B2B WORKFLOW AUTOMATION

USE CASES DOCUMENTATION

2025

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INTRODUCTION

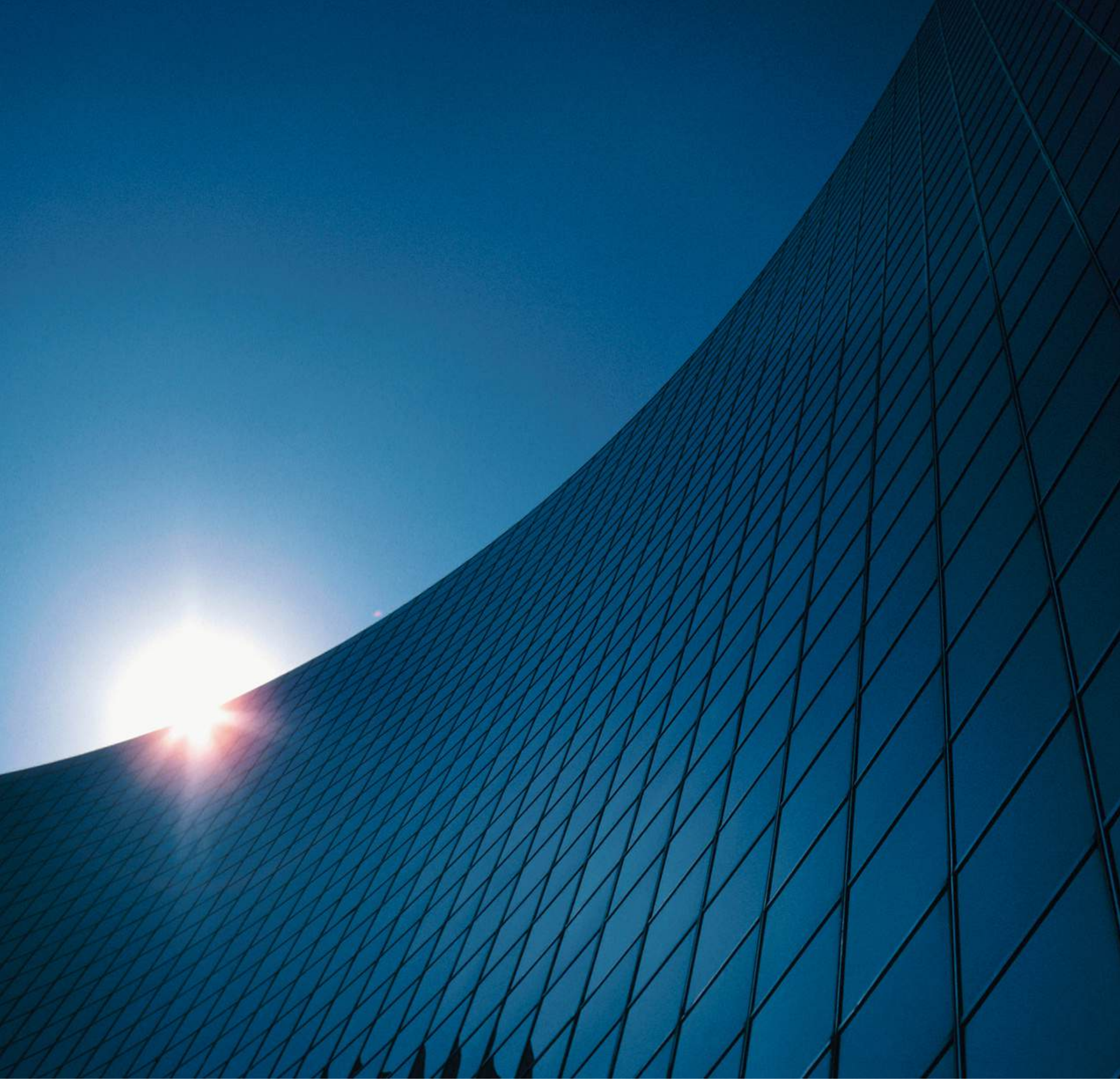
EXPLORE CONNECTPOS

Automate your BigCommerce store

Unlock operations effieciency

Automation B2B Software, developed by **ConnectPOS**, is a specialized automation solution tailored for enterprise merchants utilizing BigCommerce's B2B Edition. Building upon Atom8's robust workflow automation features, it offers seamless management across inventory, customer interactions, scheduling, and content tasks. This edition is tailored for business operations with exclusive capabilities, empowering businesses to automate complex tasks effortlessly, uniquely adapted for B2B dynamics:

- Quote & Invoice Management
- Company Management
- Order Management



USE CASES

Quote & Invoice Management

Create/ Update deals in CRM Platform

- **Use case description:** Automating the update of quote information in HubSpot ensures that newly generated quotes are seamlessly synced with the customer record and accurately reflect the customer's current pipeline stage.

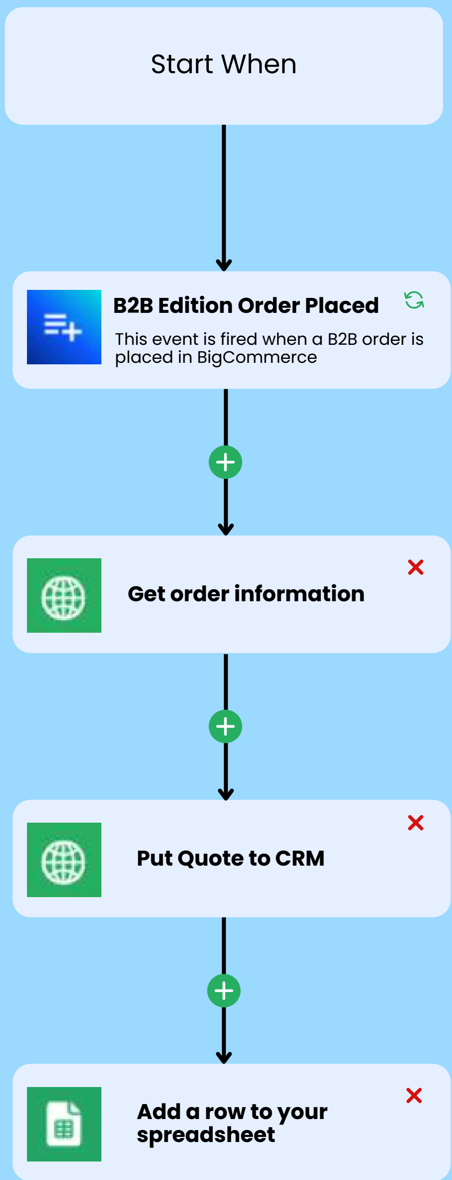
Trigger

- Quoted added
- Quote updated

Action

- Update deal (Integrate with 3rd Party Platforms via HTTP Requests) (*)

(*) Contact ConnectPOS for support.



Validate Min/Max Purchase Quantity at Product Level

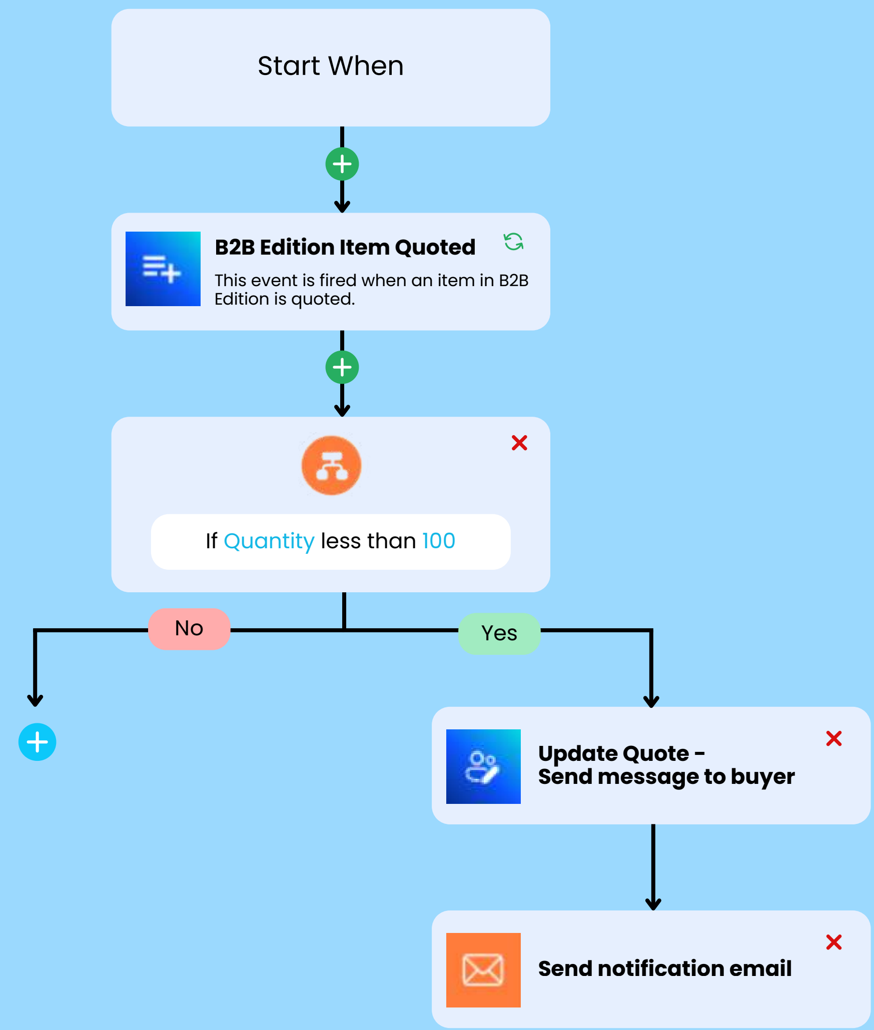
- **Use case description:** Validate the Minimum/ Maximum Purchase Quantity for Product Level
  - **Back-end:** Notify sales staff when a buyer's quote does not meet the minimum quantity required for additional discount rates, enabling effective follow-up with B2B buyers.
  - **Front-end:** Send a message to buyer to encourage buy more on the storefront.

Trigger

- Item quoted

Action

- **Send Email Notification** to Company Users & Sales Staff
- **Update Quote:** Add notes and allow checkout



Validate Quote's Expiration Date

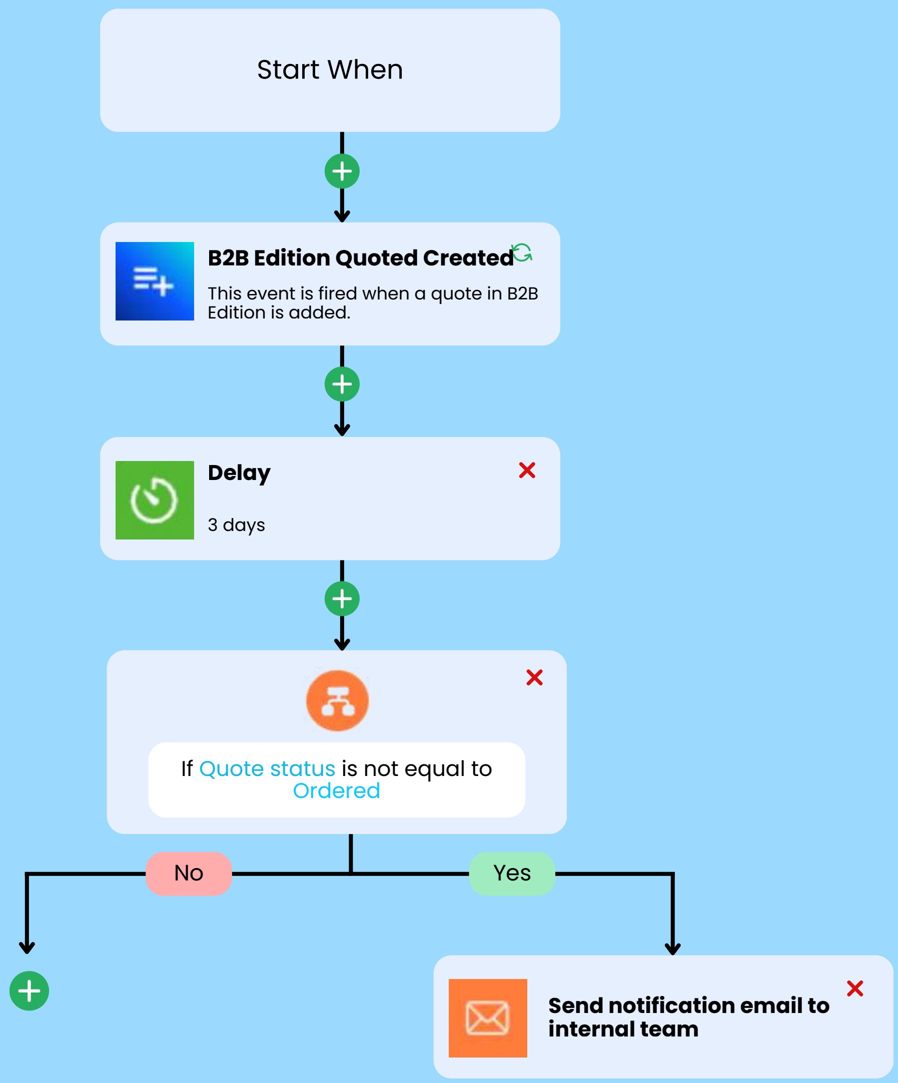
- **Use case description:** The system will notify B2B Buyers and sales staff X days before the quote expires. This helps companies update or convert quotes to orders on time. Sales staff can proactively communicate with buyers to avoid missed opportunities.

Trigger

- Quoted created
- Quote updated

Action

- Send Email to sales staff or buyers.



Update Quote Details to Google Sheets

- **Use case description:** All quote details, including status, items, addresses, and company info, will sync automatically to Google Sheets. Quotes will be organized by company, making it easier for sales staff to manage their deals. This helps track expiry dates, items, and prices efficiently for better follow-ups.

Trigger

- Quoted created
- Quote updated

Action

Insert or Update Rows in Google Sheets:

- Order ID
- Status
- Line Items
- Address
- Company info
- .....

Notify if Quoted Price below Base Price

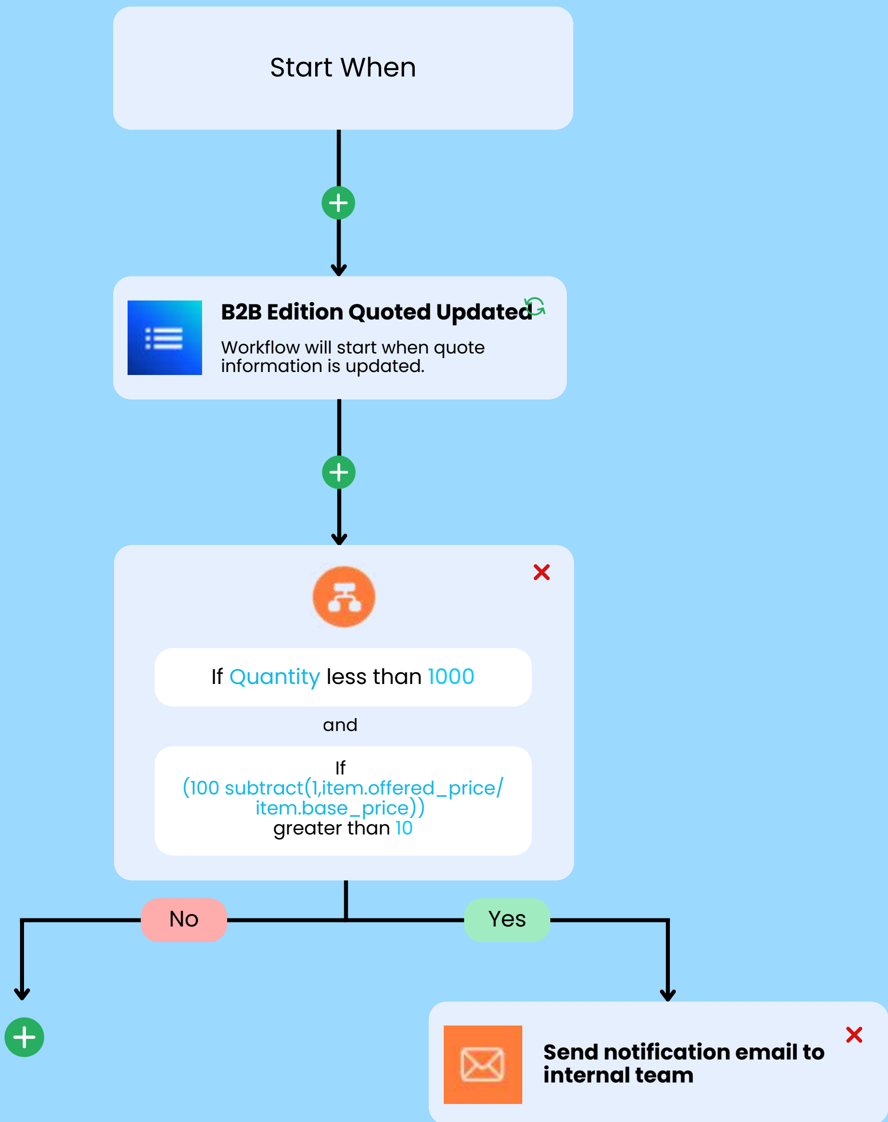
- **Use case description:** The system will compare the quote price to the base price by percentage. If the discount surpasses a predefined threshold, a notification will be sent to the store owner, alerting them to potential risks in confirmed quotes. In critical cases, the system can even disable the quotation to prevent unintended losses.

Trigger

- Quote updated

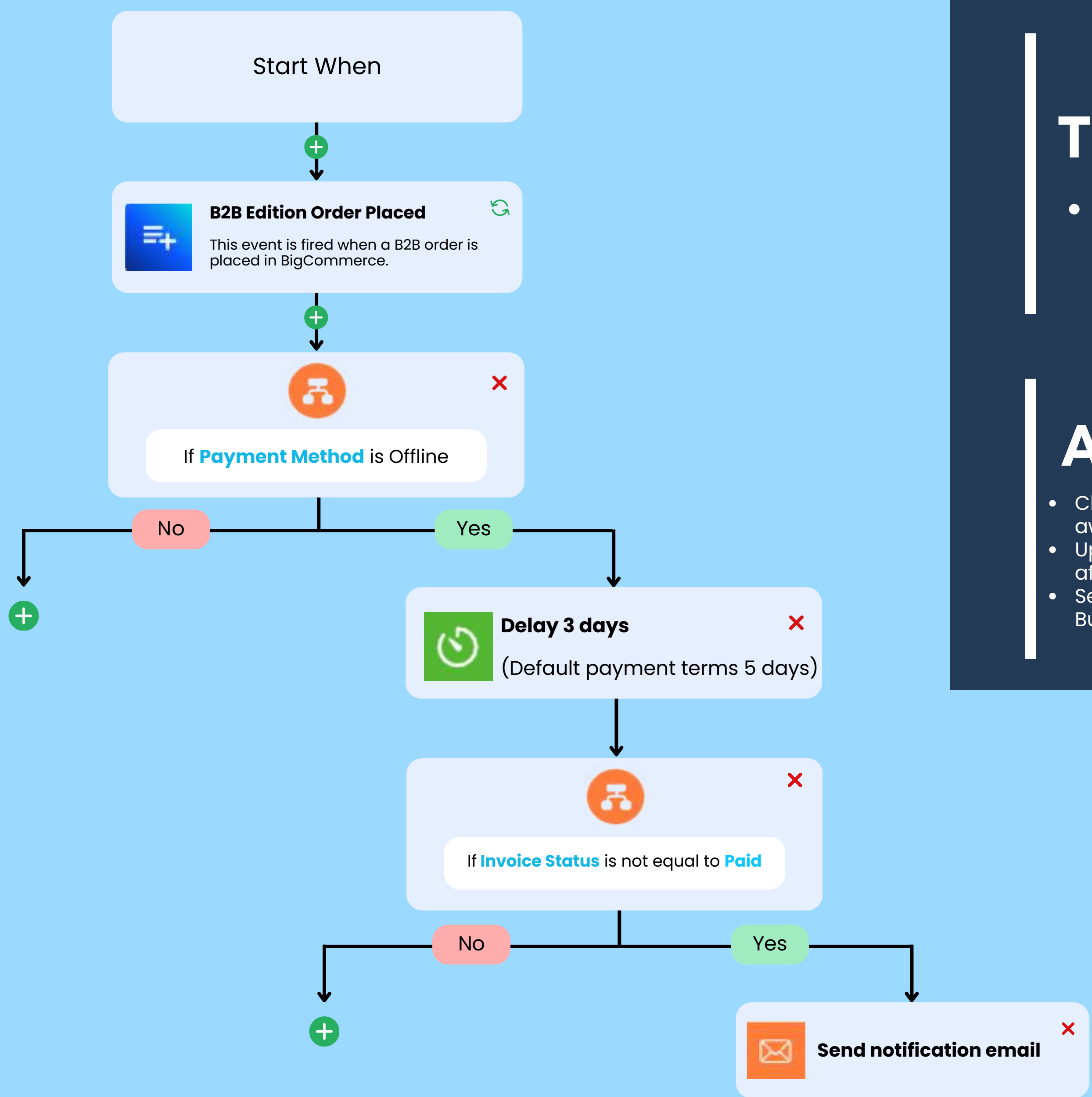
Action

- Send Email to Store owner/Administrator



Validate
Late Payment

- **Use case description:** Buyers often pay at checkout, but "Net Terms Payment" allows delayed payments. Atom8 tracks terms and notifies B2B buyers before payment deadlines.



Trigger

- Order Created

Action

- Change order status into awaiting payment
- Update payment method after X days
- Send Order email to Buyers

USE CASE #7- QUOTE & INVOICE MANAGEMENT

Create Invoice for Manual Payment Orders

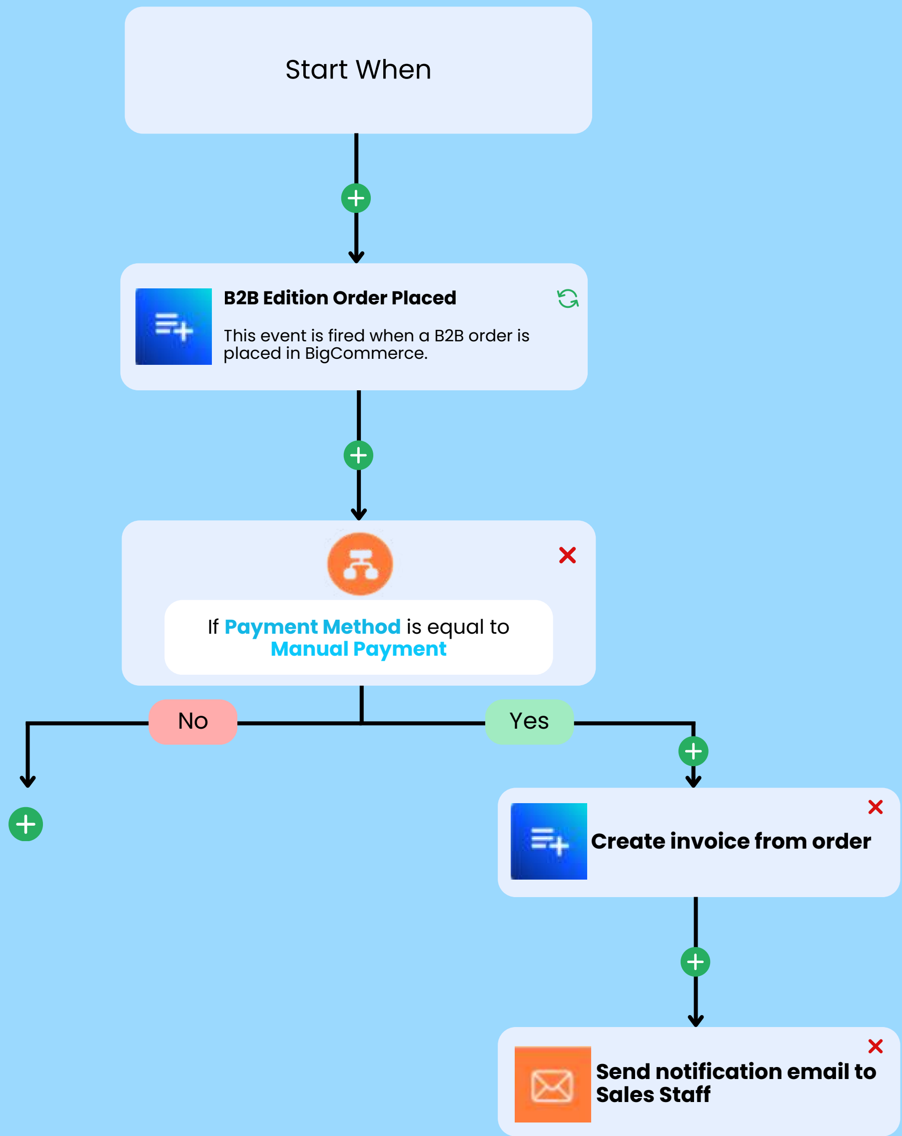
- **Use case description:** When an order is placed using manual payment (bank transfer), the system will generate an invoice and send it to the customer. This ensures that customers receive clear payment instructions and records for their order.

Trigger

- Order placed

Action

- Create invoice from order
- Send notification email



USE CASES

Company Management

USE CASE #8 - COMPANY MANAGEMENT

Set Store Credit to Approved Companies

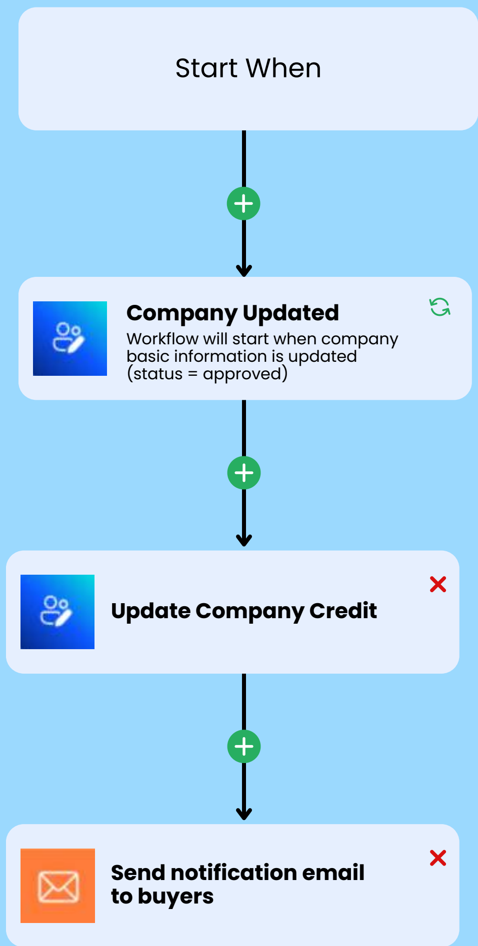
- **Use case description:** To streamline the process of granting store credits, the system will automatically allocate a predefined amount of store credits to newly approved buyers. This eliminates the need for manual intervention by sellers, ensures consistency in the process, and also encourages new buyers to make their first quote.

Trigger

- Company approved

Action

- Update Company Credit



Segment Companies based on Behavior and Information

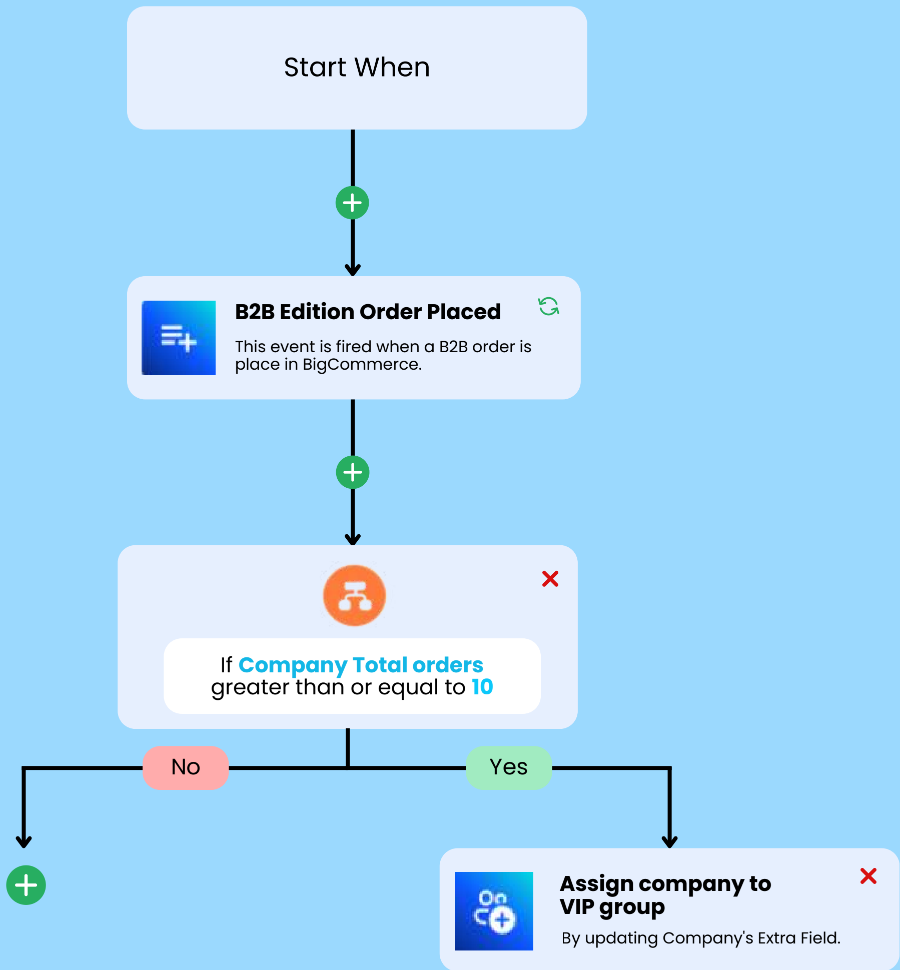
- **Use case description:** Store merchants can categorize companies by purchasing behavior, such as total order value or quantity, as well as other details like addresses and industry information using updating company's extra field. These company segments will be displayed in a list for easy management.

Trigger

- Company created
- Company updated
- Order placed

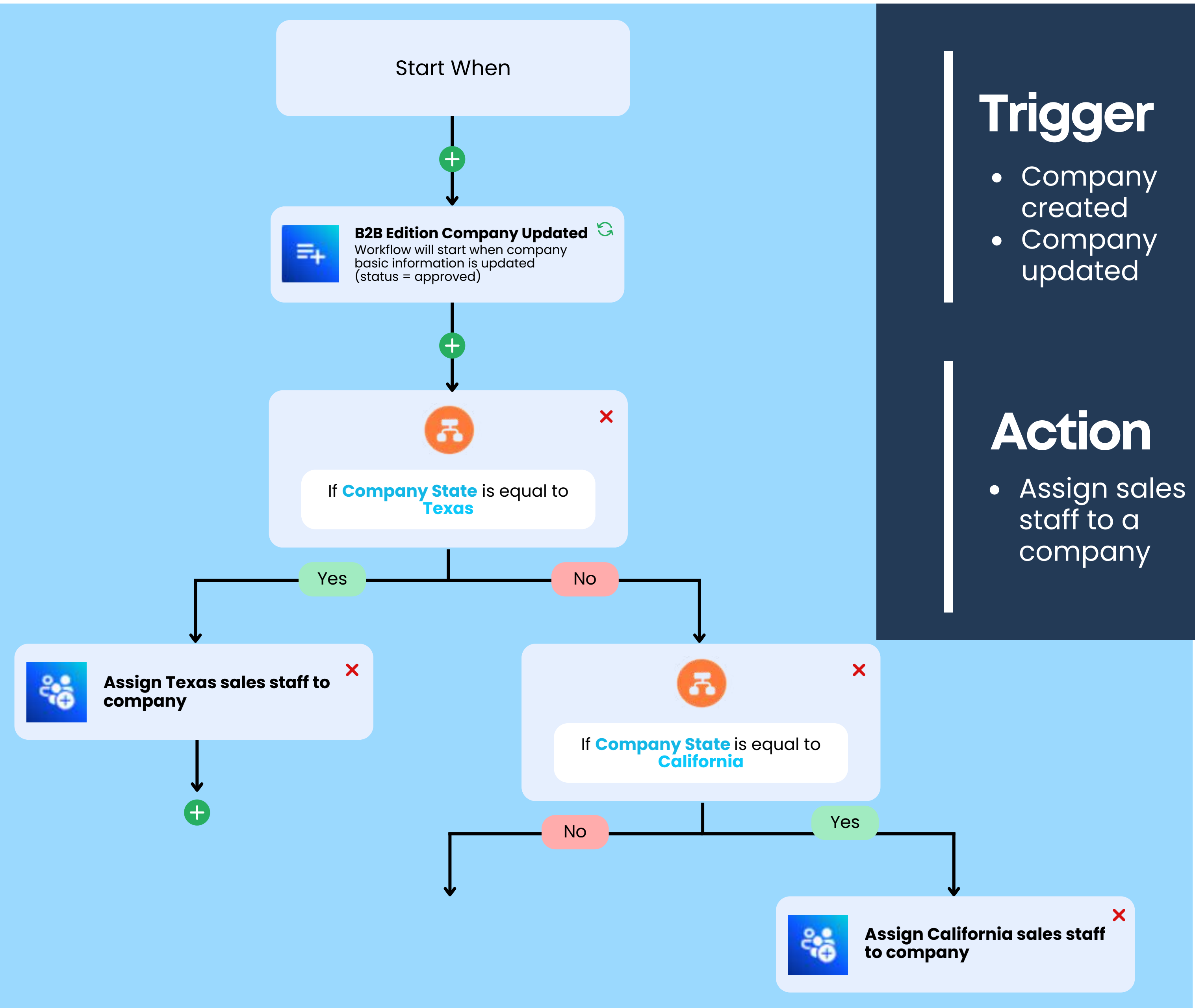
Action

- Update company's extra field



Assign Sales Staff to Companies based on Criteria

- **Use case description:** The system will automatically assign sales staff to companies based on predefined criteria, such as industry, business model, region, and purchasing behavior. This ensures efficient alignment between sales staff expertise and company needs, streamlining the assignment process.



Trigger

- Company created
- Company updated

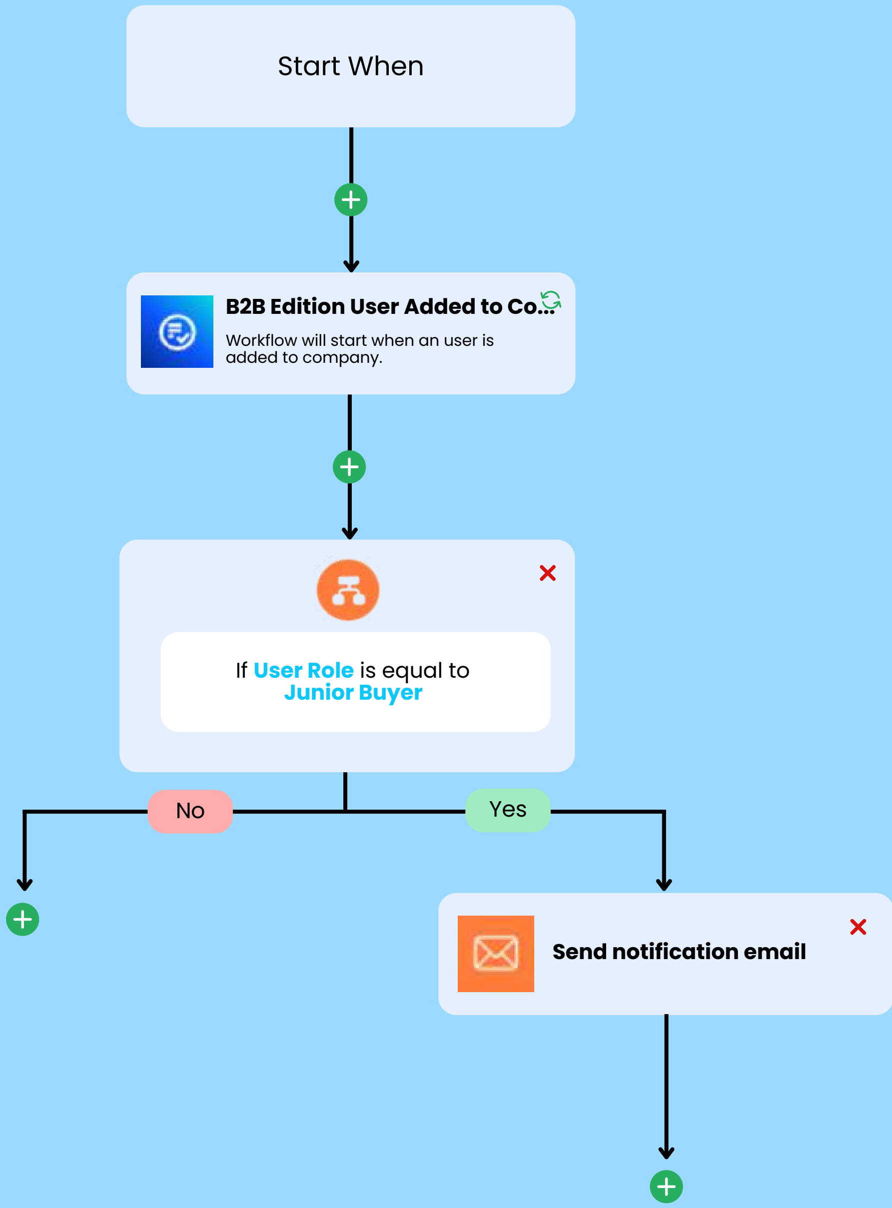
Action

- Assign sales staff to a company

USE CASE #11 - COMPANY MANAGEMENT

Onboard New Company Users

- **Use case description:** New company users will receive an onboarding email containing essential resources, including the B2B buying process, quoting instructions, and sales staff contact details. This ensures users are equipped with the necessary information to navigate the platform effectively.



Trigger

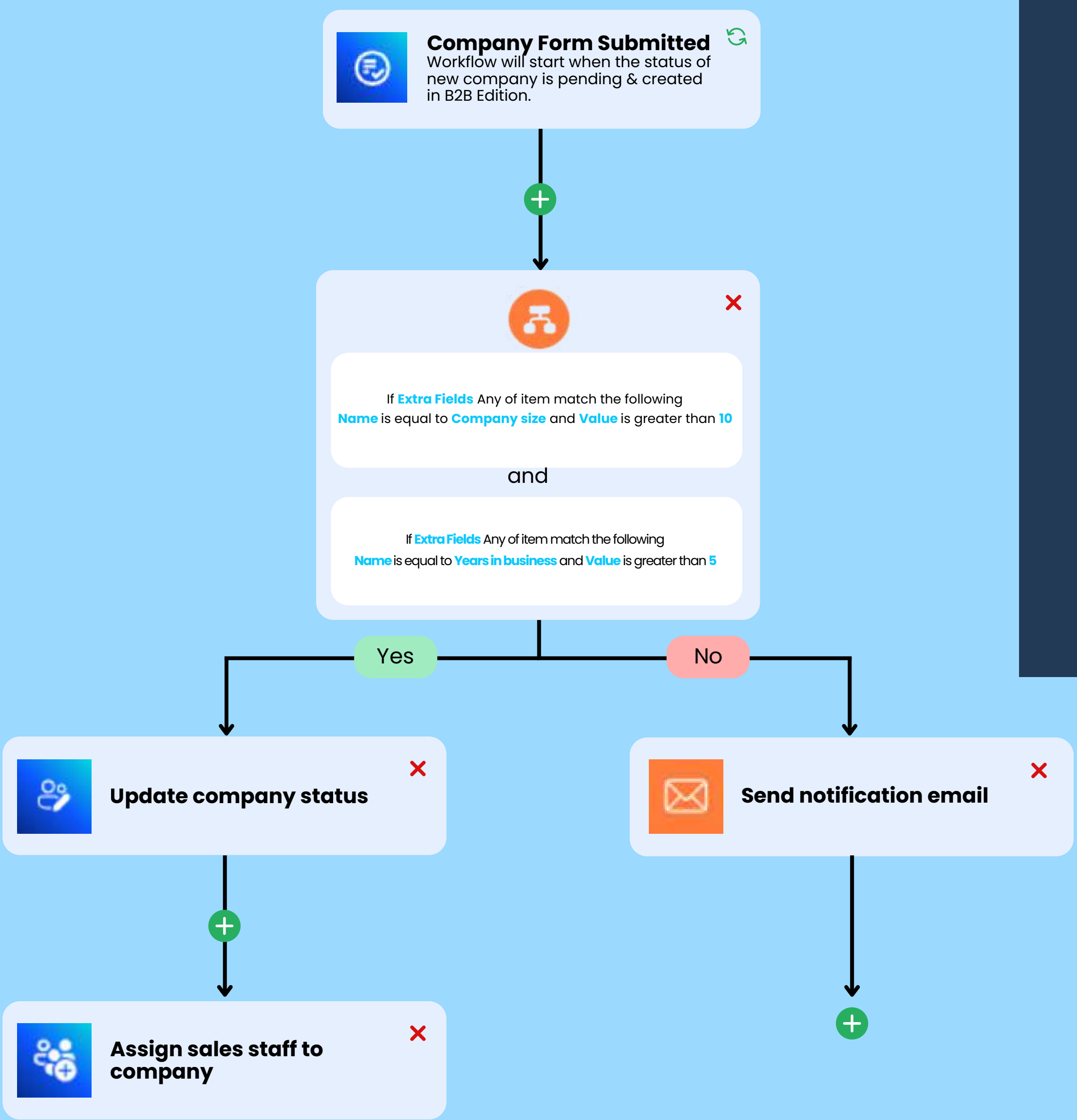
- Users added to company

Action

- Send email

Automate Company Approval Process

- **Use case description:** When a new company submits a form to register as a B2B buyer, the approval process is automatically triggered. Based on pre-defined terms, the system can streamline approvals, ensuring a smooth onboarding experience while granting users access to necessary resources and support.



Trigger

- Company form submitted

Action

- Update company status
- Assign sales staff
- Send notification email

USE CASE #13 - COMPANY MANAGEMENT

Import Companies from Google Sheets

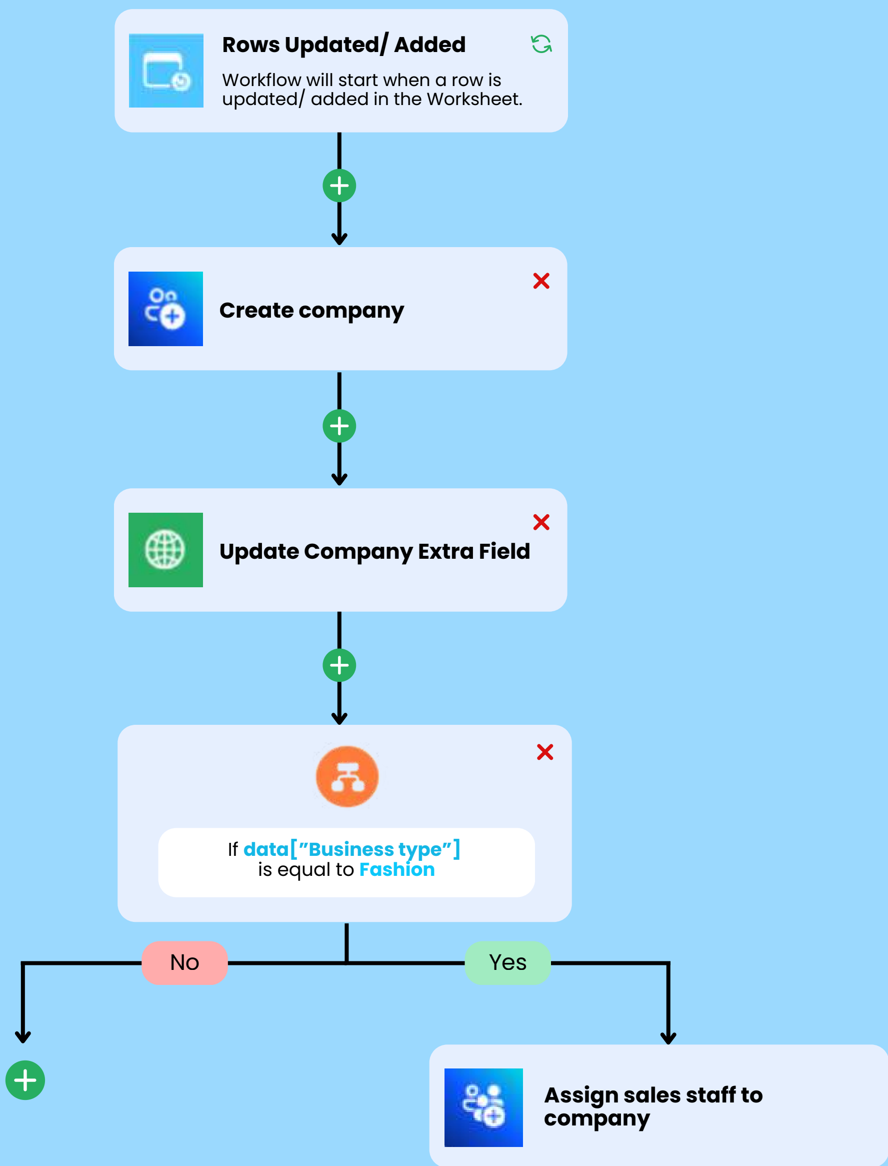
- **Use case description:** Sales staff can gather new leads from sources like offline events and store them in Google Sheets. The system will import company data, including company name, owner email, and other information, directly from the sheet for seamless integration and management.

Trigger

- Rows updated
- Rows added

Action

- Create company
- Create a customer (create company owner account)



USE CASE #14 - COMPANY MANAGEMENT

Sync Company Information with CRM Platforms

- **Use case description:** When a new company is created in the B2B Edition, the system will automatically create a corresponding company contact in the connected CRM platform (e.g., HubSpot).

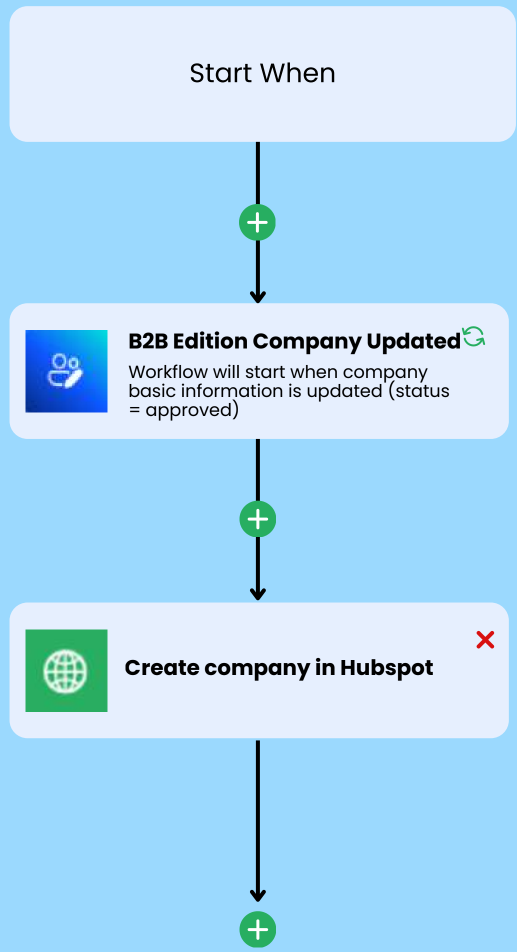
Trigger

- Company created

Action

- Create a new contact (HTTP Request or integrate with CRM) (*)

(*) Contact ConnectPOS for support.



Assign Sales Staff to Company in CRM Platforms

- **Use case description:** The system will automatically assign sales staff to companies in connected CRM platforms (e.g., HubSpot) based on predefined criteria.

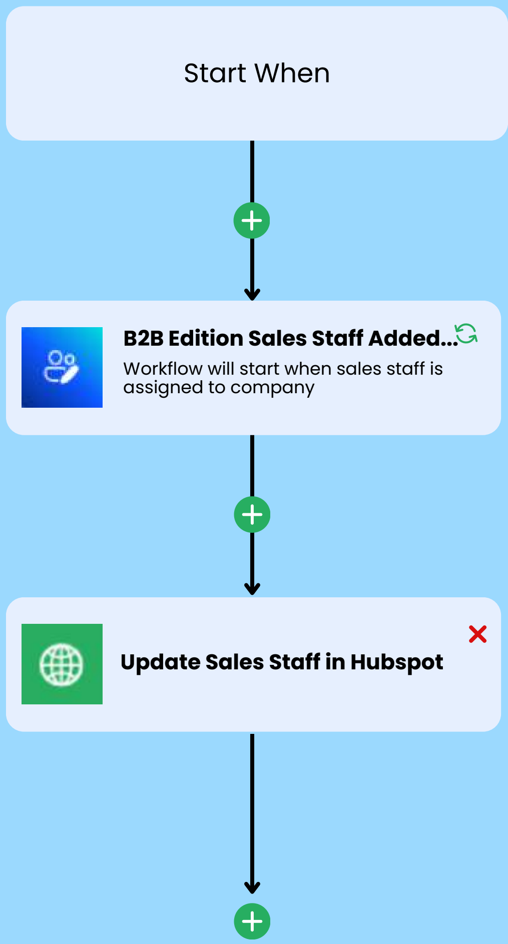
Trigger

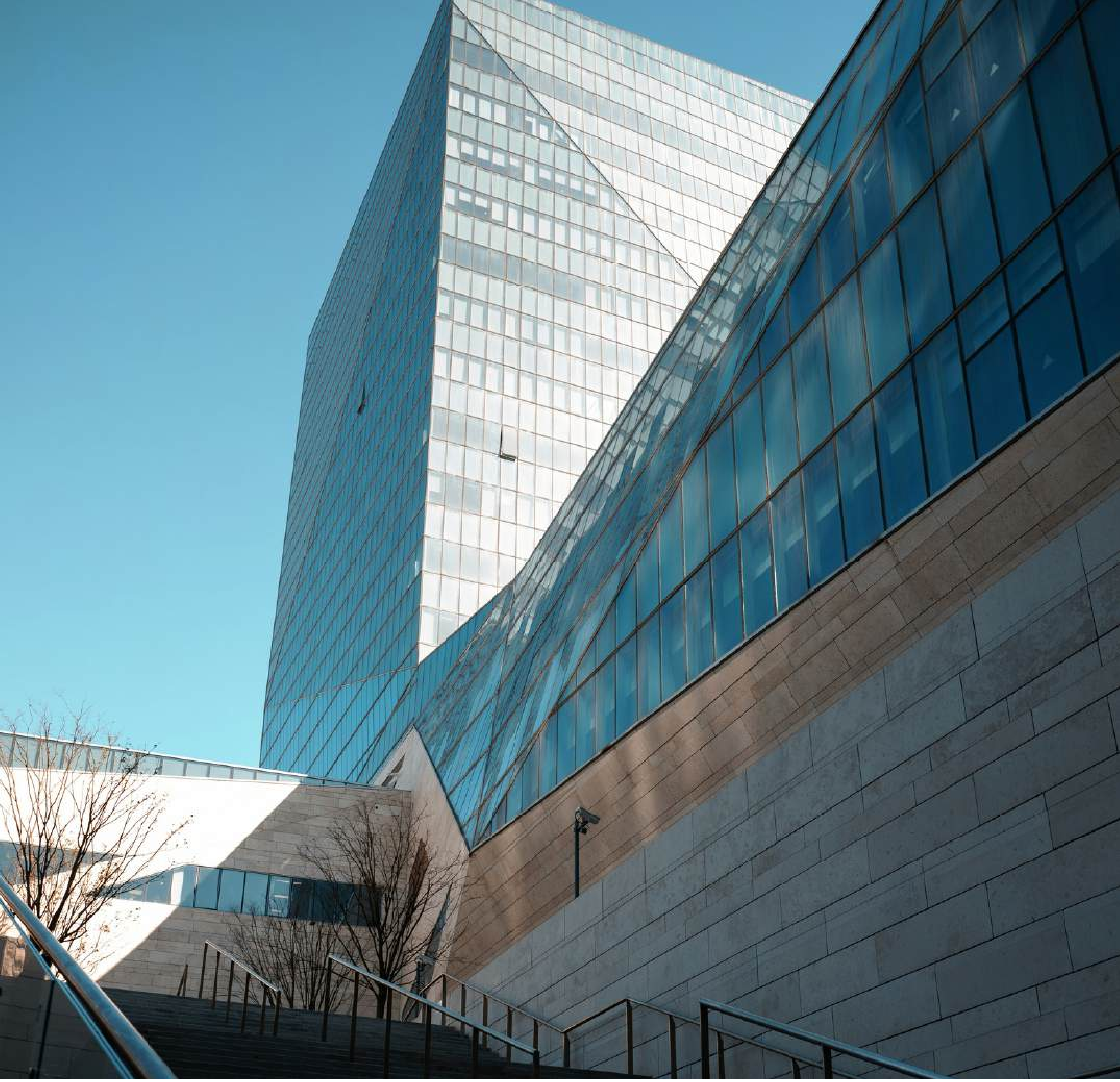
- Sales staff added to company created

Action

- Update sales staff in a contact (HTTP Request or integrate with CRM) (*)

(*) Contact ConnectPOS for support.





USE CASES

Order Management

Update Deal Information in CRM Platform

- **Use case description:** When an order or quote is updated in the B2B Edition, the system will automatically create a corresponding company contact in the connected CRM platform (e.g., HubSpot).

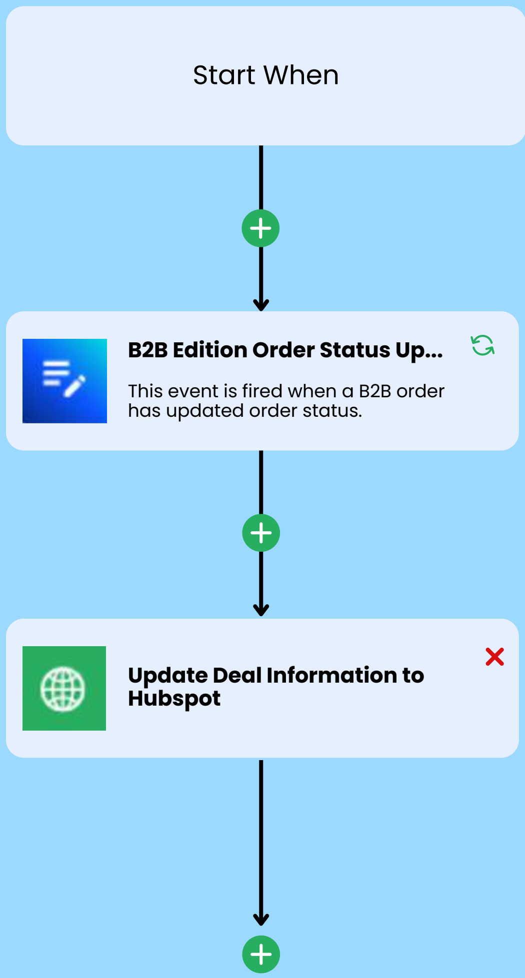
Trigger

- Order placed

Action

- Update deal (HTTP Request or integrate with CRM) (*)

(*) Contact ConnectPOS for support.



Create B2B Invoice Notify Internal Team & Buyers

- **Use case description:** Once a B2B invoice is generated, it will be shared with the internal team and sent to the buyers for their reference.

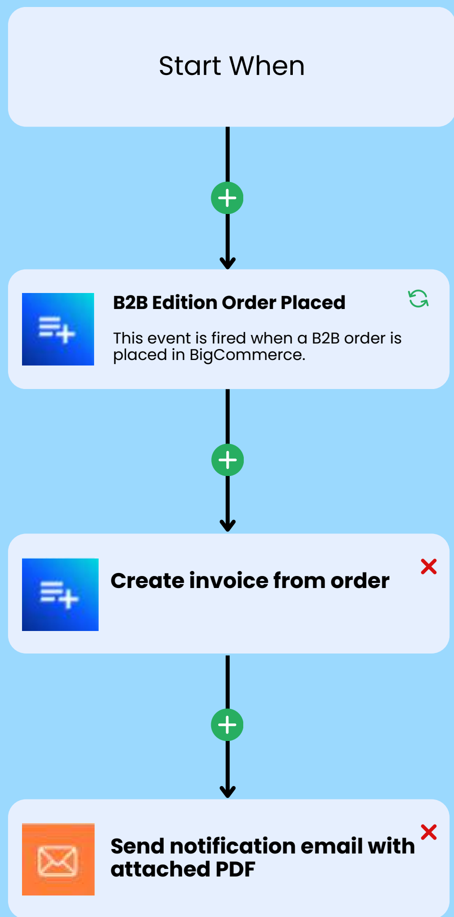
Trigger

- Order placed

Action

- Create invoice (HTTP Request or integrate with CRM) (*)

(*) Contact ConnectPOS for support.



Add Company Credit for B2B Orders

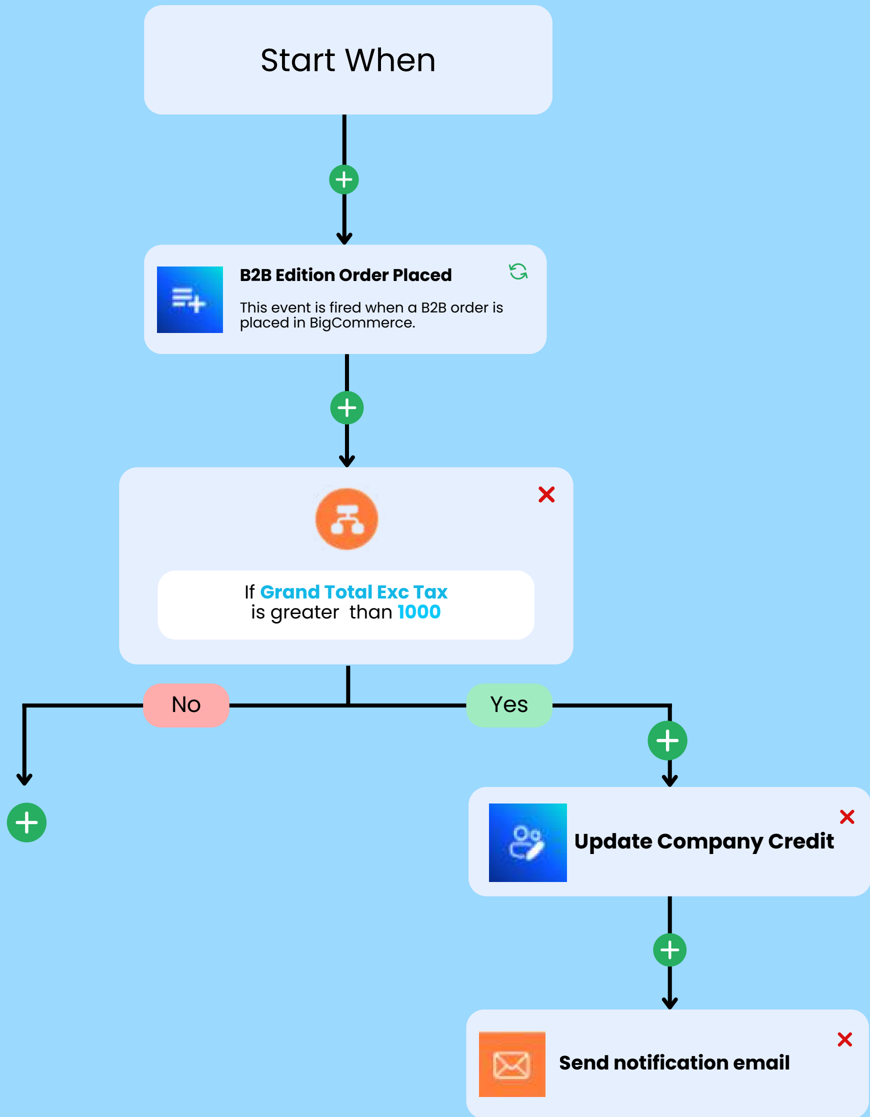
- **Use case description:** When an order is placed, the system will automatically allocate company credit to the buyer's account as a loyalty incentive. This rewards repeat purchases and strengthens customer retention.

Trigger

- Order placed

Action

- Update company credit
- Send notification email to buyer



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THANKS

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