



# bundle b2b

User Documentation

A robust, flexible, and convenient platform for all your B2B needs.

**SILK**  
Better Commerce



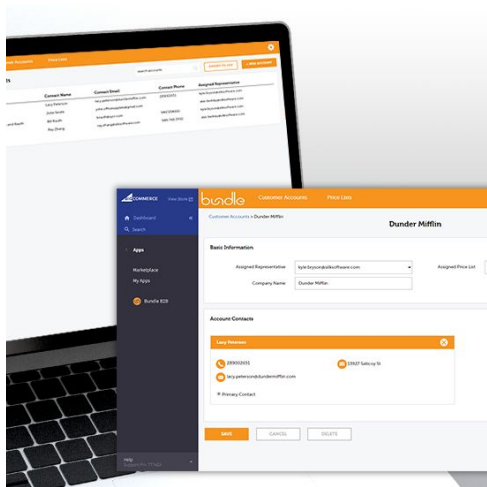
*streamline, integrate, connect*

## K \Uh6i bX`Y`XcYgs

*### # ° °*

Bundle B2B by SILK Software streamlines and integrates buyer and seller interactions, and combines them into a single, user-friendly platform. Features such as user account management and associate price lists allow easy management of business to business dealings. Additional front-end functionality allows customers to generate order requests and submit them to an Admin for approval. By creating a convenient and effective link between businesses and their clients, Bundle B2B simplifies and improves the Buyer-Seller relationship.

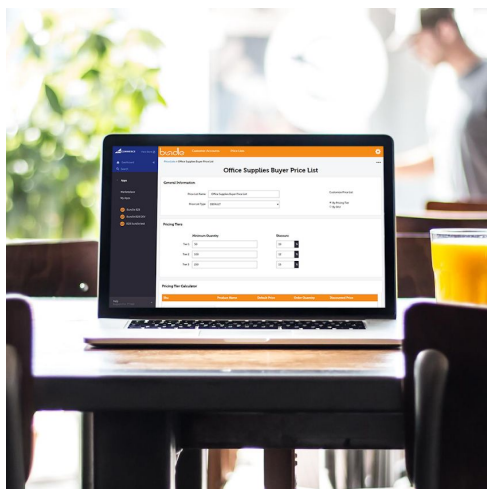
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## Customer Account Management

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Easily access and organize all your user account information in one place. From here, you can view contact information, company information, assign representatives, add account contacts, and more.



## Price Lists

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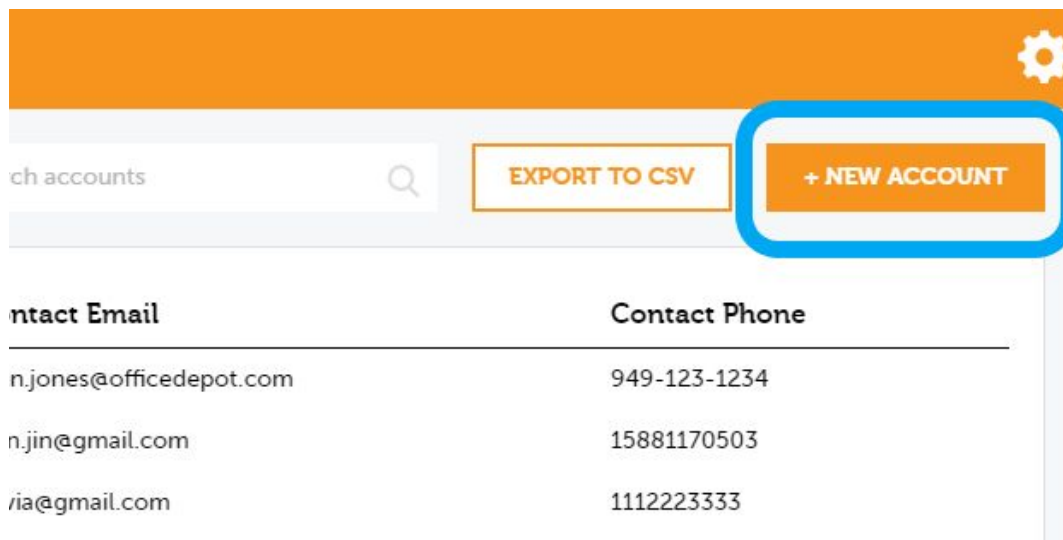
From this page, you can edit and create price lists for customer discounts.

## Customer Accounts

Bundle B2B allows you to keep track of all customer accounts, including information such as the assigned representative and company contacts.

### Creating a Customer Account

1. To create a customer account, use the +New Account button found at the top right of the webpage.



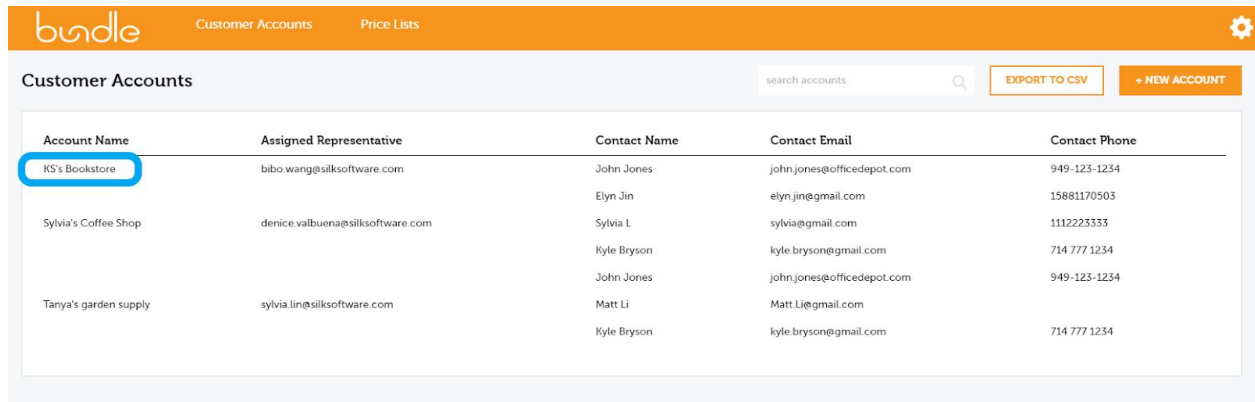
2. From this screen, you can access and edit basic information about the customer account, as well as add new account contacts.

#### a. Basic Information

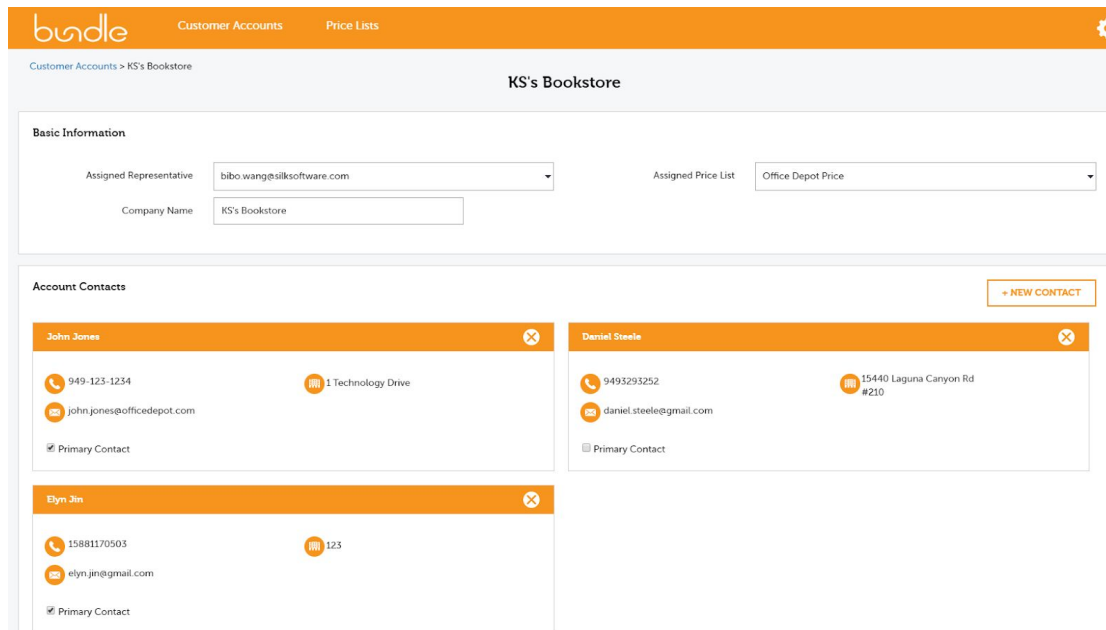
- i. **5ggj[ bYX 'FYdfYgybUhj Y.** Here, you can assign a representative from your company to manage business dealings with your customer. Simply select the email address of the chosen employee from the drop-down menu.
- ii. **5ggj[ bYX 'DfJW '@gh** From this drop-down, you can select one of your price lists to assign to your customer. Each price list can have different discount levels and amounts.
- iii. **7ca dUbmB Ua Y.** Basic identifying information.

## Editing a Customer Account

- To edit a customer account, left click on the customer account name. From this page, you can see basic information (assigned representative, assigned price list, and company name) about the company and company contacts.



Account Name	Assigned Representative	Contact Name	Contact Email	Contact Phone
KS's Bookstore	bibo.wang@silkssoftware.com	John Jones	john.jones@officedepot.com	949-123-1234
Sylvia's Coffee Shop	denice.valbuena@silkssoftware.com	Elyn Jin	elyn.jin@gmail.com	15881170503
		Sylvia L	sylvia@gmail.com	1112223333
		Kyle Bryson	kyle.bryson@gmail.com	714 777 1234
		John Jones	john.jones@officedepot.com	949-123-1234
Tanya's garden supply	sylvia.lin@silkssoftware.com	Matt Li	Matt.Li@gmail.com	
		Kyle Bryson	kyle.bryson@gmail.com	714 777 1234



Customer Accounts > KS's Bookstore

### KS's Bookstore

**Basic Information**

Assigned Representative:

Assigned Price List:

Company Name:

**Account Contacts** + NEW CONTACT

**John Jones**

949-123-1234 | 1 Technology Drive

john.jones@officedepot.com

Primary Contact

**Daniel Steele**

9493293252 | 15440 Laguna Canyon Rd #210

daniel.steele@gmail.com

Primary Contact

**Elyn Jin**

15881170503 | 123

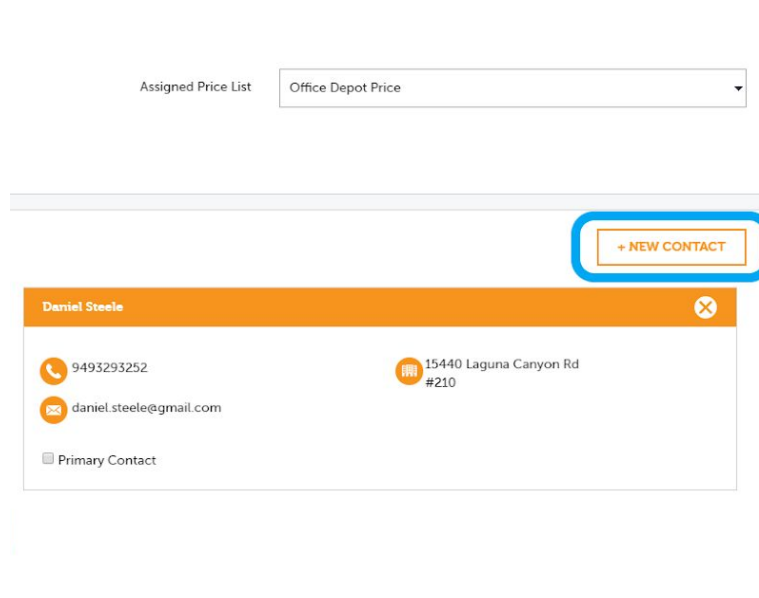
elyn.jin@gmail.com

Primary Contact

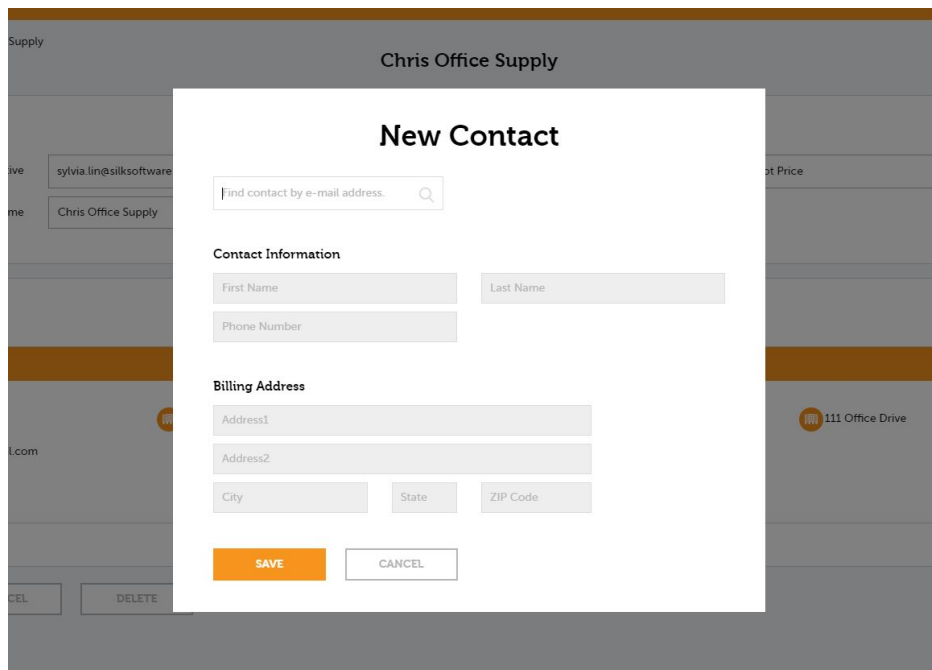
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## Creating a New Contact

1. In the Account Contacts section, use the +New Contact button.

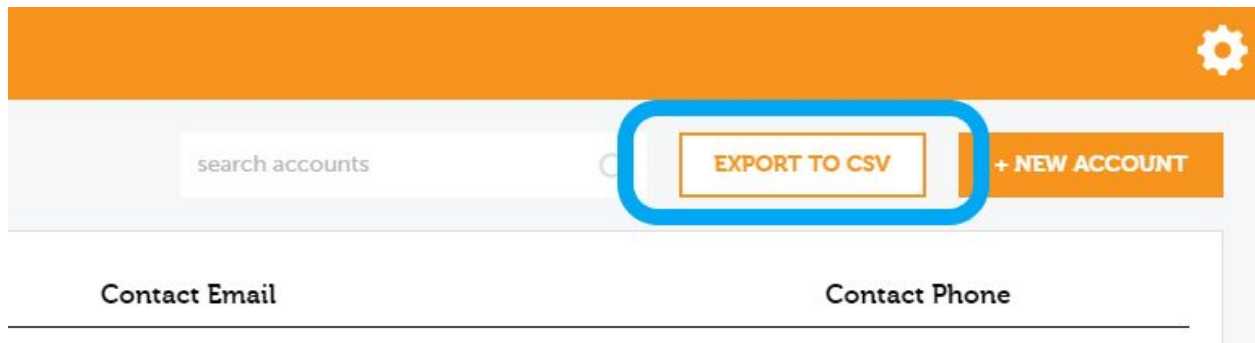


2. From here, you can assign a contact using the email addresses assigned by BigCommerce's store features, then fill out their personal information.



## Exporting Company List

1. To export a list of companies and customer accounts, use the Export to CSV button. This will download a CSV file that can be opened in any spreadsheet program, i.e. Excel or Google Sheets.



## Price Lists

From the price lists tab, you can manage account specific or wholesale discounts, and assign discount rates to either specific items or to item quantity.

 A screenshot of the 'bundle' web application interface showing the 'Price Lists' tab. The header bar is orange and contains the 'bundle' logo, 'Customer Accounts', and 'Price Lists' tabs, along with a gear icon. Below the header is a search bar with the placeholder text 'search accounts'. To the right of the search bar are two buttons: 'EXPORT TO CSV' and '+ NEW PRICE LIST'. Below these elements is a table with the following data:
 

List Name	List Type	Creation Date	Last Updated
Den's Coffee Shop price list	Account Specific	2018-07-11 17:03:09	2018-07-11 21:28:49
Office Depot Price	WholeSale	2018-06-28 15:54:03	2018-07-16 10:27:17
Sylvia's Coffee Shop price list	Account Specific	2018-07-11 16:01:18	2018-07-13 11:01:15

## Creating a Price List

1. To create a new price list, use the +New Price List button found at the top right of the webpage.

The screenshot shows the 'bundle' interface with 'Customer Accounts' and 'Price Lists' tabs. A search bar for accounts is present, along with 'EXPORT TO CSV' and '+ NEW PRICE LIST' buttons. The '+ NEW PRICE LIST' button is circled in blue.

List Name	List Type	Creation Date	Last Updated
Den's Coffee Shop price list	Account Specific	2018-07-11 17:03:09	2018-07-11 21:28:49
Office Depot Price	Wholesale	2018-06-28 15:54:03	2018-07-16 10:27:17
Sylvia's Coffee Shop price list	Account Specific	2018-07-11 16:01:18	2018-07-13 11:01:15

- From here, you can set the information for the price list, including the name of the list, whether it is wholesale or account specific, and choose to discount based either on quantity or by product name and SKU.

The 'New Price List' form is divided into two main sections: 'General Information' and 'Pricing Tiers'.

**General Information:**

- Price List Name:
- Price List Type:
- Customize Price List:
- By Pricing Tier:
- By SKU:

**Pricing Tiers:**

Tier	Minimum Quantity	Discount
Tier 1	<input type="text"/>	<input type="text"/> %
Tier 2	<input type="text"/>	<input type="text"/> %
Tier 3	<input type="text"/>	<input type="text"/> %

## Creating a Price List with CSV

- If you wish to create and edit your price list outside of Bundle, you can use the Download Template function to get an editable CSV file.
- First, navigate to the Price Lists tab.
- Click the +New Price List button.

This screenshot is identical to the first one, showing the 'bundle' interface with 'Customer Accounts' and 'Price Lists' tabs. The '+ NEW PRICE LIST' button is circled in blue.

List Name	List Type	Creation Date	Last Updated
Den's Coffee Shop price list	Account Specific	2018-07-11 17:03:09	2018-07-11 21:28:49
Office Depot Price	Wholesale	2018-06-28 15:54:03	2018-07-16 10:27:17
Sylvia's Coffee Shop price list	Account Specific	2018-07-11 16:01:18	2018-07-13 11:01:15



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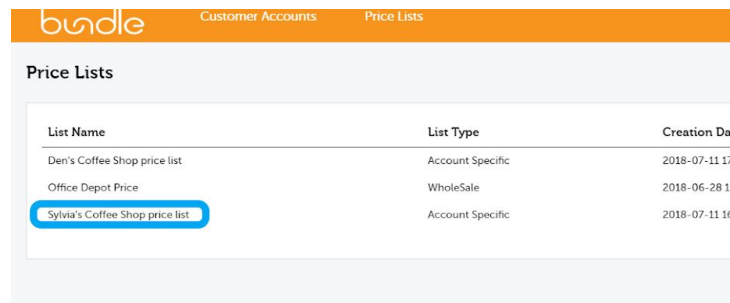
4. Customize your price list to sort by SKU.

5. Click the *Download Template* button.

6. Open the downloaded template from your Downloads folder.

## Editing a Price List

1. To edit a price list, click on the name of the existing list you wish to change.



List Name	List Type	Creation Date
Den's Coffee Shop price list	Account Specific	2018-07-11 17
Office Depot Price	WholeSale	2018-06-28 11
Sylvia's Coffee Shop price list	Account Specific	2018-07-11 16

2. From here, you can change the name of the price list, choose between wholesale and account specific price lists, and choose between discounting based on the number of items purchased, or individually by product name or SKU.

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bundle Customer Accounts Price Lists

Price Lists > Sylvia's Pet Store

### Sylvia's Pet Store

**General Information**

Price List Name:




Price List Type:

Customize Price List:

By Pricing Tier

By SKU

search by product name or SKU  [UPLOAD CSV](#) [Download Template](#)

	SKU	Product Name	Default Price	Override Price	
	<input type="text" value="ABS"/>	[Sample] Able Brewing System	\$225.0000	<input type="text" value="\$ 187.0"/>	<input type="text" value=""/>
	<input type="text" value="DPB"/>	[Sample] Dustpan & Brush	\$34.9500	<input type="text" value="\$ 27.0"/>	<input type="text" value=""/>
	<input type="text" value="TWB"/>	[Sample] Tiered Wire Basket	\$119.9500	<input type="text" value="\$ 100.0"/>	<input type="text" value=""/>

## Adding Products by SKU or Product Name

1. To add a product to discount, you can use SKU or product name. Make sure that "By SKU" is selected in the General Information section.
2. Then, use the search function to find the item in question.
3. Use the ENTER key to add the item. You can then change the price of the item according to the discount you wish to give.

bundle Customer Accounts Price Lists

Price Lists > Sylvia's Coffee Shop price list

### Sylvia's Coffee Shop price list

**General Information**

Price List Name:

Price List Type:

Customize Price List:

By Pricing Tier

By SKU

search by product name or SKU  [UPLOAD CSV](#) [Download Template](#)

	SKU	Product Name	Default Price	Override Price	
	<input type="text" value=""/>			<input type="text" value="\$"/>	<input type="text" value=""/>

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## Adding Products by Pricing Tier

1. You can also add discounts by pricing tier. First, type in the number of items the customer needs to order to receive a specific discount.
2. Then, assign the percentage discount according to the tier.

The screenshot shows a 'Pricing Tiers' configuration form. It is divided into two columns: 'Minimum Quantity' and 'Discount'. Under 'Minimum Quantity', there are three input fields labeled 'Tier 1', 'Tier 2', and 'Tier 3' with values 3, 5, and 10 respectively. Under 'Discount', there are three input fields with values 5, 10, and 20, each followed by a percentage sign icon.

Tier	Minimum Quantity	Discount
Tier 1	3	5 %
Tier 2	5	10 %
Tier 3	10	20 %

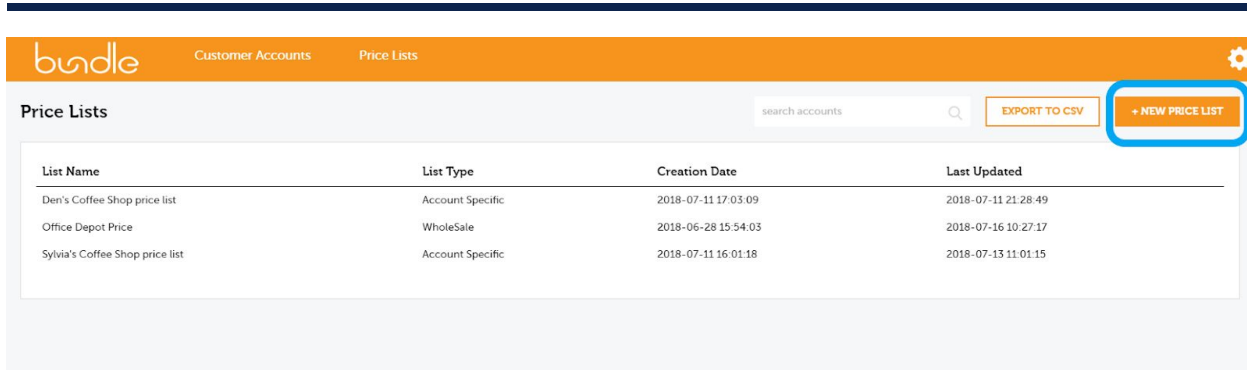
## Exporting Price Lists

1. To export all your price lists, use the Export to CSV button. This will download a CSV file that can be accessed from your downloads folder.



## Importing a Price List

1. If you wish to import a Price List created outside of Bundle, you can use the Upload CSV function to upload an edited CSV file.
  2. First, navigate to the Price Lists tab.
  3. Click the +New Price List button.
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The screenshot shows the 'bundle' application interface. The top navigation bar is orange and contains the 'bundle' logo, 'Customer Accounts', 'Price Lists', and a settings gear icon. Below the navigation bar, the 'Price Lists' section is displayed. It features a search bar labeled 'search accounts', an 'EXPORT TO CSV' button, and a '+ NEW PRICE LIST' button highlighted with a blue circle. Below these elements is a table with the following data:

List Name	List Type	Creation Date	Last Updated
Den's Coffee Shop price list	Account Specific	2018-07-11 17:03:09	2018-07-11 21:28:49
Office Depot Price	WholeSale	2018-06-28 15:54:03	2018-07-16 10:27:17
Sylvia's Coffee Shop price list	Account Specific	2018-07-11 16:01:18	2018-07-13 11:01:15

4. Customize your price list to sort by SKU.

5. Click the Upload CSV button.

6. Select the file you wish to upload from your computer.