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The questionnaire is intended to support you in specifying your needs for the project implementation. If any of the questions are unclear, don't hesitate to get in touch with your sales representative. Based on the provided answers, a free project implementation cost estimate will be prepared.

**Instructions:** The questionnaire contains questions along with suggested answers, where we ask you to highlight one or multiple options. If additional information is important for a given point, please include it in the comment section under that point.

**The completed questionnaire** should be sent to the email address: sales@cstoreb2b.com

**Legend:**

Black font (yellow background) indicates points included in both the simplified and full versions of the offer.

Blue font (blue background) indicates points available exclusively in the full version of the offer.

Green font (green background) indicates points that require an additional fee for the full version of the offer.

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**1. Basic Information.**

1. Brief description of your business: ………….………….………………
2. Link to your sales platform or website: …………………….

**2. Project Objective.**

1. The primary goal of the project / what we want to achieve: ……………………………………………………

*Companies that have implemented a B2B platform have observed the following benefits
 (data according to Deloitte Digital report):*

* *Improvement in customer service levels - 42%*
* *Shorter order fulfillment times - 52%*
* *Time savings for sales representatives - 44%*
* *Optimization of sales department costs - 54%*
* *Increase in average order value (cross-selling, recommendations) - 28%*
* *Greater brand recognition - 36%*
* *Acquisition of new customers - 48%*
* *Increase in sales - 44%*
1. Number of **salespeople** or other individuals responsible for taking B2B orders: …………..
2. Monthly number of B2B **orders** handled by salespeople: ……………………………………..
3. Number of B2B **customers** serviced by salespeople: …………………………………………

**3. Integration with ERP (Enterprise Resource Planning) / financial warehouse software.**

1. **Integration with ERP software** on the CStore side and the IT department of the Purchaser or Manufacturer. Data exchange will be based on Web Service, XML, CSV, or database via a secure VPN connection. The cost of work for the IT department of the Purchaser or Manufacturer to provide data necessary for synchronization with CStore will be covered by the Purchaser.

Please provide the name of the software: …….…….

**4. Supported customer groups.**

1. Platform designed for **wholesale customer service**. Verified and logged-in customers can make purchases.
2. Platform designed for **retail customer service**. Anyone can make purchases without the need to log in.

**5. Access to the platform.**

1. Platform available **only after logging in**. Non-logged-in customers see nothing except the login section.

*(Example:* [*https://www.vive.pl/login*](https://www.vive.pl/login) *)*

1. Platform in the form of a **product catalog available** to everyone with hidden prices or catalog prices. Ordering is possible only after logging in.

*(Example:* [*https://www.amtexport.eu/*](https://www.amtexport.eu/) *Ordering is only available after logging in. Salespeople can utilize the platform to present the product catalog and optionally display list prices to potential customers.)*

1. Platform **allowing orders to be placed by everyone**, including non-logged-in customers. Wholesale customers have access to their individual offers after verification.

**6. Registration of a new customer.**

1. **Allowed option for new customer registrations** (requires administrator approval for new registrations). A new customer fills out a registration application providing company details (including registration and contact information, and consent agreements). The application is recorded in the administrative panel. The administrator receives a notification about the new customer access request. The administrator independently verifies the customer and manually adds them to the ERP.
2. **Blocked option for registering new customers.** Customer records are created manually.

**7. Customer database and sub-accounts.**

1. **The customer database will be imported from ERP**, including payer data and multiple shipping addresses. We import only selected customers flagged in ERP with "B2B platform access". After creating the customer profile in CStore, the administrator manually sends a welcome email with login credentials from the CStore panel. The email is generated by CStore. Customers themselves cannot change their data directly; they can fill out a form requesting data changes, which is sent via email to the administrator and logged in the administrative panel under requests.
2. We **do not import the customer database from ERP.** Customer profiles will be manually created by the administrator on the platform.
3. Customers have the **option to report a new delivery address**, which is then subject to administrator approval (without approval, the address is not available for ordering). When ordering, a new shipping address is added to the ERP.
4. Customers **flagged as dropshipping** can independently **add new delivery addresses**, which are immediately available for ordering (no prior verification by the administrator required). When ordering, the new shipping address is added to the ERP as a one-time address.
5. **Employee accounts.** Clients or administrators, after logging into the client account, can create employee accounts linked to the main account. Each sub-account has its own email, password, and the name of the employee. Permission levels include viewing financial information (settlements, invoices, balances) or not. When an order is placed from a specific employee account, the system records that the order was placed by that particular person. Employees can view all orders from the entire company.
6. **Branch accounts.** Clients or administrators, after logging into the client account, can create branch accounts linked to the main account. Each sub-account has its own email, password, and the name of the branch. Permission levels include viewing financial information (settlements, invoices, balances) or not. When an order is placed from a specific branch account, the system records that the order was placed by that particular branch. Branches can only see orders placed through their account and do not have access to orders from other branches.
7. **Distributor accounts.** Distributor accounts can create accounts for their customers with a specified percentage markup on the entire price list (one markup for the entire assortment). End customers logging into such accounts see prices with the markup applied and only those prices. The distributor's account sees all orders from all its customers, indicating the price at which the customer purchased the items and the distributor's price with the specified markup (showing the distributor's earnings on that transaction). End customers only see their own orders. Each order by a customer requires approval by the distributor; without approval, the order is not processed. The distributor receives an email notification upon a new order. Once approved and forwarded for processing, the client receives a notification.

**8. Language versions:**

1. **English language version.**
2. **Several language versions**. Translations are to be individually provided by the Purchaser.

Please specify language versions: English …………….

**9. Estimated number of product records within the first 12 months**

1. Approximate number of product records: …………………

**10. Product records and visibility**

1. We **import products from ERP or PIM with full product details**, including name, assortment group, attributes, photos, descriptions, etc.
2. Initially, we want to **import products using a CSV (Excel) or XML file** provided by the Purchaser or generated by the current online store.
3. Products are **manually entered** in the administrative panel.
4. **All customers see all products.**
5. **Limited product visibility based on price lists**. Customers only see products assigned to their price list. A customer without a general price list or an individual price for a specific product does not see that product after logging in.
6. **Limited product visibility based on categories.** By default, customers see all products from selected assortment categories. For other categories, the administrator specifies which assortment groups (categories) are visible to each customer. After logging in, a customer sees only their designated products. Other customers do not see these products.
7. **"Your Products" tab.** Dynamically generate the "Your Products" tab based on the customer's order history for the last 1, 3, 6, and 12 months. This section will automatically display products that the customer has previously ordered.
8. **Individual product codes for customers.** We retrieve information from ERP regarding individual product codes for each customer (e.g., a customer has their own code for a specific product from our catalog). After entering these individual codes, customers can search for them using the search function. When a customer searches for such a code, the corresponding product is displayed to them, but the code itself remains hidden and is not shown to the customer.

**11. Sales of packages and product associations.**

1. **Product Sets / Packages.** At CStore, we define sets of products consisting of Product A x 1 piece, Product B x 3 pieces, and Product C x 5 pieces, and specify a single end price regardless of the quantity ordered by the customer. CStore dynamically calculates the availability of the set based on the components included. On the product page, customers see the components of the set, individual prices of products, and the set price. When a customer places an order, the set is broken down into individual products in the administrator panel, and the price of these products is calculated proportionally to any discount applicable to the set. The order notes indicate that the products were separated from a specific set.
2. **Related Products.** Products are linked within the CStore platform. Customers see on the product page that this product has similar properties or comes in several variants (e.g., colors, and sizes).
3. **Complementary / Supplementary Products.** Administrators can independently link complementary products within CStore. They select a group of products (lowest level) and assign a specific product to it (one or several products). On the product page, customers see a section for complementary products; for example, for a phone product, they might be recommended for phone cases.

**12. Stock levels.**

1. **We synchronize the stock with the ERP.** We sell up to the amount of stock. We present to the customer how much we have in stock in units or ranges e.g. 10-20, 21-50, 50+, etc. Ranges to be set in the administration panel.
2. **We allow sales below stock.** We show the customer the planned availability of a product if they order above the available stock, for example, a product available in 5-7 days.
3. **Split orders according to availability.** When placing an order, we allow for the possibility of placing an order for products that are in stock locally and products that are in stock externally (on request). During the ordering process, we ask the customer whether they wish to have their order processed in its entirety (which involves longer lead times) or split the order into two, according to product availability, i.e. products available from the local warehouse are dispatched immediately and products from the external warehouse are dispatched in a separate order (which involves charging shipping costs twice or verifying logistics minimums for processing two shipments). In the case of splitting an order into two, two separate orders are sent to the ERP according to product availability.
4. **Notification of product availability.** A customer can sign up for availability notifications when a product is out of stock. Ability to view in the administration panel which customer, when they signed up, and for which products. When a product is in stock, the customer gets an automatic email notification.
5. **Ask for an individual price quote.** The customer has the option to send a request for a larger quantity of a given product. In the form, he or she enters the expected quantity for the order and optionally a comment. The request is registered in the platform and sent by e-mail to the administrator.
6. **Contracting of future orders** *(e.g. a container that is coming to us*). Products that have a pre-sale/contracting flag (and a specific planned delivery date) are available for sale in a defined quantity, assuming they are out of stock. A customer can only order multiples of the same product in one order. In the shopping cart, we cannot mix products for pre-order/contracting and products that are in stock. The customer can see the planned delivery date on the product card (one date per product). If a customer orders a pre-sale / contracting product, it will appear in the order list in the administration panel in a separate "pre-sale / contracting" section. The order will hang there until the goods appear in stock. As soon as the goods appear in stock, the "pre-sale / contracting" flag disappears and the pre-sale orders automatically go into processing. The administrator has the option to export the list of future orders to a CSV (Excel) file with information on customer details, products, quantities, etc.

**13. Downloading the product database from external suppliers.**

1. We **only sell products that we have in our ERP program.**
2. We **integrate with external product suppliers** in order to complete the availability information from the external warehouse (from the external supplier) on our sales platform. The customer can see on the platform how much product we have locally available, and what the availability of the product is in the external warehouse at the supplier. List of wholesalers for integration: .................

**14. Packaging units: primary and auxiliary.**

1. **Single Selling Unit.** Products are sold in a single unit without the customer choosing the type of packaging. Each product has only one defined unit. In ERP, each product has a separate record in the chosen unit.
2. **Multiple Sales Units for the Same Product.** Within the CStore platform, we assign sales units as the primary sales unit (e.g., piece, meter, kilogram) and auxiliary units (e.g., bulk packaging), or we retrieve conversion factors from ERP. For each product, we can optionally set auxiliary units (e.g., bulk packaging) and specify how many individual products fit into the bulk packaging for that product. On the product page, customers can select the unit in which they wish to order. After an order is accepted and forwarded to ERP, the auxiliary unit is converted into the primary unit, or the order is added to ERP in the sales unit in which it was sold (depending on the structure of unit records in ERP, to be determined during implementation).

**15. Price lists.**

1. Setting Prices and Discounts. Prices and discounts are **configured exclusively within the CStore platform**. We do not retrieve them from ERP.
2. **Supported Currencies.** We conduct sales in the following currencies: EUR, ………...
3. **Number of basic price lists (base)** retrieved from ERP, from which further discounts are calculated: ......
4. **Percentage Discounts from ERP.** We fetch percentage discounts from ERP for specific customers on selected assortment groups or top-level categories.
5. **Contractual Price.** The contractual price for a specific product is fetched from ERP for a customer, who buys at this specified price regardless of other discounts.
6. **Promotional Price Lists.** Promotional price lists are fetched from ERP for selected customers. CStore compares prices from percentage discounts off the basic price list and promotional price lists. If the promotional price list offers a better price, the product is sold at the promotional price.
7. **Bulk Packaging Discount.** Depending on bulk packaging, customers are entitled to a % discount on products. The discount percentage is set uniformly across all customers in CStore.
8. **Order Value Discount.** Depending on the order value, customers are entitled to a % discount on products. The discount percentage is set in CStore for specific customer groups (different customer groups have different discount percentages).
9. **Quantity Discount**. Depending on the quantity ordered of the same product, customers are entitled to a % discount on products. The discount percentage is set uniformly across all customers in CStore.
10. **Promotion Mechanism.** If a customer buys X units or places an order worth X EUR on any products or products from selected categories (one or multiple lowest-level categories), they receive a % discount on the ordered products or a % discount on the entire order. The discount may apply always or only to products without individually defined prices assigned to the customer. This promotion can be combined with other promotions or remain standalone.
11. **Promotion Mechanism.** Buy X units of a specific product, and receive an additional unit for 0.01 EUR or 1 EUR.

**16. Shipping.**

1. **Identical Logistics Minimum for All Customers.** All customers have the same logistics minimum threshold. Once exceeded, shipping is free. We inform the customer how much more they need to spend to qualify for free shipping.
2. **Individual Logistics Minimum per Customer.** Each customer has their own logistics minimum retrieved from ERP. Once exceeded, shipping is free. We inform the customer how much more they need to spend to qualify for free shipping.
3. **Cost Calculation Below Logistics Minimum.** Shipping costs below the logistics minimum are calculated based on the shipping country, weight, and package size, or set as a flat rate, regardless of the specified parameters.
4. **Waybill Import.** We import the waybill number from the ERP or WMS system.
5. **Customer Ability to Use Own Waybill.** Customers can use their own waybill during order placement. They import the waybill label and provide the waybill number. The administrator receives a notification along with the label to assign to the shipment. We do not charge additional fees to the customer for using their own courier.

**17. Payments.**

1. **Credit Terms for Selected Customers.** Selected customers can purchase on credit terms. We transfer information about payment terms from ERP (indicating which customers can buy on credit). Each customer may have a different defined payment term.
2. **Bank Transfer Prepayment Option.** Customers have the option to pay in advance via bank transfer.
3. **Online Payment System Prepayment Option**. Customers have the option to pay in advance using an online payment system.
4. **Cash on Delivery Option.** Customers have the option to pay upon delivery (cash on delivery).

**18. Order Acceptance.**

1. The order will be **transferred to ERP** where a sales order document will be created. The document type created will be "customer order."
2. Customers have the option to **import products into their cart from a CSV** (Excel) file. The file structure includes the EAN code or product index and the quantity ordered.

**19. Order History and Statuses.**

1. **Platform B2B Order History.** The order history in the platform consists of orders placed exclusively through the B2B platform. Customers can view their orders and reorder them.
2. **All Channels Order History.**  The order history in the platform includes orders placed through all channels and reflects data visible in the ERP system (document type in ERP = order). Customers can view their orders and reorder them. Order statuses are retrieved from ERP and include statuses such as received, on hold, in progress, canceled, and fulfilled. Customers are notified of any changes in order status.

**20. Invoices and Settlements.**

1. **Settlements and Invoices from ERP**. We retrieve settlement details from ERP and present them to the customer as a list of invoices. This includes invoice dates, payments made, invoice values, and the remaining amount due for payment.
2. **Invoices in PDF Format.** The platform fetches invoices from ERP in PDF format and allows customers to download them after logging in. ERP provides ready-to-download invoice files, or if not available directly, the requester will store invoices in a dedicated folder from where CStore will fetch the files.
3. **Invoice Correction in PDF Format.** Invoice Corrections are obtained from ERP in PDF format and are available for download by customers upon login. ERP either directly provides these credit note files for download or stores them in a designated folder accessible to CStore for retrieval.

**21. Limit Purchase, Balance, Purchase Limit Control.**

1. **Purchase Limit.** We synchronize the client's purchase limit with data fetched from ERP.
2. **Balance.** We fetch the client's balance from ERP and present it to the client.
3. **Soft Debt Collection.** Upon exceeding purchase limits or payment terms, the client receives a notification requesting payment settlement. The client is notified of overdue payments, and their order undergoes additional verification by the accounting department. When adding an order to ERP, we include a comment indicating the need to check the client's payments.

**22. Salespeople and Quoting.**

1. **Assigning Salespeople to Customers.** We want to assign salespeople to customers. A salesperson should be able to log in to their account. The salesperson can log in to the customer's account and place orders on their behalf.
2. **Customer-salesperson relationships** will be managed at the **ERP level**.
3. **Shopping Lists.** A customer (or salesperson) can independently define multiple shopping lists on one account. Shopping lists can be edited, reused, or deleted. A shopping list can be transformed into an order.
4. **Quoting by Salespeople.** A salesperson can prepare a quote in the CStore platform for a specific customer with individual prices and quantities specified by the salesperson. The quote is sent via email by CStore to the customer and is visible after logging into the customer's account. The quote includes a "finalize order" button (on the PDF), which directs to the platform to finalize the quote.
5. **Quoting by Customers.** A customer can prepare a quote for their client within the CStore platform. Within the quote, the customer selects products from the CStore sales offering, can input additional items (custom text with service descriptions, for example), modify quantities, and prices, enter their client's data, and set a validity date for the quote. The quote can then be downloaded in PDF format and sent to the end customer. If our customer wants to accept the quote, they can do so through the platform by converting the quote into orders and quickly finalizing them for products available on the platform at prices reflecting their individual discounts.
6. **Salesperson Dashboard.** Salesperson upon logging into the platform sees key information: current month sales (ability to preview sales in previous months), list of recent customer orders, ability to filter orders by period, by specific client. Ability to view inactive customers (customers who have not placed orders in the last X days), ability to compare customers who have stopped buying recently (we compare the selected period e.g. the last quarter to the current and catch customers not active or with low purchasing activity). Mechanism of cyclical mail reports for the merchant on a given day each month, information on customers for whom the drop in turnover was over a specified% compared to the previous period
7. **CRM Module.** After logging into the platform, both the salesperson and the administrator have access to a module for managing relationships with current and potential clients, as follows:
- List of contractors (along with their addresses) presented on a map. The salesperson can view where each client is located (with a filter option to display only current clients or also potential clients not yet in ERP; potential clients are marked in a different color from current ones). There is also a filter based on the date of the last activity (e.g., clients not visited in the last X days). The filtered results are displayed both on the map and as a list of contractors below it.

- Ability to view detailed information about a specific contractor, including details about their recent orders, payment status, company headquarters address (a client can have multiple addresses, with one designated as the company headquarters), and contact information (name, surname, phone, email). The module allows for defining multiple contact persons independently of the sub-account module, with annotations specifying their roles in the team (custom text field).

- Task Planning. Tasks can be scheduled at the level of a specific contractor, categorized as meetings, initial offer submissions (for new clients), phone calls, or notes. Users can set the task date, name, and type. There's also the capability to view all tasks for a specific contractor and across all contractors assigned to a particular salesperson. Tasks can be filtered by type (the administrator can view tasks for all salespeople and tasks of all types). Tasks can be marked as completed, edited, or deleted.

- Post-Meeting Survey. After an initial meeting, a survey defined by the administrator must be completed by the salesperson (only if the client hasn't previously completed it). The survey is designed to gather or build a broader description of the company.

- Adding Potential Contacts. Users can add new contacts who are not yet clients and are not listed in ERP. For potential contacts, there's an option to add them to the map and define tasks. The system allows for reporting on the number of quotes submitted to potential clients within a specified timeframe. Users can review a salesperson's activities and tasks within a specified timeframe. There's also the capability to view inactive clients (clients in ERP who haven't placed orders in the last X days).

**23. Graphic Design.**

*Example of default B2B template (wholesale) -* [*https://www.amtexport.eu/*](https://www.amtexport.eu/)

1. **Minimal template customization, 8 hours of graphic changes.** Scope: Uploading logo and banners, color adjustments, and adding additional content on the platform.
2. **Basic template customization, 20 hours of graphic changes**. Scope: Uploading logo and banners, color adjustments, adding additional content on the platform, changing product card layout, and minor changes to the homepage...
3. **Development of an Individual Graphic Design Project.** The project is drawn by a graphic artist individually upon request or provided by the ordering party. Scope of the graphic design project: homepage design, product list, product card, text page, contact page. Based on the prepared graphic design project, implementation will be conducted.

**24. Additional Options.**

1. **Loyalty Program.** The program is available exclusively through the platform for selected customers. The administrator decides which customers have access to the program. Customers earn a specified number of points for purchases. On the product card, it displays how many points a customer will receive for the purchase. Customers also see a summary of their points (current balance and history of earning and deducting points). We establish a fixed conversion rate, e.g., 1 PLN = 1 point. Points are credited when an order status changes to fulfilled/shipped. Points are calculated only for orders placed through the platform. Additionally, the system supports promoting specific behaviors, e.g., place an order by noon and receive an extra 50 points; order a specific product (or products from a specific lowest-level category) and receive three times more points than the standard. There's a Rewards Catalog where customers see a selection of products (available only to program participants) with defined point values for redemption. Upon reaching a point threshold for a specific product, shipping for that product is free. There is no option to pay with points and money simultaneously.
2. **Complaints.** After logging in, customers can submit complaints by filling out a form on CStore and entering additional fields (these fields will be defined by the Licensee). The form is sent via email to the customer and a specified email address for the administrator (designated person in the company handling complaints). On CStore's side, there is the capability to manually change complaint status and add comments. Customers cannot add additional comments to a complaint they have previously submitted. After logging into their account, customers can see a list of submitted complaints and their status of resolution.
3. **Surveys.** The platform allows periodic surveys for customers. The administrator defines the scope of questions and closed-answer options (A, B, C, etc.), as well as open-ended questions where customers can provide their responses. The survey's availability period for logged-in customers is defined by the administrator. Upon logging in, customers receive a prompt to fill out the survey, which they can either complete or ignore. The administrator can export survey results to a CSV file.
4. **Offer XML for customers with online stores**, containing product catalogs, availability, and purchase prices. Each customer has access to their individual XML file, which they can import into their store.
5. Integration with a selected **newsletter system** (system to be determined during implementation).
6. Integration with a selected **chat system** (system to be determined during implementation).

**25. Additional requirements not previously addressed:**

1. ……….
2. ……….
3. ……….