

Sheridan Marketing Inc.

B2C, B2B, and Website Operations Training Manual

Combined guide for Part 1, Part 2, and Part 3

PURPOSE

Train internal staff and client users on the refined store-based WooCommerce workflow, including B2C product setup, B2B settings, and website/admin operations.

Manual Structure

Part 1 - B2C System: Product adding and updating, categories, brands, images, homepage content basics, store/branch attribute setup, variations, and B2C storefront behavior.

Part 2 - B2B System: Review of the B2C workflow plus B2BKing group settings, B2B pricing, tier pricing, separate B2B stock, and B2B order management.

Part 3 - Website Updates and Settings: Website administration tasks such as homepage and slider updates, posts, pages, media handling, basic site settings, and routine QA.

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- Part 2 - B2B System
- Part 3 - Website Updates and Settings

Part 1 - B2C System

This section covers the refined B2C workflow for adding products, assigning the Store/Branch attribute, creating variations, and maintaining core storefront content.

1. Login and Admin Access

- Go to the WordPress login page and sign in with your assigned username and password.
- After login, the left sidebar is the main navigation area for products, media, posts, sliders, attributes, brands, categories, and store settings.
- Users who mainly manage products should focus on Products, Media, Brands, Categories, Attributes, and Variations.

2. Main Admin Menu Areas to Know

- Products - add, edit, and organize products.
- Media - upload product images and other website images.
- Posts - create blog or news content.
- Slider - update homepage hero slides.
- Brands and Categories - organize products for browsing and filtering.
- Attributes - manage the global Store/Branch attribute and its terms.

3. How to Add or Update a Product

- Go to Products and click Add New Product, or open an existing product to edit it.
- Complete the standard WooCommerce details first: product title, long description, short description, product image, gallery images, SKU, categories, brand, and default/main price.
- Add the global Store/Branch attribute and choose the branches where the product should be available.
- Create or update variations from the Store/Branch attribute.
- Set regular price, sale price if needed, and stock per store variation.
- Update the product and test it on the storefront by switching the store selector.

4. Standard Product Entry Terms

Term	Meaning
Product Title	The product name shown on the website.
Long Description	The main product description shown on the product page.
Short Description	A shorter summary used in selected layouts.
Product Image	The main image for the product.
Product Gallery	Additional images shown on the product page.
SKU	Internal product code or identifier.
Category	The main grouping used for browsing and filtering.
Brand	The product brand used for brand filtering.

Store/Branch Attribute	The global attribute used to assign the product to branches.
Variation	A store-specific version of the product, used for pricing and stock.
Variation Price	The price used for the selected store variation.
Variation Stock	The quantity available for the selected store variation.

5. Categories and Brands

- Use Categories to organize products by type, such as Adhesives, Electrical, Hardware, or Paints.
- Use Brands to group products by manufacturer or product line, such as Lux, Sher, Apollo, or Aegis.
- To add a new category or brand, go to the corresponding admin menu, enter the name and optional slug/parent details, then save.
- After creating the category or brand, assign it inside the product edit screen so the product appears in the correct filtered views.

6. Uploading Product Images

- Open Media to upload images in advance, or upload directly inside the product edit screen.
- Use Product Image for the main thumbnail and Product Gallery for supporting images.
- Use clear, properly cropped images with a plain background whenever possible.
- Keep the main product image consistent in size and orientation for a cleaner storefront.

7. Homepage, Hero Slider, and Posts

- Open Slider from the admin menu to edit existing slides or add a new one.
- Each slide usually contains an image, title, short description, button label, and destination URL.
- Use the slider for hero promotions, seasonal campaigns, or featured brand/category links.
- Open Posts to create or edit blog articles, assign categories, and add featured images before publishing.

8. Store/Branch Attribute Setup

- Mandaue is the default or main store.
- Other branches are assigned through the global Store/Branch attribute.
- Each selected branch term can be used to create a corresponding variation.
- When the user switches stores, the site should follow the matching branch/store variation.

9. What the B2C Setup Does on the Storefront

- The customer chooses one store at a time using the store selector.
- Products assigned to that branch appear in the filtered listing.
- The selected store is remembered across listing pages and product pages.
- Single product pages use the matching store variation for pricing and stock behavior.
- If the selected store variation is out of stock, the customer sees an out-of-stock state for that store.

10. Quick B2C Troubleshooting

- If a product does not appear, check whether the correct Store/Branch terms were assigned.
- If the price is wrong, check the selected variation price for the chosen store.

- If add to cart is disabled, check the variation stock and whether the correct store variation exists.
- If the wrong store appears in the header, recheck the store selector and saved store cookie.
- If a category, brand, or image is missing on the storefront, confirm it was assigned correctly inside the product.

Part 2 - B2B System

This section builds on the B2C workflow and focuses on B2BKing group settings, B2B pricing, separate B2B stock, and order management.

1. Review of B2C Product Adding and Updating

- Start with the same base product setup used in Part 1.
- Confirm the correct Store/Branch attribute terms are selected.
- Confirm the required store variations already exist before applying B2B-specific settings.

2. B2BKing Overview

- B2BKing controls B2B user groups, pricing behavior, visibility rules, and some checkout/payment behavior.
- B2B and B2C can behave differently on the same product depending on the logged-in user group.

3. B2B User Groups

- Understand which customer group the user belongs to before testing.
- Assign customers to the correct group in B2BKing so pricing and permissions apply properly.
- Keep group naming clear and consistent for easier maintenance.

4. Basic B2B Settings

- Review general B2BKing visibility and access settings.
- Confirm whether guests and B2C users should see the same products as B2B users.
- Review any payment or checkout restrictions that apply by group.

5. B2B Product Setup

- Use the same product and store variations where possible.
- Apply B2B pricing and stock settings on the relevant store variation.
- Confirm the variation is enabled and purchasable for the intended B2B group.

6. B2B Pricing

- Set group-based B2B pricing where required.
- Use variation-level pricing when branch/store differences matter.
- Confirm whether pricing is fixed, discounted, or controlled by dynamic rules.

7. Tier Pricing

- Set quantity breaks carefully and verify the thresholds.
- Test tier pricing on the correct variation, not just on the parent product.
- Document which products use tier pricing and which do not.

8. Separate B2B Stock

- Enable separate B2B stock when the B2B quantity should differ from B2C.
- Check stock at the variation level, especially when Store/Branch is used as the variation attribute.
- If B2B stock is zero, the product may appear selected but still be unavailable to the B2B user.

9. B2B Frontend Behavior

- Test products as an actual B2B account, not only as admin.
- Confirm the correct store variation is selected and that the correct B2B price is shown.
- Confirm the add-to-cart button is active only when the B2B variation has stock and valid pricing.

10. Order Management

- Open WooCommerce Orders to review customer details, selected products, and order status.
- Check whether the selected store/branch is visible in the order details and emails.
- Use order notes and status changes as part of the normal processing workflow.

11. Basic B2B Troubleshooting

- If the product is visible but cannot be purchased, check the B2B stock and B2B pricing on the variation.
- If tier pricing is not applying, confirm the user group and quantity break rules.
- If the wrong price appears, verify whether the issue is variation pricing, group pricing, or both.

Part 3 - Website Updates and Settings

This section covers day-to-day website maintenance tasks that support the storefront beyond product entry and B2B setup.

1. Login and Access Review

- Use the correct admin account for website content updates.
- Know which areas are safe for regular content edits and which settings should be changed carefully.

2. Homepage Updates

- Edit homepage text, banners, featured links, and call-to-action buttons carefully.
- Review desktop and mobile output after changes.

3. Hero Slider Management

- Update slide images, titles, descriptions, button text, and links.
- Check that each slide still points to the correct page or product group.

4. Posts and News Updates

- Create and edit blog posts with title, content, category, and featured image.
- Preview posts before publishing to check formatting and images.

5. Pages and Basic Content Updates

- Edit existing pages for copy, banners, and section images as needed.
- Keep section spacing and image sizes consistent with the rest of the site.

6. Media Library Management

- Upload new images to the Media Library and replace outdated images carefully.
- Use clean filenames and optimized images where possible.

7. Categories, Brands, and Navigation Cleanup

- Review whether product categories and brands are still organized logically.
- Check menu links and featured links if product groupings have changed.

8. Store Selector and Branch Display Review

- Confirm the selected store label matches the store selector.
- Check that the store selector stays in sync across homepage, shop, and product pages.

9. Basic Settings Review

- Review payment method visibility, shipping display, and key WooCommerce settings only when necessary.
- Save permalink settings when taxonomy or attribute archives are not reflecting correctly.

10. QA Checklist

- Check homepage content and slider updates.

- Check a sample product listing and product page.
- Check store selector sync, category links, and basic mobile display.

Notes

Use this combined guide as the main training reference. As the workflow continues to mature, Parts 1 to 3 can be split into separate manuals again if the team needs deeper role-based training.