓ $42.00
Paid for orders ❓ $0.00
Converted to voucher ❓ $26.50
Total used ❓ $68.50

MODIFY WHOLESALE CUSTOMER BALANCE

Action   Deduct
Amount   [   ] $
Reason   Deducted by admin

⊖ Deduct

Admin can manually add or deduct reward balance of retailer

REWARDS 40

ID	Order ID	Note	Product price	Product quantity	Reward	Status	Date	Action
			Min / Max	Min / Max	Min / Max	--	From / To	🔍 Filter
U-11	--	Converted into voucher #KM3QVIIC	--	--	-$10.00	Deducted	11/05/2020 21:41:57	↺ Refund ▾
U-10	--	Withdrawn (PayPal, ID withdrawal: 7)	--	--	-$10.00	Deducted	11/05/2020 21:41:11	↺ Refund ▾
U-9	--	Converted into voucher #WPS2IN4W	--	--	-$10.00	Deducted	11/02/2020 04:05:39	↺ Refund ▾
U-8	--	Withdrawn (PayPal, ID withdrawal: 6)	--	--	-$5.00	Deducted	11/02/2020 04:05:24	↺ Refund ▾
C-34	23	Purchased: Hummingbird printed t-shirt - Size : XL- Color : Black	$16.90	16	$27.04	Approved	11/02/2020 03:55:36	✖ Cancel ▾
C-27	23	Purchased: Hummingbird printed t-shirt - Size : S- Color : White	$16.90	15	$25.35	Pending	11/02/2020 03:55:35	✔ Approve ▾
C-28	23	Purchased: Hummingbird printed t-shirt - Size : S- Color : Black	$16.90	22	$55.78	Pending	11/02/2020 03:55:35	✔ Approve ▾
C-29	23	Purchased: Hummingbird printed t-shirt - Size : M- Color : White	$16.90	25	$63.38	Pending	11/02/2020 03:55:35	✔ Approve ▾
C-30	23	Purchased: Hummingbird printed t-shirt - Size : M- Color : Black	$16.90	30	$76.06	Pending	11/02/2020 03:55:35	✔ Approve ▾
C-31	23	Purchased: Hummingbird printed t-shirt - Size : L- Color : White	$16.90	35	$88.74	Pending	11/02/2020 03:55:35	✔ Approve ▾
C-32	23	Purchased: Hummingbird printed t-shirt - Size : L- Color : Black	$16.90	40	$101.41	Pending	11/02/2020 03:55:35	✔ Approve ▾
C-33	23	Purchased: Hummingbird printed t-shirt - Size : XL- Color : White	$16.90	20	$50.71	Pending	11/02/2020 03:55:35	✔ Approve ▾
U-7	--	Converted into voucher #6CCOKYCX	--	--	-$5.00	Deducted	10/27/2020 00:00:57	↺ Refund ▾
U-6	--	Withdrawn (PayPal, ID withdrawal: 5)	--	--	-$10.00	Deducted	10/26/2020 23:55:57	↺ Refund ▾
U-5	--	Withdrawn (PayPal, ID withdrawal: 4)	--	--	-$15.00	Deducted	10/26/2020 23:45:33	↺ Refund ▾
C-23	22	Purchased: The best is yet to come' Framed poster - Dimension : 40x60cm	$21.11	15	$31.67	Approved	10/26/2020 23:43:39	✖ Cancel ▾
C-24	22	Purchased: The best is yet to come' Framed poster - Dimension : 60x90cm	$35.67	20	$71.34	Pending	10/26/2020 23:43:39	✔ Approve ▾
C-25	22	Purchased: The best is yet to come' Framed poster - Dimension : 80x120cm	$57.51	30	$172.54	Pending	10/26/2020 23:43:39	✔ Approve ▾
C-26	22	Purchased: Mug The adventure begins	$8.66	16	$13.86	Pending	10/26/2020 23:43:39	✔ Approve ▾
C-20	21	Purchased: The best is yet to come' Framed poster - Dimension : 40x60cm	$21.11	1	$0.21	Pending	10/26/2020 23:31:20	✔ Approve ▾

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⊕ Back

V.   REWARD SETTINGS

Wholesale B2B module allows store admin to configure the rewards that wholesale customers will earn after purchasing wholesale products. Navigate to "**Settings**" > "**Reward settings**" page to edit these options as store admin prefer.

1. Reward usage settings

After earning reward by successfully purchasing products with large quantity, wholesale customers can use this reward to pay for order, convert into voucher codes or withdraw to their bank account. On this page, store admin can configure the reward usage for wholesale customers.

2. Withdrawal methods

Wholesale customers can send a withdrawal request to store admin and receive their reward money. Store admin should set up a payment method to enable wholesale customers to submit their withdrawal request.

Wholesale B2B has already created a default payment method for you. To add a new payment method, please click on "**Add new method**" button.
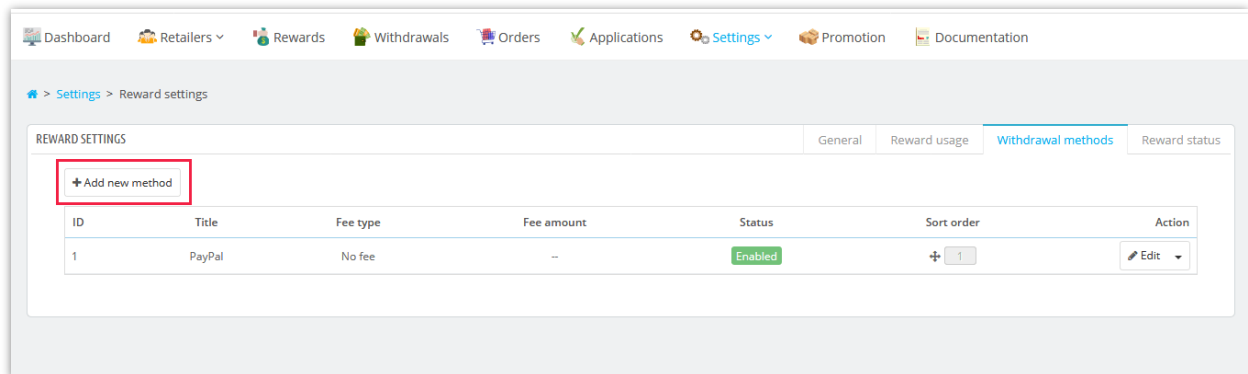
Next, please enter payment method name >> select payment fee type >> enter estimated processing time. Turn "Enable" option to "YES" then click "Save" button.

After saving new payment method, you can add several input fields (Bank account number, PayPal address, etc.) to collect necessary information from wholesale customers to process their withdrawal request.

Click on "**Add new field**" button to add payment input fields.

Enter method field title >> Select field type >> Add description (optional) >> Set this field as required or not >> Turn "Enable" option to "YES". Click "Save" to finish.

❖ *How wholesale customers can submit their withdrawal request*:

Wholesale customers will click on payment method name to select their prefer payment method.

Home / My account / My wholesale customer account / Withdrawals

Dashboard
Rewards
Withdrawals
Vouchers
Profile
Documentation

Select one of available payment methods below to submit your money withdrawal request

Logo	Method	Description	Estimate processing time	Fee	Available balance for withdrawal
	PayPal	The fastest method to withdraw funds, directly to your local bank account!	30 day(s)	Free	$280.39

YOUR LAST WITHDRAWAL REQUESTS

ID	Withdraw method	Amount	Status	Processed date	Description
7	PayPal	$10.00	Pending	2020-12-05 21:41:11	Withdrawn (PayPal, ID withdrawal: 7)
6	PayPal	$5.00	Approved	2020-12-02 04:05:24	Withdrawn (PayPal, ID withdrawal: 6)
5	PayPal	$10.00	Approved	2020-11-25 23:55:57	Withdrawn (PayPal, ID withdrawal: 5)
4	PayPal	$15.00	Pending	2020-11-25 23:45:33	Withdrawn (PayPal, ID withdrawal: 4)
2	PayPal	$1.00	Pending	2020-10-02 20:45:17	Withdrawn (PayPal, ID withdrawal: 2)
1	PayPal	$1.00	Approved	2020-09-26 04:59:59	Withdrawn (PayPal, ID withdrawal: 1)

Showing 1 to 6 of 6 (1 Page)

‹ Back to wholesale customer account   ♠ Home

Wholesale customers will need to fill in the withdrawal request form to be able to submit their request:

Store admin can view and manage all withdrawal requests on "**Withdrawals**" page:

3. Reward status

On this page, you can configure how reward status will be set in specific conditions.

Remember to save all your configuration. And now your wholesale program is ready to welcome the first customer!

To view all wholesale customer rewards, store admin can navigate to "**Rewards**" page. From this page, store admin can approve / cancel / delete a "Pending" reward or deduct, refund a reward.

Wholesale customers can also view their reward status from "**My wholesale customer account**" area from store frontend:

Home / My account / My wholesale customer account / Rewards

Dashboard	
Rewards	
Withdrawals	
Vouchers	
Profile	
Documentation	

REWARDS 40

ID	Reward	Note	Price	Quantity	Status	Date
	Min / Max		Min / Max	Min / Max	--	From / To	Filter
U-11	-$10.00	Converted into vourcher #KM3QVIIC	--	--	Deducted	11/05/2020 21:41:57
U-10	-$10.00	Withdrawn (PayPal, ID withdrawal: 7)	--	--	Deducted	11/05/2020 21:41:11
U-9	-$10.00	Converted into vourcher #WPS2IN4W	--	--	Deducted	11/02/2020 04:05:39
U-8	-$5.00	Withdrawn (PayPal, ID withdrawal: 6)	--	--	Deducted	11/02/2020 04:05:24
C-34	$27.04	Purchased: Hummingbird printed t-shirt - Size : XL- Color : Black	$16.90	16	Approved	11/02/2020 03:55:36
C-27	$25.35	Purchased: Hummingbird printed t-shirt - Size : S- Color : White	$16.90	15	Pending	11/02/2020 03:55:35
C-28	$55.78	Purchased: Hummingbird printed t-shirt - Size : S- Color : Black	$16.90	22	Pending	11/02/2020 03:55:35
C-29	$63.38	Purchased: Hummingbird printed t-shirt - Size : M- Color : White	$16.90	25	Pending	11/02/2020 03:55:35
C-30	$76.06	Purchased: Hummingbird printed t-shirt - Size : M- Color : Black	$16.90	30	Pending	11/02/2020 03:55:35
C-31	$88.74	Purchased: Hummingbird printed t-shirt - Size : L- Color : White	$16.90	35	Pending	11/02/2020 03:55:35

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‹ Back to wholesale customer account   🏠 Home

VI.   PRIVATE SHOP SETTINGS

Private shop only allows registered wholesale customers to access and purchase wholesale products. You can set private status for the entire store or set private status for selected categories / products only.

Here is a sample of private shop login screen:
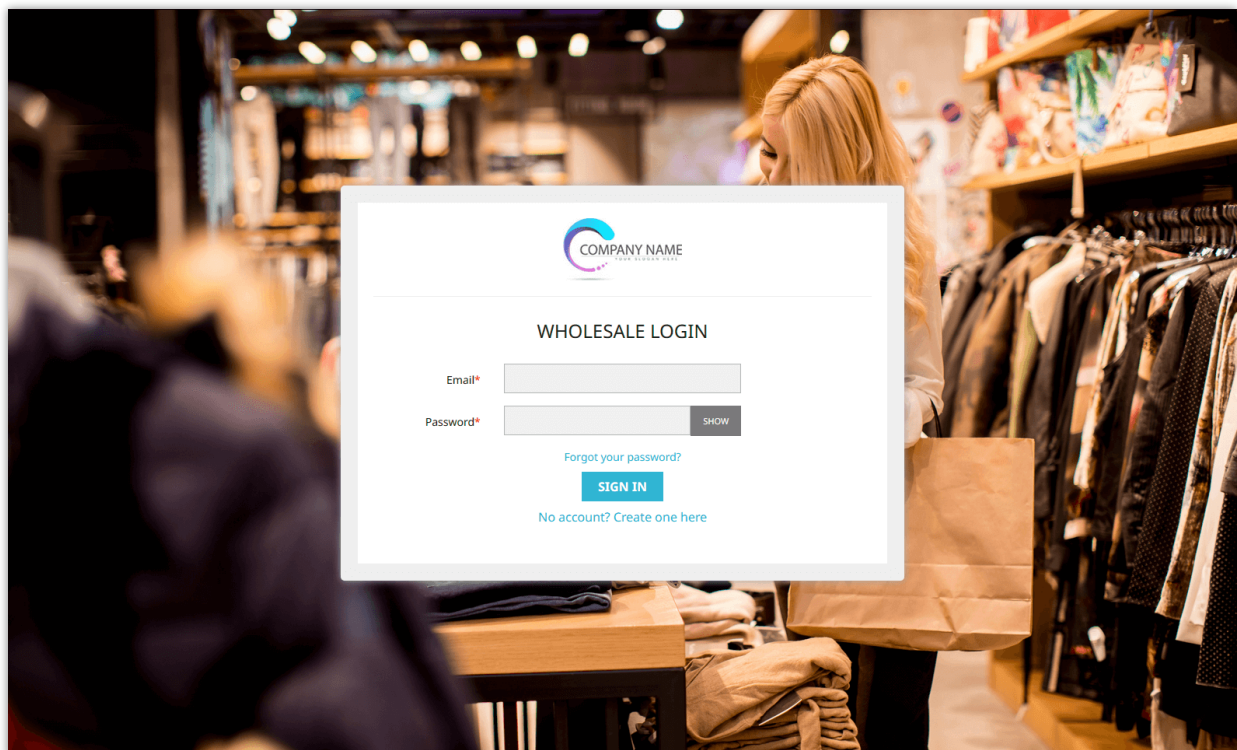
VII.   MANAGING WHOLESALE CUSTOMER'S APPLICATION

Any registered customers can become a wholesale customer on your PrestaShop store. Customers will need to apply an application to be able to join your wholesale program.

From "**My account**" page, customer will find "**My wholesale customer account**" area. They can manage everything related to their wholesale account by accessing this area.
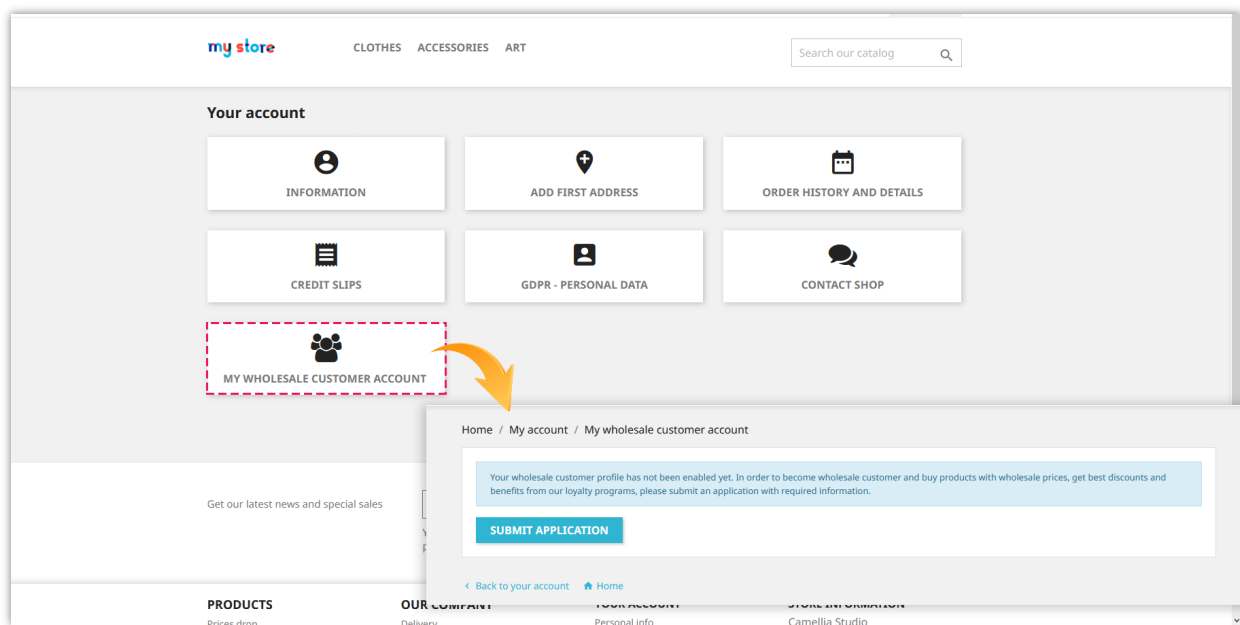
Customers need to enter all necessary information (which is required by store admin on "**Settings > Conditions**" page from module backend).

Store admin can view and manage all retailer applications from "**Applications**" page.
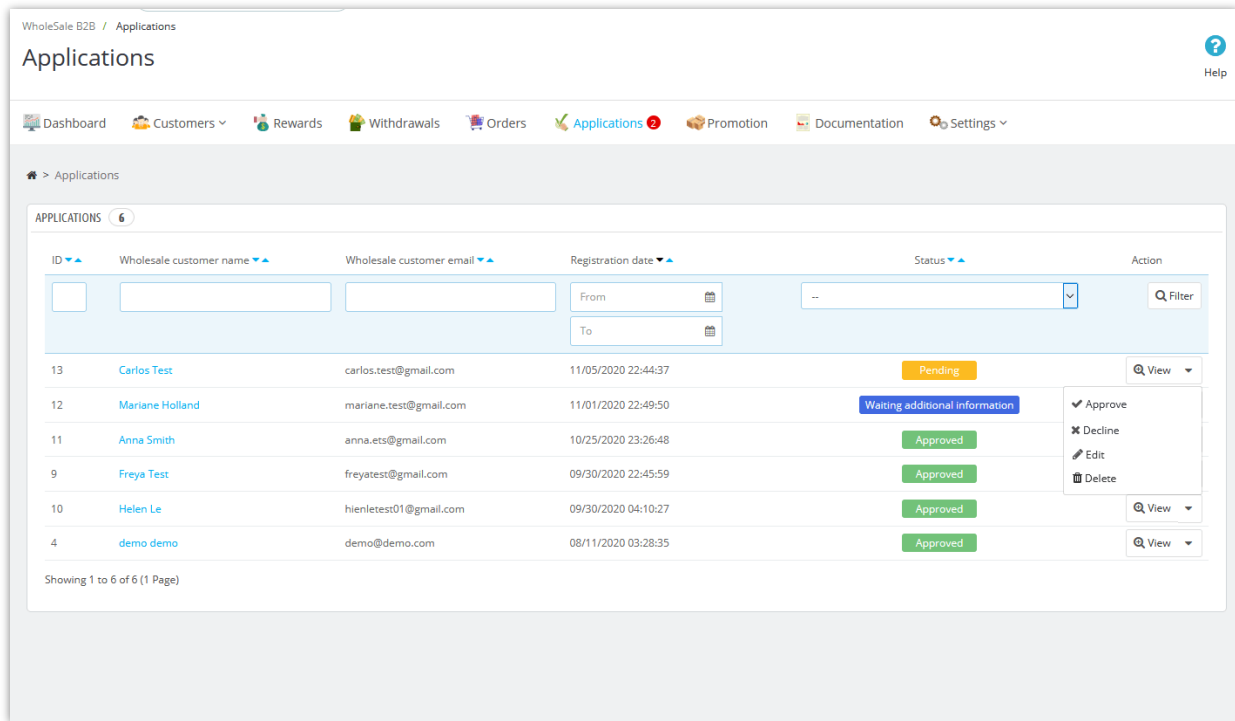
Store admin will check the information and approve/decline the register application.

<table>
<tr><td>VIII.</td><td>MANAGING PROMOTED PRODUCTS AND WHOLESALE ORDERS</td></tr>
</table>

1. Managing promoted products

Promoted products are the products displayed in "**My wholesale customer account**" area.

Store admin can view and manage the promoted products through "**Promotion**" page. Admin can search and select any existing products to become the promoted products.
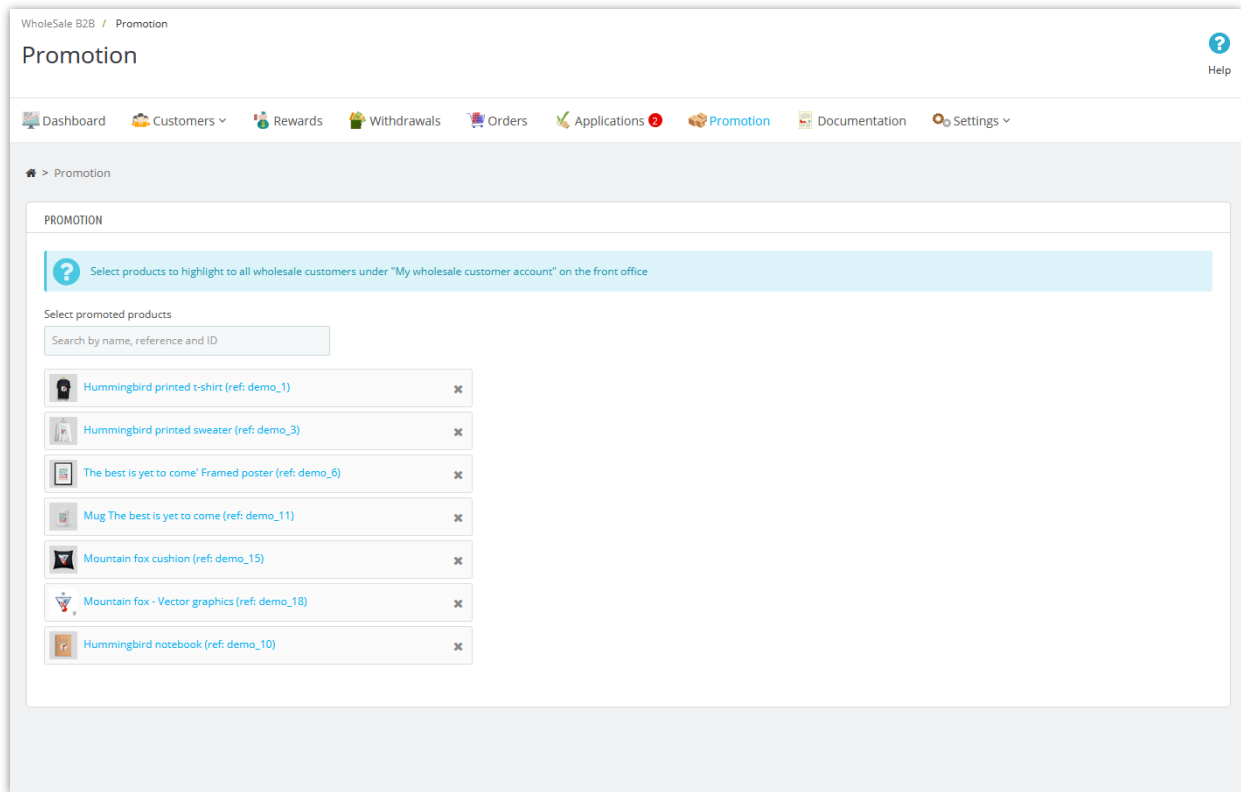
Store admin can also configure the wholesale settings for any specific product by navigate to "**Wholesale settings**" tab on the product editting page.

Wholesale customers can view all promoted products from "**My wholesale customer account**" area from store front end:

2. Managing wholesale orders

All orders containing products with wholesale price will appear on "**Orders**" page. Store admin can view both wholesale information and order information on order detail page.

ID	Order reference	Wholesale customer name	Total quantity	Total payment	Discounts	Rewards	Status	Date	Action
23	AXVIJWVGR	demo demo	203	$3,438.39	$605.49	$488.47	Awaiting bank wire payment	11/02/2020 03:55:35	View
22	FDHVUWKPJ	demo demo	81	$2,901.37	$1,240.32	$289.41	Awaiting bank wire payment	10/26/2020 23:43:39	View
21	UYJMUTKON	demo demo	3	$121.57	$48.98	$1.15	Awaiting check payment	10/26/2020 23:31:20	View
20	APCVCSFVS	demo demo	176	$2,807.07	$699.95	$268.84	Payment accepted	10/26/2020 23:28:14	View
19	BOQLIXYJW	Helen Le	60	$1,799.42	--	$137.40	Payment accepted	09/30/2020 04:38:43	View
18	KSQQSTTXP	demo demo	35	$754.62	--	$15.43	Payment accepted	08/27/2020 05:01:10	View
17	TWHGDIDPS	demo demo	15	$244.55	$26.36	$5.91	Payment accepted	08/11/2020 03:35:00	View
16	OZSSGULQL	--	47	$929.08	--	--	Awaiting check payment	06/20/2020 04:27:30	View
15	MVNNKCDJD	demo demo	49	$1,251.32	$219.54	--	Awaiting check payment	06/09/2020 21:24:02	View
14	HJGIJEPDO	--	199	$3,587.57	--	--	Awaiting check payment	06/09/2020 21:20:26	View
13	HZZKVUEPA	--	1	$37.44	--	--	Payment accepted	06/09/2020 04:23:20	View
12	MRDQIXEVH	--	31	$951.50	--	--	Payment accepted	06/09/2020 04:16:36	View
11	DNZWTPMNN	--	99	$1,975.88	--	--	Shipped	06/09/2020 04:15:36	View
10	OMXPBMBEH	demo demo	19	$580.32	--	--	Canceled	06/09/2020 04:12:03	View
9	ROJWCBJJW	demo demo	126	$1,922.23	--	--	Remote payment accepted	06/09/2020 04:11:01	View
8	HKMGBGGBK	demo demo	299	$7,939.65	--	--	Awaiting check payment	06/09/2020 04:07:24	View
7	KDNPLAGBM	demo demo	698	$11,543.16	--	--	Payment accepted	06/09/2020 03:36:59	View
6	XLSDMMXGH	demo demo	159	$2,149.99	--	--	Payment accepted	06/09/2020 03:21:54	View
5	KHWLILZLL	--	1	$20.90	--	--	Payment accepted	04/10/2020 00:51:30	View
4	FFATNOMMJ	--	1	$14.90	--	--	Awaiting check payment	04/10/2020 00:51:30	View

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Orders

Order APCVCSFVS from demo demo

Recommended Modules   Help

WHOLESALE CUSTOMER INFO

Wholesale customer name	demo demo		Order total ❓	$3,806.24
Wholesale customer email	demo@demo.com		Total reward balance ❓	$279.39
Registration date	2020-08-11 03:28:47		Total reward ❓	$348.89
Wholesale level	Level 3		Withdrawn ❓	$42.00
Discount	20.00%		Paid for orders ❓	$0.00

Reward range	Reward range	Starting at (units)	Reward value
	Level 1	1	1%
	Level 1	6	3%
	Level 3	11	10%
	Default	20	15%
	Default	30	20%

Converted to voucher ❓	$27.50
Total used ❓	$69.50

Status	Enabled

Total reward which wholesale customer earned from this order: $268.84

Image	Product	Product price	Quantity	Total price	Reward
	Hummingbird printed t-shirt - Size : S- Color : White	$15.91	10	$159.08	$4.77
	Hummingbird printed t-shirt - Size : S- Color : Black	$15.91	18	$286.34	$28.63
	Hummingbird printed t-shirt - Size : M- Color : White	$15.91	25	$397.70	$39.77
	Hummingbird printed t-shirt - Size : M- Color : Black	$15.91	13	$206.80	$20.68
	Hummingbird printed t-shirt - Size : L- Color : White	$15.91	20	$318.16	$31.82
	Hummingbird printed t-shirt - Size : L- Color : Black	$15.91	30	$477.24	$47.72
	Hummingbird printed t-shirt - Size : XL- Color : White	$15.91	25	$397.70	$39.77
	Hummingbird printed t-shirt - Size : XL- Color : Black	$15.91	35	$556.77	$55.68

ORDER APCVCSFVS #20

🖨 Print order   📄 View invoice   ✖ No delivery slip   ⇄ Partial refund

⏱ STATUS 2   📄 DOCUMENTS 1

| ✔	Payment accepted	Super Admin	10/26/2020 23:29:01	↩ Resend email
🔔	Awaiting bank wire payment		10/26/2020 23:28:15	↩ Resend email

Payment accepted   UPDATE STATUS

🚚 SHIPPING 1   🔄 MERCHANDISE RETURNS 0

Date	Carrier	Weight	Shipping cost	Tracking number	
10/26/2020 23:28:15	My carrier	0.000 kg	$7.00		✏ Edit

✖ Recycled packaging   ✖ Gift wrapping

👤 CUSTOMER DEMO DEMO #4

View full details...

👁 PRIVATE NOTE

💾 Save

Email
✉ demo@demo.com

Account registered
📅 06/05/2020 04:42:31

Valid orders placed
6

Total spent since registration
$19,421.62

🚚 SHIPPING ADDRESS   📄 INVOICE ADDRESS

My Address - Bac Giang 65432 Bac Giang Alabama , United S...   🔄 Change

demo demo
Bac Giang
Bac Giang, Alabama 65432
United States

✏ Edit

IX.   MANAGING RETAILER DOCUMENTATIONS

Store admin can upload and manage documentations for different wholesale levels. These documentations can be: pdf, docx, doc, docs, xls, xlsx, xlsm, zip or rar file with size limitation of 8MB.

To upload a new documentation, please navigate to "**Documentations**" page > Click on "**Add new**" icon:
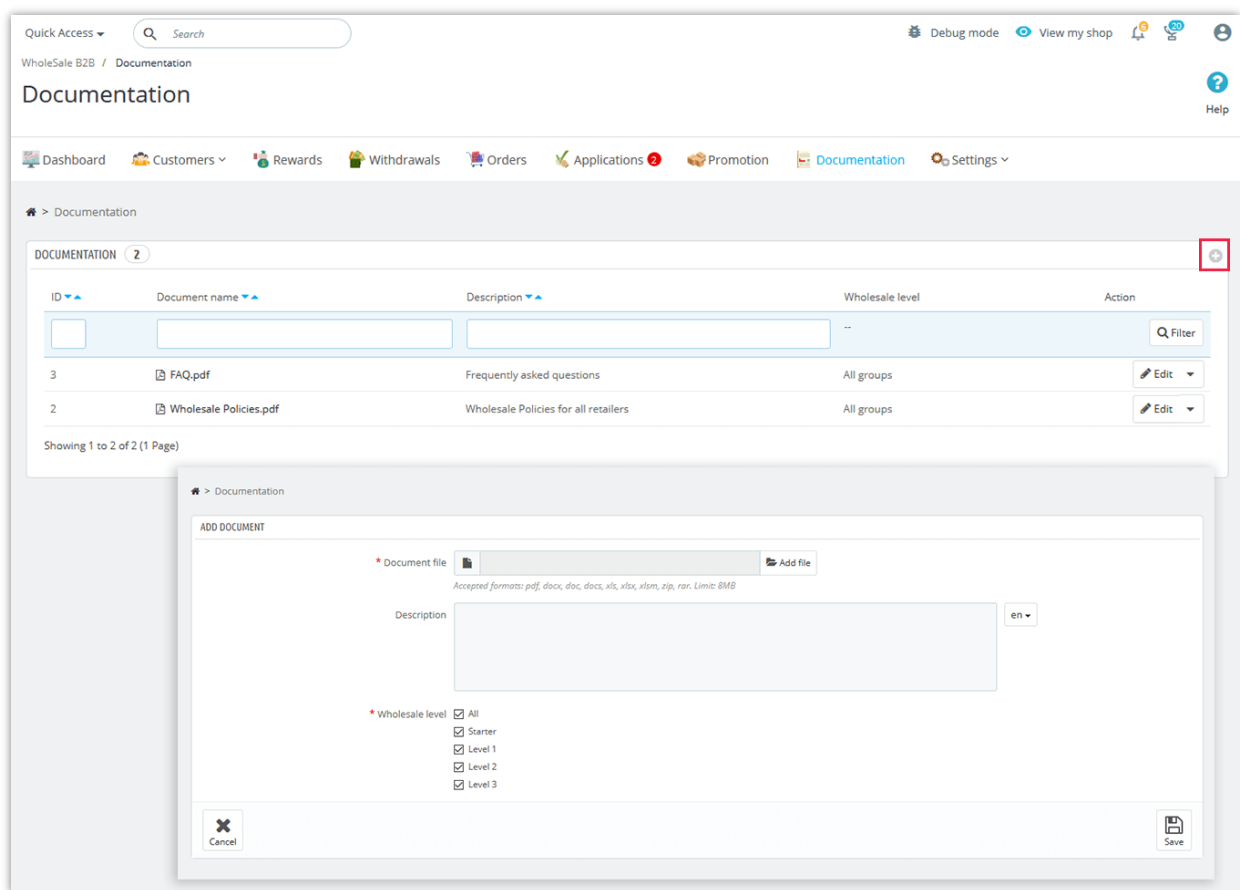
Select the file you want to upload. Enter the description for the file and select the wholesale levels who will be able to access your file. Click "Save" to finish.

Wholesale customers can view and download the documentations uploaded by store administration from "**My wholesale customer account**" area:
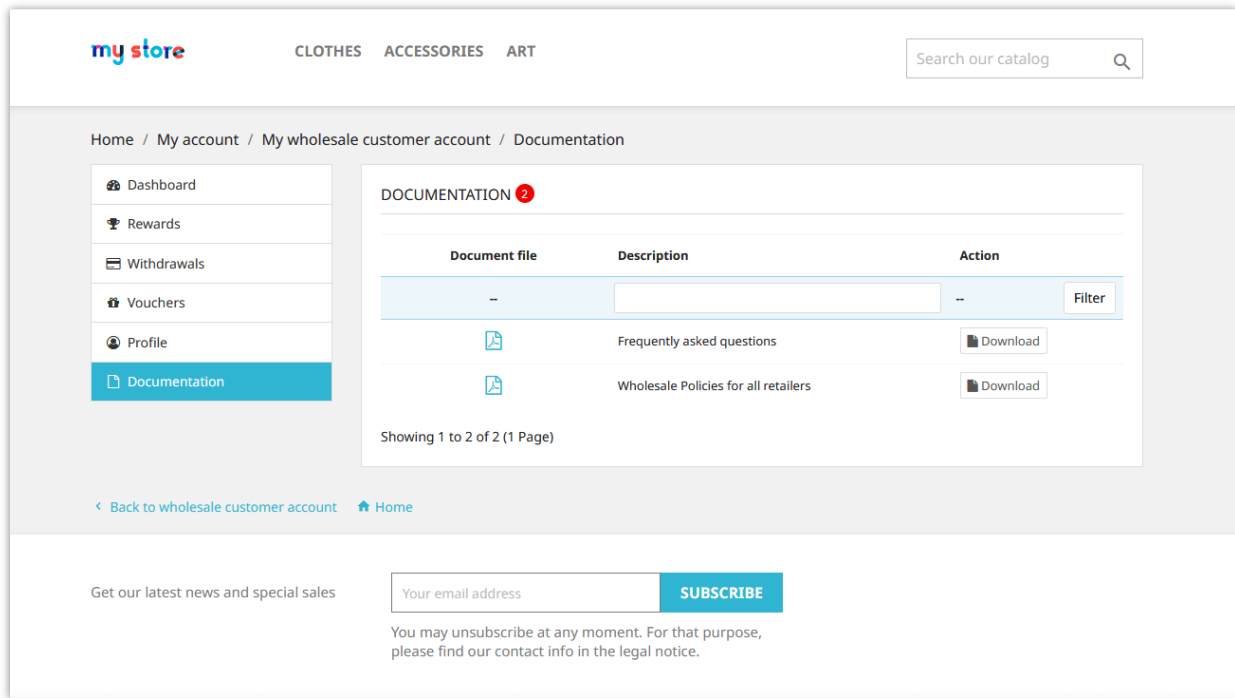
X.	DASHBOARD

Wholesale B2B module comes with a dashboard with detailed statistic charts and helpful information. Store admin can have an overall look about wholesale activities through this dashboard.
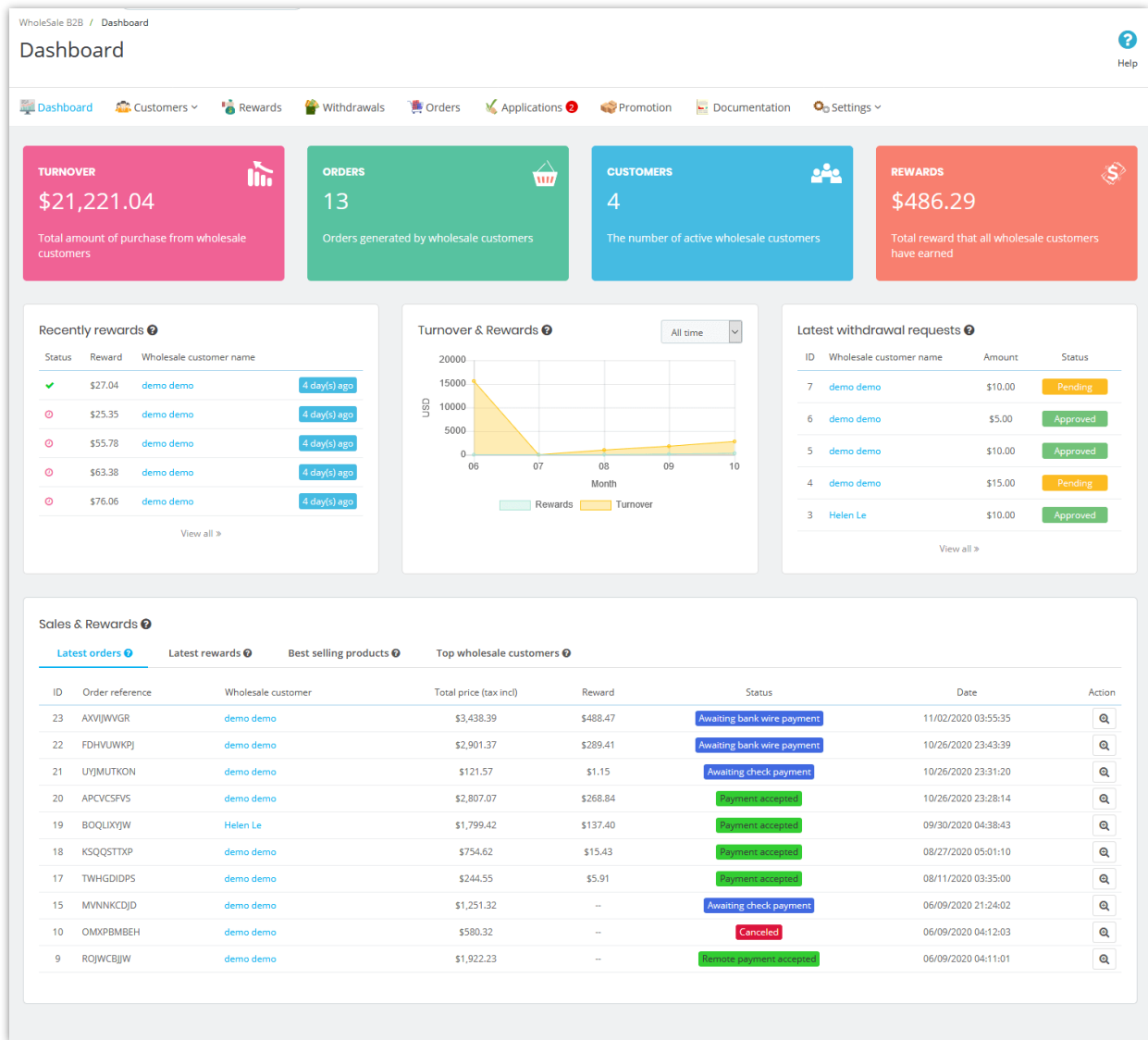
Wholesale customers are also provided a dashboard on "**My wholesale customer account**" area to keep track of their reward status, detailed statistic data of reward usage, earning reward, etc.
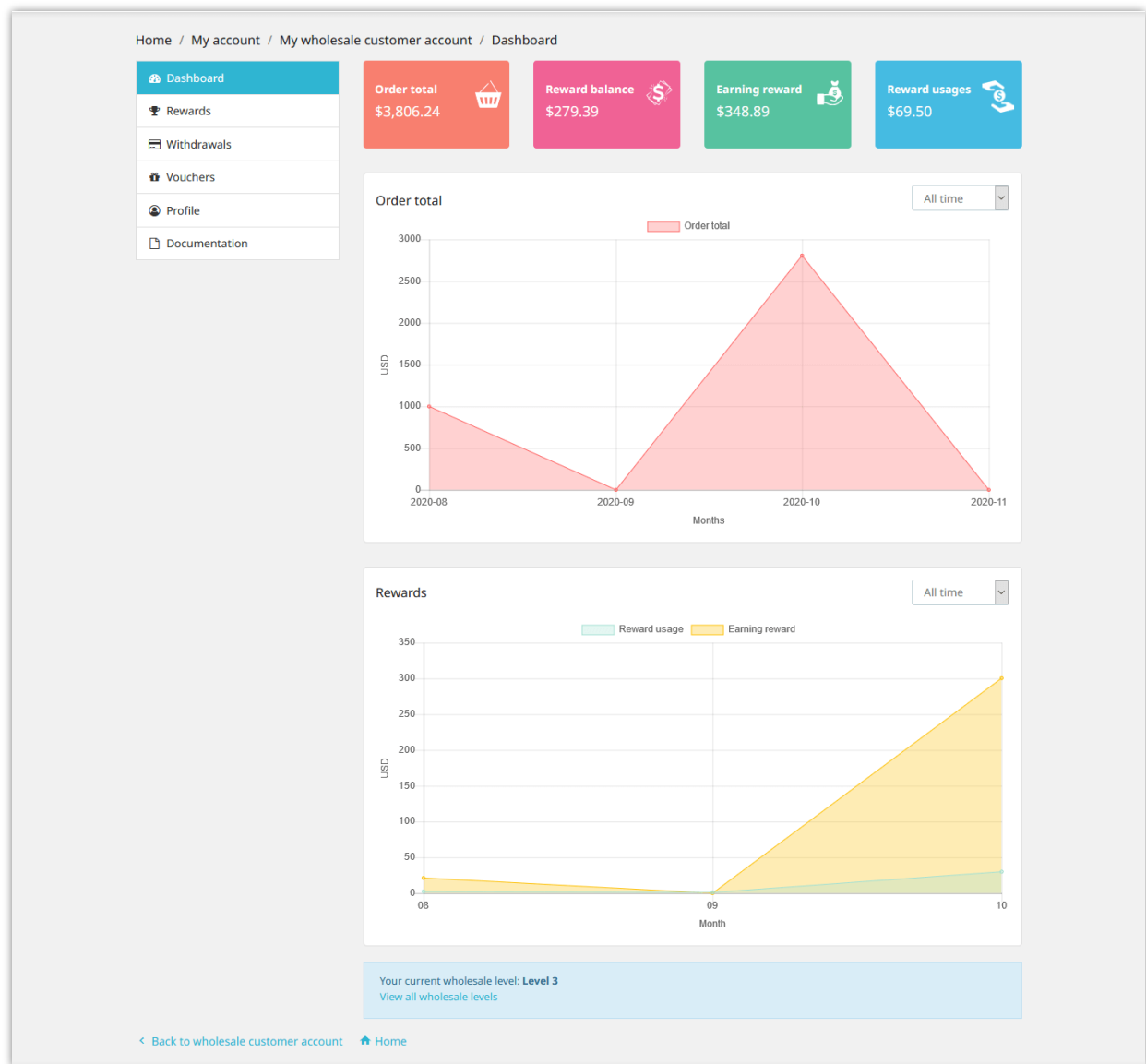
XI.   THANK YOU

Thank you again for purchasing our product and going through this documentation. We hope this document is helpful and efficient in the installation and usage of **Wholesale B2B** module. If you do have any questions for which the answer is not available in this document, please feel free to contact us.