

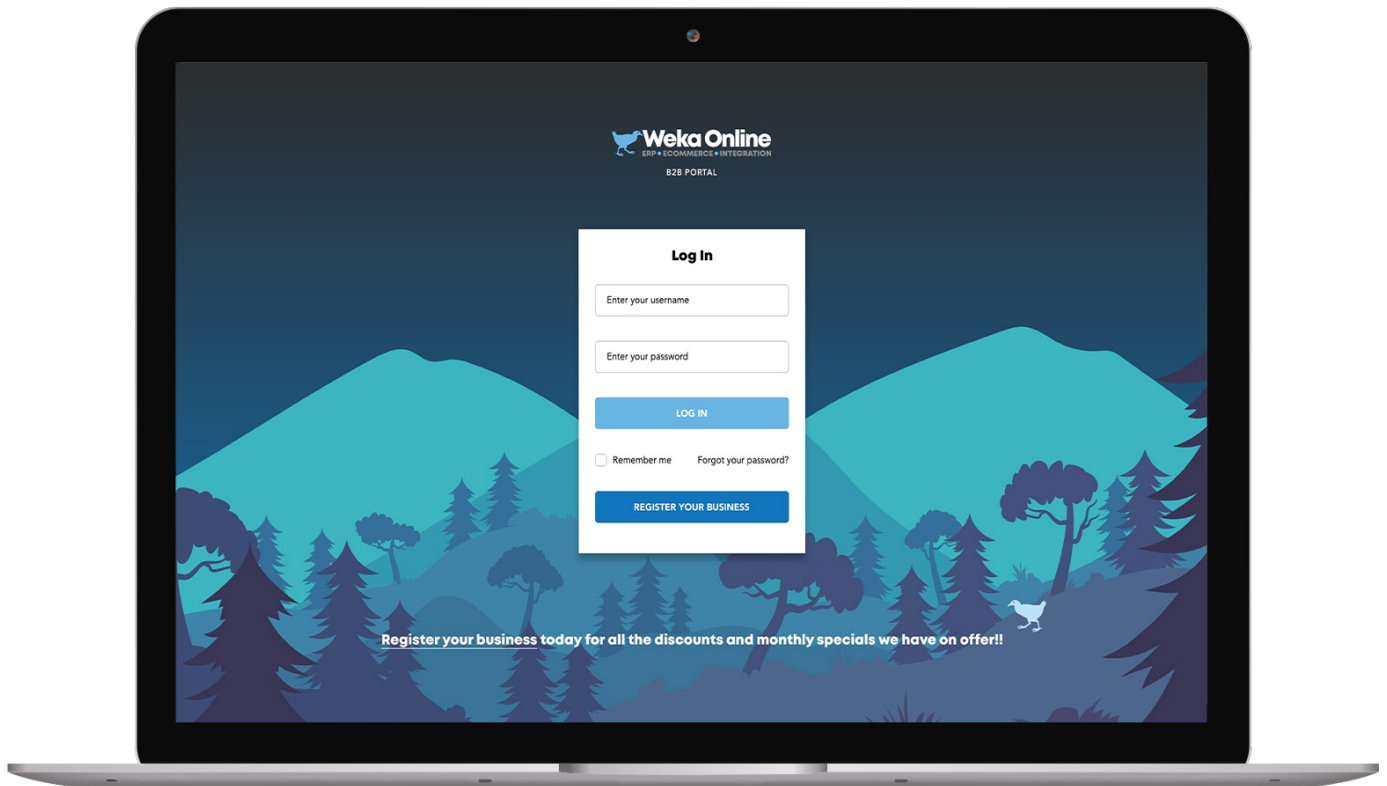
# Weka B2B

MYOB Advanced

 **Weka Online**  
ERP • ECOMMERCE • INTEGRATION

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# Weka B2B.

**The Weka B2B Portal is ideal for companies needing a system for customers to place online orders and to manage their customer accounts.**

# Overview.

**The Weka B2B Portal is a result of 10 years worth of servicing clients with their ERP to eCommerce needs. We have taken real-world customer experience and invested in creating a solution designed to reduce your support and administrative costs and improve your bottom line.**

We have built our technology on proven eCommerce systems, WordPress and WooCommerce. Our eCommerce customisations are designed with MYOB Advanced in mind.

The B2B Portal resides on a subdomain of your main website. The customer must have a trade account to view the B2B Portal, and in most cases, they must fill in an application form to gain approval before being allowed access.

Customers can order in the B2B Portal with the billing and shipping details previously entered into their Trade Account. The end price is a combination of sales pricing and sales discounts derived from MYOB Advanced.

Trade Account holders can view invoice statements online, pay their balance, and manage their contacts and addresses.

Your company can customise the B2B Portal design in the backend with easy-to-use design controls. B2B Portal Administrators can create custom user roles in the backend, adjusting each role's ability to view or manage part of the B2B Portal.

A B2B Portal administrator can upload brand collateral such as customer catalogues and price sheets into the Portal in the form of a PDF.

# Products.

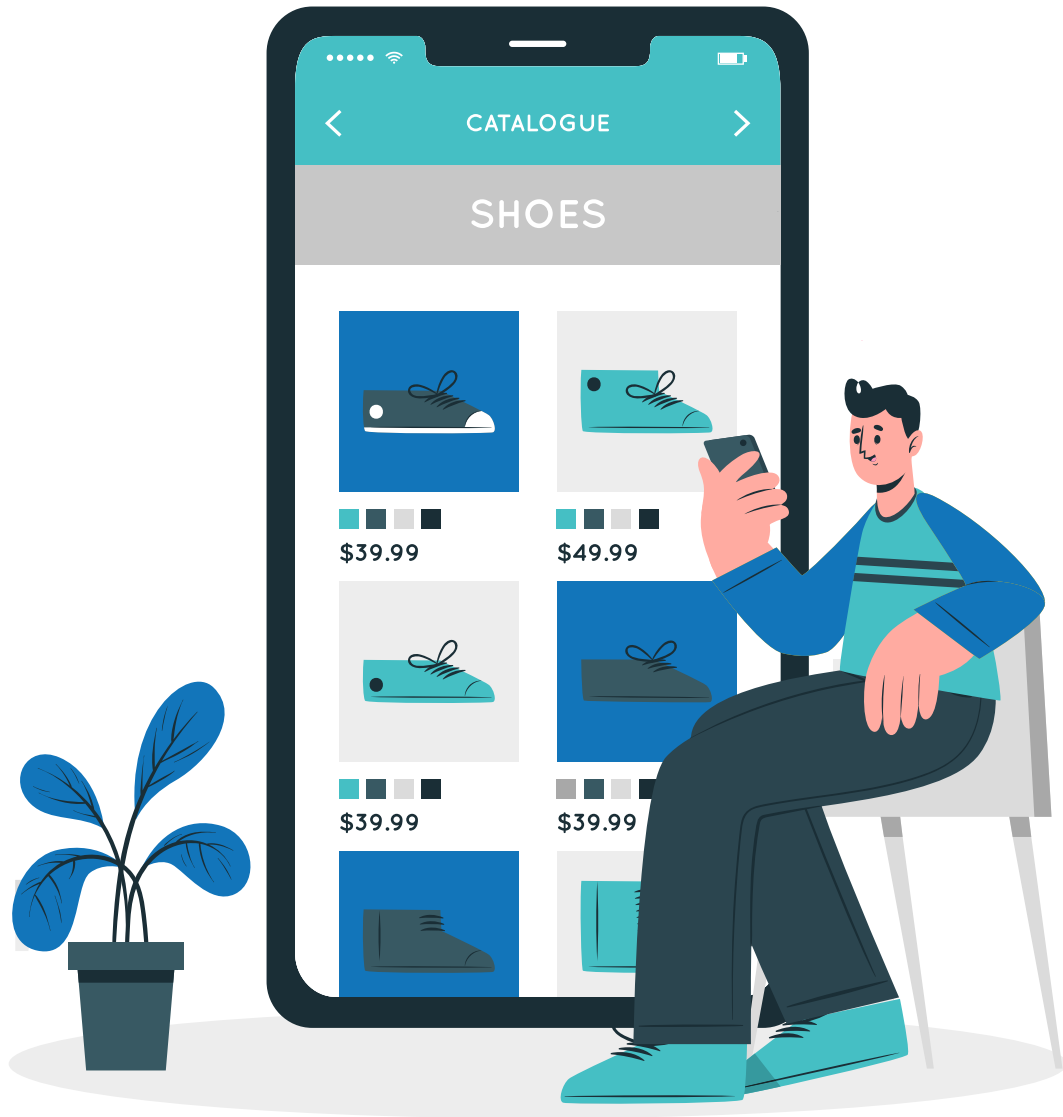
## Stock Items to Simple Products

Now you can manage your website products from one source of truth, MYOB Advanced. We have built our integration to work with MYOB Advanced Stock Item fields.

Once you have finished editing and saved a stock item in MYOB Advanced, a push notification will send the product data from MYOB Advanced to Weka B2B.

## Integrated Fields:

MYOB Advanced	Weka B2B
Description	Title
MSRP	Price
Default Price	Price/On Sale Price
Description Tab	Full Description
Item Sales Categories	Product Categories
Attributes	Attributes
Related Items: Cross Sell & Upsell Data	Cross Sell & Upsell Data
First Image	Featured Image
Additional Images	Gallery Images



## Non-Stock Items to Simple Products ✓

The Weka connector sends Non-Stock items to Weka B2B as simple products. However, there is a difference in stock management of Stock and Non-Stock items. The B2B Portal does not track the stock available for a non-stock item, meaning there are no limits to the number the customer can order.

Once you have finished editing and saved a non-stock item in MYOB Advanced, a push notification will send the product data from MYOB Advanced to Weka B2B.

## Integrated Fields:

MYOB Advanced	Weka B2B
Description	Title
MSRP	Price
Default Price	Price/On Sale Price
Description Tab	Full Description
Item Sales Categories	Product Categories
Attributes	Attributes
Related Items: Cross Sell & Upsell Data	Cross Sell & Upsell Data
First Image	Featured Image
Additional Images	Gallery Images

## Template Items | Matrix Items | Variable Products

MYOB Advanced Template Items are called variable products in Weka B2B. Variable Product template items can allow for several options by including a matrix of stock items; each stock item being one variation of the variable product. An example of a variable product is a t-shirt available in colours blue, orange, and red and in sizes S, M, and L.

Once you have finished editing and saved a template item in MYOB Advanced, a push notification will send the product data from MYOB Advanced to Weka B2B.

## Template Items Integrated Fields:

MYOB Advanced	Weka B2B
Description	Title
MSRP	Price
Default Price	Price/On Sale Price
Description Tab	Full Description
Item Sales Categories	Product Categories
Attributes	Attributes
Related Items: Cross Sell & Upsell Data	Cross Sell & Upsell Data
First Image	Featured Image
Additional Images	Gallery Images

## Matrix Item Integrated Fields:

MYOB Advanced	Weka B2B
Description	Description
MSRP	Price
Default Price	Price/On Sale Price
Attributes	Attributes
Related Items: Cross Sell & Upsell Data	Cross Sell & Upsell Data
Image	Image



## Kit Item to Simple Products

In MYOB Advanced, a kit is a non-stock item with a list of stock components. Each stock component is a stock item.

The Weka B2B Portal treats kit items as simple products with all the same fields as the stock item. When a customer orders the kit, we include the non-stock Inventory ID as an order line item. MYOB Advanced will then process the non-stock item like other simple products.

## Integrated Fields:

MYOB Advanced	Weka B2B
Description	Title
MSRP	Price
Default Price	Price/On Sale Price
Description Tab	Full Description
Item Sales Categories	Product Categories
Attributes	Attributes
Related Items: Cross Sell & Upsell Data	Cross Sell & Upsell Data
First Image	Featured Image
Additional Images	Gallery Images

## Live Inventory

The Weka MYOB Advanced push notification sends information on any changes in stock inventory directly to the Weka B2B Portal, allowing you to quickly and easily update your stock feed.

MYOB Advanced offers three types of inventory calculations: available, available for shipping, and available for issue. The Weka B2B Portal can work with all three available stock options based on your inventory preference.

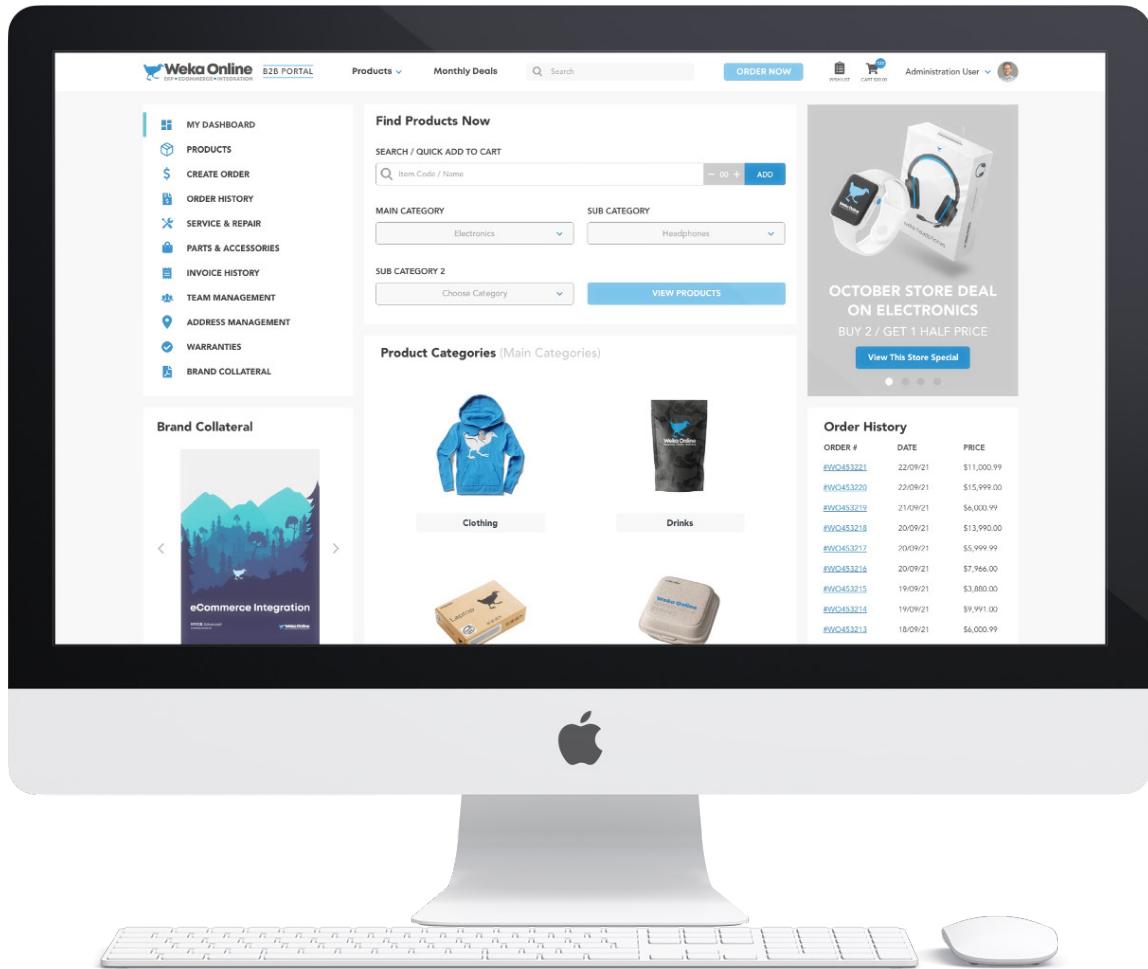
## Filtering

The Weka B2B Portal will scan and list all attribute options along the left panel, allowing customers to filter products based on product attributes. Customers then select an attribute option to show a list with only the required type of product.

## Search

The Weka B2B Portals offers an evolving search function, making it easier for customers to find the right product.

The customer can search by the MYOB Advanced Inventory ID, title, or full description. The search will prioritise exact matches over partial matches and show a list of both. Weka Online is constantly working to enhance its product searching techniques to improve search results.



## Product Documents

You have the option of displaying product documents on the product details page. Product files include safety datasheets, technical datasheets, specifications, and brochures.

The Weka connector retrieves stock item files from MYOB Advanced and uploads them against the product within the Weka B2B Portal.

During the discovery phase, a Weka consultant will discuss how to name your files in MYOB Advanced so that the B2B Portal can identify the document type.

## Sales Prices

Sales prices mean you can offer a unique pricing set for a customer or a group of customers. In MYOB Advanced customers are grouped by their customer price class, giving you the freedom to offer customer tier pricing.

The Weka B2B will calculate the customer price based on the pricing available to the logged-in user. The pricing formula is based on the default price or base price, the customer price class, and the customer-specific price. The calculated price will override the default price available to customers who do not have an assigned pricing structure.

**Example:** Andy has a price class of gold. For the product Weka Hoodie, gold is \$60, whereas the default price is \$90. When Andy views the hoodie on the Weka B2B Portal, he will see the price of \$60. The \$60 value will be carried through to the sales order.

## Sales Price Quantity Breaks

Offer your customers a better price in bulk by applying quantity breaks to your sales prices. For example, a price class of gold might have a value of \$60 for quantities 0-49 and \$55 for 55+.

## Sales Discounts

Sales discounts let you offer a discount to a customer or group of customers for a product or group of products. In MYOB Advanced, customers are grouped by their customer price class. Customer price classes give you the freedom to offer your customer tier pricing. MYOB Advanced groups items by item classes; the Weka sales discount function can work with both items and item classes.

Weka B2B will calculate the customer price based on the sales discounts available to the logged-in user. The formula is based on the default price or base price, the customer price class, and the customer-specific price, including the discounts available to the customer. The calculated price will override the default price available to customers who do not have an assigned sales discount structure.

**Example:** Marie has a price class of silver. The Weka Hoodie has an item class of TOPS. The item class TOPS has a sales discount of 40% for the price class silver. The end price shown to Marie is the default price discounted by 40%.

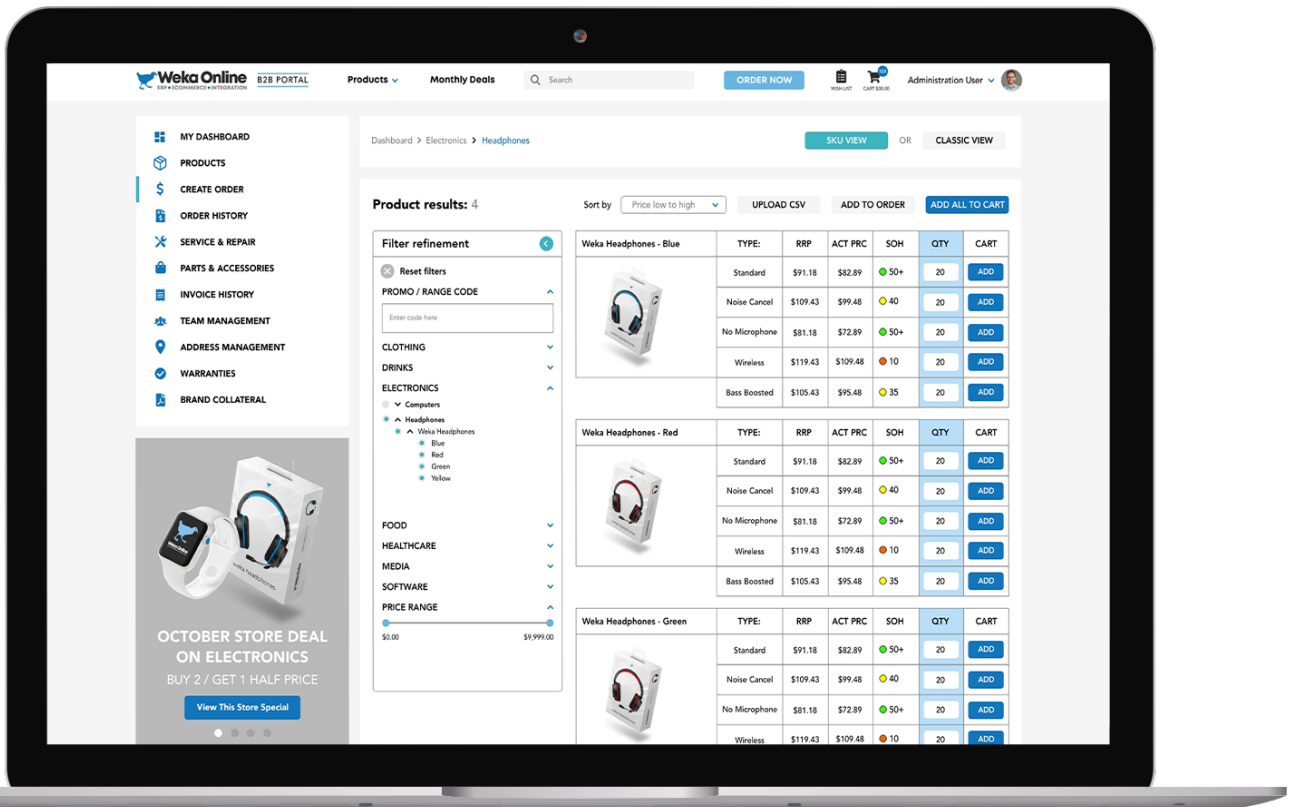
## Customer Specific Products

Customer-specific product means certain products you have identified as a “Customer Order” or “Special order items”. Such items have no ready market other than a specific customer.

A customer-specific product is only available to customers with the correct attribute assigned to their account to view and purchase.

Customer-specific products are suitable for organisations that distribute branded-specific products to their customers, for example, supplying bathroom consumables to hotels with the hotel’s branding.

MYOB Advanced uses customer attributes to assign the item sales category to the customer account.



## Multi Stock Locations

You can display stock available in multiple locations on the product display page and in the matrix grid. Each stock location can also determine if the customer can click and collect from the corresponding site.

The Weka connector will align a Weka B2B stock location with a MYOB Advanced warehouse. Adding a new warehouse in MYOB Advanced will create a new stock location in Weka B2B.

## Product Matrix Ordering

The Weka B2B Portal offers customers two ways of viewing products within a category: a gallery view and a product matrix view. The customer can easily toggle between the two views.

The product matrix view allows customers to order multiple products on one page. It displays the standard price, the customer price, and the available stock. The customer fills in the quantity input box on each line and clicks the add all to cart button.

## Ordering in Pack Quantities

Setting pack quantities against a product allows you to sell in incremental values for bulk ordering.

In the discovery phase, we will work with your MYOB Advanced partner to create a stock item attribute containing the step value. The step value will determine the quantity box increments for the product.

## Minimum Order Quantity

Setting a MOQ (Minimum order quantity) value against the product means you can specify the order amount as a requirement.

In the discovery phase, we will work with your MYOB Advanced partner to create a stock item attribute containing the MOQ value. The MOQ value will determine the minimum quantity of product a customer can order.

## Favourites ✓

Customers can tag a product as a favourite item, sending it to their wishlist. Customers can easily add a single or all favourite products to their cart through the Favourite matrix item view.

## Up-Sell / Cross-Sell ✓

Related items contain two types of products now available through the Weka B2B Portal: UpSell and Cross Sell.

**Up-sells:** These are products that you recommend purchasing instead of the currently viewed product. They are typically more profitable, better quality, or more expensive products. Up-sell products are displayed on the single product page underneath the product's description.

**Cross Sell:** You will find a list of cross-selling products below the cart on the checkout page. They are typically complementary items. For example, if you are selling a laptop, cross sells might be a protective case or a special adapter. Or if you're selling a Weka t-shirt, they could be a Weka hoodie and socks.

# Customers.

## Customer Two-Way Integration ✓

The Weka B2B Portal can work with customers and contacts based on your preferences. We recommend creating an attribute against the customer or contact labelled "Allow Weka B2B". The attribute information syncs on whether the customer or contact can become a Weka B2B customer.



Customer and contact details updated in MYOB Advanced will flow through to the Weka B2B Portal, and vice versa when a customer updates their details.

When a customer updates their address under address management, the Weka B2B Portal will update the corresponding address in MYOB Advanced.

## Address Management

Customers can manage multiple shipping addresses in the Weka B2B Portal, creating a new address using Google Maps to look up and confirm the location.

The customer can edit existing addresses and also remove unused addresses. The customer can label each address to organise the list of locations efficiently.

## Multiple Delivery Addresses

The Weka B2B checkout includes a select box above the shipping address. The selector contains a list of shipping locations. When the customer selects a shipping location, the checkout shipping address changes to match the shipping location.

## Team Management

The Team Management section lists contacts under the customer from MYOB Advanced. Team Management will only show contacts allowed by Weka B2B, determined by an attribute.

A Weka B2B user can update existing contacts and add new users to the customer account. The connector will send new user data to MYOB Advanced, creating a customer contact. The user can also remove contacts from the Weka B2B Portal.

## Team Role Manager

The Weka B2B Portal has a built-in role manager, restricting certain user types from accessing parts of the Portal. Users can have different access levels to the Weka B2B Portal, with some able to manage invoices, teams, and addresses, and other users only able to create sales orders.

During the discovery phase, we can discuss the access levels required in your Weka B2B Portal.

## Payment Terms

A payment term dictates the payment methods available to the customer in the Weka B2B Portal. Customers on account must settle their balance based on payment terms, with the additional option of paying by credit card. A COD customer will only have the option of paying at the time of purchase via bank deposit or credit card.



Weka B2B will retrieve the customer payment terms from MYOB Advanced as part of your customer two-way integration. In the discovery phase, a Weka consultant will help map payment terms to payment methods.

## Credit Hold

You can set a customer's account status to credit hold. When a credit hold customer signs into Weka B2B, they will see an onscreen notification informing them to contact accounts about their account.

The customer can still place an order on the B2B Portal. You will then receive an email notification about the new order. The message will inform you of the customer credit hold, and you will need to take the credit hold off before you can send the order to MYOB Advanced.

Prohibiting the sales order from processing in MYOB Advanced prevents you from sending out goods to customers who have not paid their bills.

## MailChimp Integration

Mailchimp for WooCommerce is a WordPress plugin that lets you add your WooCommerce customers and their order information to your Mailchimp audience. Use WooCommerce data to track sales, create targeted e-commerce automation, generate personalised product recommendations, send abandoned cart emails, and more.

## Klaviyo Integration

Klaviyo pulls real-time data from your WooCommerce store and tech stack, which you can then use to send highly personalised, retention-building emails and SMS.

# Checkout.

## Fast Checkout

The Weka B2B checkout experience has been designed to maximise ease of use and checkout speed. The Weka B2B Portal instantly retrieves billing and shipping information from MYOB Advanced. To complete checkout, customers simply agree to the terms and click on place order.

## Fast Order Process

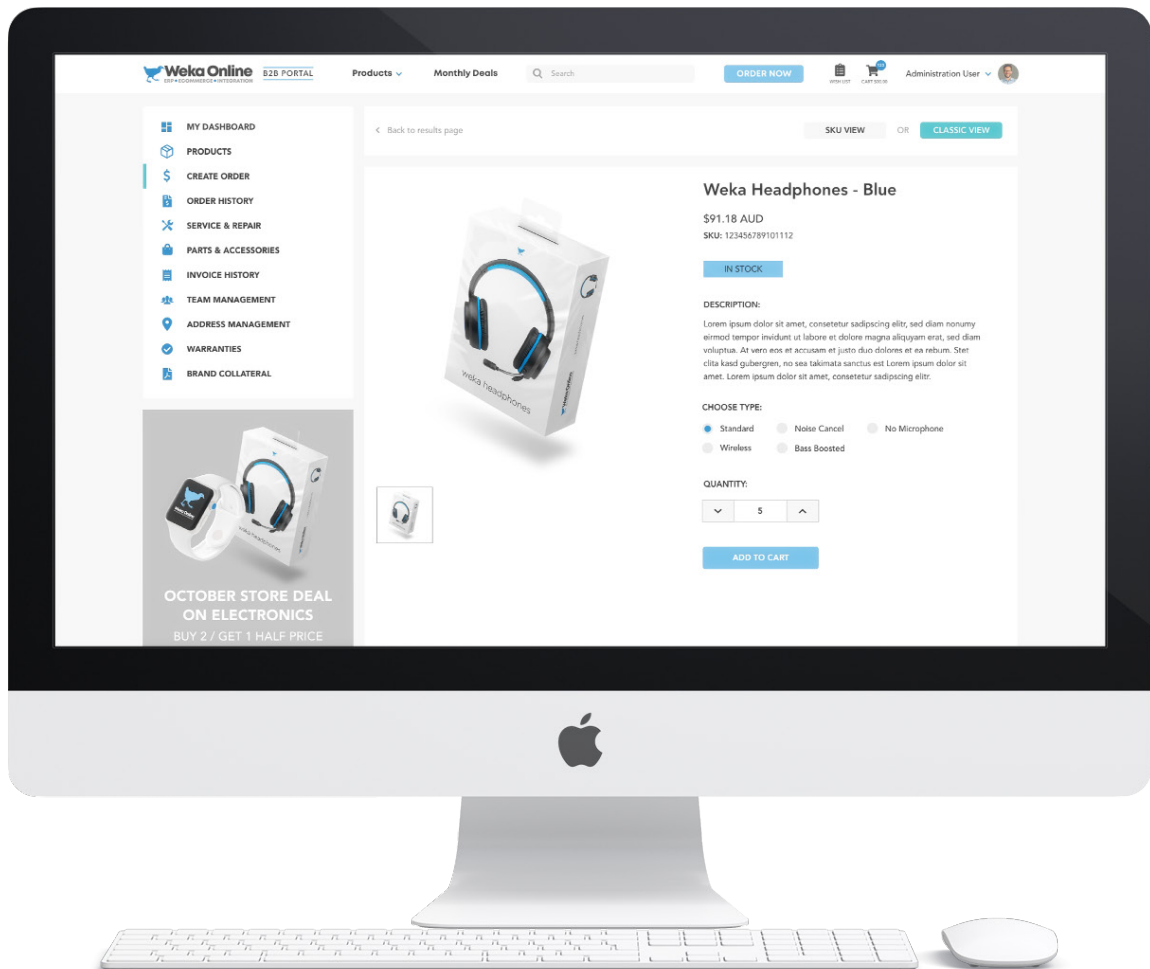
The Weka B2B Portal uses WooCommerce webhooks to send sales orders directly to MYOB Advanced. The webhook is activated when the customer places their order, giving you rapid access to the order information in MYOB Advanced.

As the sales order is processed and filled, MYOB Advanced updates the Weka B2B Portal with status updates through push notifications.

## Payment Options

With Weka B2B you can access all the payment methods built for WooCommerce. These include plugins for all New Zealand and Australian banks, Stripe, PayPal, eWay, and AfterPay, and many more payment options.

In the discovery phase, we will explore the payment methods you want to offer your customer and research their feasibility. In addition to the WooCommerce payment methods, Weka has built its own On Account payment method connected to MYOB Advanced.



## Shipping Methods

WooCommerce allows you to create custom shipping methods. In the discovery phase, we will explore the shipping methods you require and research the feasibility of each shipping option requested.

## Shipping Integration

WooCommerce offers many different shipping integrations. In the discovery phase, we will explore the shipping integrations you require and research the feasibility of each method requested.

## Click and Collect

Click and collect is a fully integrated feature of Weka B2B. You can assign a MYOB Advanced warehouse location to each Weka B2B click-and-collect location. Weka B2B can also set a ShipVia value on the sales order for every click-and-collect site.

## CSV Cart / Order Export

Customers can export their existing cart or a past sales order into an importable CSV file. After exporting a CSV file, they can edit the current values in the cart on the CSV file and upload it again to readily create a new sales order.

## CSV Cart Import

The Weka B2B cart import feature allows customers to edit mass products in a CSV file and upload the file back into the cart. The uploaded file will override the quantity values in the cart.

## Notify When Back In-Stock

The product details page includes a “notify when back in-stock” action. Clicking the button saves the customer’s details in the back-in-stock database. When MYOB Advanced pushes the stock back into the website, the customer will receive a back-in-stock email notification from the website.

## Promotional Codes

The Weka B2B Portal takes advantage of WooCommerce's robust coupon code management system. You can create coupons based on a fixed cart discount, product discount, or cart percentage.

The coupon management system has extensive functionality, including free shipping activation, minimum spend, expiry date, and user restrictions.

## Draft Orders

Customers who manage multiple orders on the go can do this on the Weka B2B Portal. At checkout, the customer can either process the cart or save the order as a draft.

The draft orders section lists all the available active draft orders. Users can edit a draft order to update the cart with changes.

## Gift Cards

Customers can use a gift card to either partially or fully pay for a sales order. In MYOB Advanced, the Portal assigns the gift card to a non-stock item. When the Weka connector sends the order line item data to MYOB Advanced, the gift card will show as the nominated non-stock item. Your MYOB Advanced partner can create a report to track and ascertain the performance of gift cards.



## Multi-Currency

The power of eCommerce means borders no longer dictate your business. Global customers can purchase your products in their local currency on one e-commerce Portal.

The Weka sales order integration sends the monetary value to MYOB Advanced in the customer's currency.

# Orders.

## Order History

The order history lists all the orders created by the customer and their respective contacts. The Weka B2B Portal displays the MYOB Advanced Order ID for easy administrative handling using one order ID, not two.

The Weka integration monitors sales orders in MYOB Advanced for updates in order status and will update the respective order under the order history.

The order details page outlines the status, billing and shipping details, and order summary information.

## Order Tracking

The Weka connector actively monitors shipments through the MYOB Advanced push notification system. The connector retrieves the courier provider, tracking link, and tracking number from the shipment package.

The sales order details page shows the tracking information with a link to the shipping details provided by the courier.

## Freight Integration (Starshipit) ✓

The Weka B2B Portal integrates with the courier provider Starshipit. The Starshipit integration retrieves the shipping price at the checkout stage and will send the sales order to Starshipit for shipment processing.

If you require integration between MYOB Advanced and Starshipit, we have this available at a separate cost.

## Order Templates ✓

Order templates offer your customers a way to add a collection of products to the cart. An example of an order template is a summer range or clearance collection.

The Weka B2B Portal lists the order templates under a page with a custom label, Range or Collection. The customer downloads a collection, fills the quantity box, and can import the CSV file into the cart.

## Partial Shipping ✓

It is not uncommon to partially ship a sales order on a line-by-line basis as you receive stock from suppliers. Weka Online integrates with MYOB Advanced to show the customer an ongoing update on the items sent from the warehouse.

The Weka connector will retrieve the quantity shipped and the status of the order line item. Weka B2B will display the data under the sales order history and update the sales order status to partially shipped.



## Order Approval

Using a contact attribute, you can assign MYOB Advanced contacts to different access levels. An access level determines whether a user can order without approval, requires approval, or can approve orders.

If the user requires order approval, the order will sit in a list of pending orders. Each customer contact with approval order capability then receives an email notification about the pending order with a link. The customer contact clicks on the link and sees a button to approve the order. Clicking the button sends the order to MYOB Advanced.

Customer contacts with approval order capability can access a new section called Orders to Approve. The Orders to Approve page lists pending orders, with a quick action button next to each order.

## Order Return Management

Weka B2B customers have the option of requesting either a total or partial return on a sales order. The customer specifies the products in the return request, which sends an action to the Weka B2B administrator.

The administrator has the option of accepting or rejecting the return. If the administrator agrees with the return, the Weka connector will create a sales order-type credit memo in MYOB Advanced.

# Invoices.

## Invoice Statement

The Weka B2B Portal lets your customers view their invoice statements online. Customers can view the details of both open and closed invoices and all the details of their account history.

Customers can filter and sort the invoice summary by all summary fields available. The Weka B2B Portal aligns the invoice ID/num with the same ID in MYOB Advanced. If a customer enquires about an invoice, you can quickly look up the invoice in MYOB Advanced.

Each invoice listed in the invoice summary links to an invoice details page. In the invoice details screen, you can view all invoice line items and the summary information extracted from MYOB Advanced.

## Invoice PDF Download

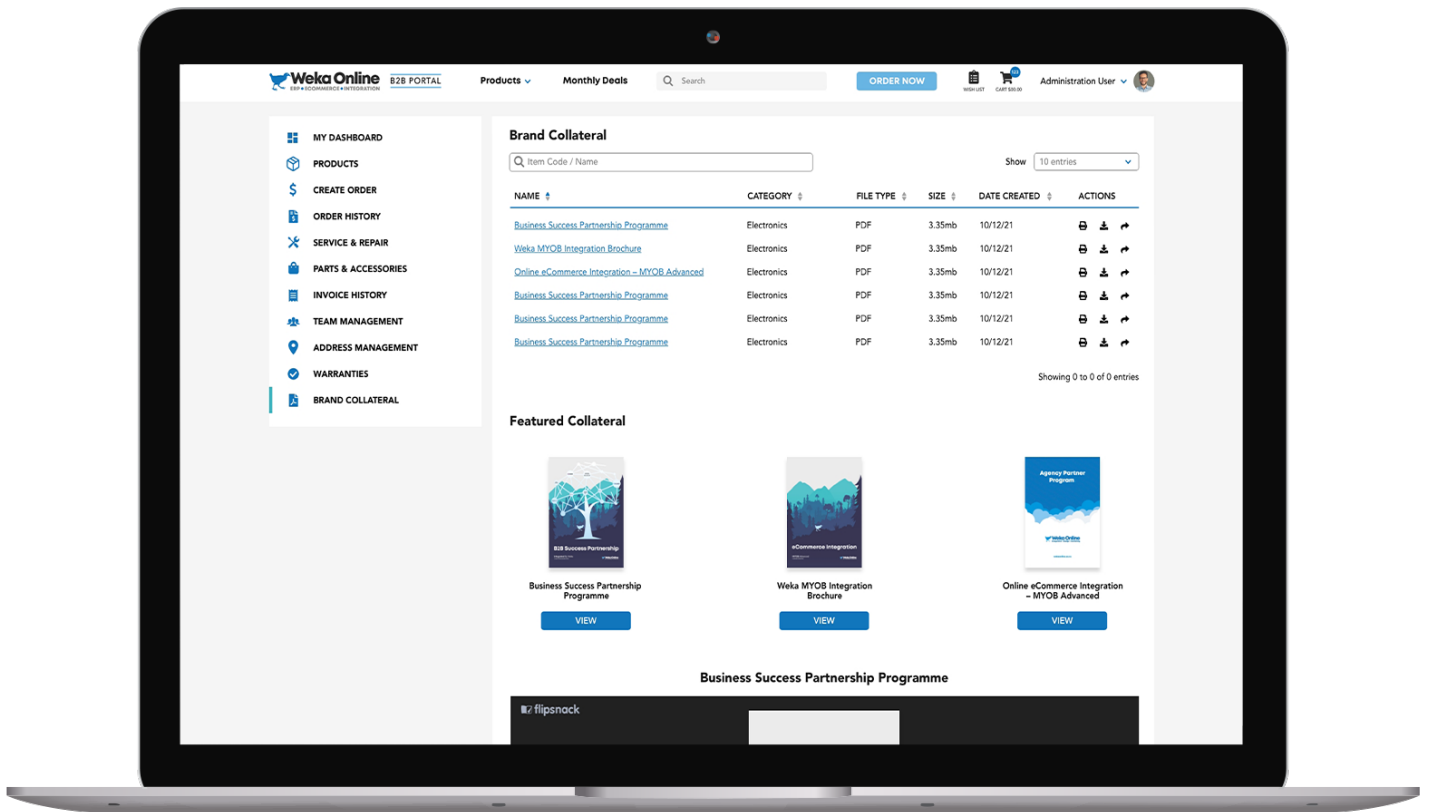
Customers can download a copy of an invoice as a PDF from the invoice details screen. The Weka integrator extracts the file from MYOB Advanced as part of the invoice integration process.

Please note, that for invoice PDF download to work, you must ask your MYOB Advanced partner to set up saving a copy of the PDF printout as a file against the invoice.

## Invoice Payment

Invoice payment gives your customers the ability to pay their invoice balance or a single invoice online. The Weka B2B Portal includes an invoice payment portal built to work with the various payment methods offered by WooCommerce.

Once you have reconciled payments in MYOB Advanced, the Weka connector pushes updates back into Weka B2B, updating the balances of each paid invoice.



# Quotes.

## Quote Management ✓

When a customer makes a Weka B2B quote, the Weka integrator sends the data to MYOB Advanced in the form of an opportunity. The Weka integrator will update the opportunity as the customer adds items to the quote.

Customers can accept or reject the quote in the Weka B2B Portal. An accepted quote now becomes part of the cart and the customer can process the cart into a sales order. A rejected quote will email the MYOB Advanced nominated sales representative a rejection notification.

# Website.

## Customisable Layout

The Weka B2B Portal has various customisable options with a live onscreen preview of the changes as you make them. You can swap out the logo, alter the primary and second colours, update the banners and advertisements, and edit the footer, to name a few.

You can change the Portal's layout with minimal training and no coding knowledge. In the implementation phase, your Weka consultant will teach your team how to customise the Portal.

## Brand Collateral

Brand collateral is a way to present your customers with a library of current product brochures and branding material. Brand Collateral refers to all media used to promote the brand and support the sales and marketing of a product or service.

## Hosted Environment

Our hosted Weka B2B instances include dedicated CPU, memory and IP for every site. It features a web application firewall and dynamic malware defences with optimised rule sets/blocklists for elite security.

We run daily backups of your Weka B2B site with up to 30 days of storage.

## Google Login ✓

Google login means your customer can log in to Weka B2B with their Google account. The customer must first have an account in MYOB Advanced with an email address aligned to their Google account.

Once the customer connects their Google login to the Weka B2B account, they can log in with a simple click of the Google login button.

## Facebook Login ✓

Facebook login means your customer can log in to Weka B2B with their Facebook account. The customer must first have an account in MYOB Advanced with an email address aligned to their Facebook page.

Once the customer connects their Facebook login to the Weka B2B account, they can log in with a simple click of the Facebook login button.





# Weka B2B Pricing.

## Plan

### Standard

### Plus

### Enterprise

**Implementation** (excl GST)

\$11,571.43

\$14,428.57

\$21,571.43

**Monthly** (excl GST)

\$980.00

\$1,450.00

\$2,700.00

All prices are subject to change without notice.

## Product Features

Stock Items	✓	✓	✓
Non Stock Items	✓	✓	✓
Variable Products   Template Items		✓	✓
Kit Item		✓	✓
Live Inventory	✓	✓	✓
Filtering	✓	✓	✓
Search	✓	✓	✓
Documents		✓	✓
Sales Pricing	✓	✓	✓
Sales Discounts		✓	✓
Customer Specific Products		✓	✓
Multi Stock Locations			✓
Product Matrix Ordering	✓	✓	✓
Quantity breaks		✓	✓
Ordering in Pack Quantities		✓	✓
Minimum order Quantity		✓	✓
Favourites	✓	✓	✓
UpSell/Cross Sell	✓	✓	✓

## Customer Features

	Standard	Plus	Enterprise
Two Way Integration	✓	✓	✓
Payment Terms	✓	✓	✓
Address Management	✓	✓	✓
Multiple Delivery Addresses p/c	✓	✓	✓
Team Management	✓	✓	✓
Team Role Manager		✓	✓
Credit Limit Hold		✓	✓
MailChimp Integration	✓	✓	✓
Klaviyo Integration	✓	✓	✓

## Checkout Features

Fast Order Process	✓	✓	✓
Fast Checkout	✓	✓	✓
Payment Options	✓	✓	✓
Shipping Methods	✓	✓	✓
Shipping Integration	✓	✓	✓
Click and Collect	✓	✓	✓
CSV Order Import		✓	✓
CSV Cart Export		✓	✓
Notify when back in stock		✓	✓
Promotional Codes		✓	✓
Draft Orders			✓
Gift Cards	✓	✓	✓
Multi Currencies			✓

## Order Features

	Standard	Plus	Enterprise
Order History	✓	✓	✓
Order Tracking	✓	✓	✓
Freight Integration (Starshipit)		✓	✓
Order Templates		✓	✓
Partial Shipping			✓
Order Approval			✓
Order Return Management		✓	✓

## Invoice Features

Invoice Statement	✓	✓	✓
Invoice Download		✓	✓
Invoice Payment		✓	✓

## Quote Features

Quote Management		✓	✓
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## Website Features

Customisable Layout	✓	✓	✓
Brand Collateral	✓	✓	✓
Security/FireWall	✓	✓	✓
Google Login		✓	✓
Facebook Login		✓	✓

# How to book a live demo with us?

[Click here.](#)

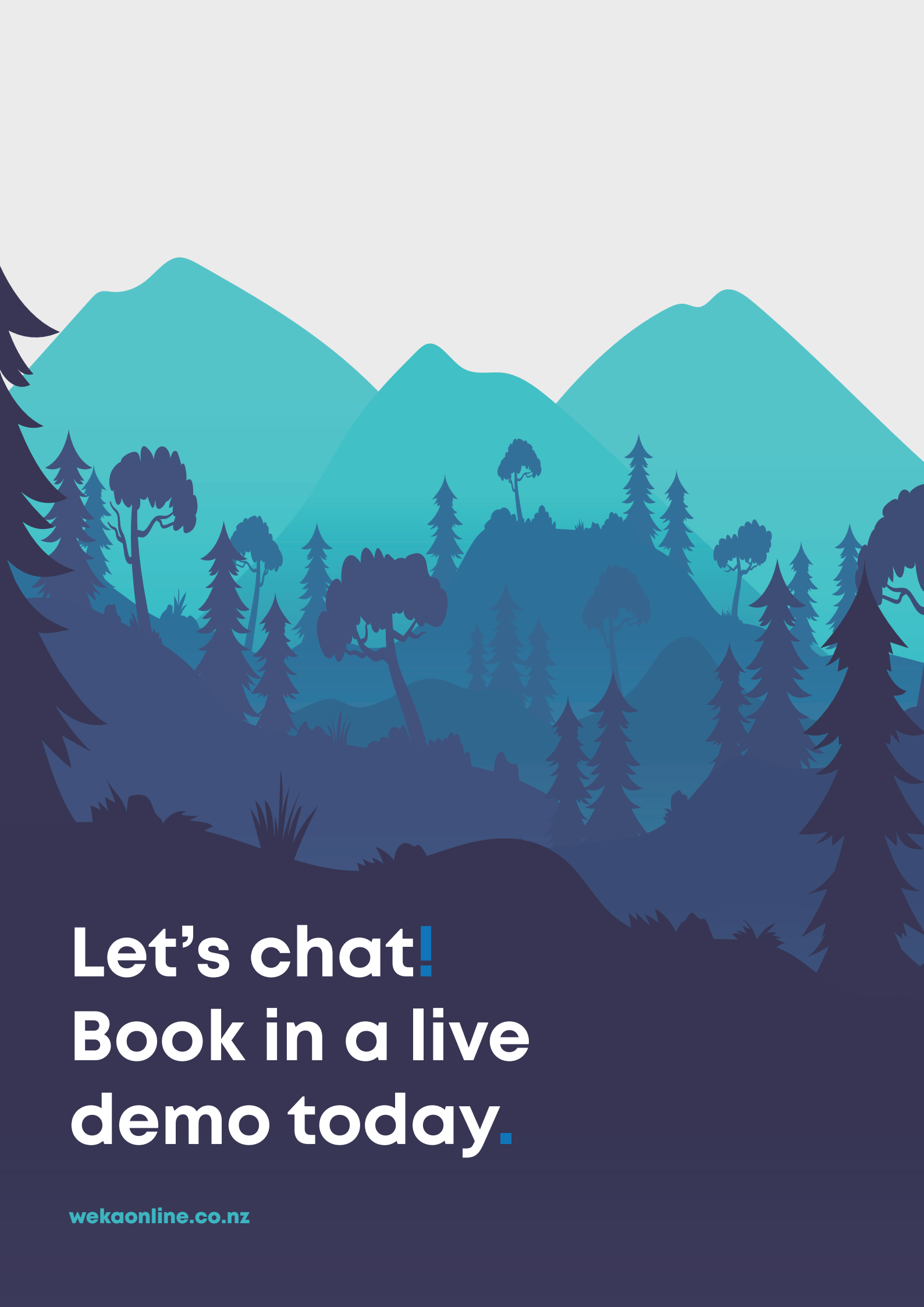
**Book in a one-on-one engagement  
live demonstration meeting, with us on a  
day and time that suits you. We are looking  
forward to hearing from you today!**



**Or if you like, email or call us below.**

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**Let's chat!**  
**Book in a live**  
**demo today.**

[wekaonline.co.nz](http://wekaonline.co.nz)