Fube

GUIDE

How to receive orders from your customers with the portal catalogue



> ‘Could you send me another twenty boxes of the usual?’ If you work with customers who place repeat orders, you know what comes next: the email, the call to confirm the reference, the sales order typed in by hand. The customer portal catalogue turns this around: each customer logs in to their portal, sees the products you choose, adds them to a basket and confirms. The order reaches you in Fube as a draft sales order, and you decide what to do with it.

This guide explains how to create the catalogue, how to decide what each customer sees, how to open it up to orders and where they reach you.

Before you start

- **The portal up and running.** The catalogue is just another module of the customer portal, so you need the portal with its address set up and to have given the customer access with their email. If you don't have it yet, start with the guide to **activating the customer portal**. The portal isn't included in every plan: on **pricing** you can see which ones include it.
- **Your products set up and active**, with their price and their tax. The catalogue doesn't create products: it picks from the ones you already have. If any are missing, the guide to **creating your catalogue of products and services** explains how.
- **Permission to manage the portal.** The catalogues tab is only visible to those who can manage the portal, not to those who can only view it. If you can't find it, it's down to your role.

How it works, in three ideas

1. A **catalogue** is a named list of products. You can have several: a general one, one for wholesalers, a seasonal one.
2. Each customer sees the products in **the catalogues assigned to them**. If they have none assigned, they see the **default catalogue**.
3. When the customer confirms an order, Fube creates a **draft sales order** with the source ‘Customer portal’. Nothing gets invoiced on its own: you review it.

Step 1 · Create the catalogue

In the Fube app, go to **Sales** → **Customer portal**, **Catalogues** tab, and click **New catalogue**.

1. Give it a **name** (‘General catalogue’, ‘Wholesale price list’…) and, if you like, a **description**. Both are for you: your customer doesn't see them, they go straight to the products.
2. Leave **Active** switched on. Nobody sees an inactive catalogue in the portal.
3. If this is the catalogue all your customers should see except those who have their own, switch on **Default**.
4. In **Assigned products**, search for and add the products you want to offer.
5. In **Assigned customers**, add the customers who should see this catalogue instead of the default one. For a general catalogue, leave it empty.

Save. The catalogue appears in the list with its status, whether it's the default, how many products and how many customers it has. Click a row to edit it; from the row menu you can activate or deactivate it, mark or unmark it as default and delete it.

Step 2 · Decide what each customer sees

There is just one rule, and it's worth being clear about it before setting up several catalogues:

- **A customer who is in one or more catalogues sees all of them combined**, and only that. The default no longer applies to them. If the same product is in two of their catalogues, it appears once.
- **A customer who isn't in any catalogue sees the default.**
- **There is only one default.** If you mark another one, the previous one stops being the default on its own; you don't have to go and unmark it.
- **A deactivated catalogue doesn't count.** Its customers see the default for as long as it stays switched off.
- **Assigning an empty catalogue leaves the customer with no products.** The assignment takes precedence: if you give them a catalogue with no products, they don't see the default, they see nothing.

And on the product side: the portal only shows **active** products, with the **tax from their record** and **that customer's price**: their own price if they have one, otherwise their price list's and, failing that, the price on the product record. The catalogue decides which products they see; prices aren't set per catalogue. To have a group of customers see and pay different prices you don't need to duplicate products: give them a price list, as explained in **price lists and prices per customer**.

Your customer **orders exactly from what they see**: a product that isn't in their catalogues can't be ordered, not even by typing its address in by hand.

Step 3 · Switch on the catalogue and orders

Creating the catalogue doesn't publish it. You still need to switch it on in the portal, in the **What your customers see** list. You'll find it in two places, and it's the same one: in the setup of **Sales → Customer portal**, if you haven't opened the portal yet, and in the **Settings** tab of that same portal, if it's already open.

1. Tick **Catalogue and orders**.
2. Check **Can place orders**, the switch that appears next to it when you tick it. It comes switched on: with the catalogue enabled, your customer can order. If you switch it off, the catalogue becomes **view-only**: your customer sees the products and their prices, but has no basket or orders tab. Without **Catalogue and orders** ticked the switch doesn't appear, because without a catalogue there's nothing to order.

There's no save button: each change is saved instantly.

Settings for a specific customer

Sometimes you want it to be different for one customer: one who can only view prices, or another who doesn't see the catalogue. You do this in the **customer record, Portal tab** (in **Sales → Customers**, or with **Open their record** from the portal's **Customers** tab). In the **Their portal** section:

- **What they see**: **Same as your portal** or their own modules. A customer's settings **can only remove**, never add: you can't show the catalogue to a customer if you have it switched off for everyone. And if you choose their own modules, anything you switch on later for everyone won't reach them until you tick it for them or go back to **Same as your portal**.

- **Orders**, if they see the catalogue: **Same as everyone else** or **Cannot order**. It works in one direction only: you can stop a customer from ordering even if everyone else can, but you can't let them order if you have orders switched off for everyone.
- **Catalogue**, if they see the catalogue: which catalogues are assigned to them. You can tick and untick them from here, and it's the same as adding or removing them in the catalogue's own **Assigned customers** (step 1). If they have none, they see the default.

Step 4 · What your customer sees and does

When your customer logs in to their portal with their email, they see the **Catalogue** tab:

- They see each product with its name, its reference, its category, the description and **their price** —from their price list or their own, if they have them—, with the tax rate alongside. They can **search by name or by reference**, and the list shows thirty products at a time.
- If your products have categories, next to the search box there's a drop-down to pick one: **All categories**, or whichever they choose. Only categories that have products in their catalogue appear, and the chosen one stays in the page address, so they can bookmark it or go back without losing it.
- Clicking the **name of a product** opens its page: the full description, which is shortened in the catalogue, the reference, the price with its tax and the same **Add** button. The category on the page takes them to the catalogue filtered by it, and **Catalogue**, at the top, to the list. There are no photos: products don't have them.
- With **Add** and the plus and minus buttons they build up the order. The basket is kept as long as that browser tab stays open; if they close it, they start from scratch.
- In the **basket** they review the lines, see the amount for each one and the total with the taxes that apply —calculated by Fube, not an estimate from the browser—, can leave you a note and click **Send order**.
- Once sent, they go to the **Orders** tab, where they have their history with the status of each order. That status is whatever you set in Fube.

If they click **Send order** twice in a row with the same basket —the usual double click—, you don't get two sales orders: Fube recognises the same order for two minutes and returns the first one.

Step 5 · Receive and manage the sales order

Portal orders arrive in **Inventory** → **Sales orders**, like any other sales order:

- They arrive with the status **Draft**, the source **Customer portal** and their own numbering: **PORTAL-1**, **PORTAL-2**... so they don't get mixed up with your manual sales orders.
- To see them together, filter by the **Source** column.
- Each line carries that customer's price at the time of ordering — their own, their price list's or the one on the product record: the same one they saw in the catalogue — and the tax from the product record. The customer's note stays on the sales order.

From there it's your usual workflow: you review the sales order, adjust whatever is needed and, once you're happy with it, invoice it with **Generate invoice** in its menu. In Fube a sales order doesn't become a delivery note: it's invoiced directly. The guide **from sales order and delivery note to invoice** explains it step by step.

The notification that an order has come in

You don't need to be watching the list: as soon as a customer confirms an order, Fube notifies **everyone on your team who can see sales orders**, in two ways:

- **In the Fube bell**, with the sales order number, the customer and the amount. Clicking it opens that sales order.
- **By email**, with the same details, any note the customer has left and a button to view the sales order.

Anyone who doesn't have permission to see sales orders receives nothing: they wouldn't be able to open it.

The email follows your company's email settings: it goes with the **notification emails**, so if you have them turned off in **Settings › Notifications › Email**, the notification reaches the bell but the email doesn't. That setting applies to the whole company, not to each person; the guide on **choosing which emails you receive from Fube** explains it.

Edge cases and common errors

- **‘My customer can't see the Catalogue tab’.** It isn't turned on for them: check **What your customers see** in the portal's **Settings** tab and, if you've given them their own modules on their record, check those. To be sure, open it with **View as this customer**, from their record or from their row in the **Customers** tab: you'll see their portal exactly as they see it, without notifying them.
- **‘They can see the catalogue, but it's empty’.** Check which catalogues they have assigned: if they have one with no products, or all its products are inactive, they see nothing. If they have none, check that there's an active default one.
- **‘The Add button doesn't appear for them’.** Orders are turned off, either in general or on their record. If you're looking at it yourself with **View as this customer**, the button always appears disabled there: you can't place orders in the preview.
- **‘The category drop-down doesn't appear for them’.** It only appears if any of the products they see has a category. The category is set on each product's record.
- **‘A product appears that shouldn't’.** Check which catalogues that customer is in: they see the combination of all of them. Removing it from one isn't enough if it's still in another.
- **You deactivate a product that was already in a basket.** It disappears from the catalogue and, if the customer tries to send the order with it inside, it's rejected. They should remove it and send it again.
- **You remove a product from the catalogue.** Orders they've already placed stay as they were; it simply stops appearing for future ones.

Frequently asked questions

Can I show different prices to each customer?

Yes. Give the customer a price list, or their own price for a product, and their portal shows and charges them that one: in the catalogue, on the product page, in the basket and on the order. Anyone with neither a price list nor their own price sees the one on the product record. There's no need to create products per price list.

Does my customer pay when placing the order?

No. The catalogue has no payment gateway: the customer orders and you invoice and collect payment as usual.

Do I get notified when a customer places an order?

Yes: in the Fube bell and by email, to everyone on your team who can see sales orders. The email can be turned off for the whole company with the notification emails; the bell notification always arrives.

Can I have a catalogue just for checking prices?

Yes. Turn off **Can place orders**, in the **Settings** tab of **Sales** → **Customer portal**: your customers will see the products and their prices, with no basket. You can do this for everyone or just for some customers, from the Portal tab on their record.

Can a customer be in several catalogues?

Yes, and they see the products from all of them together. It's useful for combining a base catalogue with another for offers or seasonal products.

Is it an online shop open to the public?

No. Only the people you give access to with their email can get in, and each one sees what belongs to their company. If what you're after is selling in your online shop, that's done through **invoicing orders from your online shop**, which is something else.

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