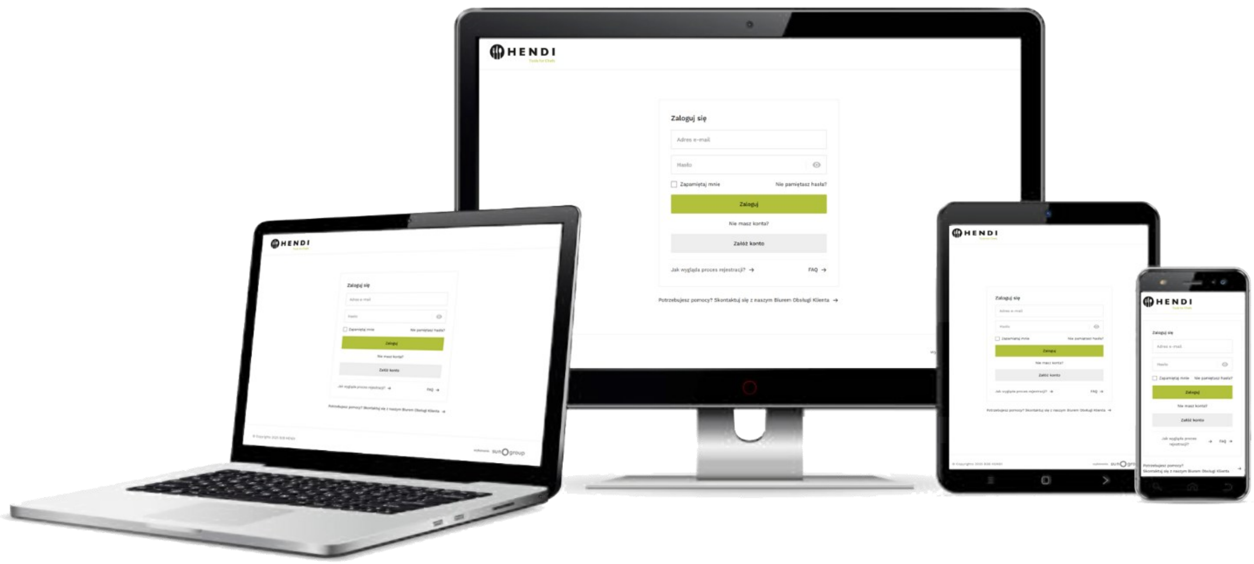
Manual

Platform B2B HENDI



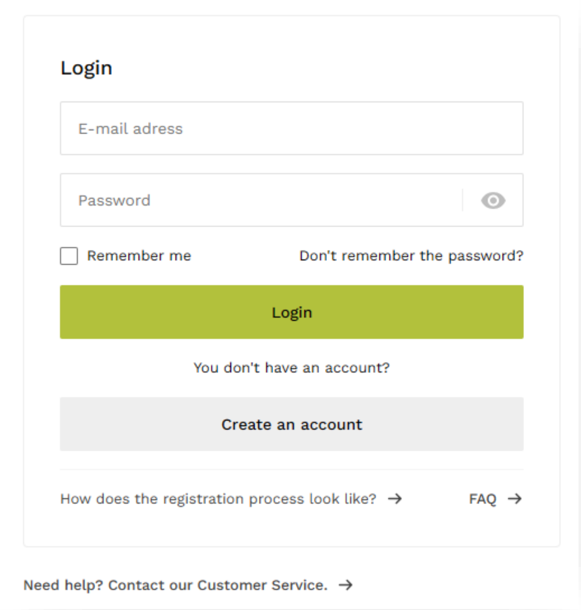
v. 102025v2_RK

Contents

Login and password reset

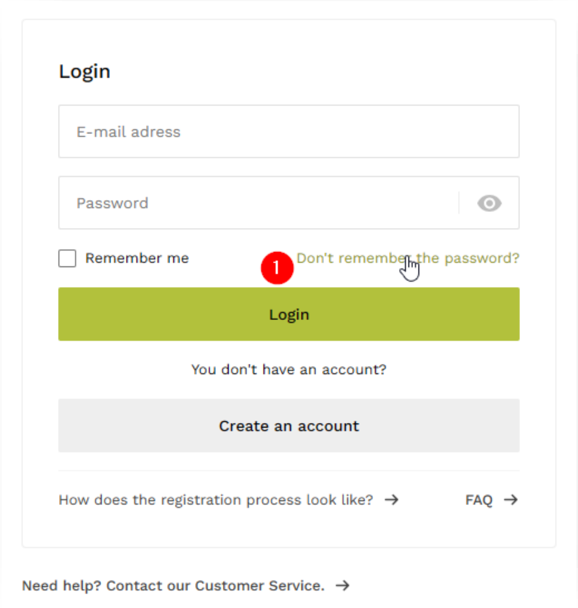
1. Logging in to the B2B platform

After receiving your login and password for the B2B platform, go to http://b2b.hendi.com and fill in the appropriate fields, then click **Login**.

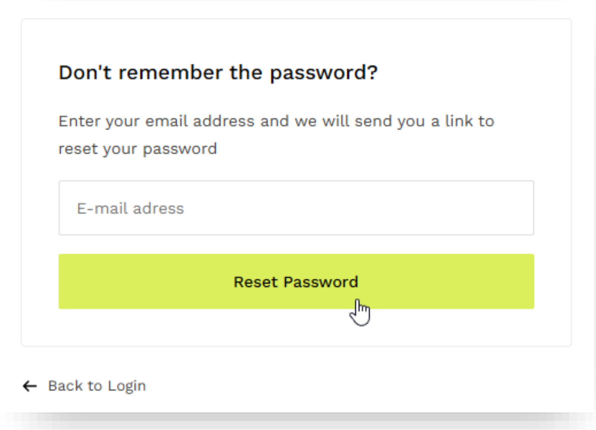


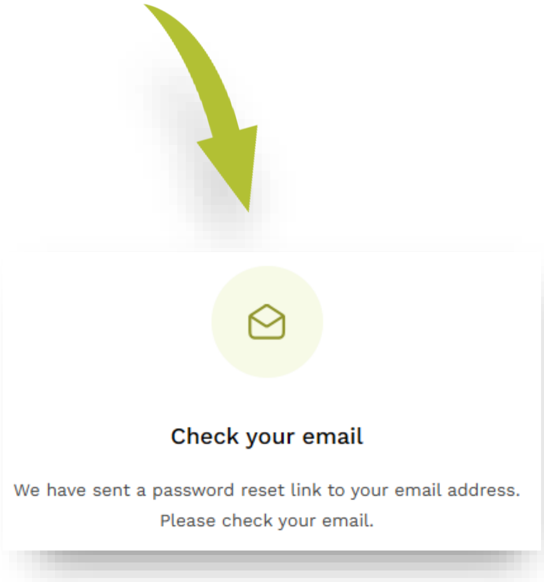
2. Resetting the password to the B2B platform

While on the login page, click on the link **Forgot your password?**

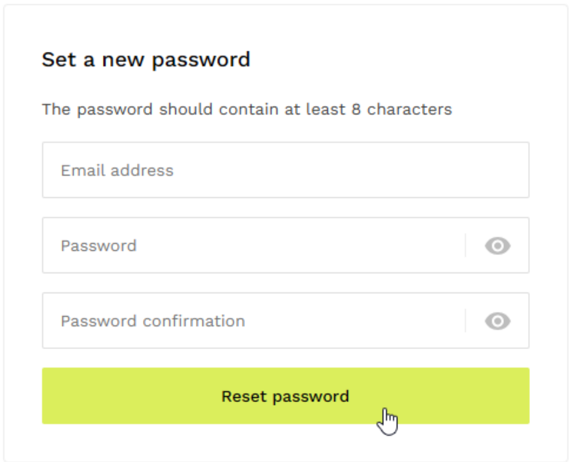


Moving to a new page, enter the email address to which the account has been assigned and click **Reset Password**. As confirmation we will receive an appropriate message.



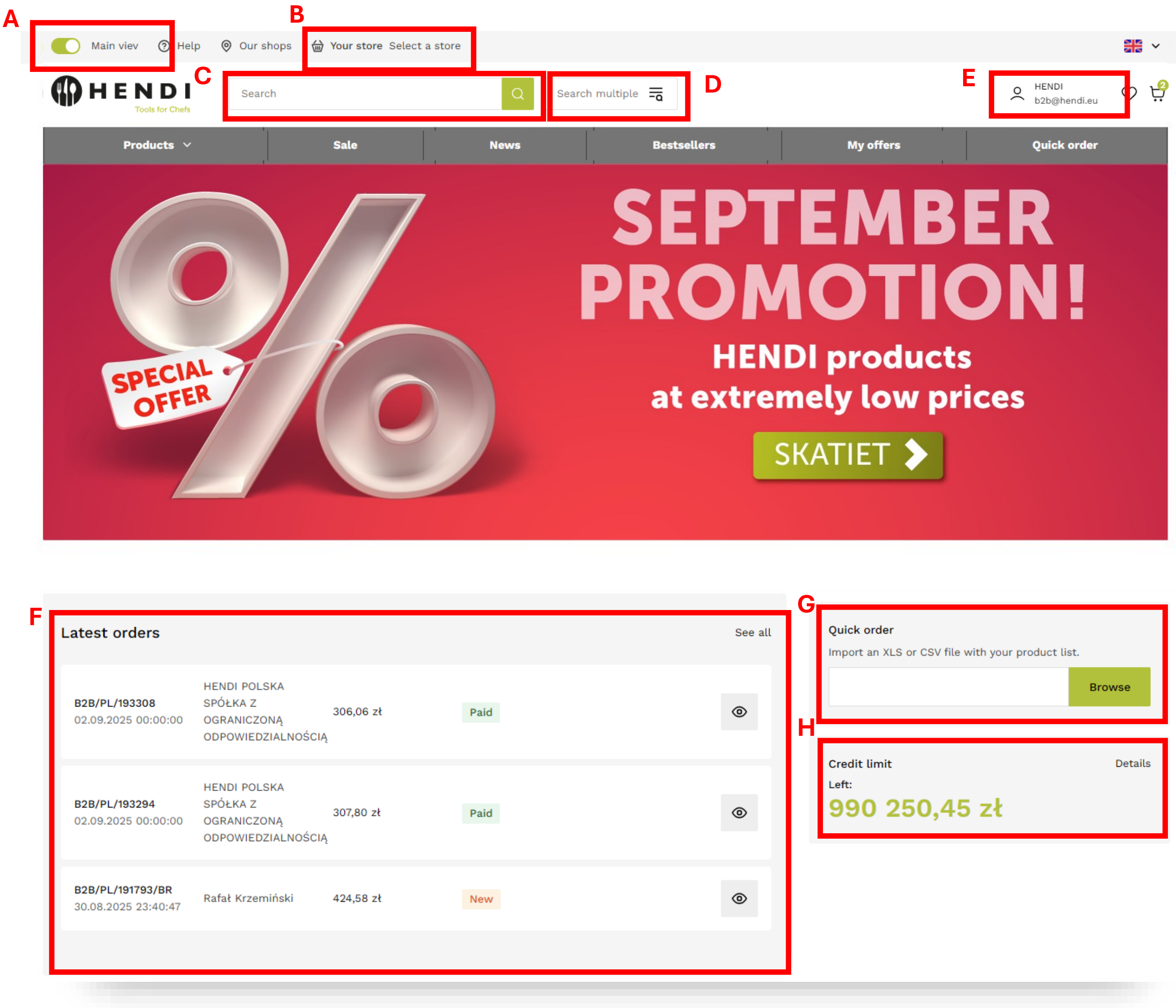


A message with a link to the password reset page will be sent to the email address provided. Enter the new password and click **Reset password**. If you don't receive an email, please check your SPAM folder.



If everything has been done correctly we will be taken directly to the main page of the B2B platform.

Home page



After logging into the platform, you will be presented with the home page, where you can find, among other things:

- **A)** **Change view mode** - the ability to change the page view from Main/Full to Simplified, which is limited to adding orders
- **B)** **Your store** - possibility to choose one of the HENDI company stores to which we have a quick view of the stock (view available only for PL contractors)
- **C)** **Product search engine**
- **D)** **Search multiple** - allows you to search for several products by SKU at the same time.
- **E)** **Customer panel**
- **F)** **Listing with recent orders**
- **G)** **Quick orders** - possibility to import products with their quantity from .XLS/.CSV file
- **H)** **Credit limit** - information showing currently remaining credit limit

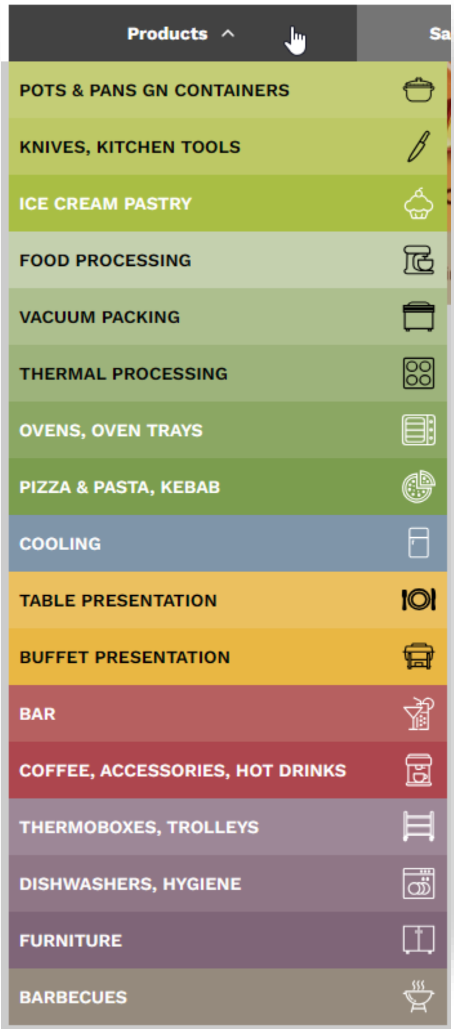
Product search

Hendi's B2B platform allows you to search for products in three ways:

- categories
- search bar
- search multiple module

1. Categories

To search for the product you are interested in, select the appropriate category from the list located in the menu under the **Products** button.



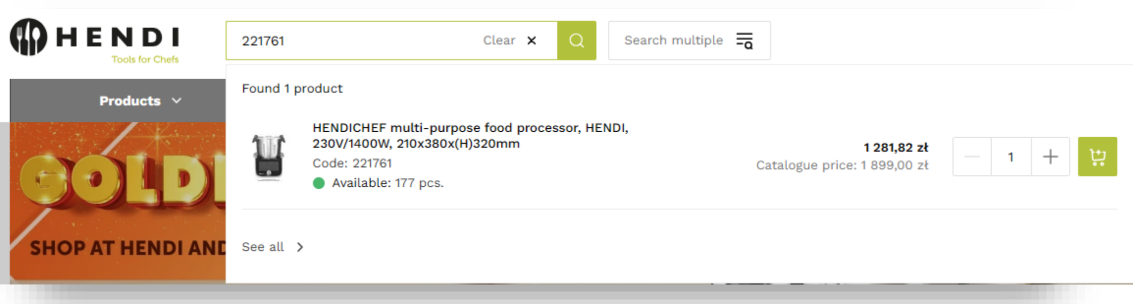
Did you know?

The category menu has been arranged according to the category list contained in the paper catalog.

2. Search bar

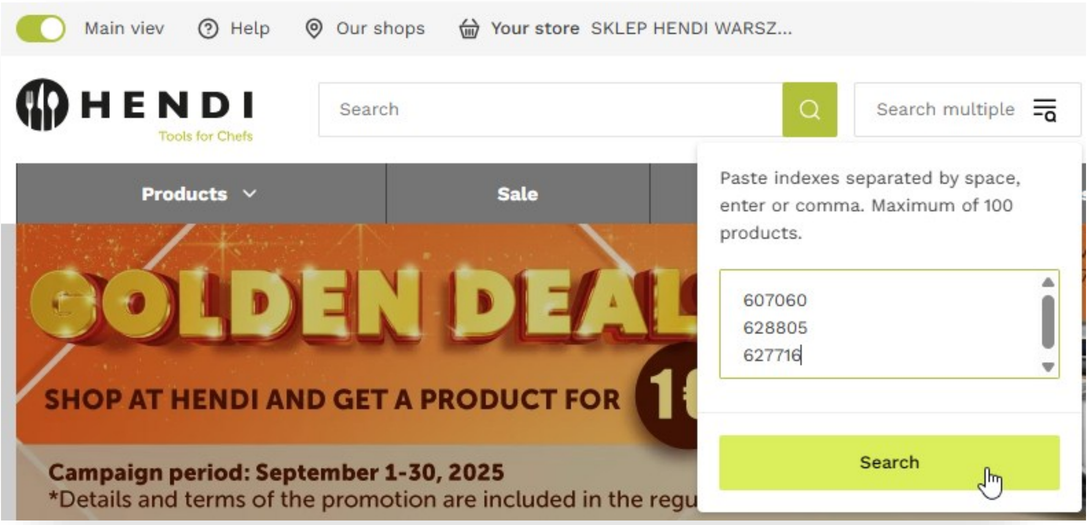
Another way to search for products is the "Search bar".

To find the product you are interested in, just enter the Product Code or Product Name in the field shown below and after a moment a hint of the product you are looking for will appear. After clicking **ENTER**, you will be taken to the search page.



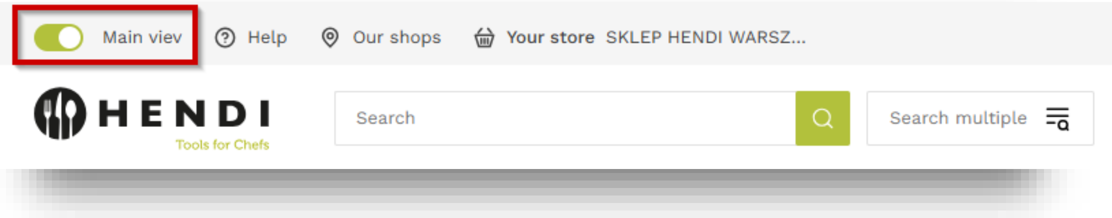
3. Search Multiple

With this option, we can search for up to **100 products** by pasting their SKU (product code) separated by space, enter or comma.

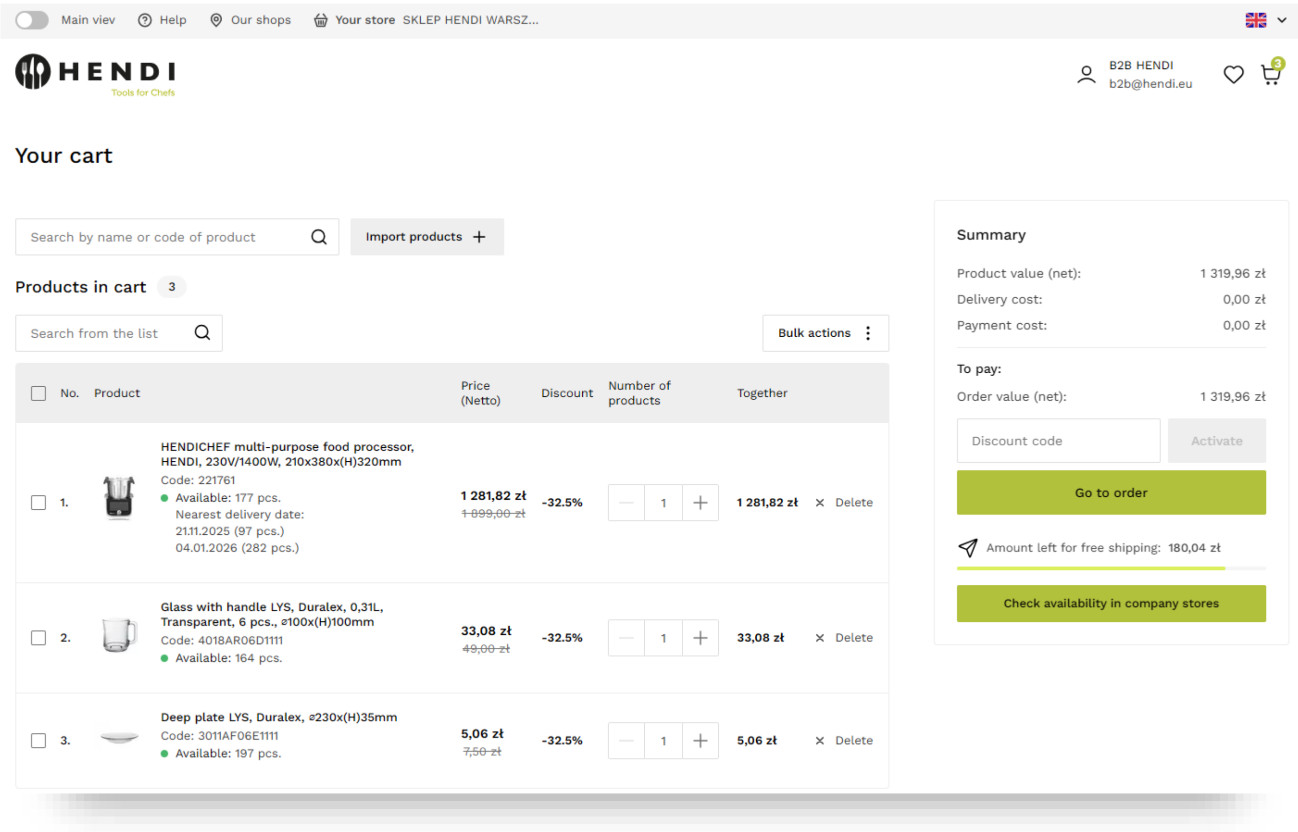


Main view

The **Main View** option, located in the top left corner, allows you to switch the page layout from the extended version - which includes a banner, product search, and menu bar, etc. - to a simplified one



Simplified view is limited to displaying only the shopping cart, where we can add products and fully place an order.



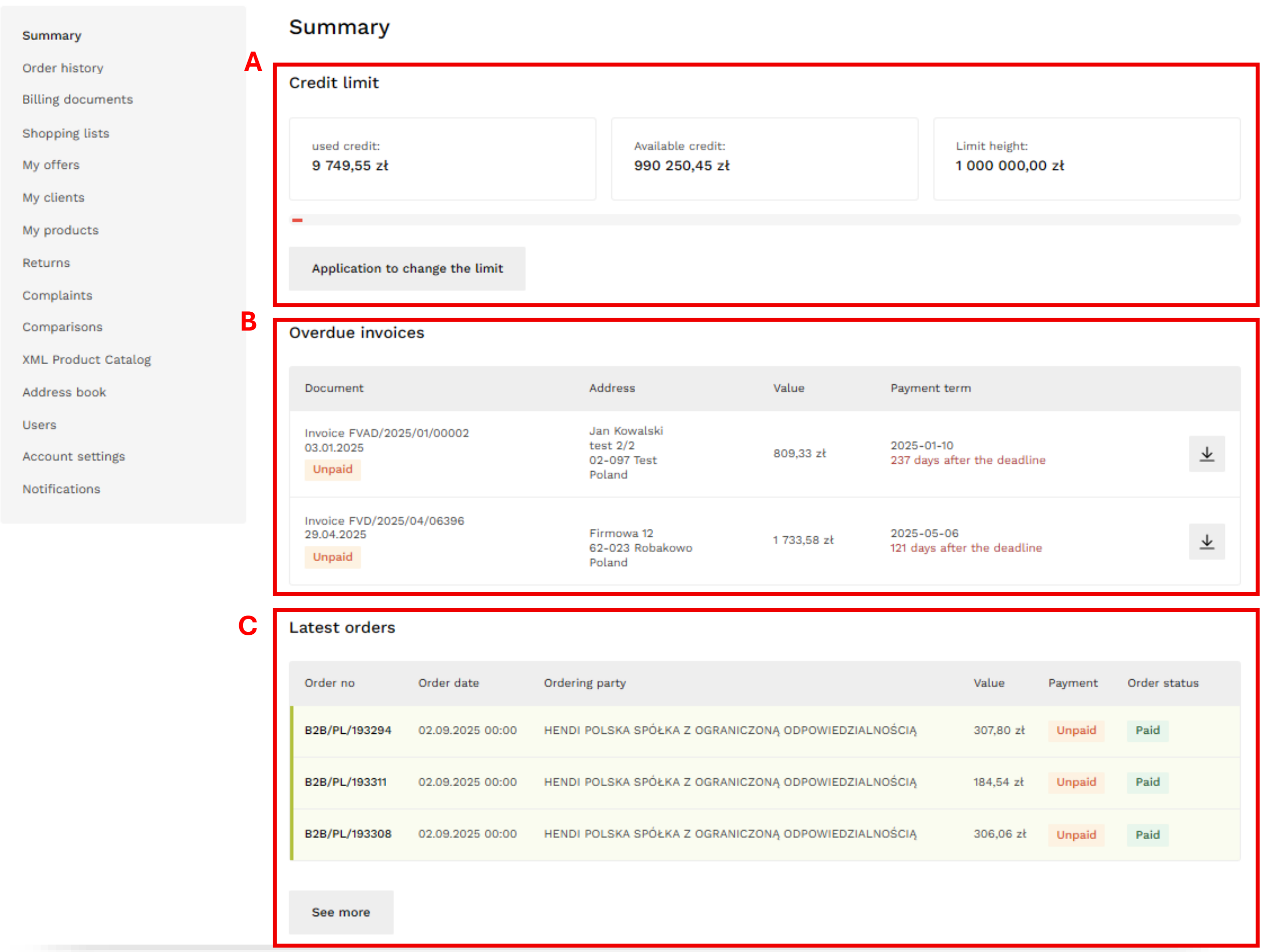
Customer panel

The customer panel is our command center. Addition to the basic data of our company, available credit limit or addresses of our customers, we will find there several other important sections. The availability of each section depends on the user's current role.

1. Summary

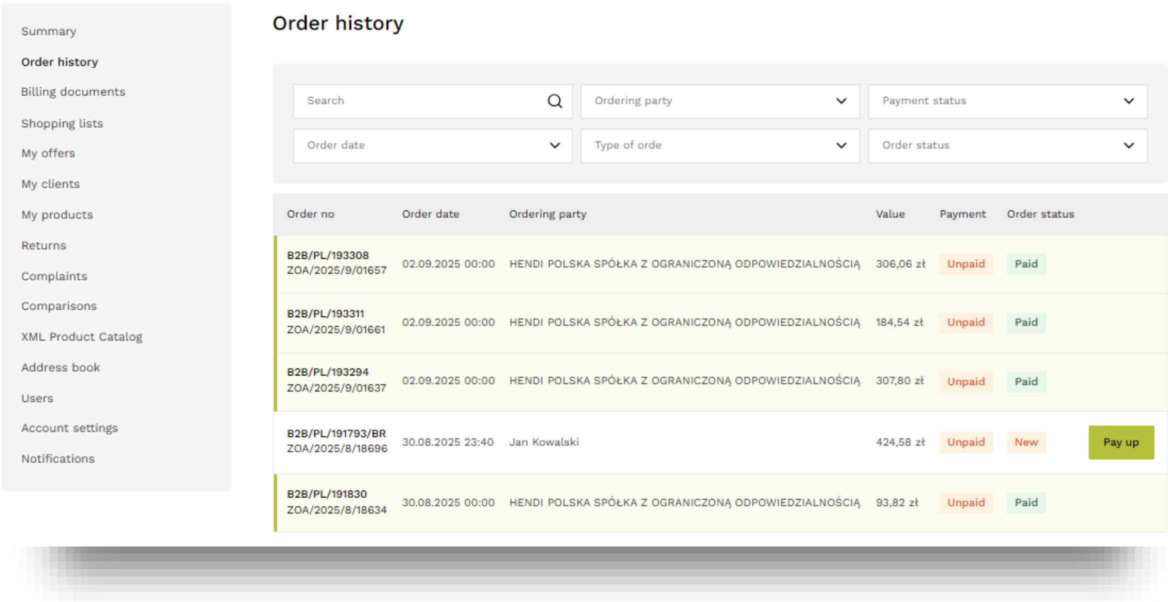
Going to the Customer Panel, the first and at the same time the main page is the Summary section. Here we can find information about:

- **A. Credit limit** - a breakdown of currently used and available funds and the amount of our total limit.
- **B. Overdue invoices** - a table with unpaid invoices. Addition to basic invoice data, we have the option to download the invoice.
- **C. Recent orders placed**



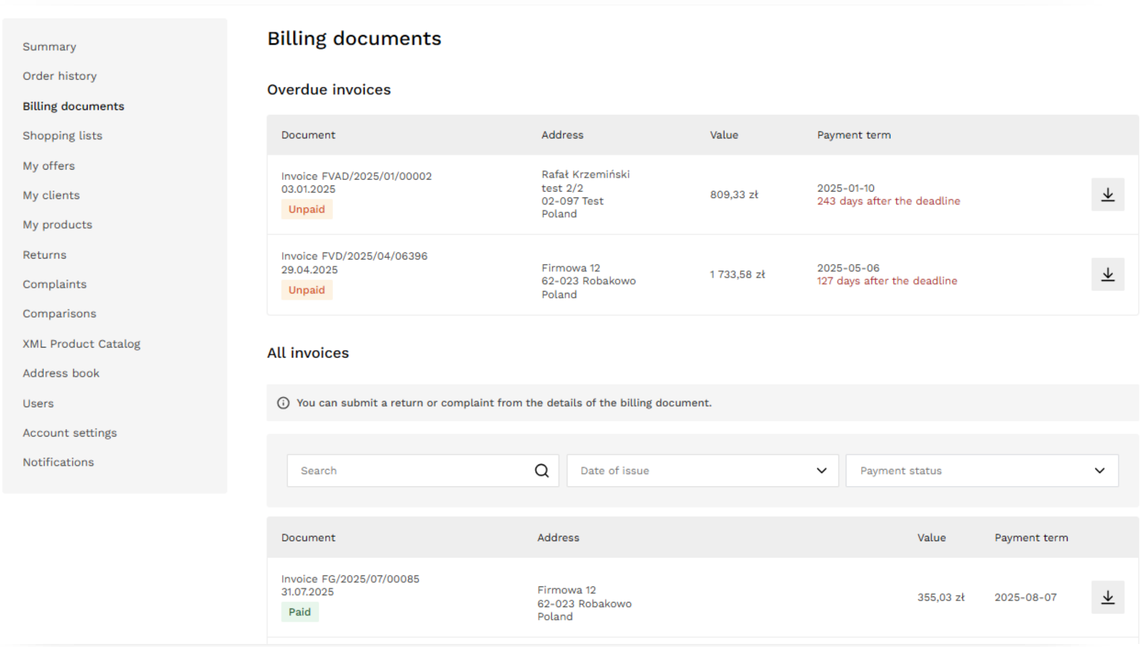
2. Order history

Depending on your user role, order history is available either in FULL or only to the user placing orders. It is possible to search for an order by: product code, phone number, shipping number, order number, own order number, delivery address, email address, ordering user, payment status, order date, order type, and order status. By entering several pieces of information after the comma in the **Search** field, e.g., phone number and email address, you will get a more accurate result.



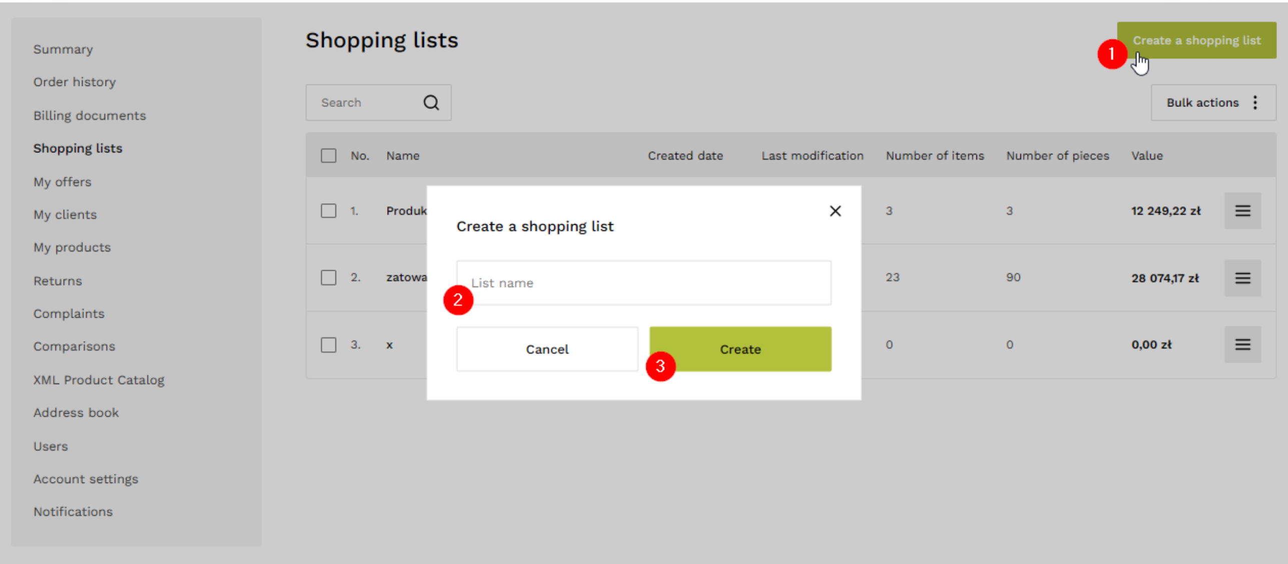
3. Billing documents

Here we can find invoices (both paid and unpaid) for our orders. As with order history, here you can also search for documents by invoice number, delivery address and payment status.

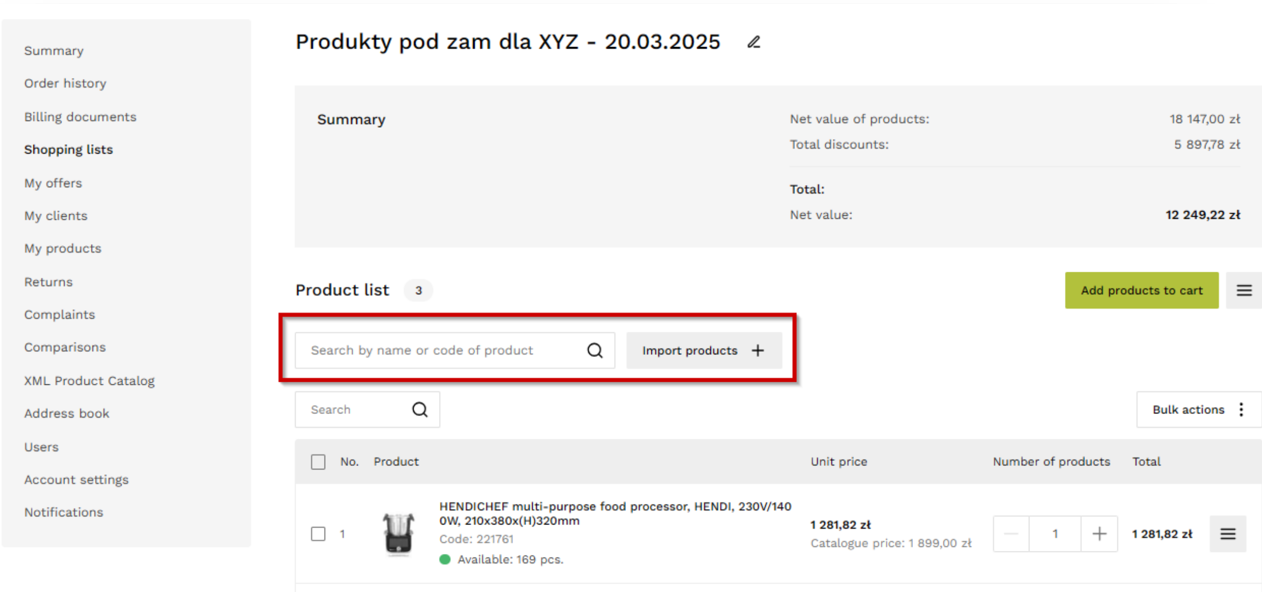


4. Shopping lists

If we have products that we frequently order or we have end customers for whom we often fulfill a similar set of products, we can use the option of purchasing lists. To create such a list, click **Create Shopping Lists**, then provide a list name and click **Create**.



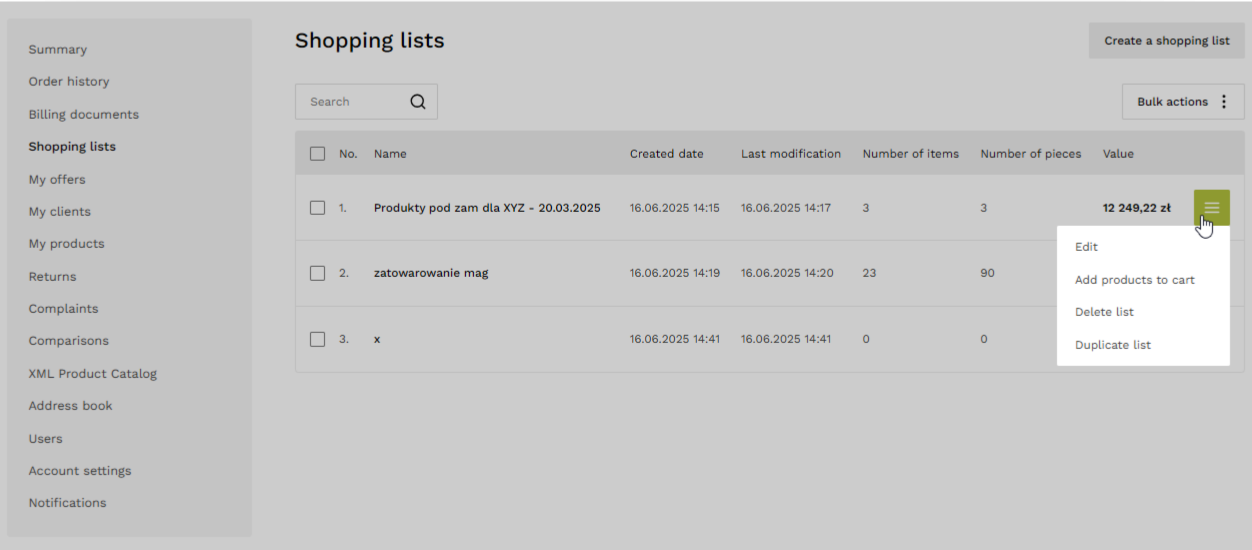
After creating the list, we will be taken to a page where we can add products using the search engine or importing products from a file.



The added products are automatically saved to the shopping list. To add products to the shopping cart, we click **Add products to cart**. We can add to the shopping cart all products from the list or only those which we have previously selected.

from the listing, we can manage our shopping lists by:

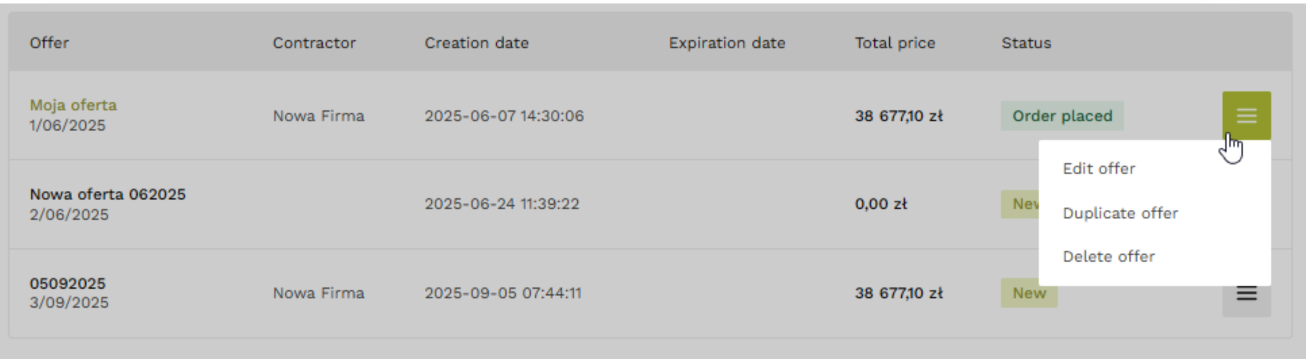
- **edit**,
- **add products to cart**,
- **duplicate list**,
- **delete list**.



5. My offers

In this section we will find a list of all offers that have been created. Additionally, from this level we can upload **our company logo**, **create a new offer** (detailed instructions on page 39) and from the list we can:

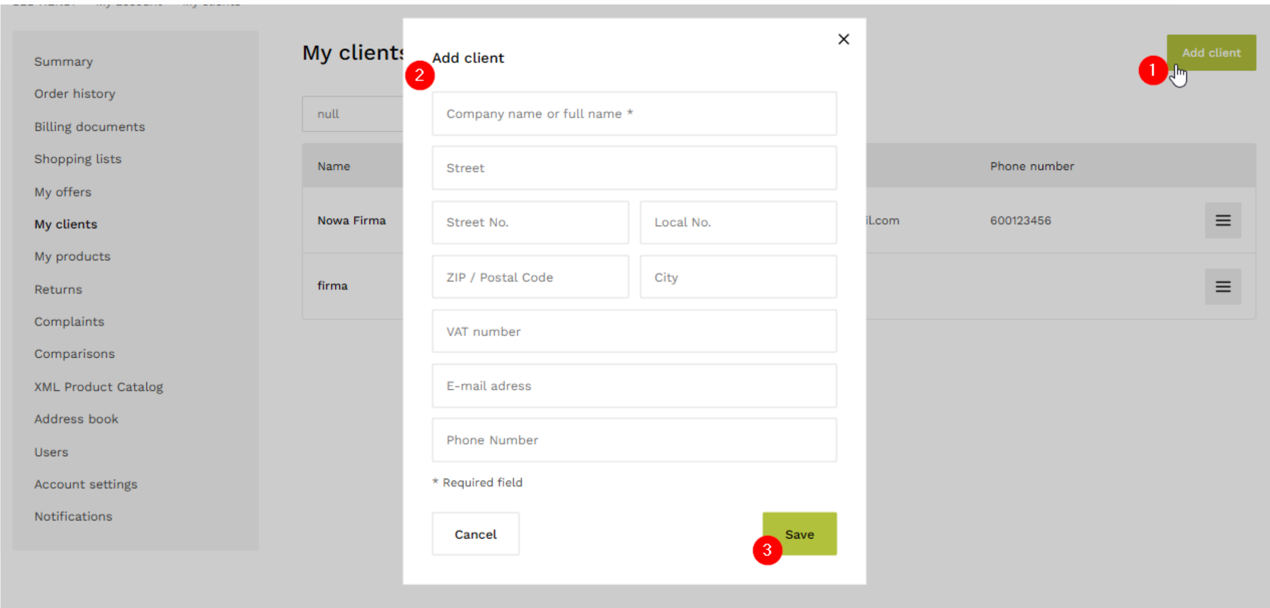
- **Edit an offer**
- **Duplicate an offer**
- **Delete an offer**



6. My clients

In order to prepare a full offer for our client, we need to add him to our client base in advance. This can be done while creating an offer or from the **My clients** section.

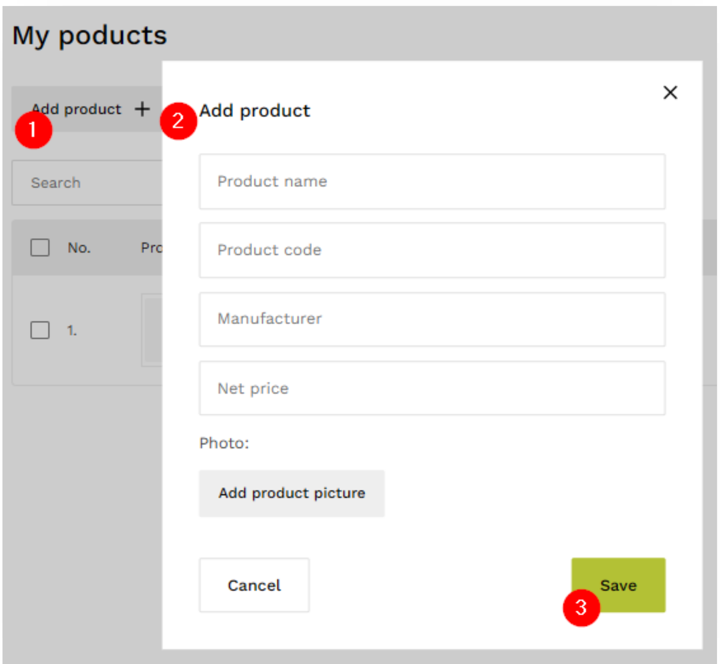
To add a new contractor from My Contractors, click **Add client**, then fill in the address information and click **Save**.



7. My products

When building an offer for our customer, we can use HENDI products as well as our own products that come from our warehouse. We can add such products individually, product by product, or by importing a previously created .XLS/.CSV file.

To add products individually, you need to click **Add Product**, then fill in product data including photo and click **Save.**

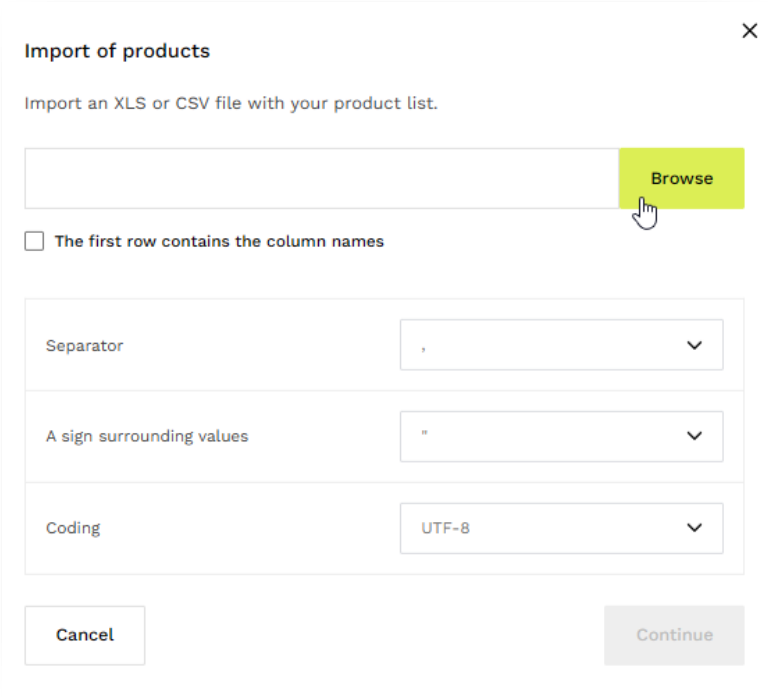


The second of the mentioned options is to import from an .XLS/.CSV file. However, in order for the products to be imported correctly, you first need to create an .XLS/.CSV file, in which you create two columns with:

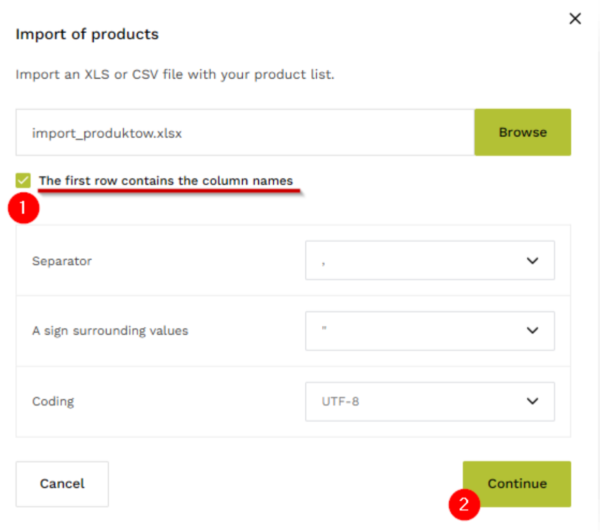
- **Product code**
- **Product name**

	A	B	C	D	E	F
1	code	name				
2	MKF1121S	piec				
3	221761	XYZ				
4	208984	ABC				
5	471005	CBA				
6	507025	CD				
7						

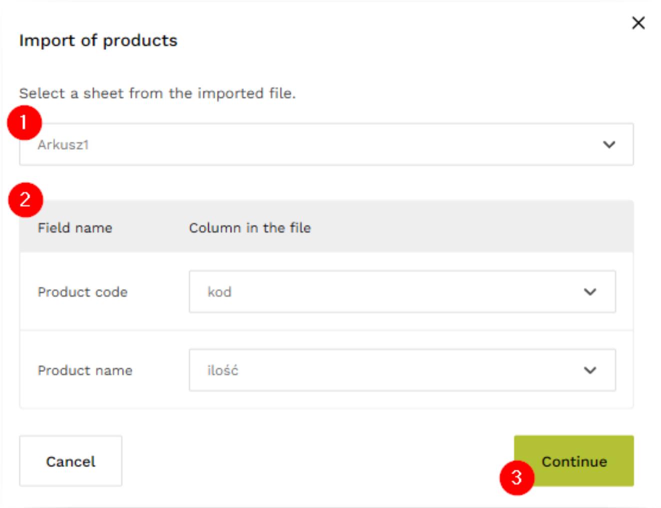
If our file is ready to import then we click **Browse** and select our product file.



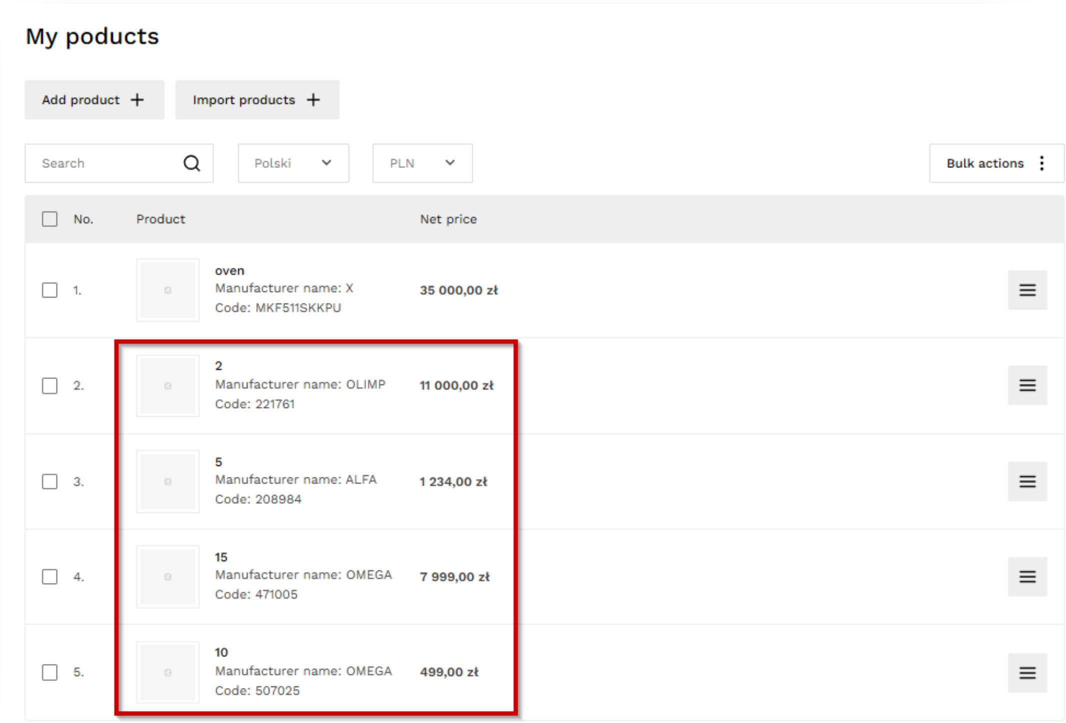
If in our file we have added the aisle of columns in the first row, we check the option **The first row contains the column names** and we click **Continue**.



On the next view, we point to the sheet from our imported file in which the data is located and check if the name of the fields is properly mapped with the columns in our file. If everything agrees then we click **Continue** and wait for the products to be imported.

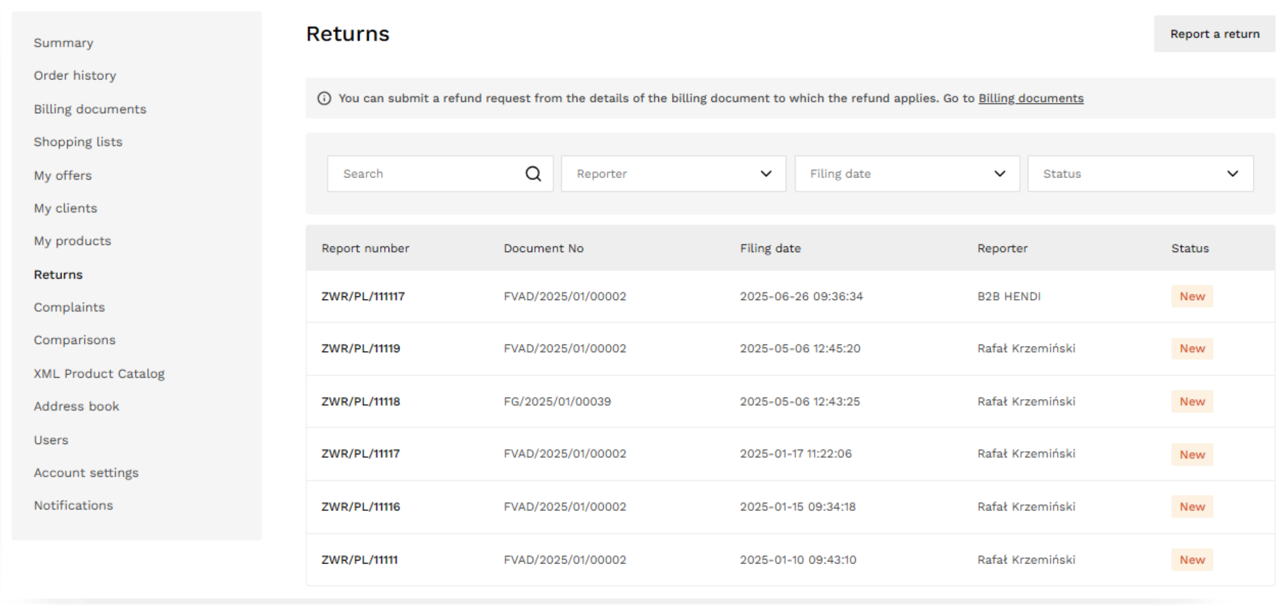


After performing the above steps, the products should be imported correctly and will be visible on the list in the my products section.

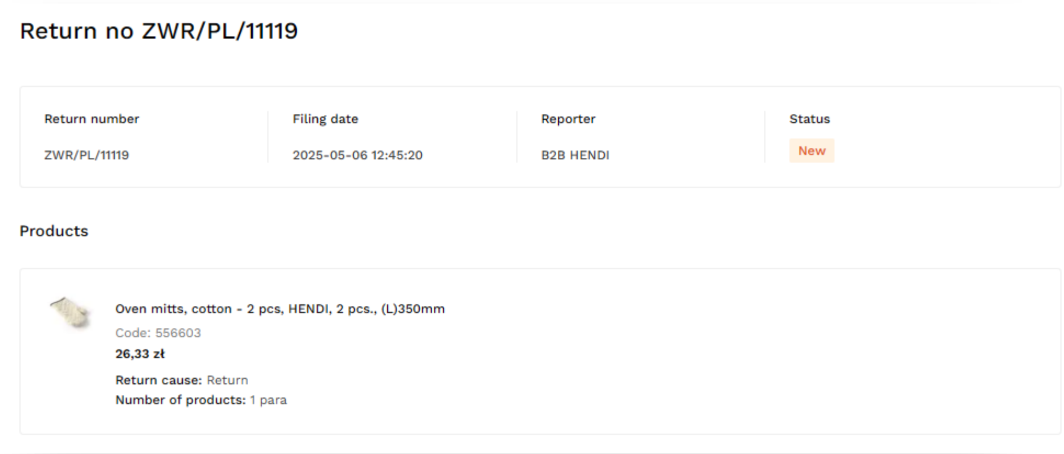


8. Returns

The returns section has a list of requests with returned orders. We can filter the requests by request number, billing document number, requester, request date and status.



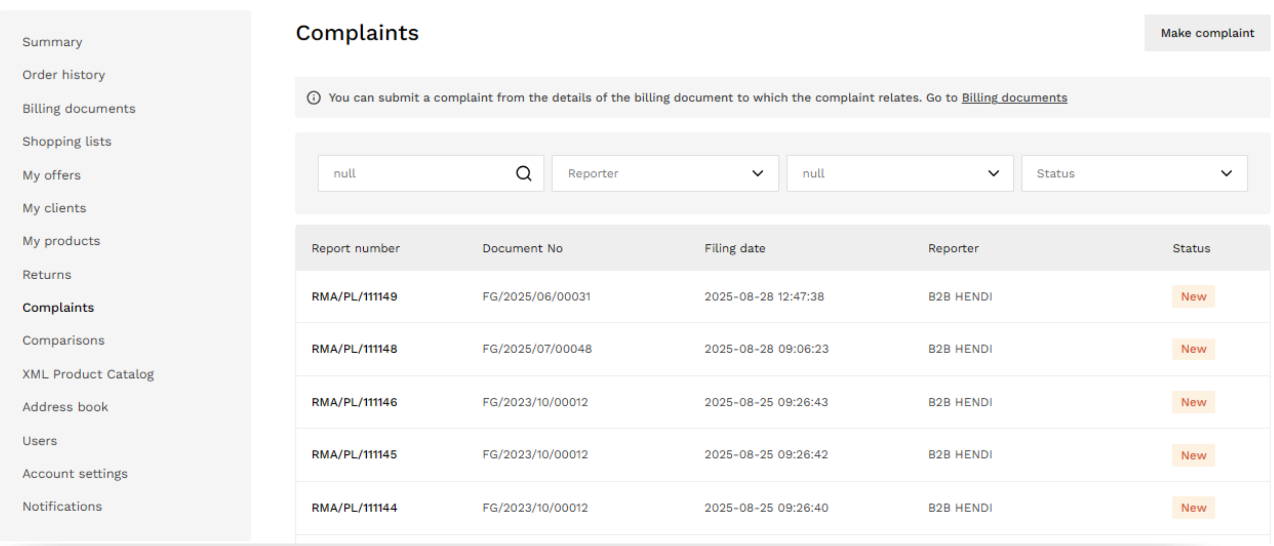
By navigating to a selected ticket, we will find the product/products that have been returned.



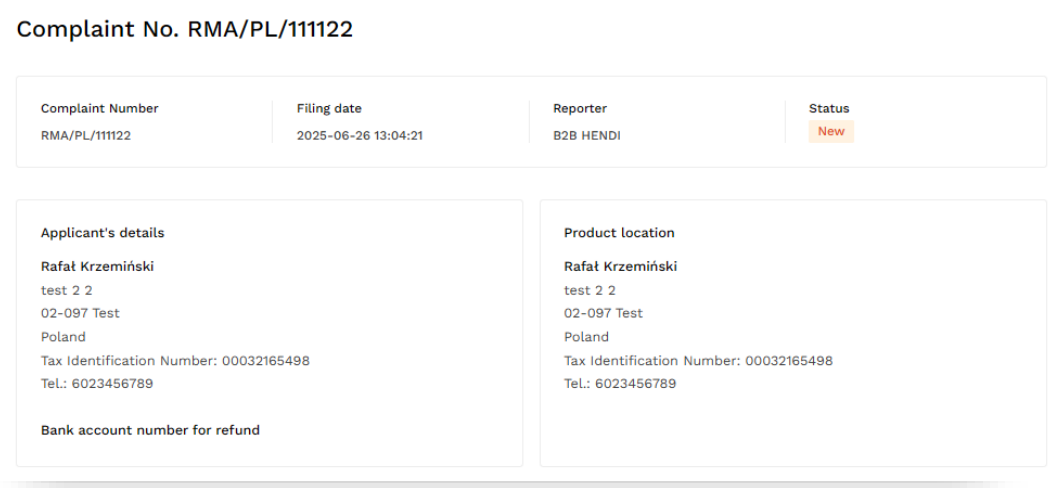
From the list of submissions, we can also report a return. By clicking on the **Submit Return** button, we will be taken to the billing documents and only from there can you proceed with the return request. Full instructions on how to report a return of goods are on page 43.

9. Complaints

The Complaints section has a list of complaint requests. We can filter the claims by claim number, billing document number, submitter, claim date and status.



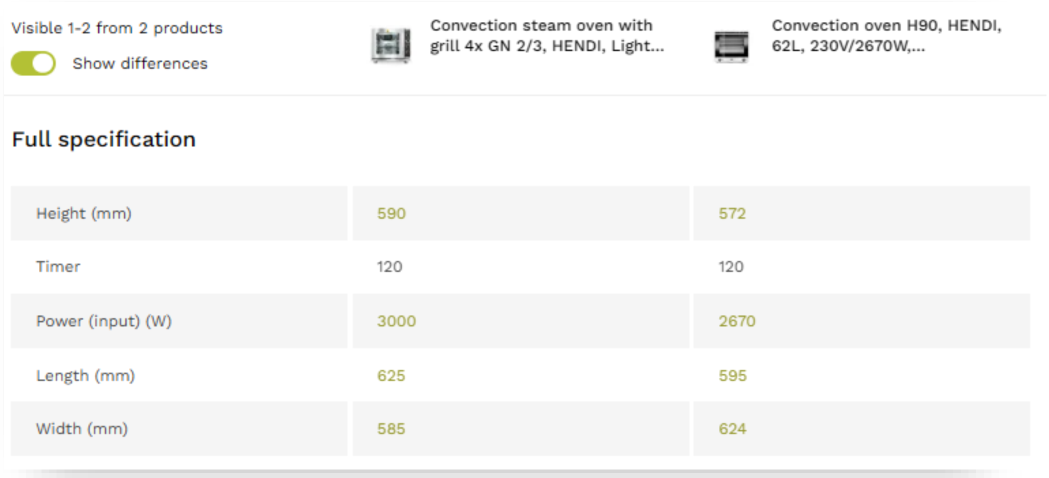
Moving to a selected ticket, we will find the details of the reporting person and the address of the product location.



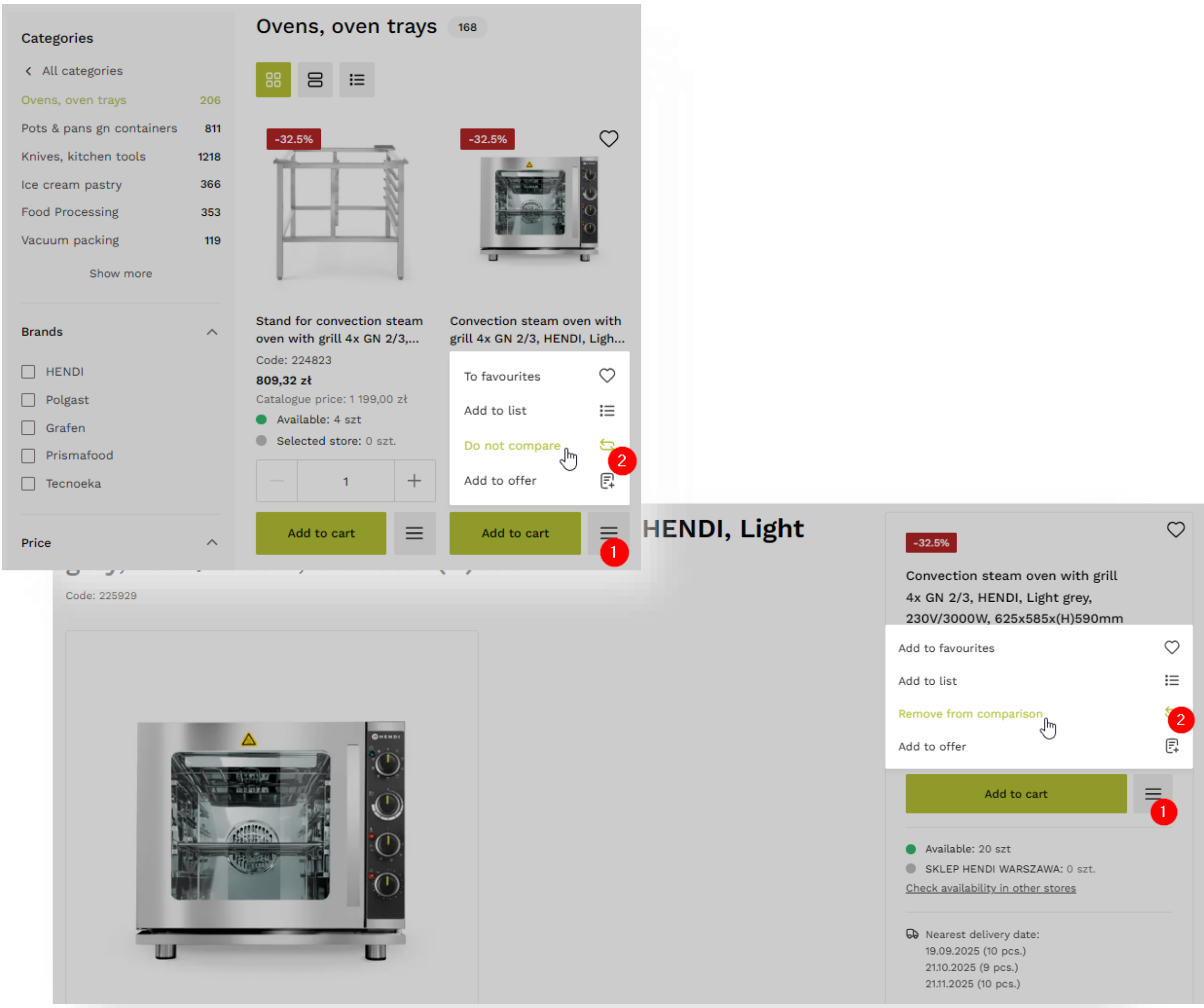
For full instructions on how to report a claim for goods, see page 45.

10. Comparisons

In the comparisons section we can compare products in terms of technical data.



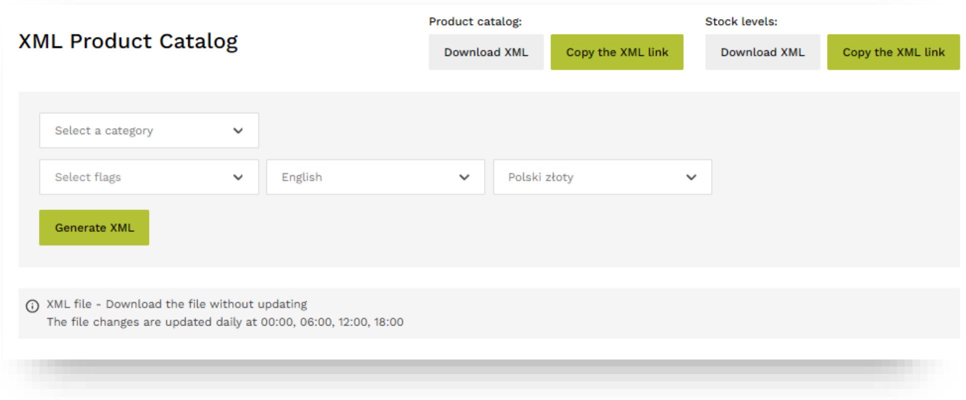
In order to compare the products, we have to add them from the list or product card level, by clicking the button with three horizontal dashes and choosing **Compare/Add to compare.**



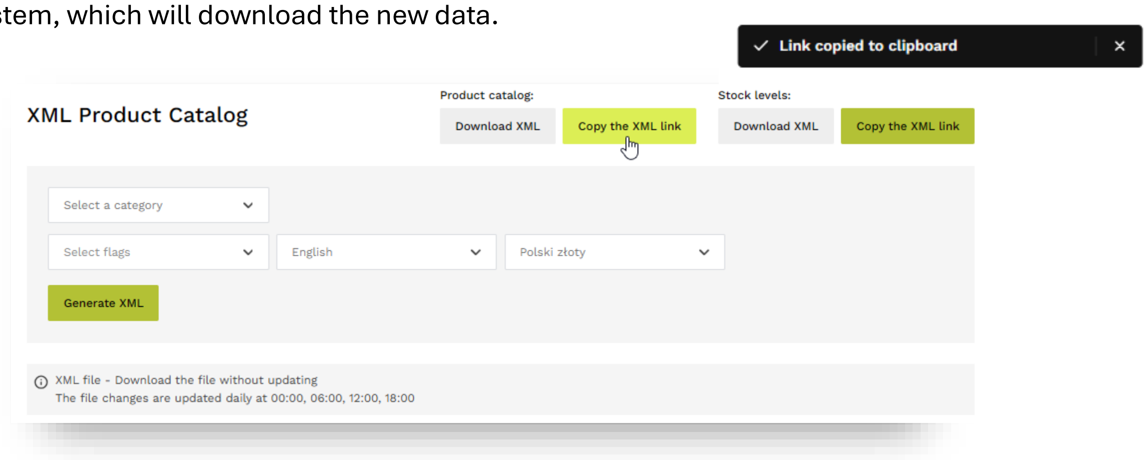
11. XML product catalog

From the level of this section, we can download data with products and their inventory in the form of an XML file. An additional option is to copy a direct link to view the data from a web browser, or to pass the link to your own store system to automatically update the data.

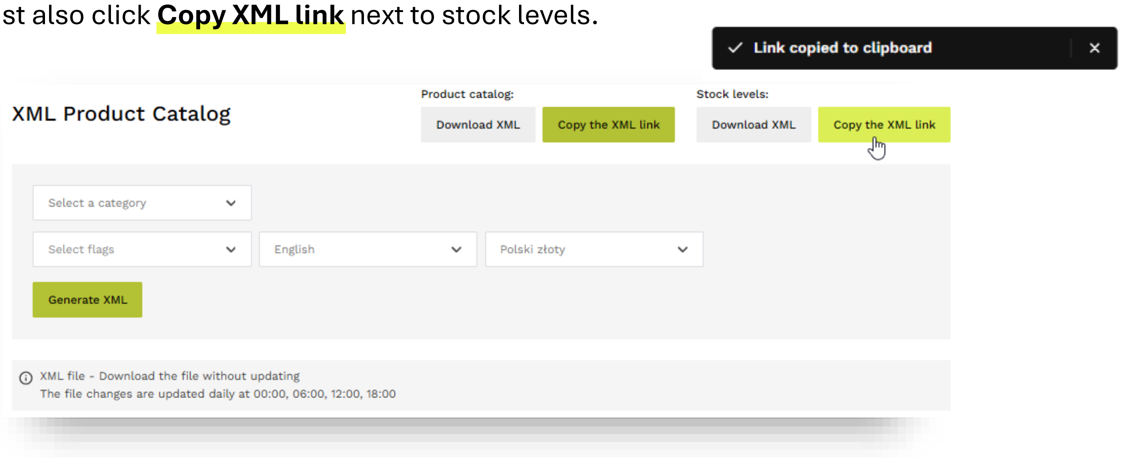
To generate a new XML file, click **Generate XML** and wait until a window appears with the with a choice of where to save the file.



To obtain a link to the XML file with products and stock levels, click **Copy XML link**. You will receive a notification confirming that the link has been copied. You can then paste the link into your browser or into your store system, which will download the new data.



However, if our system is configured to download data from two files - separately for products and stock levels - you must also click **Copy XML link** next to stock levels.

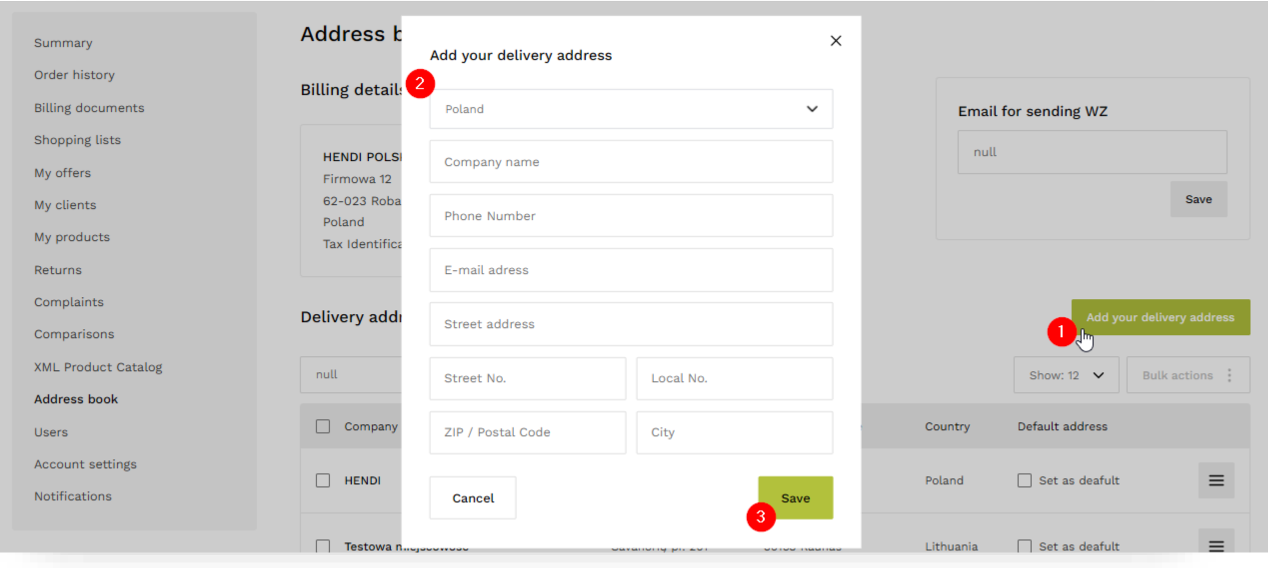


12. Address book

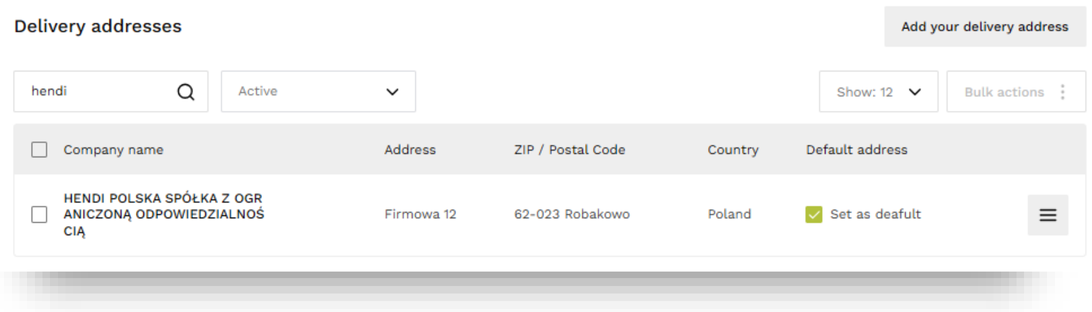
In the address book you will find delivery and pickup addresses. Additionally, from this level we can:

- add new delivery addresses
- set the default delivery address
- set the default email address for sending WZ documents (delivery notes)
- add a new pickup address

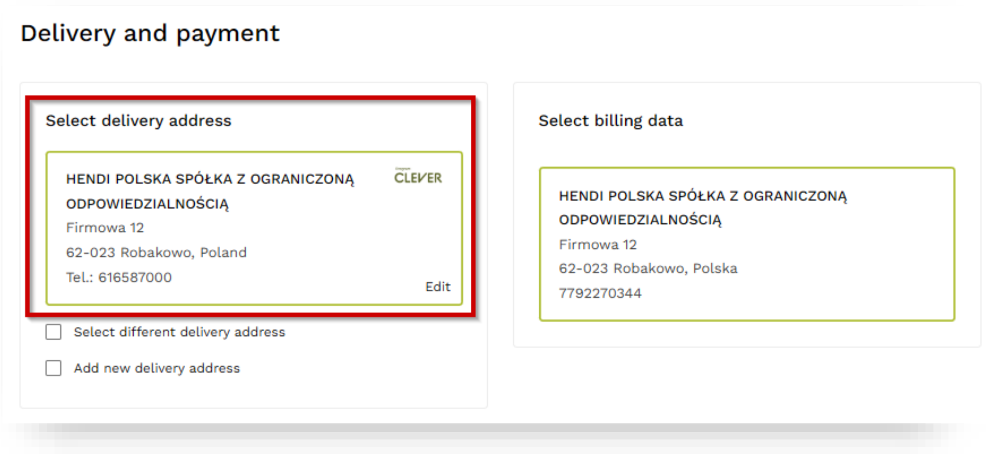
To add a new delivery address, click **Add delivery address**, then fill in the data and click **Save**.



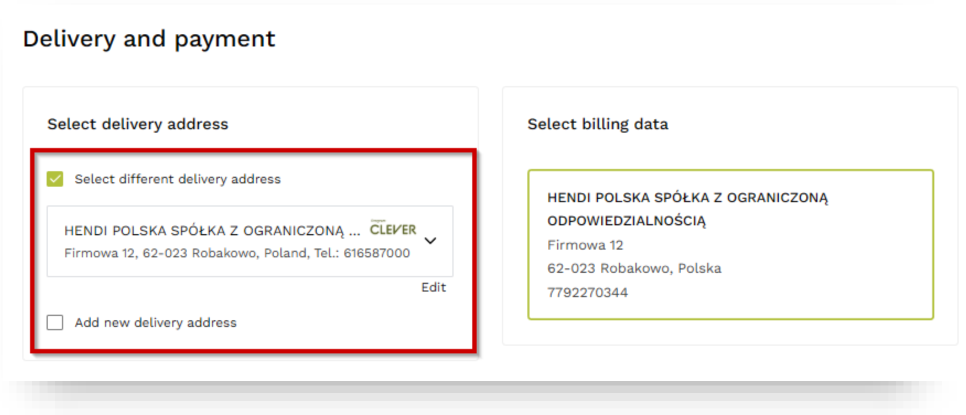
To **set the default delivery address**, select the **Set as default** option next to the appropriate address.



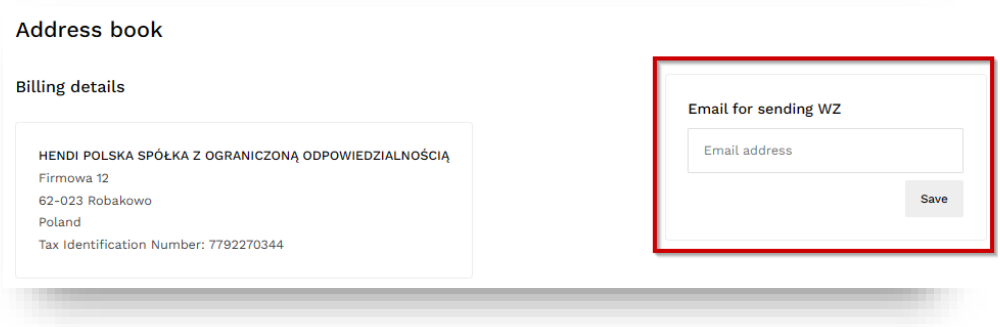
With the option above, when placing an order, we will always see the selected address in the delivery address field.



However, if you want to select/add a delivery address for each order, you must **deselect** the default address option.

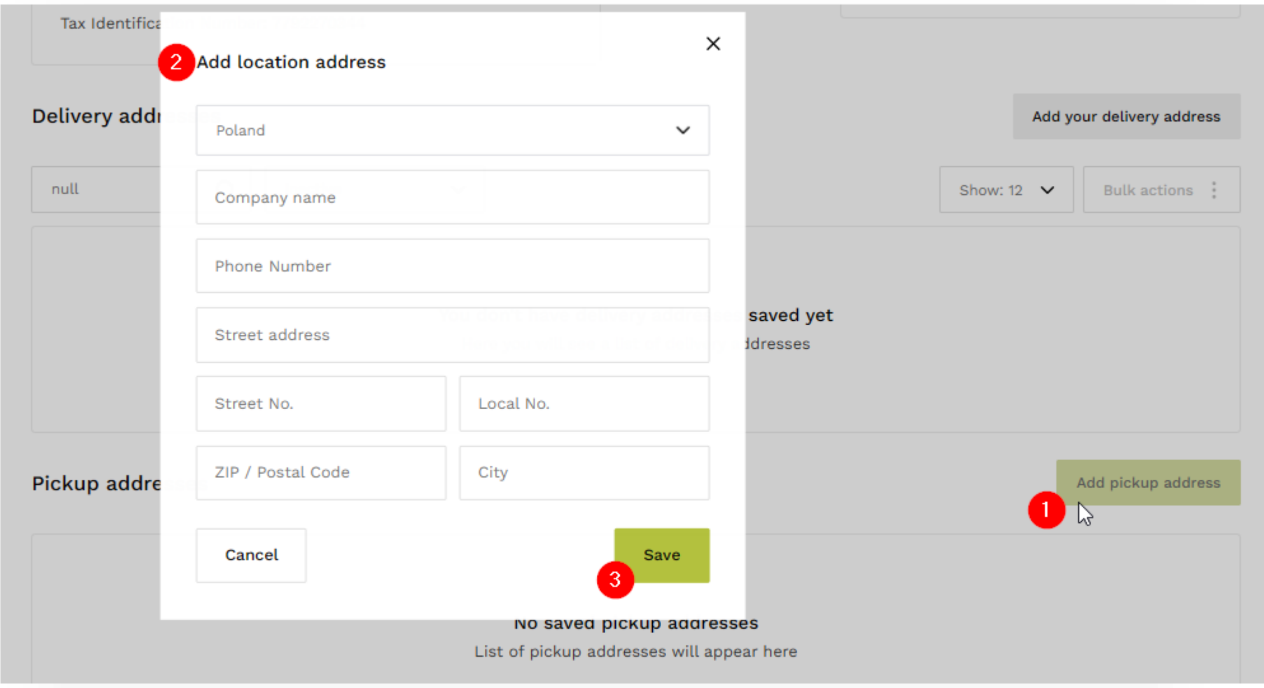


To **set the default email address for sending delivery note documents in PDF**, enter the email address in **the Email for sending WZ field**.



This means that when placing an order, the email address for sending the WZ document will be automatically filled in.

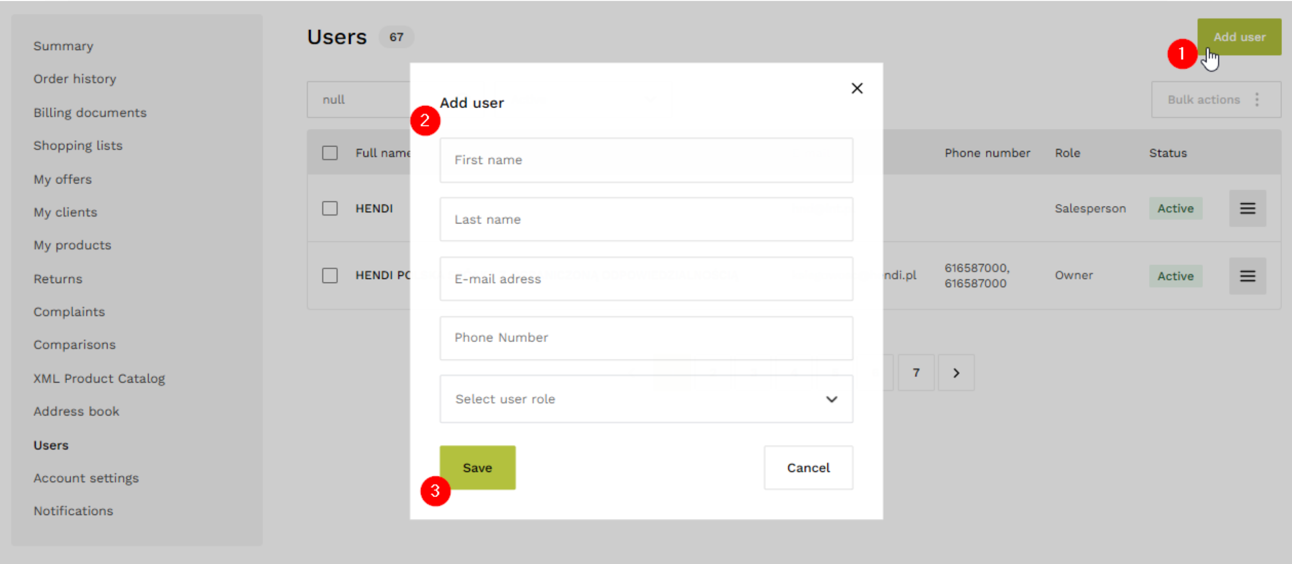
To **add a new goods pickup address**, go to the bottom of the page and click **Add pickup address**. Then complete the address details and click **Save**.



13. Users

From this section, we can add new users and edit already created accounts.

To add a new user, click **Add user**, then enter the user's data and assign the appropriate role.



Available user roles:

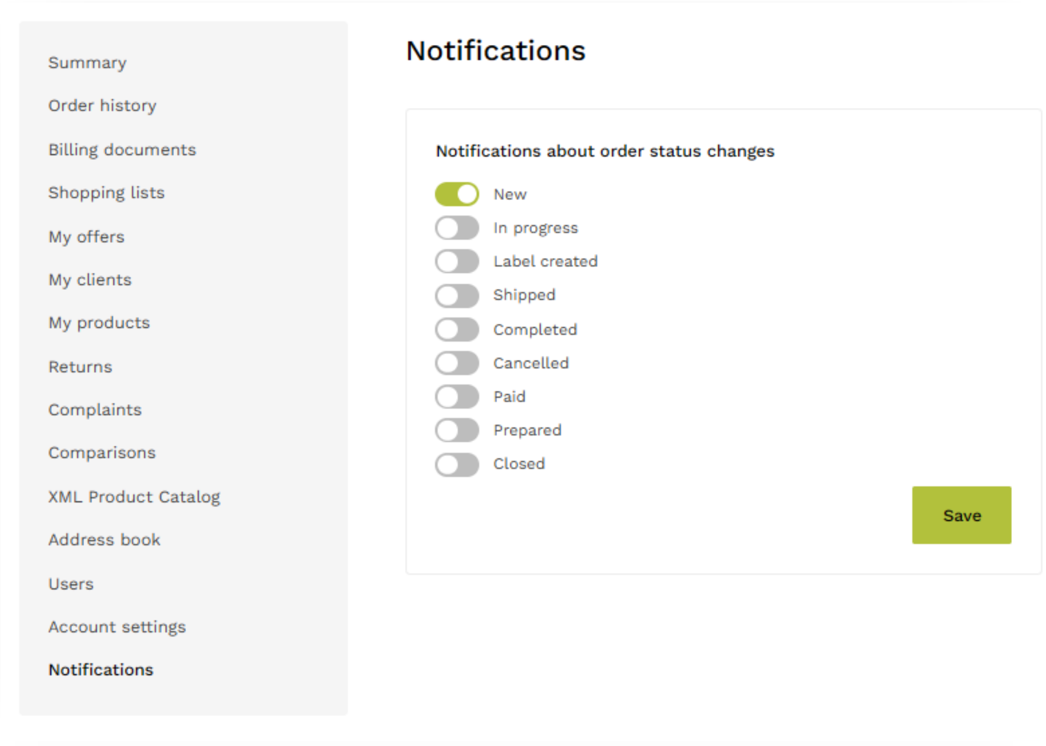
- **Owner** / **Manager** - full access
- **Viewer** - access to the list of products and purchase lists
- **Accountant** - available only to billing documents
- **Salesperson** - access to the list of products and their availability and prices, only has access to his orders, no access to billing documents
- **Offer** - access to the list of products, without prices and commercial and billing documents

14. Account settings

In this section we have information about our account. It is possible to change the data and password for the account.

15. Notifications

In the notifications section, we have the option to enable/disable receiving an email notification when a status change is made for orders and return and claim requests. Simply flip the switch next to the notification in question to enable/disable it.

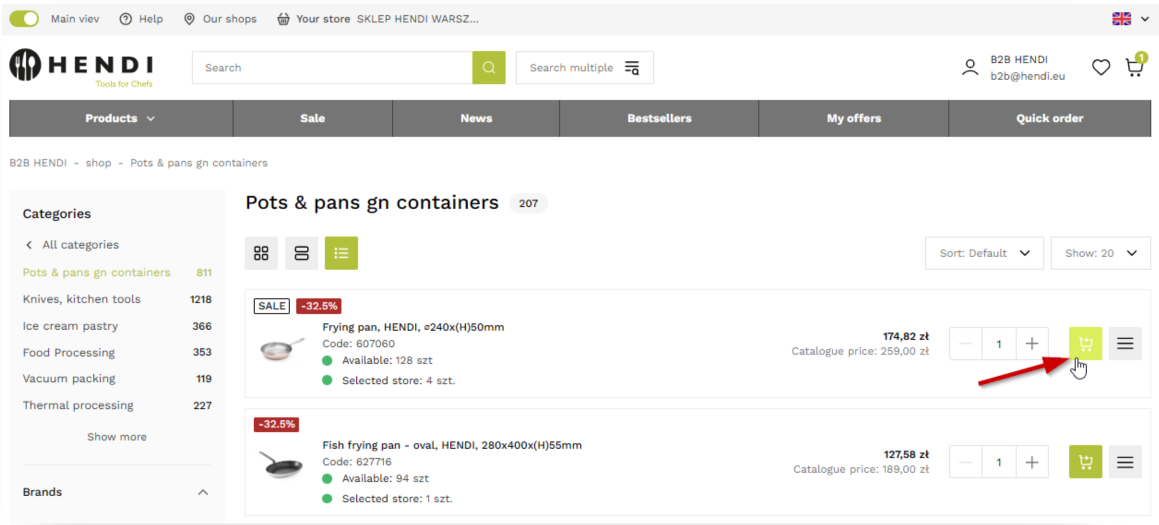


Creating orders

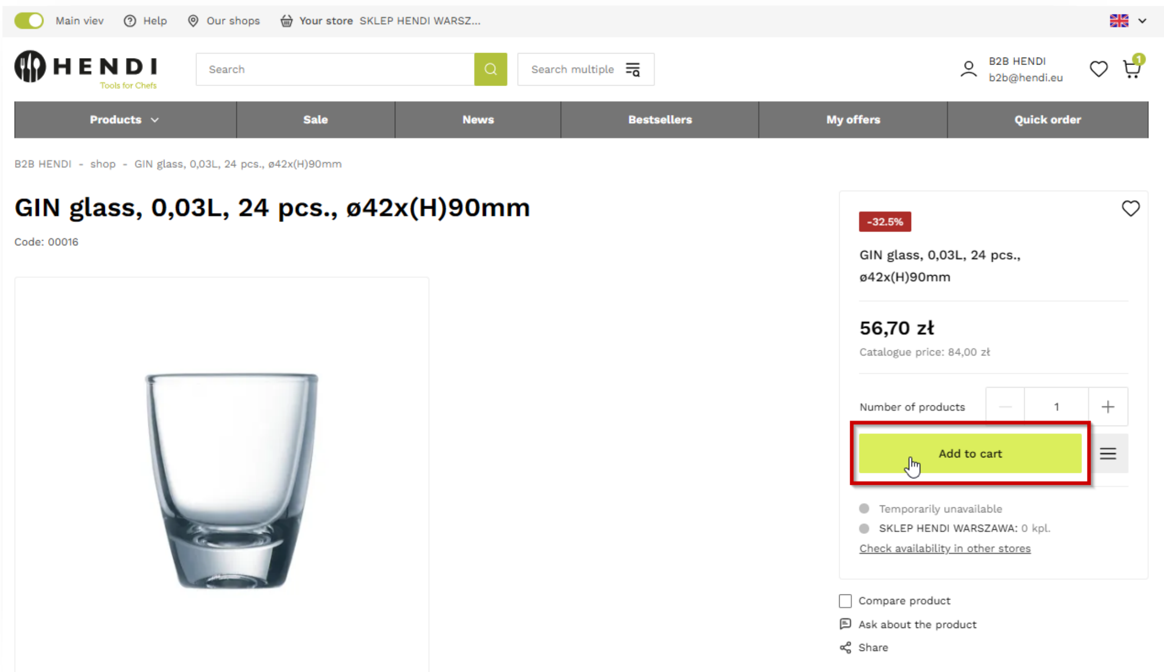
1. Adding products to the cart

Adding products to the shopping cart is possible from:

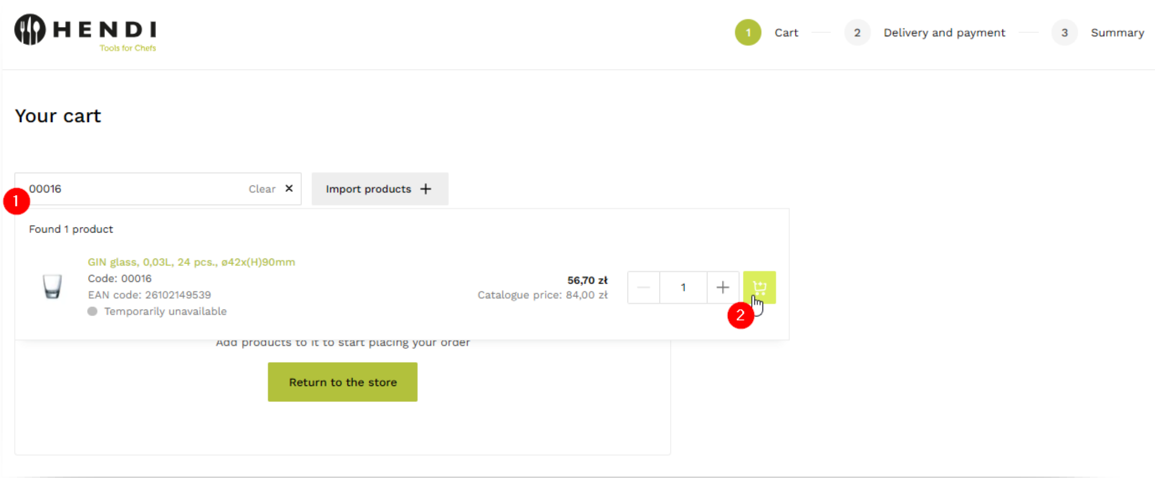
A. product listing



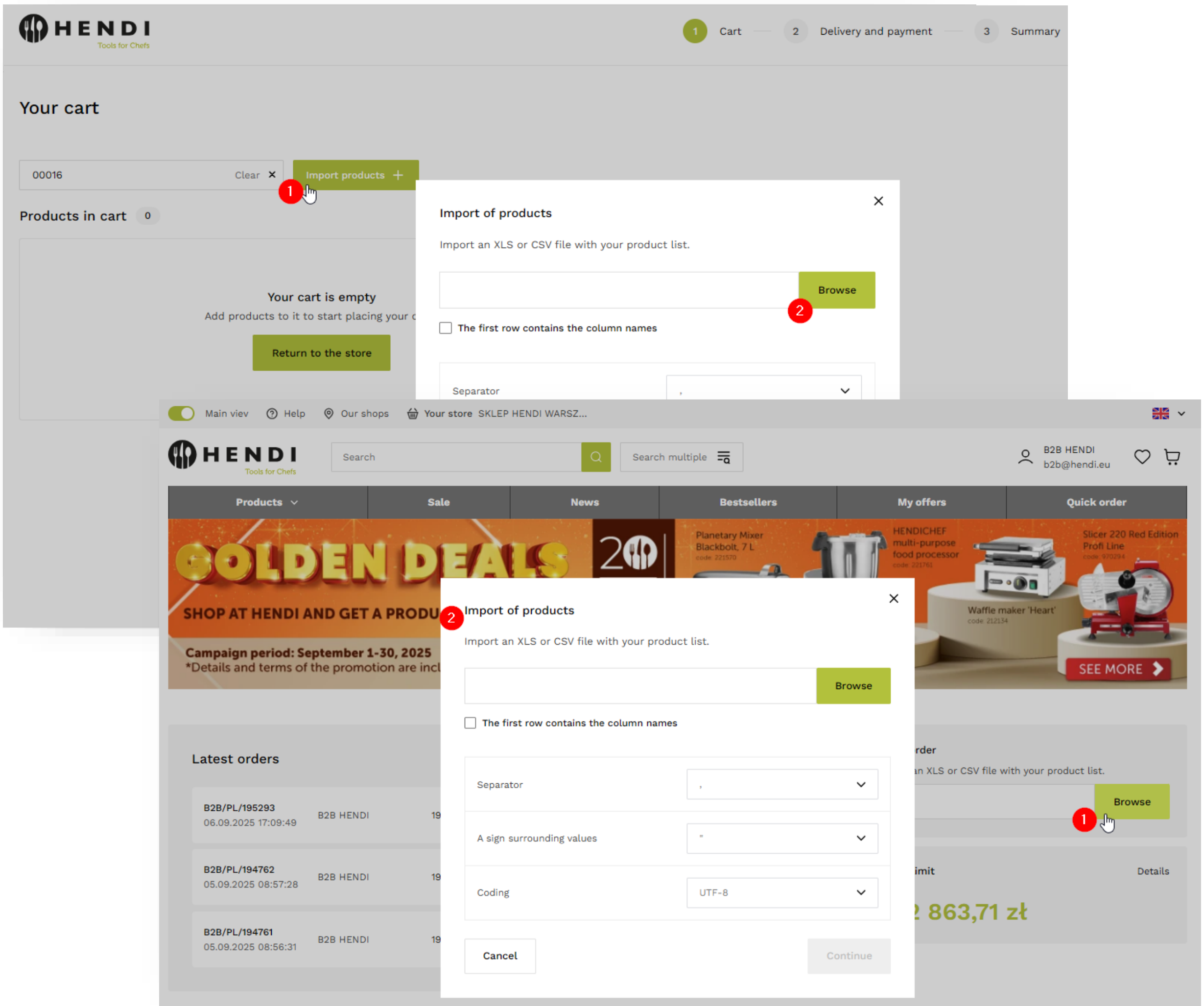
B. product card



C. cart



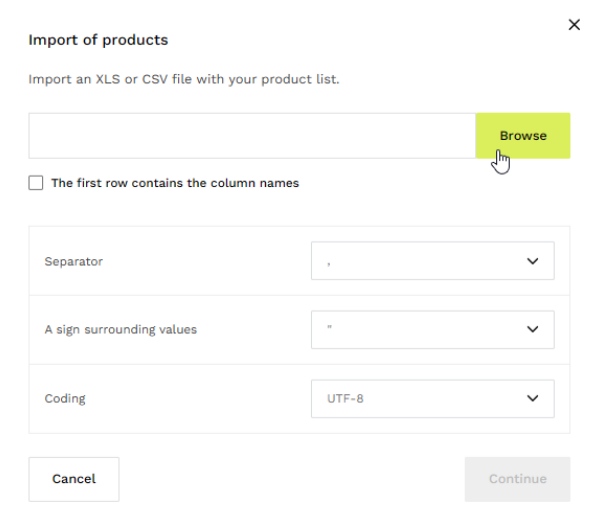
D. An additional option is to import a ready-made .xls/.csv file from either the shopping cart or homepage level



In order for the products to be correctly imported into the shopping cart, you first need to create an .xls/.csv file, in which you create two columns with the product code and the quantity you want to add to the cart. For example, we can call the columns "code" and "quantity".

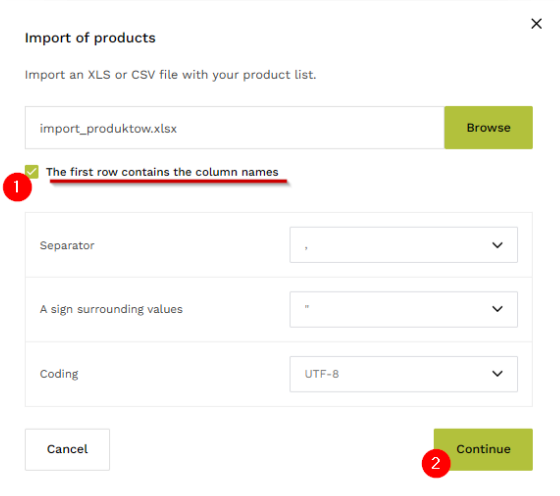
	A	B
1	kod	ilość
2	MKF511SKKPU	2
3	221761	2
4	208984	5
5	471005	15
6	507025	10

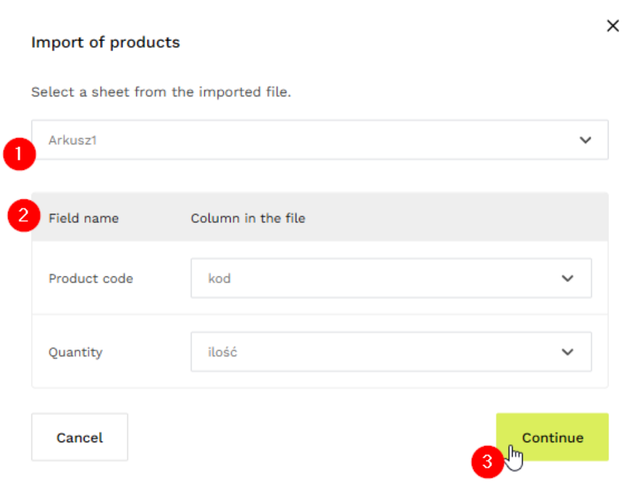
From the shopping cart or home page, we click **Browse** and select our previously saved file.



If in our file we have added a column aisle in the first row, we check the option **The first row contains the column names** and we click **Continue**.

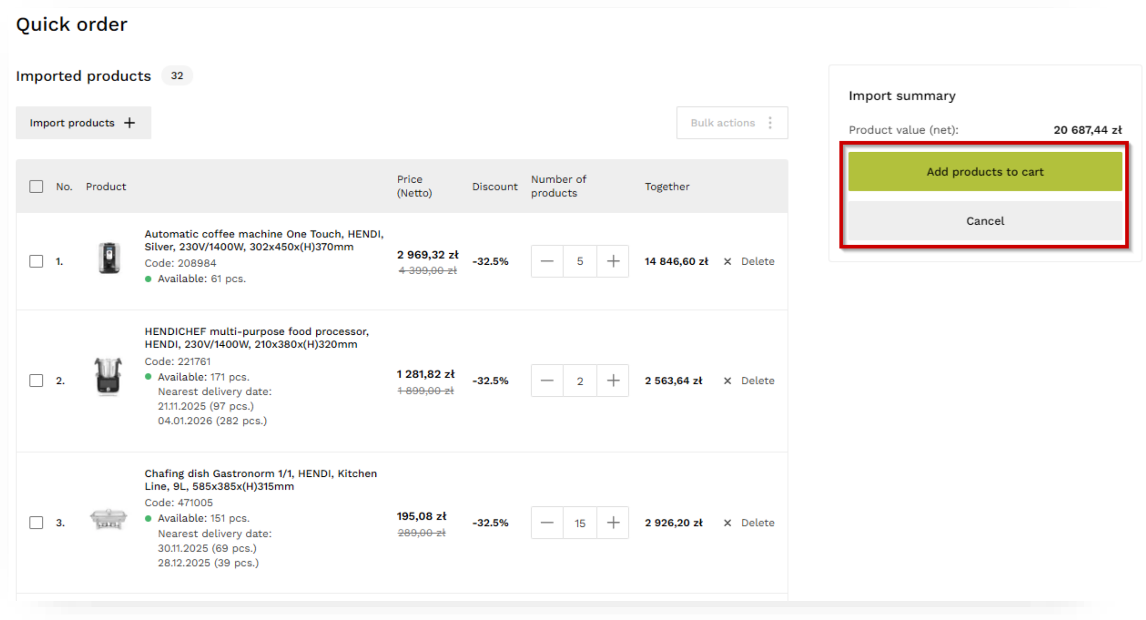
On the next view, we point to the sheet from our imported file in which the data is located and check if the field names are properly mapped with the columns in our file. If everything agrees then we click **Continue** and wait for the products to be imported.





Before importing the products into the shopping cart, we will receive a page from the importer where we will see a list with our products.

From the received list we can remove selected products or change their quantity. Addition, we can **cancel** the entire list or, if everything is correct, **Add products to the cart**.



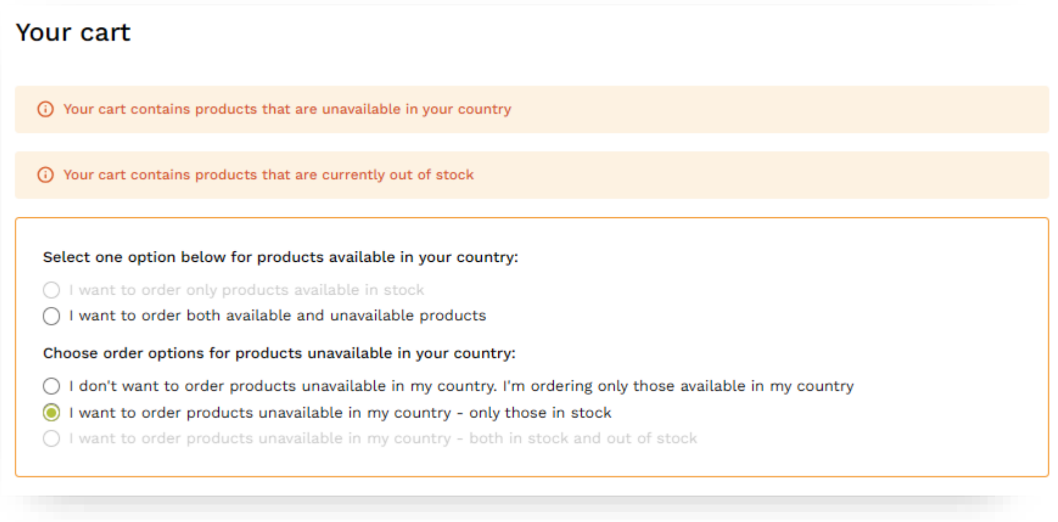
After clicking **Add products to cart**, we will be taken to the cart with the products we selected.

2. Division of orders into available, out of stock, and unavailable products in a given country

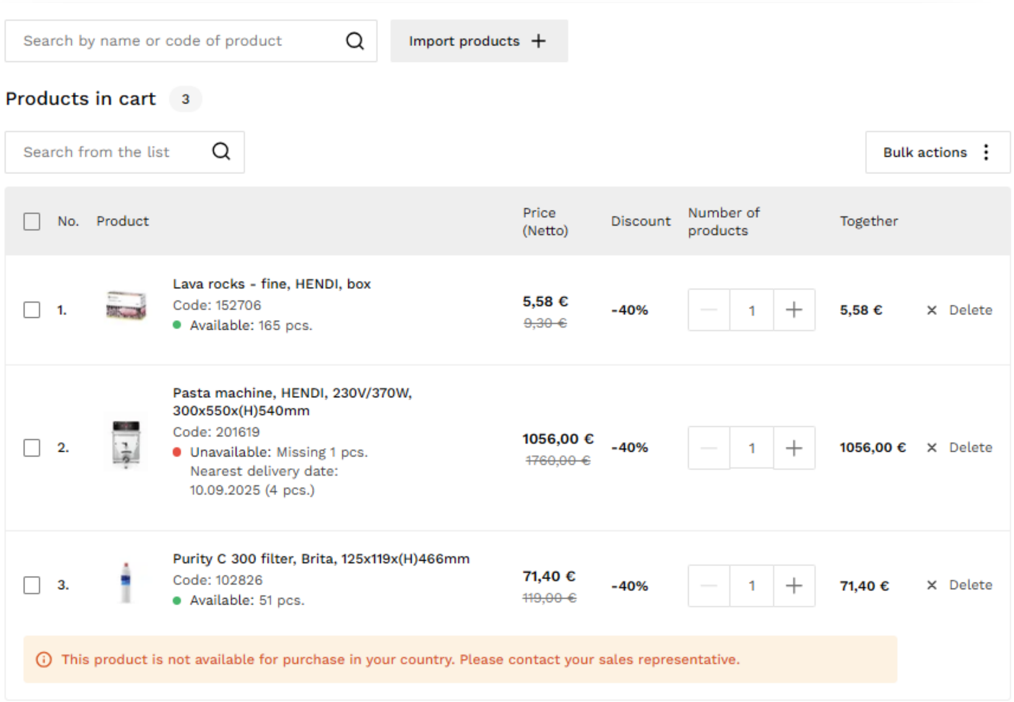
The order can be divided into up to 3 parts due to the products:

- **Available** - products available in our stock
- **Missing** - products that we currently do not have in stock (**/BR**)

The relevant information will appear in the shopping cart:



Addition, the products can be seen in one table



and in separate sections "XY"

Products available in stock 1

Order processed immediately

Summary	Quantity of products	
Order value (net): 5,58 €	1 pcs.	Hide products

No.		Product	Price (Netto)	Discount	Number of products	Together
1.		Lava rocks - fine, HENDI, box EAN code: 152706 Available: 165 pcs.	**5,58 €** ~~9,30 €~~	**-40%**	1	**5,58 €**

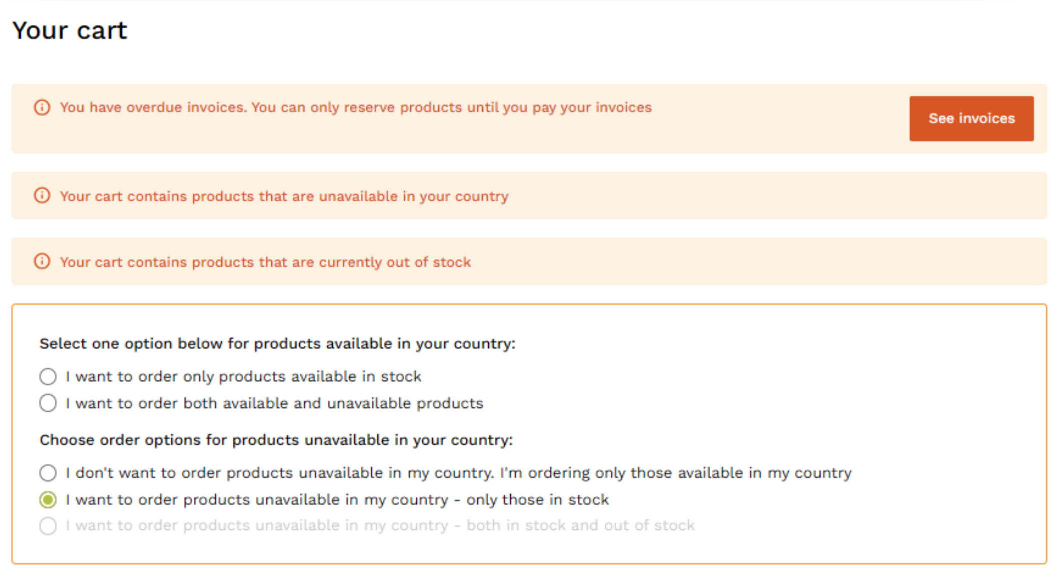
Products out of stock 1

BR Order - order placement with later fulfillment date

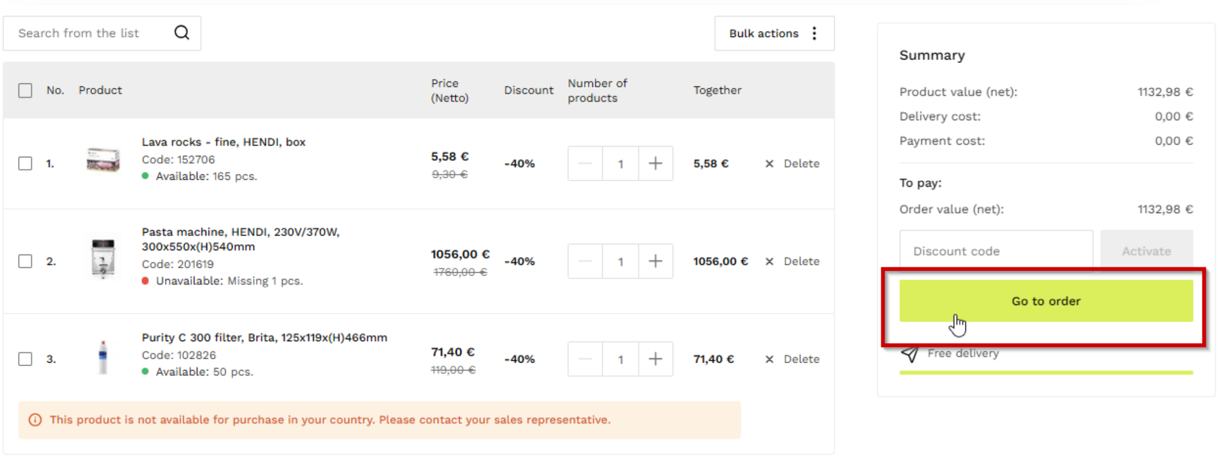
Summary	Quantity of products	
Order value (net): 1056,00 €	1 pcs.	Hide products

No.		Product	Price (Netto)	Discount	Number of products	Together
1.		Pasta machine, HENDI, 230V/370W, 300x550x(H)540mm EAN code: 201619 Unavailable: Missing 1 pcs.	**1056,00 €** ~~1760,00 €~~	**-40%**	1	**1056,00 €**

Before proceeding to the rest of the order, we need to choose what we want to do with our products



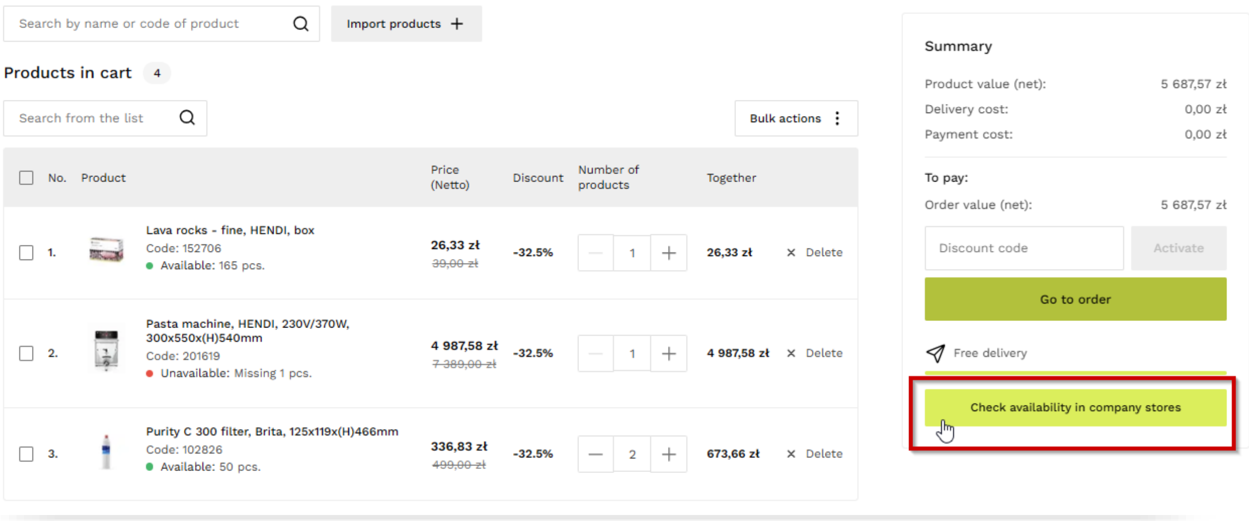
Then we click **Go to order**



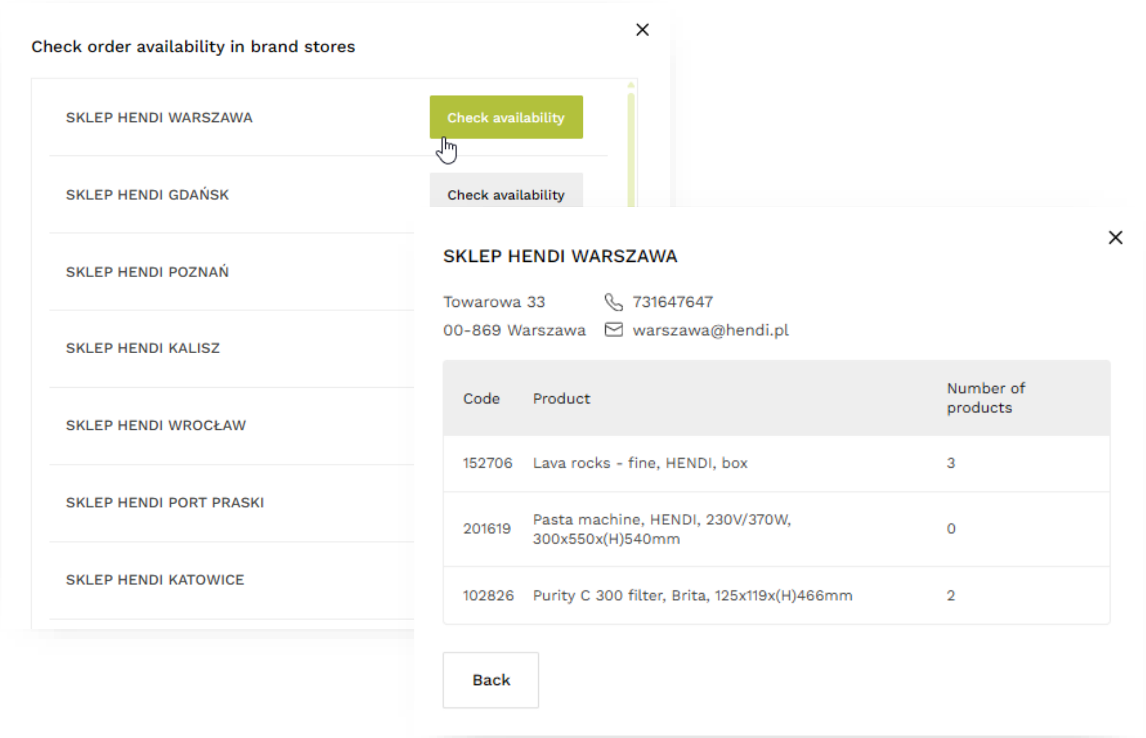
3. Checking the availability of goods in HENDI company stores

One of the options for checking the availability of goods in HENDI company stores is the ability to check the availability of goods from the level of the shopping cart, but with this option, we do not check only one product but all the products that we currently have in the cart.

To do this, while already in the shopping cart, click the **Check availability in company stores** button



Then, we select the store where we want to check the availability of our products



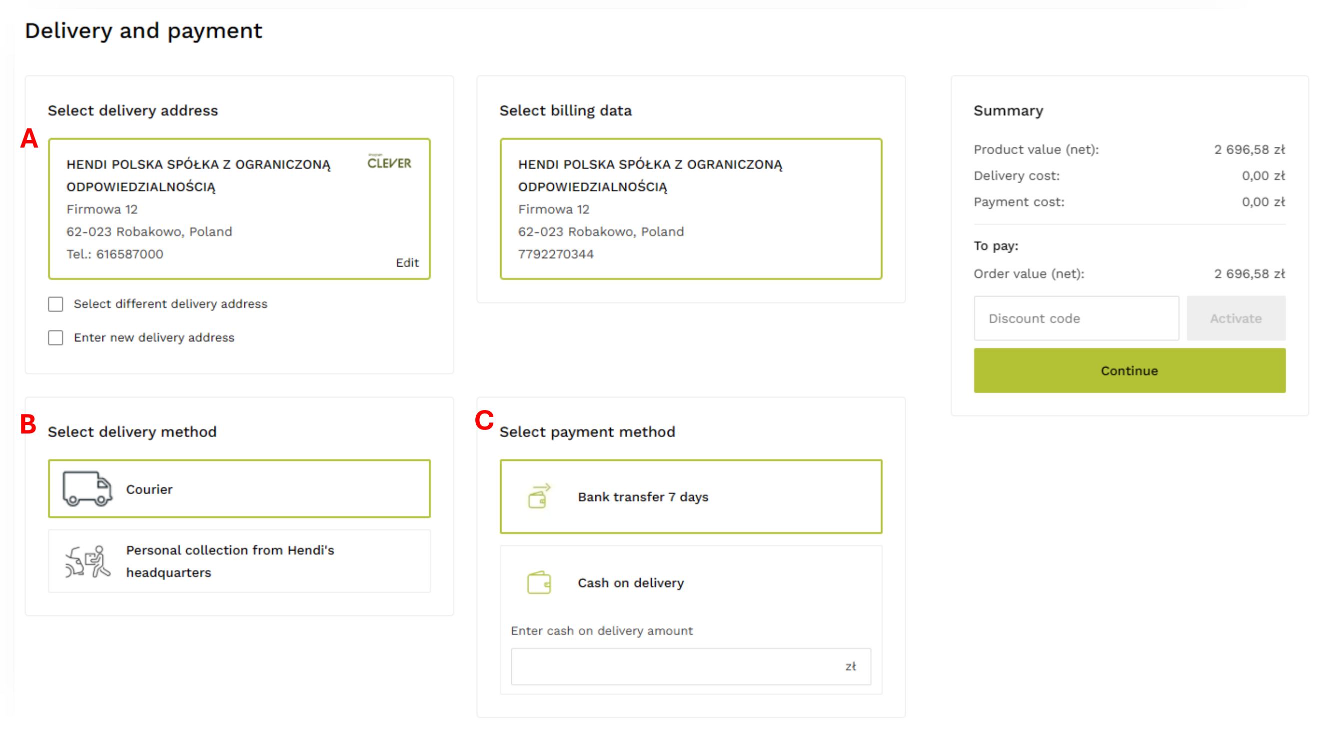
4. Delivery and payment method

After adding the products, we move to the next step, where we choose:

A. delivery address

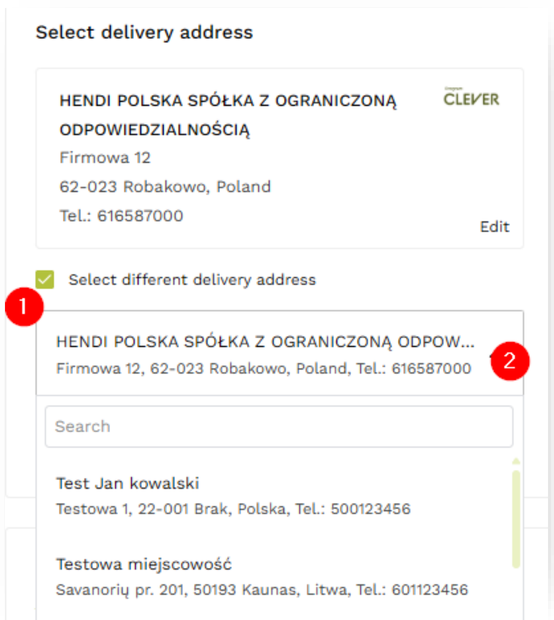
B. delivery method

C. payment method

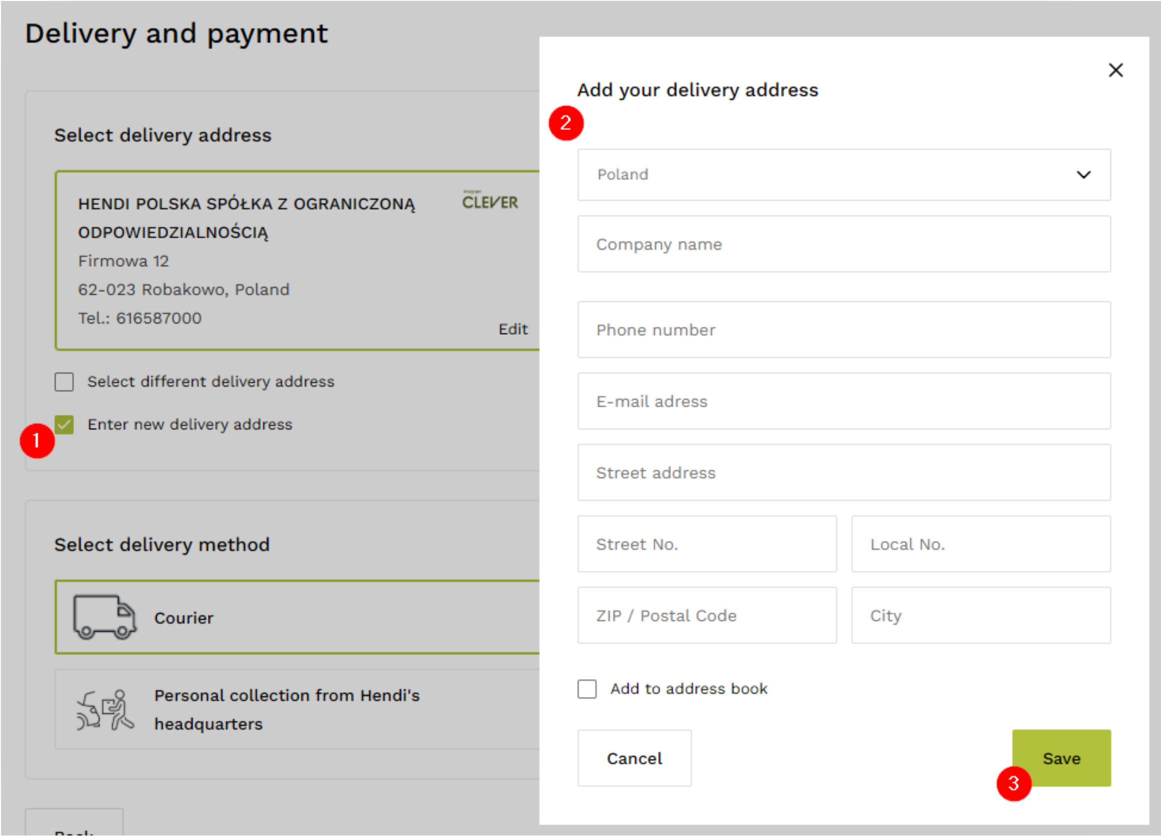


If a default delivery address has been set in the address book, we can change it by clicking **Select different delivery address** and then select an address from the list or use the search engine.

Search for an address by typing in the search field: company name/name/name/street/city/postal code



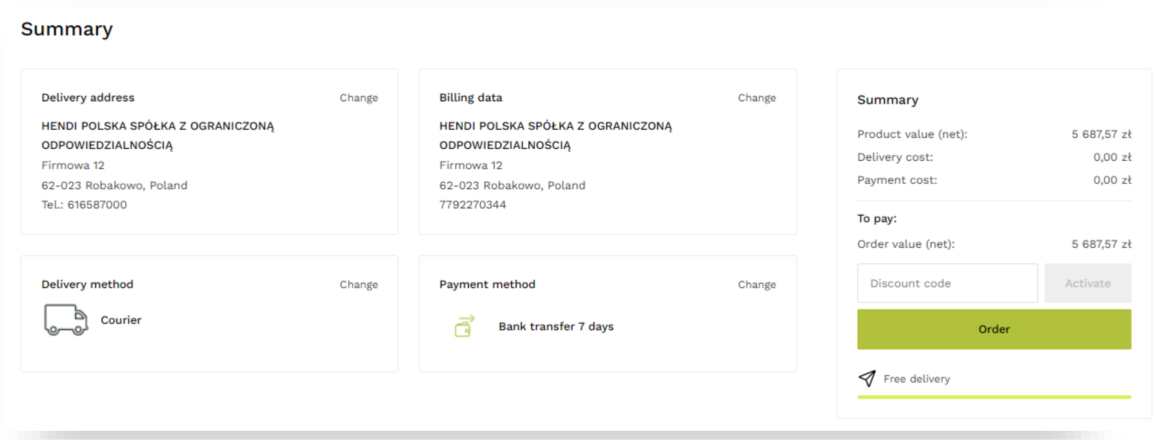
To add a new delivery address, click **Enter new delivery address**, fill in the address data and save. After saving the data, the shipping address will be substituted.



If you want the new delivery address to be saved in your address book, you must also select the **Add to address book** option.

5. Summary

Going to the summary, we can see the delivery address, shipping method and payment method we selected earlier.



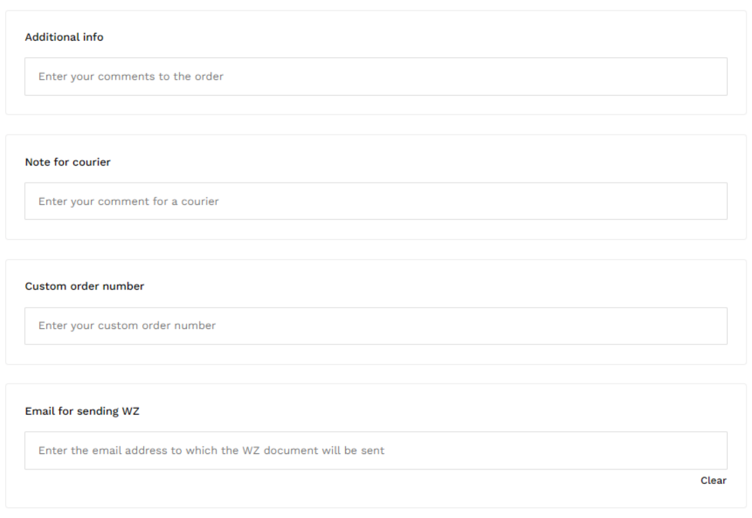
Addition, we can specify:

Additional information - a place to enter information for the store staff

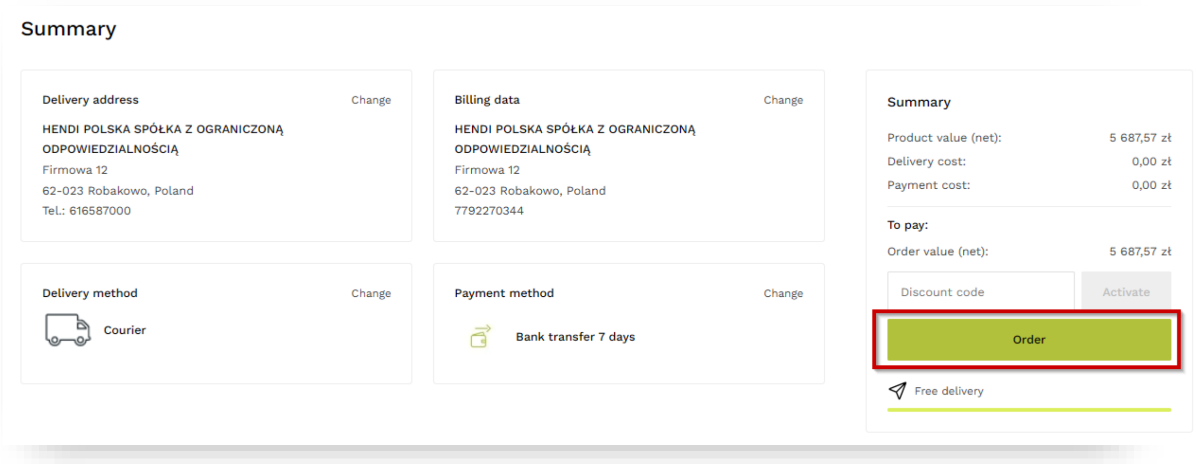
Information for the courier - a place to enter information for the courier

Custom order number - fill in when you want your order to be signed with some unique number

Email for WZ shipment - enter the email address to which the WZ document will be sent

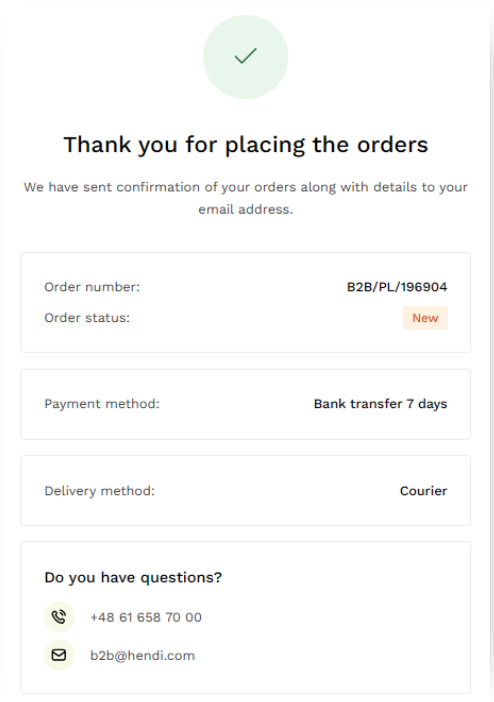


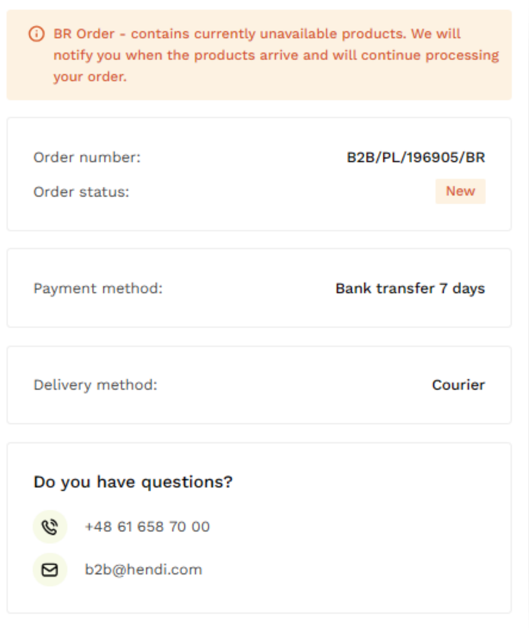
If all the entered data are correct and we have entered additional information, we click **Order**, which finishes the ordering process.



6. Order confirmation

As an order confirmation you will see an appropriate message with the order number included. If, at the same time, we ordered a product which is not in stock (NONE) or which we cannot buy in the given country, we will also receive a notification here.

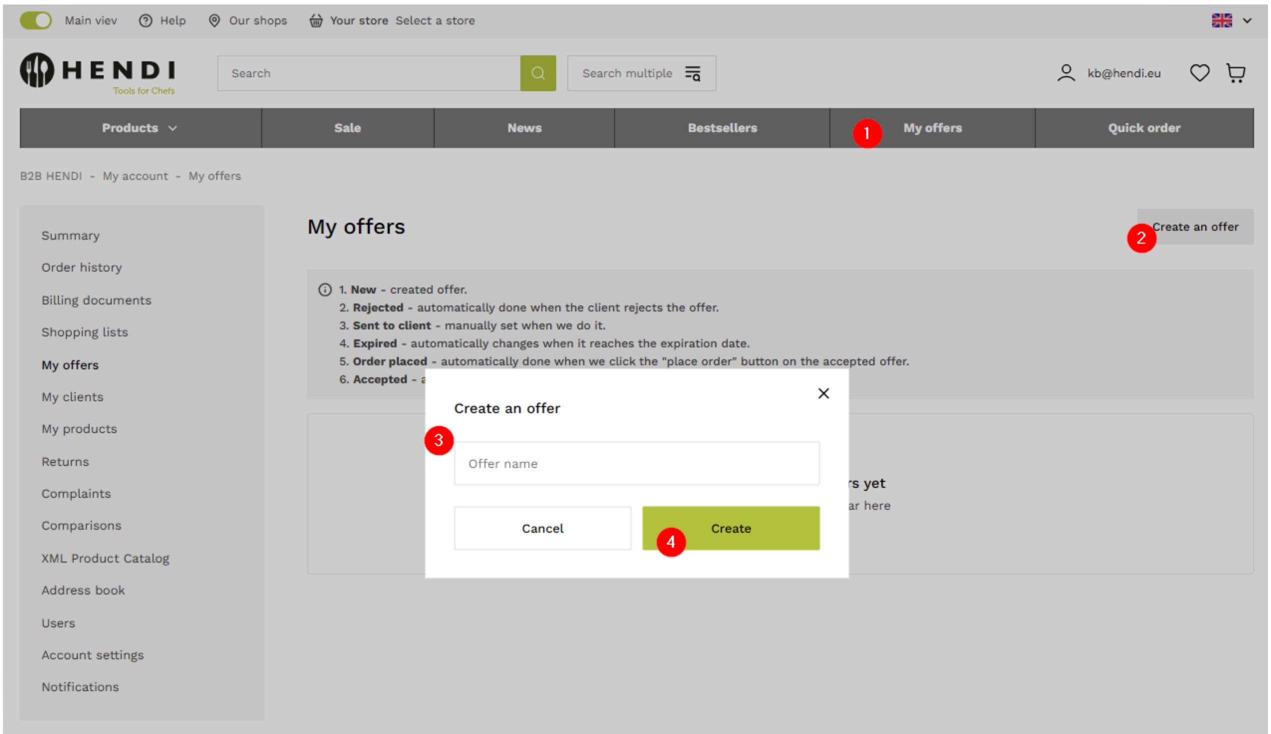




Addition, an order confirmation will be sent to the email address assigned to your account. The same confirmation is received by the HENDI account manager.

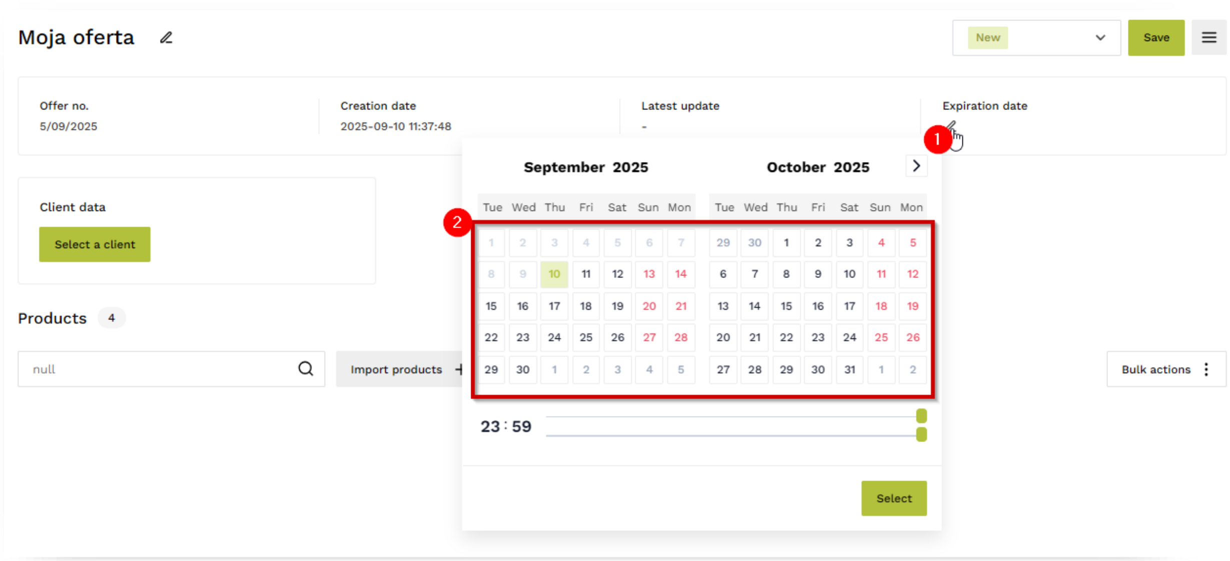
Creating offers

To create a new offer for our customer, click **My Offers** from the main menu and then **Create Offer**. Then enter **the Name of the offer** and click **Create.**

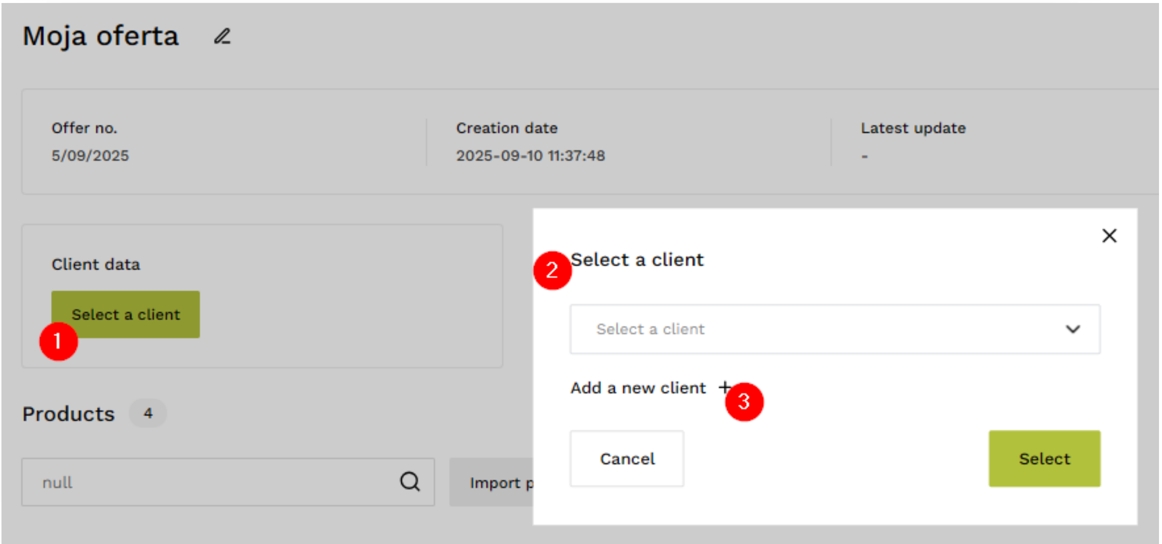


We will get a new page where we fill in the data needed to prepare the offer.

We can limit our offer by time or leave it until cancellation. To set the expiration date for our offer, click **Expiration** date and then select a date.

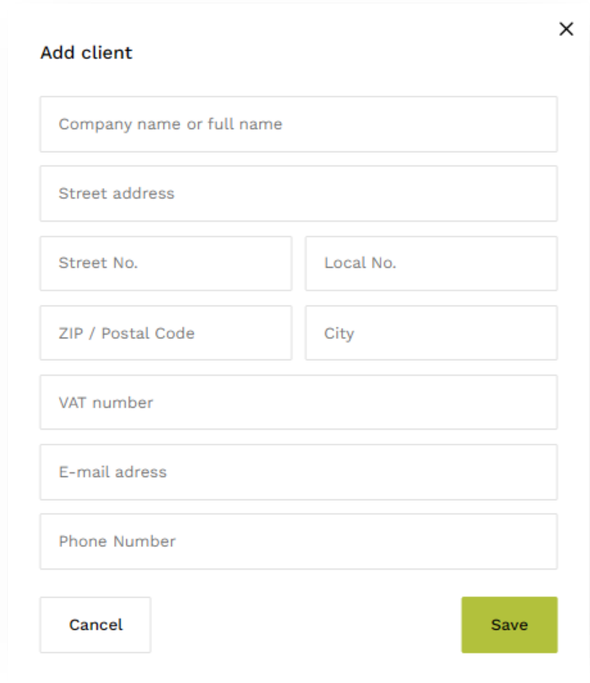


Next, **we select the contractor** for whom we are preparing the offer. Choose a contractor from the list of previously added contractors or create a new one.

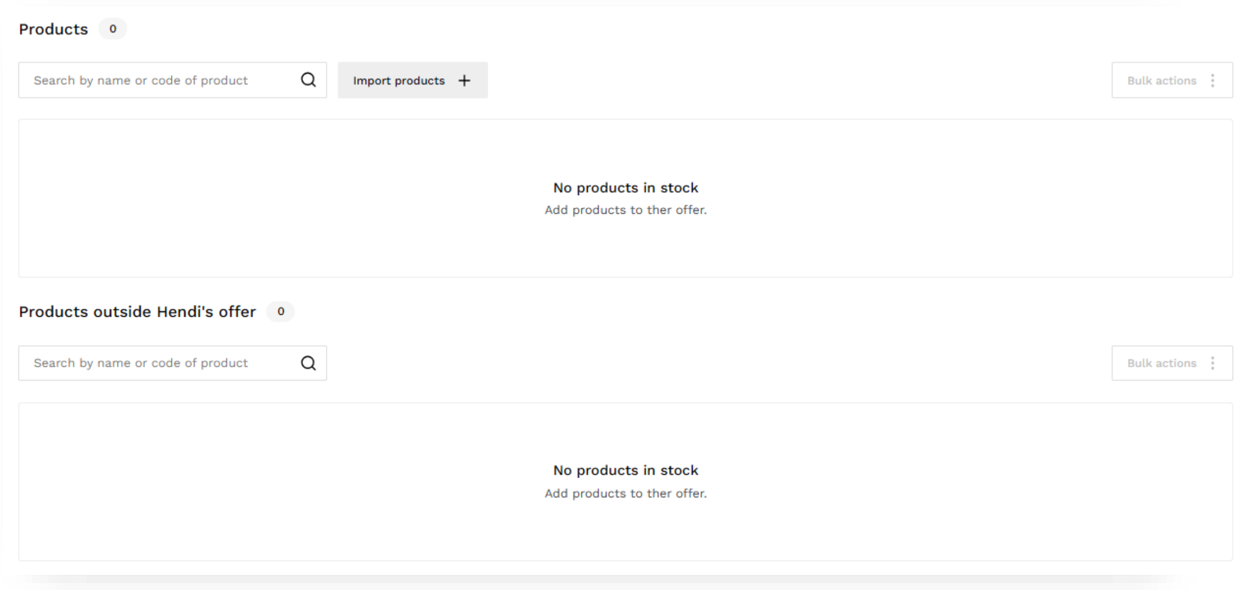


When adding a new contractor, enter the required data and save.

The contractor will be automatically added to our offer.

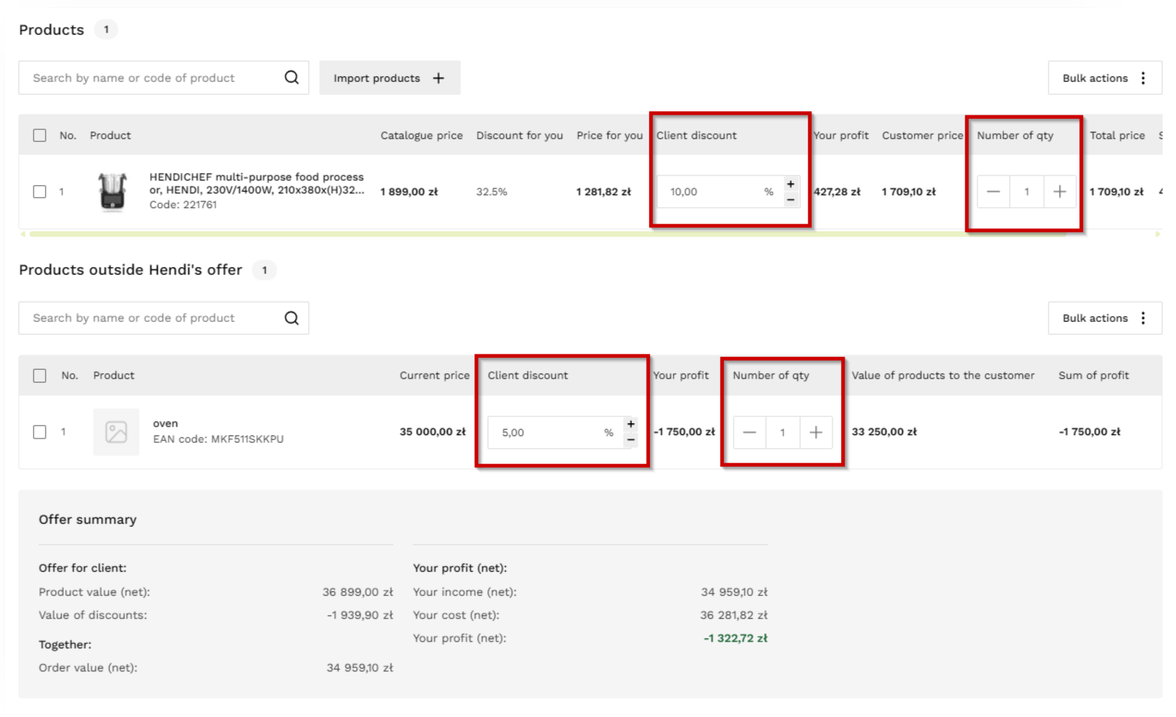


The offer can be supplemented with **HENDI products** and/or **non-HENDI products** (instructions on page 14).

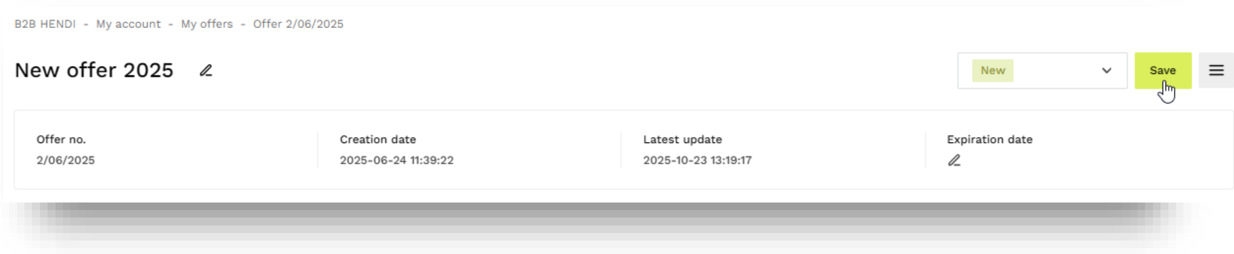


HENDI products are added in a similar way to adding products to the shopping cart - use the **Add product** option and then select the products you are interested in, or use the **Import products** from a previously created .xls/.csv file

After adding the products, we can set the discount for our customer as well as the number of products we currently want to sell. Offer summaries are available below both sections.



Once you have prepared your offer, save it by clicking the **Save** button at the top of the page.



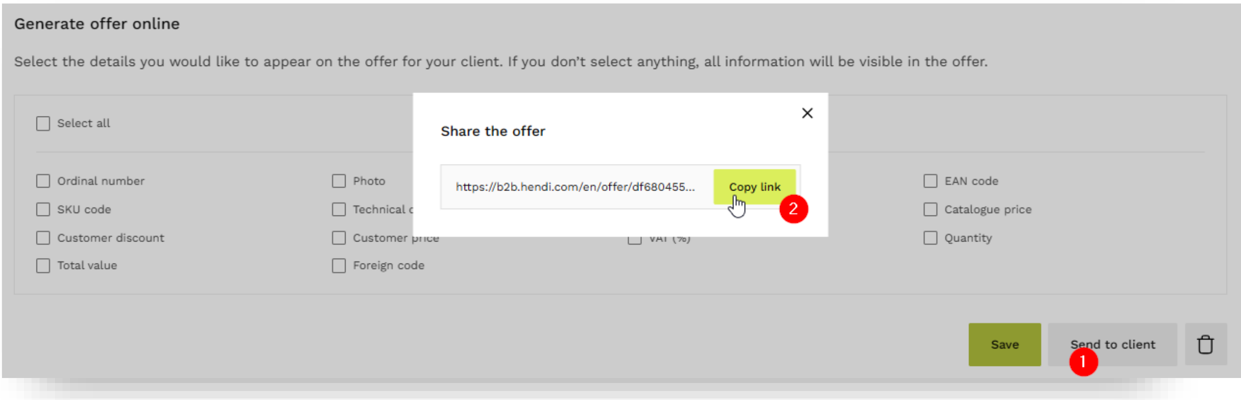
We can send our offer to the customer:

A. online as a link to a website

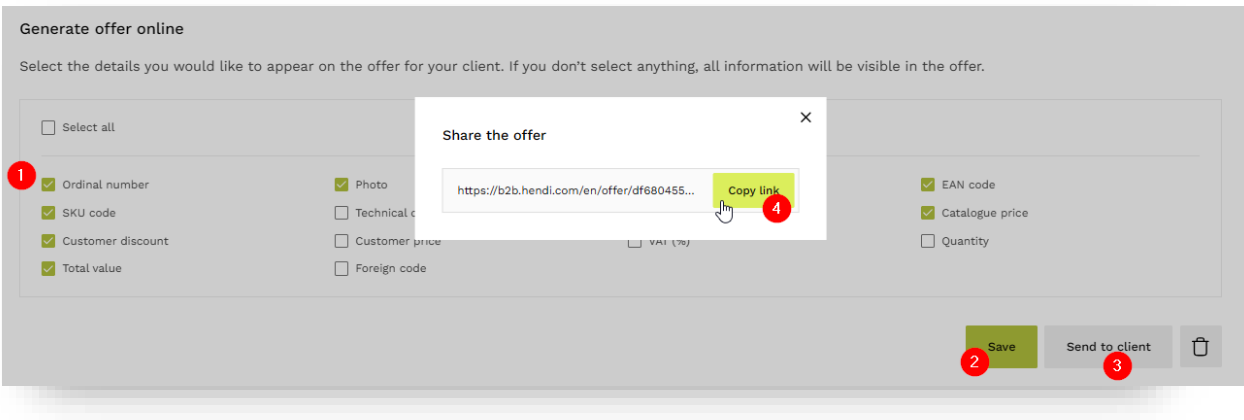
B. as an Excel file

C. as a Word file

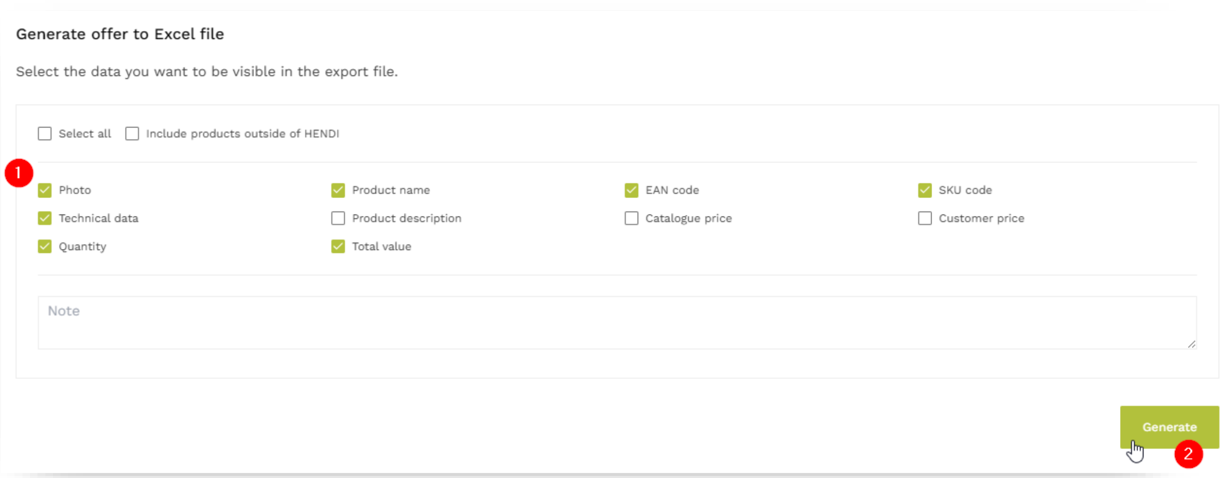
To send an offer online, go to the **Generate offer online** section, click **Send to client**, and then **Copy link**. Send the copied link to your client, e.g., by email.



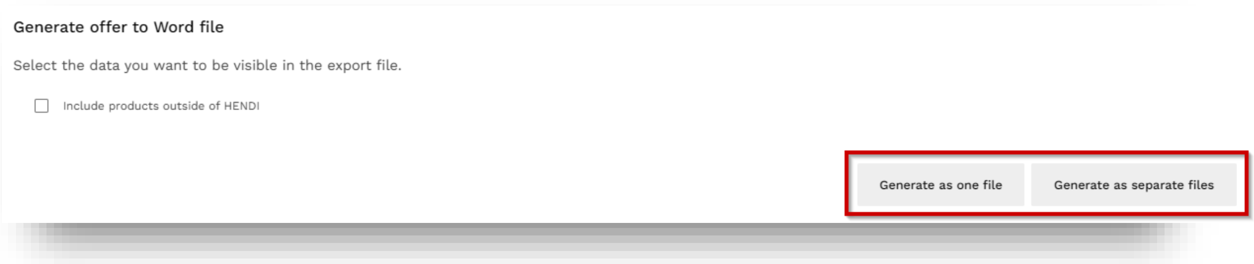
We can send an online offer with limited information. To do this, **select the data** you are interested in, then click **Save**, **Send to client**, and **Copy link**.



To generate an offer in an Excel file, go to the **Generate offer to Excel file** section, then **select the data** you want to be visible in the offer and click **Generate**. Save the generated file on your computer and then send it to your customer, e.g., by email.



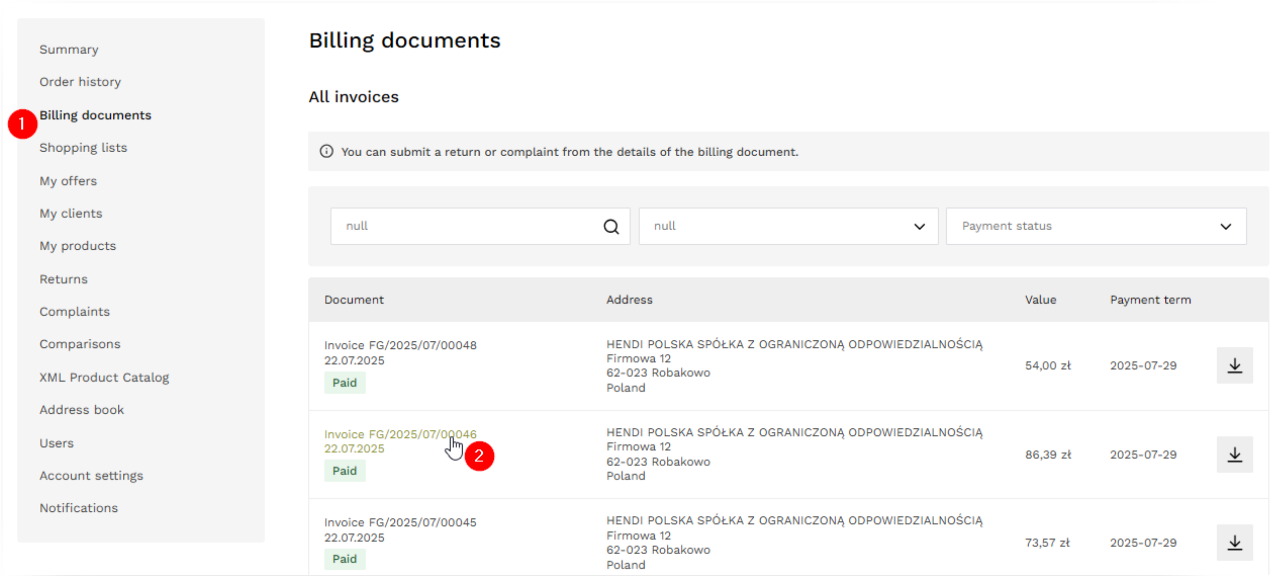
The last option is to generate an offer to a Word file in the form of a product card for one or more products. To do this, go to the Generate offer to Word file section and select one of the two options – **Generate as one file** or **Generate as separate files**.



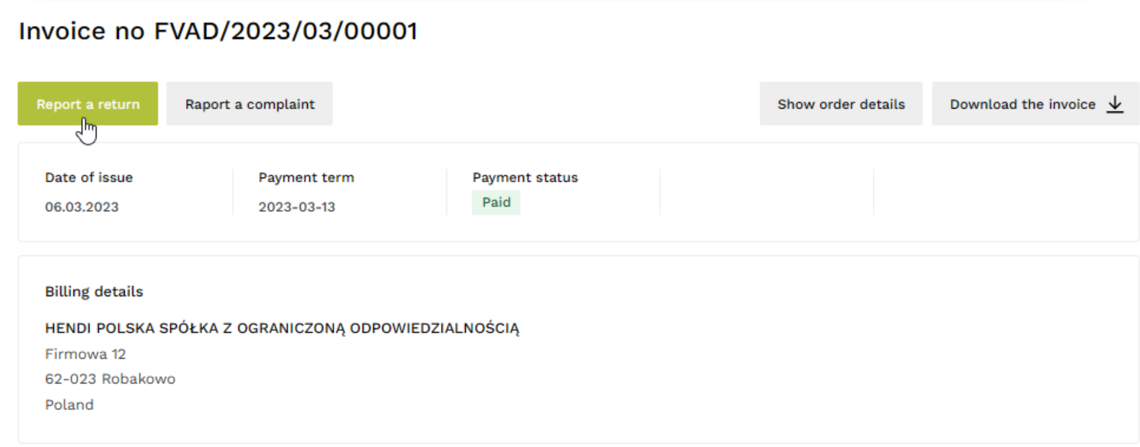
The saved offer can be found in the **Customer Panel** **My Offers**

Returns

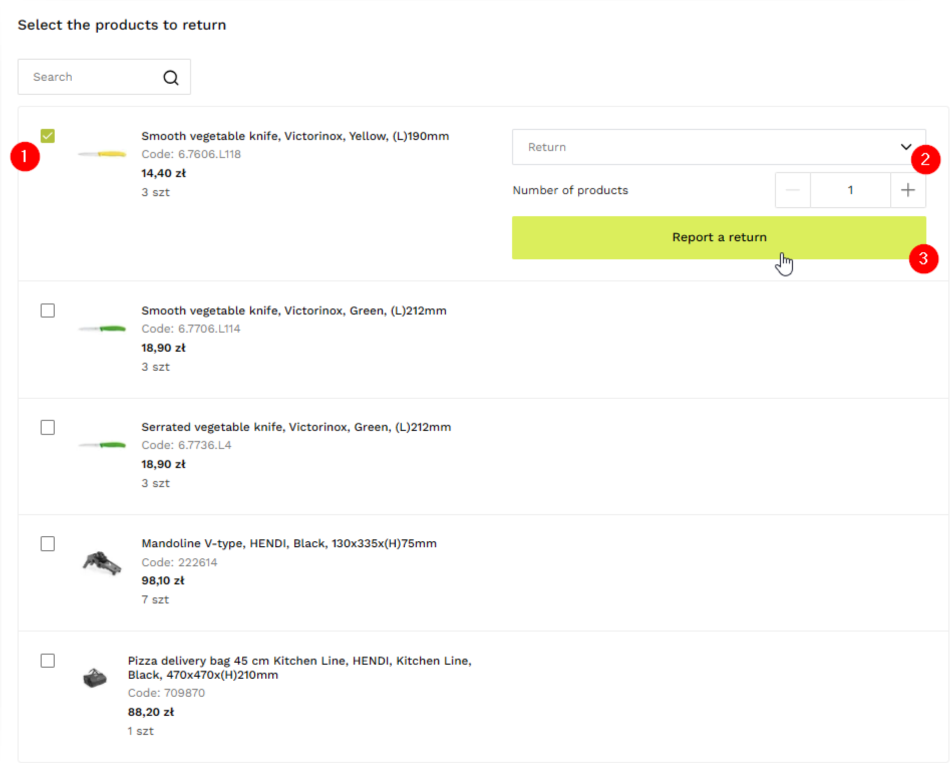
To report a return, go to the **Billing Documents** section and select the invoice for which you want to create a return.



From the invoice, click **Report Return** and you will be taken to a page with a list of products that were included in the invoice.

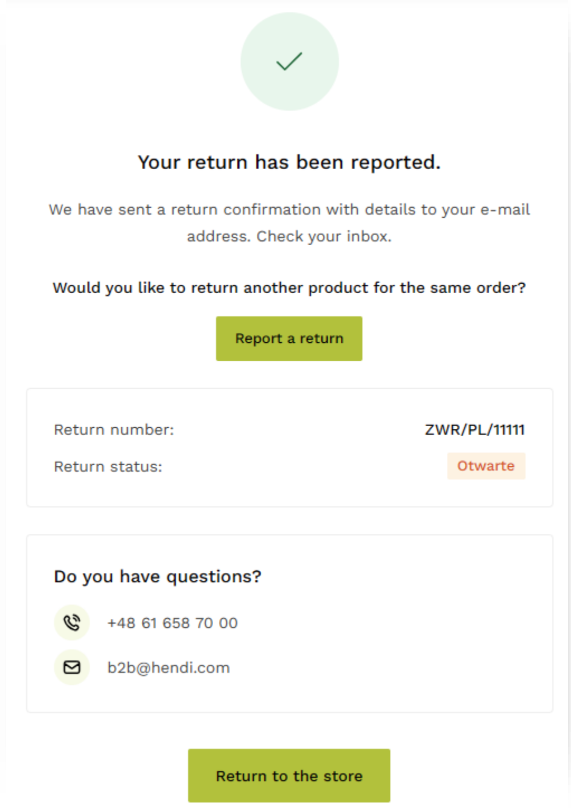


From the product listing, **select the product** you want to return, **give the reason** and click **Submit Return**.



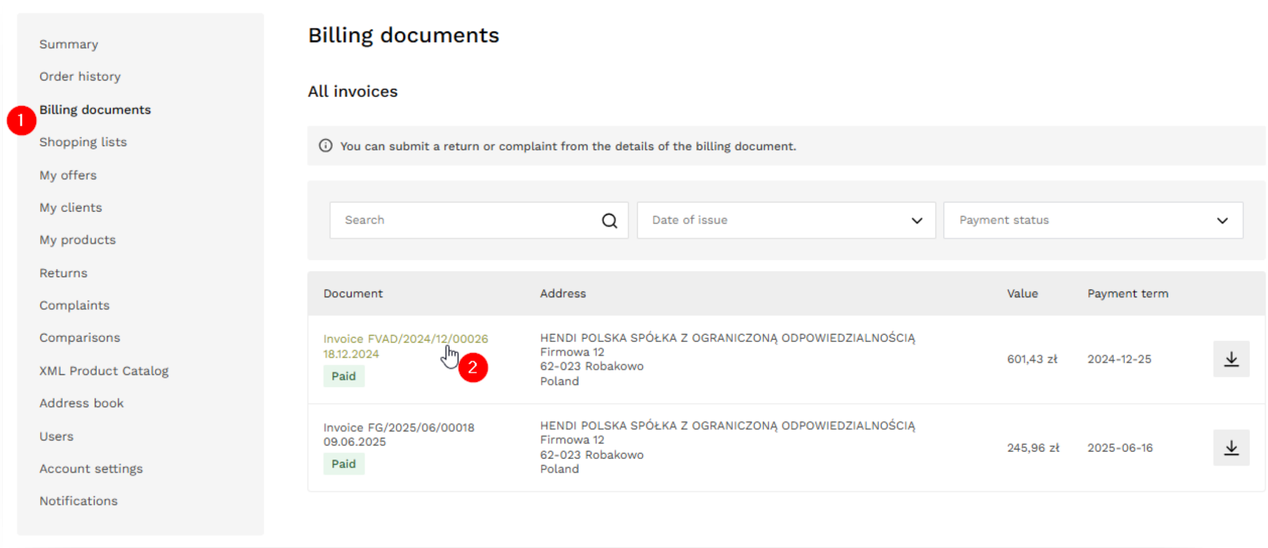
As a confirmation of acceptance of the request you will see appropriate message. Addition, to our address e-mail address will be sent a confirmation of the return notification.

If we want to report the return of another product for the same order, just click **Report a return**.

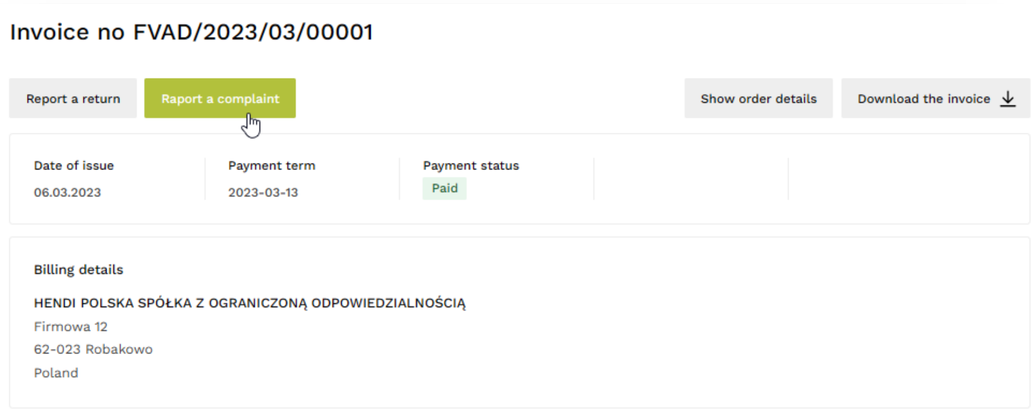


Complaints

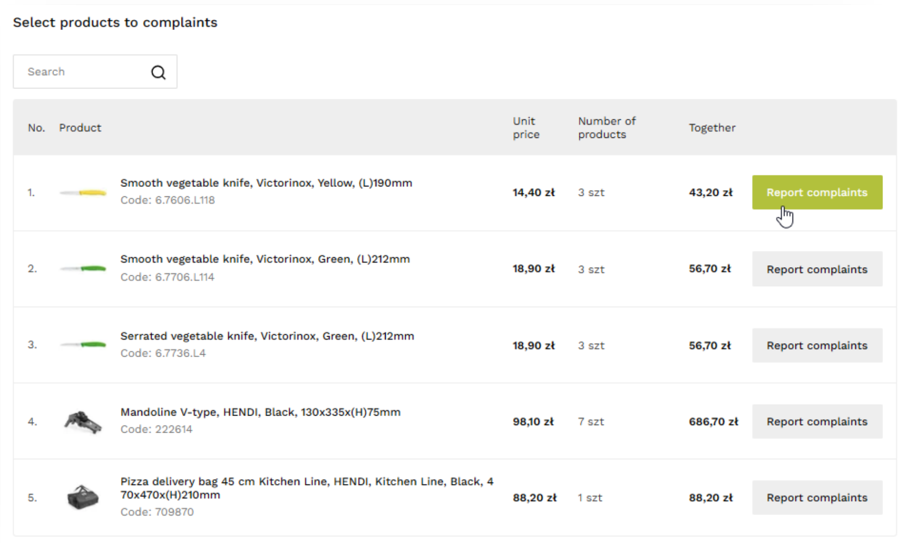
To report a claim, go to the **Billing Documents** section and select the invoice on which there is a product to report.



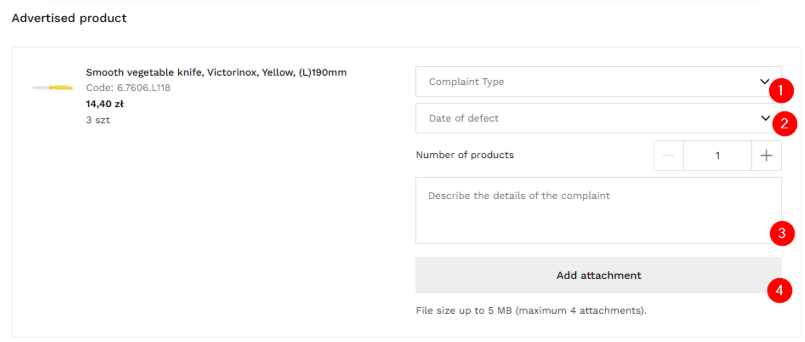
From the invoice, click on **Report a complaint**, after which you will be taken to a page with a list of products that were included in the invoice.



From the list of products we **select the product** we want to report by clicking **Report complaints**, after which we will be transferred to the complaint form.

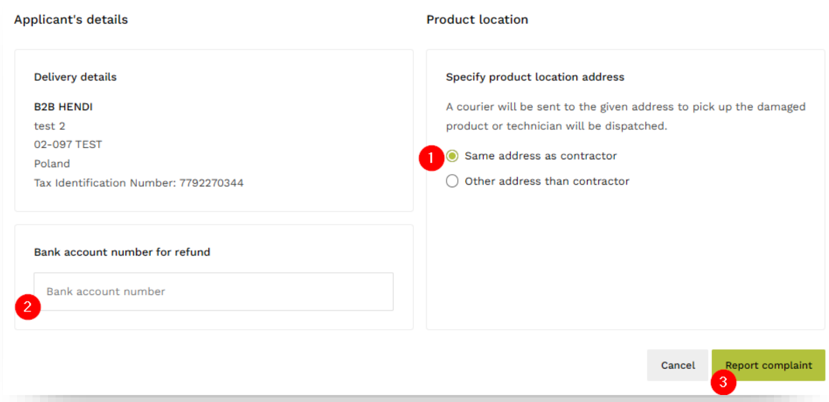


In the form, first select **the type of claim**, **the date of the defect**, enter **a description of the complaint** and add **attachments** (.pdf/.jpg/.png)



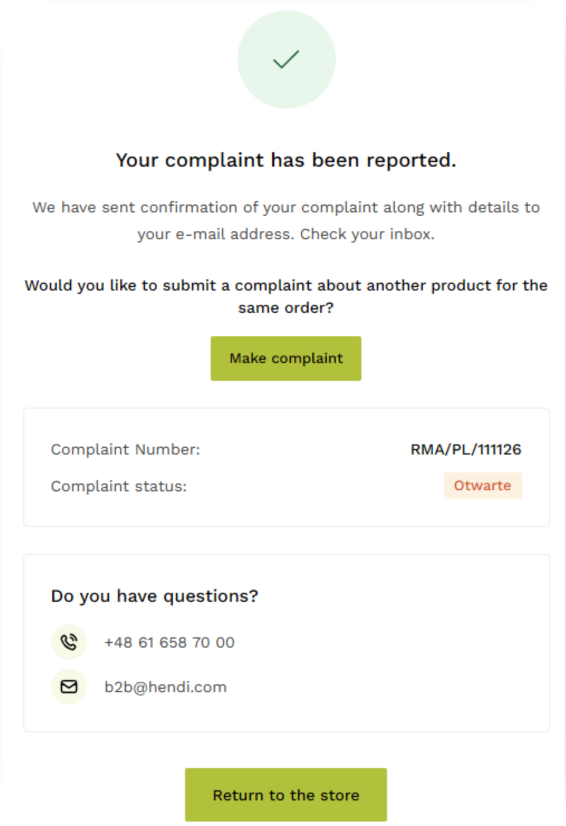
Then we proceed to determine the location of the product and possibly add a bank account number. As the address of the product location, we can indicate the same address we have given as the billing address or another address, such as the address of the customer to whom the goods were sent.

If the above information has been completed, click on **Report complaint.**



The following message will appear as a confirmation appropriate message. Addition, to our address e-mail address will be sent a confirmation of of the claim notification.

If we want to report the return of another product for the same order, just click **Make complaint**.

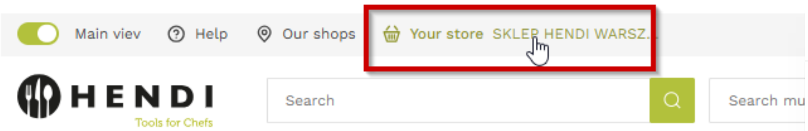


Other functionalities

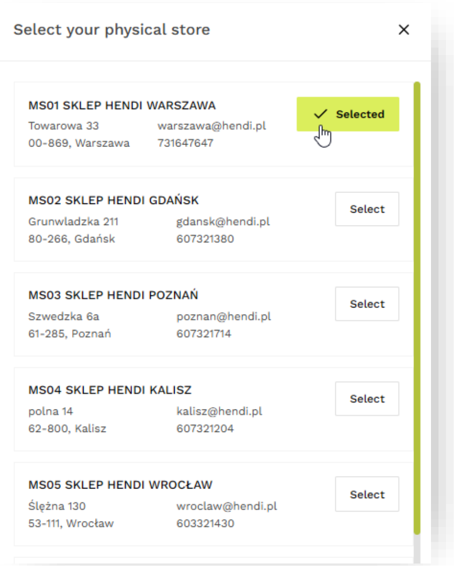
1. Stock status in HENDI company stores

Addition to the basic option of showing the availability of goods from our main warehouse, there is also the option of showing the stock from a previously selected HENDI company store.

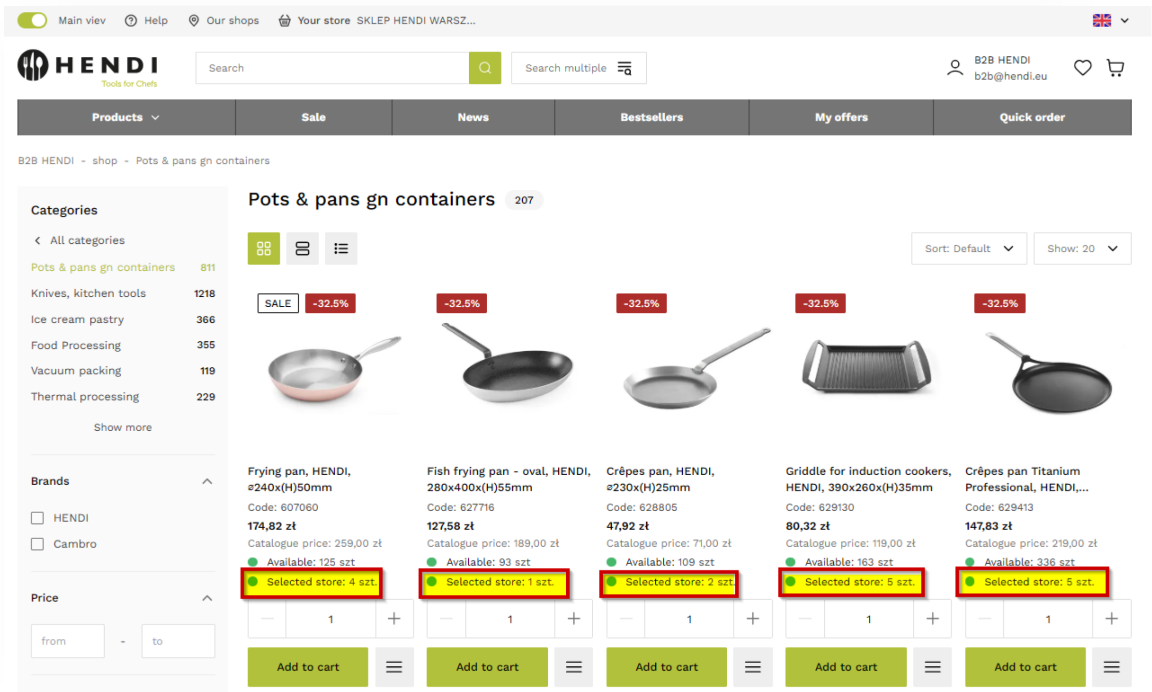
To assign one of the company stores, from the top of the page click **Select store**



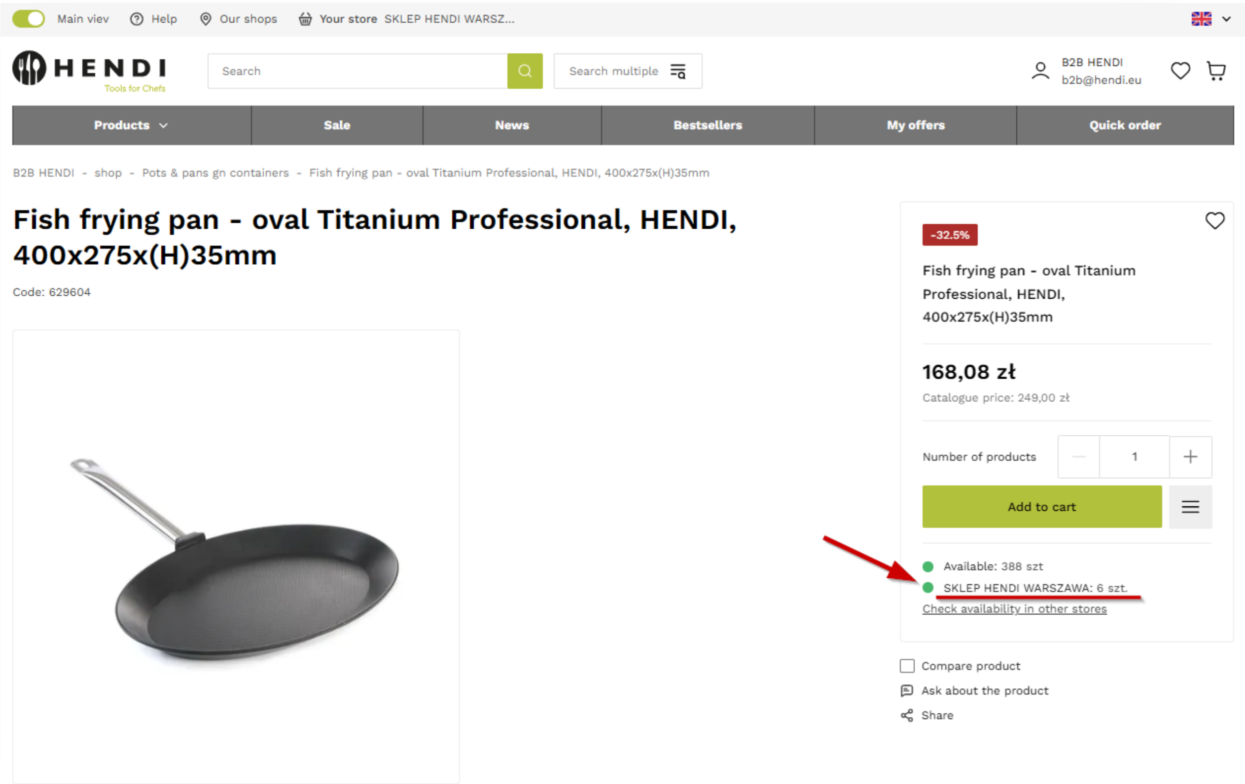
Then we need to select the store from which we want to receive the stock status of a particular product.



Information on the stock from the selected HENDI company store is presented in the product listings

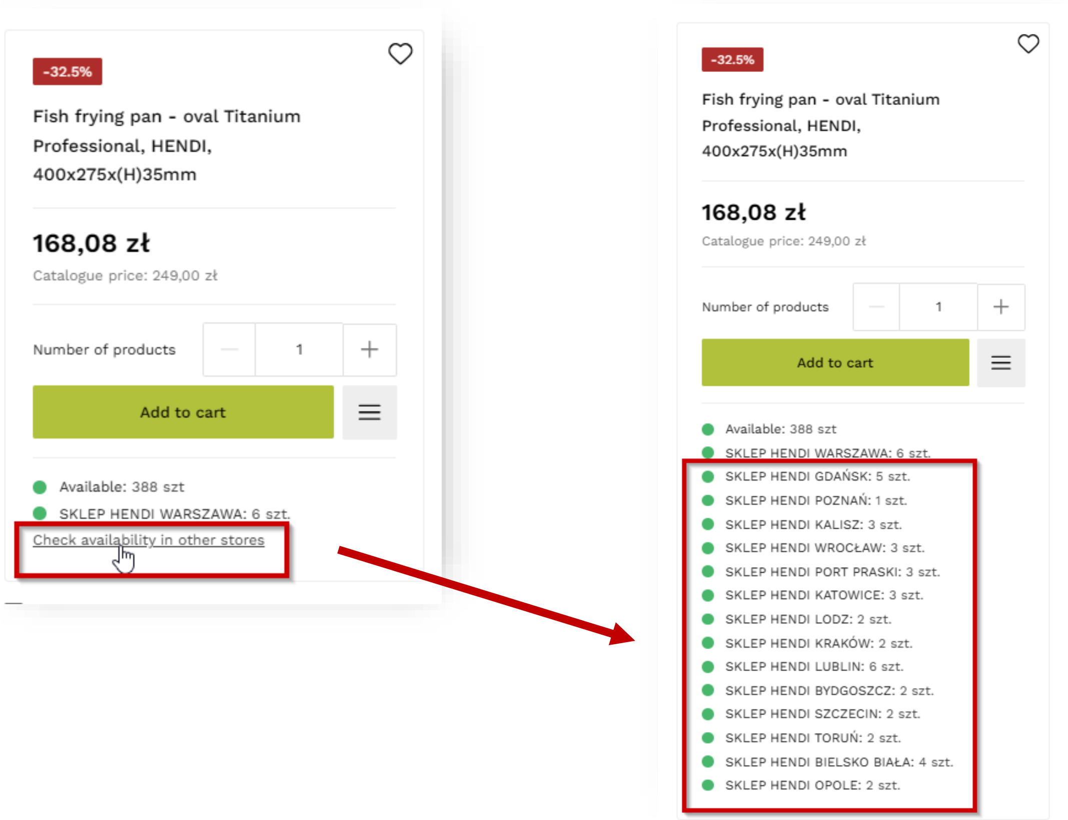


And on the product card



Addition, it is possible to check the stock status of our other company stores.

To do this, while on the product card click **Check availability in other stores**

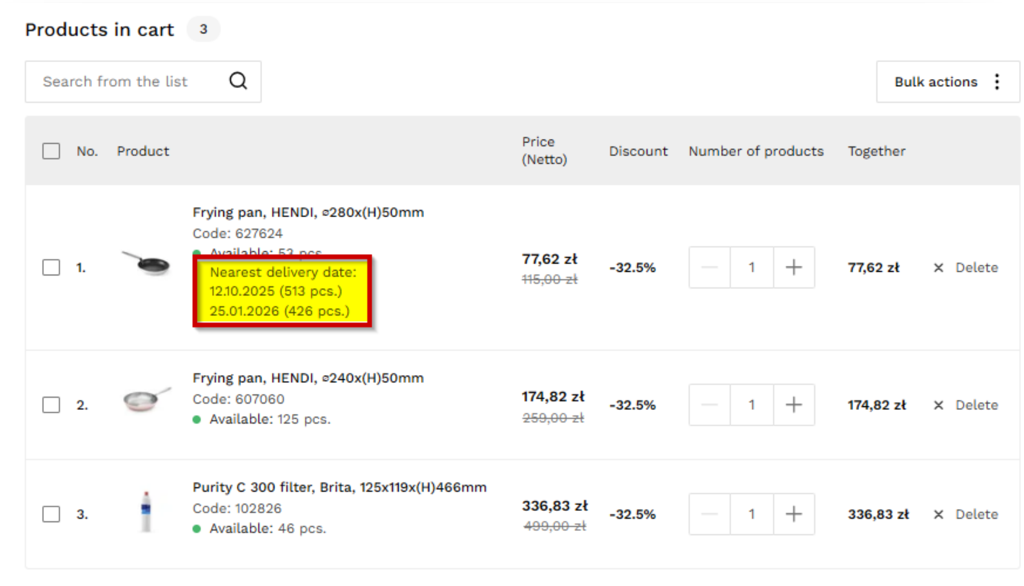


2. Planned delivery date

Planned delivery date is information from which we can learn about the nearest delivery of a given product to our warehouse. Please remember that this is only PLANNED delivery date. It can be changed at any time.

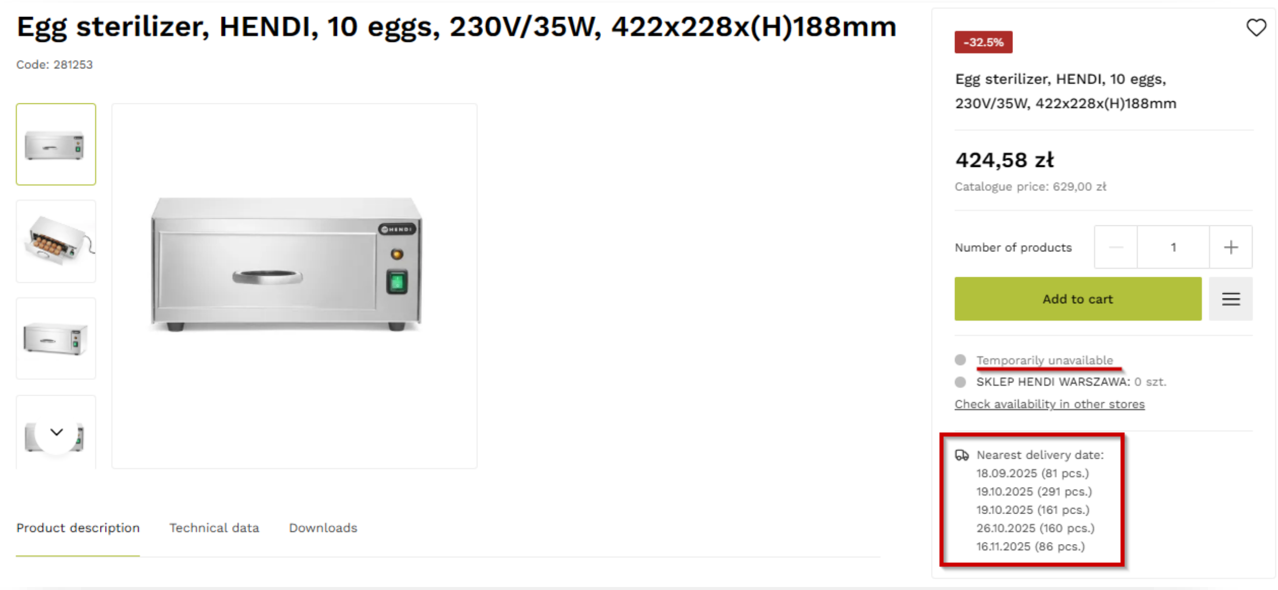
Information about the next delivery are placed on the product card

and in the shopping cart next to the product

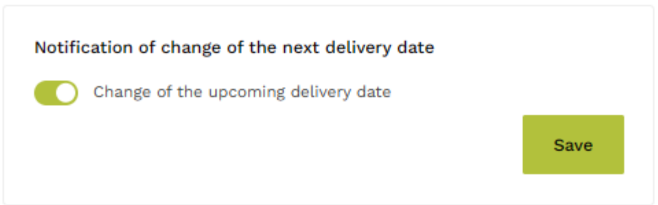


3. Notifications about changes to the next delivery

A notification about the change in the upcoming delivery will be sent to the email address of the user who placed an order for a product that is **temporarily unavailable** and who had information about an **upcoming delivery date**.



However, in order for notifications to be sent correctly, go to the **Client Panel** → **Notifications** and select the option to **change the date of the upcoming delivery**.



The message will contain information about which product the change is related to and in which order the product is currently included.

Notifications are sent only once a day.