



Stock in the Channel

Module 3: Working with Customer Groups

Modern Selling How-To Guides

Intro

This Guide explains how to use Modern Selling B2B ecommerce features to give every customer an individual experience of your webstore; helping you to manage your sales more effectively.

Working with Customer Groups features allows you to change the products and prices that are shown to specific customers based on your own preferences.

You can also set Distributor Rules to direct business to preferred suppliers, based on your own relationships.

The importance of Customer Groups helps unlock the full potential of your webstore.



SINCH How-To Guides

Module 1: Getting Started with SINCH

Module 2: Creating Accounts & Contacts

Module 3: Working with Customer Groups

Module 4: Using the Quote Tool

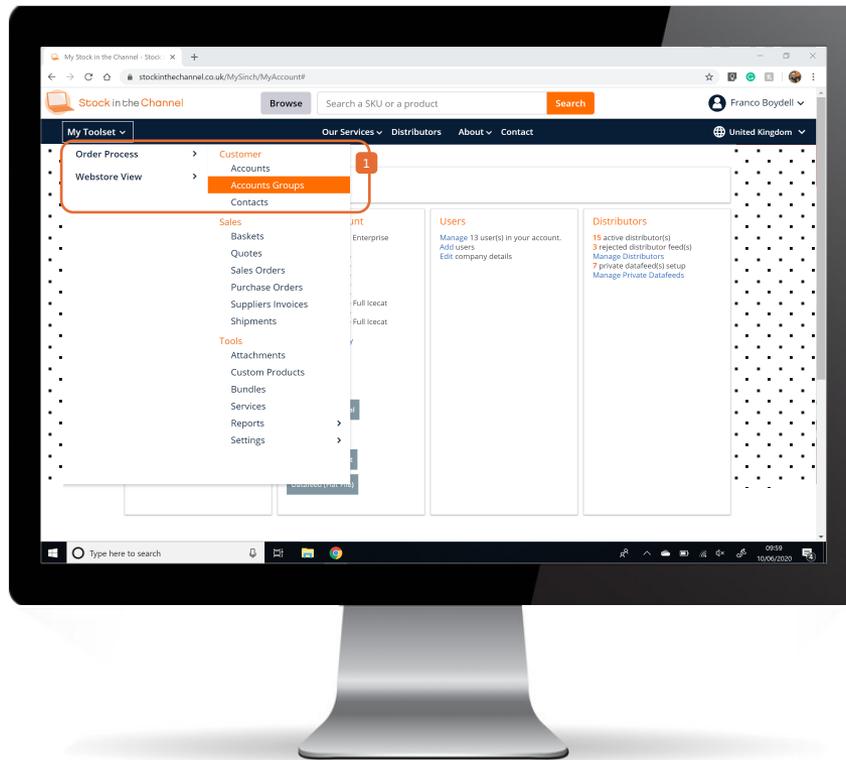
Module 5: Completing Purchase Orders

Module 6: Working With Magento Modules

Settings & Configurations Guide



Step 1

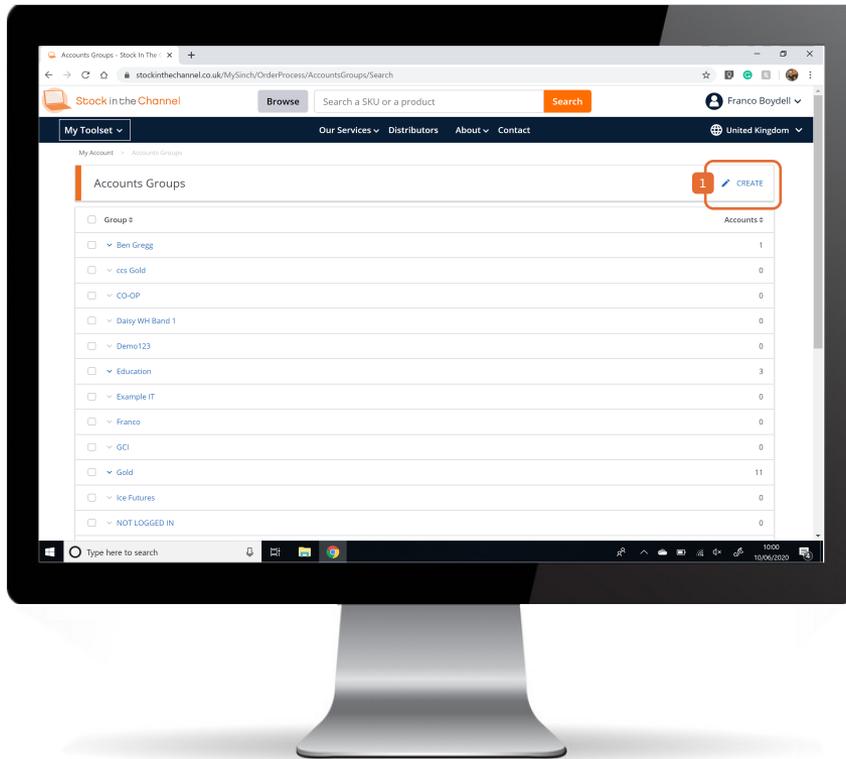


Log in to your Stock In The Channel account.

- 1 In the top left corner, click My Toolset, then Order Process and select Accounts Groups.

NB. If you are not an Order Process customer please skip to Step 4.

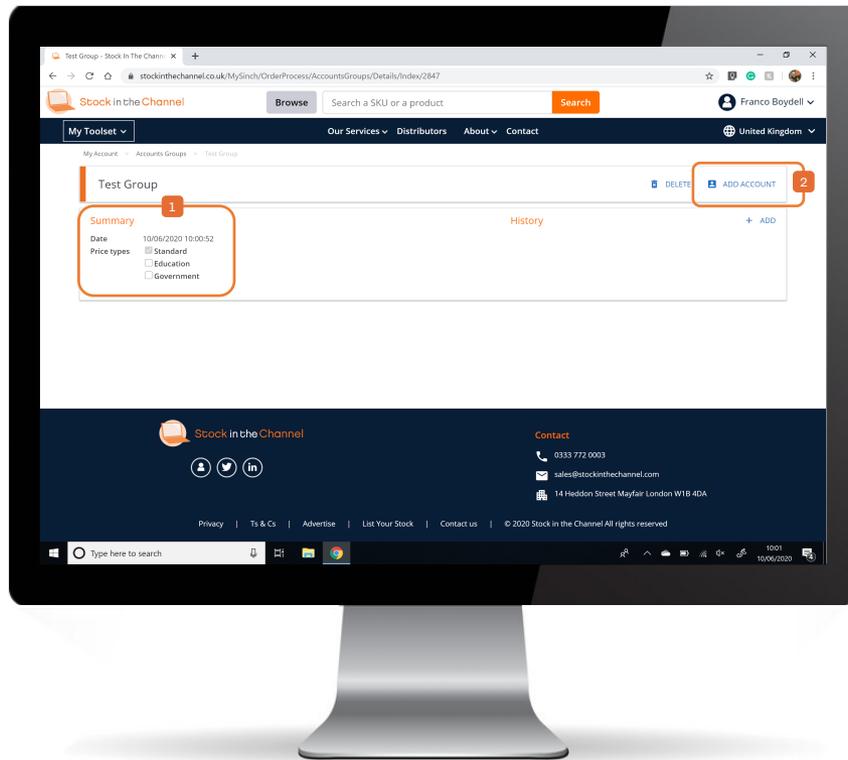
Step 2



- 1 To create a new Customer Group; click CREATE and input the group name.

NB. It is also possible to add Groups on other pages in the Webstore View.

Step 3



- 1 Select the type of Group you're adding.

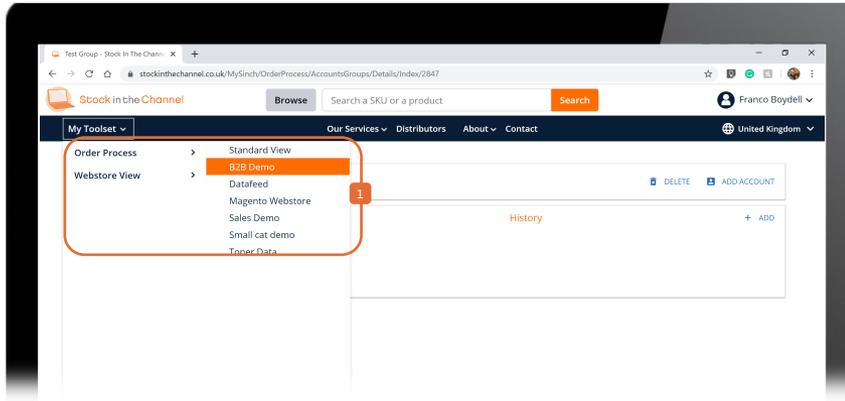
To assign an Account to this Group click

- 2 ADD ACCOUNT.

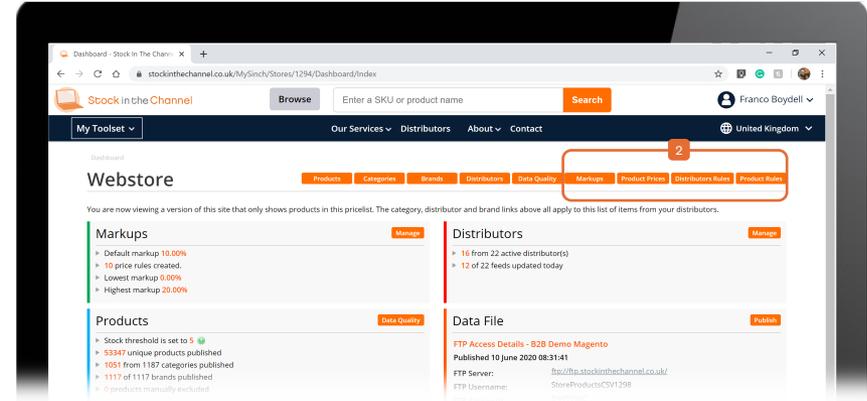
Accounts can also be assigned to a Group within the Account pages, as demonstrated in [Module 2: Creating Accounts & Contacts](#).

Once the Group has been created, you need to move into the Webstore View to create and define the rules.

Step 4



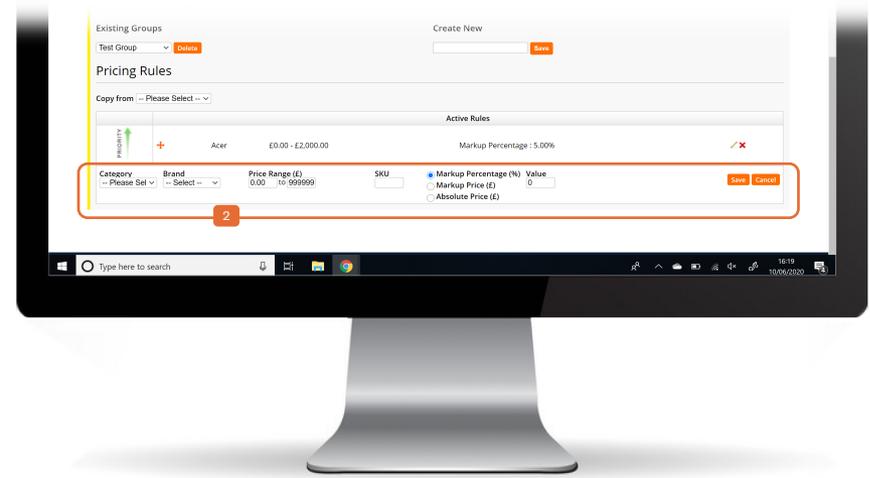
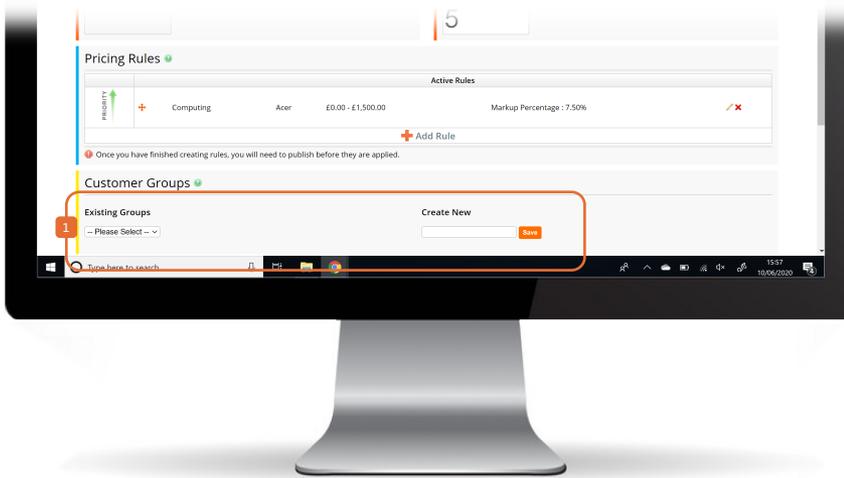
- 1 In the top left corner, click My Toolset, then Webstore View and select your webstore.



- 2 These navigation tabs allow you to set the full spectrum of rules:

Markups
Product Prices
Distributor Rules
Product Rules

Step 5



Choose the **Markups** tab.

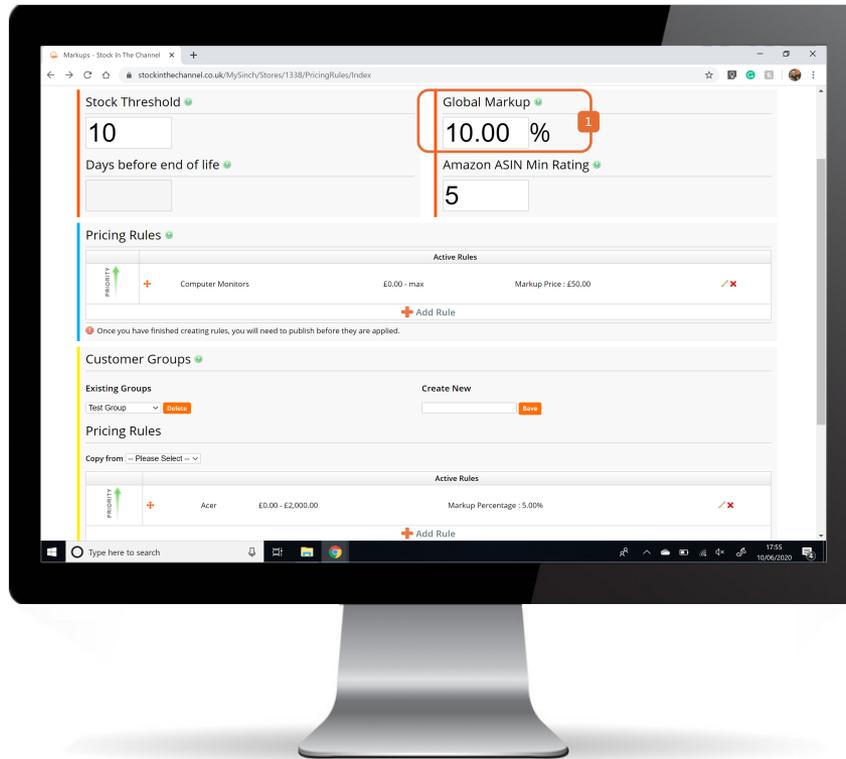
At the bottom of the page, select a previously created **Customer Group** (or create a new one).

- 1
 - 2
- Create the Pricing Rules for this customer by Category, Brand, Price Range or SKU.

Example: Any **Account** in this **Group** will get a 5% markup if they purchase Acer products up to £2,000.

NB. To price a defined list of multiple SKUs in a specific way please see **Step 7**.

Step 6

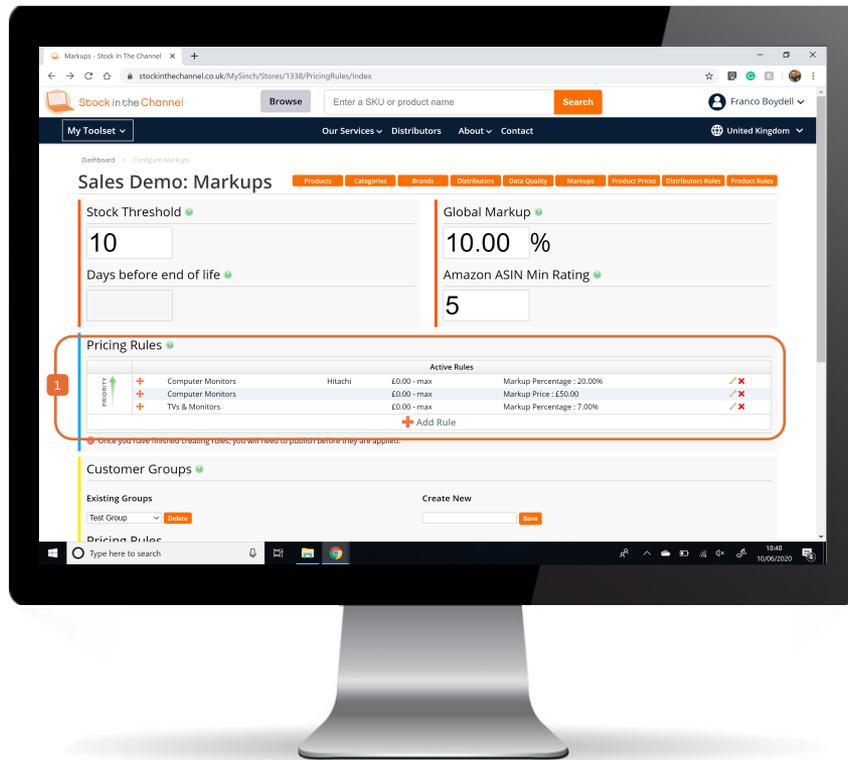


- 1 The Global Markup applies to any Customer Group, Category, Brand or SKU that does not have a specific rule.

Any products not covered by Customer Groups pricing will instead use pricing from the default Pricing Rules and Global Markup.

NB. Pricing Rules are explained on the following page.

Extra: Pricing Rules



- 1 Pricing Rules are set in order of execution. You can drag and drop each Rule up or down to set the priority order.

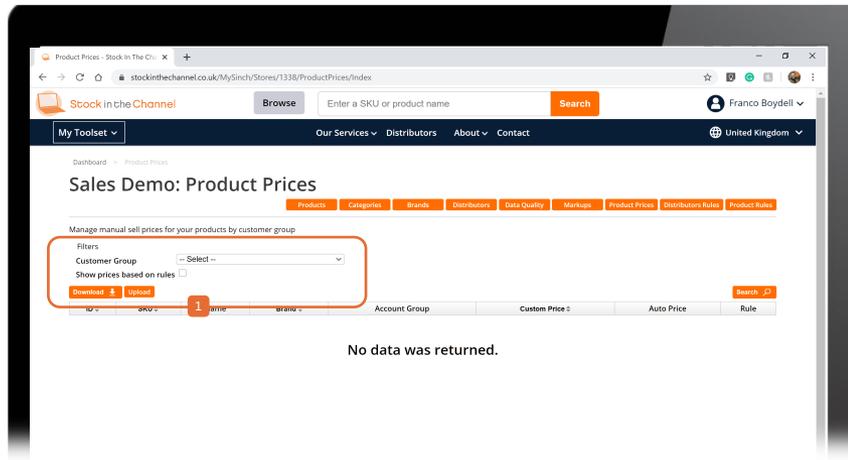
More specific Rules should be placed further up the Priority list.

Example: Computer Monitors from Hitachi get a 20% markup.

Any other Computer Monitors would receive a blanket £50 markup.

Any other TVs & Monitors receive a general 7% markup.

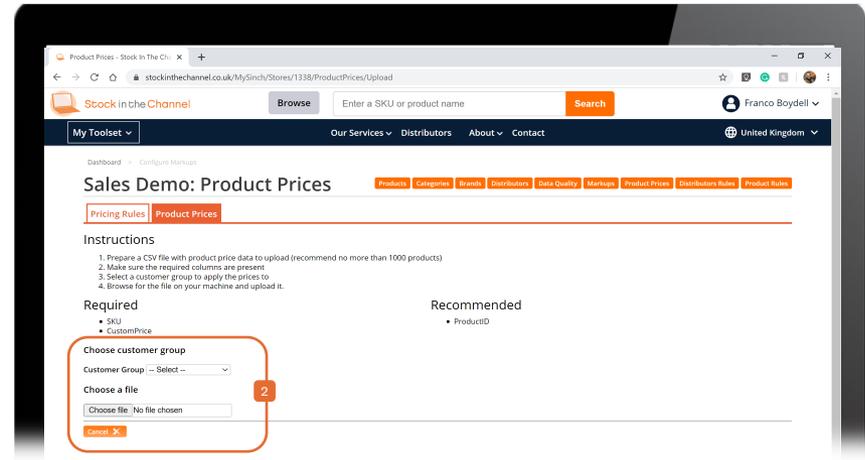
Step 7



Choose the Product Prices tab to upload absolute sale prices for lists of products.

This list of prices will override any Markups that have been made or added in the future.

- 1 This is a great way to maintain fixed rates for certain products for specific Groups.



- 2 Select a Customer Group and click Upload.

Upload your list of products and prices as a .CSV file.

NB. You must ensure that the required columns are completed otherwise they will not appear.

Step 8

ID	SKU	Name	Brand	Account Group	Custom Price	Auto Price
55020962	DS-2CE71H07-PIRLO-2-8MM	DS-2CE71H07-PIRLO	Hikvision Digital Technology	Franco	£28.93	£29.93
55022493	DS-2CD2345SPWD-I2-8MM	DS-2CD2345SPWD-I	Hikvision Digital Technology	Franco	£77.86	£78.86
55046789	LTL0CKNBL	Laptop Cable Lock - 4-Digit Combination Lock for Wedge-Type Slot	StarTech.com	Franco	£21.91	£22.91
55000991	DS-KC001	DS-KC001	Hikvision Digital Technology	Franco	£180.65	£181.65
55053883	02029-001	02029-001	Axis	Franco	£129.89	£130.89
55020291	DS-2TD1217B-3/PA	DS-2TD1217B-3/PA	Hikvision Digital Technology	Franco	£2,377.25	£2,378.25
550480194	VMA1000-100005	VMA1000	Arlo	Franco	£10.19	£11.19
550479721	SWPRO-4KMSFB-UK	SWPRO-4KMSFB	Swann	Franco	£78.19	£79.19
55035807	TNO-4040T	TNO-4040T	HANWHA	Franco	£3,329.60	£3,330.60
55035282	TNO-4030T	TNO-4030T	HANWHA	Franco	£3,329.60	£3,330.60
55035730	SPC-2000	SPC-2000	HANWHA	Franco	£335.53	£336.53
55035131	HCD-6080R	HCD-6080R	HANWHA	Franco	£125.00	£126.00
55035130	HCV-6080R	HCV-6080R	HANWHA	Franco	£138.13	£139.13
55035129	HCO-6080R	HCO-6080R	HANWHA	Franco	£138.13	£139.13
55027276	LTL0CKNANO	2 m (6.6 ft.) Laptop Cable Lock - Nano-slot - Customizable Combination	StarTech.com	Franco	£26.45	£27.45

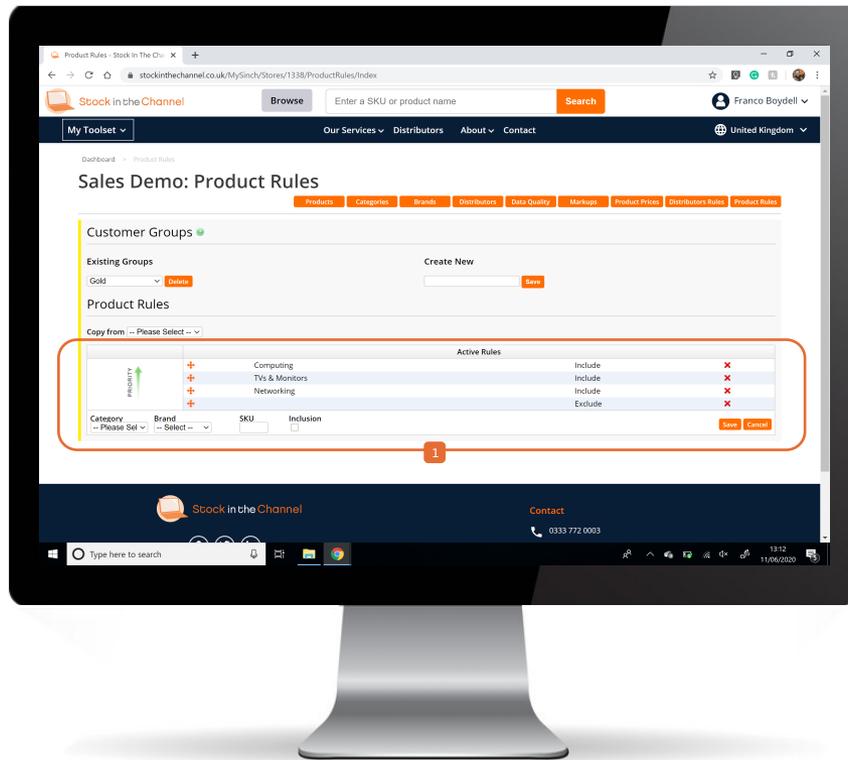
Product Prices are now visible to Search.

- 1 Custom Price is the price you have just uploaded from your file.

Auto Price is the price as calculated on the Markups page.

The Custom price will override the Auto Price for this selected Customer Group.

Step 9



Example: This Group will only see Computing, TV & Monitors and Networking, nothing else.

Choose the Product Rules tab to decide which products will be visible to specific Customer Groups on your B2B portal.

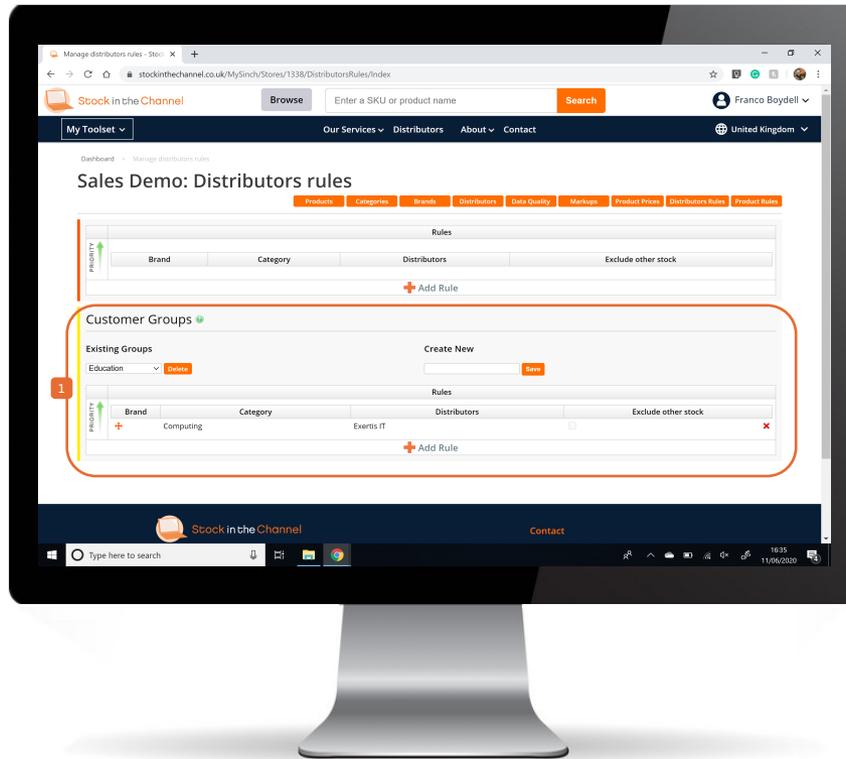
- 1 Add Rules to Include the Categories, Brands or SKUs.

NB. To Exclude types of products leave the Inclusion box unticked.

NB. If you want to display a curated collection of products, you must always Exclude everything else. This is done by creating a new Rule and leaving all options blank (see the example on the screen).

Remember to drag and drop these Rules in execution order with the most important at the top.

Step 10



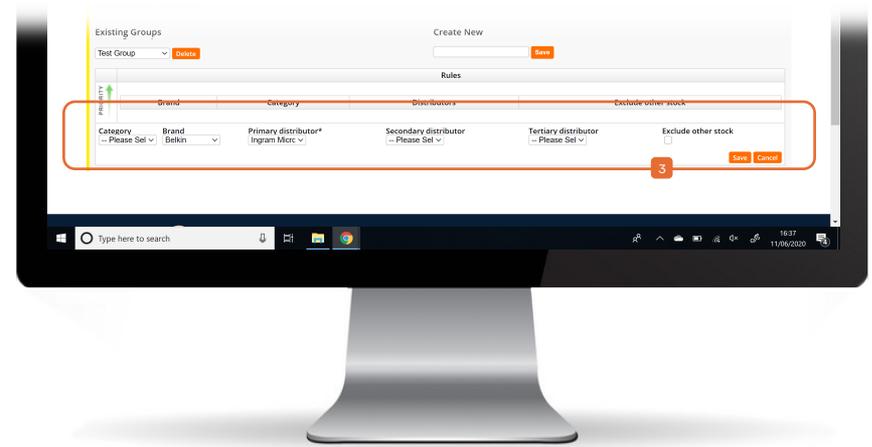
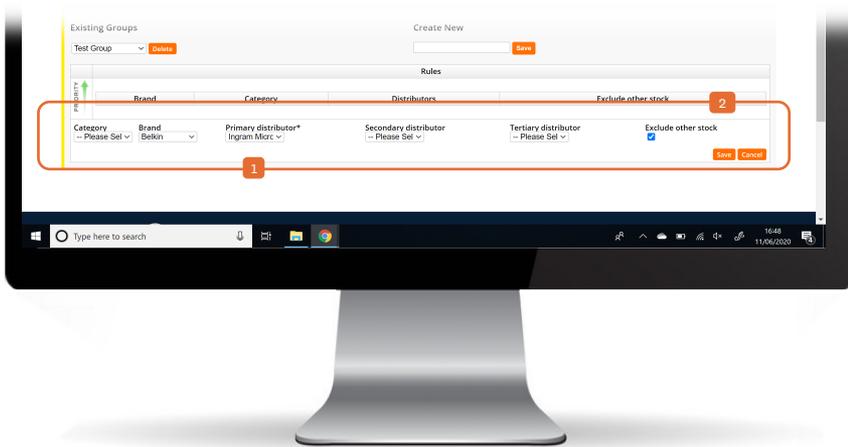
Choose the Distributors Rules tab in the navigation.

- 1 Here we can override the lowest cost price used to calculate your sales prices at a Customer Group level.

Example: You may get a rebate from certain suppliers when selling to Educational Accounts.

This Rule defines that Accounts in this Group will only be shown Computing products from Exertis IT on your B2B portal. Those product prices will be calculated using only Exertis IT prices, even if they are not the lowest cost available from your suppliers.

Step 11



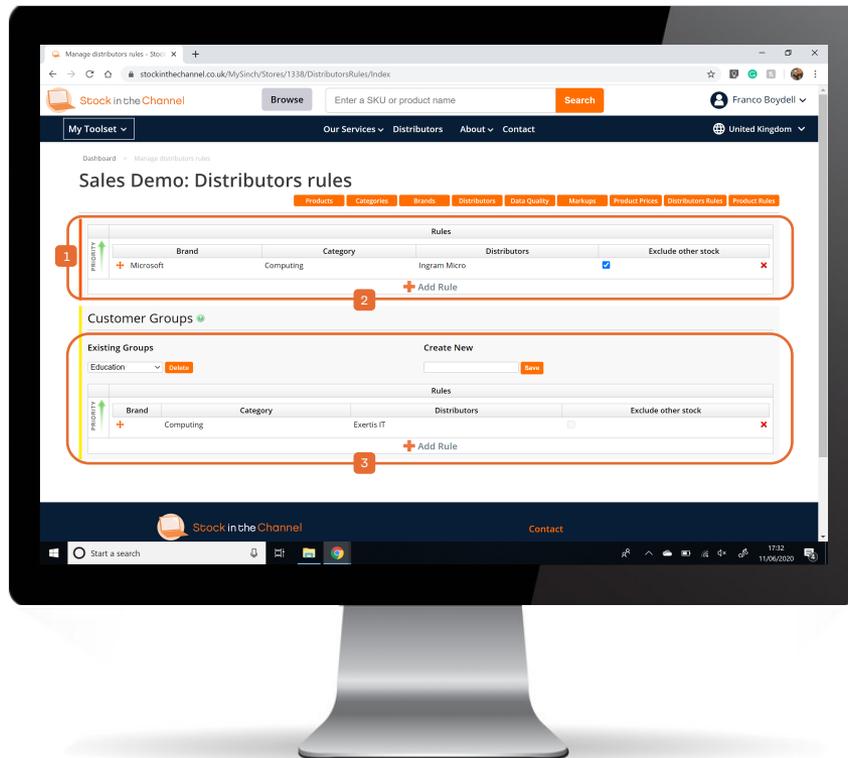
- 1 If you only want to show certain products from certain Distributors (you can choose up to 3) simply select the Primary distributor (leaving the other options blank) and click
- 2 Exclude other stock.

Example: This Group will only see Belkin products offered by Ingram Micro.

- 3 Here all Belkin products will be included. While Ingram Micro's price will be prioritised, if they do not have the item the lowest cost price from another supplier will be calculated.

Excluding other stock means you can offer a de-cluttered product range and funnel higher levels of business to your preferred distributors.

Step 12



- 1 General Distributor Rules can also be set (like the Global Markup function).

These are applied to all Accounts if they are not in a Customer Group with other more specific Rules.

- 2 Example: You have decided to drive all Microsoft business through the Distributor Ingram Micro.

- 3 But if an Educational Account wants to purchase a Microsoft Computer then the business will go to Exertis IT.

Distributor Rules can be set according to a number of factors which will be specific to your business.



Stock in the Channel

Thank you

You're now ready to move onto Module 4: Setting up your Stores Area.

If you have any further questions, please email or call your Stock In The Channel Account Manager and they will be happy to provide any additional information.

Modern Selling How-To Guides