

# Accounts

## Overview

Skava Commerce's Business to Business ("B2B") capabilities enable a business to serve business customers on its commerce platform. The Skava Commerce 8 Accounts microservice ("**Accounts**") powers this core B2B capability. Accounts automate B2B processes across enterprises, standards, and visibility for those processes.

Accounts help to integrate the B2B processes of Skava Commerce across sellers and buyers. Account has functionality that allows the business' customers to manage their organizational commerce needs on the Commerce platform as well as offer users the capability to easily manage each individual business account. It assists the buyer organization with managing cost centers with budgets on restricted time duration. The seller organization manages the contract for the buyer account. The contract enables the sales catalog, price list, and payment method. If the payment method supports the use of a purchase order, then the contract should enrich the payment term.

**Accounts** has the following features:

- **Easy Account On-Boarding:** Skava B2B now offers the self on-boarding option to your business customers and robust approval functionality so that your team has full control of your accounts. Additionally, your team can onboard new business customers using Skava Admin console.
- **Account Categorization by Account Type:** Segment your business customers for easy management. These segments can be custom types to suit your business needs for instance by industry or size of business like small, midsize, or large.
- **Account Contract Management:** Manage contracts for each account and use the Accounts microservice to track credit limit, payment methods allowed like credit cards, purchase orders (POs), and company bill-to.
- **Account-Based Catalog and Pricing:** Each of your customers can now get their own custom catalog and pricing on the Skava B2B commerce platform.
- **Account Management by Account Representatives:** Accounts lets your account managers and representatives manage individual accounts from within the Skava B2B commerce platform.
- **Buyer Cost Center and Team Management:** Skava B2B commerce platform lets your business customers manage their cost centers and teams, set budgets, manage order approval, etc. on the platform.

## Core Features

The key features in Accounts microservices are listed below:

- Easy self on-boarding of account via storefront

- Segment business customers by industry or size of business
- Manage individual contracts for each account to track the products, prices, categories & payment methods that need to be mapped.
- Assign account representatives to manage specific accounts
- Create & manage account-based custom catalog and pricing
- Allows your business customers to manage their cost centers and teams, set budgets, and more
- Preorder or backorder products
- Provide account-based promotions
- Allow a buyer org user to place orders within the budget limits of the cost center.
- Map a user to more than one cost center by a buyer admin
- Configure custom properties for accounts while creating and editing an account. **(New!)**
- Create and manage custom attributes for accounts & contracts. **(New!)**
- Associate a price rule to multiple accounts via contracts. **(New!)**
- Manage account and contract properties. **(New!)**
- Set default values and sequences for the attributes. **(New!)**
- Ability to retrieve prices for an account based on pricelist or price rules. **(New!)**

## Accounts Collection

When a B2B store is created in the Store microservice is automatically created and associated with the store. Unlike other microservices, this store-to-account collection cannot be modified. The account collection manages the account types, payment methods offered, and list of payment terms.

## Accounts Contract

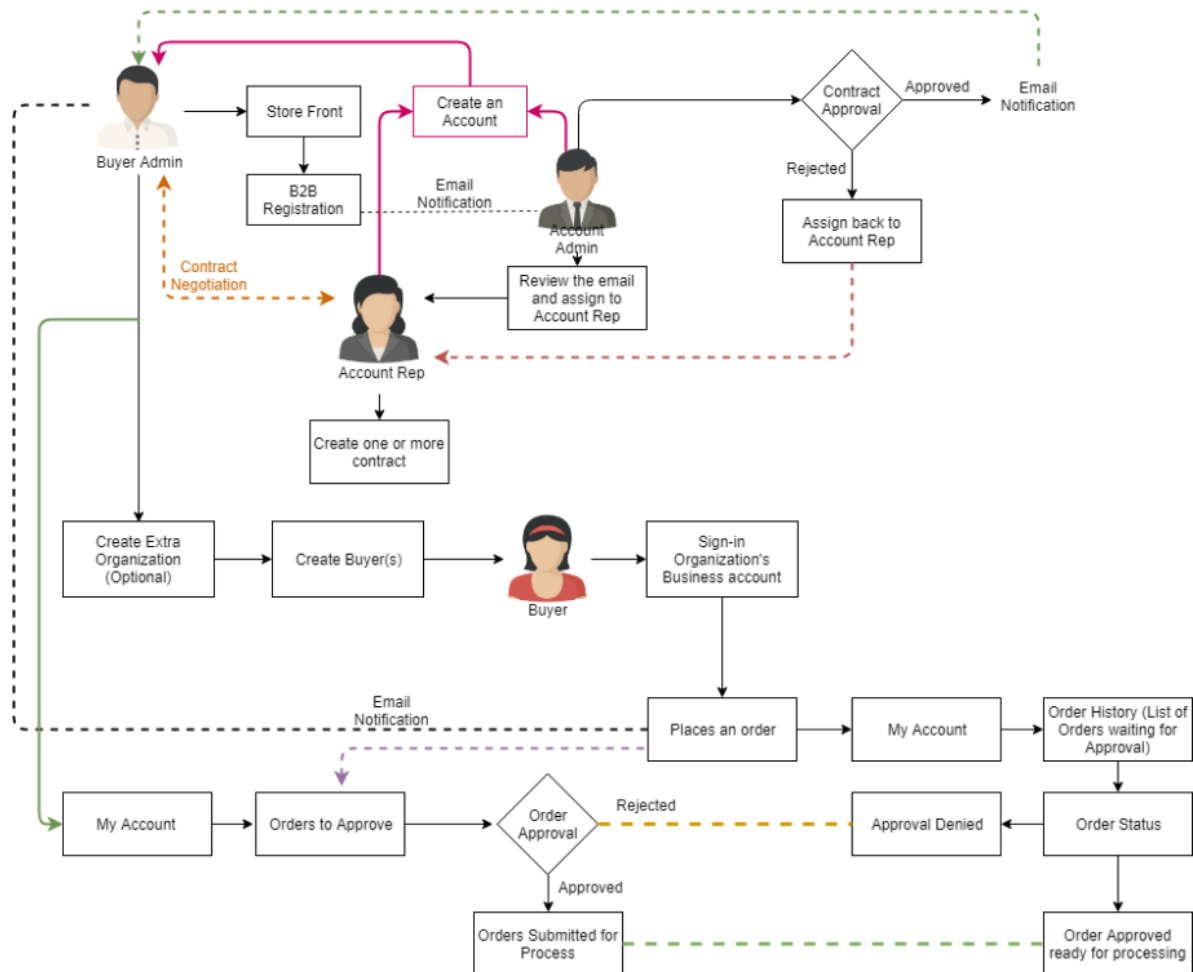
Each account within the account collection has a contract, which has the following elements:

- Catalog
- Price List
- Payment Methods
- Payment Terms
- Credit Limit
- Merchandising Site Navigation

## User Management

Skava Commerce B2B has two (2) sets of users: seller account users and buyer users.

- **Account Admin:** Can create an account, approve an account, assign it to an account representative for management, manage custom properties for accounts and contracts, and associate a price rule to the contract. **(Update!)**
- **Account Representative:** Can manage the account including contract, account users, account orders, custom properties for accounts, and associate a price rule to the contract. **(Update!)**
- **Buyer Admin:** Owns the buyer side account management, sets budgets, adds account users, teams, cost centers, and manage custom properties for accounts. **(Update!)**
- **Buyer:** Can view products on the storefront and add products to cart and to place orders.



## Revision History

2020-09-28 | HM – Updated the core features section.

2020-07-02 | SW – Updates for 8.9.0 release.

2020-03-27 | AN – Minor copyedits.

2019-09-17 | JP – Updated content for September 2019 release.

2019-06-08 | PLK – Minor copyedits.

2019-05-09 | AN – Minor copyedit.

2019-01-21 | PLK – Content uploaded.

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