ADMINISTRATION CONSOLE GUIDE

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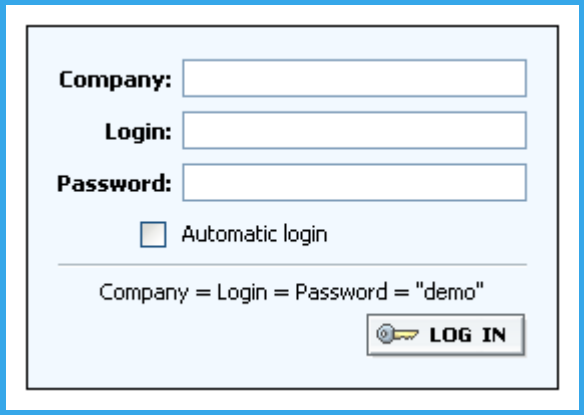
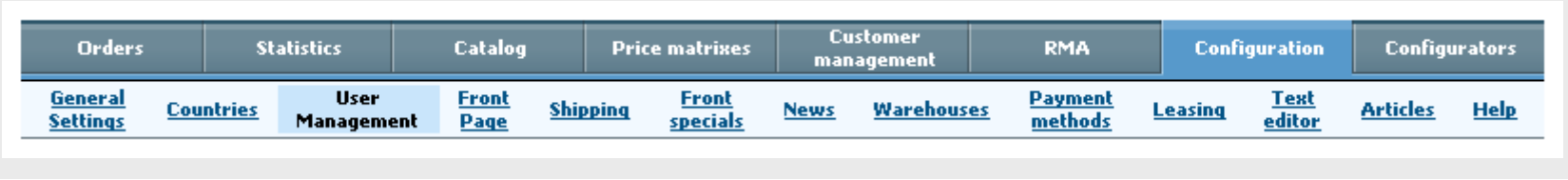
THE ADMIN

How to access the admin
Automatic login
How to manage admin users and groups

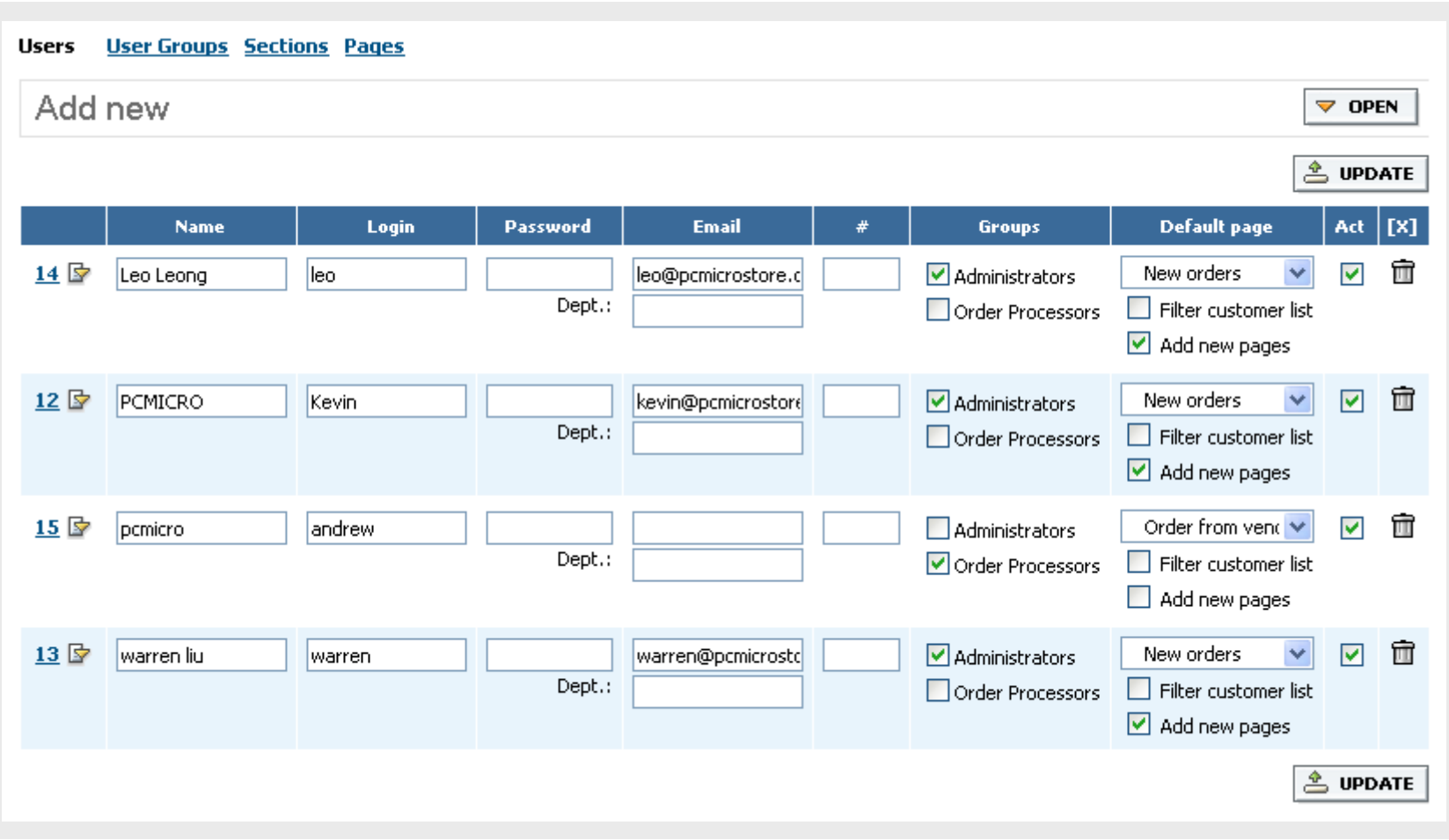
The website administration backend is accessed at http://admin.webmercs.com . It will switch to https (secure / encrypted) when you log in. Login information consists of company name, username and password. If you want to avoid writing all the information every time, you can check the box for Automatic Login. This will place a cookie on your computer and automatically log you in when you access the login page.



Once you are logged in, the menu looks like this:

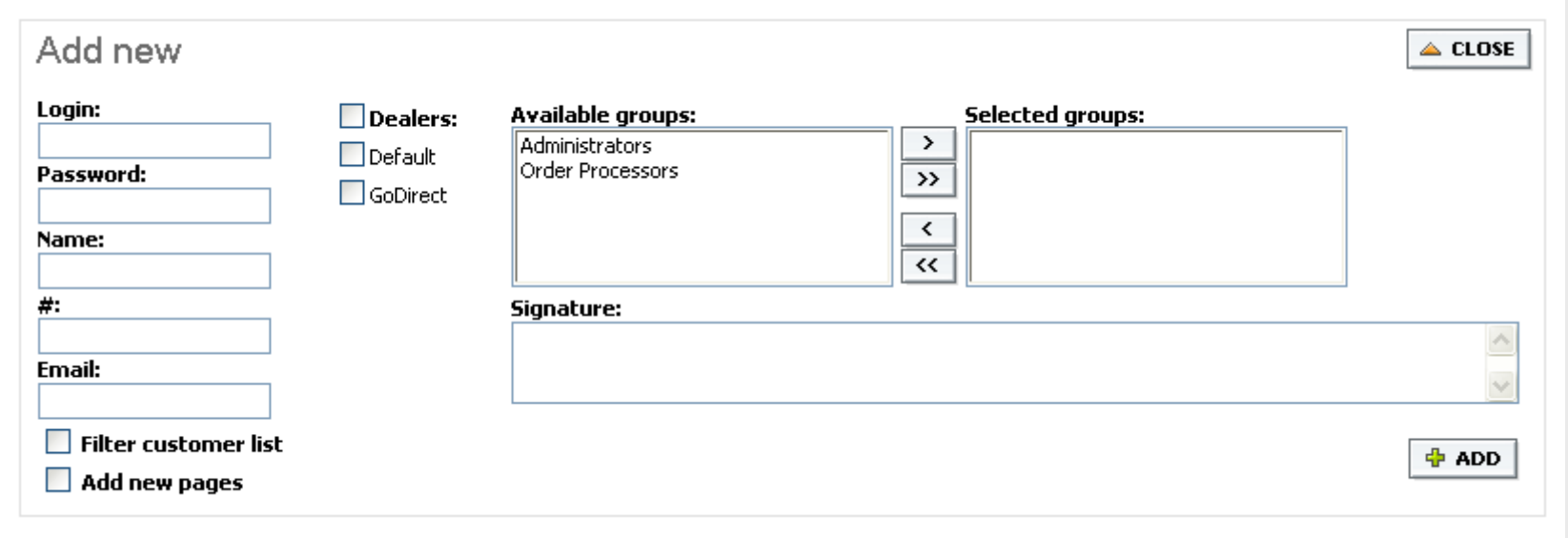


The dealer will be given one initial username and password. Additional users are created by accessing Configuration/User Management in the main menu. See previous image for the main menu



How to create a new admin user:

Click on OPEN to show the Add new box. Here you enter login (username), Password, Name, email address, # (your internal userID, if you use this in for instance an accounting system). Filter customer list option means that this user can only see his own customers and orders. Add new pages option means that this user will automatically get access to new menu items that we might add. You can select an admin access group for the new user.

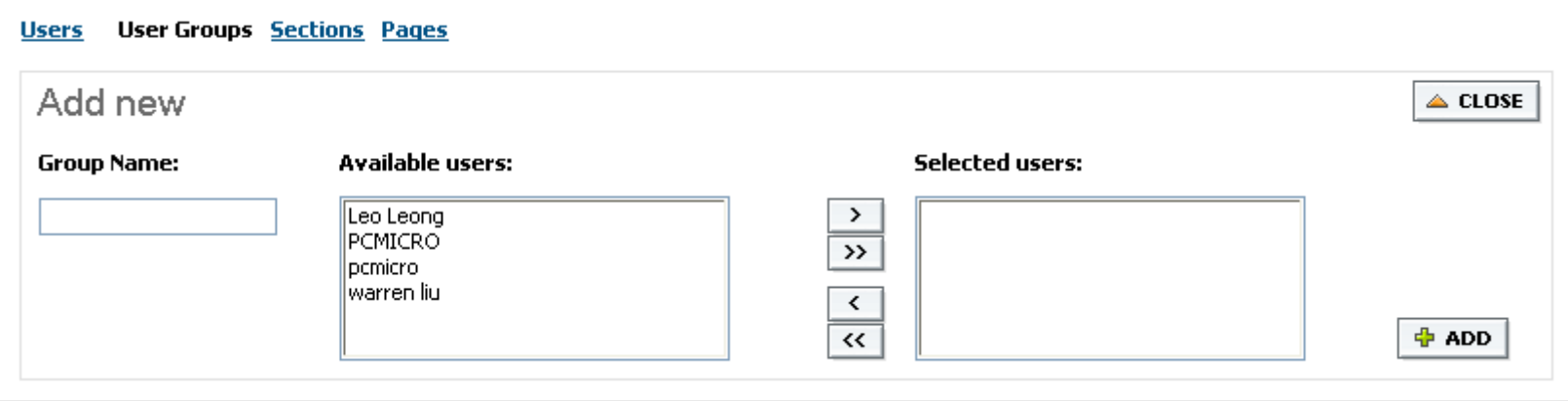


Admin users can belong to different admin groups. Each admin group can have access rights to different menu items. By default, an administrator group with access to everything is created.

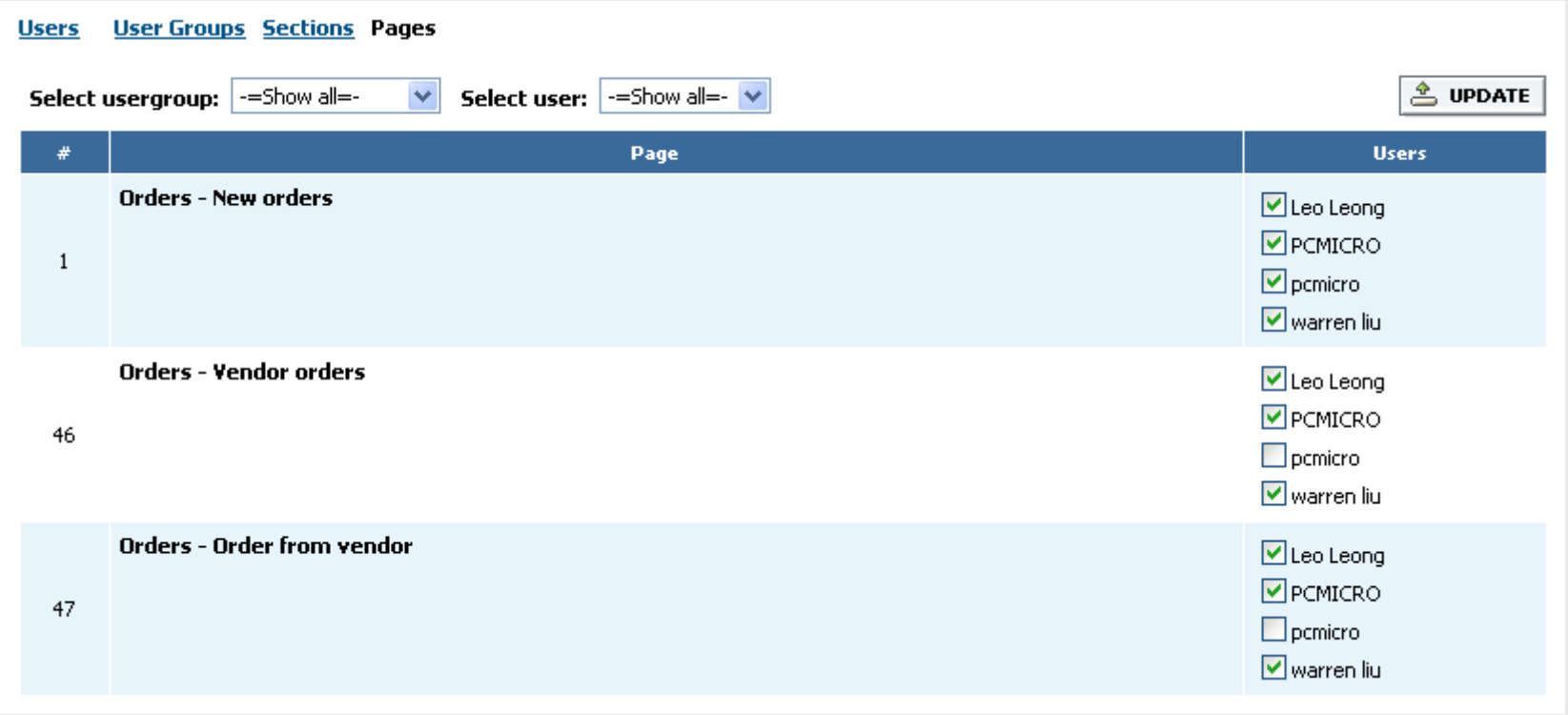
The option for multiple dealers means that you can control several separate frontends from one administration console, and give different users the right to control one or more frontends.

How to create a new admin group:

Inside Configuration/User Management, click on User groups. Here you see a list of the existing groups, and you can modify the settings of, or delete a group. Expand the Add new box by clicking on the OPEN button. You enter a Group Name and optionally select users from the list and click the ADD button. The new group will be added to the list. You can set which users belong to a group, which main menu sections they should have access to, and what the default menu item should be.



In some cases you may want to limit access to a certain submenu item within a section, for instance allowing a user access to Configuration/Front Specials, but not to Configuration/User Management. This is done in the section Pages, under Configuration/User Management. When you have modified the access list, click on UPDATE.



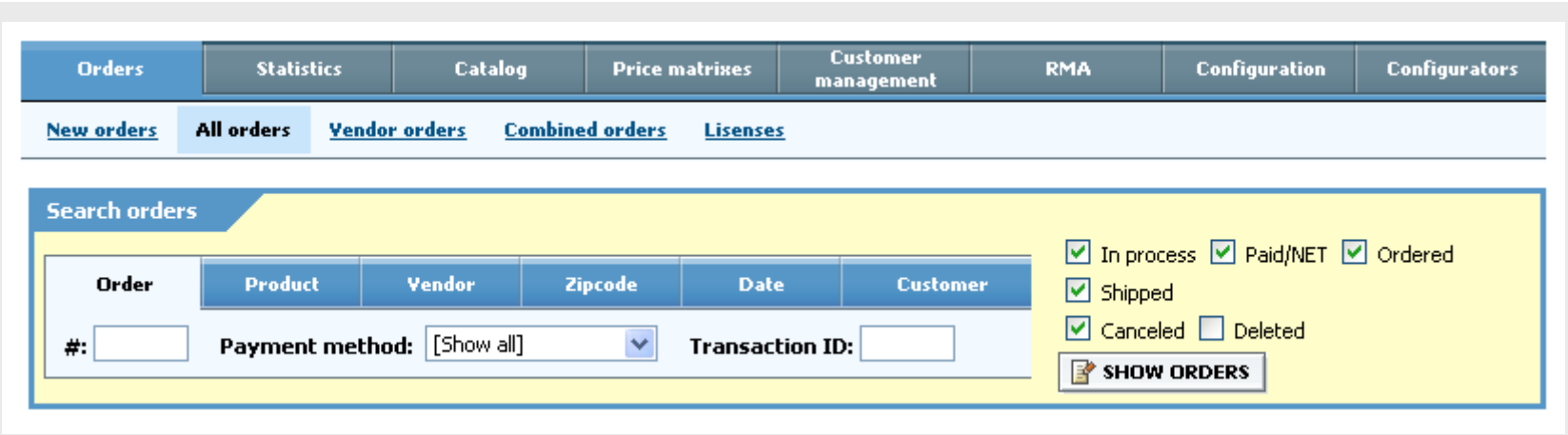
Optional features:

- One admin can be expanded to control several frontends.
- The signature for an admin user can be added to emails or used as a greeting when a customer that belongs to this user logs on, etc.

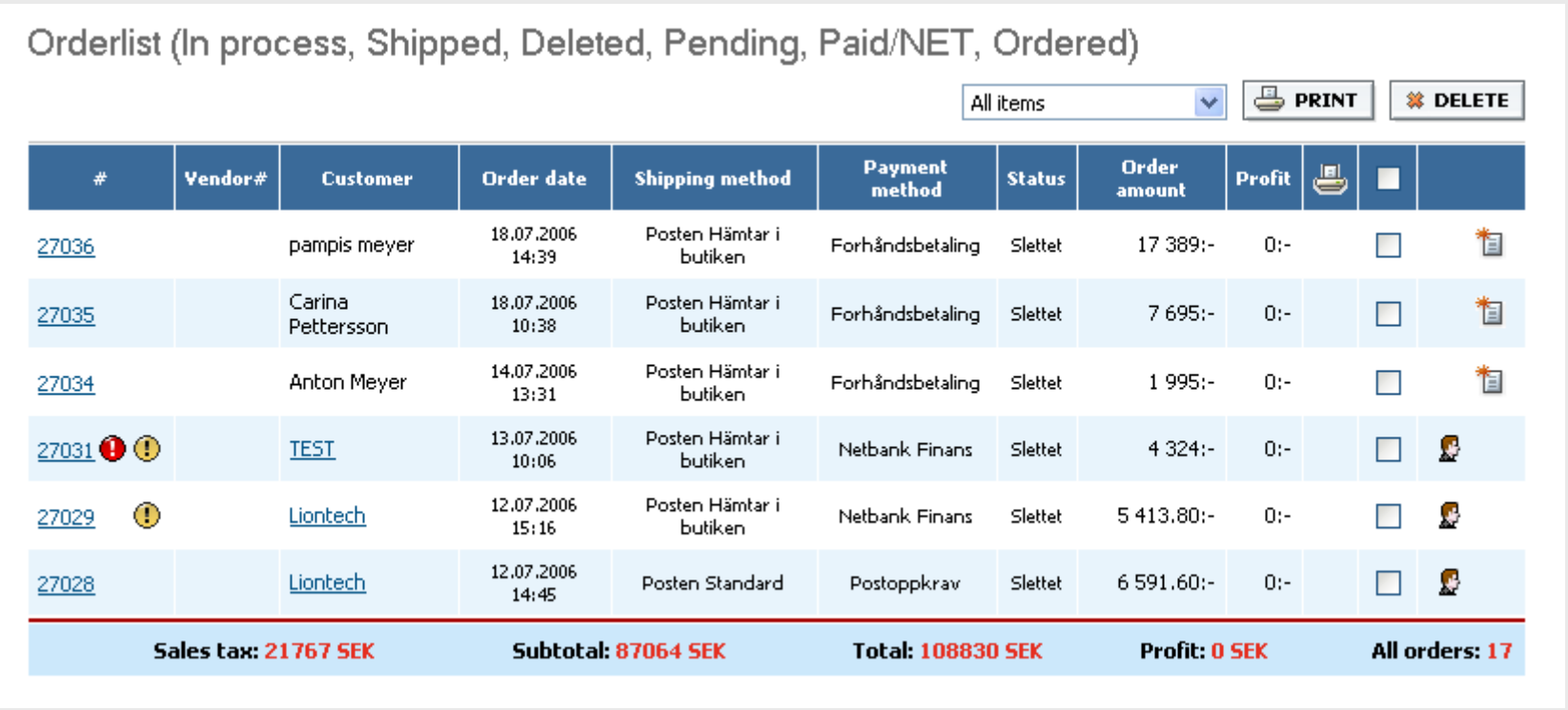
ORDER PROCESSING

Listing all the orders
Accessing orders details
Finalizing orders and placing them with distributors

The menu item Orders/All orders is the first step for processing orders. You can use the filter above the list to select by order details or status. Orders/New orders show orders with status In process and Paid/Net, while Orders/All orders show all except with status deleted. The Paid/NET order status means that the order has been paid, or the customer has credit (net terms).



ORDER PROCESSING



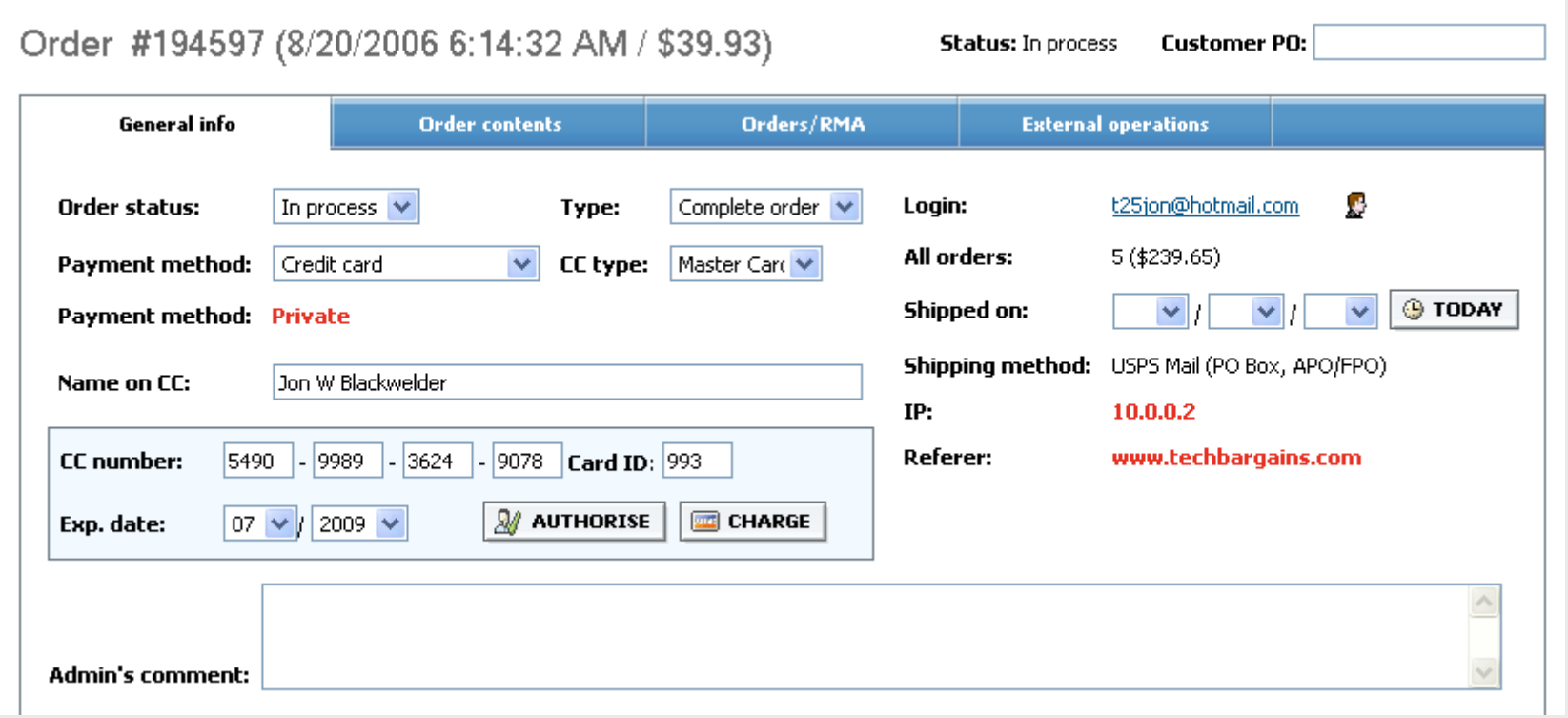
Order detail is accessed by clicking on the order number.

Each order line shows basic info about the order. You can print or delete multiple orders by selecting the checkbox and clicking the respective buttons. An icon will show if the order has been printed. Clicking on the head-icon opens a new window where you are logged in on the website frontend as the customer that placed the order. You need to allow popups from our admin for this function to work. If the customer name is a link, you can click on it to get to the customer detail pages. The presence of admin or customer comments for an order will be indicated by yellow and red exclamation marks on each order line.

There are four sections (tabs) in the order detail:

General info.

Contains typical order header information. Before the order is processed you can change the information. You can enter admin comments (not visible for the customer) at any time.



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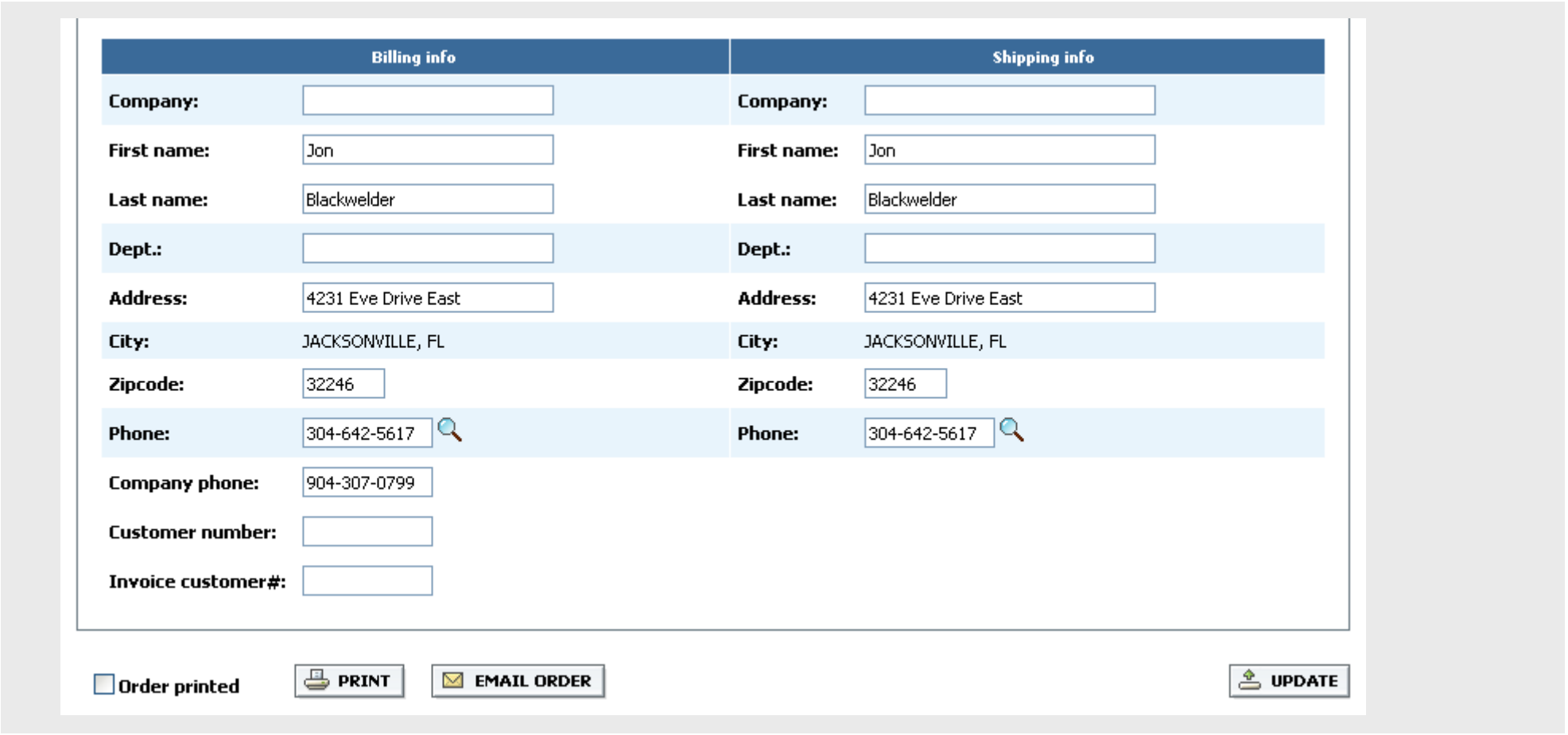
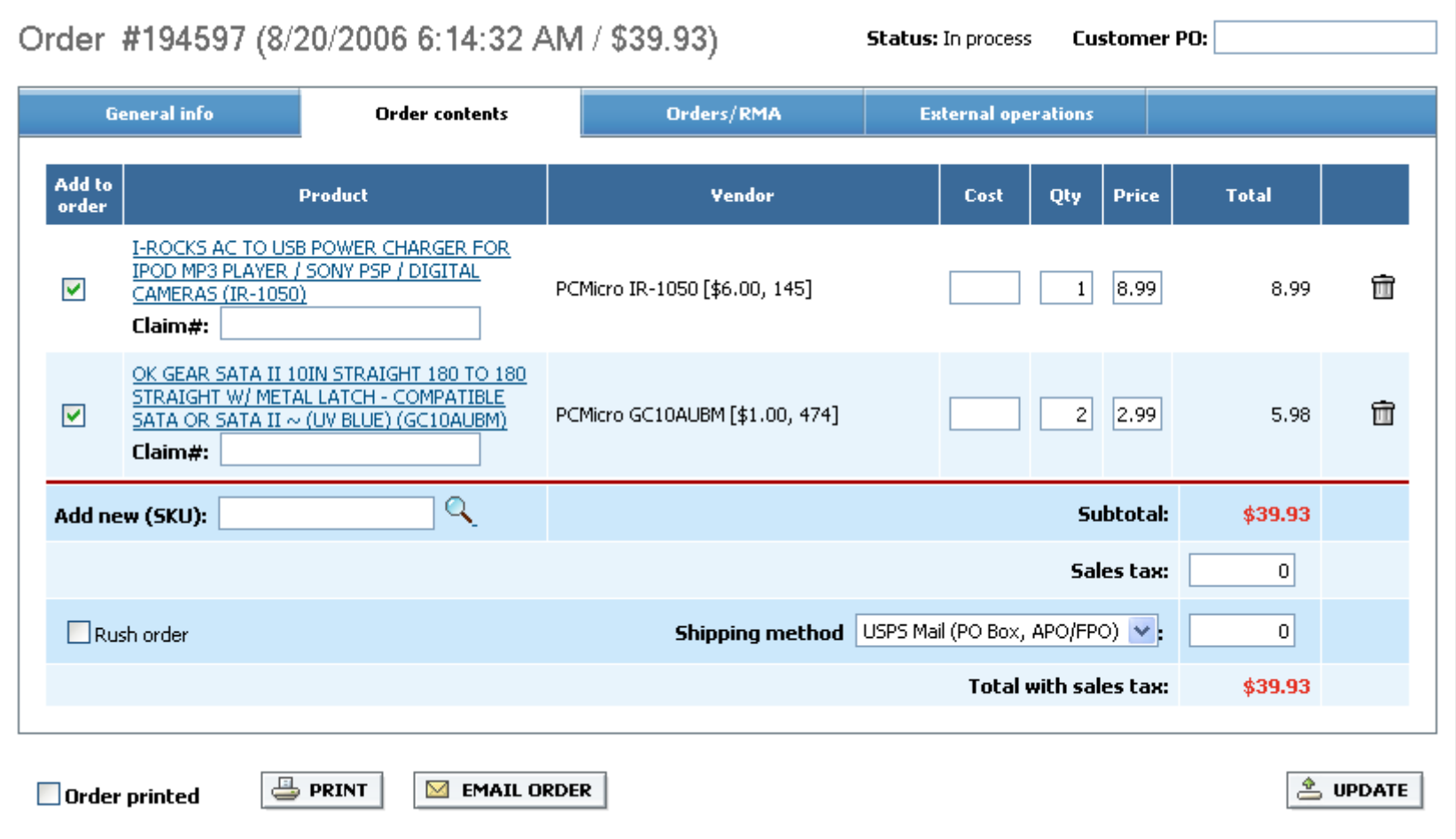

Billing info
Company:
First name: Jon
Last name: Blackwelder
Dept.:
Address: 4231 Eve Drive East
City: JACKSONVILLE, FL
Zipcode: 32246
Phone: 304-642-5617
Company phone: 904-307-0799
Customer number:
Invoice customer#:
Shipping info
Company:
First name: Jon
Last name: Blackwelder
Dept.:
Address: 4231 Eve Drive East
City: JACKSONVILLE, FL
Zipcode: 32246
Phone: 304-642-5617
Order printed
PRINT
EMAIL ORDER
UPDATE

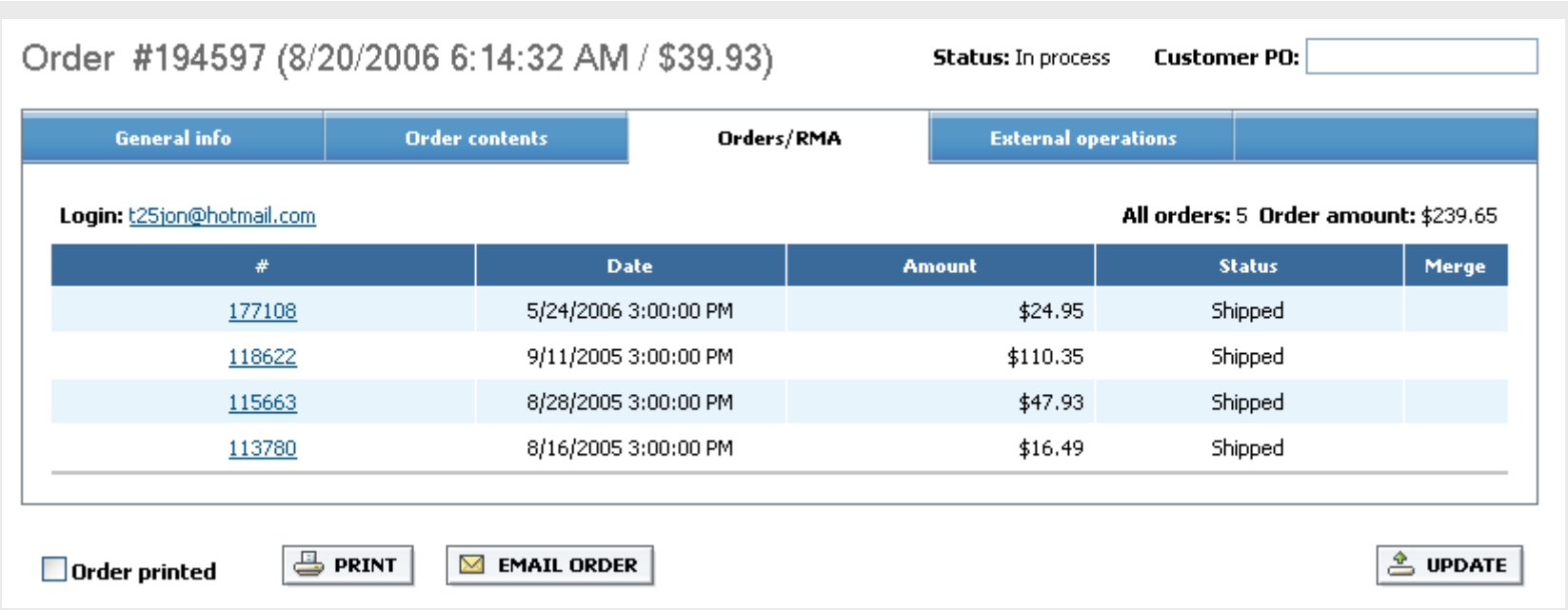
Order contents.

You may modify each order line, add or remove products, and select which vendor to order from. Customer comments are shown in this section. The claim# field is for indicating why the cost price was changed (typically contains bid/opg number). Not all vendors support this feature. Adding a new product can be done by filling out the Add new (SKU) field and clicking on the icon behind the field. If there are multiple possible products, a list of products will be shown. Email Order button will send a new order confirmation to the customer.

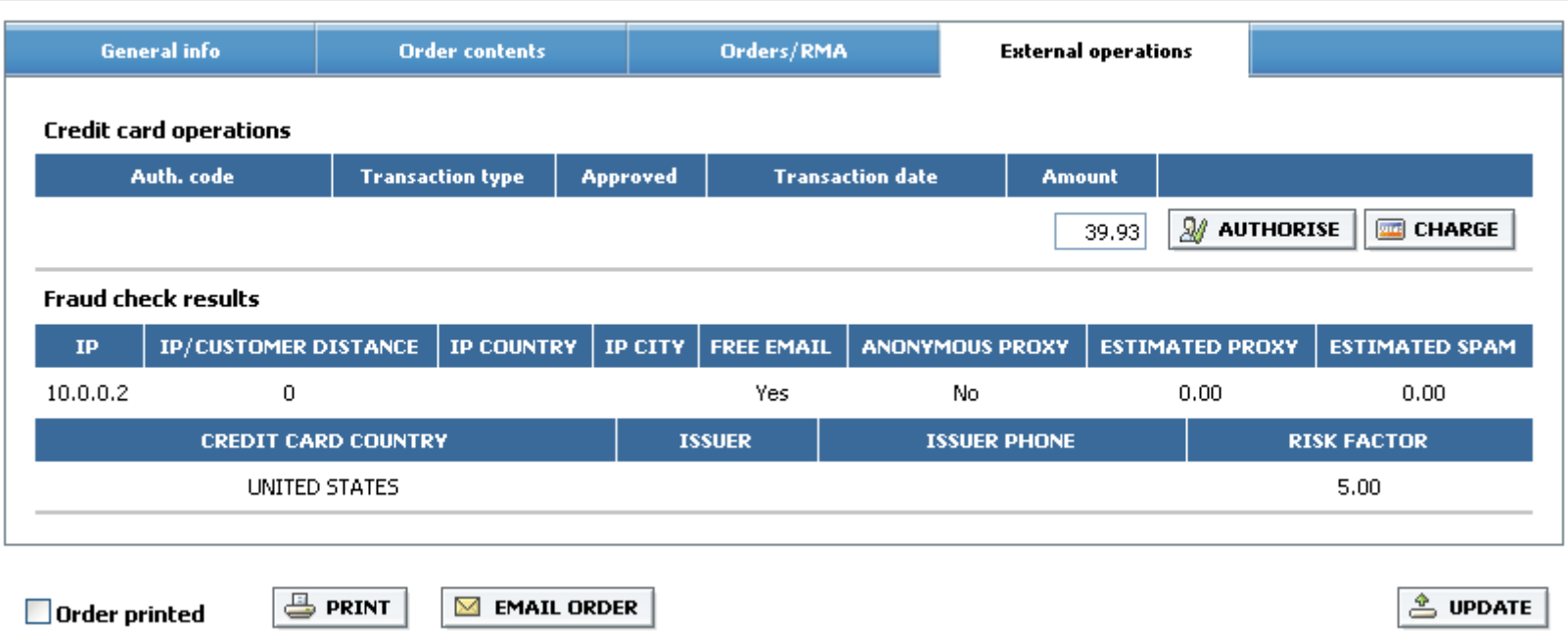


Orders/RMA.

This tab shows a list of other orders and merchandise return for this customer.



When the order is the way you want it, you can click on the ORDER button in the bottom right corner to place the order with the vendors selected for each of the order lines.



External operations.

Contains a list of all credit card operations, purchase orders with vendors, fraud check results, and more, depending on activated features.

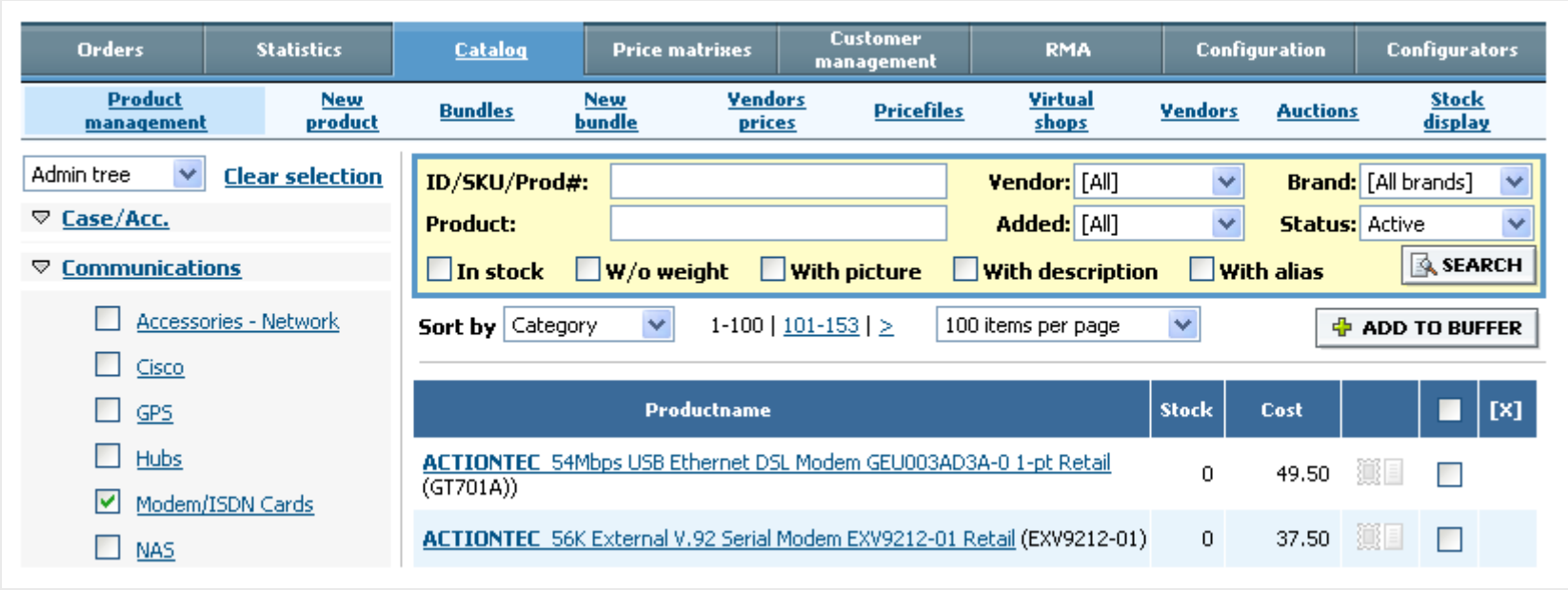
Optional features:

- Multiple order credit card processing and shipping label printing (for those that ship orders from their own warehouse)
- Advanced fraud protection for credit cards (IP Location and proxy detection)
- Automatical credit card processing, leasing and other payment/finance methods
- Shipping label creation for different carriers
- Automatic transfer of sales and purchase order information to accounting system
- Customers may have hierarchy of order approval within their organizations
- Orders may be placed electronically from purchasing/procurement portals in addition to the regular website.
- Automatic bid/opg pricing

PRODUCT MANAGEMENT

Searching for products, adding to buffer
Adding your own information
Creating your own products
Creating product bundles

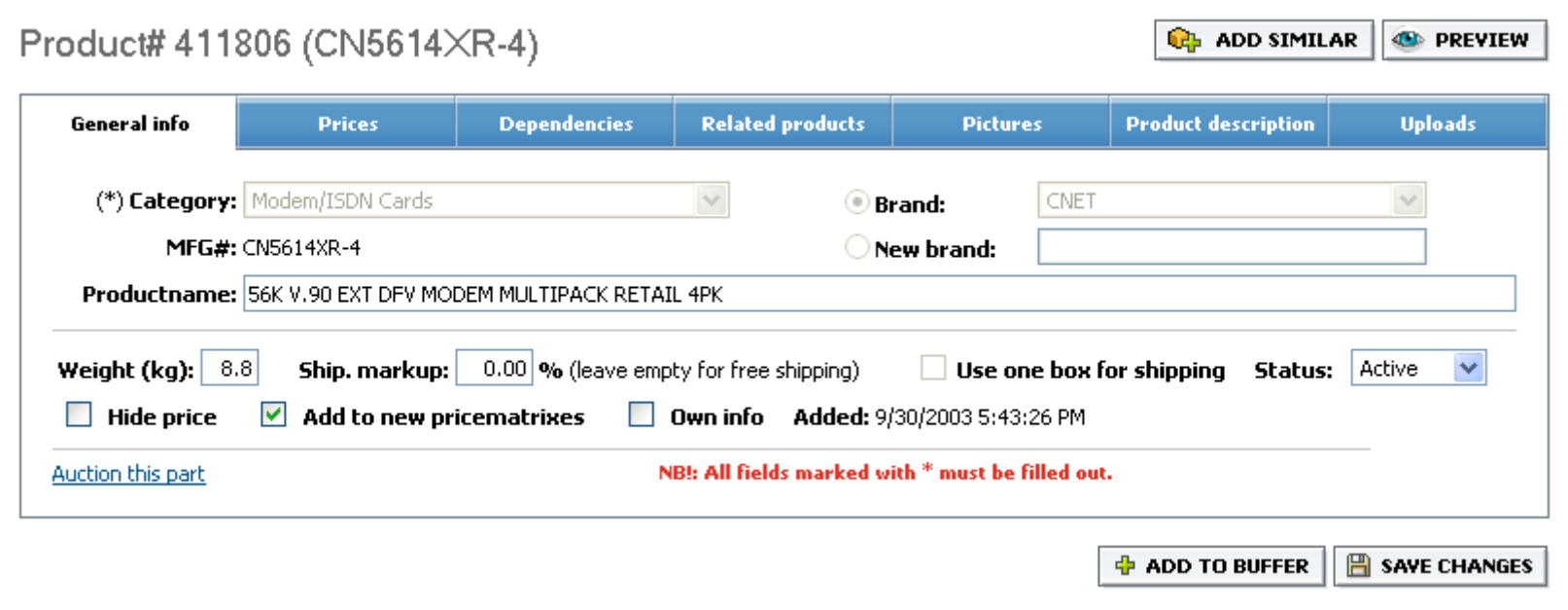
You search for particular products by selecting Catalog/Product management in the main menu. On the left hand side you can select which category tree you want to use. Clicking on a subcategory link in the tree will instantly bring up a list of products in that category. Instead of clicking on one category you may select several (checkbox), and fill in the fields and checkboxes/dropdowns in the filter. The ID field only searches the website, vendor or manufacturer part number, while the Product field searches all ID fields as well as the brand and product name strings. If you want to add a product to the buffer, you mark the checkbox on the product line and click the ADD TO BUFFER button.



Product details is accessed by clicking on the product name. There are several sections/tabs in product details, and the important ones are:

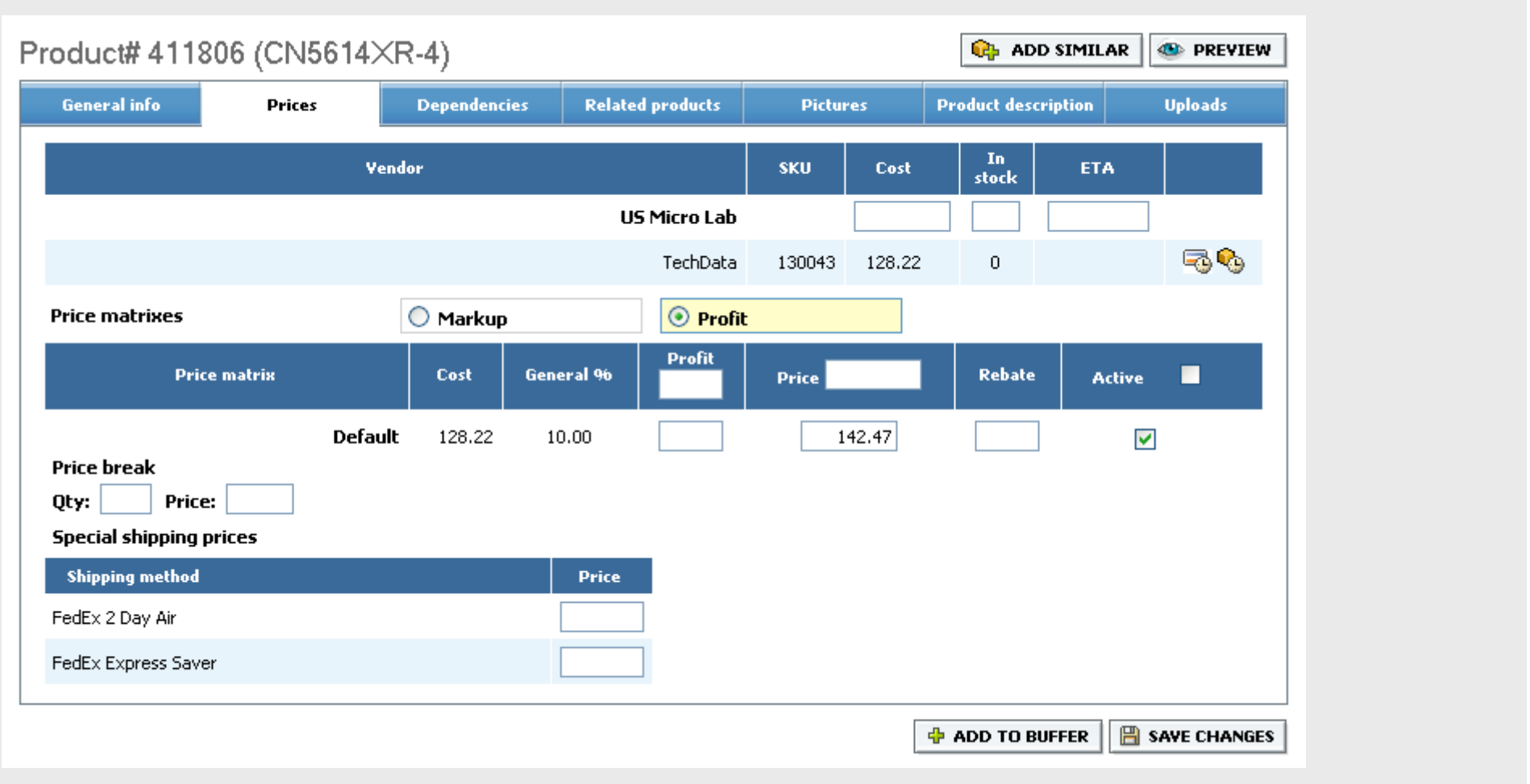
General info.

Basic product info and a few important features. Hide price option lets you hide the price for a product in the website frontend. If you don't want to show a product at all you can set status to Deleted instead of Active. If a product is specific to one customer or pricegroup, you can unselect the checkbox called Add to new pricematrices. If you are unhappy with the product information that we provide (this includes product name, description and image), mark the Own info checkbox and save changes. When the page refreshes you will have access to upload your own images on the Pictures tab and HTML-edit the description on the Product description tab. The product name can be changed on the General info tab.

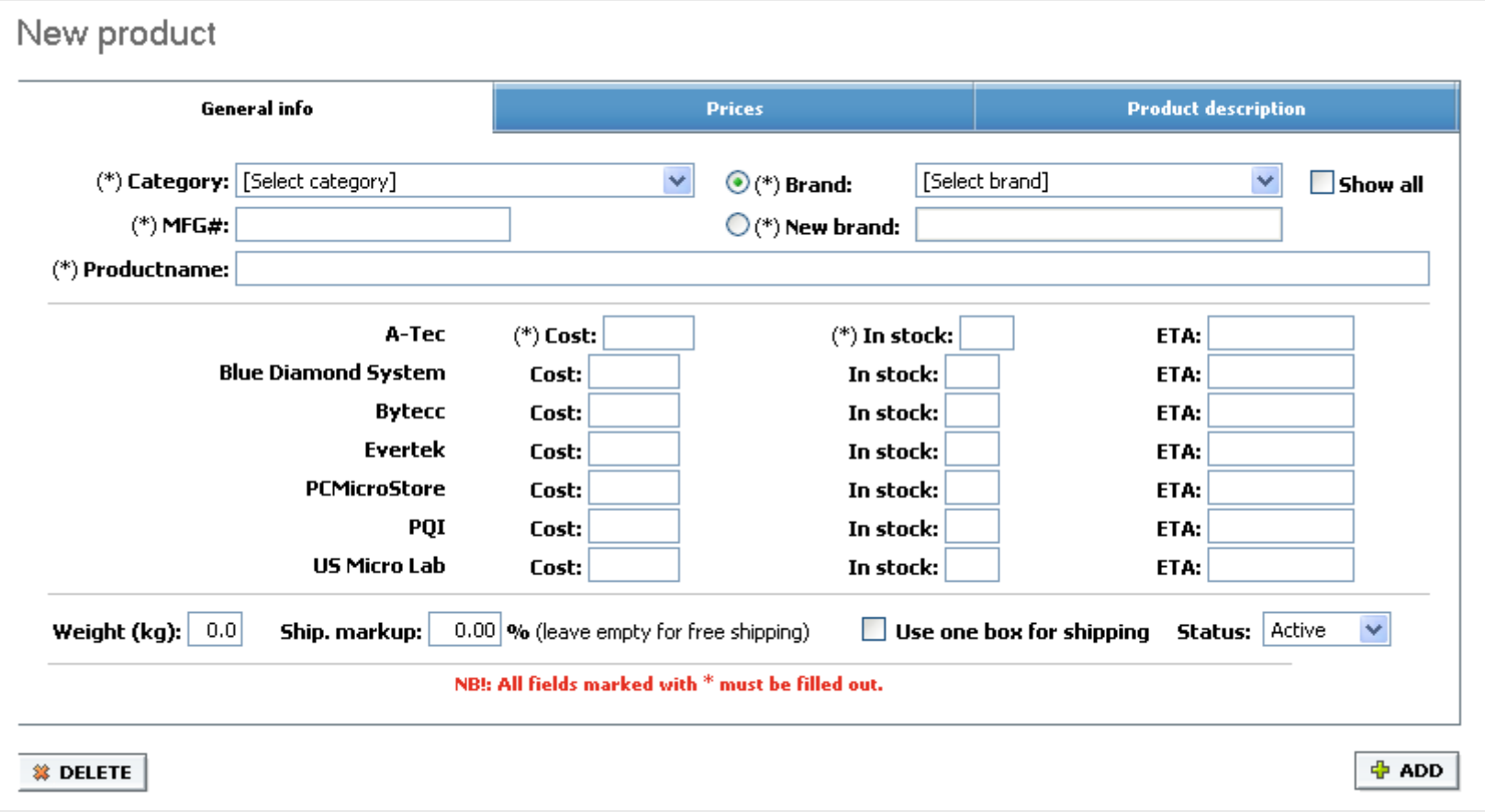


Prices.

A list of all the vendors, their part numbers, prices and stock, and all the price matrices (pricegroups). If you want to set a specific markup for a product you can do so, and if you want to remove a product from a price matrix you can uncheck the active checkbox. You can set price and stock for local warehouse or vendors that are not automatically updated.

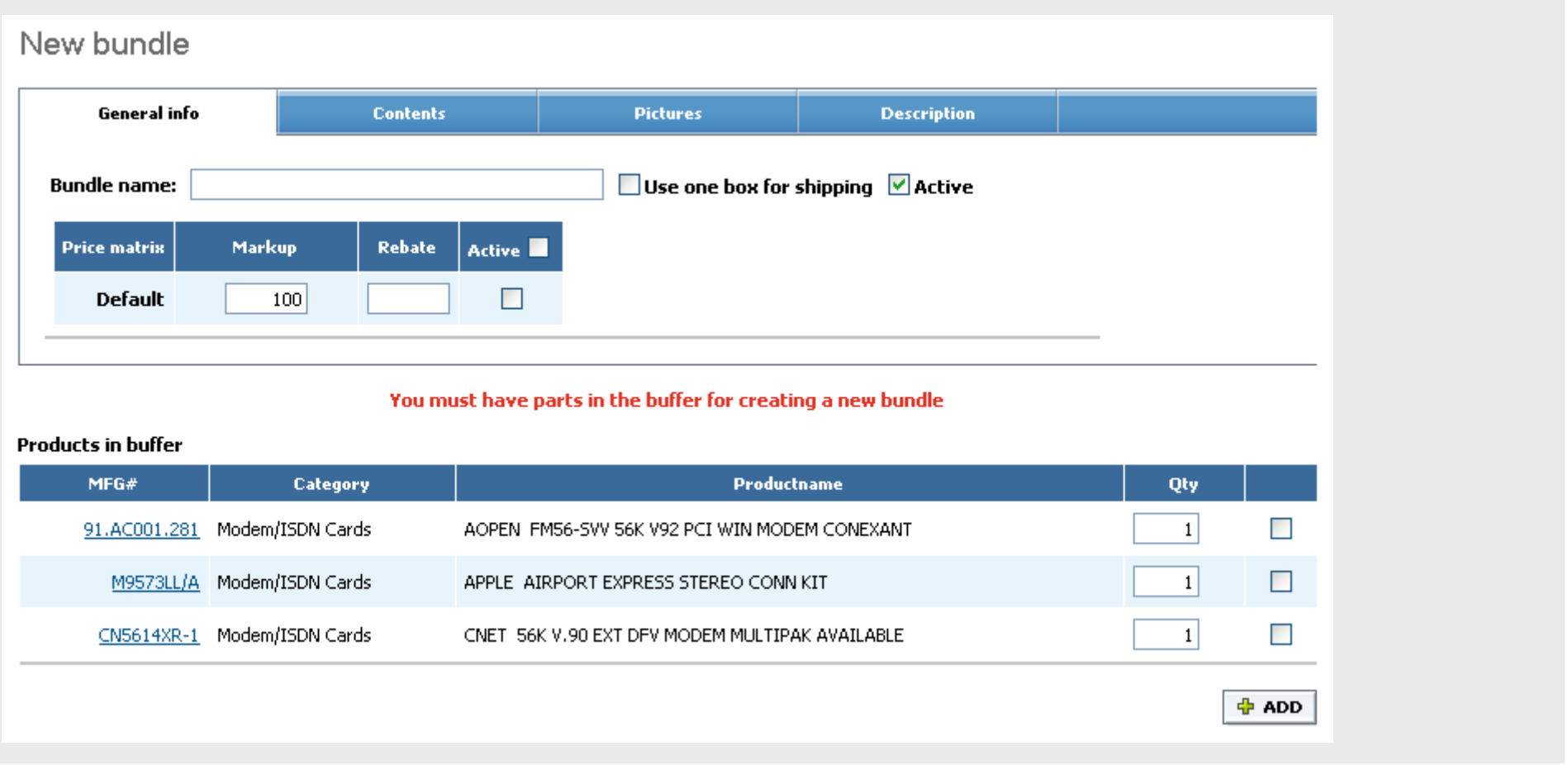


Catalog/New product gives you an empty product detail page. To create your own product you first select the category and wait for screen refresh, before you enter brand and other details. You can create a new brand inside product detail, if necessary. When all the information is entered you click the ADD button. After you add the new product you will see more options (tabs).

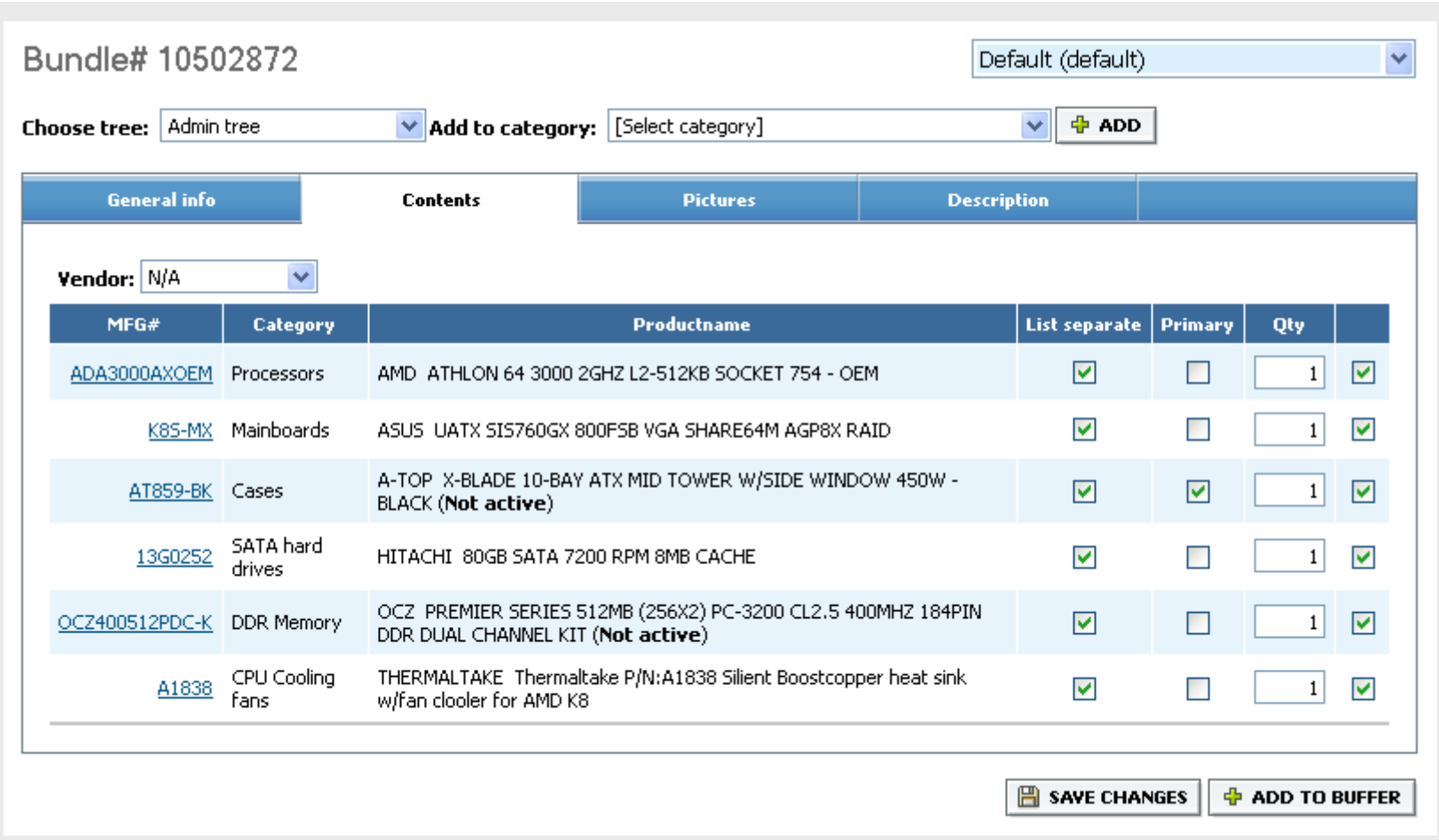


Creating a bundle.

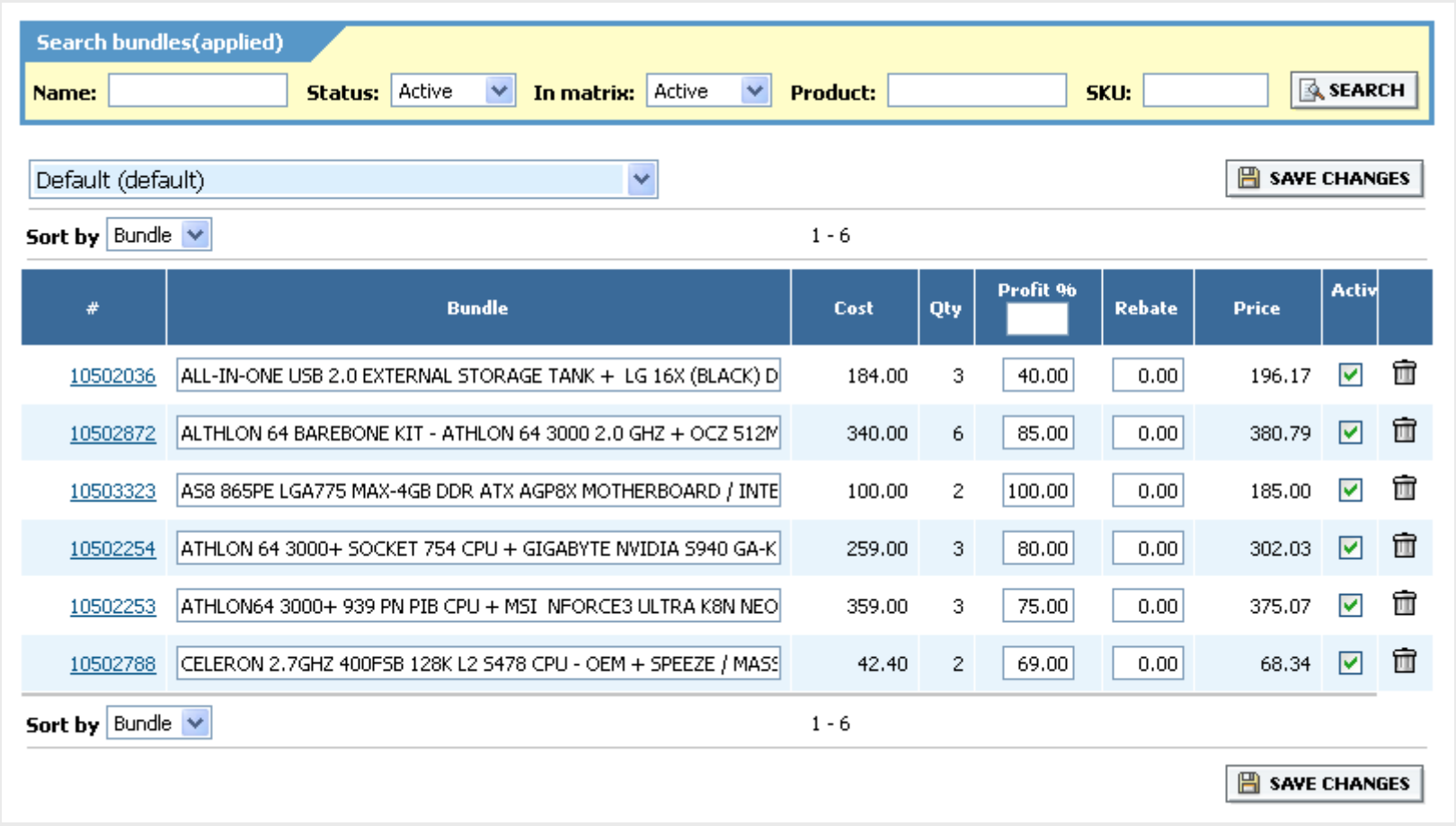
After you have added products to the buffer you can create a bundle by selecting Catalog/New bundle. You give the bundle a name and select products from the list (the buffer products are shown automatically) and click the ADD button.



After adding products to a bundle you can specify if they should be listed separately on the website. If not, the products will only be available in the bundle, and the customer will not see the individual price for the product or be able to purchase it alone. The Primary checkbox indicates which product is the main product. For instance, for a bundle with a notebook, a docking station and extra memory, the notebook will normally be the primary product, and we will automatically show image and information for this product when we show the contents of the bundle. You can also upload your own image and descripotion on separate tabs inside the new bundle interface. A markup of 100% indicates that the customer price for the bundle gives the same profit as if the products were sold separately. 0% would mean the bundle is sold at cost. The active checkbox next to the pricematrix indicates whether the bundle will be shown for a customer with a given price matrix. At the top of the page you can select which category you want the bundle to appear in.



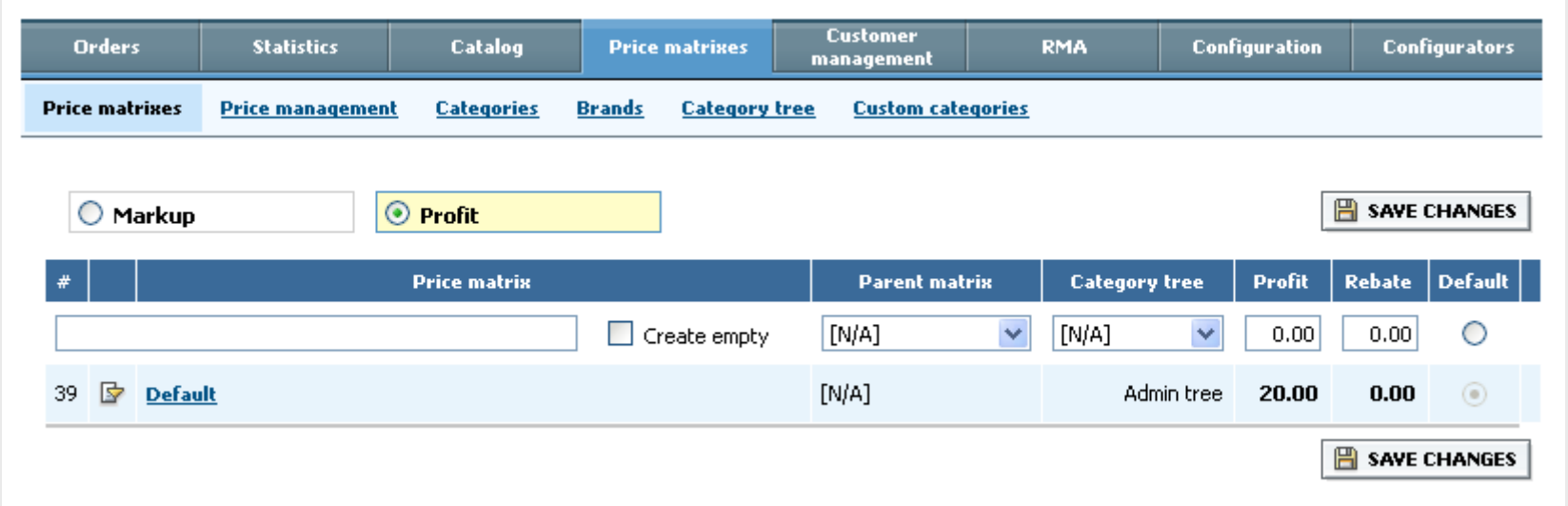
Catalog/Bundles shows a list of all the bundles. Use the filter to select bundles for a specific price matrix. You can set some basic info, delete the bundle, and also access the bundle details by clicking on the ID-link.



PRICING

Create and maintain price matrices
Freight charges
Vendor ranking
Specials brands for categories
Special product promotions for categories

The Price matrices/Price matrices menu item shows all the current price matrices (price groups) and this is where you create new price matrices. A price matrix is both for setting prices and for choosing active products. In other words, a price matrix is also a product matrix.



The price matrix listing has 9 columns: Price matrix ID, icon (click it for showing all the customers using a specific matrix), matrix name/description, parent matrix (more on that below), category tree (the category tree that this matrix refers to for inheritance), markup/profit (showing the overall markup), rebate (rebates are seldom used, you can probably disregard this field), default (indicates if a particular matrix is the default matrix or not), trashcan (for deleting a matrix, if there are customers attached to a matrix you delete they will be transferred to the default matrix). The price matrix section is extremely important – this is how all prices are set for all customers. Setting the correct category tree for a matrix is necessary because we need to know which folder(s) a specific product belongs to in order to inherit pricing that is set higher up in the hierarchy.

Let's start from the beginning:

Creating a new price matrix

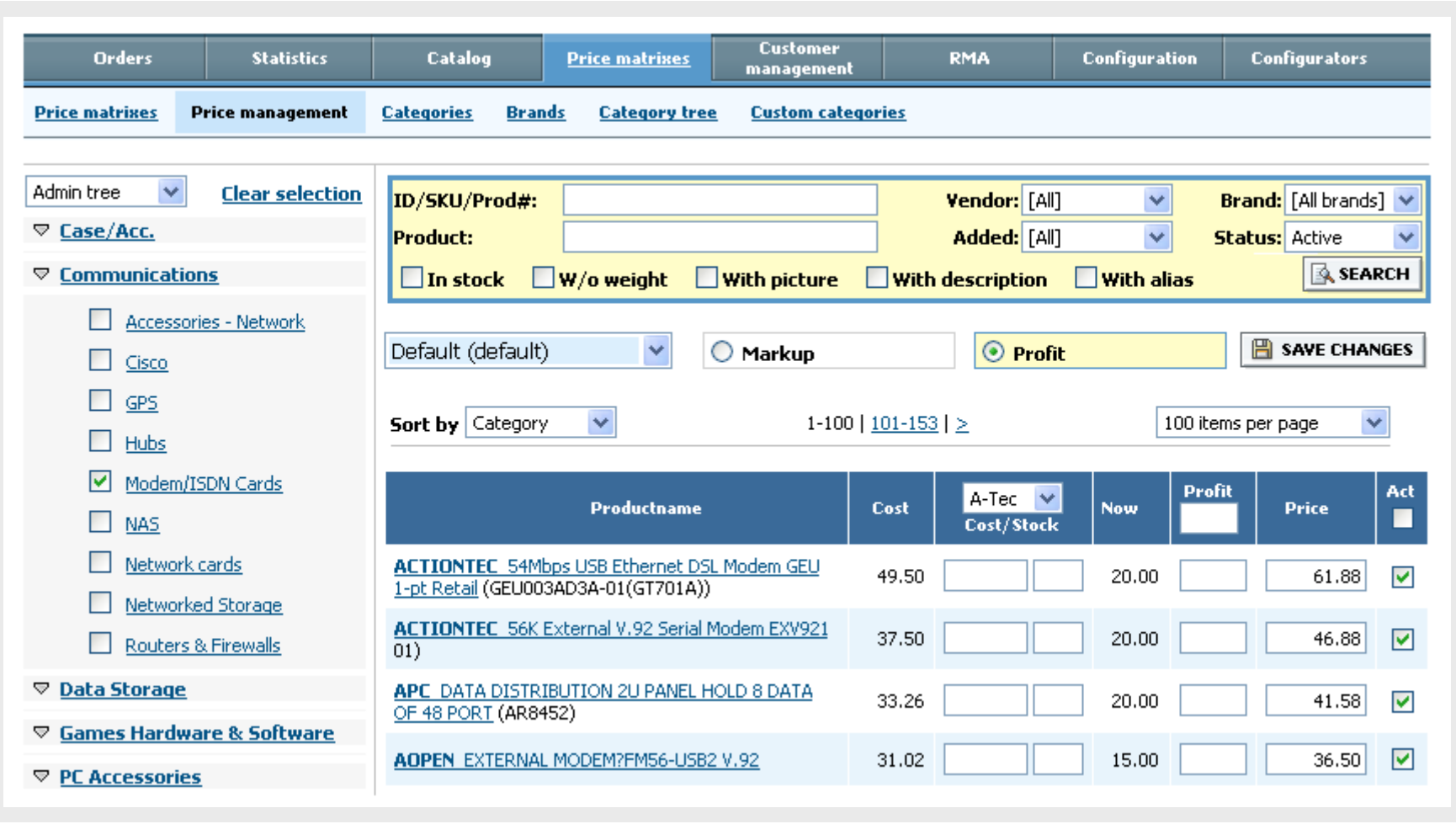
At the top of the list there is a price matrix name field. Fill it out with a logical name for your matrix (this can be something like "local government pricing" or "Some Company Inc."). Then you have an option to create empty matrix – this is seldom used, but convenient in some cases. Checking it will create a price matrix where all parts are inactive. If a company has an approved product list you would go to the <Prices> section to indicate which parts should be active. Then you have a dropdown list called parent matrix. A parent matrix is regular matrix. When a matrix is used as a parent matrix the product settings (active / not active) override the settings in the matrix, while the price settings in a parent matrix are only used if there are no price settings for a particular product in the matrix. A parent matrix is often used to set which products / brands are active for the whole firm, so that you don't have to think about this when you create price matrices (as long as you indicate the parent matrix). The markup/profit field indicates an overall markup for the matrix, and the rebate field an overall rebate. You can also set that the new matrix will be the default matrix. The default matrix is the matrix used when the customer does not belong to another specific matrix (such as if the customer is not logged in).

Building the price matrix

We give you full freedom for creating a price matrix the way you want. The main principle behind the price matrix is that prices set on a more detailed level override those on a less detailed level. For instance, setting 10% markup on a specific product will override the setting of for instance 8% for the category this product belongs to. Here is the order in which the prices are set:

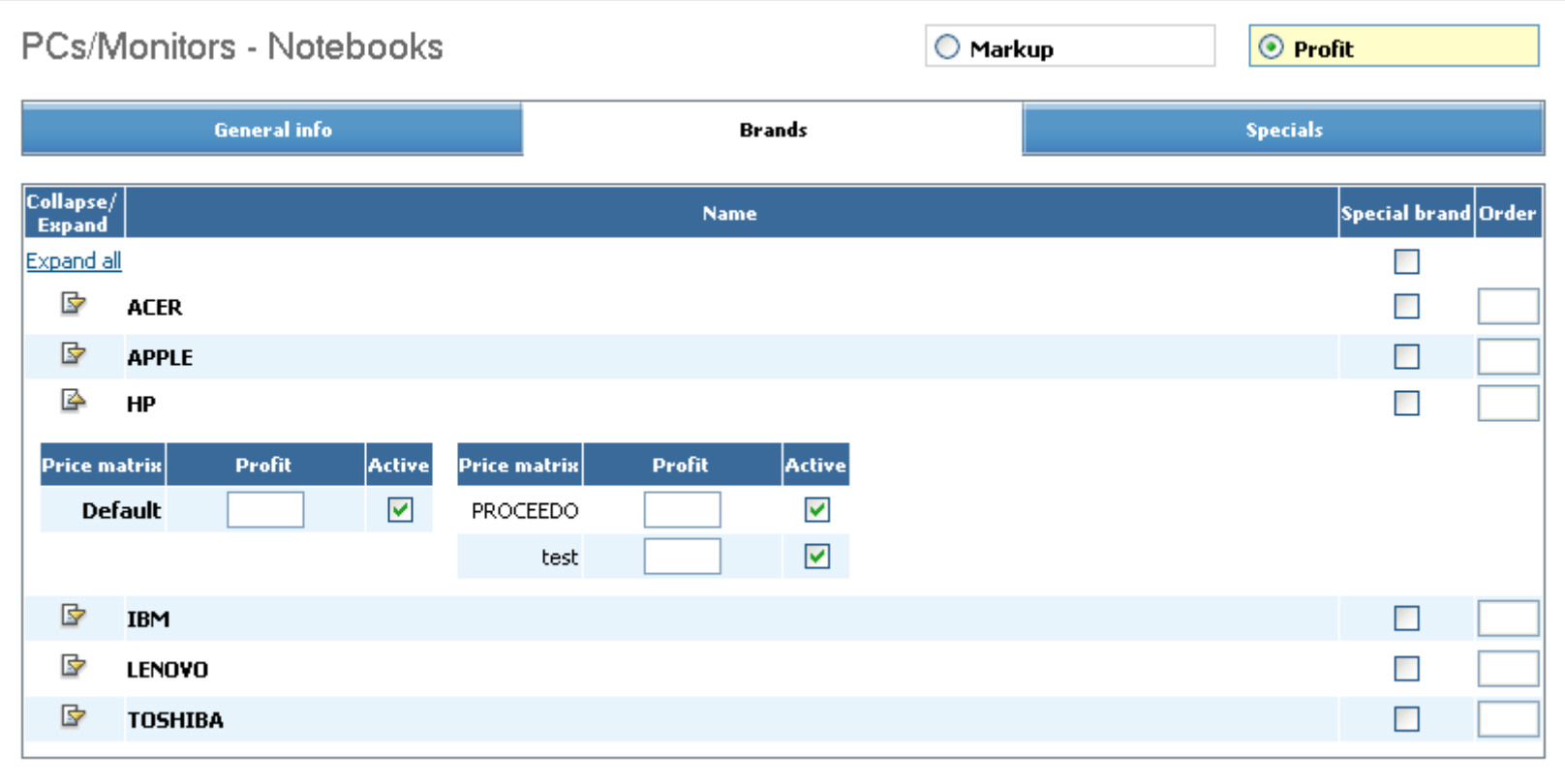
1) The product itself
2) Brand in a certain category
3) A specific brand
4) A category
5) A folder
6) Price range
7) Overall markup
8) Parent matrix

1) The product itself. You can set the markup for a specific product either on the product detail page, explained in the product management section or under Price matrices/Price management. Since setting individual markups for many products will be difficult to maintain, we recommend that you do NOT do this, but instead use specials pricing for frontend or sales campaigns. You search for products in Price matrices/Price management the same way as in Catalog/Product management. Before you start setting prices, make sure the correct price matrix is selected (right under the filter). When you select a new price matrix the page with refresh automatically. You can set profit/markup in % or specify a selling price, which will be converted to profit/markup. The checkbox on each product line indicates whether the product is active in the given matrix. You cannot set a fixed price in this interface since it would be too hard to maintain. Use campaigns with specific expiration date for this purpose.

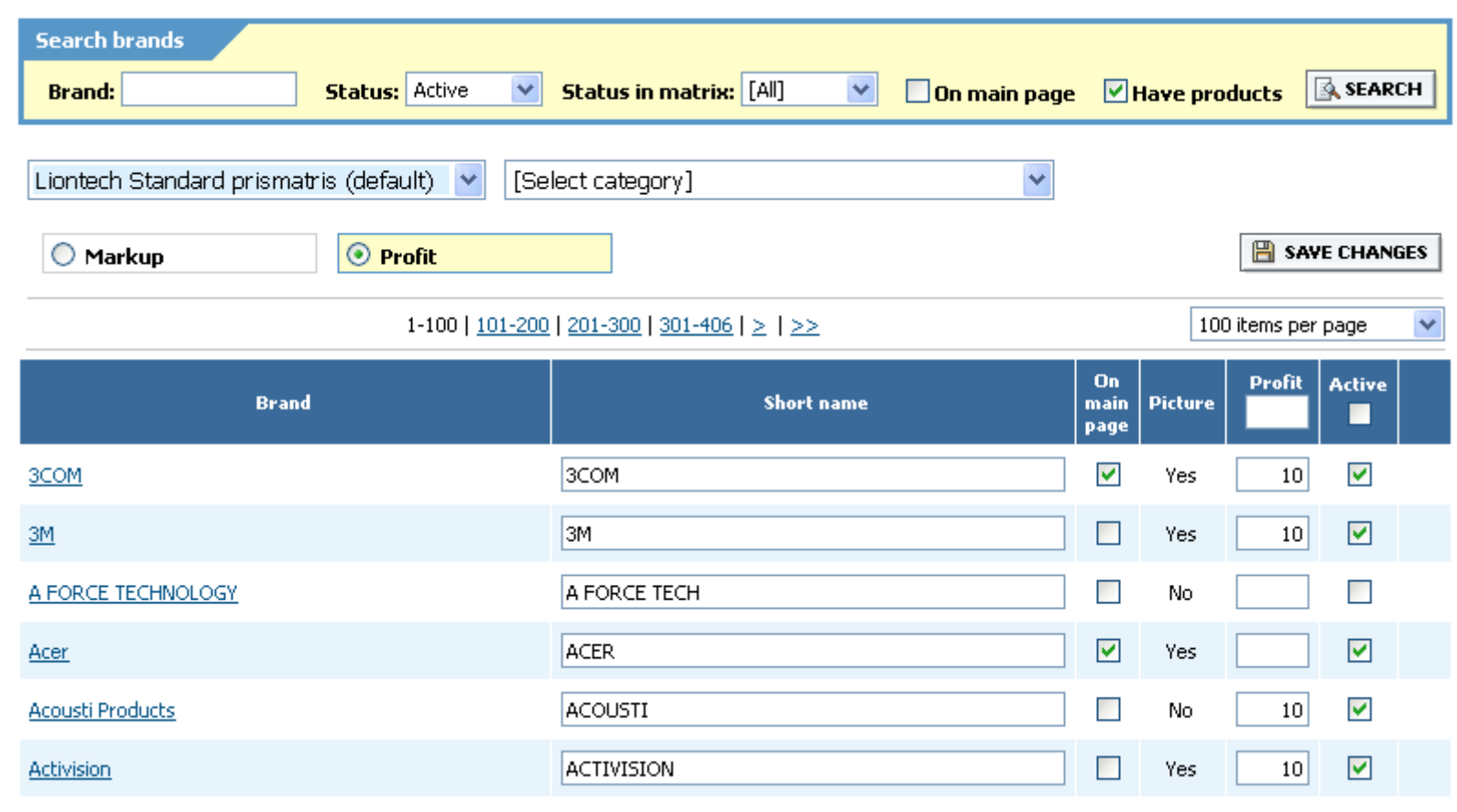


2) Brand in a certain category. You can set the markup for a specific brand in a specific category. For instance, you can set that that all HP Notebooks should have a specific markup. To do this, go to Price matrices/Categories. Select the category tree you will work with and find the correct subcategory. Click on the icon next to the folder to expand the subcategories. Click on a category to go to the category detail page.

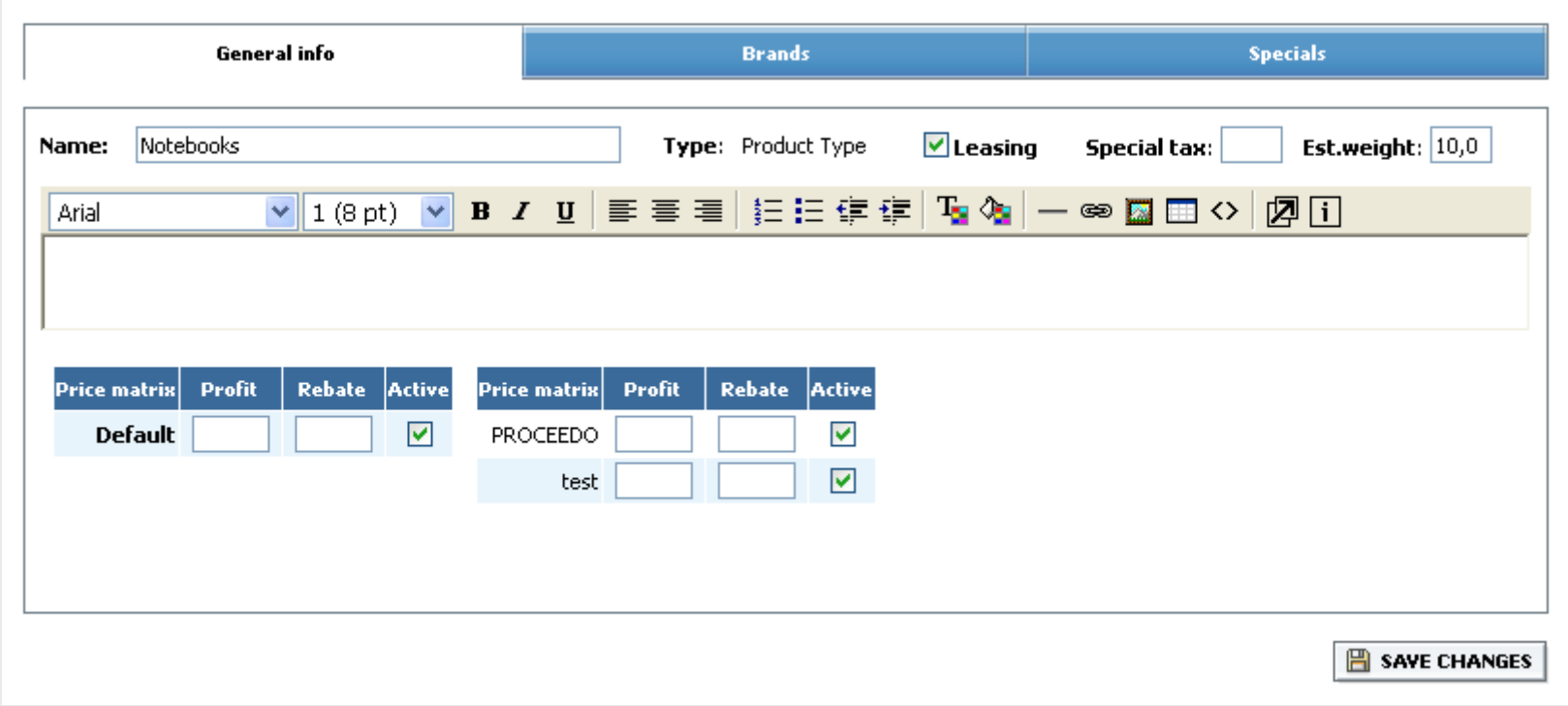
Inside the category detail page you click on the brands tab to see a list of the brands in this category. Clicking on the icon next to the brand opens up a list of all the price matrices, and you can set a specific markup/profit and indicate whether the brand should be active for this category and matrix. On this page you can also indicate, via the special brand checkbox, whether this brand should be promoted when users click on the category on the website frontend. The order field lets you enter the order in which these special brands should be shown. If you add at least one special brand, the frontend customers will get a page with 5 (can be changed) products for each special brand, when they access this category. There is a button on the page for showing all products, and also for showing all products within one brand, for this category.



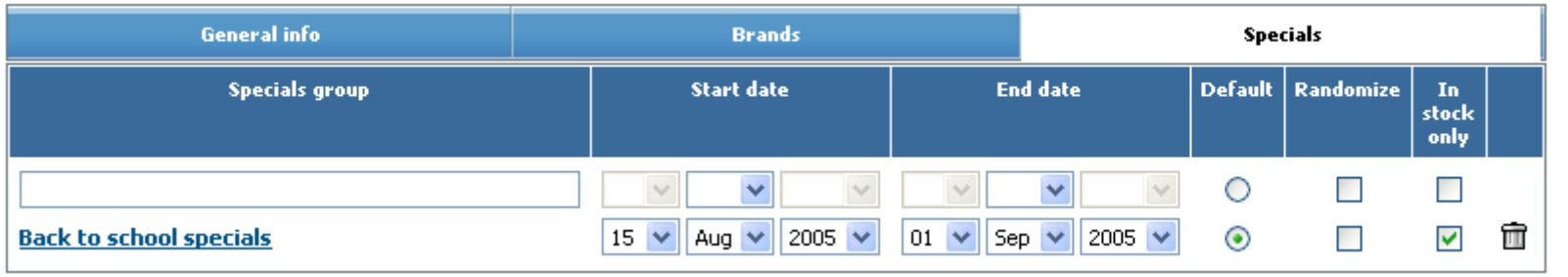
3) A specific brand. You can set the markup for brands under Price matrices/Brands. Remember to select the price matrix you are working with. The page automatically refresh when you change the price matrix. In addition to changing the profit/markup for a given brand, you can indicate if it should be active (checkbox) in this matrix. You can also edit the name for the brand, and if you show a listing of recommended brands you can add/remove a brand by checking on main page checkbox.



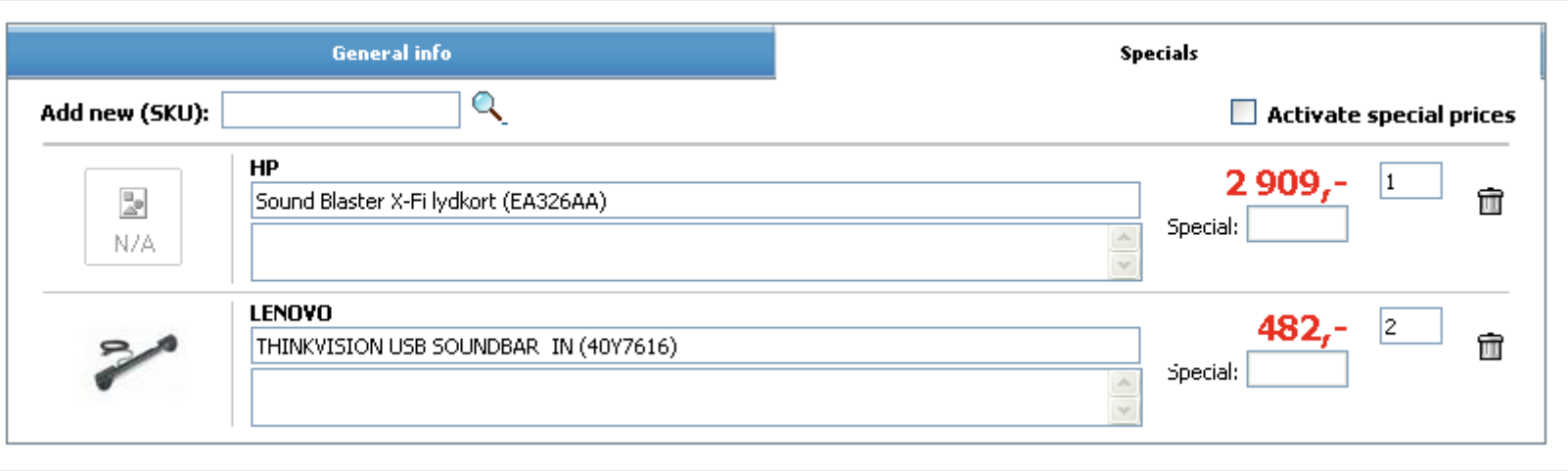
4) A category. You can set the markup for a category by following what you did in step 2, but instead of the brands tab, click on General info. Here you can set the profit/ markup for all the matrices and indicate whether the category is active in a matrix. The HTML editor allows you to specify information that will be shown on the top of the category page in the frontend. The leasing checkbox is used to indicate whether products in this category are available for leasing (if leasing is enabled), and the special tax option is for use when a category contains products that don't have the standard tax (In Norway, for instance, books don't have sales tax).



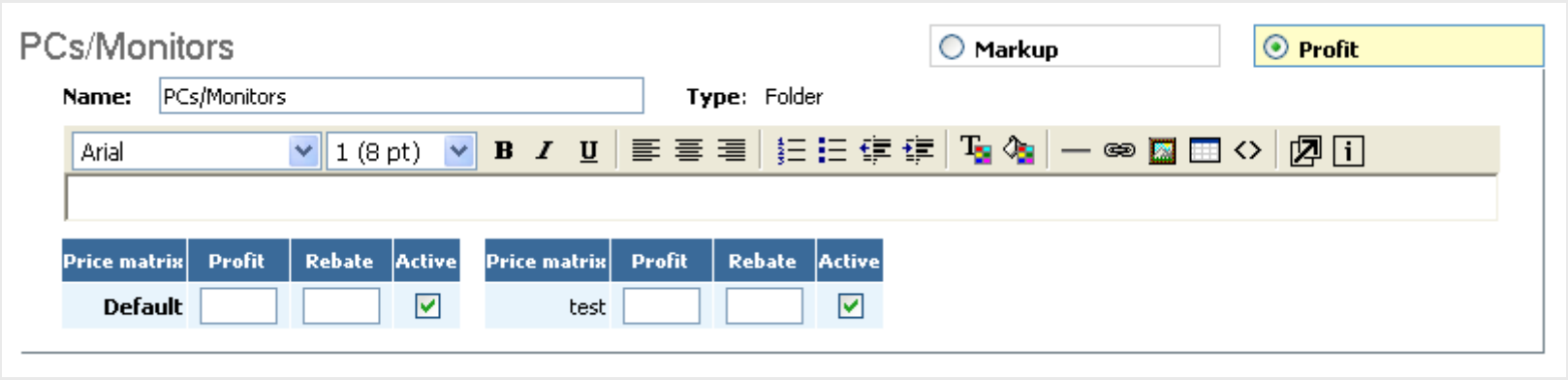
While you are in category details, you can also set promotional products for a category. To access this feature, click on the Specials tab. You can create a new specials list of parts or use an existing one. Randomize means to show the products in no particular order, while the In stock option only shows products that are in stock. You can also set a start and end date for the promotion.



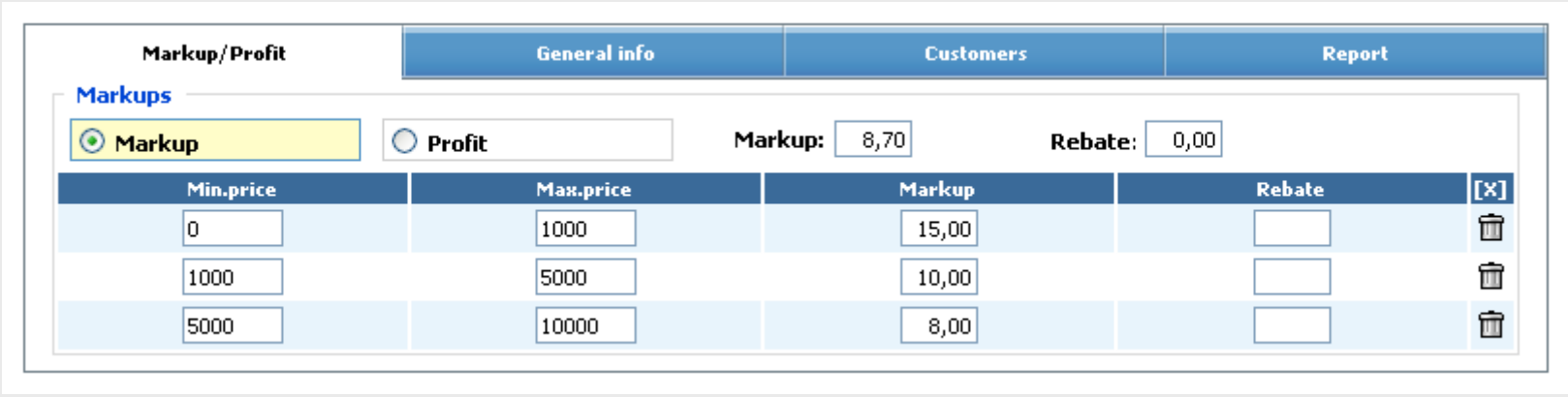
Clicking on the name for the specials list takes you to the detail section. You can add or remove customers on the General info tab, and add or remove products on the specials tab. If you have products in the buffer you use those, or you can use the Add new field and click on the icon to search for products. If multiple matches, a list will be created. Special prices ca be set for these products if you check the Activate special prices checkbox. The last field is for indicating the order in which the products are shown.



5) A folder. A folder is category that contains other categories (and no parts). You set folder markups by going to Price matrices/Categories and selecting the category tree you want to work with. Click on the folder you want to set markup/profit for. You can also activate/deactivate the folder.



6) Price range. You can set markup based on the cost of a product, for instance that products costing from $10 to $20 should have 17% markup. Go to Price matrices/Price matrices and then click on a price matrix you have created. On the markup/profit tab you can write a minimum price and a maximum price and the profit for the range of prices. Create as many price ranges you want by pressing SAVE CHANGES button each time. Please remember to make overlapping prices. If you have a range of 10 to 20, then the next should be 20 to 30, not 21 to 30, in order to make sure that products with prices between 20 and 21 are included as well. Some of our clients use nothing but price ranges.



7) Overall markup. You can set a flat markup for the whole matrix. This is the lowest priority level for the matrix. You do this either on the page where you create the matrix, or on the same page as in 6.

8) Parent matrix. If you have set a parent matrix, the same steps 1..7 will be done in the parent matrix as well.

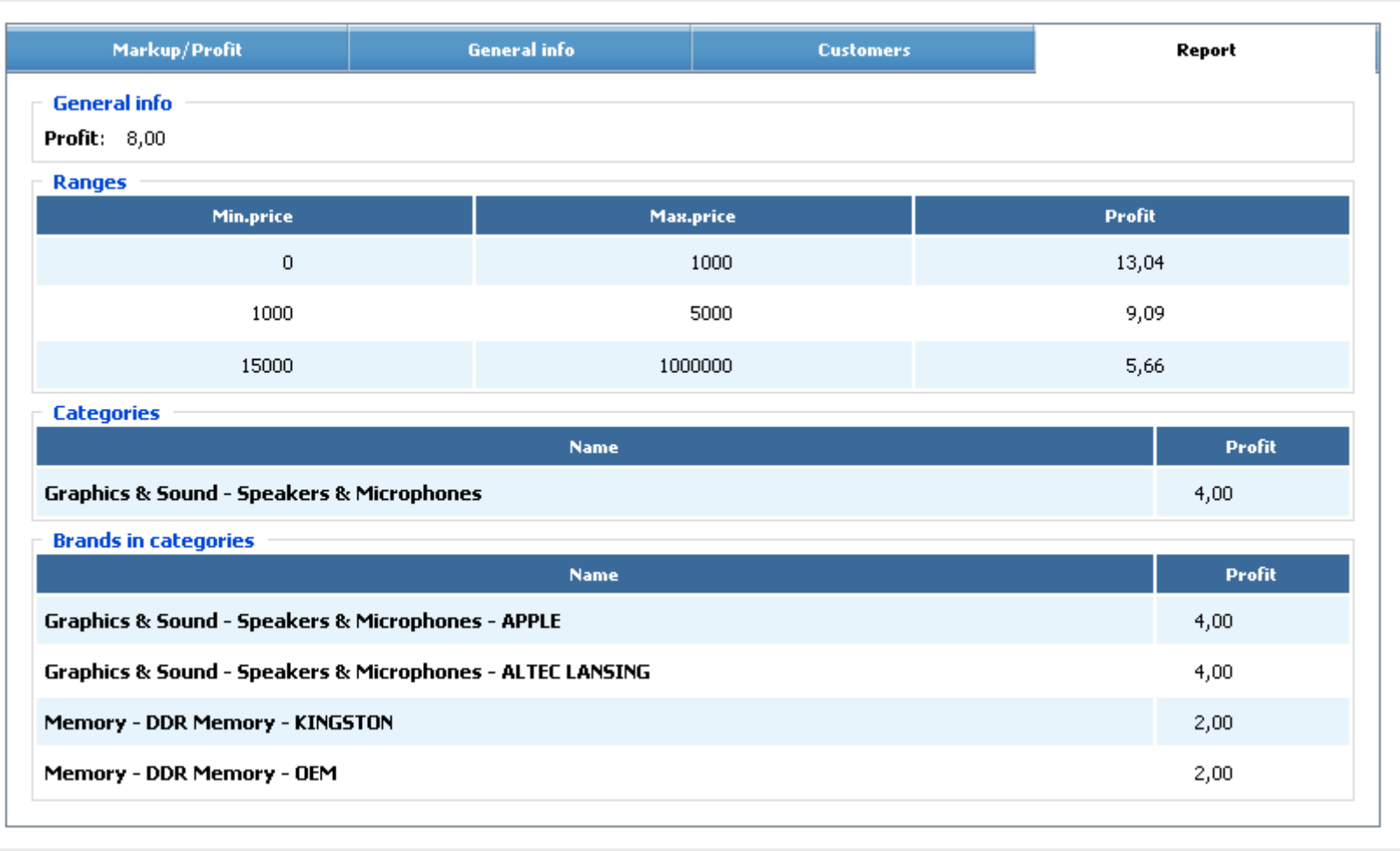
Important:
Please remember that for prices to be taken from a parent matrix, there cannot be any prices set for a particular product in your matrix. This includes the overall markup in step 7. If an overall markup is set in step 7 it will never reach step 8. The same goes for all the steps, of course, but is easy to forget for step 7. Also keep in mind that 0% is a valid setting – if you want to not set anything for a particular step you leave the space EMPTY.

Exceptions:

Special prices/campaigns will override the matrix prices (regardless of whether they are higher or lower). If you have set a special price for a product that appears in the frontend, the matrix will not be used to set the price for this product. Bid prices from manufacturers will override the matrix prices only if they are lower.

Report.

To see a report of the specific settings for a given price matrix, go to Price matrices/Price matrices, click on a matrix, and then select the Report tab.



Markup/Profit | General info | Customers | Report

General info

Profit: 8,00

Ranges

Min.price	Max.price	Profit
0	1000	13,04
1000	5000	9,09
15000	1000000	5,66

Categories

Name	Profit
Graphics & Sound - Speakers & Microphones	4,00

Brands in categories

Name	Profit
Graphics & Sound - Speakers & Microphones - APPLE	4,00
Graphics & Sound - Speakers & Microphones - ALTEC LANSING	4,00
Memory - DDR Memory - KINGSTON	2,00
Memory - DDR Memory - OEM	2,00

PRICING

The Catalog/Vendors page shows when the prices were last updated for this each vendor, and you can rank them according to priority. When one product is available from many vendors the system will normally (if the priority is the same) pick the lowest priced vendor that has a particular product in stock. If you change the priority on Priority field under Catalog/Vendors the system will always pick the vendor with the lowest number first, regardless of price and stock. Same price priority is used if the prices are identical from several vendors, and Priority cost range indicates a loyalty band for a specific vendor. For instance, if the priority cost range is 1% for vendor A and nothing for vendor B, it means that if price from vendor A is 1% higher than vendor B we would consider them to have the same price. Shipping markup makes it possible for you to add a certain % to the prices from one vendor when comparing to other vendors.

Name	Short name	Priority	Same price priority	Priority cost range	Ship. markup	Active parts/Stock	Ordered	Login	Password	Ordering	Last update
DEMO **Parent vendor:** Ingram Micro	DEMO	1	1	%	0 %	6/5	2			None	
Ingram Micro	IM	10	1	%	0 %	30791/4009	13			None	18.07.2006 03:59:17
scribona **Parent vendor:** Ingram Micro	scp	1	1	%	0 %	1/1	0			None	
V **Parent vendor:** N/A	VC	1	1	%	0 %	0/0	0			None	
						39745/4835	**15**				

If necessary, you can create your own vendors (this can be your local warehouse, or vendors that we don't upload information from automatically) using the Catalog/Vendors menu item. Open the Add new box and enter at least a name and short name for the vendor or warehouse before saving changes.

One product can be available from many vendors at different cost prices. We have six options for calculating prices: Using the highest price, average price or lowest price for a product, and the same three options, but only using the vendors that have that specific product in stock. Default is to use average cost price based on the vendors that have the product in stock.

Freight prices

The Configuration/Shipping page lets you set a freight charge based on % of the order and a minimum cost regardless of the order. You can also set a different freight charge when the order reaches a certain amount. Freight charges can be based on zip code. You also have the option to base it on weight and have us upload a freight matrix based on weight and location. This, however, may not work well in all cases because we don't have weight for all the products and estimate it based on category.

Zone/ Zipcode ranges	Min freight cost	Freight cost	Order amount (2nd level)	Min freight cost (2nd level)	Freight cost (2nd level)	Min freight cost (express)	Freight cost (express)	[X]
Default		%			%		%	
1	85	1,1 %			%	0	0 %	
2	95	1,15 %			%	0	0 %	
3	105	1,2 %			%	0	0 %	
4	110	1,25 %			%	0	0 %	
5	125	1,3 %			%	0	0 %	

From	To
0	1499
1900	2099

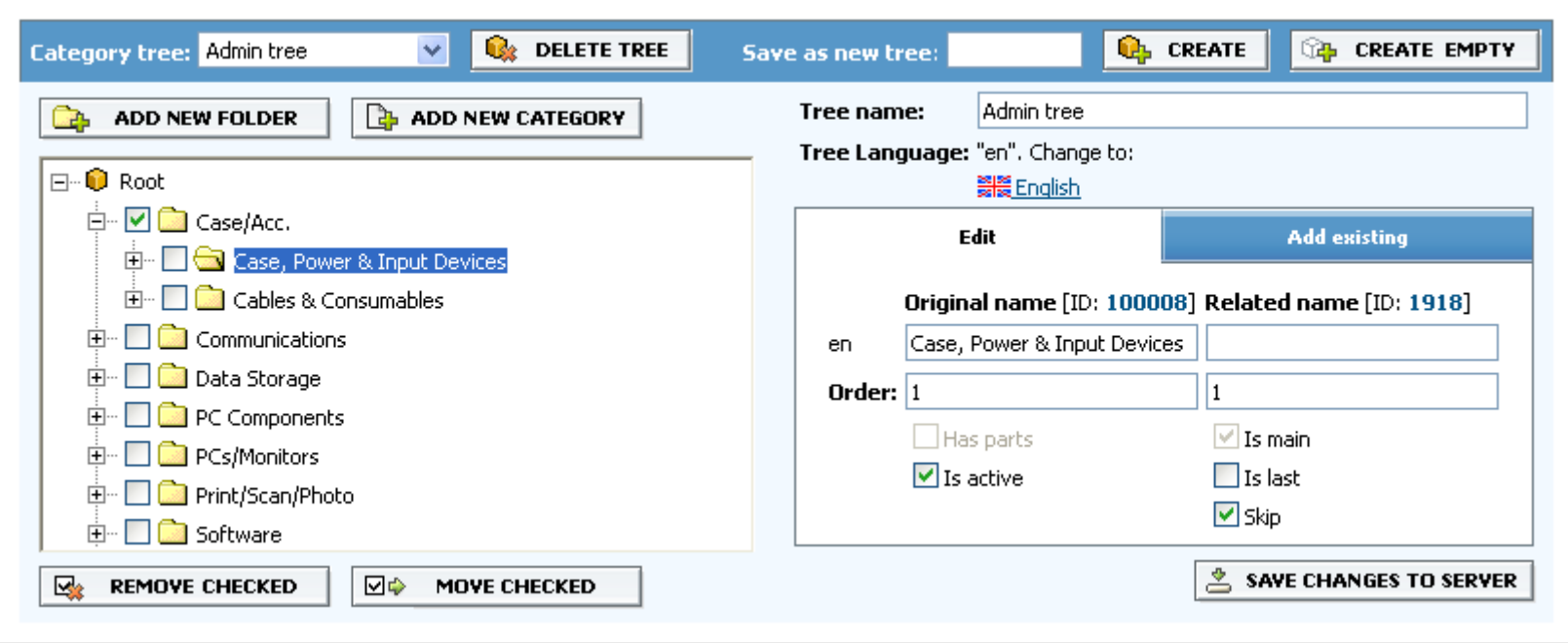
CATEGORY TREES

Create new tree
Modify existing tree
Create own categories
Assign trees to clients

Most likely you have tens of thousands of products in your catalog. Arranging products into the correct categories is a tedious and difficult job. The vendors do not have a common standard and there are no 1-to-1 relationships in categories. One vendor may have hard drives in a hard drive category, another one may have some hard drives in IBM accessories, while a third one splits it according to size, regardless of interface, and so on. We may choose to split it in IDE, SATA, SCSI, etc. Placing so many products in the right categories is a huge job, and for the most part we recommend using the categories that we have created. Creating your own categories may be useful, but only for smaller trees unless you want to make it a fulltime maintenance job.

CATEGORY TREES

The Price matrices/Category page is used for creating new trees, and changing the order or editing the names of folders and categories for existing trees.



In the top left dropdown list you select the tree that you are working with. The tree will be shown below. You can save a new tree based on the selected tree by entering a name in the save as new tree field and pressing the create button. If you want to change the name of the selected tree you can edit the name in the Tree name field and pressing save changes to server in the bottom right corner. If your webshop has options for several languages you choose which language you are working on with Tree language.

Selecting a folder/category means to click on the name of the category. The selected category will have the name inverted, on dark background.

Moving folders/categories

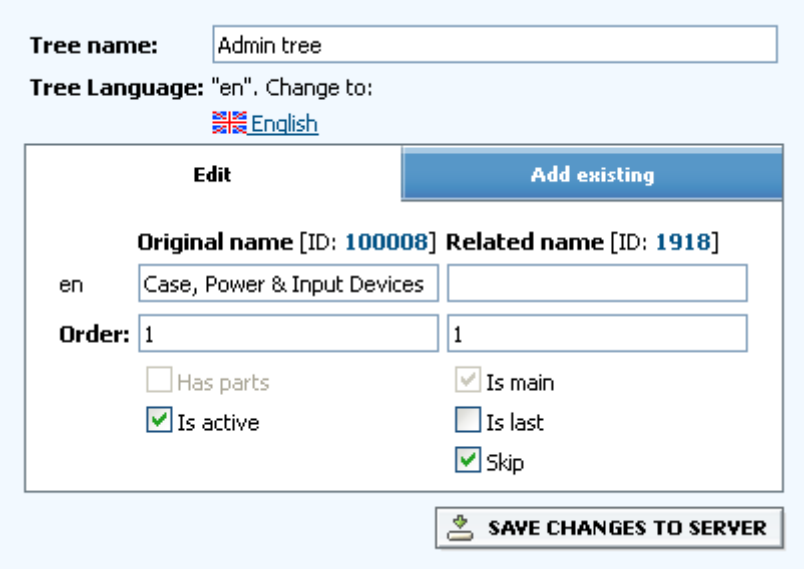
You can move a folder or category to a different folder: This is done by checking the box next to one or several folders or categories, selecting a folder, and then clicking on the move checked button. Changes are saved when you press the save changes to server button.

Removing folders/categories

Check the box next to one or several folders and click on the remove checked button. Changes are saved when you press the save changes to server button.

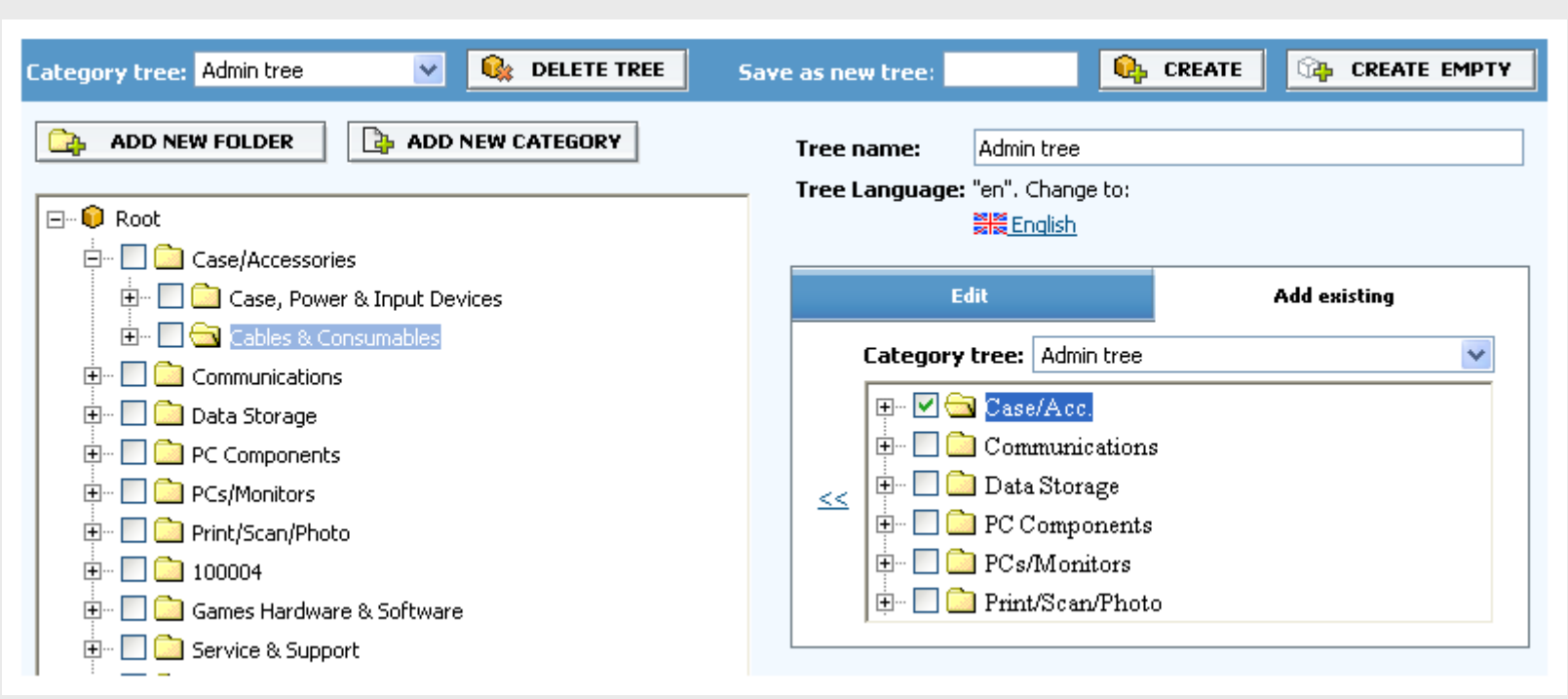
Specific settings of folders/categories

Select a folder of category. On the right hand side you can now change the name or indicate the order in which it should be shown (the Edit tab). For categories with the same order we sort the alphabetically. Is active means that the category is shown in the frontend. Is last is used to combine categories. Create a folder, set Is last, and place the categories you want to combine in this folder. The folder will then be shown as a single category with products from all the categories. Skip is used to indicate that the categories under a given folder are shown instead of the folder (basically, skipping a level).



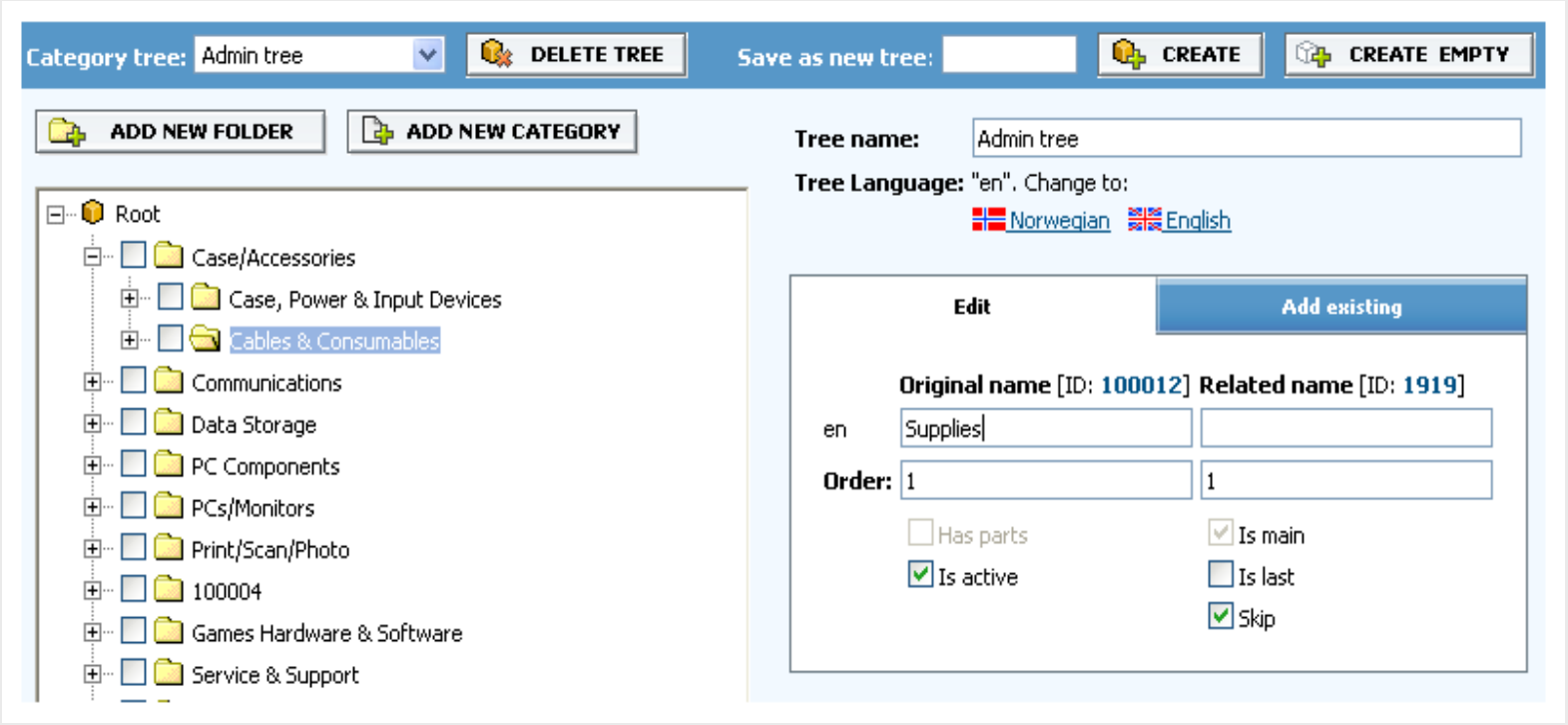
Add existing categories to a tree

On the right hand side you have a tab called add existing. This is used to select one or several folders categories in one tree and by pressing the << link adding them to the tree you are working with on the left hand side.



Change names or orders of categories

Select any folder or category and change the name by writing a new name in both the Original name and Related name fields on the Edit tab to the right. If you want to change the order, enter a new number in both order fields. Lower numbers are placed higher. Same order means it is done alphabetically.

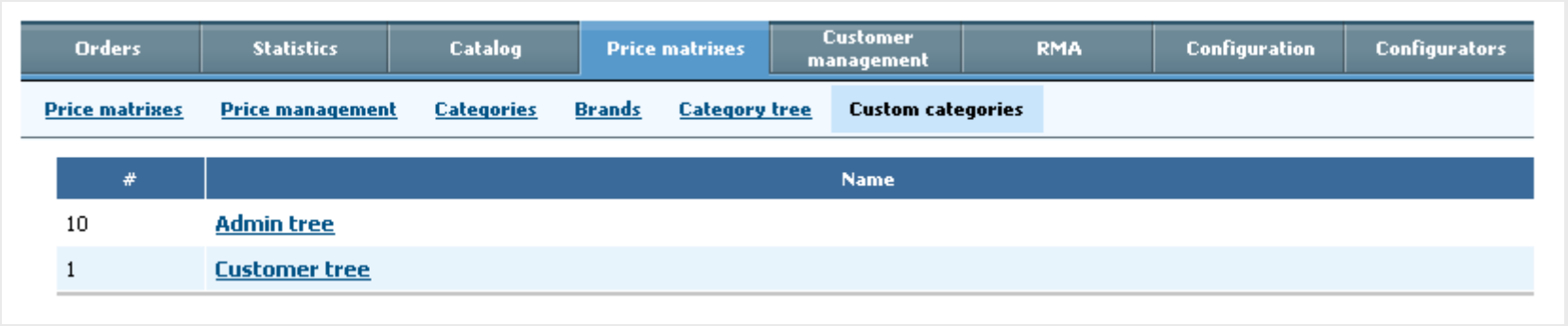


Important

You can move categories around, rename them, change the order, place them in new folders that you make yourself, etc and the products will still go to the correct category. However, if you make NEW categories the system will not know what products to put in these categories. To tell the system which products should be in which categories you use Price matrices/Custom categories. Keep in mind that a product can only be in one category in the same tree, but you can add custom categories to any tree you like, or create a tree that only has custom categories if you want.

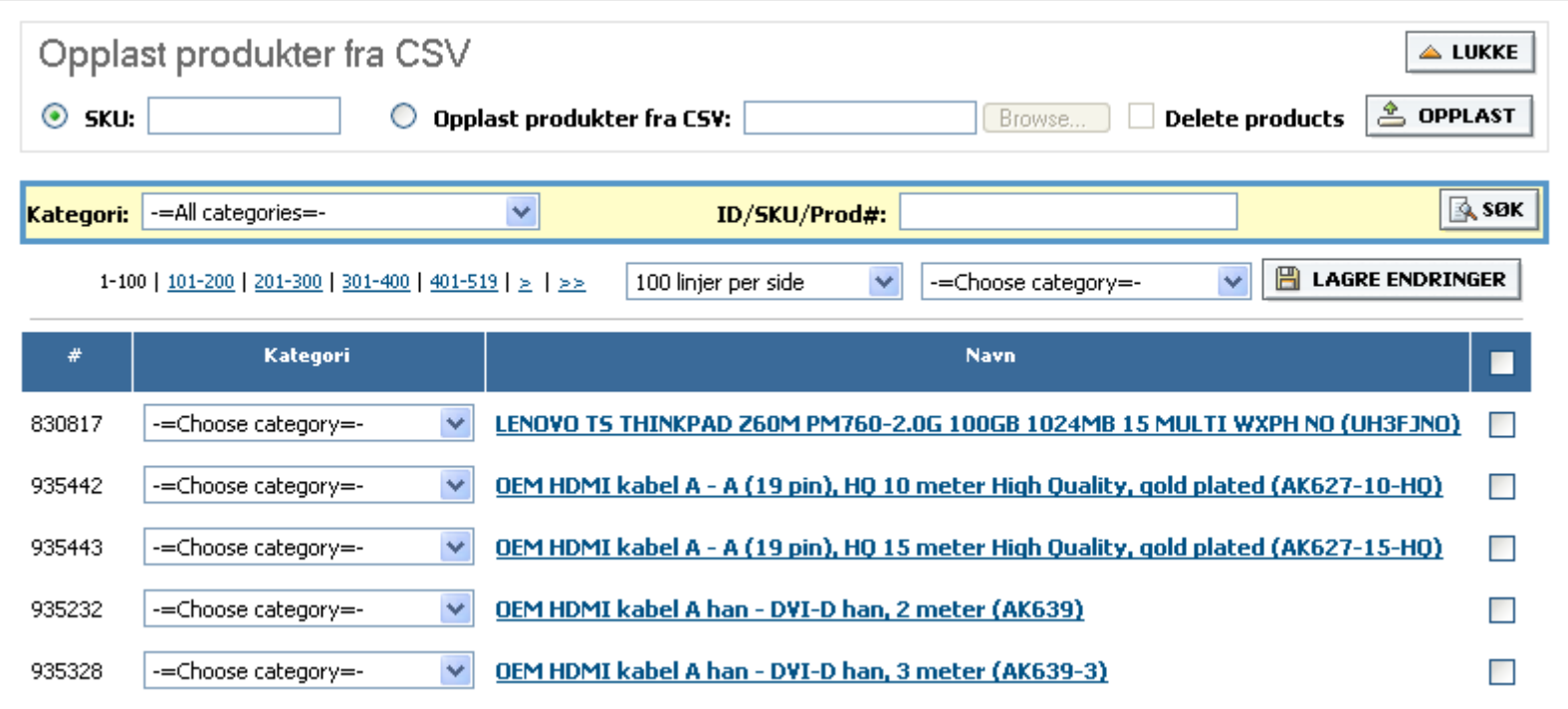
CATEGORY TREES

Price matrices/Custom categories gives you a list of available category trees. Click on the tree that has categories created by you.

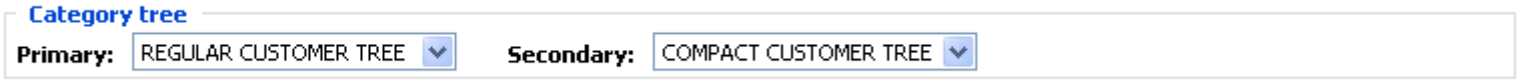


CATEGORY TREES

After you have selected a tree you have to upload products. You can do this one by one, or using a file. Enter a manufacturer part number in the SKU field and press the upload button, or select upload from file and browse for the file before pressing the upload button. If you select the delete products checkbox, all the products that were already there will be removed, and only the new ones added. If some of the products used to be there, they will automatically be put in the same category as before. The file is a simple text file with one part number per line. Newly added products are listed first, with choose category indicated in the category list. Select which category to place the products in and save your changes.



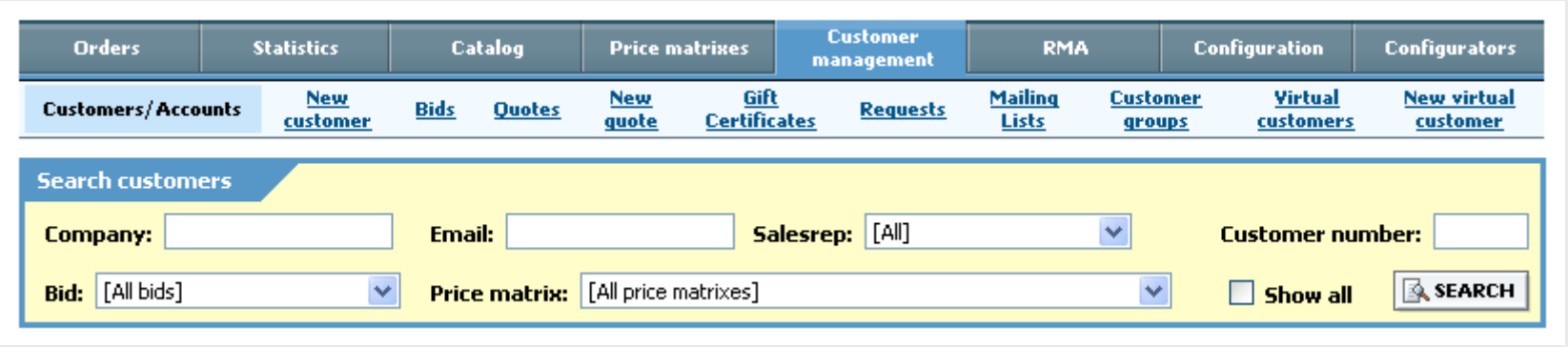
You can assign one or two category trees to a customer. It is very common to make a second tree that contains the key products that a specific customer buys, often based on a bid or a longterm contract, making the second tree a subset of the regular category tree.



CUSTOMER MANAGEMENT

Customer list
Customer details
Customer requests
Mailing list
Virtual customers
Customer specials/quotes (frontend)

Customer management/Customers gives you a list of all the customers; with basic statistics, and you can search for a particular customer by using the filter. Clicking on the head-icon will log you in on the website as this customer, and clicking on the customer name will take you to the customer detail page



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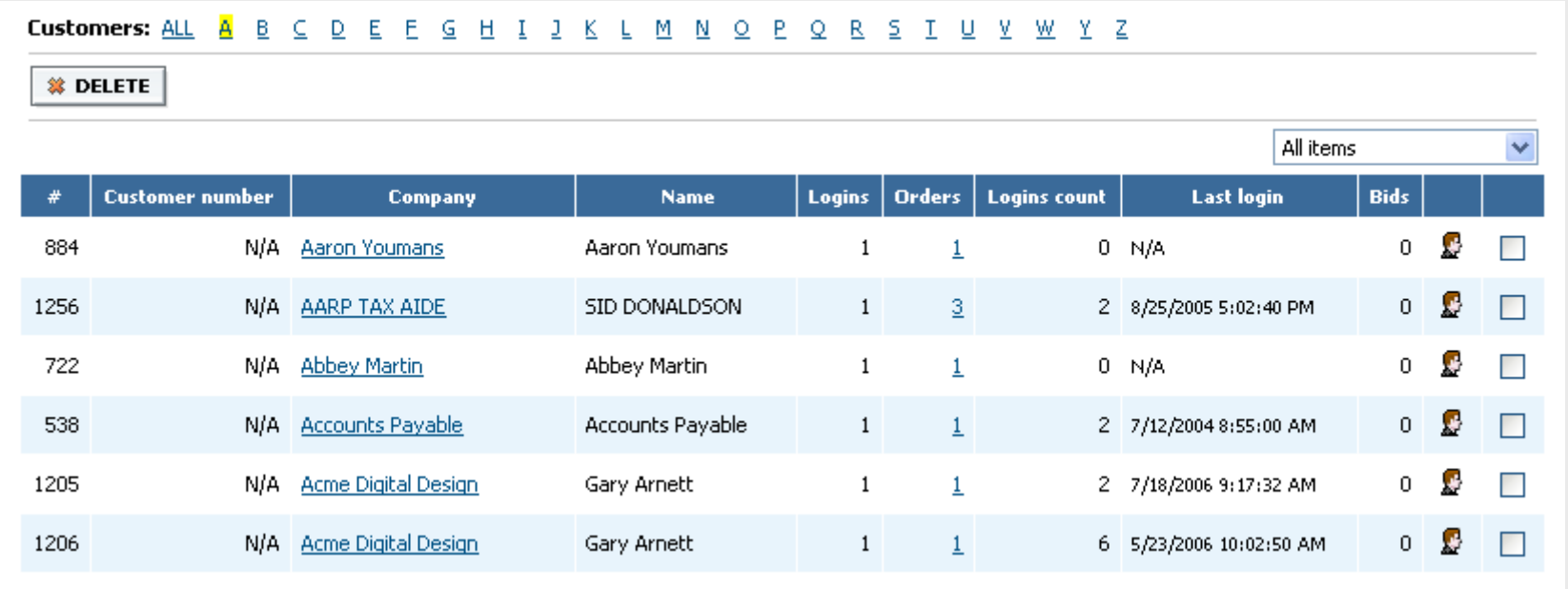
CUSTOMER MANAGEMENT



#	Customer number	Company	Name	Logins	Orders	Logins count	Last login	Bids		
884	N/A	Aaron Youmans	Aaron Youmans	1	1	0	N/A	0		
1256	N/A	AARP TAX AIDE	SID DONALDSON	1	3	2	8/25/2005 5:02:40 PM	0		
722	N/A	Abbey Martin	Abbey Martin	1	1	0	N/A	0		
538	N/A	Accounts Payable	Accounts Payable	1	1	2	7/12/2004 8:55:00 AM	0		
1205	N/A	Acme Digital Design	Gary Arnett	1	1	2	7/18/2006 9:17:32 AM	0		
1206	N/A	Acme Digital Design	Gary Arnett	1	1	6	5/23/2006 10:02:50 AM	0		

There are two types of “customers”:

• **standard customers.** Private customers typically fall under this category. These have no separate customer cards in admin, and use the standard settings for prices, payment methods, etc

• **special customers.** Corporate/government customers often need to have accounts where you can place them in specific, non-standard price groups, give them access to bid prices, set credit terms, give them their own category trees, etc.

Keep in mind that all customers, regardless of type, have a login and password to check orders.

There are several reasons for separating the customers like this: Private customers that pay with credit card will not be invoiced, and the orders may not need to be transferred to an erp-system on separate accounts. If you sell to both private and corporate customers, having 5000 private customers clutter the customer list makes it so much harder to find the 500 corporate customers you do give special attention to. For the solution itself it is obviously faster to search in a list of 500 clients than 5500, and since we cache prices and other things it is good to have a big group of standard customers that don’t require separate consideration.

CUSTOMER MANAGEMENT

The customer list itself is split in the starting character of the customer name, from 1..9, A..Z. There are eleven columns:

1. Internal customer ID. The number we have given to the customer in our database. There is no use for this number i our solution. We recommend that you work with the customer on customer name / email address basis instead of a number that is easily forgotten.

2. Customer number. This is the main customer number that you have given this customer in your own accounting / erp-system (not required, and may be empty - but usually the key when we transfer data to your erp-system).

3. Company name. This is also a link to the customer detail page.

4. Name. This is the person responsible for the account for the given company (attn.:)

5. Logins. How many different logins (users) this company has.

6. Orders. How many orders this company has placed. This is a link that when clicked with bring you the order list with all the orders for this company.

7. Logins count. The number of times anybody from this company has logged on to the webshop.

8. Last login. When somebody from this company logged in last. Logins by admin are not counted.

9. Bids. The number of bids (special case pricing) that are applied to this customer.

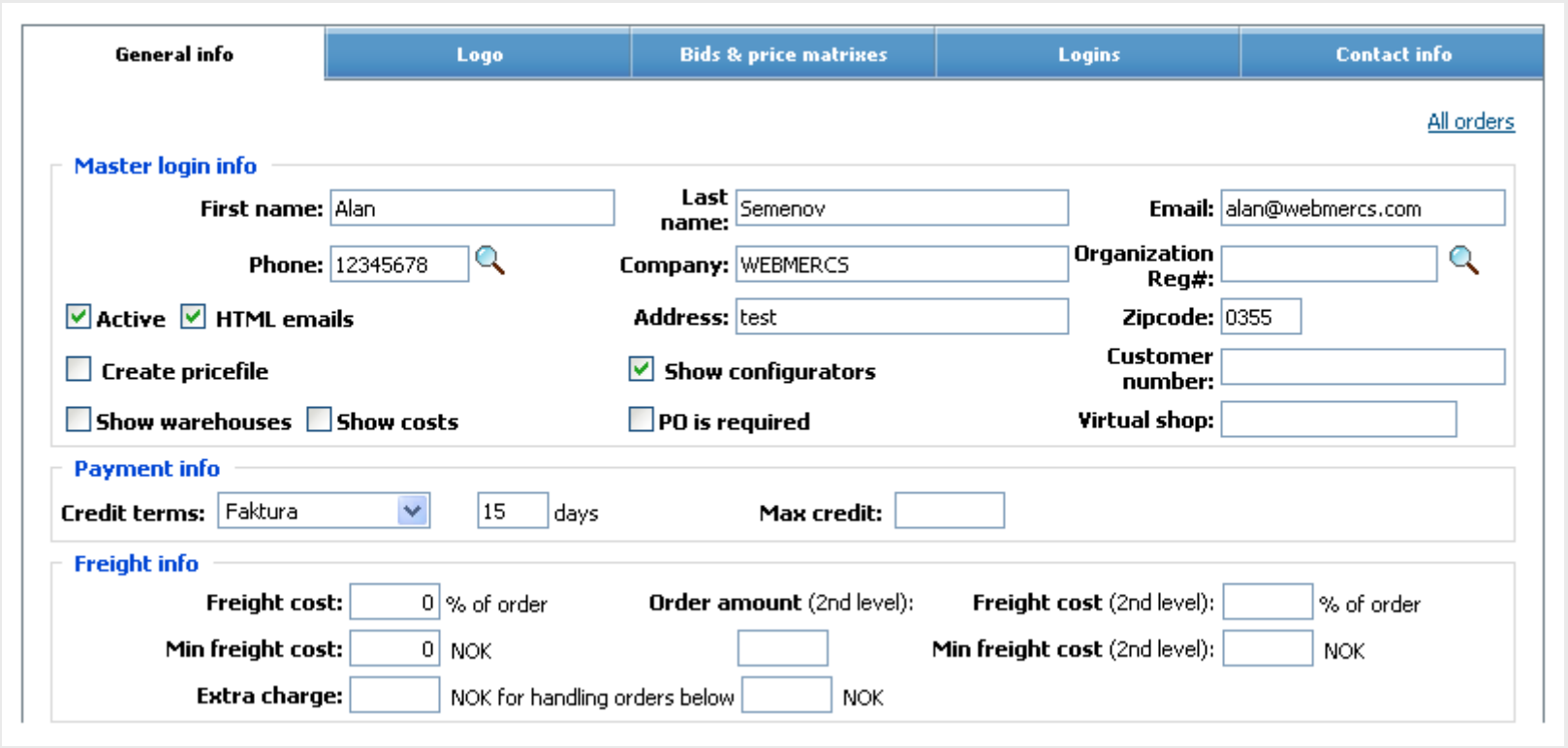
10. Icon of a head. Clicking on this head logs you - as admin - in as this customer. Since the customer may have many users/logins, when clicking on this head in the customer list we pick the first master account on the account.

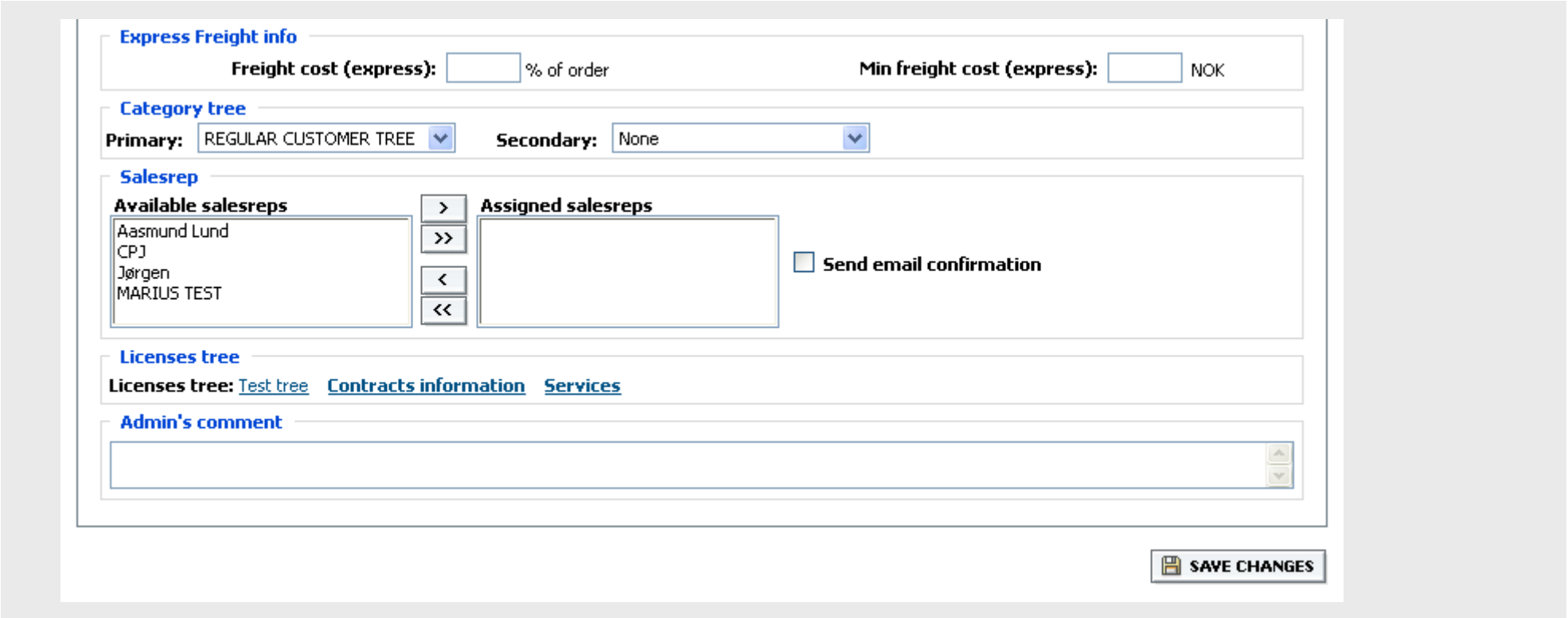
11. Checkbox for selecting a customer. Today there is one use for it - deleting the customer, using the “delete” button above the list.

Above the customer list there is a filter where you can search in the list based on different criteria: Company name, email address (of user/login), the salesrep, customer number, applied bid, price group (price matrix). For showing the deleted customers you can select “show all”.

CUSTOMER MANAGEMENT

The customer detail page contains settings for a specific customer. After the initial setup you will use this page mainly to create new users/logins, and maybe change the price group.





General info is the main tab. The top part has fields for company information (the first/lastname that is referred to is the contact person). The phone number and organization number fields may have lookup functionality in online databases depending on your localization. We look up zipcode, so there's no field for city/place. The following fields require special consideration:

- **Active.** If you don't want the customer to be allowed to place orders, log in, etc - uncheck this box.
- **HTML emails.** Default is ON. Order confirmation is sent via HTML email. You can turn this off for those customers that prefer (or require) text messages.
- **Create pricefile.** This setting makes it possible for the customer to download a complete pricefile from their account pages. Mainly used for distributors.
- **Direct ordering.** Ability to place orders directly with vendors without admin approving the orders first. Use this setting carefully. If set, the system will automatically pick the lowest priced parts that are in stock and place orders for the products directly with the selected vendors.
- **Show configurators.** Default is ON. This setting decides whether the memory and accessories configurators are shown for the customers in the frontend.

- **Show warehouses.** This will show stock for the different vendors of a product in frontend when this customer is logged in.
- **Show costs.** This will show the cost for different vendors of a product in frontend when this customer is logged in. It can be used for internal accounts, and we have seen it being used for certain government agencies that would like to have a live audit of their purchase agreement at all times.
- **PO is required.** When set ON, this setting doesn't let the customer place an order unless the reference / purchase order field is filled out.
- **Customer number.** This is the customer number in a corresponding program, such as the ERP-system. For companies with several branches, you can override this setting in a given invoice address. If the customer number for an invoice address is empty we use the setting here on the general info page.
- **Virtual shop.** You can set a name for a virtual shop where the customers can use a link to get the same prices, bids, etc as this customer account - without login. Typical use for this is sales to groups of people that should all create their own accounts, but at the same time should not have the standard pricing (and maybe the standard setup doesn't allow for purchases by non-logged customers). If you for instance called the virtual shop "test", the the link to access this shop is www.yourshopdomain.com/test.shop . We automatically add the .shop. The logo of the virtual customer will be shown in the heading (frontend), but the customer will not be logged in.

Payment info contains information about the payment method that is approved for this customer. Typical options are credit card and invoice. For invoice it is required to enter number of days. The credit line field may or may not be used. For this to have any effect we need to know which orders are paid, which requires either entry of this in the solution, or two-way communication with an erp-system.

Freight info lets you override the standard settings for freight cost for this customer. You enter this as percent of order amount and a minimum value. This goes for order amount equal zero. You can do the same for a 2nd level, giving different freight cost when the customer has reached a certain level. You then enter this level (such as $5000) in the order amount (2nd level) field and specify the % and minimum again. Express freight info is not used today. Admin fee can automatically be applied to orders under a certain amount.

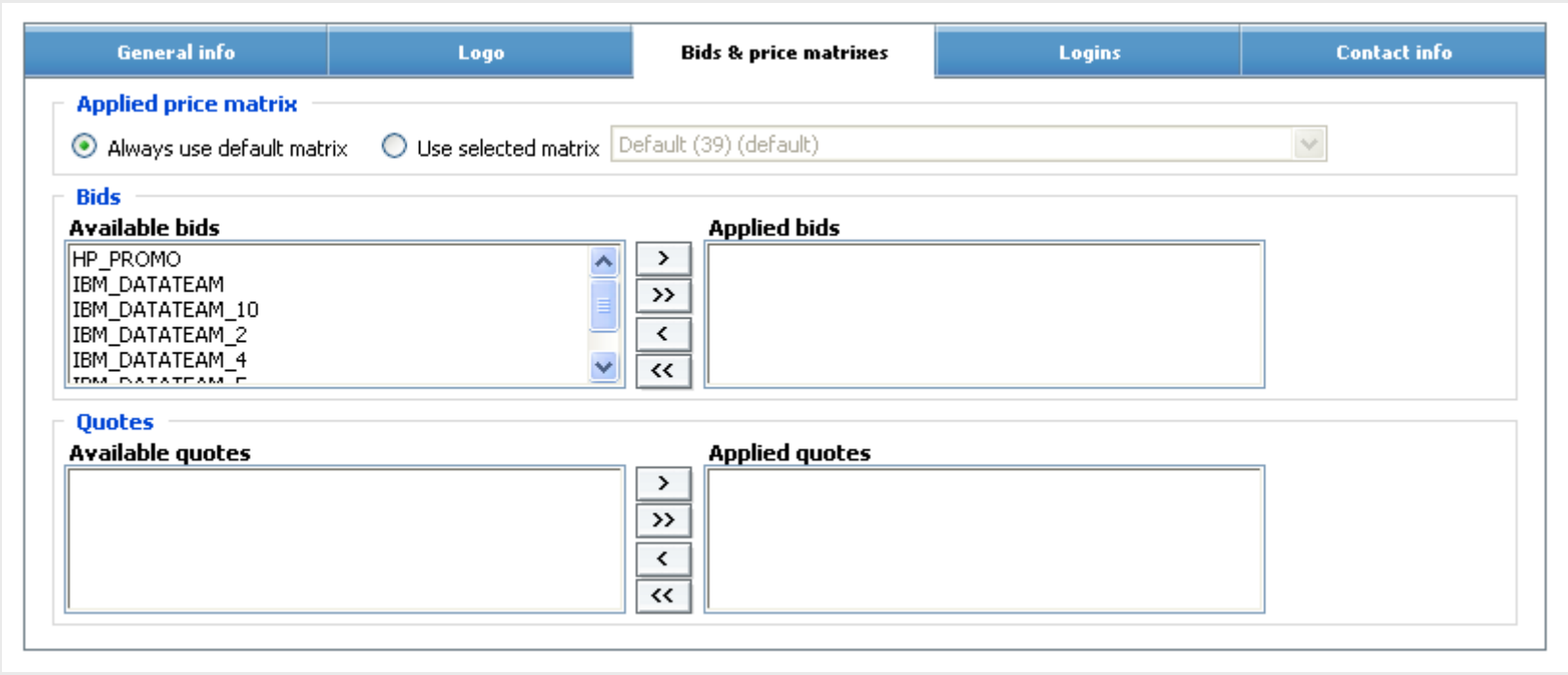
In the category tree section you set which category tree the customer should see when he logs in. You can also specify a second tree. The second tree is what will be shown first when the customer logs in, but he can access both trees. The secondary tree is typically used to give the customer a tree that makes it easy for him to purchase certain items. Many dealers choose to make a special tree for bids or cases, or maybe just the main items that a customer normally buys to make the process even simpler for him.

You can assign as many salesreps as you want to one customer. Select on the left hand side and click the button to move to the right. The checkbox for sending email confirmation will, when ON, send email confirmation to the sales rep when the customer places an order.

The admin comment in customer details is added to the admin comment of every order placed by this customer, so that you won't miss it (exclamation mark in order list).

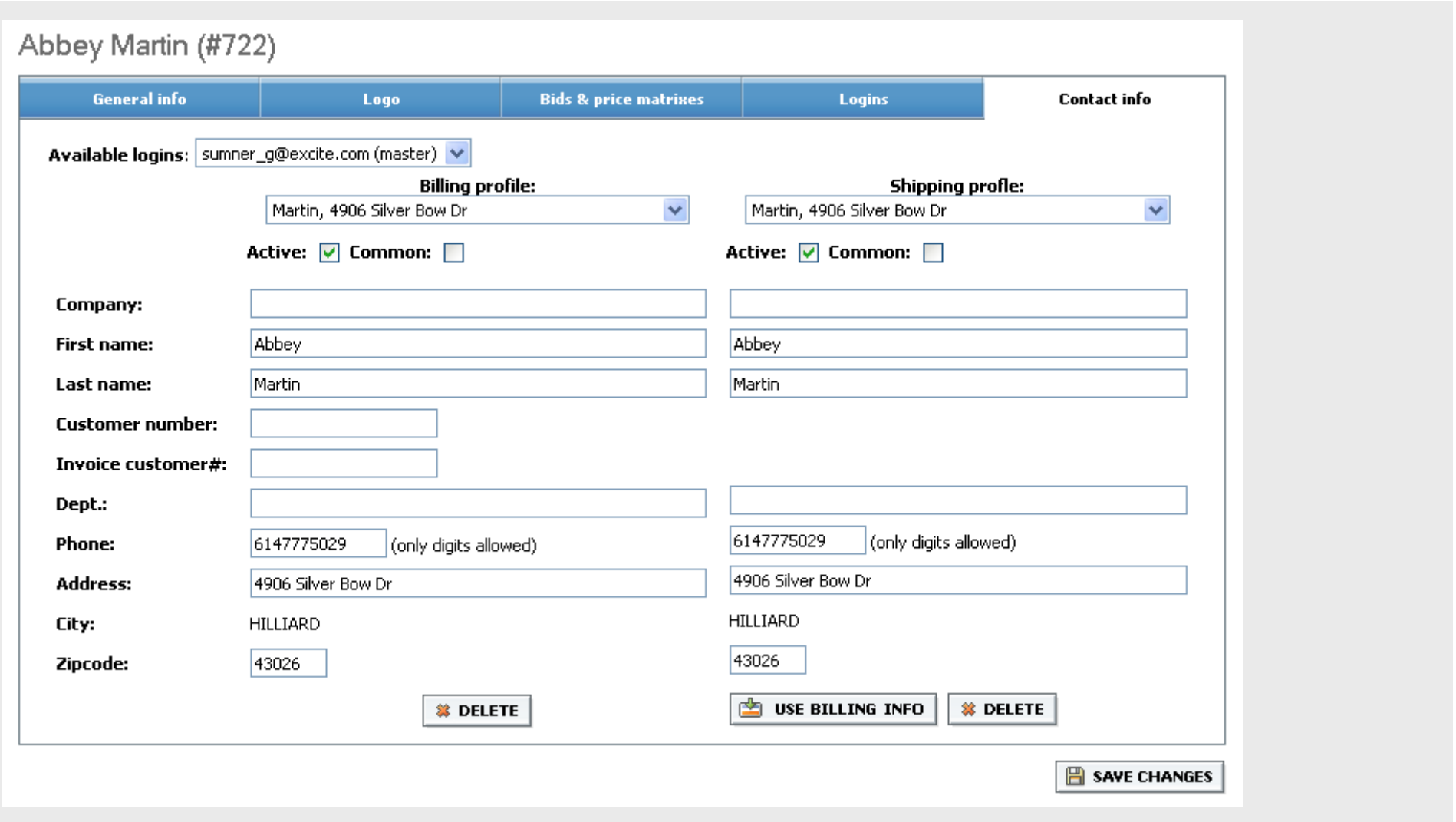
The logo tab in customer details is for uploading customer logo. Depending on the website design, this logo will be shown in the heading when the customer logs in.

Bids & price matrices tab lets you select the correct price matrix for the customer, and assign bids and quotes.



Logins tab is used to create logins (username, password) for this customer. Email address is always used as username. You select if this login is private, corporate or government, which decides the payment methods that are made available in the front. If change shipping info is set, this user can create new delivery addresses. Master means that this user can create and manage users under “my account” in the frontend. Approver means that this user can approve orders for other users. When there is at least one approver, you can set the order amount and select approver for any user. If you set the amount 15000 and select an approver, it means that this user needs approval from the other user if the order amount exceeds 15000. Active means that the login can be used. Send email confirmation field should only be used if you want to send order confirmations to somebody other than the user itself. Separate emails by semicolon. The head-icon logs you in in frontend as this user. The email-icon sends login info to this users email (convenient if you created the account for him or changed the password). The paper icon takes you to the contact info tab with this user selected.

The Contact info tab shows you all the billing and shipping profiles for this customer. Select a user from the available logins dropdown. If you want many users to share a profile (so that you don't have to write it several times), select the "common" checkbox. You can create new profile by selecting "new profile" in the dropdown menu.

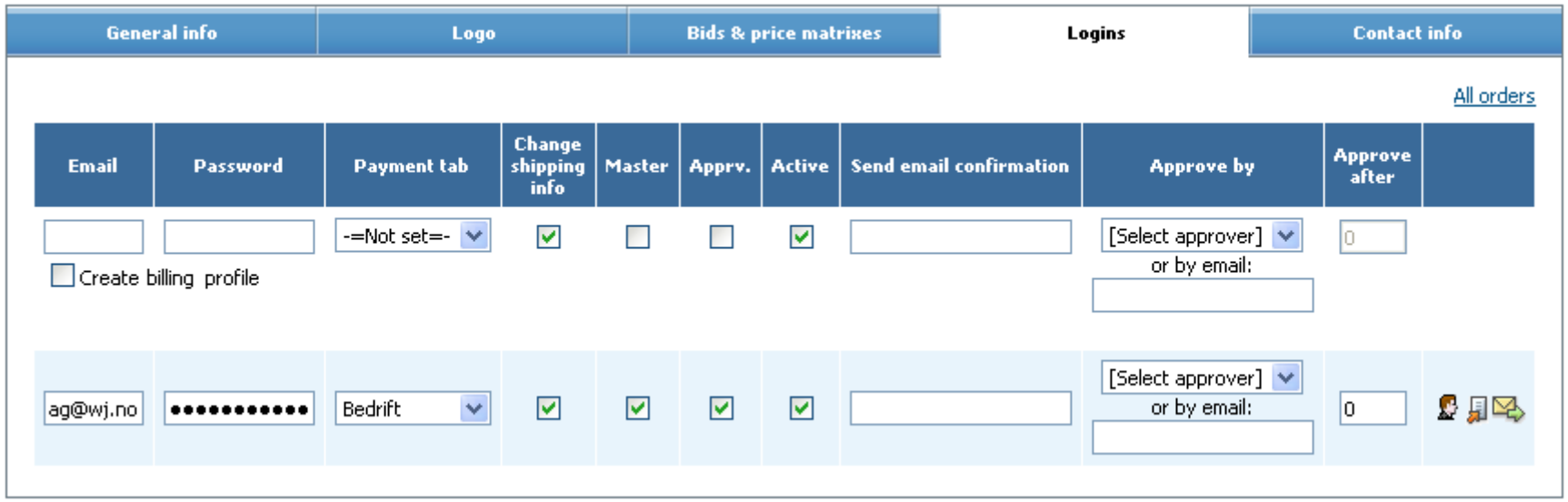


Customer requests

Even if you allow placing orders for new customers, new corporate customers would probably like to set up an account before placing the first order to get correct prices and credit terms. The requests from the frontend website ends up in Customer management/Requests. To approve the request and create the customer, click on the green V, otherwise decline by clicking on the red X. [show picture of Customer management/requests with some requests in it]

Frontend

One of the most useful customer management features is the ability to log in to the frontend website as this customer (using the head-icon described several times in this documentation).



Being logged in as the customer you see exactly what the customer sees; correct prices, bids, his favorites, shopping lists, etc. You also see all the cost prices and stock for separate vendors (while the customers only see combined stock).

HP Compaq t5520 Via Eden 800 MHz 64M Flash Rom 128M DDR SDRAM Windows CE Net Thin Client

Price: **$367.86**

SKU# PY356AA#ABA

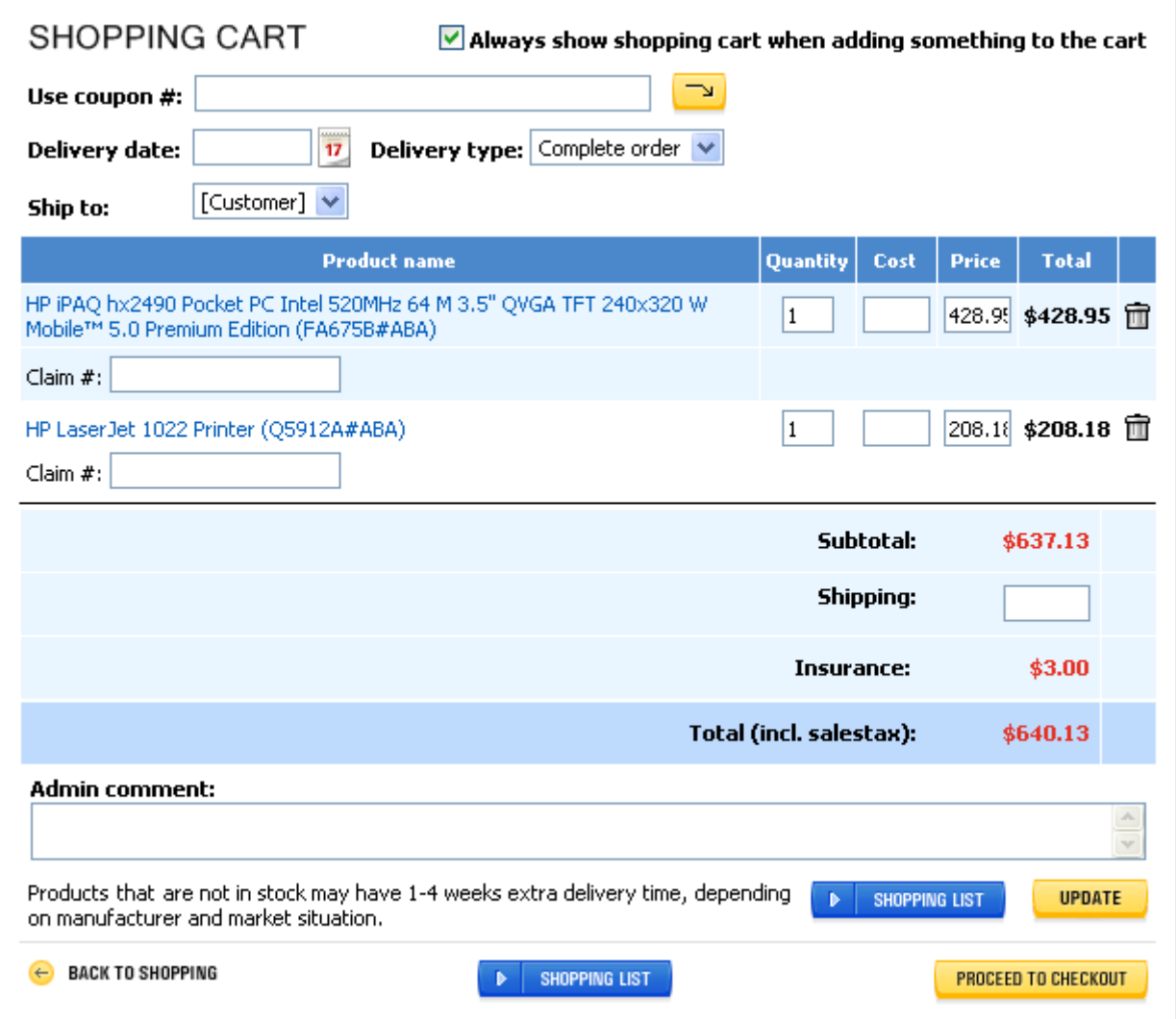
Rating: ☆☆☆☆☆

(Write a review)

ADD TO CART

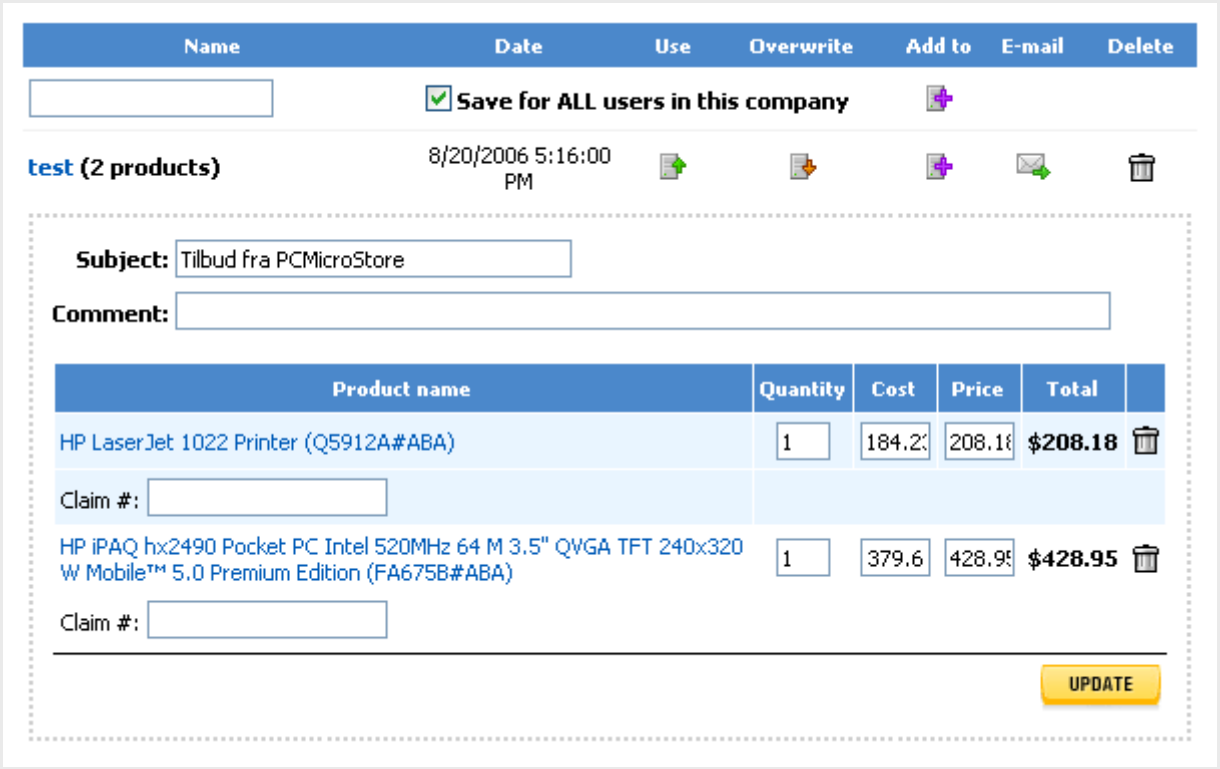
Vendor/BID	Stock	Price
TechData	120	$333.95
Ingram Micro	100	$325.54

When placing order for the customer you can change both the selling price and the cost price. Please keep in mind that not all vendors support changing the costprice.



CUSTOMER MANAGEMENT

The easiest way to create customer quotes is also in the frontend. Put the products in the shopping cart and press the shopping list button. You can now change the selling prices and email it to the customer. The customer can easily find it in his shopping list and add it to the cart with one click.



FRONTEND MODIFICATIONS

Frontpage specials
Modifying banners / information spots / information pages
System settings

The main page of your shop has some elements that can be changed. A typical site has super specials (larger promo product sections), specials (product placement on the front page), banner or information spots.

FRONTEND MODIFICATIONS

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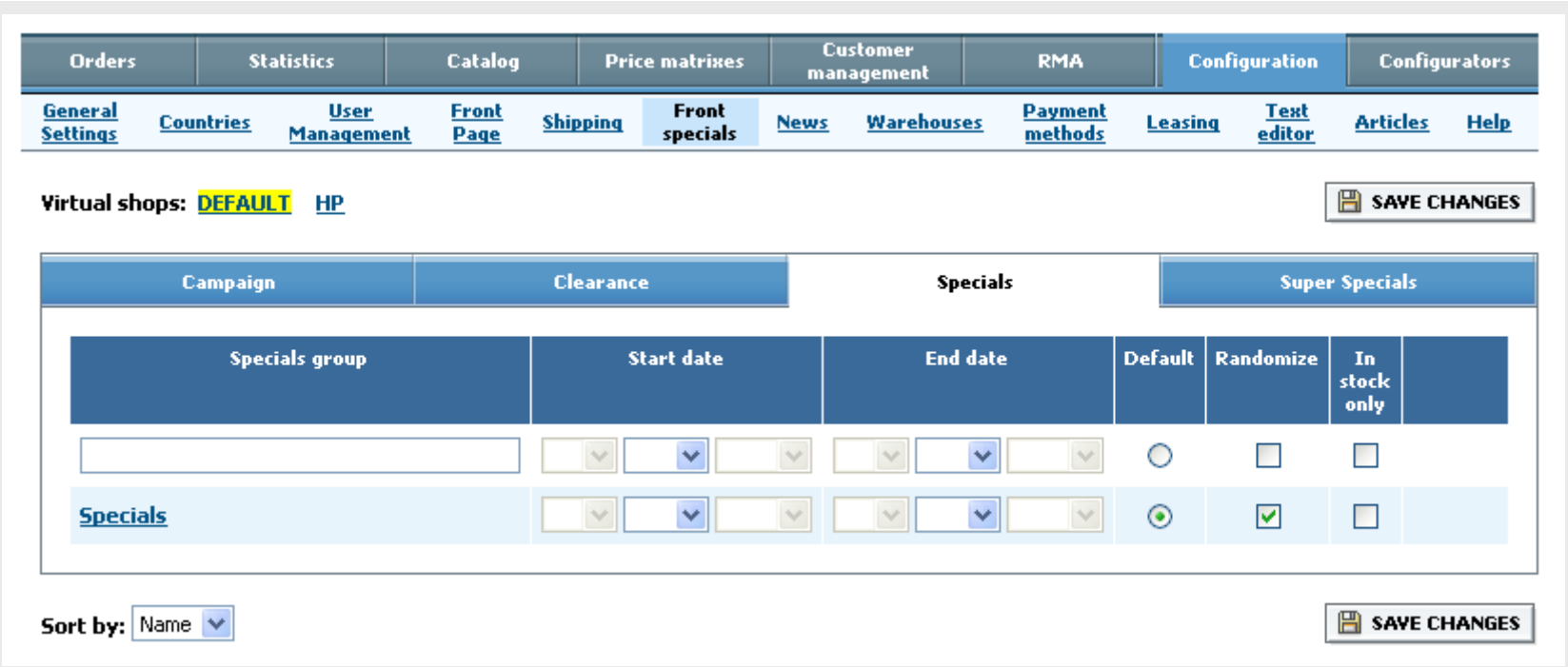
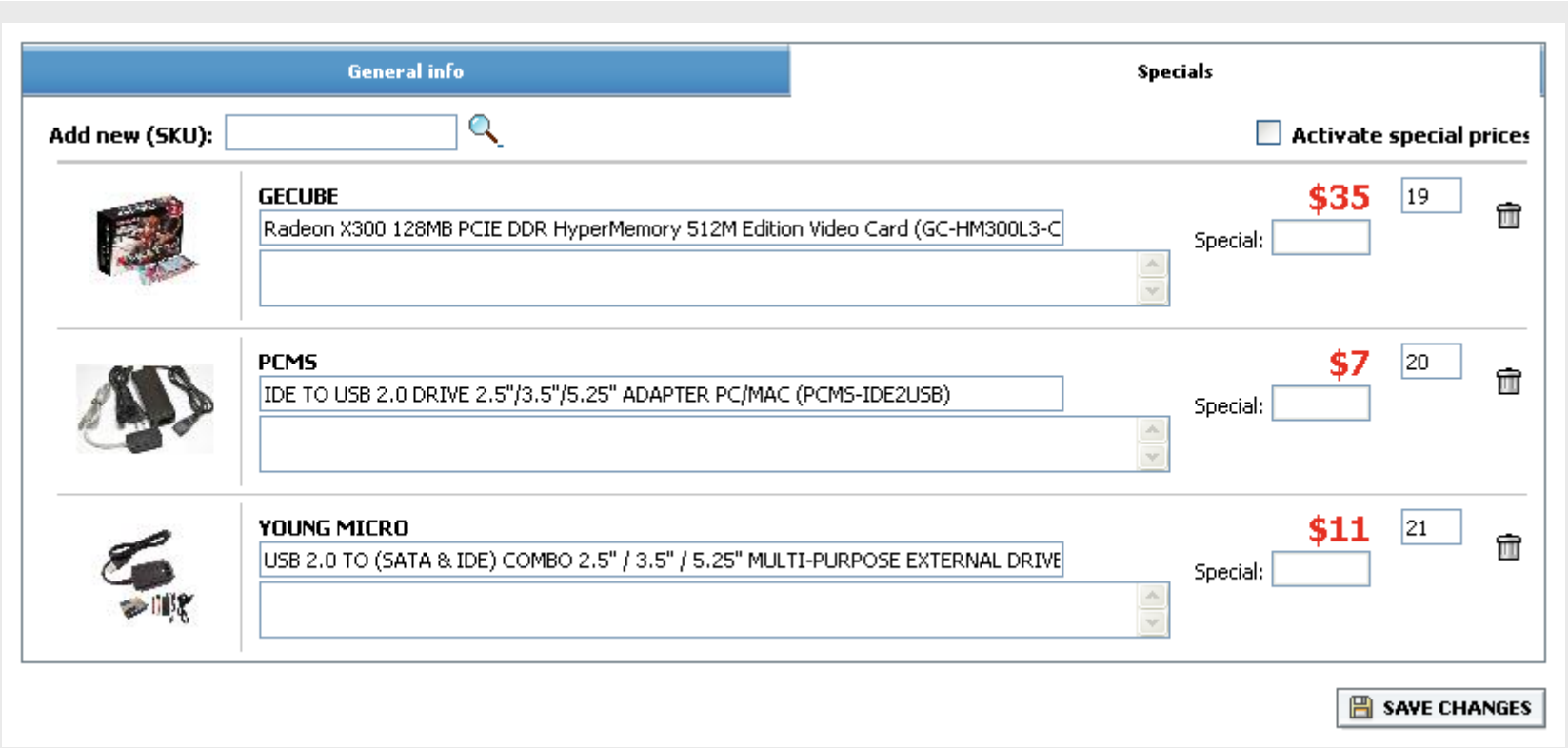
Configuration/Front specials is the interface for setting up product lists for campaigns, super specials, specials and clearance. The clearance section is often used for clearance products, hence the name, but can in reality be called anything in the frontend (bestsellers, recommended products, etc). Front specials can be assigned to individual customers, and given a start and end date. Campaigns can be shown in the frontend as lists of products, such as “recommended digital cameras”, “HP hot buys”, etc. How to display these lists can be adjusted according to your needs. For specials and super specials you may want to use the randomize and in-stock-only functions.



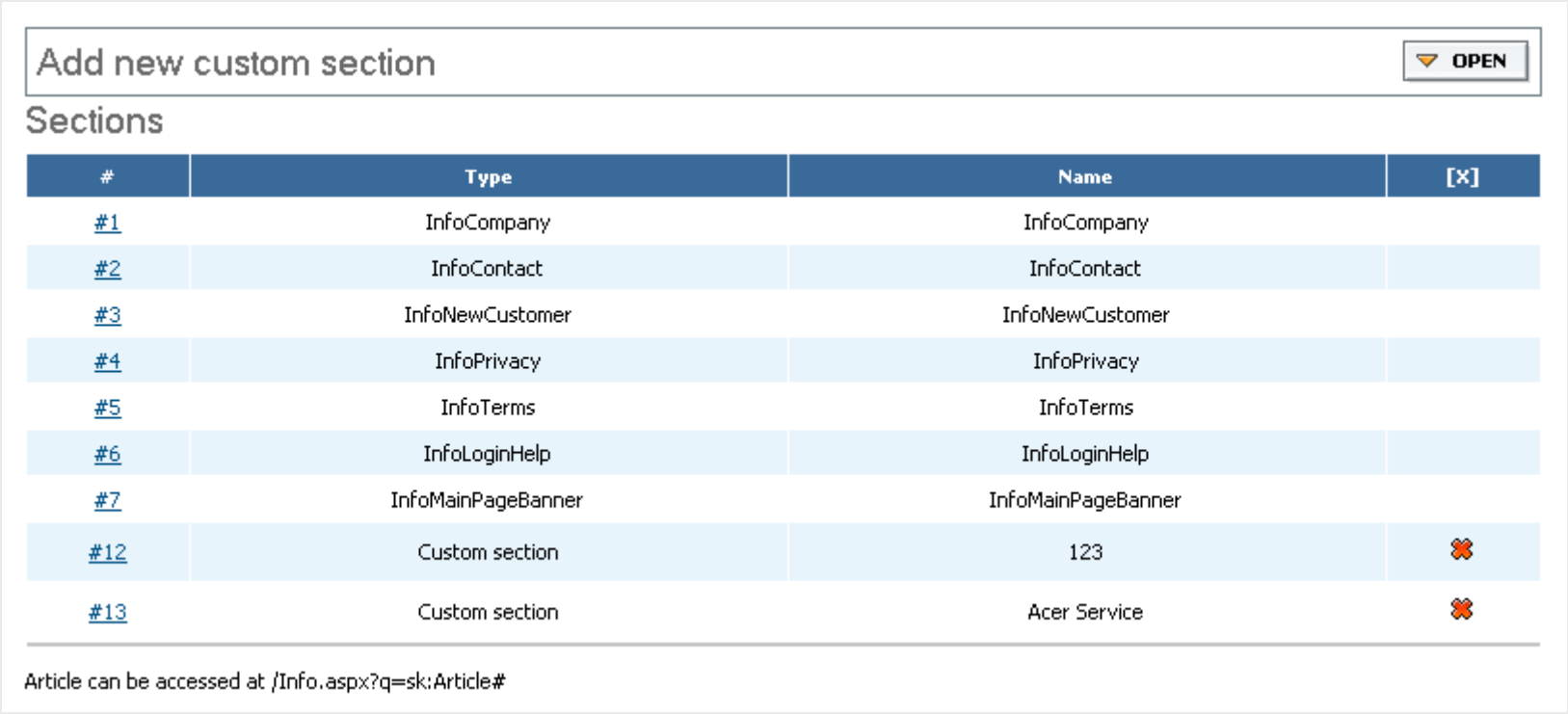
FRONTEND MODIFICATIONS

Adding or removing products to specials is done by clicking on the name to enter the details page. You can change the product name and add a promotional text (HTML). By checking Activate special prices you can set fixed prices for the products. The trashcan removes products, and if you don't use randomize, the order can be changed. Adding products is done by entering a manufacturer part number in the Add new field, and clicking on the icon. Multiple matches will be shown in a list. You can also add parts that are already in the buffer.



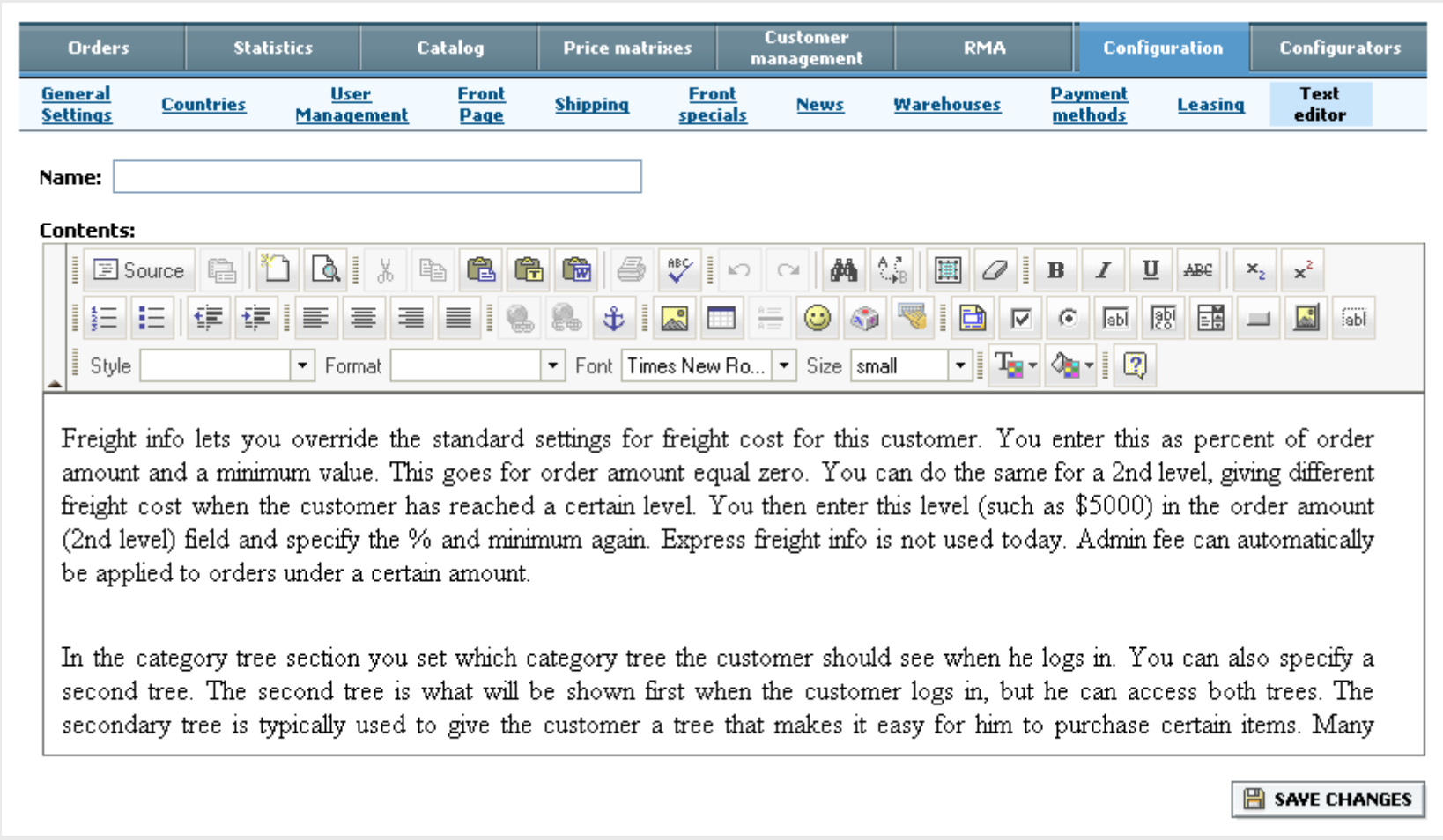
FRONTEND MODIFICATIONS

Configuration/Text editor lets you modify the standard texts, such as terms and conditions, company info, and also the banner and information spots.

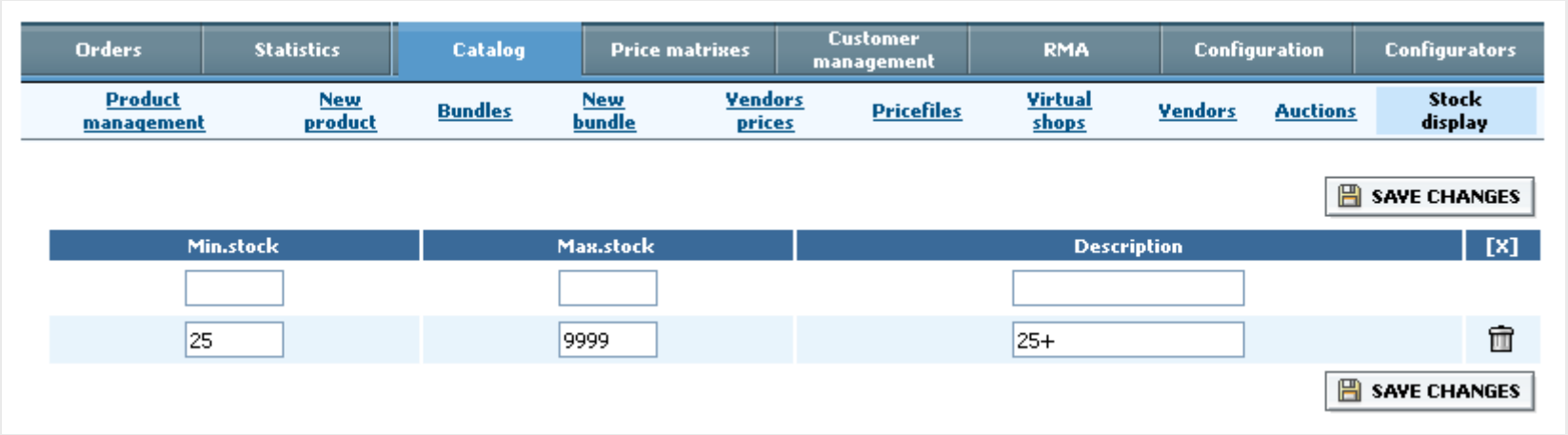


FRONTEND MODIFICATIONS

Clicking on the article number to the left brings you to the detail page. You can modify or add text and upload images using the HTML editor, or by clicking on Source, writing HTML code yourself.

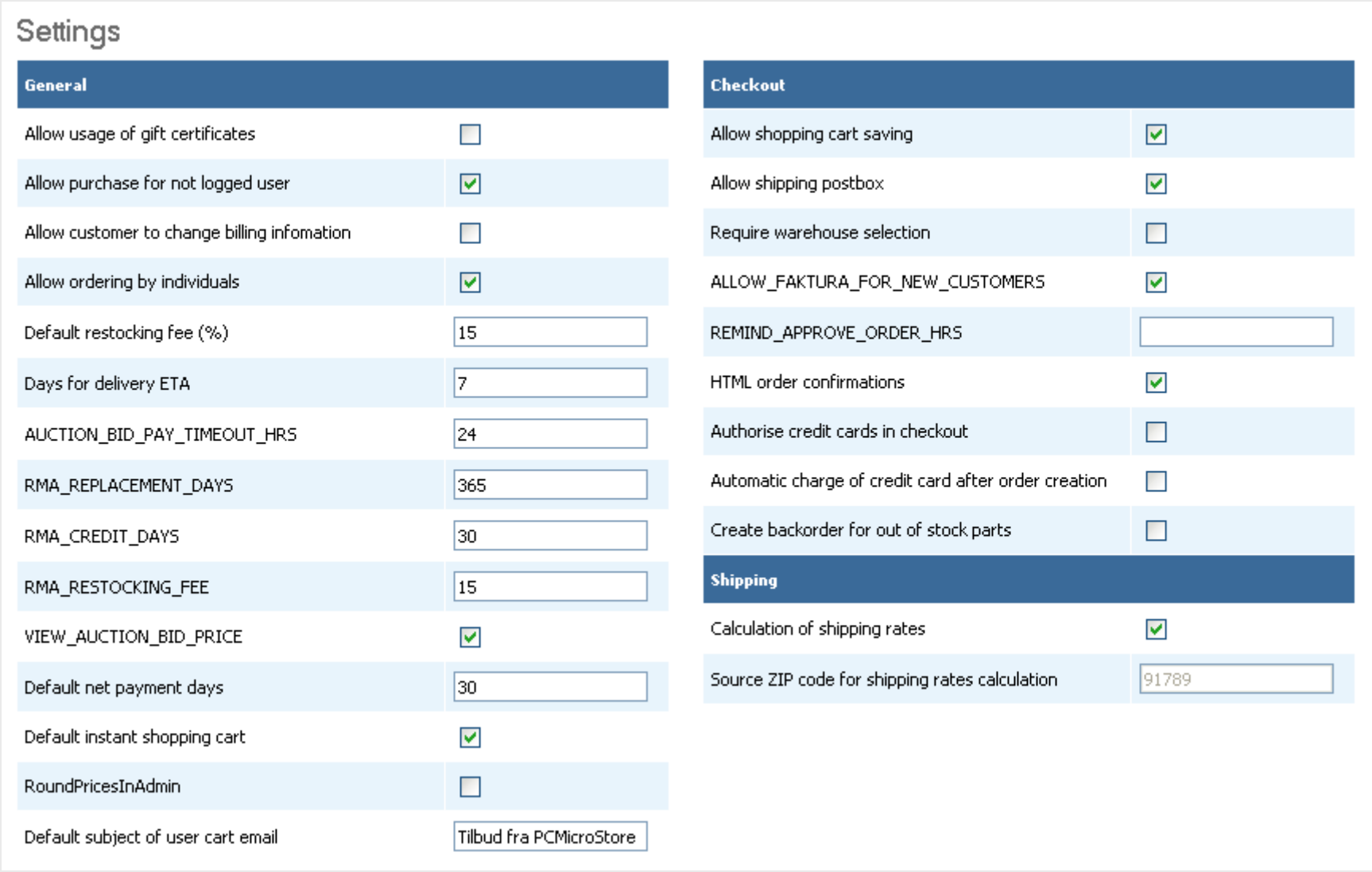


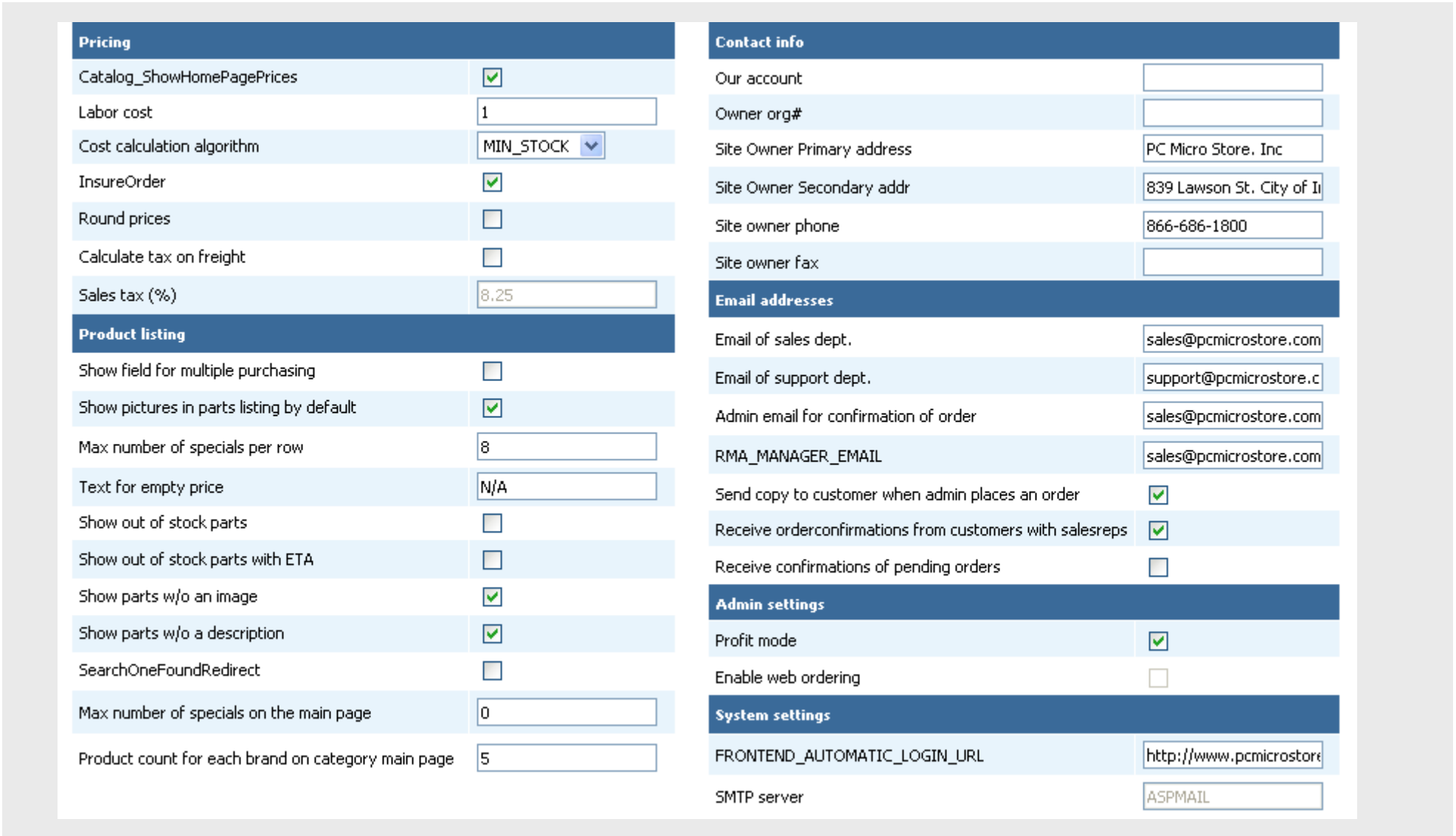
If you want to show stock differently, you can do so with Catalog/Stock display. Enter min and max stock levels and the text you want to show instead. Stock levels that are not included will be shown the way it is shown today. For instance, you can set minimum to 1 and maximum to 9, with a text of 1+, and min = 10 and max = 1000 with a text of 10+, and min = 0 and max = 0 and a text saying “special order”.



FRONTEND MODIFICATIONS

Configuration/General settings contain many settings that determine how the front looks like or behaves.





Pricing	
Catalog_ShowHomePagePrices	☑
Labor cost	1
Cost calculation algorithm	MIN_STOCK
InsureOrder	☑
Round prices	☐
Calculate tax on freight	☐
Sales tax (%)	8.25

Product listing	
Show field for multiple purchasing	☐
Show pictures in parts listing by default	☑
Max number of specials per row	8
Text for empty price	N/A
Show out of stock parts	☐
Show out of stock parts with ETA	☐
Show parts w/o an image	☑
Show parts w/o a description	☑
SearchOneFoundRedirect	☐
Max number of specials on the main page	0
Product count for each brand on category main page	5

Contact info	
Our account	
Owner org#	
Site Owner Primary address	PC Micro Store. Inc
Site Owner Secondary addr	839 Lawson St. City of I
Site owner phone	866-686-1800
Site owner fax	

Email addresses	
Email of sales dept.	sales@pcmicrostore.com
Email of support dept.	support@pcmicrostore.c
Admin email for confirmation of order	sales@pcmicrostore.com
RMA_MANAGER_EMAIL	sales@pcmicrostore.com
Send copy to customer when admin places an order	☑
Receive orderconfirmations from customers with salesreps	☑
Receive confirmations of pending orders	☐

Admin settings	
Profit mode	☑
Enable web ordering	☐

System settings	
FRONTEND_AUTOMATIC_LOGIN_URL	http://www.pcmicrostore
SMTP server	ASPMAIL

Allow gift certificates

Gift certificates, rebate codes and coupons are disabled by default. Activate if you want to use it.

Allow purchase for non-logged user

If this is not set, visitors will not see prices and buy buttons unless they are logged in.

Allow customers to change billing information

This is only for existing customers. New customers need to enter their billing information, of course (although you may have turned off sales to non-logged customers anyway). Most of our clients use this function to make sure that the billing address is the same address that they approved credit for.

Allow ordering by individuals/private orders

If you only sell to businesses; corporate/government, keep this one OFF.

Default instant shopping cart

Will show the shopping cart every time the customer buys a product. If it is off, the shopping cart is not shown. It is faster for the customer if he buys many things to not have to go to the shopping cart every time, but it can be confusing for new customers. The design of the shop should also be done so that the customer knows (easily notices) that he added something to the shopping cart. The customer can turn this on and off inside the shopping cart.

Catalog_ShowHomePagePrices

If you do not allow sales to non-logged customers you can enable prices on the frontpage so that everybody can see what your promotional prices are.

Cost calculation algorithm

There are six options. MIN_STOCK, AVG_STOCK, MAX_STOCK, MIN, MAX, AVG. This setting determines the cost price basis for the selling price. Many vendors can carry one product. If vendor A has it for 100 but doesn't have it in stock, vendor B has it for 105 and vendor C has it for 125, both with stock, the following would be true, shown as option(costprice): MIN(100), AVG(110), MAX(125), MIN_STOCK(105), AVG_STOCK(115), MAX_STOCK(125). Regardless of what you charge your customer you would probably buy the products from vendor B at the lowest price in stock, or even from vendor A, if the customer can wait.

Round prices

If this is not set, prices will be shown with two decimals.

Show pictures in part listing by default

The pages load faster if this is off, but speed is generally not a problem for the customers anymore. The customers can turns this on and off in frontend product listing anyway

Show out of stock parts

You will display parts that are out of stock in the frontend. Some customer prefer not to, but especially accessories will get removed if this is OFF.

Show out of stock parts with ETA

Should probably be ON, unless you want to make sure you only show products that that can be shipped the same day.

Show parts without image

Not all parts have images, but removing parts without image is a bad idea, since it's often accessories or newly added products that are missing images.
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Show parts without description

Like the previous one, should always be ON.

Max number of specials on the main page

If this is not set, we will always show all the products in ConfigurationFront specials/Specials on the main page. If you limit this to for instance 6, set specials to randomize, and add 30 parts to the specials list, you will get a main page that changes products all the time. We always fill up a complete row of products. If one row consists of 4 products, we show multiples of 4. If you have 7 products under specials, we will show only 4 of them.

Product count for each brand on category main page

If you mark specials brands on the category details page in Price matrices/Categories we will show a page with a certain number of parts for each special brand when you click on a category in the tree. The number of parts is specified in this option.

Calculation of shipping rates

If you want shipping rates to be determined by weight and zipcode instead of percent of purchase amount, set this option on. Please notify us so that we can upload the correct freight charge matrix for weight and zipcode according to how much you want to charge your customers.

Contact info and email address section

Enter your company information. Used in order confirmations and other user communication.

Profit mode

Makes it default that customer prices are calculated by dividing by (1-x%) instead of multiplying by (1+x%).

HP SPECIFIC FEATURES

HP Provisioner content

Complete product information, specs, images, and related accessories are uploaded directly from HP for virtually all HP products in the catalog.

HP category tree structure

HP products can be divided in the same category tree that HP splits their products in. This is much more detailed than our general catalog, but will obviously only work for HP products.

HP Sales tags / EZBuy

We have implemented the tracking routines required for EZBuy participation.

HP SmartChoice System configurator

Customers can configure their own HP computers directly on your website, and add them to the shopping cart together with the rest of their orders.

HP Channel Promotion

You can enable your site to automatically display promotional information, campaigns and special offers that HP provides. This ensures that you always promote the right products, and saves you time since your site will dynamically change by itself.

OTHER FEATURES

There is a lot of functionality that has been implemented for one or several of our clients that can be enabled and/or explained if necessary. Some of them are:

- Auctions
- System configurators
- Mobile phone and subscription configurators
- Gift certificates / rebate codes / coupons
- Statistics / reports
- Leasing
- Mailing lists
- Credit card payments
- Product returns
- Creation of pricefiles/banners for promotion
- Custom linking to accounting systems
- Virtual shops
- Wizards for accessories/memory/software
- More vendor catalogs