

AffStackDev B2B — Complete Customer Reference

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Audience: Store owners, administrators, sales staff and business buyers.

About this reference

AffStackDev B2B gives a WooCommerce store business applications and approvals, account-specific terms, business prices, quotes and controlled purchasing. This reference explains its complete set of settings and workflows for store owners, administrators, sales staff and business buyers.

Use the contents and feature index to find a task, then follow its controls, requirements, results and recovery steps. The companion Master Technical Reference provides exact field, storage and integration contracts for developers and technical administrators.

What's new in 2.1.0

Release 2.1.0 follows release 2.0.8 and adds six things. **Use your own AI with B2B.** Claude, ChatGPT, Codex and other AI apps can read B2B and prepare changes through WordPress's own Abilities API and B2B's MCP address. Nothing is saved until you approve the exact values in B2B's new **AI** tab, which also holds the setup for Claude Desktop, Claude Code and Codex, the switches, the **AI activity log** with **Undo**, a chat in B2B's screens and an optional shopping assistant for business customers, all on your own AI (see [Use your own AI with B2B](#)). B2B adds no AI service or charge. **Automatic moves between groups.** On **Business groups**, a company moves from one group, or from no group, to another by itself once its paid business orders reach an amount you set, counted over all time or over the last days you choose; it can pass several groups in one check, never moves back down by itself, and an account you tick **Keep this account in its group** on stays where you put it. An optional email tells the company owner (see [Move companies to another group automatically](#)). **Pay on account.** Approved business accounts you allow can order now and pay later by invoice, with payment terms, a purchase order number and a credit limit; the new **Accounts receivable** screen lists what each company owes, records payments and sends payment reminders (see [Pay on account](#)). **Separate business stock.** A product or variation can keep a business quantity that only business customers buy from (see [Separate business stock](#)). **Messages with the store.** Business customers can message the store outside quotes, and staff can start a message with a company (see [Messages with the store](#)). **Currency switchers.** Business accounts work in the shopper's currency with WPML or FOX (see [Currency switchers](#)). Two corrections: a business customer's classic checkout of products that need no shipping is no longer refused for its empty shipping method, and with quotes on, product prices no longer show a server error to a business customer B2B cannot serve (for example in a currency it has no rate for). For developers, B2B's action and filter hooks carry WooCommerce's doc comments. Release 2.0.8 changed screens only: a tax decision published on a request's screen reports that it was saved, error messages show in red, the filter boxes of Tax exemptions and Quotes are wide enough to type in, B2B screens opened from the Suite keep their look, and every field has its own label for screen readers. The paragraphs below describe 2.0.7, 2.0.3 and the launch release 2.0.0-rc.5.3a.

Release 2.0.7 follows release 2.0.3 and includes 2.0.4 to 2.0.6. **The license is a tab of B2B.** A site administrator activates and recovers it in B2B's **License** tab; the separate Settings → B2B license page is gone and its old address opens the tab (see [Activate and recover the B2B license](#)). **Company purchases.** A buyer's **Request approval** records the request; for every cart at business prices it was refused with "The cart or company terms changed". **Order limits.** Business order limits take amounts in the store currency (250 or 249.99); the help asked for whole currency minor units. **Sales reports.** **Finish remaining batches** completes the report. Also: screens and customer pages say business group where some still said program; review before publishing names settings the way the forms do; **Catalog & quantities** lists rules by product or category name and chooses business groups by name, and **Check catalog access as a customer** answers again; the business price label sits under the price; quotes, company purchases and limit messages show amounts as your store shows money; a business order that B2B refuses in the block checkout answers as WooCommerce's own refusals do (HTTP 409) instead of as a

server error, with the same message for the buyer; and on hosts that add their own style for plain buttons (GoDaddy's site designer does), B2B's buttons for customers keep their look. The paragraphs below describe 2.0.3 and the launch release 2.0.0-rc.5.3a.

Release 2.0.3 follows the launch release 2.0.0-rc.5.3a. It repairs seven things: **Quotes → Conversations** lists your quotes on MySQL 8 databases (it showed "Business records are temporarily unavailable"); you can reply to a buyer and keep private staff notes, with files, in a quote conversation on B2B's own screen (before, **Send message** there saved nothing); an account type can use **Use business defaults** as its group; under **Update business details** an owner sees and can change the questions of their own account type when that is not the default type; staff lists show account status and catalog visibility in the screen's own words; the business portal counts saved lists correctly; and a catalog rule's **Update named choices without saving** takes the group list in either form. With WordPress debugging on, B2B no longer makes WooCommerce or WordPress log a warning when a shopper first changes the cart or when the Suite shows B2B's page. The guide built into the plugin describes the current release, and version numbers have three parts from this release on. Everything else in this section came with 2.0.0-rc.5.3a.

Release 2.0.0-rc.5.3a was the AffStackDev launch release of B2B; WordPress showed it as version 2.0.0-rc.5.3.1. It contains every change since 2.0.0-rc.5.2a.

Licensed software sells at retail to everyone. B2B recognizes every product AffStackDev License Server sells through Commerce Bridge, including free licensed products. Those products stay out of business price books and quotes; only a group's agency terms give business pricing on them. A pending applicant, or an approved business whose group has no agency terms for the chosen license configuration, buys licensed software at the ordinary store price (see [Agency license purchasing](#)).

Store credit and gift cards are payment. Business purchase limits on merchandise after coupons or on the final order total, and the account's minimum and maximum business order value, count merchandise before store credit and gift cards, so paying with credit never pushes an order under a minimum (see [Set account or group purchase limits](#)).

Company purchasing works with other AffStackDev plugins. Bookkeeping that Store Credit, Dynamic Pricing or Free Gifts & BOGO record on cart lines no longer stops a controlled company purchase; a real product option still needs its own workflow.

Checkout keeps working. While the B2B license is being checked or is held, ordinary customers still check out; business orders still need their accepted terms. A guest who creates an ordinary customer account during checkout completes the order under the new account.

Account pages. **My Account → Tax exemptions** shows its form and a saved request shows its confirmation. B2B's account pages no longer hide a site page with the same address (for example a page at /business-quotes/).

Your license and updates. Each B2B license covers one live (Production) site and one test copy of it; an installation set to Staging, Development or Local uses the license's staging place. AffStackDev Suite needs no license key of its own. Download B2B from **My Account → Downloads** on affstackdev.com; after activation, WordPress offers new releases through protected updates.

Contents

- [What's new in 2.1.0](#)

- [Feature index](#)
- [Getting B2B ready](#)
- [Finding your work](#)
- [Choosing general defaults](#)
- [Business groups and record-level choices](#)
- [Arranging your B2B workspace](#)
- [What shoppers and checkout enforce](#)
- [Connections and protected products](#)
- [Saved order evidence and payment recovery](#)
- [Downloads and retained records](#)
- [Data retention and safe removal](#)
- [Shared features supplied by compatible adapters](#)
- [Apply for and manage a business account](#)
- [Configure registration and application questions](#)
- [Update saved business details](#)
- [Reuse application details for billing](#)
- [Private documents](#)
- [Application messages](#)
- [Manage limited customer roles](#)
- [Choose catalog audiences and denied-access recovery](#)
- [Restrict selected pages and posts](#)
- [Application and access problem reference](#)
- [How business prices are chosen](#)
- [Set a general discount](#)
- [Set customer-role prices](#)
- [Create and schedule a price book](#)
- [Add product and quantity rules](#)
- [Add a separate cart discount](#)
- [Set business coupon amounts](#)
- [Customize customer pricing guidance](#)
- [Import and export price rules](#)
- [Review changes and restore a book version](#)
- [Check published prices](#)
- [Search named choices and keep a draft](#)
- [Open business prices from a WooCommerce product](#)
- [Set account or group purchase limits](#)
- [Pricing across carts, quotes and connected tools](#)

- [Currency switchers](#)
- [Recover from pricing problems](#)
- [Quotes and agreed offers](#)
- [Business sales and quote reports](#)
- [Your business portal and company role](#)
- [Company team workspace](#)
- [Shared company addresses](#)
- [Viewing company orders](#)
- [Company spending controls](#)
- [Requesting and reviewing a company purchase](#)
- [Company purchases screens and email](#)
- [Checkout, payment and recovery](#)
- [Payment and delivery permissions](#)
- [Pay on account](#)
- [Separate business stock](#)
- [Business portal and current terms](#)
- [Find products and choose quantities](#)
- [Configure the buyer order form](#)
- [Build and edit a working order list](#)
- [Paste or upload SKUs](#)
- [Review prices and add to the cart](#)
- [Save private or shared purchasing lists](#)
- [Copy your cart, a list or a previous purchase](#)
- [Export, print and reuse lists](#)
- [Customize buyer presentation](#)
- [Agency license purchasing](#)
- [Tax exemptions](#)
- [Activate and recover the B2B license](#)
- [Use your own AI with B2B](#)
- [Glossary](#)

Feature index

Capability or reference	Section
Accept and recover the same licensed order	Open reference
Accept the exact offer and check out	Open reference
Account types	Open reference

Capability or reference	Section
Activate and read your status	Open reference
Activate and recover the B2B license	Open reference
Add a separate cart discount	Open reference
Add product and quantity rules	Open reference
Add, edit and import products	Open reference
AffStackDev storefront owner shortcut	Open reference
Agency license purchasing	Open reference
Application and access problem reference	Open reference
Application messages	Open reference
Application wording and page creation	Open reference
Apply for and manage a business account	Open reference
Apply, review and send evidence	Open reference
Applying during checkout	Open reference
Approval, billing and protection options	Open reference
Approve or reject a change	Open reference
Arranging your B2B workspace	Open reference
Attach and download private files	Open reference
Brand and preview quote documents	Open reference
Browser behavior and saving edits	Open reference
Build and edit a working order list	Open reference
Build, pause and refresh a report	Open reference
Business details on orders	Open reference
Business groups and record-level choices	Open reference
Business portal and current terms	Open reference
Business sales and quote reports	Open reference
Change or remove employee access	Open reference
Changing questions and choosing answers	Open reference
Chat in B2B's screens	Open reference
Check a price and request a licensed quote	Open reference
Check published prices	Open reference
Checkout, payment and recovery	Open reference

Capability or reference	Section
Choose catalog audiences and denied-access recovery	Open reference
Choose what AI may do	Open reference
Choosing general defaults	Open reference
Claim a reusable offer	Open reference
Company purchases screens and email	Open reference
Company spending controls	Open reference
Company team workspace	Open reference
Configure a group's agency terms	Open reference
Configure application questions	Open reference
Configure quote emails and review delivery	Open reference
Configure registration and application questions	Open reference
Configure the buyer order form	Open reference
Connect Claude Desktop, Claude Code or Codex	Open reference
Connected purchasing limits	Open reference
Connected quote applications	Open reference
Connections and protected products	Open reference
Contact requirements and request questions	Open reference
Copy your cart, a list or a previous purchase	Open reference
Create and schedule a price book	Open reference
Customize buyer presentation	Open reference
Currency switchers (WPML, FOX)	Open reference
Customize customer pricing guidance	Open reference
Customize messages and inspect delivery	Open reference
Data retention and safe removal	Open reference
Downloads and retained records	Open reference
Enable quotes and choose who can request them	Open reference
Existing integration inputs	Open reference
Existing orders and interrupted checkout	Open reference
Expiry and reminders	Open reference
Export, print and reuse lists	Open reference
Find products and choose quantities	Open reference

Capability or reference	Section
Finding your work	Open reference
Follow your status	Open reference
Freeze, prepare and cancel removal	Open reference
Getting B2B ready	Open reference
Guest access and private evidence	Open reference
How business prices are chosen	Open reference
Import and export price rules	Open reference
Import verified historical prices	Open reference
Invite an employee	Open reference
Link an inquiry and control notices	Open reference
Manage limited customer roles	Open reference
Messages with the store	Open reference
Move companies to another group automatically	Open reference
Open business prices from a WooCommerce product	Open reference
Organize the staff quote desk	Open reference
Paste or upload SKUs	Open reference
Pay on account: terms, credit limit, Accounts receivable	Open reference
Payment and delivery permissions	Open reference
Price display, checkout and previous orders	Open reference
Pricing across carts, quotes and connected tools	Open reference
Private documents	Open reference
Questions and fields	Open reference
Quotes and agreed offers	Open reference
Read proposals and manage their stages	Open reference
Recover from pricing problems	Open reference
Release an activation or reconnect a moved site	Open reference
Repeated payment notifications	Open reference
Requesting and reviewing a company purchase	Open reference
Restrict selected pages and posts	Open reference
Reuse application details for billing	Open reference
Review changes and restore a book version	Open reference

Capability or reference	Section
Review delivery and the payable total	Open reference
Review prices and add to the cart	Open reference
Review quote conversion and export	Open reference
Review requests and grant an exemption	Open reference
Review the saved form	Open reference
Reviewing, publishing and leaving an editor	Open reference
Save private or shared purchasing lists	Open reference
Saved order evidence and payment recovery	Open reference
Search named choices and keep a draft	Open reference
Separate business stock	Open reference
Set a general discount	Open reference
Set account or group purchase limits	Open reference
Set business coupon amounts	Open reference
Set customer-role prices	Open reference
Set product quote buttons and hidden prices	Open reference
Set up eligibility and approval	Open reference
Shared company addresses	Open reference
Shared features supplied by compatible adapters	Open reference
Shopping assistant for business customers	Open reference
Signed plugin updates	Open reference
Staff quote setup and publishing	Open reference
Start and follow a conversation	Open reference
Store Credit and licensed checkout recovery	Open reference
Store Credit on saved quotes	Open reference
Tax exemptions	Open reference
The AI activity log	Open reference
Understand checks, deadlines and restrictions	Open reference
Understand the sales figures	Open reference
Understand VAT results	Open reference
Undo a change	Open reference
Update saved business details	Open reference

Capability or reference	Section
Use the quote basket and private workspace	Open reference
Use your own AI with B2B	Open reference
Viewing company orders	Open reference
What shoppers and checkout enforce	Open reference
What the AI can read and prepare	Open reference
With AffStackDev AI	Open reference
Work with the band rows	Open reference
Your business portal and company role	Open reference

Getting B2B ready

AffStackDev B2B adds business accounts, pricing and purchasing controls to WooCommerce. Install it on each site where you want those controls; network activation is unavailable. B2B requires WordPress 6.6 or newer, WooCommerce 9.4 or newer and 64-bit PHP 8.1 or newer. Its included Commerce Core connection layer requires WordPress 6.7 and WooCommerce 10.0 or newer, with the same PHP requirement. Use the higher requirements for a store using the included shared commerce connections.

Business changes use transactional InnoDB storage and the ordinary WordPress mysqli database connection. If setup reports unsupported storage or a database drop-in, ask the host or support team to restore a supported connection. Setup retains existing records when it cannot finish. Reopening administration with plugin-activation permission can complete the additive database setup after the underlying issue is resolved.

Activate WooCommerce and B2B, then open **WooCommerce → B2B** or the B2B product in AffStackDev Suite. Staff need WooCommerce management permission. A site administrator activates the license in B2B's **License** tab. Suite is optional: B2B keeps its own WordPress screen when Suite is missing, unavailable or inaccessible to your login.

Activation sets up the business account, buyer portal, quick-order, quote, team, purchasing and tax routes. B2B owns its business records and decisions. Commerce Core connects compatible products and preserves shared order evidence; the product supplying Core's files does not take over business accounts, prices, gifts or credit balances.

Finding your work

The overview shows **Awaiting review**, **Approved accounts** and **Accounts on hold**, followed by shortcuts to pricing, defaults, groups, applicants and product exceptions. The workspace includes all of these sections:

Section	Use it for
Overview	Account counts and common starting points.
Pricing & discounts	Everyday business pricing and related tools.
Agency licensing	The supported licensing-product business workflow.

Section	Use it for
Accounts	Existing business accounts and their reviewed terms.
Company teams	People and permissions within companies.
Purchasing	Purchase methods, approvals and limits.
Accounts receivable	Pay on account: who may use it, payment terms, credit limits, reminders, what companies owe and Record payment (Pay on account).
Business groups	Shared terms for groups of business accounts.
Product prices	Exceptions for particular products or variations.
Price books	Versioned collections of business prices.
Price preview	Review the result for a selected customer and product.
Quotes	Quote requests, offers and accepted terms.
Sales reports	Business sales and retained reporting context.
Tax exemptions	Applications and tax-exemption evidence.
Catalog & quantities	Product/category access and ordering quantities.
Applications	Application forms and review configuration.
Page access	Access rules for site content.
Setup & defaults	General store experience and default business terms.
Tools & connections	Workspace preferences, connections, downloads and removal controls.

Account and group lists support a name search. Lists show 25 records per page and provide the next page when more exist. Account details include the most recent 25 activity entries. A business account begins with a customer application; the general account screen does not create an arbitrary new account.

When the B2B license does not permit current business operations, authorized staff see **B2B records** and can still reach retained accounts, teams, quotes, reports, tax, purchasing and Tools. The records remain available, while each attempted change keeps its permission and licensing checks.

Reviewing, publishing and leaving an editor

Open the record or settings form, enter your changes and choose **Review changes**. The next screen names the values that will be published. **Back to editor** restores your unpublished entries, so you can correct them and review again. **Publish these changes** saves the reviewed operation. The example showing a base price of 100 is an illustration of the entered percentage; it is not a saved product price.

For an existing product-price or catalog rule, **Review removal** opens a review step and **Remove this rule** confirms it. Removing that rule restores inheritance at that level; another matching restriction can still apply. The Business groups screen does not offer a delete-group control.

If another administrator changes the record after you opened it, B2B asks you to reload instead of overwriting their version. Copy any unsaved text you want to keep, reopen the current record and review your change again. A validation message identifies an invalid value or missing requirement. Supported pricing, purchasing-limit,

quote and tax forms can retain the submitted draft with that message. Other native failures provide a back link; do not assume a failed submission was published.

The enhanced interface can change screens and search without a full page load. It asks before leaving unsaved changes and prevents duplicate saves. If you type more while an earlier save finishes, it can keep the newer text visible but require you to copy it and reload before another submission. A cancelled navigation does not make your editor clean, and closing the browser is not a saved draft. Ordinary page-load forms remain usable when enhancement is disabled.

Choosing general defaults

Open **Setup & defaults**. General defaults apply where a more specific supported business term does not override them. Review and publish the form after changing its values.

Control	Initial value and choices
Store experience	Retail and business customers initially: ordinary shoppers and approved businesses both buy. Business-only catalog hides the catalog from unapproved visitors; Public catalog, business prices and purchasing lets visitors browse but reserves prices and buying for approved businesses. Product/category restrictions can make access narrower.
Discount percentage	Initially 0%. Choose the general percentage, from 0 to 100, with up to four digits after the decimal point. A deliberate zero means no percentage discount.
Calculate from	Initially the regular WooCommerce price. Sale basis uses an active Woo sale price, otherwise the regular price.
Minimum business order value	Initially 0. Applies to eligible ordinary merchandise after permitted coupons, excluding tax, shipping, fees and protected licensing products. Store Credit and gift cards are payment, not coupons, and never reduce this amount.
Maximum business order value	Initially empty, meaning no extra maximum. If set, it must be at least the minimum.
Explicit business coupon codes	Initially empty. Enter one allowed code per line, up to 100 codes and 100 characters per entry. The coupon must still satisfy WooCommerce and its owner's rules.
Payment and shipping controls	Initially no additional restriction. Their purchasing-method selections and inheritance determine which methods are offered.
Use enhanced administration	Initially on. Enables the optional B2B browser interface; Suite can turn off the effective enhancement while B2B is docked.
Require a business phone number	Initially off. Makes the application's phone field compulsory.
Require a business description	Initially off. Makes the business-description field compulsory.

Use a decimal point for amounts; negative values, separators and scientific notation are not accepted. Money supports six decimal places up to 999999.999999 in the current store currency. A 15% discount changes 100 to 85. A 12.5% discount changes 19.99 to 17.49125 before WooCommerce's display and tax rounding.

If you change the store currency, review and save B2B defaults and review all exact product-price exceptions. B2B does not convert saved amounts into the new currency. It holds approved-business pricing when the

saved/store currencies disagree, or when an unsupported currency-switching result would change that identity. A form opened before the currency change must be reloaded.

Application wording and page creation

The introduction begins **Apply for a business account. We will review your details and email you when a decision is ready.** Replace it with your own required text, up to 800 characters within the server's byte limit. These required wording fields each allow up to 200 bytes:

Field	Initial wording
Business label	Business name
Business placeholder	Enter your registered business name
Contact label	Contact name
Contact placeholder	Enter your full name
Notes label	Tell us about your business
Notes placeholder	Describe your business and what you plan to purchase

Long non-ASCII text can reach the byte limit before the same number of visible characters. The final server message is authoritative if a field allows more typing than it accepts on save. More application questions, signup types and profile controls are described in [Application fields](#) and [Registration](#).

Create business signup page publishes a page called **Business account application** containing [affstackdev_b2b_application]. You need page-publishing permission as well as B2B management and an active business license. Once a stored page exists, use **Open your signup page** or **Edit page**; the button does not keep creating duplicates or replace an existing stored page. Setup also shows links and placement examples for the buyer portal [affstackdev_b2b_portal] and quick ordering [affstackdev_b2b_quick_order].

Business groups and record-level choices

Open **Business groups** to create shared terms. Give the group a name up to 200 bytes and an optional internal description up to 800 bytes. The **Tier 1** through **Tier 5**, **Dealers** and **Distributors** shortcuts fill in a name only. They do not assign a percentage, create a fixed hierarchy or limit the number of groups.

Choose inherited, custom or explicit zero percentage; inherited, regular or sale basis; purchasing methods; permitted business coupon codes; and the available quote-policy settings. Review and publish. In an account's form, select an existing group or use defaults, then review any account-specific pricing, purchasing and quote terms. Approval status and the private review note are handled through [Account approval](#). Private review notes are activity records, not the wording sent to the customer.

A **Product prices** exception can apply to all businesses using defaults, one group or one account. Select an existing ordinary simple/variable product or variation. Enter exactly one fixed price or percentage; zero is a valid intentional value. The current store currency is part of that exact price. Protected licensing products use the licensing workflow instead. Preview with an approved customer and the matching product or variation before publishing. Previewing does not save an exception or turn the staff login into the selected customer. Within the same scope, an exact variation exception takes precedence over its parent's exception. The full pricing order is described in Pricing engine.

Catalog & quantities targets a product/variation or a category. Visibility can be public, business-only, selected groups or a defined audience; price visibility can be public, business-only, hidden or audience-based; purchasing can be allowed for all, businesses, nobody or a defined audience. Quantity starts at minimum 1, unlimited maximum 0 and step 1. Use whole numbers up to seven digits; minimum and step must be positive, minimum must fit the step and a nonzero maximum must be at least the minimum.

All matching access restrictions apply. For quantity, a rule on the exact product/variation wins over its parent, then a category rule; the earlier saved rule resolves equal rank. Category rules include descendant categories. The full audience controls are described in [Catalog audiences](#).

Move companies to another group automatically

Open **Business groups**. Under the list of groups is **Automatic moves between groups**. Each line moves a company from one group, or from **No group (business defaults)**, to another group once the company has spent at least the amount you enter, counted over **All time** or over **The last days** you enter in **Days** (1 to 3,650). For example: No group → Tier 1 at 1,000; Tier 1 → Tier 2 at 10,000; Tier 2 → Tier 3 at 25,000 in the last 365 days. Up to 50 moves can be saved. Amounts are in the store currency, with a decimal point and no thousands separator (10000 or 2500.50).

What counts as spent. The paid business orders (Processing and Completed) of every member of the company, each order's products after discounts, without tax, shipping and fees. Store credit and gift cards used to pay count as money paid. Refunds lower the amount: refunded products, and refunds of an amount that name no product; refunded shipping, fees and tax never counted. A cancelled or fully refunded order counts nothing, and so does an order that is not paid yet (On hold, Pending payment). Only orders in the store currency count, and only the orders B2B recorded as the company's business orders (orders a customer placed before their business account was approved are retail orders). B2B reads up to the company's 5,000 most recent business orders.

How a company moves. The moves are checked from the top. When a company has reached a move's amount from the group it is in, it moves, and the check carries on from the new group, so a company that has already spent 30,000 moves from No group to Tier 3 in one check. Nothing moves a company back down by itself; to move one down, change its group on its account. When you publish, B2B refuses moves that go round in a loop (Tier 2 → Tier 1 together with Tier 1 → Tier 2), because the company would change group on every check.

When it is checked. A few seconds after one of the company's business orders is paid, refunded or cancelled, B2B checks that company in the background (WordPress's scheduled tasks run the check; where WP-Cron is switched off, the server's own cron does). After you publish the moves, and once a day, every approved account is checked, 25 at a time. **Check all accounts now** starts that check at once; the card then shows when the last check finished, how many accounts it checked and how many moved. Only approved accounts move. B2B's license must be active: while it is not, nothing moves, and the next check catches up.

Keep an account where you put it. Tick **Keep this account in its group** on the account's form (Accounts → the account). Automatic moves then skip that account until you untick it.

What you see. Each move is written in the account's **Recent account activity**, for example "Moved from Tier 1 to Tier 2 by automatic move 2: spent at least \$10,000.00 (all time) · automatic". The new group's terms apply at once; carts in progress recheck their prices.

Email to the company owner. Tick **Tell the company owner when their account moves** to send one email per move to the address of the account owner's login. You write the subject and the text; {business} and {group} are replaced by the company's name and the new group's name, and a link to their business account is added below

the text. The email is off at the start. Whether your mail system accepted each email is shown in the account's activity.

Changing the moves. Fill in the last line to add a move, then **Review changes**: the review lists the moves in words, in the order they are checked, and **Publish these changes** saves them (**Back to editor** keeps what you typed). Change the **Order** numbers to change which move is checked first, untick **On** to keep a move without using it, and tick **Remove** to delete it. If the store currency changes, no account moves until you review the amounts and publish them again; the card says so.

Arranging your B2B workspace

Open **Tools & connections** → **Your B2B workspace**. Under **Open B2B**, choose **Inside AffStackDev Suite when available** or **In its own WordPress screen**. The Suite option is the initial setting. Select **Review workspace changes**, check the named destination and navigation choices, then **Apply workspace changes**. The page reloads into that presentation. **Back to editor** retains your choices; **Cancel and return to B2B tools** saves nothing.

The standalone choice still lets Suite discover B2B, but opening it uses its own WordPress page and a full-load prompt. If Suite disappears or cannot serve your login, use **WooCommerce** → **B2B** or **Open the native B2B tools screen**. When Suite becomes usable again, your saved placement still applies. Standalone presentation uses B2B's local enhancement setting; docked presentation also follows Suite's global enhanced-interface policy.

Hide from workspace navigation can hide Agency licensing, Company teams, Purchasing, Accounts receivable, Price books, Quotes, Sales reports, Tax exemptions, Catalog & quantities, Applications and Page access. They begin visible. Accounts, everyday pricing, setup and Tools remain available. **All workspace sections** in Tools lists every optional section and whether it is hidden. Open a hidden section there or turn it back on; an already open hidden section remains usable.

These preferences apply site-wide to the B2B workspace. Hiding a section leaves its feature, permissions, customer routes and saved rules active. Use that feature's own settings to stop new requests or change policy. Workspace publication advances the shared settings revision, so a buyer with an in-progress cart, quote checkout or purchasing draft may need to refresh and review again. A stale or incomplete workspace form cannot silently replace a newer complete choice.

What shoppers and checkout enforce

B2B uses current account, membership, group and settings information to decide what a shopper may see and buy. Pending applications and unfinished business signup are excluded from consumer promotions but do not receive approved-business purchasing permission. Approved businesses are excluded from retail promotions even when their business discount is 0%. Suspended businesses remain excluded and cannot order. Rejected or withdrawn applications can return to ordinary consumer eligibility, subject to the promotion owner's rules.

Removing a user's site access restricts the company connection. Removing the owner suspends the account; removing another member removes that membership and invalidates current business terms. Existing company records and order history remain. An inconsistent membership or missing group produces an unavailable decision rather than granting access.

Restrictions apply to classic product pages, variations, WooCommerce product blocks, product queries and Store API output. Hidden prices are also removed from structured product data. Public product feeds do not publish a signed-in customer's private terms. Access-denied product pages use the configured message/link or redirect. A service failure can temporarily hold the product response until its permissions are available.

The cart combines quantities for duplicate ordinary product/variation lines when checking minimum, maximum and step. Removing a line with quantity zero remains possible. Protected licensing lines retain their own quantity and pricing workflow. Payment and shipping methods are filtered for the current policy and checked again when submitted.

Changing an account, group, product exception, price book or settings can make a previously calculated cart stale. Refresh it, let WooCommerce recalculate and review the total again. B2B does not silently keep an old business price after permission disappears. If another pricing component has changed a price that B2B had installed, checkout asks for fresh review instead of overwriting that competing amount. Minimum/maximum business order values use ordinary merchandise after permitted coupons, without tax, shipping, fees or protected licensing lines.

Business coupon codes are explicit policy choices. Compatible Store Credit instruments are recognized separately, but the credit owner still decides whether the shopper may spend them. An approved or suspended business status never authorizes a credit balance by itself. Consumer-promotion cleanup, quote credit reservation and settled-order acknowledgement are separate connections.

Connections and protected products

Open **Tools & connections** and read each operation's status and next step. The report separates the B2B provider, Dynamic Pricing cleanup, Free Gifts & BOGO cleanup, Store Credit cleanup, quote credit reservation, settled-quote acknowledgement and pricing/credit policy. **Connection found** means the required current interface is present. **Needs attention** means that operation has a specific hold; another credit or promotion operation can have a different result.

A missing or conflicting audience owner holds affected shared decisions. Restore the compatible owner/adaptor named by the report. If two Core copies have the same version but different files, update the affected products to a matching distribution. If the platform is too old for the included Core, meet its WordPress/WooCommerce/PHP requirements. Removing the currently selected host does not delete records, but another compatible Core host must remain for features that require it.

Dynamic Pricing owns retail discounts, Free Gifts & BOGO owns gifts and its cleanup, Store Credit owns balances and financial records, and Commerce Bridge owns licensing protection. Their adapters must recognize business exclusions and remove only their own uncommitted retail effects. Registering a plugin name does not let B2B change another product's ledger. A compatible declaration supplies exact supported contracts locally; there is no merchant checkbox that grants an unsupported integration.

B2B leaves protected licensing products with their owner workflow. It does not reprice them, assign ordinary B2B quantity rules or replace their line identity. If a previously required protection reader disappears, the affected operation stays held until the supported reader returns. The detailed contracts are in Companion consumers and Protected products.

Saved order evidence and payment recovery

For supported Core checkout, B2B accepts the reviewed business terms and Core separately records the shared order context. The accepted record includes the buyer classification and eligibility that applied to that order. Changing the customer's current account, refunding an order or removing a provider does not rewrite that historical decision. An old saved audience without a committed Core record cannot authorize a new delayed reward. The reward owner still checks payment, reversals and its own duplicate prevention.

If checkout says the business terms changed, refresh checkout and review the new total before payment. If it says the accepted order record could not be confirmed, contact the store about the existing order before trying payment again. An interrupted publication is retained for review; it does not automatically expire into permission to write the order again. Authorized technical recovery can finish an already exact stored projection without repeating the original write.

Duplicate products, gifts, quantities, totals, taxes, payment method and shared line identity all form part of the accepted order comparison. Importing an order or copying an old metadata field does not create a new accepted receipt. Staff and integrations can read accepted history, but those records are not a new payment authorization. See Accepted receipts for the exact lifecycle.

Store Credit on saved quotes

A quote using Store Credit needs the supported shared reservation connection and the credit owner's original reservation receipt. B2B checks that receipt again before payment. If the receipt is missing or changed, opening another cart or deleting metadata does not make it safe to pay; reopen the saved quote or contact the store. If the connection is unavailable before acceptance, the customer can remove Store Credit and review the resulting quote total.

A quote already in processing or completed status has a separate acknowledgement path for its recorded credit settlement. It verifies the exact original order, credit accounts, coupon usage and reserve/redeem records. It does not spend credit again or authorize another payment. When that acknowledgement fails, review the existing order with support rather than repeating the purchase.

The supported licensed quote route can also preserve the credit owner's explicit proof that the original calculation used zero credit. Missing credit metadata is not such proof. If the original unused-credit calculation cannot be verified, reopen the saved quote or ask the store to review it. The exact reservation, settlement and zero-allocation interfaces are documented in Quote credit contracts.

Downloads and retained records

In **Tools & connections**, download diagnostics when you need the current platform, presentation and connection details. That report does not include the full contents of customer accounts. Record downloads are separate and require WooCommerce management permission. They remain available when the business license is held.

Select a record type and export after the displayed starting ID. Each JSON page contains up to 500 records. When `has_more` is true, use `next_after_id` for the next download; retain every page needed for the dataset. The available types cover accounts/members/groups, settings, product prices and catalog rules, activity, receipts/report context, saved lists, application documents, price books/versions, quotes/versions/messages/files/conversions/offers/notices, company invitations/addresses/orders, purchasing policies/requests/spend, licensing evidence, tax applications/files/events/notices, and signup intents. These files support inspection and retention; Tools does not provide a general re-import button.

Application-document and quote-file exports contain file metadata, not file bodies. Tax-file export includes the stored file payload. Use the owning application/quote download action for an individual document. Quote exports omit the guest secret seed and invitation exports omit token hashes. Customer/document exports should be handled as the records they contain.

With compatible Suite, **Suite Settings → Commerce Core → Shared records and technical details** shows Foundation, audience connection, order records, providers and shared feature owners. **Download status report** exports its status and last bounded diagnostic codes. Enter an existing positive **Order ID** and choose **Download order record** to retrieve that Core journal record, including an interrupted record for authorized review. An absent Core record produces a message rather than inventing history. B2B alone does not create a separate Commerce Core menu; its own Tools provides B2B's connection summary.

Data retention and safe removal

B2B keeps its own site-specific business tables, settings, memberships, file evidence, activity and order context. Changes are revision-checked so simultaneous editors cannot silently replace each other's work. Business writes are serialized on the original database connection. If that connection is interrupted or a commit cannot be confirmed, B2B stops further changes in that request. Reload and inspect the saved record before retrying; an uncertain response is not proof that nothing reached the database.

Deactivation and uninstall stop B2B's scheduled license, quick-order, quote-notice and tax-notice workers but retain business data, queues, installation identity and order evidence. Removing the plugin files is not a record purge, a business-policy migration or a release of an existing retirement freeze. There is no generic bulk erase control in Tools.

Freeze, prepare and cancel removal

Open **Tools & connections → Removing B2B. Freeze and prepare removal** appears only when the inventory can prove that no retained business policy or records need the B2B owner. Ordinary account, quote, purchasing, tax, price/history or other business records can prevent this proof even when a rule has been disabled. Nondefault business settings and unfinished signup intents also require review. Presentation choices, basic application wording and activity alone are treated differently from live business policy.

Preparing freezes new applications and business changes, then prepares two removal scopes. No records are deleted and no price/customer group moves to another product. After the panel confirms both scopes were prepared, deactivate B2B and use the compatible **Suite Settings** audience-retirement action within five minutes. Protected-line retirement requires its own supported manager; the audience action does not bypass protected order history.

To continue using B2B, reactivate it if needed and choose **Cancel retirement** in B2B's own Tools. B2B confirms cancellation of both scope records before releasing its business-write freeze. The business license must also permit new operations. A cancelled Suite audience proof, expired preparation, plugin reactivation or generic error does not by itself release B2B's freeze.

If preparation or cancellation cannot be confirmed, reload Tools and read the saved state. Restore compatible retirement services and follow the hold's next step; contact support if it remains unavailable. Do not delete retirement records or alter the freeze marker to force a resume. The workflow is for an empty policy, not for transferring existing company and order history. Details are in Retirement contracts.

Shared features supplied by compatible adapters

Core can retain a shared feature definition and assign it only to a registered adapter that supports that complete definition. This facility is available to compatible integrations through local PHP APIs. B2B's ordinary business pricing and accounts do not become shared takeover features merely because Core is installed.

A shared definition can be enabled, paused or archived, and can prefer a supported owner. If no owner is available, Core keeps the definition and pauses its use. Its status shows the last assignment; an operation still checks permission and availability again. Changes to a definition cannot overtake a pending operation.

A repeated operation keeps one stable reference. Confirmed completion returns its saved result instead of repeating the effect. An unknown result remains held for reconciliation; time passing does not prove that a money operation failed. A supported explicit retry requires fresh proof that the previous attempt was not applied and retains the old attempt's evidence. These are integration-owned recovery tools, not a B2B merchant control for replaying payments. See Shared features and Operation journal.

Apply for and manage a business account

A business account connects your login to the store's business approval, pricing group and purchasing tools. Your application type describes the business arrangement you are applying for. The store decides approval and the associated terms. Company-team permissions are managed separately; inviting a colleague does not make that person the application owner.

Open **My Account → Business account**, or the store's dedicated signup page. A new visitor sees **Create an account**. Enter your email, choose **Customer** for ordinary personal shopping or an available business type, and complete the questions shown for that type. The Customer option follows the store's normal WooCommerce registration. A business option submits a business application as well as creating your login. Username/password requirements follow the store's registration settings; when passwords are generated, the form explains that a password-setting link will be emailed.

For an existing login, sign in and open Business account. Your login email is displayed read-only. Enter the required business and contact names, business phone and notes where requested, and the additional questions. Select **Submit business application**. A new business login and its application are saved together. A failed business application does not quietly create a separate retail account. If the page says your account and application are already saved, sign in and check that account before trying to register again.

Names accept up to 200 bytes each, standard phone 100 and notes 2000. Extra short answers accept 200 bytes and long answers 2000. Byte limits can be reached sooner by accented characters or other multibyte text. Your answers as a whole are limited to 128 KiB. Correct the named field if the form rejects a value. Your password and selected file cannot be restored into a refreshed form; enter/select them again when required. Text retained on an error page is not a separately saved application draft.

Changing questions and choosing answers

The questions depend on the selected business type and earlier answers. With interactive forms, changing a choice updates the relevant questions. Without that enhancement, select **Update questions** after choosing a type or changing an answer, complete the refreshed questions, and select private files last. Update questions does not submit an application. A required question must be completed when it is shown; a required Checkbox or Terms consent must be checked.

Control	How to use it
Short answer / Long answer	Enter plain text; long answers preserve line breaks.
Email / Phone	Supply the requested address/number. Email must be valid; the phone field accepts text suitable for an international number.

Control	How to use it
Website URL	Use a complete address starting with http:// or https://.
Number	Up to 15 whole digits and 8 decimal places, optionally negative; do not use an exponent or a leading plus.
Choose one / Radio choices	Select one listed choice. A placeholder is not a completed answer.
Choose several	Select all relevant choices. Use Ctrl/Command with a mouse, or Shift and arrow keys with the keyboard. The form supports up to 30 choices.
Checkbox / Terms consent	Check only when the statement applies or you agree. Terms consent is not preselected.
Country	Choose the country from the store's WooCommerce country list.
Date / Time / Date and time	Supply a real date and a local 24-hour time as requested; no timezone conversion is applied to this answer.
Color	Enter a six-digit value such as #006be6, or use the adjacent color picker. An optional empty answer can remain empty.
Heading / Description	Read the instructions; these are not questions to submit.
Private document	Select one PDF, JPEG or PNG for that field, up to 2 MiB. See Private documents .

A suggested Starting answer is an editable answer; a placeholder is only an example. Hidden questions are not submitted as current application answers. A conditional question can depend on one earlier choice/consent: for example, an Installation area question can appear when Services includes Installation. Changing an earlier answer may hide a dependent question until the condition applies again.

If the form says the questions changed, reload and review the current form before submitting. This can follow a change to the store's application setup, not just visible question wording. A form verification may expire after an hour. Refresh it, complete any displayed arithmetic question and respect the minimum form time. The store also limits repeated application attempts; a limit message means wait before retrying or sign in if you already created your account.

Follow your status

Status shown	What it means and what to do
Awaiting review	The store has the application. Wait for its decision or update allowed business details.
Approved	Open the business portal or build a quick order; your current business group and purchasing permissions determine available terms.
Not approved — you may update and resubmit	Review the stored information, complete the current application and submit again.
Account on hold — please contact the store	Contact the store about access. Allowed profile details can still be updated, but this is not a new application.
Application withdrawn	You can complete and submit a new application from Business account.

A rejected or withdrawn application can be resubmitted by its owner. Reselect every document that should belong to the replacement application; old document originals are replaced. Pending, approved and on-hold applications are not resubmitted through that form. Ask the store if you need a status decision or withdrawal; the owner page does not offer a standalone withdrawal button.

Approved accounts show the current business group and **Open business portal / Build a quick order**. An invited team member sees the company status and **Open company team**, while the owner manages the application, private evidence and billing reuse. If business functions are temporarily unavailable because of licensing, an existing owner can still read their retained account status, visible answers and authorized documents; contact the store to restore editing/purchasing access.

Applying during checkout

When offered at Classic checkout, choose the business account type under **Your account type**, using the billing email above. Select **Create an account** if that checkbox is shown, and complete the application. (Choosing **Customer** and creating an ordinary account at checkout simply places the order under the new account.) After it is saved, the current order attempt stops and the page explicitly says **No order has been placed**. Review your status and the refreshed checkout before placing an order, even if your type is approved automatically. Sign in first if the store does not automatically log in new accounts.

Use the separate business signup page before checkout if your application requires a document, interactive forms are unavailable, or checkout directs you there. Checkout Blocks provides an application-page link instead of the full questionnaire. A business application does not itself place an order or charge a payment.

Configure registration and application questions

Open **B2B → Applications**. Work through **Account types → Questions & fields → Approval & billing → Messages → Customer preview → Customer roles**. Each settings change goes through **Review changes** and **Publish these changes**. Review is a chance to inspect the proposed result; it does not publish by itself. Return to editing to correct it. If another administrator changed the settings, reload and review the latest values before publishing.

Account types

Choose **Add a business account type**, or open an existing type. Use a stable lowercase key starting with a letter, followed by letters, numbers or underscores, up to 40 characters. The key cannot be renamed after creation; Customer is reserved for ordinary registration. Set the Customer-facing name, help description and **Accept applications for this type**. The name allows 120 bytes and description 500. You can configure up to 20 business types. Disabling a type stops new applications; it retains existing accounts, pending submissions, question references and historical labels.

Under **After a valid application**, choose **Review each application** or **Approve valid applications automatically**. Automatic approval follows successful server validation of the questions; uploaded evidence is not automatically authenticated or treated as tax exemption. Choose the business group that supplies approved terms, or keep **Use business defaults** to give approved accounts of this type the business defaults.

Customer role on approval is optional and offers only limited customer roles. Keep existing customer roles leaves independent role assignments intact. Changing or clearing this mapping needs permission to manage WordPress user roles. Application type, business group, customer role and company-team role are separate.

Updating a type does not bulk-reassign existing approved accounts. At an account's later approval review, the current mapping is checked again; a removed group or changed role must be resolved before approval.

Questions and fields

Use **Find a question** to search labels or keys; results are 25 per page. Choose **Add a question** or open a listed question. Business type, Document, Address and Country examples only fill a draft for you to adapt. They do not publish sample data.

Setting	Effect
Field key	Stable lowercase name beginning with a letter, up to 40 characters; cannot be renamed after creation.
Answer type	Choose one of the 19 controls in the answer guide .
Question label	Required wording shown to the buyer, up to 120 bytes.
Example / placeholder	Up to 200 bytes of hint text; it is never stored as the buyer's answer.
Help below the question	Instructions up to 500 bytes.
Require an answer when shown	Requires a value only while the question applies.
Show this question on new applications	Disable to hide it and its dependents while retaining submitted answers.
Display order	Whole number 0–10000, lowest first. Questions with equal values keep their relative order. Place a conditional question after its parent.
Who sees this question?	All business types, or select at least one listed type. Customer registration does not show business questions.
Choices, one per line	1–30 distinct choices for Choose one, Radio choices or Choose several, up to 100 bytes each.
Show when this earlier answer matches	Select an earlier choice/checkbox/terms question or Always show.
Matching answer	Copy the exact choice; use 1 for checked or 0 for unchecked. Choose several matches when the selected list includes the choice.
Use answer for	Map an eligible answer to one billing field. Each billing destination can be mapped only once.
Starting answer	Optional valid suggestion. For Choose several, use one exact choice per line. No defaults for terms, private documents, layout or sensitive answers.
Field width	Full width or Half width. Half returns to full on small screens.
Customer profile changes	Read-only after submission; Customer can update; or Staff review before applying.
Contains sensitive information	Keeps answers out of registration emails and new order details/emails; editable sensitive changes require review.
Show this answer in	Independently select Customer business account, Registration emails, Staff order details and Order emails. New fields start with account display only.
Remove this question from future applications	Remove dependent conditions first. Existing submitted answers/documents remain in retained records.

Use no more than 200 field definitions, including disabled questions and headings/descriptions, and no more than three private-document fields. A condition follows one earlier parent; there is no compound-expression editor. Update dependent questions before removing their parent or changing away a required choice. A field can be disabled as a reversible way to stop collecting it. Deleting the definition cannot be undone by an automatic restore control; create/reconfigure a field deliberately if needed, while old answers remain historical records.

Files and layout items are always read-only and do not become ordinary email/order answer rows or billing mappings. Terms consent is not editable in the later profile form. A sensitive answer can be displayed to the owner in Business account when selected, and authorized account staff can inspect retained information. Later display changes narrow what new messages/orders can disclose; they do not erase mail already sent or an existing order's captured details.

An existing answer must allow a display destination in both its retained submission settings and the current field settings. Turning on a new destination later does not expose earlier answers there, and clearing **Contains sensitive information** does not release an answer previously stored as sensitive into messages or new order details. Removing or disabling a question, changing its answer type, or making its condition no longer apply can hide the retained answer from the owner's view while authorized staff can still inspect the stored record.

Review the saved form

Open **Customer preview** after publishing your question settings. Select Customer or a business type, including a closed type when reviewing its saved design. Enter sample values and select **Update preview** to see conditions without JavaScript. The preview does not create a login, submit an application, upload a file or send mail. The sample email and document inputs are disabled. Real registration follows the store's own username/password settings. Preview uses saved configuration, so publish a field change before expecting it here.

B2B's own form controls include visible labels, help and keyboard focus. The question grid adjusts to one column on small screens. Your theme continues to control the surrounding account navigation. An owner's **Update business details** form shows the questions of the owner's own account type, also when that is not the default business type.

Approval, billing and protection options

Approval & billing lists each type's current approval policy and group, with **Edit this approval policy** and **Review submitted applications**. The same screen contains these settings:

Control	Default and effect
Reuse application details for billing	Off. Enables owner-reviewed reuse and the selected optional automatic timing.
When to fill empty billing fields	Buyer reviews and applies by default; alternatively After a valid application or After business approval.
Offer a business application at Classic checkout	Off. Also needs native checkout account creation. Checkout Blocks links to full signup.
Require a simple verification question	Off. Shows a local arithmetic question; no external service key needed.
Minimum seconds before submission	0, meaning no minimum delay. Accepts 0–60 seconds.

Control	Default and effect
Submission limit per hour	5 by default; configure 3–50. The hidden bot field and request limit remain in use. Repeated accepted attempts extend the hour-long counter window.

Review and publish these options. Existing application, billing or account records are not erased when an option is switched off. A fresh question form may be required after changing application settings.

Update saved business details

An owner with a pending, approved or on-hold account may see **Update business details**. Only fields that the store allows you to change appear. Read-only original fields and document uploads are not general profile edit controls. Open the disclosure, edit the available answers, use **Update questions** if conditions need refreshing, then choose **Save business details**.

Ordinary editable answers apply when saved. Changes marked for staff review stay pending while the current answers remain in use. The form names the answers requiring review. A sensitive answer or a dependent answer whose parent is under review is also held for review. Changing profile answers does not change business approval, pricing group, tax exemption or team permission.

The latest proposed values are shown when reopening the form. Another submission replaces the previous pending proposal; that older proposal remains in account history. Returning the reviewed fields to their current saved values and saving withdraws the pending proposal. A changed account or questionnaire requires reloading before saving. If a change would reveal a required question or document you cannot edit here, the form asks you to contact the store. The previous hidden answers remain retained.

Store staff open the account and inspect **Profile changes awaiting review**, comparing **Current** and **Proposed** values. **Accept profile changes** applies the complete current proposal. **Reject profile changes** keeps the existing values and clears the proposal. If the account/questions changed, reload or ask the owner to submit a refreshed proposal. These buttons do not approve the business account itself. There is no automatic profile-decision email from this workflow.

Retained application answers lists submitted/before-change snapshots with their original labels and UTC dates, 20 at a time. Select **Older snapshots** for earlier entries. This is retained history, not an automatic rollback tool. Document contents are kept separately, so answer history is not an archive of every replaced upload.

Reuse application details for billing

When the store enables reuse, the owner can open **Use application details for billing** in Business account. Review the listed proposed fields and choose **Fill these empty billing fields**. Only eligible empty WooCommerce billing fields are filled. Existing values are kept, and an existing address is kept together: if any address component is present, the application will not supply pieces of a different address. An application address needs a valid country; a recognized state/province name can be converted to its country code.

A changed application or billing address invalidates the reviewed proposal; open it again before applying. If there is nothing eligible to fill, use the native My Account billing address editor. Login email, password, shipping address and payment details are not changed by billing reuse. Review your billing address before checkout after

copying. To undo an unwanted copied value, edit the billing address through WooCommerce; there is no separate copy-undo button.

Staff map questions with **Use answer for**. Billing email requires an Email question, country a Country question, phone Phone or Short answer, and all other destinations Short answer. Destinations are first name, last name, company, email, phone, address lines 1/2, city, state/postcode/country. One destination can be mapped once. An explicit company/phone mapping takes priority over the standard business name/phone fallback.

Automatic timing can fill eligible empty values after a valid application or after approval. It uses the same keep-existing-address approach. If automatic copy cannot complete, the account decision remains saved and the owner's reviewed-copy option remains available. It does not continuously overwrite populated billing fields when profile answers change. Invalid country, state or billing email needs correction before automatic reuse succeeds.

Private documents

Each application can contain up to three PDF, JPEG or PNG files, each up to 2 MiB. Use a short filename (sanitized filename up to 160 bytes). The contents must agree with the extension; export a fresh file if the form rejects it. A host's upload limit can be lower. Choose the document again after an incomplete upload, an error page or Update questions.

Submitted files appear under **Private documents** with their original question label, filename and size. The owner and authorized store staff can download them from the account; invited company members do not automatically receive access. A document link requires the authorized signed-in account and is not a public sharing link. Files are stored in B2B records rather than ordinary public Media Library URLs. They are not attached to registration mail or order emails, and uploading evidence does not grant tax exemption.

Resubmitting a rejected/withdrawn application replaces all previous document originals with the files selected for the new submission. Select optional files again if you want them retained. Store staff may open **Remove stored document**, check **Permanently remove this file. Account approval will stay as it is**, and choose **Remove document**. This permanently removes that stored file, without changing account approval; the account can retain a removed/unavailable reference. There is no restore button. Reload if the application changed before removal. If a stored file fails verification, ask the store to review its backup.

Application messages

Open **Applications → Messages**. Set **Administrator recipients** to between one and five bare email addresses separated by commas. Within each event, choose **Send to customer**, **Send to administrator recipients**, Subject and Message. Use plain text and the placeholders {business}, {contact}, {status} and {store}. A subject is required and limited to 160 bytes; each message body allows 4000 bytes. Customer mail uses the owner's saved login email, not a different email answer in the questionnaire.

Event	Default customer mail	Default administrator mail	Purpose
Application received	On	On	Acknowledge first submission.
Awaiting review	Off	Off	Explain the pending review state.

Event	Default customer mail	Default administrator mail	Purpose
Account approved	On	Off	Tell the owner to sign in for business terms.
Application not approved	On	Off	Explain updating and resubmitting.
Updated application received	On	On	Acknowledge resubmission.
Account on hold	On	Off	Ask the owner to contact the store.
Application withdrawn	On	Off	Explain that another application can be submitted.

Messages also supply status text in Business account. A successful automatic approval can send both the receipt and the approval message. Only permitted nonsensitive answers selected for Registration emails are included; private documents are excluded. Changing a template affects future messages, not messages already sent.

Publish changes before using **Preview and test saved messages**. Select Message event and **Preview saved message** to see sample business/contact values. **Send test to my email** sends only to your own current administrator login email, once per minute. It does not send a customer application or include private answers. **Recent mailer results** shows 20 recent receipts as Accepted by mailer or Not accepted by mailer, with UTC dates. Acceptance confirms handoff to the mailer, not inbox delivery; use your inbox/mail settings to investigate missing mail. A failed send does not roll back an application or automatically retry the message.

Business details on orders

Staff can choose which nonsensitive answers appear in staff order details and order emails. For new approved-business checkout orders, B2B captures the permitted labels and values at creation. Later changes to the application or question wording do not rewrite that order's historical details. Existing orders are not automatically filled from a newer profile. Removing a display permission prevents newly generated snapshots from including that answer; it does not retroactively delete the answer from an older order or previously sent email. Store staff see the staff-order version, while order emails use the separately selected email version.

Manage limited customer roles

Open **Applications → Customer roles** with both business-management and user-role-management permission. The list shows safe customer roles and assigned-user counts. A customer role labels a limited WordPress audience; business approval, business-group prices and company-team permissions remain separate.

To create a role, choose **Create a customer role**, enter a stable lowercase key and Customer-role name, choose a limited copy source if needed, and set **Allow normal signed-in customer access** explicitly. New keys receive the af sd_b2b_ prefix; the part after that prefix starts with a letter and contains up to 47 lowercase letters, numbers or underscores. Keys cannot be renamed later. The customer-role name allows 120 bytes. The role can have only WordPress's basic read access or no platform capabilities. Staff/administrator capabilities are not created or copied. Review and publish. **Update a managed customer role** changes a B2B-owned role's

label/read setting; it cannot edit an unrelated role. If it is the platform's default registration role, change that default first.

An approved application mapping adds its safe role while preserving existing customer roles. Users with staff or other noncustomer permissions keep their platform roles unchanged. Suspension/rejection removes only an automatic role addition B2B recorded as its own; independent existing assignments stay. A role by itself is not business approval.

Preview customer-role assignment lets you search by name/email, choose one of up to 25 matching users and a Proposed customer role, then select **Preview assignment**. It shows Current and Proposed roles and whether an automatic addition is permitted. It does not apply the role, approve the account or change team permissions.

To retire a managed role, choose **Reassign users and retire a managed role** and a different safe Replacement. First update any catalog/page, pricing, purchase-method or tax audiences still referencing the old role. Review/publish processes up to 200 users and 200 account mappings and updates signup-type mappings. Repeat the reviewed retirement while the screen says records remain. The role is removed after its members/mappings are exhausted. Other user roles and submitted history remain. There is no automatic restoration of the old role after retirement; create/reassign deliberately if needed.

Choose catalog audiences and denied-access recovery

Catalog rules can control seeing a product, seeing its price and purchasing it separately. When a rule uses a selected audience, choose named customers, approved business customer roles, approved business groups, guests and/or registered retail customers. Any selected included audience can match that rule; **Exclude these customers from this rule** takes priority. Pending, rejected, withdrawn and on-hold business accounts do not receive selected-audience access. A specifically named retail customer can match, but a role/group selection requires approved business status.

Use **Search named customers or business groups**, then **Update named choices without saving**. Search text allows 100 bytes. Lists show up to 50 search results and preserve existing selections; use Ctrl/Command to select multiple. Each rule supports up to 100 selections in each named audience list; use a role/group for a larger audience. An unavailable selection must be removed before publishing. Updating choices alone never publishes a rule.

An allowed product rule does not unlock another restriction on its category or the whole store. Use **Check catalog access as a customer** to search for a customer/product (or choose Guest visitor), then **Search / check access**. Read the separate Can see product, Can see price and Can purchase results. This preview does not impersonate the user or change a cart. Stock, team permission, quantity, quote and checkout limits still apply when actually buying.

Choose **Message when access is denied**, or leave it blank for the standard text; a custom message allows 500 bytes. **Recovery action** can Show the message, Show a custom link or Redirect to a local page. A custom link needs its label, up to 100 bytes, and full local URL, up to 1000 bytes. Use the current site's homepage or a published unrestricted page/post, with the same scheme/host/port and no query/fragment. Redirects apply to ordinary page/product requests; API/cart requests remain denied. If a recovery destination becomes restricted or unavailable, the standard explanation remains available.

Restrict selected pages and posts

Open **Page and post access**, then **Set page access**. Enter a Page or post ID or choose from recent editable pages/posts. Select **Who can view it?** and configure any named choices and denial message/recovery action. Review and publish. Up to 100 restrictions can be stored.

Audience	Who can view the page through this rule
Approved business accounts	Approved business customers.
Selected customers, roles, groups or guests	The named-audience choices above, after exclusions.
Approved accounts in selected business groups	Approved customers in at least one selected existing business group, chosen by name (up to 200); the separate Selected audience named lists accept 100 each.
Pending business applicants	Signed-in pending applicants.
Retail customers and visitors	Ordinary consumer/visitor context plus rejected or withdrawn applicants; not pending, approved or on-hold business accounts.

A WordPress editor who can edit the page retains that access. Native WordPress private/password/draft rules still apply. Application, account, cart, checkout, shop and privacy pages, plus pages containing core B2B/WooCommerce account/purchase shortcodes, are protected from these extra restrictions so the recovery paths remain available. To remove a rule, open it and check **Remove this B2B restriction**, then review/publish; native visibility is unchanged.

Denied visitors see the account-status explanation and sign-in/application links, or your valid custom recovery. Restricted content is also filtered from native search/list results, menus, excerpts/titles and appropriate REST/comment responses. Public feeds, sitemaps and embeds omit restricted pages even when a signed-in buyer can view them directly. Catalog controls likewise filter supported native product/category menus, queries and public interfaces. Personalized responses are marked private when WordPress processes them. After publishing changes, clear page/CDN/search caches that may hold older content. Media links, copied content and external feeds retain their own access arrangements.

Application and access problem reference

Message or situation	Next step
Registration closed / no business types available	Sign in to an existing account or ask the store; staff should check native registration and enabled business types.
Questions/account changed	Reload the current form, review values and submit again; reselect files/password when needed.
Required answer / invalid choice	Complete the current visible question using a listed choice or its displayed format.
Verification expired / too quickly	Refresh the form and complete its verification after the required time.
Submission limit	Wait, or sign in if a prior attempt already created your login.
Account/application saved, no order placed	Sign in, read business status and review the refreshed checkout before purchasing.

Message or situation	Next step
Profile proposal changed	Reload before staff review; the owner may need to submit a new proposal.
Change needs a new noneditable answer	Contact the store to update the application or its question policy.
Billing details changed / invalid country or state	Review the current My Account billing address and reopen the copy proposal.
File removed/unavailable	Open from the authorized owner/staff account; ask staff about removal or verified backup recovery.
Customer roles/references changed	Reload and review the current role plan; resolve reported audience references before retirement.
Access temporarily unavailable	Contact the store; a temporary policy/storage failure does not grant restricted access.
Mail not accepted	Inspect store mail configuration; the application itself remains saved.

The technical account and registration chapters describe exact service, field, permission and storage contracts for developers and hosting support.

How business prices are chosen

B2B prices belong to your business terms; they do not replace the regular or sale prices saved on WooCommerce products. Customers must have approved business access before these terms apply. Protected licensed products, gifts and other products managed by an integration keep their owning purchase workflow. A native customer role alone does not approve a business account.

For an ordinary product, B2B checks **account terms first, then the business group, then a matching customer-role rule, then business defaults**. At an account, group or default level, a product price exception takes priority over a matching price book, and the book takes priority over that level's general discount. An exact variation exception wins over its parent-product exception within that audience. Pricing levels do not stack. One separately configured business cart discount may apply afterward when the chosen unit terms permit it.

An inherited discount lets the next audience's terms apply. **No percentage discount (0%)** is an explicit choice that stops lower audiences from supplying a price, including their product exceptions, price books, role rules and general discounts. A product exception or book for the same audience still takes priority over its 0% setting. A **regular price** basis uses the product's saved regular price. A **sale price** basis uses its active WooCommerce sale price, otherwise the regular price. An inherited basis uses the group's basis and then business defaults. Exact prices stand on their own, including an intentional zero-price unit; changing store currency requires review of exact amounts.

Price method	What it does	Example with a base price of 100
Exact unit price	Sets the unit price to the entered amount.	Enter 80: unit price 80.
Percentage off the price basis	Discounts the selected base.	Enter 15: unit price 85.
Amount off each unit	Subtracts the amount, stopping at zero.	Enter 15: unit price 85.

Price method	What it does	Example with a base price of 100
Percentage added to the price basis	Adds the percentage to the base.	Enter 15: unit price 115.
Amount added to each unit	Adds the amount to the base.	Enter 15: unit price 115.

Percentage discounts accept 0–100 with up to four decimal places. Percentage increases accept 0–10,000 with up to four decimal places. Ordinary exact amounts, per-unit adjustments and reference amounts accept up to six decimal places, through 999,999.999999; a resulting markup must stay within that amount. Use a decimal point without currency symbols, grouping commas, signs or scientific notation. Percentage and amount adjustments need a usable product base price.

Volume pricing applies the matching band's rate to every qualifying unit. **Graduated** pricing gives each band its own rate and displays a blended unit price in the cart. With prices of 10 for units 1–9 and 8 from unit 10, buying 12 costs 96 in volume mode. In graduated mode it costs $9 \times 10 + 3 \times 8 = 114$, or 9.5 per unit. Calculations retain six decimal places before WooCommerce's currency and tax handling.

Business baskets support up to 200 lines and 10,000 units per eligible line, with at most 2,000,000 eligible units. Quantity prices are one part of ordering: availability, stock, product limits, purchase limits, quote requirements, tax, delivery and company approvals still apply. An agreed quote uses its own accepted prices and prevents ordinary promotional repricing of that quote basket.

Set a general discount

Open **Pricing & discounts**, choose **Who receives these prices?**, then select **Open these terms**. Choose All approved businesses, one business group or one account. Use the named search when the desired choice is not initially listed. Loading terms does not save anything. The workspace shows the inherited general discount for accounts/groups and warns when an account is not yet approved; saving pricing does not approve it.

Control	How to use it
Discount choice	Choose Use inherited discount , Set a discount percentage or No percentage discount (0%) . Business defaults have no inherited option.
Discount percentage	Enter 0–100, with up to four decimals, when setting a discount percentage.
Calculate from	Choose regular price, active Woo sale price otherwise regular, or an inherited basis where offered.
Check a real product before publishing	Expand to compare a real product before saving. This is optional.
Preview as a business customer	Choose an approved account receiving these terms. An account edit uses that account; a group preview needs an account in the group.
Product to check	Choose a simple product or an exact variation. For a variable product, choose the specific option.
Quantity to check	Defaults to 1; use a whole quantity through 2,000,000 for this single-product comparison.

Choose **Review changes**. The review identifies the audience, discount and basis. If you selected a product, it also shows the current and proposed unit prices, product base, winning terms and tax basis. A more specific product

exception or book can still win, so changing a general discount may leave that product's final price unchanged. This comparison does not apply live cart discounts or calculate shipping, final taxes or checkout acceptance.

Use the review's publish/apply control to save, or **Back to editor** to change the draft. Leaving without applying keeps the published terms. The focused editor preserves unrelated account/group settings. If terms changed while the form was open, reopen them and review your intended edit against the current values. After saving, change the same controls and publish again to reverse the change.

The workspace also provides links to **Create or manage business groups**, **Assign customers and review approval**, **Product prices**, **Agency license programs**, **Quantity pricing & price books**, **Order limits & purchasing**, **Check published prices** and **Catalog & quantities**. These links lead to their own records and controls.

To set a product exception, open **Product prices**, choose the audience and product/variation, then enter either an **Exact unit price** or a percentage discount. Choose **Use the exact unit price above** for a fixed price; clear the exact amount when selecting a percentage. Zero is a deliberate free unit price. The optional **Check the customer price before publishing** uses an approved customer and the selected product or one of the chosen parent's variations. Review and publish in the shared editor. Product updating in WooCommerce is not a substitute for publishing this business record.

Set customer-role prices

Customer role prices is part of Pricing & discounts. Use it when approved business customers sharing a native customer role need the same price terms. Account and group pricing still take priority. One role rule wins before business defaults; customers with several roles do not receive stacked role discounts.

Control	What to enter or choose
Rule name	A required recognizable name, up to 120 bytes of plain text.
Customer role	One current customer role. Unavailable saved roles are marked for review.
Priority	Defaults to 100; whole 0–100,000. Lower numbers win. Give overlapping rules different priorities; ties use their stable saved reference.
Apply these role prices to	All ordinary products, Selected products and variations, or Selected categories and descendants.
Search named products or categories	Enter a search, then choose Update choices without saving . Do this after changing target type as well.
Named products or categories	Select at least one for product/category rules. A parent includes variations; categories include descendants.
Percentage discount	Enter 0–100 with up to four decimals, leaving exact price empty.
Exact product price	Available only for selected products; leave percentage empty. Every selected product receives the same exact unit amount.
Discount basis	Regular product price or current sale price; role rules require an explicit basis.
Allow a separately configured business cart discount	Off by default. Turn on only if this role price should also receive the separate business cart discount. Retail promotion rules remain in force.
Remove this role price rule	Offered for saved rules. Removal restores the next applicable business price after review.

Choose **Review changes**, check the named role, targets, priority, basis and price, then **Apply reviewed role rule**. **Back to editor** returns without saving. A review lasts 20 minutes and is tied to the exact change; if it expires or settings change, review again. Up to 200 role-price rules can be saved. To stop one, open it, select Remove and apply the reviewed removal. To undo an edit, publish the intended replacement terms.

Create and schedule a price book

Open **Quantity pricing & price books** to see **Price books and contracts**. Each entry shows its audience, version and current state. There are 25 books per page, with **Previous** and **Next**. Choose **Create a price book** to start an editable draft. Existing books provide **Details & schedule**, **Price rules**, **Cart discount**, **Coupon amounts**, **Customer guidance**, **Import / export** and **Version history**.

Start in Details & schedule:

Control	Clean default and use
Price book name	Empty; enter a required name up to 120 bytes.
Who receives these prices?	All approved businesses; choose an existing group or account when needed. Books do not use customer roles as an audience.
Status	Draft. Choose Draft, Active — follow the schedule, or Paused.
Starts at (UTC)	Blank means no start boundary. Enter a UTC date and time; the start is included.
Ends at (UTC)	Blank means no end boundary. The end must follow the start and is excluded.
Priority	10. Whole 0–999; lower wins between matching books for the same audience.
Price adjustment basis	Use inherited price basis, Regular product price or Active sale price otherwise regular.
Lock contract prices against further discounts	Off. Turn on to exclude matching book-priced lines from additional cart and promotional coupon discounts. Legitimate stored credit keeps its own rules.
Show the regular or merchant reference price	Off. Turn on to show the reference and differences in quantity-price tables.
Excluded products and variations	Empty. Select products to leave to other pricing; a selected parent includes its variations.
Excluded categories	Empty. Category descendants are included.
Change note	Optional reason/agreement note, up to 500 bytes, stored with the version.

Plain-text length checks count bytes, so text with multibyte characters may reach a limit sooner than an equal number of simple Latin characters. Each exclusion list accepts up to 200 selections.

Choose **Review changes**, inspect the audience, schedule, currency and priority, then publish the review. A newly saved Draft remains inactive. Add rules and check prices, then return to Details & schedule to activate when ready. Paused books keep their contents and history without affecting prices. Active books show **Active now**,

Scheduled or **Expired** according to the current UTC time. A scheduled boundary takes effect as prices are evaluated; it does not require manually changing the status at that time.

Active books for the same audience cannot share a priority during overlapping schedules. Separate their priorities or schedules, or pause one. At most 100 active, unexpired books can be considered for an account, including future-scheduled books. Each book supports 200 rules, 20 bands per rule and 30 coupon amounts, with a total configuration size of 256 KiB. Split an overly large book into clearer smaller sets of terms.

A book binds monetary amounts to the store currency. If the currency changes, reopen the book and review the intended amounts before using it. Every published edit keeps a new version. To stop a book, pause it; the book sections do not provide a whole-book delete button.

Add product and quantity rules

Open a saved book's **Price rules** and select **Add a price rule**, or open a listed rule. Save the book draft first before adding a rule.

Control	What it determines
Rule name / key	A stable 1–40-character key beginning with a lowercase letter, followed by lowercase letters, numbers or underscores. Published keys cannot be renamed in place.
Apply to	One product/variation, one category and descendants, or all ordinary products. This determines who receives the price.
Product or variation	Used for a product target. A parent product includes its variations.
Category	Used for a category target, including descendants.
Price method	Exact unit price, percentage off, amount off each unit, percentage added, or amount added to each unit.
How bands apply	Volume — one rate for all qualifying units, or Graduated — each band keeps its rate.
Count quantities across	Choose one of the five counting choices below. This determines what qualifies the receiving product for the rate.
Products counted when Selected eligible products is chosen	Choose the qualifying products; parents include variations. Up to 200 selections; at least one is required for that counting choice.
Minimum qualifying quantity	Blank/0 disables the lower limit; otherwise whole units up to 2,000,000.
Maximum qualifying quantity	Blank/0 disables the upper limit; a nonzero value cannot be below minimum.
Minimum qualifying merchandise value	Blank disables; 0 is a real boundary. Use store-currency amounts up to six decimals.
Maximum qualifying merchandise value	Blank disables; 0 is a real boundary. Must not be below minimum.
Quantity bands	Enter the starting quantity, optional inclusive end and the price/adjustment for each band.
Merchant reference price (optional)	Used when comparison display is on. Blank uses the product's regular price; zero is a deliberate reference amount.

Control	What it determines
Compare a product before publishing (optional)	Choose an approved account, exact product/variation and test quantity; default test quantity is 10.
Remove this price rule	Existing rules only; review removal before publishing the new book version.
Change note	Optional version note.

Count quantities across	What counts
Each exact product / variation	Combined lines for that exact product or variation.
Variations of each parent product	Variations belonging to the same parent.
All eligible products matching this rule	Eligible products that match the rule's receiving target.
All eligible products in the cart	All eligible products after this book's exclusions.
Selected eligible products	Only the chosen products/parents, even when the receiving target differs.

Protected, quote-owned and excluded products do not contribute. A contract lock prevents additional cart/coupon discounts; it does not automatically remove a product from every other rule's quantity counting. Optional quantity and value conditions use the same counting selection and must all be met. Qualifying value uses this book's base regular/current sale prices before its discounts, coupons, shipping and added taxes. If a counted product has no usable base for a required value comparison, the rule does not qualify. These conditions change which price applies; they do not prevent a purchase. Purchase limits and Catalog & quantities handle ordering restrictions separately.

Within one book, exact variation/product rules precede parent, category and all-product rules, provided their conditions and bands qualify. Two equally specific matches can conflict, such as two categories containing the same product. Remove that ambiguity. A book cannot contain two rules for the same exact target; combine their bands in one rule. For matching books at the same audience level, priority decides which book wins.

Enter bands in increasing starting order, using 1–2,000,000 whole units. An explicit ending quantity is inclusive, must not precede its start and must stay below the next band's start. A blank end runs until the next band's start; a blank final end remains open. Volume bands may leave gaps or end at a maximum: quantities outside them use other applicable pricing. Graduated bands must start at 1, cover every unit without gaps, leave the final end open and count each exact product/variation separately.

Choose **Review changes** and check the complete rule description. The optional before/proposed comparison respects the book's actual status and schedule: it does not activate a Draft, paused or future book just for the comparison. Publish only after the intended audience, rate, counting selection and conditions are correct. To reverse a rule change, publish another edit/remove the rule or restore a prior complete book version.

Work with the band rows

Each row has **Starting quantity** (or starting quantity/value for a cart discount), **Ending value (optional)**, **Unit price or adjustment** (or Cart discount), **Applies to** and actions. The displayed range helps review what the row covers. The browser accepts up to 20 characters per numeric field; the final amount, percentage and quantity bounds still apply.

With enhanced UI, use **Add a band** to reveal another row and **Remove** to remove a draft row. There are at most 20 bands. Add/Remove changes the form only; it does not publish prices. The range labels update as you type and flag invalid ordering or overlap. Without enhanced UI or scripts, all 20 rows are available: fill the ones you need and leave all three fields blank in unused rows. Clearing only one required value is an error. Clear every field in a row to remove it when using the native form.

Add a separate cart discount

A book's **Cart discount** is an additional explicit adjustment after unit pricing. It is selected independently of the book or exception that supplied each unit price. Only one cart-discount book is used: account before group before defaults, then lower priority within that audience. If the chosen book's threshold is not met, another lower-priority cart book does not automatically take its place.

Control	Use
Qualify the cart by	No cart discount (default), Combined eligible units , or Merchandise value in the store price basis .
Cart discount method	Percentage off eligible merchandise (default), or Fixed amount off the eligible cart . A fixed amount is the total cart discount, not an amount per unit.
Eligible products for this cart discount	Empty includes all eligible products. Otherwise choose products/parents; only that selection both qualifies and receives the discount. Up to 200 selections.
Quantity bands	Enter increasing quantity or value thresholds, optional inclusive ends and each band's discount. Up to 20 bands.
Change note	Optional reason saved in history.

Eligible lines need an ordinary business price and must be unlocked, unquoted, unprotected and not excluded by the chosen book. Merchandise value uses business prices after unit pricing but before this cart discount, coupons, shipping, fees and added taxes. The highest matching band applies once. Percentage discounts accept up to 100%; quantity thresholds are whole units. Value thresholds use store-currency amounts.

A fixed discount is shared proportionally between eligible line values and capped at their combined value; no line becomes negative. A 10 discount shared across eligible values of 60 and 40 allocates 6 and 4. Fixed amounts must use whole minor units, such as cents in a two-decimal currency. Currencies with zero through six decimal places are supported. Some quantity/rounding combinations cannot preserve an exact fixed discount in both unit prices and the cart subtotal; the calculation then stops with a message to change quantities or use a percentage. It does not silently substitute an approximate total.

Review and publish the cart section. Choose No cart discount and publish to remove it; that clears its bands. A contract lock on the winning unit price prevents this extra discount. Customer guidance can show the current qualification and the next threshold using the same eligible set.

Set business coupon amounts

Open **Coupon amounts** and enter one line per existing coupon in **Existing coupon code**, **business amount**:

your-business-code, 5

Use a percentage for a percent coupon and a store-currency amount for fixed-cart or fixed-product coupons. The original coupon must already exist in WooCommerce. Up to 30 different codes can be assigned; enter each

once. Percentage amounts accept 0–100 with four decimals, and fixed amounts use the ordinary six-decimal money limit. The form text box supports 4,000 characters.

The first applicable account/group/default book containing that code supplies its amount. The code is not applied automatically. WooCommerce's expiry, product, usage and combination rules still apply, as do the business promotion policy and contract locks. Stored-credit instruments are not supported by this amount editor and retain their owning balance/redemption rules.

Review and publish. To remove book-specific amounts, clear the relevant rows and publish; clearing the whole box removes all assignments in that book. If a coupon's type changes afterward, remove its assignment and add the intended amount again. A mismatched type or unavailable calculation can make the assigned coupon unusable until reviewed. Locked or otherwise ineligible lines do not receive the promotional coupon discount.

Customize customer pricing guidance

Use **Customer guidance** to name the book's quantity-price table and customize messages before and after a cart-discount threshold. These are plain text, with no HTML. Labels allow up to 200 bytes and messages up to 500 bytes; multibyte characters can reach the server limit sooner than the same number of simple Latin characters.

Control	Standard value or allowed placeholders
Pricing table heading	Business quantity prices
Quantity column heading	Quantity
Unit price column heading	Unit price
Comparison column heading	Difference per unit
Before the next cart discount	{remaining}, {threshold}, {qualified}, {discount}
After the cart discount applies	{qualified}, {discount}

Leave a label or message blank to use the standard wording. Unsupported placeholders are rejected. For example, “Add {remaining} more to reach {threshold} and receive {discount}.” adapts to quantities or eligible money according to the cart measure. A fixed amount is described as “up to” that amount because it cannot exceed eligible value. Review and publish this section independently of its pricing rules.

Approved customers with permission to see the product price can see relevant quantity terms on product pages. Variable products show terms for the chosen variation. Volume tables show qualifying ranges; graduated tables show the individual band rates and explain the blended cart price. Optional reference columns show savings, an amount above reference or no difference. The reference is identified as the merchant reference or regular product price. Use an accurate reference; it is not evidence of previous retail sales.

Tables describe book terms; the actual cart confirms the customer's winning price. In particular, customer-role terms can override business-default pricing even when a default book's quantity table is present. Price preview is useful for checking that customer's actual result. Conditions involving qualifying value are explained beneath the table. **Ordering this product** separately states product minimums, maximums, increments and applicable quote requirements. A missing supplemental table does not remove checkout restrictions.

The cart can show **Business pricing** per item, naming the price source, book version, qualifying quantity, graduated blend, cart discount or contract lock. **Business cart terms** and **Your business purchasing terms** describe qualification progress and purchase limits. The native Blocks item information can include these explanations once per cart as well. Shipping, taxes, stock and order validation continue to determine whether checkout can proceed.

Import and export price rules

Open a saved book's **Import / export** section. **Download current rules CSV** exports its product/quantity rules; **Download example CSV** provides an accepted example without catalog-specific IDs. The example demonstrates all-products percentage-volume bands at 10–49 and 50–100 units. Downloading changes nothing. If the book changed since it was opened, refresh before downloading the current revision.

The current column order is:

```
rule_key, target_type, target, method, mode, aggregate, from, value, retail, to, selected_products, quantity_min, quantity_max, value_min, value_max
```

Column	Meaning
rule_key	Stable rule key, repeated for every band of that rule.
target_type	product, category or all.
target	Product/category numeric ID, 0 for all, or sku: YOUR-SKU for a product target.
method	fixed, percent, amount, percent_increase, amount_increase.
mode	volume or graduated.
aggregate	sku, parent, matching, cart or selected.
from	This band's starting quantity.
value	This band's exact unit price or adjustment.
retail	Optional merchant reference amount.
to	Optional inclusive end.
selected_products	Numeric product IDs separated by semicolons.
quantity_min, quantity_max	Optional whole-unit qualification boundaries; blank/0 means none.
value_min, value_max	Optional base-value boundaries; blank means none and 0 is a real boundary.

The previous nine-column format ending at `retail` remains accepted. Keep an exact supported header and column order. Put one band on each row; all repeated fields for a rule must stay identical apart from its `from`/`value`/`to`. Imports use the same targets, bounds, graduated rules and overlap checks as the form.

Choose **Import behavior**:

- **Update matching rule keys and add new ones** replaces each imported matching rule completely, including its bands, and adds new keys. Other saved keys remain.
- **Replace this book's complete rule list** replaces all product/quantity rules with the imported list.

Choose either a **CSV file (optional, up to 256 KB)** or paste into **Or paste the price-rule CSV**. Do not supply both. Use UTF-8, comma-separated CSV with double-quoted fields where needed. An initial UTF-8 byte-order mark and blank lines are accepted. Limits are 256 KiB, 4,000 data rows, 200 rules and 20 bands per rule. Unknown SKUs, wrong column counts, inconsistent rows or invalid rules stop the import.

Select **Review changes** and inspect the audience, status, rule counts and all resulting rule descriptions. Publish the review to apply the complete import. Nothing is saved by selecting a file, pasting text or reviewing. The import changes only this book's product rules; schedule, audience, cart discount, coupon amounts and guidance remain in their sections. If you use native searches without enhanced UI, complete any selection searches before choosing an upload file.

After publication, use Version history to reverse an import by restoring an earlier complete book. That restoration also restores the earlier book's other configuration, so inspect the full review before applying it.

Review changes and restore a book version

Every book edit goes through **Review changes**. The review shows the next version, audience, status, UTC schedule, priority, basis/currency, lock/comparison choices, exclusions, before/after rule counts, cart configuration and coupon amounts. Rule edits identify the changed or removed rule. Guidance edits show all resulting labels/messages. Imports and restorations show the complete resulting rule list.

Back to editor returns to the submitted section without publishing. Abandoning a review leaves saved terms unchanged. If a native form reports an error, the submitted draft is shown for correction; if another person changed the book or settings, reopen current values before reapplying it. Draft retention does not authorize overwriting someone else's later revision. Copy substantial unfinished input before deliberately reloading the page.

Version history lists 25 versions per page, newest first, with UTC date/time and change note. Select **Review this version / restore** for a version of that book. Restoring creates a new version; it keeps the historical version as well. It restores the whole historical name, audience and configuration, including status and dates. An old version can therefore be expired, scheduled or immediately active. Review these fields carefully and resolve any current-currency, missing-target, coupon or schedule-conflict messages before publishing.

Unpublished browser work is not part of version history. To reverse an ordinary edit, publish new intended values. To stop a book without removing history, set it to Paused. To remove one rule, use that rule's removal control. Restore is not a general WooCommerce product, order or customer-data rollback.

Check published prices

Open **Check published prices** to use **Price preview**. Choose an **Approved business account**, then either select a **Product or exact variation** and **Quantity**, or expand **Preview a bulk basket instead** and enter SKU, quantity lines. Do not fill both product and bulk choices. The default single-product quantity is 1. A product without a SKU can use the named selector. Variable products need an exact variation.

The bulk box accepts up to 100 nonempty rows, with a browser text limit of 16,000 characters; each product quantity must be a whole number from 1 to 10,000. Protected products use their own pricing workflow and cannot be calculated here as ordinary discounts.

Select **Calculate preview**. Results identify product, SKU, quantity, unit price, line amount and the rule/source that supplied the price, including applicable book revision, role or cart adjustment. If a product has no usable

business price, the result says so. Preview reads current published rules and does not change a customer cart or order. It uses the store's catalog tax basis before coupons, delivery and final tax rounding. It does not promise stock availability or checkout approval.

General-discount and product-exception editors offer a smaller current-versus-proposed unit-price comparison. Price-book rule comparisons use the draft book as a temporary alternative, but its Draft/Paused/future schedule remains effective. To check actual activated book behavior, publish the intended active schedule and then run Check published prices for a receiving customer and representative basket.

Search named choices and keep a draft

Pricing selectors show real account, group, product, category and user names. Use **Search choices** and **Search** to narrow by a name; product search also accepts SKUs. Account choices include owner email, categories include the slug, and users include email. Only current approved accounts appear where the form specifically asks for an approved account. Ordinary product choices include published/private simple products, variable parents and variations; protected or unsupported products are not offered.

A search returns up to 50 choices and accepts a search phrase up to 100 bytes. Narrow the phrase when a result is missing; there is no Next page within these pickers. A valid current selection stays visible. An unavailable previous selection is labelled explicitly rather than replaced with another account or product. Choose a valid replacement where the operation requires one.

For exclusion and qualifying-product lists, check the items to include and uncheck to remove. Selected items remain visible when you search; up to 200 can be selected. **Clear selected items** clears the draft selection only. It does not publish the form.

With enhanced UI, search updates choices in place and reports progress or failure. A failed or outdated response keeps your selection. Without scripts or enhanced UI, Search opens **Choose by name** while retaining a bounded form draft. Select a result and use **Continue to review**; searching never saves, and the continuation still requires review. If a draft is too large to retain, go back and finish or simplify the change before searching again. Choose an upload file after searching; a native search cannot carry a selected upload to the next page.

Open business prices from a WooCommerce product

Authorized managers can open **Business pricing** in the saved simple/variable product's data panel. Each saved variation also has **Business pricing for this variation**. The manager must be able to edit the exact product and its parent and have B2B license access. A protected or unsupported product shows that its existing workflow remains in control.

The panel links to the same B2B records as Product prices and Price books. Use **Add a business price in the shared editor**, **Open shared pricing editor**, **Open all product prices**, a related book or **Open price preview**. Links open in a new tab. Publishing a WooCommerce product update does not publish business-price changes; review and publish them in the shared B2B editor.

Product exceptions are shown for the exact product and its parent, with parent fallbacks marked. The list shows up to 25 exceptions. Related books show a bounded set of up to 25 candidate books, omit exclusions/nonmatches and identify draft, paused or scheduled states. Products with many category matches are directed to the complete book list. Separate book cart discounts and coupon amounts may exist beyond these product-rule summaries. Use the complete shared editors for all records and Price preview for an actual customer calculation. If records cannot load, refresh the product or open B2B directly.

Set account or group purchase limits

Open **Order limits & purchasing**, find **Business order limits — Set purchase boundaries by account or group**, choose **Who receives these purchase limits?** and select **Open these limits**. These controls decide whether an order meets the chosen boundaries. They are separate from quantity-price discounts, global order limits, product minimums/increments, quote thresholds, company budgets and purchase approvals.

One complete policy applies: account first, then group, then business defaults. **Use inherited purchase limits** moves to the next level. **No additional account or group limits** stops this policy's inheritance and adds no limits from it; other global/product/budget/quote requirements still apply. **Use the limits below** applies the full custom policy. Individual fields are not mixed between audiences. Business defaults start with no additional limits; groups/accounts start with inheritance.

Control	Default and use
Purchase limit policy	Inherit for account/group; no additional limits for business defaults.
Minimum eligible units	0 for no minimum; whole 0–9,999,999.
Maximum eligible units	0 for no maximum; whole 0–9,999,999.
Quantity increment	1; whole 1–9,999,999. Counts from the minimum.
Amount to check	Eligible merchandise total after coupons and before tax; choose the intended basis below.
Minimum amount	0 for no minimum.
Maximum amount	Blank for no maximum; 0 is a deliberate zero maximum.
Customer restriction messages	Expand to customize the five messages below.
Try a quantity and amount before publishing	Optional sample eligible units plus amount. Fill both or leave both empty.

For quantity minimum 26 and increment 5, allowed quantities are 26, 31, 36 and so on. A maximum must allow at least one valid purchase. Maximum amount must not be below minimum. Amounts accept up to six decimals and the supported ceiling of 999,999,999.999999, but must be whole currency minor units: for a currency using cents, enter no fraction smaller than a cent. A currency's actual precision can reduce the largest accepted boundary.

Amount to check has three distinct choices:

Choice	Amount counted
Eligible merchandise subtotal before coupons and tax	Current business-priced eligible merchandise before coupons, excluding shipping, fees and taxes.
Eligible merchandise total after coupons and before tax	Current business-priced eligible merchandise after coupons, excluding shipping, fees and taxes. Store Credit and gift cards are payment, not coupons, and never reduce this amount.

Choice	Amount counted
Final order total including all items, tax, shipping and fees	The complete WooCommerce total, including protected items and these added costs, when there is at least one eligible merchandise unit. Store Credit and gift cards applied to merchandise are added back: they pay the total and never reduce it.

Eligible quantities exclude protected licensed products, gifts and other integration-owned lines. The two eligible merchandise bases exclude those lines too. Values are added first and rounded once to the store's currency precision. For example, eligible values of 0.004 and 0.004 total 0.008, which rounds to 0.01 in a two-decimal currency. If the cart has no eligible units, these account/group limits do not activate. Empty carts and unapproved contexts likewise do not gain approval merely by having no active limit result.

Customer restriction messages offers **Below minimum quantity**, **Above maximum quantity**, **Quantity increment mismatch**, **Below minimum amount** and **Above maximum amount**. Each is required plain text, up to 500 bytes. These are the initial templates:

Message	Initial wording
Below minimum quantity	Order at least {minimum} eligible units. Add {remaining} more to continue.
Above maximum quantity	Your business order allows at most {maximum} eligible units. Remove {remaining} units or contact the store.
Quantity increment mismatch	Order eligible units in increments of {step}, starting at {minimum}. Your cart contains {quantity} eligible units.
Below minimum amount	Your {basis} must reach {minimum}. Add {remaining} in eligible value to continue.
Above maximum amount	Your {basis} cannot exceed {maximum}. Reduce it by {remaining} or contact the store.

All five accept {minimum}, {maximum}, {step}, {quantity}, {amount}, {remaining} and {basis}. The placeholders insert the current limits, cart facts, shortage/excess and chosen amount basis; money includes the currency. Use the listed placeholders only. Blank messages are rejected, so retain useful wording for the buyer.

The optional sample checks entered quantity and amount against this custom policy only. It does not build a cart, approve a budget, satisfy a quote requirement or guarantee checkout. The sample quantity can be 0–9,999,999; its entered amount is rounded to currency precision before comparison.

Select **Review changes**, check the audience, policy, boundaries, messages and sample result, then publish. **Back to editor** returns without saving. Saving binds the policy to current currency and decimal precision. If either changes, reopen and review the amounts again. If account/group/settings terms changed during editing, reload current limits and review the intended update. To stop these particular limits, publish the off policy; to restore inherited limits, publish inherit where available. Other restrictions remain in force.

At checkout, buyers receive the applicable minimum, maximum or increment message and must change their eligible quantity/value accordingly. If totals, currency or limits cannot be verified, refresh the cart or contact the store. The policy does not silently approve an order when verification is unavailable.

Pricing across carts, quotes and connected tools

The same pricing service supplies ordinary baskets, quick ordering and pricing facts used by connected commerce components. A preview reads prices; it does not change the buyer's live cart. A product-editor summary lists stored terms; it does not calculate a customer price. Agreed quote baskets retain their quote ownership. Store-credit instruments retain their own balances and redemption rules.

Connected tools must identify the actual current cart line when a price depends on a price book or quote. Duplicate product lines can legitimately receive different allocated cents from a fixed cart discount. When an order line is created, its product, variation, quantity and native totals must identify the reviewed cart price. If that match is unavailable, refresh/recalculate the cart and review it again; reusing an old price reference is not a recovery path.

For technical integrations, the pricing calculation and identity contracts describe decision fields, protected-line boundaries and order matching. These are service contracts, not an extra customer-facing price editor or a separate public pricing-write screen.

Currency switchers

B2B works with two currency switchers: **WPML Multilingual & Multicurrency for WooCommerce** (its multicurrency) and **FOX - Currency Switcher with Is multiple allowed** on (so orders are paid in the currency the shopper chose). With either one, an approved business customer who switches the shop to another currency keeps the business prices, converted at the switcher's rate. Nothing needs setting up in B2B.

Everything you save in B2B stays in the store currency: exact prices, price books and their amounts, cart discounts, purchase limits, business order values, company spending caps and approval thresholds, Pay on account credit limits, the targets of automatic group moves, and quotes.

What a business customer gets in another currency:

- Percentage discounts apply to the product's price in that currency (with WPML that includes prices you set per currency in WPML). Exact prices and amounts are converted at the switcher's rate: an exact price of \$60.00 is €54.00 at a rate of 0.9.
- Purchase limits, business order values and company caps count the cart at the switcher's rate: a €102.60 cart counts as \$114.00 against a \$100.00 limit. Their messages give the amounts in the store currency.
- An order placed in another currency keeps that currency and records the switcher's rate. Pay on account counts it in the store currency at that rate against the credit limit and in what the company owes; automatic group moves count it at that rate; sales reports keep each currency apart.
- Quotes are in the store currency. A quote can be accepted with the shop in the store currency: in another currency the buyer reads "This quote is in USD. Switch the shop to USD to accept it."
- In a currency the switcher has no rate for, with another switcher plugin, or with FOX without **Is multiple allowed**, business prices are not available and the customer reads "Business prices are not available in this currency. Switch the shop to USD to use your business account."

Retail customers are not affected: the switcher converts their prices as before.

Recover from pricing problems

Message or situation	What to do
Business terms changed while editing	Reopen the current audience/book, copy any intended unsaved changes and review again. The old form cannot overwrite newer terms.
Role review expired or changed	Return to the editor and create a new review; apply within 20 minutes.
Currency or currency precision changed	Review intended exact amounts, books and purchase limits in the current currency/precision.
Another active book uses the same priority/schedule	Change priorities, separate the schedules or pause one book.
Two equally specific rules match	Remove or consolidate overlapping category/product targets.
Bands do not cover all graduated units	Start at 1, count the exact product/variation, remove gaps and leave the final end open.
Percentage/amount rule has no base price	Set a regular/current base price or use an exact business unit price.
Fixed discount cannot preserve exact rounding	Change quantities or choose a percentage cart discount.
Product/account/role is unavailable	Select a current eligible record; use the approval or owning product workflow where needed.
CSV row or SKU is invalid	Use the exact exported header and correct the indicated row; provide either a file or pasted text.
Search did not finish	Retry or narrow the phrase. The current selection is retained.
Native search cannot retain an upload	Go back, complete searches, then select the file. No change was saved by that search.
Coupon type changed	Remove/re-add its book assignment with the intended amount; credit instruments are managed separately.
Quantity or amount violates purchase limits	Change eligible cart units/value according to the message. Product/global/budget/quote rules still apply.
Business purchase limits could not be verified	Refresh the cart or ask the store to review current limits and totals.
Order/cart price no longer matches	Recalculate and review the actual cart before proceeding.
Product-editor business records could not load	Refresh the product or open the complete B2B editors.

Review, selection searches, Add/Remove draft band controls and previews do not publish prices. Reverse a published change through its owning editor: publish corrected general/role/product terms, pause a book, remove a rule or restore a reviewed prior complete book version. Product updates and price previews do not undo published business terms.

Existing integration inputs

The same server operations support the normal forms and enhanced interface. Some integrations may submit compatible audience, SKU or band data through those existing operations; this does not create extra settings

you must find in the screen. Named audiences, product selectors and band rows remain the standard controls. Such integrations must preserve the current record, currency, permissions and review requirements. The technical transport map lists the exact supported inputs and responses.

Quotes and agreed offers

Quotes keep the buyer's request, private conversation, proposed prices and resulting order together. An inquiry is not an order. Each store offer and buyer counteroffer remains a separate version, so both sides can review exactly what changed. Your company role controls whether you can see a conversation, change it, or purchase the agreed offer.

Enable quotes and choose who can request them

The store's quote settings control whether quotes are enabled, whether guests can inquire, whether buyers can counteroffer and whether staff and buyers receive notifications. Guests are off by default. Before enabling guests, create or select a published public quote page. The default offer period is 14 days; the maximum is 180 days. Set the business name, quote heading, introduction, footer, email subject/body and six-digit brand color. Nested form, catalog, presentation and message settings retain their values when another settings form does not include them.

Quote policy can be set globally, inherited or overridden by a business group, and overridden again for a particular account. Enable or block new requests, require quotes for all eligible items, name products/categories that need quotes, or set quantity thresholds for one exact SKU or the whole basket. A threshold is exceeded only above its value: 100 units remain below a rule that requires a quote above 100; 101 units require a quote. Zero disables a quantity threshold; the maximum threshold is 2,000,000. These quote rules apply to approved business accounts and work separately from ordinary minimum, maximum and multiple-of quantity rules.

An account member needs the appropriate quote permission. Suspended members and accounts whose request policy blocks requests cannot submit. Without a business account, inquiry access depends on the guest setting. Guest links last 30 days and should be kept private. A guest link opens a conversation; it does not verify ownership of the supplied email address or grant business purchasing rights. Staff should verify an inquiry before linking it to an existing account. When staff link the inquiry to a business account, use the account's quote area thereafter because the old guest link stops working.

Start and follow a conversation

Give the request a descriptive title, add the products and quantities you need, answer the store's configured questions and explain any additional requirements. A request may contain up to 100 different exact products or variations, with quantities from 1 to 10,000 per row. Combine repeated exact SKUs into one row. A request without product rows needs a message. Use a published, visible ordinary product or exact variation eligible for quote requests. The title supports up to 160 UTF-8 bytes, and the message supports up to 6,000 UTF-8 bytes.

Registered buyers can submit up to 20 requests per hour; guest requests share a store-wide limit of 50 per hour. If products, options, company membership or the questions change while a request is open, refresh and review the form before sending it again. Repeating the same submitted request does not create a second inquiry.

The quote list shows 25 conversations per page. Connected applications can filter by status, title and unread conversations. A company role with company-wide access can see the permitted account conversations; other permitted buyers see their own. Guest inquiries are reached through their private link. Conversations show 25 messages per page. Sending a message accepts up to two private files; a file-only message is allowed. Store staff

can add a private note that the buyer cannot see and that does not generate a buyer notification (see [staff quote setup](#)). A conversation with 1,000 messages must continue in a new quote.

Messages with the store

Open **Quotes** → **Quote setup** → **Availability & limits** and tick **Allow messages with business customers outside quotes**, then review and publish. It is off at the start and works whether quote requests are on or off.

Approved business customers whose company role may request quotes (company owners, managers and buyers) then find **Message the store** on **Business quotes** and in the business portal. A message has a **Subject** (up to 160 bytes), **Your message** (up to 6,000 bytes) and up to two files (PDF, JPEG or PNG, 2 MB each); **Send message** sends it. Sending the same form twice sends one message, and a customer can send up to 8 messages an hour. Finance members read their company's messages as they read its quotes but cannot start one; retail customers and other companies cannot open them.

A message is a private conversation kept with the company's quotes: the list is headed **Your messages and quotes** and shows it as **Message • open** (or **Message • closed**). Both sides reply in the conversation with up to two files per message, as in a quote, and staff can add private notes. The store is emailed about a new message (**New message from a business customer**) when **Email the store about buyer updates** is on, and the customer about a reply when **Email buyers about store updates** is on; a customer can untick **Email me when the store replies** in the conversation. The customer closes a conversation with **Close conversation** (a box to confirm); staff close it on the quote desk with **Review closing the conversation**, then publish. A closing line, **Conversation closed.**, is added.

On the staff quote desk, the filter **Quotes or messages** shows only messages or only quotes, and a message's row offers **Reply to the message**. **Start a message to a company** (beside **Create a quote**) writes to an approved business account: choose the account, enter a subject and the message, review and publish; the company finds it under **Business quotes**, and its owner gets an email (**New message from the store**) when **Email buyers about store updates** is on. Under a message, **Answer with an offer (the message becomes a quote)** prepares an offer as on any quote; once sent, the conversation is a quote. Sales reports leave messages out of the quote pipeline.

Read proposals and manage their stages

Status	What it means
Draft	Staff have started an inquiry
Requested	The buyer has submitted a request
In progress	Staff are working on the inquiry
Offer ready	A store offer is ready for review
Counteroffer	The buyer has proposed revised item quantities or prices
Accepted for checkout	The proposal is accepted for the guarded checkout process
Order created	An order now owns the purchase
Declined	A proposal has been declined
Withdrawn	An inquiry has been withdrawn
Expired	The current proposal's deadline has passed

Staff can move an unissued inquiry between Requested and In progress, with a shared explanation. A request cannot be returned to Draft. Once an offer or checkout record exists, use the corresponding offer or checkout actions instead of queue status changes.

Review the exact products/variations, quantities, unit prices, currency, tax basis, expiry, delivery terms, additional terms and reference. Delivery may be a fixed quoted amount or an estimate to be confirmed at checkout. The quoted product subtotal excludes delivery and tax. Offers use the store's current currency and price tax basis and expire within 180 days. An old form whose store/product details have changed must be refreshed.

When enabled, a buyer can counter an unexpired Offer ready proposal by adding/removing ordinary product rows and changing item quantities and prices. Delivery, expiry, currency, tax treatment, reference and other terms remain the same; ask staff in the conversation to change those terms. For a licensed offer, request changes by message. The store then issues another immutable proposal version. Up to 200 proposals can belong to one quote; after that, start a new quote.

Buyers may withdraw Requested or In progress inquiries, and decline Offer ready or Counteroffer proposals. Staff may close the other open stages where no order is being created. Once an order exists, manage or discuss that order; create a separate replacement quote if needed. Expired and already closed quotes cannot be closed again. If another person changes the quote while you are reviewing it, reload and review the latest revision before acting.

Link an inquiry and control notices

Staff can link an unassigned inquiry to an existing business account before checkout begins. A registered inquiry must belong to that account's owner. The link changes the purchaser and contact email to the account owner and ends guest-link access. The conversation records the change. A quote's notification preference can be switched on or off by an authorized writer; the saved conversation remains available regardless of mail delivery.

Claim a reusable offer

The store can prepare an offer for all approved businesses, a business group or one account. Staff choose Draft, Active or Paused, an optional start time, expiry and overall/per-account use limits. Zero means no limit. Buyers can claim applicable active offers during their availability window. A claim reserves an individual quote until its expiry, preserving the offer's exact terms and presentation. Later changes to the reusable offer do not rewrite an already claimed quote.

The use limit includes completed purchases and current unexpired reservations. If all uses are claimed, the offer cannot be reserved again. Repeating the same claim does not create another reservation. The buyer still needs quote and purchasing permissions and must complete the quoted checkout checks.

Expiry and reminders

The deadline applies even if no background task has run: an offer displays Expired as soon as its expiry is reached. Recent expiries can generate a notice, without changing an existing checkout or order. The store does not send a backlog of historical expiry emails when notice handling is first enabled. Ask staff for a fresh offer when the deadline has passed.

Contact requirements and request questions

Under Contact and delivery requirements, provide Contact name, Business name, Contact phone, Requested billing details, and Delivery location and timing as needed. The first three fields allow 160 UTF-8 bytes each; billing and delivery allow 1,000. Optional proposed unit amounts are requests for negotiation, not agreed prices. Enter a nonnegative plain decimal up to 999999.999999, with no more than six decimal places; do not use a currency symbol, comma or scientific notation. The conversation's Original buyer requirements preserves these details and the currency/tax basis at submission. Confirm actual billing, delivery and the final total at checkout.

Store staff can configure up to 50 Quote request questions. For each question, set Question key, Label, Position, Example or placeholder, Field type, Help text, Choices, Default answer, Show this question, and Require an answer. Keys start with a lowercase letter and use up to 40 lowercase letters, digits or underscores. Position runs from 0 to 10,000; tied positions sort by key. Disable a question to keep its definition for later, or select Remove definition after review to delete its current definition. Existing quotes retain the original questions and answers.

Supported types are Text, Long text, Email, Telephone, Website, Number, Date, Dropdown, Single choice, Checkbox, Multiple choices, Consent checkbox, Heading and Explanation. Choice questions support up to 30 choices, one per line; multiple-choice defaults also use one per line. Consent is never preselected. File attachments use the separate message controls, rather than a question type. Headings and explanations display information without accepting answers. Long answers allow 4,000 UTF-8 bytes; other single answers allow up to 1,000 as validated by the form. Use a valid email, an HTTP/HTTPS website, an actual calendar date, or a plain number with at most six decimal places. Select only offered choices and complete all required questions.

Set After submission to the acknowledgement text and optionally choose a confirmation page. The destination must be a published, unrestricted page on the same site, without a password. Choose Stay on the private quote to keep the default flow. Guests always stay on the private quote so they retain their access link. If questions change while someone is filling the form, they must refresh and review their answers before submitting.

Add, edit and import products

Use Find products or variations, enter a name or exact SKU, and choose Search products. Up to 50 eligible matches appear; narrow the search if needed. Choose Add product, enter its quantity, and use Remove to delete a row. Re-adding a SKU already present does not duplicate it. These actions retain the draft and do not publish it. Staff offer editors add Proposed unit amount and show Line amount and Proposed merchandise. Buyers may supply Your unit-price proposal (optional) in a request.

Paste a bulk SKU list supports one SKU, quantity per inquiry row, or SKU, quantity, unit amount for a priced proposal. Put a SKU containing a comma in CSV double quotes. Import into editable rows replaces the current rows, supports up to 100 exact SKUs and accepts a paste up to 65,536 bytes. Product changes or unavailable variations must be corrected before submission. Visible automatic subtotals assist editing; final tax and delivery are confirmed during review and checkout. Search, add, remove and import remain native form actions when browser enhancements are unavailable.

Set product quote buttons and hidden prices

In Product quote actions, set Default quote button and Quote basket label, then choose registered menu locations for a basket shortcut. The basket can also be placed in a shortcode block with `[affstackdev_b2b_quote_basket]`. Its contents and count belong to the individual visitor.

Configure up to 25 rules. Rules are checked from top to bottom, and the first matching rule wins. Edit and save one rule before opening another. Use Find products, categories, groups or customers and Update named choices to refresh choices without discarding the draft. Set Rule name and Enable this rule, then Products covered: all ordinary products, selected products/variations, selected categories, or native product brands where the store provides them. Select any Variations excluded from this rule. An exclusion skips that rule and lets later rules or the normal default apply.

Choose Who uses this rule? as everyone permitted to view the product, or selected visitors/customers. Selected audiences can combine Customer roles, Approved business groups, Specific customers, Include guests and Include registered retail customers. Customers excluded from this rule are skipped. Existing catalog access continues to apply; quote settings do not reveal hidden products.

Product action	Result
Buy or request a quote	Both ordinary buying and quoting are available where other permissions permit
Quote required before purchase	The product must enter a validated agreed quote before purchase
Replace purchase with a custom link	Uses the configured local destination instead of ordinary purchase or quoting
Use normal purchasing; disable quoting	Keeps the ordinary purchasing path and removes quoting

Set Button text, Show quote action on (product, catalog or both), Hide ordinary public prices for this audience, and Text in place of price. A blank button label uses the default. A custom action requires both a label and the local homepage or a published unrestricted post/page on this store, with the same scheme/host/port and no query string or fragment. Remove this rule when settings are saved deletes it after saving. To disable quoting for a particular option, use an appropriately placed specific rule with normal purchasing and quoting disabled; excluding the option from another rule merely falls through.

Hidden prices are also removed from supported product data and structured offers. With active rules, aggregate price filters and the standard price-filter widget are unavailable; browse products directly. If a native brand rule cannot be checked, buying, quoting and pricing remain unavailable until the store resolves the brand configuration. Licensed products retain their separate quote process.

On supported browsers, a catalog quote button may open a private request dialog. Close returns focus to the button and keeps the unsent form available. Open the complete quote page uses the full form. If you select another product while an unsent dialog exists, save or submit that request first. Variable products require an exact variation and a valid quantity before the quote control appears. If the dialog cannot load, the full quote page opens automatically. Products that newly require a quote cannot be purchased from an old ordinary basket; remove them or request a quote.

Attach and download private files

Attach up to two PDF, JPEG or PNG files per message, each up to 2 MB. A quote can hold ten files altogether. Keep filenames short (up to 160 bytes). The file contents must match the extension; export a fresh file if validation rejects it. If an upload did not finish, choose it again and ask the host to check upload limits if it keeps failing.

Files remain in the private conversation. An attachment to an internal staff note is visible only to staff. Open downloads from the current private quote page so the access link is current. If a download is unavailable or

cannot be verified, contact the store; there is no public file URL or quote-file deletion control. Each issued proposal also has its own versioned PDF download.

Brand and preview quote documents

In Quote documents and price display, select PDF layout: Classic — clear business letter, Ledger — compact item detail, or Studio — bold brand panel. Choose No logo or a Local logo image uploaded under Media. The selector includes the latest 50 JPEG/PNG images plus the selected logo. Use a local JPEG/PNG up to 512 KB and 1600 × 1600 pixels; the server prepares a smaller private copy for each new proposal. If image processing fails, choose another image or continue without a logo.

Show permitted standard reference prices is off by default; Show quoted prices and merchandise totals is on. Set Standard-price label, Quoted-price label and Tax heading (up to 60 bytes each). Reference prices are the product's regular prices only where the buyer may see them; unavailable or hidden prices are not exposed. Hiding proposed prices removes them from the offer summary and document display. The agreed amounts still determine checkout, and the separate payable-total review shows what the purchaser must accept.

Save settings, then choose Preview saved PDF settings to view an example. The preview is not an offer and creates no order or payment. Existing issued documents keep their saved branding, logo, labels and permitted reference prices. Issue a new revision to apply later changes.

The PDF records the proposal version, buyer, products, quantities, prices selected for display, currency, tax basis, expiry, delivery terms and agreed terms. It is not a tax invoice or payment receipt. Quotes do not reserve stock; final tax, delivery, availability and payable total are checked before checkout. A PDF supports up to 40 pages. If text cannot be rendered by its bundled font/layout, a logo is invalid or an amount is too wide, use the private quote page or ask staff for an alternate document.

Configure quote emails and review delivery

Choose staff and buyer notifications separately for each event: follow-up due, expires within two days, requested, issued, revised, buyer reply, store reply, counteroffer, accepted, declined, withdrawn, expired, order created, assigned and status updated. Store-wide switches and the buyer's per-quote preference still apply. Internal notes are never inserted into these emails.

By default, staff receive follow-up, request, buyer reply, counteroffer, acceptance, decline, withdrawal, expiry, order-created, assignment and status notices. Buyers receive request, issue, revision, store reply, acceptance, decline, withdrawal, expiry, order-created and status notices. The expires-within-two-days reminder is off for both audiences until enabled.

Enter one to five Staff email addresses separated by commas, using addresses without display names. Each event has Staff and Buyer switches, Subject and Message. Supported placeholders are {brand}, {quote_id}, {title}, {event} and {quote_url}. Subject permits 200 bytes; message permits 4,000 UTF-8 bytes, with the saved footer added afterwards. Attach the exact issued PDF to buyer issue and revision notices is optional and off by default. Other notifications contain the private link without an attachment.

Save settings before using Preview and test quote email. Select Event, then Preview saved message or Send example to my login email. The example uses sample data, has no attachment, and is sent only to your own login email. Wait one minute between examples. Previewing does not send mail.

Recent quote email results shows the latest 20 results. Queued waits for processing; Claimed by mailer worker is in progress; Accepted by mailer still needs inbox confirmation. Suppressed by current access or preferences means the recipient, access, preference or proposal changed. Attempts exhausted means staff should review

mail or PDF setup. Uncertain result requires review before any manual resend because a message may already have been sent; the system does not automatically resend it. Definite failures receive up to four attempts, subject to the site's scheduled-task timing. A mail failure does not delete the quote.

Recipient access is rechecked at send time. Changed staff recipients, changed account ownership/email, revoked membership, expired guest links, turned-off preferences or a superseded proposal can suppress a queued notice. Attachment delivery also needs private temporary storage on the server. If that storage or PDF generation is unavailable, use the quote's private PDF download while staff review the configuration.

Organize the staff quote desk

Use Quote, business or email, Status, Responsible staff, Business account, Created from, Created through, Unread buyer updates and Follow-up due to filter the inbox. Find a business account refreshes named account choices after filtering. All accounts includes unlinked requests; Requests without a business account shows only those inquiries. Responsible staff includes Unassigned. Created dates use the site's displayed time zone. Clear filters restores the full desk.

Each row shows the inquiry, contact, creation time, status, suggested next step, unread buyer update indicator, responsible staff, follow-up and expiry. Open the quote to act. Assign a Responsible staff member who can manage this store; assignment organizes work and does not grant extra customer-account access. Set Follow up at (UTC) to a future time within one year, or leave it empty to clear it. Closed quotes cannot receive a new follow-up. The change is recorded as an internal note.

Follow-up reminders go to the configured staff recipient list, even when the quote has an assigned staff member. A reminder is tied to the current proposal and follow-up time, so changing either prevents stale reminders. An optional offer-expiry reminder covers the final two days. Enable its audience switches in email settings if needed. Turning reminders on later does not replay reminders already observed while the switches were off.

Use the quote basket and private workspace

Signed-in buyers open My account → Business quotes. A store may also publish its own Business quotes page. The workspace links to Browse products and, where permitted, Business portal, Quick order and View cart. Your quote basket is separate from the shopping cart and does not reserve stock.

Enter What is this quote for?, products, Contact and delivery requirements, the configured questions and What else should we know?. Guests also enter Your email. Save quote basket stores an unsent draft; Send quote request starts the conversation. Choose Attachment 1 and Attachment 2 only after finishing draft edits because saved drafts do not retain uploads. A product chosen from the catalog appears in the displayed basket but is kept only after saving or submitting. A catalog link to an existing SKU increases the displayed quantity; the editor's Add product simply avoids adding the same SKU twice.

Under Copy items from another workspace, choose Copy shopping cart to quote basket or, for approved accounts, Copy working quick-order list. Confirm Replace the existing quote basket when required. Copying replaces only the destination quote rows and keeps the source. Managed items or extra product options that cannot be expressed as an exact SKU prevent the whole copy; nothing is partially copied. If the cart, working list or quote basket changed in another tab, refresh and review before trying again. Empty sources cannot be copied.

Native request forms allow eight requests per user/IP window and message forms allow 30 messages per quote/user/IP window, in addition to the store's broader request limits. If told to wait, allow the window to

expire before retrying. Refresh an expired quote session. Repeating a completed submission returns the same quote. After submission the product/title/message/answer draft is cleared for a new request.

Revision history opens each preserved store offer or buyer proposal. Download this revision as PDF downloads the selected version. Historical views require Open current revision before an action. Propose different quantities or prices requires confirming that your proposal replaces the current offer until the store replies. Decline quote and Withdraw request each require their displayed confirmation. In Messages and files, use Your message and Send message, then Email me when the store updates this quote and Save email preference as needed.

When offers are available to your business, open the offer and choose Claim and review this offer. A claim is a reservation to review, not an order. When an order already exists, use View the order for this quote and, if payment is still needed, Pay this existing order. Remove this quote from my cart removes its loaded rows; it does not cancel an existing order. Licensed offers remain with their original purchaser and removing one does not release its protected purchase reference.

Staff quote setup and publishing

Conversations, Reusable offers and Quote setup are the staff tabs. In Quote setup, work through Availability & limits, Products & quote buttons, Request form, Branding & documents and Messages. Review and publish each section's changes. Other sections keep their saved settings. If a form is reported incomplete, reload it; repeated failures can require a higher host form-input limit. If store settings or the quote changed while editing, reopen and review the current version.

Create a quote opens Start a quote for a customer. Choose a Business account or leave it unselected and enter Guest email, then add Quote title, product rows, request-question answers and Opening message to the buyer. Create the conversation first, then Prepare the next offer. Review the item/unit amounts, Offer expires (UTC), Delivery price, Agreed delivery amount, Delivery description, Customer reference and Quote terms shown to the buyer before publishing. Fixed delivery is before tax, supports one shipping package, and accepts zero for free delivery. A newly published revision replaces an unconverted offer and requires buyer acceptance again.

Conversation status offers Awaiting review and In progress for unissued inquiries, with Status update for the buyer. Review withdrawal closes an eligible open quote. Link this inquiry to a business account requires verifying the account first and ends guest access. Responsible staff and Follow up at organize the desk. Initial-license offers have a separate preparation control for linked account purchasers; review its verified price basis, included licenses and effective deadline in the licensing workflow.

For guest access, Public quote request page lets you choose a published page containing [affstackdev_b2b_quotes] or Create a new business quote page. Creating/selecting requires page-publishing permission. Then enable Allow guest inquiries. Open quote page checks the selected destination.

In Reusable offers, use Create reusable offer and set Offer name, Availability, Available to, the appropriate Business group or Business account, Available from (UTC), both claim limits and the proposal terms. Leave the start empty for immediate availability. Pausing prevents new claims; it does not rewrite claimed proposals. Converted orders continue to count against claim limits even if later refunded.

Under **Messages and files**, staff write in **Message to buyer or private staff note**, attach up to two PDF, JPEG or PNG files (up to 2 MB each, ten per quote) and choose **Send message**. The buyer sees the message and its files on the private quote page and gets the *Store replied* quote email, which is on at the start. Tick **Private staff note — buyer cannot see this message or its files** to keep a note for staff only; it sends no email. Sending the same

form twice saves the message once. An authorized integration can also send a staff reply or internal note through the authenticated quote API, without attachments.

Connected quote applications

Authorized applications can list/read quotes, submit ordinary requests, send text replies, prepare/review/publish ordinary staff offers, send confirmed buyer counteroffers, close eligible quotes, and update staff responsibility or queue status. They must authenticate as a site member and follow that user's access. Guest private links are not API sign-in credentials. The technical API reference provides exact routes, fields, pagination and review tokens.

Applications use the current quote revision and form definitions. If a quote, question or settings value changed, refresh before resubmitting. Staff offer publication requires an exact preview within 15 minutes. Requests and replies through this API do not upload attachments, and it does not perform acceptance/payment or claim reusable offers. Those steps remain in the private quote workspace. A rate-limit response means the application must wait before sending more changes.

Accept the exact offer and check out

An approved purchaser with permission to change the quote can accept the current unexpired store offer. A buyer counteroffer must first receive a store response. Tick I accept this offer revision and its terms. Load it into my empty cart to review the final total, then choose Accept offer and review checkout.

Save or finish other shopping-cart purchases first. One checkout must contain the complete quoted basket only. Do not add unrelated products, remove part of the quote, change quantities or change variation options. If that happens, reload the exact accepted quote from Business quotes. Agreed unit amounts replace normal business pricing for this whole quote.

The store rechecks product availability, options, stock and sold-individually limits. Stock shared by variations is checked together. If a product cannot be loaded, the previous cart contents are restored; reopen the same accepted quote and correct the issue with staff. An accepted inquiry can remain saved even when basket loading fails. If another company buyer already accepted it, ask staff to review before changing purchasers. Licensed quotes remain with their original purchaser.

Review delivery and the payable total

In Review the payable total, use Edit billing address and Edit delivery address to set the intended details. Choose an available Delivery package option for each package and select Update delivery and total. Fixed quoted delivery requires one shipping package and is entered before delivery tax; estimated delivery uses current store options.

Check Total payable, Tax included in total, Delivery before tax, applied credits/coupon codes and fees. Tick I reviewed this total, the quoted items and these delivery details, then choose Accept total and continue to checkout. This is separate from accepting the offer prices. If tax, delivery, addresses, Store Credit, coupons, fees or any other recorded total changes at checkout, return to the quote and accept the new review before continuing.

If fixed delivery produces no usable rate or the cart has multiple packages, ask staff to review the offer's delivery terms. If currency or the store's input-tax basis changed, staff must issue a reviewed replacement offer. The quote's expiry still applies until conversion creates the order.

Existing orders and interrupted checkout

Checkout creates one linked WooCommerce order after verifying that the saved order, addresses and totals exactly match what you accepted. When the quote shows Order created, use View the order for this quote or Pay this existing order. Do not try to claim/create a second order to repeat payment. A quote conversion means an order exists, not that payment has succeeded.

If a saved order's prices, addresses, ownership or quote evidence changed, payment is blocked until staff provide a reviewed replacement. If Store Credit was added after the checkout attempt started, return to the quote, review the new total and restart the checkout flow. Unsupported replacement order-creation workflows or nontransactional database tables can prevent quote checkout; staff/hosting support must restore the supported WooCommerce/InnoDB configuration.

Remove this quote from my cart removes only its loaded quote rows. It does not cancel an order, undo acceptance, refund payment or automatically return a reusable-offer use. For licensed offers, removing the cart also does not free the protected purchase reference. Ask staff for a newly reviewed quote if a new cart/reference is needed. The remove-cart control can remain available when quote writes are held.

Store Credit and licensed checkout recovery

Where the connected financial/licensing services support it, quote order creation and their reservations share one database transaction. The same purchaser, store, order and accepted reference must stay in effect. Missing participant support or changed ownership/reference stops checkout before a partial conversion is committed. If Store Credit transaction support is unavailable, remove Store Credit and review the quote total again, or ask the store to resolve the connection.

An interrupted database connection can leave the outcome uncertain. If the message says it cannot confirm whether the order finished, reopen the saved quote and have staff check the original order and credit reservation before retrying. Do not assume payment/reservation was cancelled. If a draft cannot be saved after interruption, reload the authoritative order instead of continuing from the stale checkout page.

Repeated payment notifications

A repeated completion notification for an already paid quote checks the original persisted order and settlement evidence. It does not create a second order or authorize another credit debit. If the order changed or cannot be verified, staff must review the original order before another payment attempt. This verification supports WooCommerce's native order stores; a custom replacement storage implementation can require returning to the supported store configuration.

Business sales and quote reports

Business sales and quotes uses the accepted business classification and account/group details captured when an order was accepted. Changing an account today does not reclassify its earlier orders. Older orders may have verified business status but no recorded group. Unverified or unclassified orders are shown separately instead of being guessed into business revenue.

Build, pause and refresh a report

Set Orders and quotes created from and Created through, then choose Build fresh report. The default is the current month through today. Dates use the store time zone and include the whole end day. Choose at most 366 days. Reports read up to 100 records per batch; totals appear after all batches finish.

Use Continue building report for one batch, or Finish remaining batches to continue automatically where supported. Pause after this batch stops after the current batch. You can leave and return to the private report within one hour. If another tab advanced it or a batch failed, reload its latest progress before continuing. Expired reports must be rebuilt.

One report supports up to 10,000 orders, 10,000 quote conversations, 20,000 order lines and 12 MB of snapshot detail. An individual order can have up to 200 items and 200 refunds for this report. If a limit is reached, choose a shorter interval; an incomplete partial total is not published. Orders edited or deleted during the build can affect coverage, so rebuild if the system detects a changed count and use a quiet period when reconciling.

Understand the sales figures

Coverage states how many accepted business orders were included and how many consumer or unclassified orders were excluded. Each currency is separate. Business orders includes unpaid orders; Paid orders counts paid orders and refunded orders with a recorded paid date. Pending, on-hold, failed, cancelled and checkout-draft orders stay in counts/drilldowns but do not contribute paid sales under the native payment rules.

Verified net merchandise sales uses line totals after ordinary discounts, less itemized merchandise refunds. Tax, delivery and fees are separate. An amount-only refund cannot be assigned to a product, so remains in Native refunds on paid orders. For example, 100.00 merchandise with a 20.00 itemized refund produces 80.00 net merchandise; an additional 5.00 amount-only refund increases the native refund figure without assigning that 5.00 to a particular product.

Verified original Store Credit allocation is added back to merchandise because credit pays for the order; it is not another trade discount. If a 100.00 item has a 70.00 post-credit total and a verified 30.00 original credit allocation, reported merchandise is 100.00. Credit orders with refunds, missing allocation evidence or unsupported combinations need reconciliation. They remain in order counts but are excluded from all monetary totals and rankings. The screen tells you how many are excluded and identifies the remaining figures as a verified subset, not complete business revenue. Check affected rows in the order CSV and native order records.

Average verified merchandise order divides the verified net merchandise total by the paid orders actually included in the money calculation. Top business customers, Top business groups, and Top products and variations show the leading 20 by net merchandise for each currency. Customers/groups show order count; products show units after itemized refunded quantities. Select a ranking name for the matching order drilldown. The drilldown can include matching unpaid or excluded records as well as those contributing to the ranking; read each row's Historical audience and reconciliation label.

Review quote conversion and export

Quote pipeline shows conversations created, how many received an offer, how many created an order and the percentage converted. Draft conversations are included. Conversion means an order was created, not that it was paid. View quote conversations opens the individual quote histories; Order drilldown links to native orders. Both use 50 records per page.

After completion, choose Download dataset as Orders including classification and exclusions or Quote pipeline, then Download CSV. The file contains the saved report snapshot and includes classification/evidence so excluded records remain visible. Monetary values use six decimal places. Reconciliation rows leave the uncertain merchandise/credit fields blank. Formula-like text receives a protective apostrophe for spreadsheet opening.

The selected interval is based on when orders and quotes were created. Refund figures reflect refunds observed while building, including refunds made after the end date. This is an order-cohort report, not a refund-date or

bank-reconciliation report. Read How these figures are calculated and the Finished time; use Build fresh report when you need current observations after orders change.

Your business portal and company role

Open **My Account → Business portal** to see your company, business group, account status and current purchasing terms. Your company role controls which actions appear; it does not give you access to WordPress administration.

Role	What you can do
Company owner	Buy, request and manage company quotes, view company orders, use lists/addresses, manage employees and managers, and configure company spending controls.
Company manager	Buy, manage company quotes, view company orders, use/edit shared lists and addresses, and manage buyers and finance members. Managers cannot manage other managers or configure company spending controls.
Buyer	Buy, manage your own quotes and lists, use shared company lists/addresses, and view your own orders.
Finance (view only)	View company orders and quotes. This role does not buy, pay, negotiate quotes or manage employees.

Your company must be approved and your membership active to use business purchasing. A pending owner may still have ordinary retail access where the store permits it. A suspended membership prevents business actions. Store staff can help with company records, but viewing a colleague's order does not let you pay, cancel, reorder or download their purchased files as that colleague.

Company team workspace

Open **My Account → Company team**. The page shows your company and role, **What each role can do**, **Purchasing controls and requests**, the permitted employee controls, **Shared company addresses** and company orders. Store staff reach the same company management area through **B2B Accounts → Manage company team**. Choose the company first if no company has been selected.

An owner can manage managers, buyers and finance members. A manager can manage buyers and finance members. The owner's membership cannot be removed, suspended or assigned a different role here; there is no ownership-transfer control in this workspace. Team changes use the version of the company shown when the page opened. If someone else changes it first, reload and review the latest information before saving again.

Invite an employee

Enter the person's email, choose **Company manager**, **Buyer** or **Finance (view only)** and send the invitation. Buyer is the initial role. Only the owner or store staff can invite a manager. Use the email the person will sign in with; the invitation cannot be accepted using another address. Email is limited to 100 bytes, which can be fewer than 100 characters for some scripts.

A company can have 100 members including its owner, 50 current pending invitations, and 100 invitations created in any rolling 24 hours. Suspended employees still occupy member spaces. A person already attached to

a business account cannot be invited into a second one. A pending invitation for the same email must be cancelled before sending a replacement.

The invitation email names the company and role and provides a link valid for seven days. If you already have a login, sign in using the exact invited email and reopen that link. If you need a login, use the invitation's account setup option, check your email, finish setting up your login, sign in and reopen the original invitation. Account setup does not itself join the company. The setup request is limited to five attempts per hour for that invitation and connection; wait before retrying if it is limited. An existing email is directed to its existing login rather than creating a duplicate.

Review the invitation, select its confirmation and accept. Acceptance checks that the company is still approved, there is space, and the inviting person still has permission. A cancelled, already accepted or expired invitation cannot be reused. Ask an authorized company manager or owner for a replacement. If your login already belongs to another company, ask the store to resolve that membership first.

When the store reports that mail was accepted, this means its mail service accepted the message, not that it reached the inbox. If sending fails, the pending invitation remains. Correct the email-delivery problem, cancel that invitation, then send a replacement; there is no resend control for the same token. Check junk mail before requesting another invitation.

Change or remove employee access

Under **Change permissions or remove**, choose the employee's Role and Access (**Active** or **Suspended**), confirm and choose **Save permissions**. Suspension preserves membership and can be reversed by setting Active. Any permission change cancels pending invitations previously sent by that member, so issue fresh invitations under current authority if needed.

To remove access, use the separate confirmation and **Remove employee**. This removes company membership, not the person's WordPress login or historical company records. A removed person needs a new invitation to rejoin. Removal also cancels their pending invitations. Deleting their site login or removing that login from the site also triggers removal of applicable company access.

The roster is a bounded company list, without a separate search or pagination control. A manager cannot modify an existing manager or promote a buyer to manager. If a control is absent because of your role, ask the owner rather than attempting the action through another employee's session.

Shared company addresses

Owners, managers and store staff can maintain up to 25 shared addresses. Approved members can read them, and buyers can apply them to their own billing or shipping address. Personal addresses are not automatically copied into the shared address book.

Each address needs an **Address label**, first and last name, address line 1, city and country. Company, address line 2 and postcode may be left blank. Where the selected country has a defined state/province list, use its valid state code. The label allows 120 bytes; the address fields each allow 100 bytes. Countries must be supported by the store. These shared records do not include an email or telephone field; complete any additional checkout requirements separately.

To reuse an address, choose **Use for → My shipping address** or **My billing address**, confirm **Replace my selected saved address with the company address shown above**, and apply it. This saves the address to your personal account, not only the current checkout. Shipping must be to a country the store ships to. Review checkout after

applying it; an existing quote acceptance or purchase approval may need renewed review because the exact address changed.

Edit the personal address or apply another shared address to reverse a mistaken replacement. Editing/deleting a shared record does not rewrite old orders or personal copies already applied. If a shared address changed while you had the page open, reload its current version before applying it. Store staff can manage the shared book but do not apply a customer's address to their own staff session on the customer's behalf.

Viewing company orders

The Company team order list shows recorded business orders, with order number, placing employee, status and total. Owners, managers and finance members can see company orders; buyers see their own. Use **Newer orders** and **Older orders** to browse. Each page shows up to 20 permitted records and may contain fewer if an order was removed or is no longer visible. This list does not automatically pull in every purchase made before company-order recording began or turn old retail orders into company orders.

Open an order number for its ordinary WooCommerce details. Only the original buyer with current purchasing permission and the usual order permission can pay, cancel or reorder it. Download rights stay with the original purchaser. If an employee can no longer pay a pending order because their membership changed, ask the store to review it. Do not use a colleague's payment link or account.

Company spending controls

Open **Company purchases** or follow **Purchasing controls and requests** from the team page. The owner or store staff can use **Edit company controls**. Controls initially are Off. Managers can review eligible purchase requests, but cannot change these controls.

Field	How to use it
Controls	Choose Off or On. When on, checkout applies the spending and approval rules.
Per-order merchandise cap	Highest counted merchandise amount permitted in one order. Blank means no cap; zero permits no positive merchandise amount.
Monthly merchandise cap	Highest counted merchandise amount permitted during a UTC calendar month. Blank means no cap.
Buyer approval above	Blank means no approval threshold. Zero requires approval for every buyer purchase. A positive value requires approval only above that value.

Use nonnegative amounts with a decimal point if needed, no commas/currency symbols/signs, and at most six decimal places. The maximum is 999999999.999999. Confirm and choose **Save company controls**. The current store currency is recorded by the save; if the store changes currency, review and save the controls before business ordering continues.

Employee limits supplies the same three amount fields for each current member. Save one employee form at a time. An employee's order/month caps add restrictions to the company caps; they cannot give the employee extra company budget. A filled employee approval threshold replaces the company threshold for that employee. Leaving it blank uses the company threshold. Clear all three fields to remove that employee's additional settings. Owners and managers do not need purchase approval, but their order/month caps still apply.

The counted amount is merchandise before coupons, excluding tax, shipping and fees. It counts placed orders recorded while controls are on. Unpaid, cancelled and refunded orders remain counted for their month; refunds do not automatically replenish this allowance. Approval alone reserves neither budget nor stock. These figures are purchasing limits, not money in a customer wallet or a payment balance.

For example, if the company has 2800 remaining and the employee has 600 remaining, a merchandise amount of 650 is refused; 600 fits both caps. With an approval threshold of 500, 600 needs approval, while exactly 500 does not. Applying a coupon does not reduce the counted merchandise amount.

Company-order readers can see the company's counted total; other buyers see their own total and relevant limits. A policy change makes earlier approvals need review. Turning controls off does not erase already recorded spending, and turning them on establishes a new enablement time for handling previously untracked orders. Ask the store to review any unexpected spending/currency error; do not assume cancellation resets it.

Requesting and reviewing a company purchase

Build your cart and set its billing and delivery details in checkout first. In **Company purchases → Review your current cart**, check every product, option, quantity, merchandise amount, checkout total and address. Supported approval carts contain 1–100 ordinary simple-product or native-variation rows. Bookkeeping that Store Credit, Dynamic Pricing or Free Gifts & BOGO record on a line does not count as an option. Items with additional managed options may require their own product or quote workflow; ask the store when directed.

When approval is needed, enter a **Purchase reason** of up to 1000 bytes, select the confirmation for the exact items and addresses shown, then choose **Request approval**. A reason is required. This shares the recorded cart details with authorized company reviewers; it does not place an order or reserve stock/budget. Your current cart remains where it is. If an identical current request is already pending, use the link shown rather than creating another. Each buyer can create at most 50 requests in a rolling 24 hours.

Approval applies to the exact reviewed cart and terms. It expires after seven days, or earlier when the UTC month ends. Changes to products, quantities, options, prices, addresses, company terms, membership or reviewer authority can make it need review. Keep the intended cart and return to checkout after approval; the request does not recreate it automatically.

Owners and eligible managers may review requests, but no one may approve their own. Managers cannot approve another manager's or the owner's request; a company owner can review another eligible purchaser's request. Authorized store staff can review another person's request. The reviewer must still have authority when checkout uses the approval.

Action	When it is available
Approve purchase	An eligible reviewer approves a pending request after current terms and budget checks.
Reject purchase	An eligible reviewer refuses a pending request.
Revoke approval	An eligible reviewer removes an approved request's permission before it is used.
Withdraw request	The original requester with purchasing access withdraws a pending or approved request.

Choose the **Decision**, enter the required reason of up to 1000 bytes, confirm and choose **Save decision**. These actions retain the historical request. Withdrawing/revoking does not undo an order already placed. If the page changed in another tab, reload before deciding. Expired or changed terms require a fresh request rather than editing an old approval into a different purchase.

Company purchases screens and email

Purchasing limits shows whether controls are on, relevant caps/thresholds and this month's counted merchandise. **Review your current cart** shows whether approval is unnecessary, already approved or awaiting review. Use **Return to checkout** to continue normal checkout.

The request queue offers **All requests**, **Awaiting review**, **Approved** and **Order placed**. Each page has up to 20 requests; use **Newer requests** and **Older requests**. Rows show the request ID, current state, requesting employee and budget amount. A row can say expired or needs review even within an Approved filter because terms are checked again when displayed. Request detail shows its UTC expiry, captured cart, purchase reason and decision reason. Once an order uses the approval, the request links that order and payment/details belong in Orders.

New requests notify currently authorized active owner/managers. Decisions notify the requester. Messages use **Company purchase request update**, identify the request and status, and link to a signed-in review page. Mail is attempted after saving; a missing email does not mean the save failed. Check the request page for the current state. Messages do not guarantee delivery or provide an automatic retry queue.

Checkout, payment and recovery

Checkout checks current company limits and any required exact-cart approval again. This applies to the ordinary checkout and Checkout Blocks. Address/cart updates may be made before final submission, but the final order must match its authorization. A newly placed controlled order records its counted merchandise once and marks the used approval **Order placed**. A failed or altered authorization prevents payment and requires a fresh review or store assistance.

If an order was created but still needs payment, use that order's existing payment link in **My Account → Orders**. Creating another checkout cannot reuse its consumed approval. Do not pay a changed order as though the original cart approval still covered it. The store can investigate order identity, price or address discrepancies.

Cancelling, refunding or failing to pay does not automatically return the counted amount to the monthly allowance. An older order created before current controls were enabled may retain its existing payment workflow. An unfinished draft or newly created order without the required company authorization cannot proceed merely because it has an order number.

Payment and delivery permissions

Store staff can select permitted payment gateways and shipping methods in business defaults, group terms and account exceptions. These selections restrict the choices WooCommerce otherwise makes available; they do not activate a disabled gateway, add a shipping rate or guarantee a method for every destination.

Permission	Effect
Use inherited terms	Take the next applicable company/group/role/default rule. Available above the defaults.
Allow all available methods	Allow all methods that are actually available for the order.
Allow selected methods	Allow only the checked named methods; select at least one.
Do not allow any methods	Allow none of that type, which may prevent checkout until terms change.

An explicit account rule takes priority, then an explicit group rule. Otherwise applicable customer-role rules are combined so only mutually permitted choices remain. Business defaults apply when no explicit role rule participates. An explicit **Allow all** at account/group level overrides narrower lower-level rules. Shipping selections may refer to one zone/rate or all available zones for a named method; select the intended scope.

Customer-role method rules allows up to 25 distinct supported customer roles. Use its blank row to add another role, select each role's payment/shipping permissions, or choose **Remove this role rule**. Staff roles cannot be newly added. A role or method no longer available can appear as unavailable/retained so an existing restriction is preserved; an inactive role does not apply until it is a current permitted customer role again. New selections must be enabled native choices. If there are no enabled choices, configure them in WooCommerce first.

For buyers, current terms explain permitted names, but checkout still checks currency, address, products and other native restrictions. If no payment or shipping option remains, ask the store to review company terms and ordinary checkout availability. A malformed stored method policy requires review and does not silently remove its restrictions. Detailed precedence and identifier contracts are in the technical method reference.

Pay on account

Pay on account lets approved business customers order now and pay later by invoice. An order placed on account takes no payment: it gets a due date from the company's payment terms, can carry a purchase order number, and counts against the company's credit limit until you record the payment in B2B. No money passes through B2B; you collect the payment your usual way (bank transfer, cheque).

Switch it on and choose who may use it

1. Open **WooCommerce → Settings → Payments → Pay on account (B2B)** (B2B → **Accounts receivable** links there) and tick **Offer Pay on account to the business accounts allowed in B2B**. It is off at the start. Set its **Title** (default "Pay on account") and **Description** for checkout, the **Instructions** that tell customers how to pay (for example your bank details; they appear on the thank-you page, in the customer's order emails and in the reminders), the **Order status after ordering** and the **Purchase order number** field.
2. In B2B → **Accounts receivable**, under **Who may pay on account**, choose whose terms to set (all approved businesses, a business group or one account) and **Open these terms**. Choose **Allow Pay on account**, enter the **Payment terms (days)** (for example 30 for Net 30; 0 means due on receipt; up to 365) and the **Credit limit**, then **Review changes** and **Publish these changes**.
3. If **Purchasing → payment methods** limits a group or account to selected methods, add Pay on account to its list; otherwise it stays hidden for them.

Account terms come first, then the account's business group, then the business defaults; the whole set (allowed or not, days, limit) comes from the first of them that is not **Use the inherited terms**. The business defaults start at **Do not allow Pay on account**, so nobody can use it until you allow it. With terms on a group, each company in the group has its own limit. The credit limit is in the store currency, with no more decimal places than it uses (5000 or 4999.99); leave it blank for no limit. If the store currency changes, a limit stops working until you review and publish it again.

Who sees it at checkout: approved business accounts whose terms allow it, and of those only the members who may place orders (company owners, managers and buyers; not finance members), while B2B's license is active. A suspended account does not see it.

Order status after ordering: On hold (the default) waits for you: ship once paid, or change the status yourself. **Processing** lets you ship at once and collect by the due date; WooCommerce then records the order as paid in its own records, but B2B keeps counting what is owed until you record the payment. **Purchase order number: Do not ask, Ask, optional** (the default) or **Ask, required**, with the field's label; up to 80 characters.

Order on account

At checkout (the block checkout and the classic checkout) the customer chooses Pay on account and reads the description, the payment terms with the due date of an order placed today ("Payment terms: 30 days. An order placed today is due by November 21, 2026." or "Payment is due on receipt of the invoice"), the credit available to the company when it has a limit, and the purchase order field. A required purchase order number left empty stops the order: "Enter your Purchase order number to pay on account."

The order is placed On hold (or Processing) without payment, with the order note "Placed on account. Payment due by ...". The due date is the order date plus the terms, due by the end of that day in the store's time zone. The thank-you page adds the instructions; the order details there and on **My Account → Orders** show **Payment due, Purchase order, Paid so far** and **Still owed** (marked **Overdue** after the due date). Company owners, managers and finance members see these on the company's orders they may open. The customer's order emails show the same lines and the instructions; the store's emails show the lines.

In the business portal, the purchase terms list says "Pay on account: payment is due 30 days after the order. Company credit limit: \$5,000.00." while the payment method is switched on, and members who see company orders read what the company owes: "Your company owes \$1,200.00 on account for 3 orders. Overdue: \$400.00 (1 order)."

What a company owes and the credit limit

What a company owes is the sum over its unpaid orders on account of each order's total, less its refunds and the payments you recorded. An order cancelled, failed, refunded or deleted owes nothing. At checkout, what the company owes plus the new order's total must stay within its credit limit, or the order is refused: "This order is more than the credit available to your company on account (\$50.00). Pay another way, or contact the store." The check runs under B2B's business lock, so two buyers of one company placing orders at the same moment cannot pass the limit together. A company can have up to 1,000 unpaid orders on account; past that, record payments before it orders on account again.

Record a payment

Accounts receivable → What companies owe lists the companies with unpaid orders on account, the earliest due first, 25 per page: **Owed, Overdue, Credit limit** and **Unpaid orders**. Open a company to see its terms, what it owes, what is overdue, the credit limit and what is available, then each unpaid order: its number (a link to the

order), Due or Overdue with the date, the date placed, the status, the total, what was paid, what is owed and the purchase order. The order screen in WooCommerce shows the same **Pay on account** lines with **Record a payment in B2B → Accounts receivable**.

Under an order, **Record payment** takes the **Amount received** (all that is owed is filled in; a part is allowed, more than owed is not), the **Date received** (today or earlier) and an optional **Note** (for example the bank reference). **Review changes** shows what is owed now and after the payment; **Publish these changes** records it. The order gets a private note ("Payment of \$40.00 received on October 22, 2026 and recorded in B2B. Still owed on account: \$60.00.") and the company's activity lists it. Paid in full, an order On hold or Pending payment is completed through WooCommerce's own payment completion (it moves to Processing, or Completed when it needs no processing, and WooCommerce sends its usual email); an order already Processing keeps its status. A form opened before another payment was recorded on the same order is refused: reload and review it. **Recently paid or closed** lists the company's last 20 settled orders.

Marking an order Processing or Completed yourself in WooCommerce does not record a payment: the order still counts as owed until you record it here.

Payment reminders

Under **Payment reminders**, enter **Days before the due date** and **Days after the due date** (0 to 60; 0 sends none), review and publish. Once a day B2B sends, for each order that still owes something, one reminder within the days before its due date ("Payment due soon for order #...") and one once the days after it have passed ("Payment overdue for order #..."), to the order's billing email. Each names the order, the amount owed, the due date and the purchase order, adds the payment method's instructions and links to the order. An order never gets the same reminder twice; an order due sooner than the days before gets its reminder at the next daily check. The company's activity records whether your mail system accepted each one. The check runs on WordPress's scheduled tasks (where WP-Cron is switched off, the server's own cron runs them) and stops when both days are 0.

Cancellations, refunds and other payment methods

A cancelled, failed or refunded order no longer counts as owed; brought back (for example from Cancelled to On hold) it counts again. A refund lowers what the order owes. When an order on account is paid with another payment method instead (set back to Pending payment and paid by card), it no longer counts as owed. Automatic moves between groups count an order on account only once its payment is recorded in full. While B2B's license is not active, Pay on account is not offered and **Accounts receivable** shows the records without **Record payment**.

Separate business stock

A simple product or a variation can keep a business quantity beside WooCommerce's own stock. Approved business customers see and buy from the business quantity; retail customers and guests see and buy from WooCommerce's stock as before, and neither touches the other.

Set it on the product's **Inventory** tab: tick **Separate business stock**, enter the **Business quantity** and choose **Business backorders (Do not allow or Allow)**. For a variable product, each variation has the same three fields in its own inventory options; a variation without them sells to business customers from its WooCommerce stock. Other product types (grouped, external) have no business stock. The products list shows the business quantity under the stock column ("Business: 12"). Switching it off keeps the saved quantity for later.

What business customers see. The product's availability reads the business quantity in your store's stock display format ("12 in stock"), and the product is out of stock for them when the business quantity is 0 or less and business backorders are not allowed ("Available on backorder" when they are). The cart refuses more than the business quantity, counting what is already in the cart: "Only 5 of "Pallet" are available for business orders. Change the quantity in your cart." or "'Pallet" is out of stock for business orders."

When it changes. A business checkout (the block checkout, the classic checkout or the pay page of an existing order) takes the business quantity when the order is placed, before payment, under B2B's business lock, so two business customers cannot take the same units: the second is refused with the same message. WooCommerce does not hold or reduce its own stock for those lines. The order gets a note such as "Business stock taken: Pallet × 3 (12 → 9)." The quantity is given back, with a note, when the order is cancelled or fails (including WooCommerce cancelling an unpaid order after its **Hold stock (minutes)** time), when you refund the line with **Restock refunded items** (the refunded quantity), or when a line is removed (by you on the order screen, or by the block checkout rebuilding an unpaid order's lines after the cart changed). An order brought back from Cancelled or Failed takes its quantity again, below zero if need be. An unpaid order keeps its business quantity until it is cancelled; with **Hold stock (minutes)** empty WooCommerce never cancels unpaid orders by itself. With business backorders allowed, business orders can take the quantity below zero.

What does not change it. Changing a line's quantity on the order screen does not change the business quantity; correct it on the product. Orders you create on the order screen are not business checkout orders and take WooCommerce's stock. WooCommerce's low-stock and out-of-stock emails are about its own stock only.

Saving the product. **Update** saves the business quantity only when you changed it. If business orders changed it while the product was open, your number is not saved and the screen says: "The business quantity of Pallet was not changed: business orders changed it to 9 while you were editing. Review it and save again."

Business portal and current terms

The ordinary My Account dashboard summarizes your application/company and gives authorized links. Pending, rejected, suspended or withdrawn accounts receive status-specific instructions. **Business account** lets you review your account details; **Your orders** opens your permitted order history. Approved purchasers additionally have **Shop products**, **Quick order**, **Saved lists** and eligible quote actions. Finance sees company records and quotes without a new-order workspace.

The full **Business portal** brings together **Start an order**, saved/working lists, Business account, Company team, eligible Business quotes, recent completed/processing purchases, **Order again**, **View cart** and catalog exports. Its visible saved-list count includes accessible shared company lists as well as your private lists.

Expand **Your current purchasing terms** to read the active pricing basis or role pricing, retail-promotion handling, tax treatment, merchandise/quantity rules, quote requirements, named payment/shipping permissions and company/employee spending limits. Amount rules can use different bases; follow the basis named beside each rule. Your colleague's personal limit is not exposed. If a currency/decimal mismatch needs store review, wait for that correction before relying on an old limit display.

Lists do not reserve stock, lock prices or apply coupons. Cart/checkout calculate tax, delivery and permitted coupons and confirm final limits. When new business ordering is unavailable because licensing is unavailable, permitted retained lists/order/quote links remain readable, including retained-list export; new ordering and current-catalog pricing do not resume merely by opening old records. Contact the store when your portal shows an access or commerce-connection hold.

Find products and choose quantities

Open **Quick order** → **Find products**, or start an order from the portal. Search **Product name or SKU** using up to 100 bytes. When enabled, Category and Tag accept an exact category/tag name or slug; suggestions come from products you may currently see, so they are not a complete global category list. Choose Table or Cards layout and run the search. **Next products** continues the current results; **Start a new search** resets the cursor. Permission filtering can leave a page with few or no products even when a next page exists.

Read the product's minimum quantity, step and any maximum. Enter **Quantity to add** beside each required product and use **Add selected to order list**. Blank quantities are ignored. These are additions to any existing cart quantity. A per-row quantity must ultimately be a whole number from 1 to 10000; current product rules and stock may impose tighter limits. This stage builds a working list and does not add to the cart.

For a variable product choose **Choose variations**, select a concrete variation and fill any remaining choices. The store may show a variation grid when one or two attributes can be displayed safely. Only actual permitted variations on that page receive quantity boxes; an empty grid cell is not a promise about every combination in the store. If the product needs unsupported options, use **View product** and its original workflow.

Catalog prices indicate one unit. Reviewing the actual list recalculates quantity tiers and projected basket pricing. Availability may say **Available; backorders permitted** rather than promising immediate stock. A product that is hidden, no longer purchasable, out of stock, protected by another workflow or disallowed for your company may disappear from search.

Configure the buyer order form

Store staff use **B2B** → **Setup & defaults** → **Buyer order form**, then review and publish their settings. The initial layout is **Compact order table**; **Product cards** is the alternative. The following controls initially are on: **Show SKU**, **Show unit prices in catalog and catalog exports**, **Show availability**, **Allow category filtering**, **Allow tag filtering**, and **Use variation grids where suitable**. **Show product thumbnails** initially is off.

Names, variation choices, quantity rules and quantity inputs always remain. Hiding catalog prices also removes them from catalog CSV, but the required price review still shows the actual item prices before adding. Hiding catalog SKU does not remove SKU from the reusable-list CSV needed for list exchange. A variation grid falls back to ordinary product controls if it has incomplete/ambiguous choices, more than two attributes or more than six columns.

Build and edit a working order list

The Quick order sections are **Find products**, **Paste or upload**, **Your order list**, **Saved lists** and **Order again**. The working list belongs to your current signed-in session. Save a named list if you need it on another visit; an unsaved working list is not a reusable company record.

Store staff may place `[affstackdev_b2b_quick_order]`, `[affstackdev_b2b_portal]`, `[affstackdev_b2b_team]` or `[affstackdev_b2b_purchases]` on dedicated pages for the corresponding workspace. Use one main ordering surface per page and exclude personalized pages from shared page/CDN caching. If a new account link returns 404 after installation, visit administration, then save **Settings** → **Permalinks** once if needed.

In **Your order list**, change **Quantity to add**, complete variation choices, or select **Remove** beside unwanted rows. Choose **Review quantities and prices** to apply edits and validate the whole list. If a SKU is unresolved, use

Choose a replacement SKU, or remove this row. An unavailable saved product keeps its recorded identity; remove and choose a replacement rather than assuming a reused SKU is the same item.

Clear order list clears this draft and its saved-list association, leaving cart items and stored saved lists intact. Editing, loading, copying or saving a list retires an earlier price review. A working list holds at most 100 rows, including appended selections. If an operation would exceed that limit, remove rows, use a smaller selection or replace the working list explicitly.

If the page says the list changed in another tab, refresh before editing. If it says the complete list did not reach the server, refresh and use a smaller batch. A stale page cannot overwrite the newer server list. If the session expires, sign in and refresh. A retired/frozen business setup or incompatible commerce connection must be resolved by the store before new list changes proceed.

Browser behavior and saving edits

When the store enables the enhanced interface, selected catalog quantities and unsaved editor changes are tracked. Before another operation or leaving through a workspace link, add selected quantities to the list, or review/save your edited list. In-page section links remain available. During a request, controls pause until the server responds and focus moves to its status message.

Without JavaScript, the same forms still work and reload the page. Save/review edits before navigating because the optional browser reminder may be absent. Export and print open through ordinary browser requests in either mode.

If a response cannot be confirmed, refresh the page and check the cart before submitting again. The interface does not automatically replay an uncertain cart add. Even if buttons become available again, first determine what reached the cart.

Paste or upload SKUs

Under **Paste or upload a SKU list**, either paste rows from a spreadsheet or choose a UTF-8 .csv file. Use one source per import. The limit is 100 data rows and 64 KB. Commas, tabs and semicolons are accepted. Simple rows need exactly two columns, SKU and quantity; an optional first row can be SKU, quantity or SKU, qty.

```
SKU, quantity
YOUR-SKU-HERE, 6
YOUR-VARIATION-SKU, 12
```

Choose **Add rows to order list**. Imported rows append to the working list; they are not purchased. Use variation SKUs for concrete variations and complete any remaining choices in the editor. Unknown, duplicate or unauthorized SKUs cannot be silently resolved. Correct every marked row before review. Quantities need whole digits without signs, decimal points, leading zeros or grouping separators. A combined duplicate product/choice still cannot request more than 10000 units.

Keep a SKU containing leading zeros as text in your spreadsheet; the whole-number restriction applies to quantities, not SKU text. Quote a SKU containing the chosen CSV delimiter. Clear the working list first if an import should intentionally replace its contents, because import always appends.

You may also re-import a B2B reusable-list CSV with its five-column header unchanged. That format preserves product IDs, SKUs, quantities and supported variation choices. The catalog price-reference CSV is a different format and is not the list re-import format. Do not remove or reorder the reusable header/columns. Invalid JSON choices, missing rows, changed schema markers or a file exceeding 64 KB require correction before import.

The upload is read for this import only and is not added to the Media Library or published. Spreadsheet content is treated as data. Keep a saved copy of any reusable CSV you intend to use later.

Review prices and add to the cart

Choose **Review quantities and prices** after completing the list. The review combines duplicate product/choice rows, checks quantities already in your cart, applies current quantity tiers, and checks stock including variations sharing stock. A sold-individually product allows one total unit including the cart. If a current cart item needs its own managed workflow, review that item in the cart before adding the same product through Quick order.

Correct every marked error before proceeding. **Ready for your review** shows product/options, combined quantity, unit price, line amount and any pricing explanation. **Items being added** totals these additions; final tax, delivery, permitted coupons and order limits remain subject to cart/checkout. Follow the stated tax-inclusive or tax-exclusive display.

A review lasts 15 minutes. Choose **Edit list** if you need changes. Cart contents, prices, stock, tax/address details or account terms changing can require another review even within that time. Once satisfied, choose **Add reviewed items to cart**. This increases existing cart quantities and does not replace them.

Read **Cart update** afterward. **Added** confirms the quantity added for that line; **Not added — review the cart message** means that line needs attention. Confirmed not-added rows remain available for another review. Use **View cart and continue** to inspect the result and proceed.

A request can stop after adding some items. Earlier additions are not automatically rolled back. If the result is uncertain, the working list is cleared to avoid replaying quantities and the page directs you to the cart. Inspect it, then build a fresh list only for what is actually missing. Repeating the same reviewed request does not add it a second time, but creating a new review can add more; always check first. Receipt cleanup does not remove purchased or cart items.

Save private or shared purchasing lists

After building a list, expand **Save this list for next time**, enter **List name** and choose **Save list**. A name is required and allows 120 bytes. Resolve unknown SKUs first; an already-known product which later became unavailable can stay saved for future attention. Save stores quantities and choices, not prices, stock or payment details.

Saved lists remain available after signing out and on another device when you use the same login and business account with current access. Submit editor changes before exporting; exports use the last server-saved working rows, not unsent changes in the browser.

Leave **Share this list with my company's buyers and managers** unchecked for a private list. Check it to let the company's purchasers use it. You may own up to 25 lists in the company, including shared ones; the company may have up to 25 shared lists. Update or delete an existing list when at capacity. A very large set of choices may need shorter choices or fewer rows to fit the saved-record size.

Under **Saved lists**, each record says **Private list** or **Shared with company**. Use **Copy to working list**, then adjust quantities and review today's prices. If another list is already open, explicitly choose whether to add to it or replace it. Replacing from your editable saved list keeps the connection for **Save changes**; appending creates a combined draft and does not automatically overwrite either source.

The creator can edit their own list. Company owners/managers can edit shared lists; another buyer can use a shared list or save a personal copy, not overwrite it. Owners/managers do not receive access to someone else's

private list. When an editable saved list is open, use **Save changes to your saved list → Save changes** or **Save as a new list**. Changing sharing is part of that explicit save. Saving does not add anything to the cart.

Rename or delete → Rename changes only the saved name. To delete, select **Delete this saved list** and use **Delete**. Deletion removes the reusable record but leaves the current working draft and cart unchanged; there is no restore button. Reload when a saved list changed in another tab or a manager changed it, then review its latest version before saving/renaming/deleting. An old draft is not automatically made current by renaming the stored record.

Copy your cart, a list or a previous purchase

Copy items between your lists keeps supported product choices and quantities, with the source left intact. When a working list exists, choose **Add to my current working list** or **Replace my current working list**. Copies do not carry payments, coupons, shipping choices, old discounts or guaranteed prices.

Copy cart items to working list copies a cart of 1–100 ordinary supported rows. The cart stays unchanged; adding the copied list back later adds those quantities again. If the cart changed since the page opened, reload before copying. Cart items with unsupported add-ons or managed options are refused without copying any of the cart. Use their original product or quote workflow.

Under **Order again**, choose **Show my previous orders**. The list contains only this login's processing/completed purchases you may still access, ten per page. Use **Newer orders/Older orders** and **Copy items for review**. Company-wide history permission does not allow reordering another employee's purchase. The source order needs 1–100 product rows; for a larger order, build a smaller list through search.

Reordering copies original product quantities and recorded native choices, not a refund-adjusted quantity or today's default variation. A deleted item, incompatible add-on or missing old choice becomes a marked row rather than disappearing silently. Remove/replace it through the appropriate product workflow and review all current prices, stock and rules. Historical coupons, payments and shipping stay with the original order.

When quote requests are available, **Open quote basket to copy this working list** opens the quote workspace. There choose **Copy working quick-order list**, review the copied items, and explicitly send the request. The link itself does not send a quote. Changed working lists, unsupported product options and any-value variations which cannot be represented in the quote form must be corrected or requested through the product page/store. Copying a list does not reserve a quote price.

Export, print and reuse lists

Use **Export or print this catalog selection**, **Export or print working list** or **Export or print saved list** from the current workspace. The export belongs to your account and current list revision. If the account, permissions or list changed, reopen it from the refreshed page.

The preview shows company, generation time in UTC, currency/tax display, products and choices, quantities, any permitted unit price and ordering notes. Use your browser's Print command to print it or save a PDF. The print layout removes controls and keeps the table headings. **Back to business portal** returns you to the workspace.

Catalog export is a current reference of the permitted filtered catalog. Choose **Download this catalog batch (CSV)**. Each batch considers up to 500 candidates and may show fewer because availability and permissions are applied; use **Continue to the next catalog batch** when offered, even if the current batch is empty. Catalog price

is a one-unit indication, with minimum/step/maximum and availability notes. Select any remaining variation choices when ordering. The price-reference catalog CSV cannot be re-imported as a purchasing list.

For saved/working lists, choose **Download reusable list (CSV)**. It includes product IDs, SKUs, quantities and supported choices, with no saved prices. Re-import it through Quick order with its header intact, then review current terms. The complete reusable CSV must fit 64 KB; a list that fits saved storage may still need splitting into smaller lists for export. Unknown SKUs must be resolved before exporting the working list.

Unavailable current products export their ID and quantity with a review-required marker, so a later import cannot silently choose a changed variation. The preview reports unavailable items and present review errors. Exported CSV protects formula-looking text; keep its generated structure intact for reliable re-import.

If current business ordering is unavailable because licensing is unavailable, approved purchasers may still export retained saved/working quantities and choices. Those exports show record IDs and retained details without fresh prices or availability. Review again after ordering resumes. No export is a stock reservation, accepted quote or promise that the same terms will apply later.

Customize buyer presentation

The store's theme developer can customize the portal status summary, authorized action cards and current purchasing terms, as well as the quote presentation components, through the documented theme override files. Customization changes how prepared information is shown; company permissions and server checks remain in force. Ask the developer to preserve accessibility, output escaping, forms and confirmation controls. Exact file names and prepared values are in the buyer template contract.

Agency license purchasing

Agency pricing gives an approved business group reviewed terms for specific license configurations. A configuration contains a stated number of included licenses per package. Extra activations and add-ons do not increase the quantity used for a discount.

Included licenses in an eligible selection	Discount from its reviewed price basis
26-100	10%
101-300	25%
301-500	35%
501-1,000	50%

For example, three packages containing ten licenses each count as 30 included licenses. At a reviewed package price of 199.99, the 10% discount gives 179.99 per package, or 539.97 for three packages before applicable tax and other permitted checkout adjustments. The package amount is rounded once to the currency's precision. Retail promotions do not combine with business purchases.

Business customers can always buy licensed software like any retail customer. A pending applicant, or an approved business whose group has no agency terms for the chosen license configuration, pays the ordinary store price at checkout; the agency discount applies only to configurations mapped in the group's agency terms. Company purchasing permissions and account suspension still apply.

Configure a group's agency terms

Open **Agency licensing** in the B2B workspace. Choose a **Business group**, then **Open agency terms**. Create an ordinary group under **Business groups** first if necessary. No program, sample price or historical price is enabled automatically.

Control	How to use it
Enable this group's agency license terms	Enable only after adding at least one valid licensed-product mapping. Turning it off stops that group publishing agency discounts.
How quantities reach a tier	Count each exact selection separately, or pool comparable selections of the same product. Pooling requires matching license terms, currency, tax basis and product identity; unrelated products never combine.
Below 26 included licenses	Ask for a quote, or permit a mapped agency configuration at its current agency price without a volume discount. A history-based configuration still needs at least 26 licenses.
Product mapping change	Keep mappings, add/replace the selected variation, or remove it. Other group discounts and settings remain.
Find a licensed product	Enter a specific name and choose Search products without saving . Up to 50 catalog matches are shown.
Licensed variation	Choose the exact supported plan. Load selected variation and its sources refreshes its historical-source choices without saving.
Selected product price basis	Choose the current selected agency price or the lowest verified eligible sale price in the last twelve months.
Agency-price confirmation	Confirm explicitly that the exact selection's current catalog price is its agency price. The review shows price, currency, tax basis and included licenses.
Verified history source	For a history basis, choose saved evidence for the exact variation. Refresh or replace unavailable, changed or stale evidence.

Review the proposed values and affected group, product and account, then choose **Apply reviewed changes**. The review expires after 20 minutes. A changed group, settings record, account, catalog or site requires another review. **Back to editor** returns to the retained draft without applying it. A failed save displays its reason and retains the editable draft. Review and save one product mapping at a time; a group supports up to 100 mappings.

Agency pricing needs the supported licensing connection, an approved buyer with an assigned group, and permission to purchase. The connection status distinguishes unavailable agency licensing, connected pricing without supported quote checkout, and connected pricing with licensed quote checkout. Every purchase still validates current terms and payment evidence. Technical contracts are in the agency integration reference.

Import verified historical prices

In **Verify historical sale prices**, choose the exact **Licensed variation**, enter a traceable **Source record or report reference**, paste **Price history CSV**, and select **I verified these intervals against the source records and their eligible price terms**. Use an internal report reference without customer information. This confirmation records your review; it does not retrieve missing source records.

Use these exact column names: `start`, `end`, `unit_price`, `source_reference`. Enter UTC timestamps such as `2026-09-29T12:00:00Z`, ordinary decimal prices in the configuration's currency and a traceable reference for every interval. Intervals must meet exactly, with no gaps or overlaps; each end is later than its start and cannot be in the future. Supply up to 500 rows and 128 KiB, covering at least twelve calendar months and ending within the last 24 hours. Do not use embedded newlines in a CSV field. Prices must fit the currency's decimal precision. References use letters, numbers, underscore, dot, colon, slash or hyphen and are at most 128 characters, starting with a letter or number.

The review shows the product, source, coverage dates, interval count, lowest eligible package price and tax basis. Save the reviewed evidence, return to the group's terms and choose that source. Saved evidence is retained unchanged. A changed licensed configuration or coverage ending more than 24 hours ago requires a new import and a reviewed source mapping. Historical pricing remains available only while this evidence is current. See the exact history format.

Check a price and request a licensed quote

Eligible signed-in buyers see **Agency license pricing** on relevant product pages. Select a plan and package quantity to see included-license count, percentage and per-package displayed price. The panel updates after changes. **Request a license quote** opens the business quote form with the product selection. If automatic preview is unavailable, use that link to select the plan and review pricing through the form.

The preview covers the current selection. Checkout confirms permitted combined quantities, tax and credit against current account and group terms. Extra activations and add-ons do not help reach a tier. Eligible combined quantities cannot exceed 1,000 included licenses through this pricing path. For larger requirements, contact the store. The licensed quote path also has this 1,000-license limit. Changing a selection can make its previous price unavailable.

A licensed quote contains one initial license configuration, optionally with supported standard initial-license add-ons. Renewals, existing-license changes and mixed product purchases use separate orders. Choose **License configuration**, **Number of packages** (1–1,000) and **Standard add-ons per package** (0–250, default zero). The form starts at 26 packages, but discount bands count licenses inside those packages. The chosen plan's own limits still apply. A store manager must link the conversation to an approved business buyer and review current pricing before publishing an offer.

The offer contains the package rows, permitted add-ons at their standard price, currency, tax basis, offer deadline, calculated delivery, terms and reference. Its deadline cannot outlast the current price authority: at most seven days for an agency quote, and no later than 24 hours after recorded historical coverage ends for a history-based quote. A changed account, group, product, price basis or expired deadline requires a reviewed replacement.

Connected purchasing limits

The licensing service can impose lower purchasing limits than the form maximum. Its connected capacity also limits total add-ons to at most 500, with at most 250 per package, and can limit package count to 500 on a connection without the newer capacity report. An unavailable or inconsistent capacity report holds the purchase. The store must keep the protected licensing and financial transaction services connected; a successful quote conversation alone does not reserve or authorize an unsupported purchase. See companion capacity. Developers can also consult the literal field and transport index.

Accept and recover the same licensed order

Only the original purchaser can accept the licensed offer. Empty the cart before loading a newly accepted licensed offer, then check out the exact offer by itself. Added products, changed quantities/options or missing rows require review. Reopening an already added offer reuses it; it does not deliberately remove and re-add your purchase.

The quote is tied to its accepted revision, customer, site and original order. If checkout needs recovery, reopen that same quote and order. The store verifies the licensing and financial records before continuing payment. If the original records or licensing checkout service cannot be verified, contact the store before payment; the quote cannot create a replacement order. This protects the accepted price and any permitted credit attached to the original transaction. Developers can use the protected quote and recovery reference.

AffStackDev storefront owner shortcut

On the verified AffStackDev root storefront only, **Review the owner's business account** offers an explicit setup for the first WordPress user. It shows the owner's login, email, existing roles and storefront. Type the displayed email, confirm **Business account name**, and choose an existing **Agency group** or create the prefilled group using **New group name** and **New group description**. Business account and group names allow up to 200 bytes; the description allows up to 800 bytes.

Reviewing and applying approves that owner's business account and assigns the group. Existing WordPress roles and permissions are preserved. A newly created agency group remains disabled until its product mappings and terms are reviewed. The account must either be new or already belong to that user with active owner membership.

After setup, reversal is offered only while the account, group and identity remain unchanged. Review and apply the reversal to restore the previous account fields. A newly created account is withdrawn and detached from its group, while membership and history remain. Created groups, price history, quotes and orders are retained. Later changes prevent this shortcut from undoing subsequent work; make any needed changes through normal account and group administration.

Tax exemptions

A tax exemption applies only after approval, during its reviewed dates and for its reviewed destination. Applying does not remove tax. Approval belongs to the individual customer and current business-account relationship, or to the authorized guest session. Another member of the same company does not inherit it. Tax approval does not approve a business account or change WordPress roles.

Set up eligibility and approval

Open **Tax exemptions** → **Tax setup** → **Eligibility and approval**. New installations start with applications, guest access, required documents, VAT validation and automatic approval off. Manual review is the default.

Control	Effect and requirements
Enable tax exemption applications	Makes applications available to eligible people after at least one destination country is selected.
Allow guest applications on the tax exemption page	Requires a published public page containing [affstackdev_b2b_tax_exemption] selected as the tax exemption page.

Control	Effect and requirements
Require at least one private supporting document	Applicants must attach a valid document at final submission.
Offer VAT validation with the applicant's explicit consent	Offers an official VAT check for that application. No consent means no check.
Approve eligible validated VAT requests automatically	Requires VAT validation and explicit destination countries; the additional conditions below still apply.
Eligible customers	Include all approved business customers (the starting selection), selected individual customers, approved customers in selected business groups, or safe customer roles. These choices permit applying; they do not approve anyone.
Search customers and business groups	Update audience choices refreshes choices without publishing; previously selected entries remain visible. Privileged roles are excluded.
Tax exemption page	Use My Account, or choose a published password-free public page containing the shortcode. A page restricted by business content access cannot be selected.
Default approval validity in days	Starts at 365; choose 1–1,825. Every approval still has an end date.
Permitted destination countries	Choose at least one before enabling applications. Each certificate has its own narrower reviewed scope.

Review the displayed settings, then apply them. The four setup sections save independently and preserve the others. Changes are rechecked against the latest settings revision. If someone changed the policy or the form arrived incomplete, reopen it and review again. An incomplete large form may require the host to raise its request-input limit. Existing decisions and evidence remain in history while current carts recheck policy.

Suspended, rejected or withdrawn business contexts do not qualify through audience selection. Signed-in customers must still belong to this site. When licensed tax changes are unavailable, the workspace keeps existing records readable and directs new work to license recovery.

Configure application questions

Under **Application questions**, add up to 50 questions. For each, set **Question key**, **Label**, **Position**, **Example or placeholder**, **Field type**, **Help text**, **Choices**, **one per line**, **Default answer**; **multiple choices use one per line**, **Show this question** and **Require an answer**. Choose **Remove definition after review** only when removing the current definition. Disabled questions stay available to enable later; earlier answers keep their original labels and definitions.

A key is a unique lowercase name, beginning with a letter and using letters, digits or underscores, at most 40 characters. Labels allow 160 bytes, placeholders 200 and help text 1,000. Position is 0–10,000; equal positions sort by key. Choice questions support up to 30 distinct choices of at most 160 bytes each. The complete configured form is limited to 64 KiB.

Available types are **Text**, **Long text**, **Email**, **Telephone**, **Website**, **Number**, **Date**, **Dropdown**, **Single choice**, **Checkbox**, **Multiple choices**, **Consent checkbox**, **Heading**, **Explanation**. Ordinary text answers allow up to 1,000 bytes and long text 4,000. Email and website answers must be valid; websites use HTTP or HTTPS. Numbers use ordinary decimal notation, optional minus and at most six decimal places; dates use a valid year-month-day.

Dropdown/radio answers must be listed choices; multiple choices allow at most 30 selections. A required checkbox must be selected. A consent checkbox is never preselected. Headings and explanations display text without collecting an answer.

Defaults help fill the initial form; they do not silently answer missing fields at submission. If questions change while an applicant is completing the form, they must refresh and review the current questions. **After submission** is required confirmation text, up to 1,000 bytes; its default says the request was received and status will appear after review. Use concise text when approaching the overall form limit. Technical field formats are in the question reference.

Apply, review and send evidence

Signed-in customers use **My Account → Tax exemptions**. The entry remains available when their existing requests need to be read, even if new applications are closed. A configured public page provides the same form and guest entry.

1. Open **Apply for a tax exemption**. Enter **Business or legal name** as shown on the evidence, and a guest **Email address** when requested. Signed-in applications use the current login email.
2. Choose **Country where the exemption applies**. Use **Update destination choices** when necessary, then choose **Certificate scope** and **State or province**. Country-wide scope must be deliberate; a state certificate does not cover a whole country. A state-scoped request needs a subdivision supported by the store's country catalogue.
3. If VAT checking is offered, enter **VAT registration country** and **VAT registration number** and select the consent box for this application. These are optional unless your intended evidence requires them. Explain **What is this exemption for?**, answer the store's questions, and choose whether to receive email decisions/reminders (selected initially).
4. Choose **Review application**. Check the contact, scope, reason, VAT consent, email preference and answers. **Back to details** returns without submitting.
5. On the review screen, choose up to three **Private supporting documents**, complete any displayed submission protection and choose **Submit application**. Use PDF, JPEG or PNG, at most 2 MiB each, with a short filename (up to 160 bytes). At least one is needed if the store requires it.

The legal name limit is 200 bytes; guest email 254; the public reason field accepts 2,000 bytes. Supporting files must have contents matching their type. Files are kept privately in the application's records and downloaded through authorized links, never public media URLs. If an upload fails, export a fresh supported file or check the host's upload limit, then select files again. A failed submission leaves details as a draft; it has not submitted that draft.

A repeated final submission from the same form returns its already saved request rather than creating another. Limits are ten new requests per signed-in customer per hour, or 50 across guests. VAT checks are additionally limited to eight per signed-in customer or 30 across guests per ten-minute window; wait before trying again when a limit is reached.

Understand VAT results

With the store's VAT option enabled and your explicit consent, the application sends the VAT country and number to the official VIES validation service. It does this during submission, never as part of checkout. Supported registration countries are Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands,

Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and Northern Ireland (XI). Greece accepts GR/EL. The national number may include its matching country prefix; interior spaces are removed. Use XI for Northern Ireland.

Results are **Valid**, **Invalid**, **Unavailable** or **Not checked**. A service problem gives Unavailable, not Invalid. The private request retains your submitted VAT registration and minimal verification evidence. The service's returned business name/address and raw transport errors are not added to the verification record. A valid registration by itself does not grant tax exemption.

Automatic approval additionally requires a signed-in approved business customer, an explicitly permitted country-wide destination matching the VAT registration country, and a destination different from the store's base country. The verified result must be fresh and match the submitted number. Guests, state-only certificates, domestic requests and unavailable/invalid/unchecked results continue to manual review. The merchant's configured approval period sets an automatic approval's end. See VAT requirements for integration details.

Review requests and grant an exemption

Store managers use **Tax exemptions → Requests and approvals**. Filter by **Status**, search **Customer name or email**, choose a customer if needed and select **Filter requests**. The list shows 25 records per page; use **Previous** and **Next**. **Open request** displays applicant, destination scope, status, UTC validity, submitted reason, customer-visible decision, VAT result/time, original question answers, supporting documents and **Application history**. Staff also see customer identity, revision and approval source.

For an awaiting-review request, choose **Approve for the reviewed destination** or **Do not approve**. For an approved request, choose **Revoke approval** to end it. Enter a required **Reason shown to the customer**, up to 4,000 bytes. Country-wide approval needs the explicit confirmation that the evidence covers the entire country. Review **Valid from (UTC)** and **Valid through (UTC)**. The start is the beginning of the selected date; the through-date includes that complete UTC day. The end must be future, start before end, and the window no longer than 1,826 days. Review and apply the decision. If the request, eligibility, membership, destination policy or settings changed, open the current record and review again.

Use **Grant an exemption** when you have already reviewed evidence for an existing customer. Search and update customer choices, choose **Customer receiving this exemption**, then enter the legal name, destination/scope, dates and required reason. Confirm country-wide scope if applicable. This creates its own approval history; it does not create or approve a business account. This form does not upload certificates or run VAT checks. Only currently eligible customers can receive a grant.

The states mean:

Status	Effect
Awaiting review	No exemption from this request.
Approved	Applies only within its dates, for its destination and while current eligibility remains valid.
Not approved	The reviewed request was declined; read the reason and submit improved evidence if appropriate.
Revoked	Approval ended or was replaced.
Expired	The end passed; checkout stops applying it immediately, even before a background history update.

Approved, expired, declined and revoked records offer **Request renewal or submit new evidence** to the applicant. Renewal preselects legal name and jurisdiction but creates a new request with new evidence; the earlier request remains unchanged. A new approval supersedes the old approval for the same destination scope or the explicitly renewed request. An active approval cannot be replaced now by a future-start approval: start the replacement now or review it when the new start arrives. Approvals for different jurisdictions can coexist. More than 50 unresolved approved records for one subject requires staff review before another approval can be added.

Guest access and private evidence

Guest requests stay with their browser session. Sign in before applying if you need ongoing account access. Sharing an email address with an application does not open its records, and a new business/team relationship does not inherit someone else's approval.

A guest notification can include a private recovery link valid for 30 days. Open it while signed out, with cookies enabled, then confirm **Open this request**. The confirmation lasts ten minutes and works only in that browser. It opens only its own request. Opening a new confirmation page replaces the previous confirmation. If the link expires or no longer works, contact the store. A recovered renewal updates that browser's access to the newly submitted request.

Supporting-document links recheck request access and file integrity on every download. A missing or damaged document cannot be downloaded; ask the store to review its retained records or backup. Tax files and decision history are retained with their applications. The business-registration document removal control does not remove tax certificates.

Price display, checkout and previous orders

Under **Tax setup → Price display**, choose **Catalog price display** and **Cart price display: Use the store display setting, Include tax**, or **Exclude tax**. Configure its own eligible-customer audience using the same customer/group/safe-role controls. Both start by inheriting the store setting. Price display changes presentation only; it does not approve an exemption or remove checkout tax.

Checkout evaluates the current native tax destination, including local-pickup behavior, and the current customer's approval, dates, group/account relationship and policy. A state approval applies only to that exact state. Changing address or losing eligibility can restore tax. An exemption is temporary during the current calculation; B2B does not save a permanent customer-wide exemption flag. Other components' independently owned tax settings remain under those components' control.

If the approval, address or totals changed, refresh checkout and review the new totals before ordering. If an active approval was not reflected in the calculated tax, contact the store before placing the order. Customer-specific tax display and exemption results use private cache handling; keep the store's cache setup compatible with its private customer pages.

An order retains the tax decision made when it was placed. Staff, the signed-in original buyer and the order email see a simple historical exemption statement, without exposing certificates, VAT numbers or review notes. Later approval changes do not rewrite that receipt. If a pending order already has its reviewed tax record, open its existing payment link from **Orders**; restarting checkout cannot replace its recorded tax review. The checkout integration reference explains the supported classic and Blocks routes.

Customize messages and inspect delivery

Tax setup → Messages lets the store enable notifications, set **Staff email addresses**, **Brand name**, **Email footer** and **Days before expiry for renewal reminder**. Notifications start enabled; the brand starts as the site name, the staff address as the administrator email, and reminders at 14 days. Choose 1–30 reminder days. Enter one to five comma-separated plain staff addresses, without display names; the list is limited to 1,300 bytes. Brand permits 200 bytes and footer 1,000.

Each event—application received, approved, declined, exemption withdrawn, renewal reminder and expired—has **Staff**, **Buyer**, **Subject** and **Message** controls. Buyer messages start enabled for all events; staff starts enabled only for a received application. Subjects are required single-line text up to 200 bytes; messages are required plain text up to 4,000. Supported placeholders are {brand}, {application_id}, {event}, {application_url}. They insert safe status information and a private link, not tax numbers, files, answers or review reasons.

Expand **Customer application and checkout messages** to edit **Application introduction**, **Awaiting review**, **Approved request**, **Declined request**, **Withdrawn approval**, **Expired approval** and **Checkout refresh notice**. Each is required plain text up to 1,000 bytes. Wording supplements fixed statuses, dates and checkout checks; changing wording does not change eligibility.

Save settings before using **Preview and test tax email**. Choose an **Event**, then **Preview saved message** or **Send example to my login email**. The preview uses invented example data; the example email goes only to your current login email and is limited to once per minute. It does not disclose a customer's request or create a private access link. If the mailer rejects the example, review store email configuration.

Recent tax email results shows the latest 20 results. **Queued** waits for processing; **Claimed by mailer worker** is currently owned by a sender; **Accepted by mailer** confirms handoff, not arrival in an inbox. **Suppressed by current access or preferences** means the request, recipient or settings no longer permit that message. **Attempts exhausted** needs review of store email setup. **Uncertain result** needs review before any manual resend because the message may already have been sent; it is never resent automatically.

Normal sends are queued after the application change is saved. Processing wakes shortly afterward and also runs hourly through WordPress scheduling. A definite rejection can retry after one, five and 25 minutes, up to four attempts. Changed addresses, membership, preferences, approvals or event settings are rechecked before sending; an outdated decision is not deliberately mailed as current. Renewal/expiry monitoring begins at its first run and avoids mailing old historical expirations. Checkout expiry does not wait for email processing. Terminal delivery metadata is removed after 60 days in small maintenance batches; applications, certificates, decision history and queued work are retained.

Activate and recover the B2B license

B2B needs its own license key from your AffStackDev account. Suite is optional. A site administrator activates and recovers it in the **License** tab of B2B's own screens (**WooCommerce → B2B**, or the B2B product in AffStackDev Suite). While the license does not permit business operations, B2B opens as **B2B records** with the license form at the top. The earlier **Settings → B2B license** address opens the same form. Business accounts, purchasing records, settings and order evidence remain saved during recovery.

Activate and read your status

1. Open B2B's **License** tab and, if needed, **Open AffStackDev account** to obtain the complete B2B key.

2. Enter **B2B license key** and choose **Licensed environment**: Production, Staging, Development or Local. The initial selection follows the WordPress environment. A production site needs an HTTPS address when required by the service.
3. Choose **Activate license**. The key is used for activation; B2B then stores its own encrypted installation credential for checks and updates.
4. Review the current status, site/environment, installation suffix, plan, last accepted and attempted checks, next due check and displayed deadlines. **Back to B2B** appears when operations are permitted.

The environment selection is locked while a credential is retained. Release or resolve that activation before changing it. If the server cannot securely encrypt credentials, ask the host to restore Sodium or OpenSSL support. Keys are limited to 128 bytes; enter the complete B2B key, not a key belonging to another product.

Check now / recover activation performs an explicit check. Use it before entering another key when **Activation recovery pending** appears: the earlier activation may already have committed even if its response did not arrive. B2B checks that candidate first and can recover it without creating another activation. If a replacement key is rejected, an independently retained active credential can be checked again. A busy-operation message means another license action is in progress; wait briefly and retry.

Understand checks, deadlines and restrictions

Idle sites and full-page cache hits need a real PHP request or scheduler run to receive a new server result. Normal checks run about every twelve hours, with up to fifteen minutes of timing variation. Safe administrator visits and ordinary browsing can retry overdue checks if WordPress scheduling is delayed. Recovery does not run during checkout, cart/account actions or other purchase/API mutations. Automatic activity checks use a four-second timeout; manual checks can take up to fifteen seconds. Multiple AffStackDev products share one automatic check per ordinary visit.

A previously accepted license lasts at most 72 hours without another accepted check, and stops earlier at its server-authorized term or grace deadline. Failed requests, automatic retries and page visits do not extend this deadline. An authoritative server restriction takes effect immediately. Network retries are approximately fifteen minutes, one hour and then up to six hours apart. **Check now** remains the manual recovery action.

Displayed state	What to do
Activation required / Site deactivated	Enter a valid B2B key to activate this site.
Licensed	Current accepted permission is available.
Licensed — validation overdue	The hard deadline has not passed, but a check is late. Use Check now if automatic recovery has not completed.
Licensed — connection grace	The service could not be reached. Existing permission lasts only to the displayed hard deadline.
Licensed — term grace	The service explicitly permits the license during its stated grace period; review the entitlement before the deadline.
Licensed — term and connection grace	Both conditions apply; the earlier deadline wins.
Licensed — deactivation pending	The remote release has not been confirmed. Retry pending deactivation; do not assume the slot is released.
Activation recovery pending	Recover the previous attempt with Check now before entering another key.

Displayed state	What to do
Validation required / Local license state needs recovery	A credential remains but its accepted local state needs validation. Use Check now.
Activation missing	The service did not find this exact active installation. Review its activation and recover.
License could not be authenticated	Review the B2B key/credential and product scope in your account.
License unavailable / License needs attention	The service has denied the current entitlement. Its public result may not distinguish expiry, suspension, revocation or another restriction; review your account or contact support.
License restricted by server	Business operations and protected updates are held. Resolve the restriction with the service; recovery remains available.
License validation expired	The term or 72-hour bound has passed. Use Check now to recover.
System clock needs attention	Correct the server clock and validate again.
Site identity changed / License credential needs recovery	Follow explicit reconnection below.

While the B2B license needs attention, ordinary customers still check out normally; business orders and new business operations wait until the license is accepted again.

An accepted grace period comes from the service; the plugin does not invent a new subscription term. The current permission deadline, server-authorized deadline and last-success information on the page identify the applicable limit. Exact diagnostic states are in the license reference.

Release an activation or reconnect a moved site

To free this site's remote slot, open **Release this site's license activation**, select **Release this site's remote activation**, then choose **Deactivate license**. Updating or deactivating the WordPress plugin does not perform this release. If the service response is uncertain, B2B retains the same release request and offers **Retry pending deactivation**. Only a confirmed response completes release. Resolve a pending activation before releasing it.

A changed site address, cloned installation or WordPress environment can break the stored identity match. Changing the WordPress environment type (WP_ENVIRONMENT_TYPE), for example when a staging copy becomes the live site, counts as a changed environment: release this site's activation first while the identity still matches, then reconnect after the change and activate again, so the released place is free. A changed encryption salt or unavailable encryption method can also make the credential unreadable. Under **Reconnect after a move or credential change**, select **Clear this copy's local license credential and reconnect** and choose **Prepare reconnection**. Then re-enter the B2B key.

For a moved/cloned site, this confirmation creates a new local installation identity. Same-site credential recovery keeps its identity. Reconnection clears this copy's local authorization but does not release the original site's remote activation. Manage that activation in your AffStackDev account. If you have no free slot, review existing activations there before retrying. Ordinary functioning installations use Check now or Deactivate license; reconnection is reserved for a changed identity or unreadable credential.

B2B protects its local credential and accepted state using site identity and WordPress salts. Keep the matching site/database configuration when restoring a backup. It will hold operations if the binding or authenticated state

no longer matches, while retaining business data. It never automatically treats a copied credential as permission for a different site.

Signed plugin updates

The **Signed plugin updates** section distinguishes:

Readiness	Meaning
Activate your license	Activate or recover B2B first.
Waiting for update service	Your license is accepted, but protected installation-token updates are not enabled for it yet. Use Check now after the service is ready.
Update verification needs attention	The trusted release key or PHP Sodium/ZipArchive support is missing. Ask the host or product support to restore the required component.
Signed updates ready	WordPress can check supported signed B2B releases.

A user with both site-administration and plugin-update permission can choose **Check for plugin updates**. The last check shows UTC time and **Up to date**, **Update available** or **Update check needs attention**. Normal checks cache a result or failed attempt for fifteen minutes; the explicit check refreshes it. Manage automatic updates through **WordPress → Plugins**. Automatic and manual updates use the same authorization and verification; B2B does not enable automatic installation for you. The native protected updater offers stable releases only.

Before replacing files, B2B checks current license permission, service authorization, the signed release identity, newer version and required PHP/WordPress/WooCommerce versions. It verifies the downloaded ZIP, every signed file and the extracted plugin's version and complete contents. The short-lived download authorization is specific to the protected package; a visible package selector alone does not grant access.

If an update needs attention, first open B2B's **License** tab and correct its reported prerequisite or entitlement issue. Refresh the offered update if it changed. Check host connectivity, required extensions, temporary-file storage and platform versions as applicable. Repeated service throttling calls for waiting before retrying. A failed signature, altered package or unexpected extracted file prevents replacement; obtain a valid product release rather than editing proof files to bypass verification.

For an already signed installation, changed, missing or extra files inside the plugin directory hold a protected update. Keep custom work outside that directory or restore the original signed files before retrying. An older installation without either proof file can receive its first signed update. Updating preserves the business data and does not release the license activation. The signed-update reference provides exact deployment and verification contracts.

Use your own AI with B2B

B2B works with the AI you already use. Claude, ChatGPT, Codex and other AI apps can read your B2B setup and records, answer questions about them and prepare changes. A chat in B2B's own screens does the same with your own AI company, and an optional shopping assistant answers signed-in business customers about their own prices. A change an AI prepares is saved only after you approve it in WordPress, with the exact values in front of you, and most saved changes can be undone from the AI log. B2B adds no AI service and no charge of its own: the AI app or AI company you choose bills you directly. Everything is in B2B's **AI** tab.

What the AI can read and prepare

B2B registers its AI tools with WordPress's own Abilities API (WordPress 6.9 or later), so every AI tool that uses it can work with B2B: WordPress's MCP Adapter, WooCommerce MCP, connector plugins such as WPVibe or StoreAgent, and WordPress 7's AI features.

The AI can	Using
Find a record by name, email, SKU or ID	Find B2B records
Read settings and records as they are saved	Inspect B2B settings or a record, Read a page of B2B records
Calculate the price an approved account pays for a product and quantity	Calculate a business customer's price
List business customers with status, group, last order date, paid orders and lifetime spend	List business customers
Read the business sales report for any dates	B2B sales report for any dates
Check diagnostics, preview saved emails, open private documents	B2B diagnostics, Preview a saved B2B email, Link to a private B2B document
Read the license status (never the key)	B2B license status
Read the AI log and the changes waiting for you	B2B AI activity
Prepare any of B2B's 70 reviewed changes for your approval	List the B2B changes an AI can prepare, Describe one B2B change, Prepare a B2B change for the owner's approval, Status of a prepared B2B change
Give you the steps to make a change yourself	Show how to make a B2B change by hand

The 70 changes cover business defaults and the store mode (mixed, business only or catalog), the order form, business groups, accounts (status, group, terms and private notes), exact product prices, catalog and quantity rules, account, group and default terms, order limits, price books with their rules, quantity bands, cart discounts, coupons, display, import and restore, customer-role prices, applications and their questions, customer roles, page access, quotes and quote setup, tax exemptions, company teams and purchasing, agency licensing, notification settings and tests, the workspace, license checks and safe removal. Before it prepares a change the AI finds the exact record and reads its current values.

A signed-in customer's own AI, and the shopping assistant, can use three more: **My business account** (their account, group and company role), **My business prices** (their own price per unit for products they may see and buy) and **My quotes**. They show only that customer's own data.

Connect Claude Desktop, Claude Code or Codex

1. Make WordPress's MCP Adapter available: in WooCommerce, open **Settings → Advanced → Features** and switch on **WooCommerce MCP**, or install WordPress's MCP Adapter plugin. The AI tab's **MCP** line says **Ready** once it runs; **Not started** means the adapter is there (WooCommerce 11.2 and later include it) but WooCommerce MCP is still off and no MCP Adapter plugin starts it.

2. Create an Application Password for the WordPress user the AI should act as (a Shop manager is enough) under **Users → Profile → Application Passwords**. Name it after the AI app, for example "Claude Desktop": the AI log shows that name.
3. In the AI tab, under **Connect Claude, Claude Code or Codex**, copy the setup for your app, replace APPLICATION PASSWORD with the password (and the user name if the AI uses another user), and add it as the tab says: Claude Desktop under **Settings → Developer → Edit Config**, Claude Code and Codex with the command in a terminal. The setup runs WordPress's MCP bridge through npx, so the computer needs Node.js.

B2B's MCP address is your site address followed by /wp-json/affstackdev-b2b/mcp; it lists only B2B's tools. claude.ai and ChatGPT on the web sign in to a store through a connector plugin that adds their sign-in (WPVibe or StoreAgent, which need an account with their maker) or through AffStackDev AI; B2B's tools appear there by themselves.

Approve or reject a change

A change an AI prepares appears under **Changes waiting for your approval** in the AI tab, and as a card in the chat when the chat prepared it. Open it: B2B prepares it again from what is saved now and shows each value under **Now** and **After approval**, what else happens (for example an email to the customer), and whether you can undo it afterwards. If B2B changed after the AI prepared it, a note says so; the values shown are the current ones.

Approve and save saves exactly the values on the screen, once, through B2B's normal checks. If anything changed after you opened the page, nothing is saved; open the change again to see the new values. **Reject** discards it. A change that waits longer than 7 days expires.

If B2B could not confirm whether an approved change was saved (for example because the database connection dropped), the change shows as uncertain and B2B holds further AI changes until it is cleared. Open it and choose **Check what happened**: B2B reads its own record of the operation and either marks the change saved or, when it was not saved, marks it not saved and allows AI changes again.

Undo a change

A saved change that changed settings or records has **Undo** in the AI log. Undo shows each value it writes back under **Now** and **After undo** and restores only the values that change set. If someone changed those values afterwards, undo is refused so it never overwrites newer work; change them on their screen instead. Undo can also remove an exact price or catalog rule the AI created, and add back one the AI removed (with a new ID).

The log says when a change cannot be undone and why: a new business group or price book stays (edit or unpublish it on its screen); a change that emailed, offered or sent something (quotes, tax decisions, invitations, test emails, an account status change) cannot be taken back; license, agency and removal changes have their own steps; a published page and customer roles are changed in Pages and in Applications.

The AI activity log

The **AI activity log** in the AI tab lists everything an AI did with B2B in the last 90 days: every read, prepared change, approval, rejection, saved change, undo and chat message, with the time (UTC), who, how it connected (MCP, WordPress abilities, the B2B chat, the shopping assistant, AffStackDev AI or WP-CLI) with the Application Password's name, the result, and the AI model for B2B's chats. Filter it by kind of entry and by connection. Changes waiting for you link to their review; saved changes that can be undone have **Undo**.

Choose what AI may do

Under **What AI may do** in the AI tab:

Switch	Effect
AI may use B2B	Off pauses every AI route at once: MCP, WordPress abilities, both chats and AffStackDev AI's B2B actions.
Read-only	AI can read B2B but cannot prepare changes.
Outside AI apps may use B2B	Claude, ChatGPT, Codex and other apps through MCP or WordPress abilities, WP-CLI and AffStackDev AI. Off leaves only B2B's own chats.
Outside AI apps may prepare changes	Off: outside apps may only read, and changes can still be prepared in B2B's own chat.
Changes AI may prepare for your approval	One switch for each group: store setup; accounts and groups; prices and discounts; applications and access; quotes; tax exemptions; company purchasing; agency licensing; license and removal. A group that is off cannot be prepared, and the AI is told why.
Chat in B2B's screens, Chat button	The chat, on every B2B screen or only on the AI tab.
AI company for the chats	Automatic, or one of the AI companies set up in Settings → Connectors.
Shopping assistant for business customers, most messages per day	The assistant for signed-in business customers and the store's daily limit for it.

A new installation starts with AI on for B2B's chats and outside apps, changes prepared for your approval in every group, the chat on and the shopping assistant off. A developer can pause AI or make it read-only for a site in wp-config.php with `define( 'AFSD_B2B_AI_DISABLED', true );` or `define( 'AFSD_B2B_AI_READ_ONLY', true );`; the AI tab then says so.

Chat in B2B's screens

The chat needs WordPress 7.0 or later and one AI company set up in **Settings → Connectors** (Anthropic, Google or OpenAI: its provider plugin and your own API key). B2B uses that key; your AI company bills each message. The AI tab says what is missing.

Open **B2B AI chat** at the bottom of a B2B screen and choose the answer mode: **Prepare changes for my approval**, or **Show me how (change nothing)** for the steps to make the change yourself. A prepared change appears under the answer as a card with each value under **Now** and **After**; **Approve and save** saves it, **Reject** discards it, and **Open in B2B > AI** opens its full review. The chat can only use B2B's own tools, and every message and the model that answered are in the AI log. The chat remembers your last eight questions and its answers for two hours; **New conversation** starts again.

Shopping assistant for business customers

When you switch it on, signed-in customers of approved business accounts see **Ask about your prices** on the shop, product, cart and account pages. It finds products they may order and gives their own business price per unit for a quantity (before tax, coupons and cart discounts), their account and their quotes. It uses your AI company from Settings → Connectors, answers at most 30 messages per customer per hour and stops for the day at your daily limit.

With AffStackDev AI

When AffStackDev AI is installed, its claude.ai and ChatGPT sign-in and its review workspace use the same 79 B2B actions as before. Their B2B reads and changes also appear in B2B's AI log, follow the switches in B2B's AI tab, and a change saved there can be undone from B2B's log in the same way.

Glossary

Term	Meaning
Business account	The B2B record associated with a customer or company account; it has its own approval state and business terms.
Business group	A named set of account terms that can be assigned to business accounts. Some internal fields use the word program.
Account type	A registration choice that determines the application questions and approval behavior.
Audience	The classification used to decide whether a customer or saved order belongs to a business or retail flow.
Inherit	Use the applicable value from another level rather than supplying an override at this level.
Explicit zero	A saved zero with its own effect; it is not the same as leaving a value unset or inherited.
Price book	A set of product or variation pricing entries used by the applicable business pricing policy.
Quantity tier	A pricing rule selected according to its quantity threshold and the applicable product and account scope.
Quote	A recorded request and negotiation with buyer requirements, line items, revisions and a controlled checkout lifecycle.
Snapshot	Saved facts captured at a specific point so later decisions do not silently substitute current values for historical ones.
Revision	The saved version of a record or settings set, used to detect changes before another operation proceeds.
Company buyer	A company member permitted to purchase subject to the company's role, approval and spending rules.
Purchase approval	Permission for a specific prepared purchase; it does not reserve stock or company budget.
VAT	Value-added tax; B2B can record and validate VAT information through its implemented tax workflows.
Commerce Core	The shared AffStackDev runtime that coordinates supported ownership, audience, policy and transaction contracts.
Participant	A registered owner of part of a coordinated checkout operation, with its own validation and transaction responsibilities.
Receipt	Evidence of a recorded operation or decision; its meaning and ownership depend on the corresponding contract.
Protected update	A plugin update whose package identity, signature and file inventory are checked before installation.