

# B2B Edition Open Source Buyer Portal

GitHub Repo with setup instructions : <https://github.com/bigcommerce/b2b-buyer-portal>

<ul style="list-style-type: none"><li>- what it is -<ul style="list-style-type: none"><li>● REACT.js powered front-end experience for B2B Edition</li><li>● Extensible using standard Node.js functionality</li><li>● Ready-to-Deploy</li><li>● Portable</li></ul></li></ul>	<ul style="list-style-type: none"><li>- what it isn't -<ul style="list-style-type: none"><li>● Re-skinning of the Stencil version</li><li>● Built into your theme (yet)</li><li>● Structured like your theme (but could be)</li><li>● Strictly server- or client-side functionality</li></ul></li></ul>	<ul style="list-style-type: none"><li>- what it can do -<ul style="list-style-type: none"><li>● Pull any data for a logged in customer (via graphql)</li><li>● Pull any BigCommerce product or page data (via graphql)</li><li>● Restrict access to specific data</li><li>● Provide a unique experience per customer</li></ul></li></ul>
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## How do I ...

<ul style="list-style-type: none"><li>- add new pages to the interface -<ul style="list-style-type: none"><li>● Create the new page in the Pages directory either as a folder with an index.tsx file or as a new .tsx entry</li><li>● Create a route for the page in the Routes file, including component data and permission data</li></ul></li></ul>	<ul style="list-style-type: none"><li>- restrict data for specific customers -<ul style="list-style-type: none"><li>● Give B2B customers the specific permissions in the backend</li><li>● For a full page, include the relevant permissions</li><li>● For partial pages, update the code to check for those permissions before displaying data</li></ul></li></ul>	<ul style="list-style-type: none"><li>- add new components -<ul style="list-style-type: none"><li>● Create the new component in the Components directory either as a folder with an index.tsx file or as a new .tsx entry</li><li>● Make sure to export the component from its file</li><li>● Include the component by reference in the page(s) and/or components that will use it.</li></ul></li></ul>
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## Pre-Requisites

<ul style="list-style-type: none"><li>● Experience with the following:<ul style="list-style-type: none"><li>○ Node.js and specifically REACT.js</li><li>○ TypeScript</li><li>○ GraphQL</li><li>○ BigCommerce theme and data structures</li><li>○ B2B Edition and customer permissions</li></ul></li></ul>	<ul style="list-style-type: none"><li>● Access to the following:<ul style="list-style-type: none"><li>○ A Node.js environment with usable NVM and NPM tools (version &gt;= 18.0.0)</li><li>○ A BigCommerce store with B2B Edition and Buyer Portal enabled</li><li>○ BigCommerce Script Manager and API Playground</li></ul></li></ul>	<ul style="list-style-type: none"><li>● Patience</li><li>● Good collaboration skills</li></ul> <p>And above all else, the adaptability required to find innovative solutions to complex problems.</p>
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<ul style="list-style-type: none"><li>- <b>A note on creating pages and components</b> - During build-time, yarn will throw errors for unused variables. This is not an issue for live sandbox testing but should be considered when doing deployment builds (live or sandbox).</li></ul>	<ul style="list-style-type: none"><li>- <b>A note on creating routes</b> - Routes have a minimum requirement at build time but not development. That is path, name, wsKey, isMenuItem, component, configKey, permissions, permissionCodes, isTokenLogin, idLang.</li></ul>	<ul style="list-style-type: none"><li>- <b>A note on customer and store data</b> - Only certain data is available, limited by what can be pulled in GraphQL. In addition, calls for data are generally made pre-load (with the exception of products), so it must be pulled during setup to use.</li></ul>
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## Client Specific Needs

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<ul style="list-style-type: none"><li>- Responsive product properties within Buyer Portal</li><li>- Non-intrusive design and implementation</li><li>- Returns workflow</li><li>- Quoting limited per company</li></ul>	<ul style="list-style-type: none"><li>- what is possible -<ul style="list-style-type: none"><li>● Importing product data via GraphQL</li><li>● Importing order data via GraphQL</li><li>● Using CSS and JavaScript to redirect display workflows</li><li>● Checking company data via GraphQL</li></ul></li></ul>	<ul style="list-style-type: none"><li>- possible roadblocks -<ul style="list-style-type: none"><li>● How are features implemented? [some features are not easy to import and parse depending on implementation]</li><li>● How advanced is the theming of the site? [some theming can be difficult to match with REACT]</li></ul></li></ul>
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## Responsive Products

<ul style="list-style-type: none"><li>- Save responsive code in an easily accessible field -<ul style="list-style-type: none"><li>● Commonly, this behaviour is affected through theming, but theme-specific data can be difficult to recover.</li><li>● If behaviour is directly in Product Description, it should be tagged with an ID that makes it easy to parse out.</li><li>● Responsive code in script manager can have erratic behaviour if not controlled for</li><li>● <b>[BEST]</b> Use a custom field, and hide it from the customer on the product page</li></ul></li></ul>	<ul style="list-style-type: none"><li>- Pull responsive code when referencing product -<ul style="list-style-type: none"><li>● Quotes and Quick Order are the primary places where this can be an issue.<ul style="list-style-type: none"><li>○ When displaying products, conditional options are not honoured.</li><li>○ When getting pricing, advanced pricing requires care.</li></ul></li><li>● May be helpful to have separate versions of code for Buyer Portal specifically.</li><li>● <b>[OPTION]</b> Update components to show product quick view.</li></ul></li></ul>	<ul style="list-style-type: none"><li>- Alternatives -<ul style="list-style-type: none"><li>● Add code to enforce intervention (unpurchasable, out of stock, et c) from your team.</li><li>● Limit responsive product functionality when possible. [Decrease the call load on product data.]</li><li>● Make responsive behaviour replicable where possible. [In order to pre-load into the Quote and Quick Order pages]</li><li>● <b>[BEST]</b> Hard code responsive behaviour into Buyer Portal as part of the display component.</li></ul></li></ul>
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## Limited Quoting

<ul style="list-style-type: none"><li>- Update Companies to include permission -<ul style="list-style-type: none"><li>● Create a hidden Company field for “Allow Quoting” that your team can set or unset</li><li>● Make a decision for default value for “Allow Quoting”</li></ul></li></ul>	<ul style="list-style-type: none"><li>- Update Buyer Portal to check permission -<ul style="list-style-type: none"><li>● In Routes<ul style="list-style-type: none"><li>○ Pull permission for page access</li><li>○ Add to checks in the return section</li></ul></li><li>● In Components<ul style="list-style-type: none"><li>○ Pull permission for menu</li><li>○ Add to checks in return</li></ul></li></ul></li></ul>	<ul style="list-style-type: none"><li>- Alternatives -<ul style="list-style-type: none"><li>● If a company only has a single user, set their account as non-B2B and turn off quoting for personal accounts</li><li>● <b>[OPTION]</b> Create custom user roles and adjust code on User Management to only allow custom roles [Requires a bit less work after setup]</li></ul></li></ul>
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Code for these options is not currently available. Ideally, we want to encourage the simplest workflows, marked in **[BLUE]**

### Consistent Design

<p>- Buyer Portal operates as an app-like iframe that automatically enforces full window view -</p> <ul style="list-style-type: none"><li>● The controls for this are split between the initialisation step and the layout step and need to be adjusted in each place.</li><li>● Within Stencil themes, adjusting the Buyer Portal to the theme would require replacing both initialisation and layout to tell the system to display within a set box.</li><li>● Due to the nature of iframe layouts, work would need to be done to copy Stencil styles into Buyer Portal to maintain consistency.</li><li>● For Non-Stencil implementations, there is already more work to be done.</li></ul>	<p>- Buyer Portal was designed to be independent of theming framework and implementation -</p> <ul style="list-style-type: none"><li>● The intent behind Buyer Portal was to provide consistent experience while reducing design-specific work surrounding the implementation of B2B Edition front-end behaviours.</li><li>● Attempting integrate Buyer Portal with the theme re-introduces the work that Buyer Portal was intended to curb.</li></ul>	<p>- Idea : rebuild the Routes section of Buyer Portal to exist within a webpage, then enforce limited iframe space to keep functionality in line with design goals -</p> <ul style="list-style-type: none"><li>● The Routes and initialisation process for Buyer Portal enforces subpage endpoints with prefix #/ that places the app view into max z-index</li><li>● By changing the initialisation to enforce, e.g. account/ prefix and load into a specific page instead of global app positioning, the design and feature availability can be more effectively managed.</li><li>● <b>This method requires a LOT of work.</b></li></ul>
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### Returns

<p>- Returns function in a manner with relatively little API accessibility -</p> <ul style="list-style-type: none"><li>● While the code from the theme structure can be mimicked, it is unable to naturally pull return-specific data for orders without access to internal-API structures.</li><li>● API endpoints documented at dev.bc do not include the requisite ability to check for returnable products or return requests.</li><li>● Without API functionality, implementation of returns in Buyer Portal would require GraphQL access.</li></ul>	<p>- GraphQL has order data, but returns are missing -</p> <ul style="list-style-type: none"><li>● Because return-specific order data is unavailable, it is difficult to ensure data displayed within Buyer Portal will be accurate.</li><li>● Order data includes Order Status (Site &gt; Order &gt; Status), which means we can get the list of generally returnable orders, their products, et c. But we will not be able to confirm if specific products have been returned.</li><li>● Since the order return data is retrieved from the internal API with no GraphQL access, some other approach would be necessary.</li></ul>	<p>- Internal API is accessible on a page-by-page basis and includes return data -</p> <ul style="list-style-type: none"><li>● There is direct access to return data within the internal API. If an attempt is made to pull that data, it would need to be done within a page section that grants access to Buyer Portal.</li><li>● Because Buyer Portal sits atop the store's Stencil theme, most internal API data remains unavailable to Buyer Portal, but this may be able to be circumvented through in-line JS on a page.</li><li>● <b>This method is insecure and should not be used, but also is not available for headless implementations.</b></li></ul>
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