



Welcome To the Commerce Management Console

3.0.1 gives you a straightforward, commonsense way to manage your ecommerce site and ERP data integration. The Management Console is an Adobe Flex-based application that groups website data into pre-determined, yet flexible functionality, allowing non-programmers to maintain, edit and update the website.



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insite s of t w a r e Accessing the Management Console



A secure log-in is required to access the Commerce Management Console. The URL for your log-in page will be similar to: <u>https://yoursitename.com/console</u>. Your Project Manager will provide the exact link and initial administrator access.

Log In Page

	Commerce L	ogin		
	Username:	ConsoleUser1		
	Password:	****		
		Login		
				and the second
-		State of the second second		
			-	

s oftware Navigation



Main Menu

Modules are grouped into related sections in the left-hand, Main Menu:

Global Settings: Top level administration and set-up

- Global Management: Manage Customers, Products, Orders and more
- Website Settings: Custom, site-by-site settings
- Website Management: Update site-specific content
- Financial: Credit card transactions and payment profiles
- Tools: Batch processors and file management
- Reporting: Reporting Dashboard

Clicking on a Section will expand it, presenting all of the subsidiary menu options.

If you prefer to work with a larger screen view, you can collapse the Main Menu by clicking the left pointing arrow icon at the top of the menu panel. Once collapsed, the minimal menu contains navigation shortcuts to the most frequently accessed sections of the Management Console. Simply click the arrow again (now right pointing) to restore the complete menu display.

Shortcut	Goes To Page
USR	Users
CUS	Customers
PRO	Products
ORD	Orders
PMO	Promotions
EML	Emails
CAT	Categories
WPG	Web Pages
CPP	Credit Card
	Processing
BCH	Batch Processor
FLM	File Manager
DSH	Reporting
	Dashboard





Record management functions on all pages are controlled by the contextual Top Button Bar. These universal controls allow you to make and save changes, always within the context of the page you are on at any given time.

1 🧭	$+ \times \nabla \nabla \wedge \otimes$
Button Name	Description
Accept Changes	Saves all additions, deletions and edits that have been made to the active page
Cancel Changes	Cancels all edits made to the record you are currently on. If changes are pending on subsidiary records, cancel will revert all the way up the chain, returning you to the un-modified parent record
Add New	Creates a new, top-level record for manual entry
Mark To Delete	Flags a particular record to be deleted. The deletion is executed upon clicking Accept Changes
Filter	Allows you to narrow sets of records to a select group. Please see the detailed section on filtering below.
Import from Excel	Uploads an Excel spreadsheet to the page you are on, allowing mass additions and updates of records
Export to Excel	Creates an Excel spreadsheet of your current data set
Log Out	Logs the current user out of the Management Console, returning to the log-in page

Subsidiary Add/Delete Buttons

Some records will have subsidiary, dependant records or record sets (referred to as "Child" records). In these cases, adding or deleting a Child record is managed by use of the subsidiary Add/Delete buttons.

Details	Content	Categories	Cross-Sells	Specificati
Add	Delete			
	Name	Value	Sort Order	Acti





Records that have been modified in any way are flagged in the grid with the following small icons. Clicking the *Save* button in the Top Button Bar will execute all modifications. When a child record has been edited in any way, its parent record will be flagged as modified as well.

Icon Name	Description
New/Inserted	A new record that has been added to the data table
Deleted	Record has been flagged for deletion. Delete will execute when Save is clicked on the top button
	bar
Modified	Record has been edited
Cannot Save	Record has been edited, but changes cannot be saved as they have not passed required data
	validation. Please cancel or review and edit the changes

Page Options

Page Size

Pages that may contain large numbers of records are set to return the first 30 records on the first page. Use the arrow buttons to navigate through subsequent pages. You may change this default setting by typing an alternate number in the Page Size field and hitting *Enter*, however, the page size may not be set to greater than 1000 records. If you would prefer to work with the entire data set, if less than 1000, simply click the *Get All* button.

Page Size:	200	<	Get All	>	1 - 200 of 1114
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Page View Types

There are three styles of detail pages: Forms, Grids and Split. Form and Grid pages are fixed, while Split pages allow three different viewing options: Grid view, Form view or Split view. Click the arrow at the upper right of the page to change the page view, or click and drag the vertical splitter at any time to rearrange the split. View preferences are associated with each Management Console User. All changes will be saved and displayed as defaults upon subsequent log-ins.

Grid View

Part	Short Description	ERP Number	Active	Deactivation Date
Product Four	Product Four	456	01/26/2009	
Product One	Product One	1	01/23/2009	09/26/2009
Product Three	Product Three	3	01/22/2009	
Product Two	Product Two	23	01/22/2009	



0

Form View

Details	Content	Categories	Cross-Sells	Specifications	Custom Properties	Inventory	Restrictions	Shipping	Subscriptions	
Refrest	h From ERP	Copy Produc	t							
	Part 🌸	Product Four] ERP Managed					
Short D	escription 🜸	Product Four			Out of Stock					
ERI	P Number	456] Gift Card					
ERP D	escription	PF 28791			Allow Any Gift Card Amount					
	luct Code			_	Use Vendor Markup					

Split View

Page Size: 200 Get All 1 - 4 of 4 Deta... Cont... Cate... Cros... Spec... Cust... Inve... Rest... ! Short Descript... ERP Number Dea Active Part Product Four Product Four 456 01/26/2009 Refresh From ERP Copy Product 01/23/2009 09/2 Product One Product One 1 Product Three Product Three 3 01/22/2009 Part 🔹 Product Four ERP Managed Product Two Product Two 23 01/22/2009 Out of Stock Short Description * Product Four 🔄 Gift Card ERP Number 456 ERP Description PF 28791 Allow Any Gift Card A Product Code Use Vendor Markup Model Number Vendor Please select Vendo SKU Price Code UPC Tax Code 1 Sort Order 0 Tax Code 2





Just like page view preferences, data grid order can be re-arranged and saved per Management Console User. The number and data selections of columns themselves may be controlled in the Application Dictionary per implementation or by a System Administrator.

Rearranging Grid Columns

Grid columns can be re-ordered by using a simple click and drag. Click on a column header and drag it to the order you prefer. When in re-ordering mode, both the column selected and the column title will be highlighted.

Product Four Product Four 456 01/26/2009 Product One Product One 1 01/23/2009 09/26/2009 Product Three Product Three 3 01/22/2009 01/22/2009	Product One Product One 1 01/23/2009 09/26/2009
Product Three 3 01/22/2009	Product Three Product Three 3 01/22/2009
Product Two Product Two 23 01/22/2009	Product Two Product Two 23 01/22/2009

Sorting Grid Columns

All columns can be hot-sorted (high - low or low - high), simply by clicking the header. Multi-level sorting is also available. When moused over, column headers will display the sort-level options available to the right of the column name.

Object Name	1 1	Field Name	2 🛦	Description	3 🔺
Promotion		Active		Activation Date~	
Promotion		Deactivate		Deactivation Date~	
Promotion		Description		Description~	
Promotion		DiscountAmount		Discount Amount~	





Filtering allows you to narrow a large data set to just the selected records you want to see and work with. Clicking the filter button once turns on the filtering environment, so you can enter single or multiple variables. Clicking it again will execute the filter. When you begin entering your filtering parameters, the Filter icon will change color, from blue to orange. You also know you're in filter mode when all fields are blank. Any field that can be filtered on will be highlighted when clicked.

∇	
U	Inactive

Active

The following values can be used to define your filter:

Value	Description
*	Wild Card: Can be used to narrow results at the beginning, middle or end of a filter set
=	Equal To
>	Greater Than
>=	Greater Than OR Equal To
<	Less Than
<=	Less Than OR Equal To

Filters can be cleared by re-engaging the filtering environment, right-clicking, and selecting "Clear Selected Filter" or "Clear All Filters"

ALC: ALKING ST	a state and the second state	
Object Name	* cuscomer"	Clear Selected Filter
Field Name	*	Clear All Filters

*Please note: Pages that are grid only, such as the Application Settings, cannot be Filtered.





Global Settings

Websites

The Websites section maintains the top-level site details, such as the URL, design specific tags and templates, ERP integration settings and the default company information for your site(s) are maintained here. Please note that any changes can result in "breaking" the design of your site(s).

Global Settings>Websites:Website Details

Global Settings	Name Description Website Details Company Information Template				
Websites	Acme Commerce Active Site Name Acme Commerce Active				
C Roles	Description * Acme Commerce Order Number Prefix W				
Application Messages Application Settings	Domain Name Acme.com Order Number Format 000000				
	Host Company AcmeCommerce Customer Number Prefix WEB				
Countries	ERP Service URL Customer Number Format 000000				
Carriers	ERP Service Timeout 18000000				
Payment Terms					
Taxes	Tax Free Tax Code MN Tax Amount 0				
Tax Exemptions	Tax Calculation None V				
	Default Ship Site Minneapolis				
	Handling Amount 0				
	Handling Calculation None 💌				
Field Name	Description				
Site Name	Website name. Will display in site selector dropdown on Management Console for				
	multi-site implementations				
Description	Short, optional description of website				
Domain Name	Registered domain name				
Host Company	Optional descriptor of domain holder				
ERP Service URL	The path for Commerce to call when communicating with the ERP				
ERP Service Timeout	Length of time for ERP calls to be attempted				
Tax Free Tax Code	Optional default setting, if a code is required to flag customers as tax free				
Tax Amount	Top-level tax amount that may be applied to all products				
Tax Calculation	Select from: Dollar, Percent or Calculate				
Default Ship Site	Optional, default ship-from location				
Handling Amount	Top-level handling amount that may be applied to all products				
Handling Calculation	Select from: Dollar or Percent				
Active	Marks the selected website as active				
Order Number Prefix	Optional prefix, used to distinguish web orders in the ERP				
Order Number Format	Specified style that web order numbers are to be in				
Customer Number	Optional prefix, used to distinguish web customers in the ERP				
Prefix					
Customer Number	Specified style that web customer numbers are to be in				
Format					





Global Settings>Websites:Company Information

	0	Name	Description		Website Details	Company Information	Template
Global Settings		Acme Commerce	Acme Commerce	-	Company Name	Acme Retail	
Roles							
Application Messages					Address	5038 Westgate Street	
Application Settings					City	Minneapolis	
HTML Redirects					State	MN	
Countries					Zip	55410	
C) States					Country label	USA	
Carriers					Phone	612-822-1945	
Taxes					Fax	612-822-6598	
Local Tax Rates							
Tax Exemptions					Toll Free Phone	800-555-1234	
Field Name	Description	1					
Company	Company running both Commerce and the Management Console						
Name		C		C			
Address	Primary street address						
City	City of Company. May be used for shipping rating calculations						
State	State of Company. May be used for shipping rating calculations						
Zip/Postal	Zip/Postal Code of Company. May be used for shipping rating calculations						
Code		1					
Country	Country of Company. May be used for shipping rating calculations						
Phone		ephone number	1		<u> </u>		
Fax	Primary fax						
Foll Free		elephone numb	er				
		r					





Global Settings>Websites: Template

•	Name Description Website Details Company Information Template
Global Settings	Acme Commerce Acme Commerce
Coles	Title EpicorCommerce
Application Messages	Style Sheet
Application Settings	Body Style
HTML Redirects Countries	Java Script Opening Page Tags
C States	Operating rage rags
Carriers	
Payment Terms	
Local Tax Rates	Closing Page Tags
Tax Exemptions	
	Header Content
	Terms of Use
Global Management	Top Content Discourse Show Top Content
Website Settings	
Field Name	Description
Title	Top browser page display
Style Sheet	Optional website styling control
Body Style	Optional styling control for the body of the website
Java Script	Optional website javascript reference for entire website
Opening Page Tags	Optional HTML tag wrapper
Closing Page Tags	Optional HTML tag wrapper
Header Content Terms of Use	Optional data field for HTML-head
	Optional method of displaying website terms, rather than via Web Page Contents
Top Content:Show	If checked, flags related content area to be displayed on website
Top Content Area	Optional field if HTML is being controlled from the database
Left Content:Show	If checked, flags related content area to be displayed on website
Left Content Area	Optional field if HTML is being controlled from the database
Right Content:Show	If checked, flags related content area to be displayed on website
Right Content Area	Optional field if HTML is being controlled from the database
Bottom	If checked, flags related content area to be displayed on website
Content:Show	
Bottom Content Area	Optional field if HTML is being controlled from the database





Roles are assigned to Users, defining the Users' access rights to the website and/or Management Console. Role rights are hard-coded, but multiple Roles can be assigned to any given User, creating hierarchically expanded rights as needed. Role definitions may vary somewhat per implementation, and not all Roles will be used for every site. User records may also be created without assigned Roles (nulls), for implementations where Role-driven functionality is not required.

Global Settings>Roles

Global Settings			
Websites	Role Name		
🔲 Roles	ISC_Admin		
Application Messages	ISC_Customer		
Application Settings	ISC_Dealer		
HTML Redirects	ISC_SalesRep		
Countries	ISC_System		
C States	ISC_User		
Carriers			
Payment Terms			
🔻 🗁 Taxes			
Local Tax Rates			
Tax Exemptions			
Role Name	Description		
ISC_Admin	Administrative access to website and Management Console, with the rights to modify Customers, Products, Web Pages and content. Content Manager		
ISC_Customer	May be used to identify secured access to website. Site customer with an online account requiring username and password		
ISC_Dealer	May be used to secure Dealer access to website		
ISC_DealerManager	May be used to secure Dealer access to website. May have access to records of		
- 0	related, subsidiary Dealers		
ISC_SalesRep	May be used to secure Sales Representative access to website and to assigned		
- 1	Customer records and orders.		
ISC_SalesRepManager			
- 1 0	records of related, subsidiary Sales Representatives		
ISC_System	High-level administrative access to Management Console, with the rights to modify		
_ ,	critical site settings		
ISC_User	May be used to identify secured access to Management Console, with the rights to		
	modify Customers, Users and Orders. Typically a Customer Service type function		





Application Messages are the text that appears or pops-up on your website as the result of a shopper's action. These include messages such as: Confirmation of successful order submissions or an error message telling shoppers when they have used an invalid promotion code. This data can be maintained manually in the Management Console, or via an Excel import.

Global Settings>Application Messages

	Page Size: 200 Get All 1 - 11 of 11				
Global Settings	Message Name	Application Message			
Roles	ChangePasswordSuccess	Your password has been changed.			
Application Messages	ContactUs_EmailTitle	Application Message named ContactUs_EmailTitle			
Application Settings	ContactUs_MessageSent	Application Message named ContactUs_MessageSent			
HTML Redirects	ContinueAsGuest	You may also choose to not create an account and continue as guest.			
Countries	InvalidPromoCodeErrorMessage	Invalid promotion code.			
States	OrderConfirmationEmailMessage	Your Order was successfully placed.			
Carriers	OrderConfirmationMessage	Your Order was successfully placed.			
Payment Terms	PasswordChangeFailure	Password change failed. Please check your current password.			
Field Name	Description				
Message Name	Internal reference name. May be referenced in critical site coding				
Value	Detailed copy that will display to website users				

Application Settings

The Management Console has several **Application Settings** that manage various aspects of site functionality and ERP integration. These settings control the vital code values, function rules and ERP communication for your website, so access is generally restricted.

Global Settings>Application Settings

Global Settings	Application Description	1 A Setting V.	Value Setting Description			
Roles	ERP_ShipmentRefreshOrderOnShipmentRefresh	false	If true customer orders associated with refreshed shipments will also be refreshed			
Application Messages	ERP_ShipmentRefreshSendsConfirmations	false				
Application Settings	ERP_StaticCustomerNumber	WEBSTATIC	The Customer Number for the 'static' customer			
HTML Redirects	ERP_SubmitOrders	true				
Countries	ERP_System	InSite				
C States	ERP_TrackInventory	true	Do we track inventory from the ERP?			
Carriers	ERP_UpdateInvoices	false				
Payment Terms	ERP_UseStaticCustomer	false	Use a 'static' customer for orders in the ERP?			
'ield Name	Description					
pplication	Internal reference. Ofte	en referenced in critica	al site coding			
escription			-			
etting Value	Value paired with App	Value paired with Application Description to control the Commerce application(s)				
etting Descript	ion Describes the setting, v	what it is used for, and	where it is referenced in the website,			
_	management console, a	management console, and/or ERP Integration				





The **HTML Redirects** table allows each page of an old website to be mapped to an equivalent page in a new site, ensuring previous customers using bookmarks or old indexing will be directed to the current website. This data can be maintained manually in the Management Console, or via an Excel import.

Global Settings>HTML Redirects

	Page Size: 200 Get All 1 - 1 of 1		
Global Settings		New URL	
Websites	oldURLOct8test.com	NewURLOct8test.com	
Application Messages			
Application Settings			
HTML Redirects			
Field	Description		
	Description		
Name			
Old URL	Specific page from old website, which traffic should be redin	ected from. Note: PHP URLs cannot	
	be redirected via the HTML Redirect table		
New URL	Specific page on new site that traffic should be redirected to		

Countries/States

These are the **Countries**, **States** and **Provinces** that your websites may service. Specific locations are assigned to each website via Site Settings. State-level taxes are also managed in this area. This information may be setup manually in the Management Console or via an Excel import.

Global Settings>Countries

Global Settings							
🗋 Websites		Name	Abbreviation	Active	ISO Number	ISO Code 2	ISO Code
Roles		Australia	Australia	\checkmark	11		
Application Messages	×	Canada	CANADA		4		
Application Settings		Canada	CAN		120	CA	CAN
HTML Redirects		China	China	\checkmark	6		
Countries		France	France	\checkmark	12	FR	
States		Germany	Germany		8		

Field Name	Description			
Name	Country name			
Abbreviation	Official International Standard for Organization country abbreviation. Should match any ERP or			
	rating service coding			
Active	Indicates an active Country, serviced by company. Later Site Settings may indicate billing and			
	shipping preferences			
ISO Number	Official International Standard for Organization 3 digit numerical code. May be used for further			
	customizations and/or shipping determinations. Should match any ERP or rating service coding			
ISO Code 2	Official International Standard for Organization 2 character code. May be used for further			
	customizations and/or shipping determinations. Should match any ERP or rating service coding			
ISO Code 3	Official International Standard for Organization 3 character code. May be used for further			
	customizations and/or shipping determinations. Should match any ERP or rating service coding			

Global Settings>States

s o f t w a r e



•	Page Size:	200 Get All 1	62 of 62						
Global Settings	1.7	Name	Abbreviation	Tax Code	Tax Rate	Taxable	Tax Freight	Handling Amount	Active
Websites Roles	AI	abama	AL	OT-NT	4	Taxable	Tax Treight	0	Acti¥e ✓
Application Messages	AI	berta	AB		0			0	~
Application Settings	Ar	rizona	AZ	OT-NT	5.6			0	\checkmark
HTML Redirects	1.6.3	rkansas	AR	OT-NT	0			0	\checkmark
Countries		itish Columbia	BC		0			0	~
States		alifornia	CA	OT-NT	7.25			0	
Carriers		plorado	1.000	OT-NT	2.9			U	V
Field Name	D	escriptio	n						
Name	St	State or Province name							
Abbreviation	O	Official International Standard for Organization 2 character code							
Tax Code	Co	Code for state-wide taxes							
Tax Rate	Pe	ercentage	for state-wid	e tax calcula	ation				
Taxable	If	checked,	indicates that	t State is sul	oject to state-	wide tax			
Tax Freight	If	checked,	indicates that	t freight cha	rges are to be	e included in	tax calcul	lations	
Handling		Dollar amount for state-specific, additional handling amount. Often used for AK, HI & PR							
Amount	su	surcharges							
Active	In	dicates ar	n active State	, serviced by	y company. L	Later Site Set	tings may	indicate billin	ig and
			eferences	· -			<i>c</i> ,		C





Shipping **Carriers** such as UPS and Federal Express, with their many service options and codes are managed in this section. This is where you can control the method and amount of freight charges passed on to your customers, such as flat fee, percentage of order or fully-rated with your integrated carrier(s). This data is frequently not included in an ERP, and can be maintained manually in the Management Console or via an Excel import. (Please see the Carrier Rule Index for more information)

Global Settings>Carriers:Details

	Page Size: 200 Get All 1 - 2 of 2
Global Settings	Name Description E Details Packages Services Rules Charges Zones
Websites	FedEx FedEx
Application Messages	UPS UPS III Enable
Application Settings	Name * FedEx
HTML Redirects	Description
Countries	Contact Name Edward Morgan
Carriers	Contact Phone 612-822-1964
Payment Terms	Contact Email timm@insitesoft.com
Taxes	Live URL groupinsite.com
Tax Exemptions	
	Note: Meter Number, Password and Access Key fields must be updated for Live Rating
	Test URL groupinsite.com
	Calculation Type * Flat Fee
	Account Number XJ456
	Meter Number
	Password *****
	Access Key q5
	Image /Images/NotFound.jpg Upload Preview
Field Name	Description
Enable	Activates Carrier as an option once it is later assigned to your website. May be used to
	determine website checkout options
Name	Carrier name. Required
Description	Optional Carrier description. May be used to determine website checkout options
Contact Name	Primary contact, service or technical account representative, at Carrier
Contact Phone	Telephone number for Carrier Contact
Contact Email	Email address for Carrier Contact
Live URL	URL used for web services for live rating estimate calculations
Live	Directs web services to live instead of test URL for rating estimates
Test URL	URL used for web services for test rating estimate calculations
Calculation	Way in which freight charges are to be calculated. Choose from: None, Flat Fee, Percentage
Туре	Package Rated
Account	Account number for ship-from location
Number	
Meter Number	Client specific meter number used for online ratings
Password	Password to access web services for online rating
Access Key	Key to access web services for online rating
Image	Path for Carrier branded image if incorporated in website design





UploadOpens Windows Explorer browser to select an image to add to the File Manager/ServerPreviewOpens preview pop-up of Carrier image

Global Settings>Carriers:Packages

Details	ackages Services Rul	es Charges Z	ones						
Add De	lete								
	Name	Length	Width	Height	Max Weight	Active			
Large	Shipper	24	12	12	20	V			
	Γ								
eld Name	Description								
dd	Creates a new defaul	t package, assig	gned to the sele	ected Carrier					
elete	Deletes a selected de	fault package							
ame	Name or description	of the default p	ackage						
ength	Package length, in in		0	lculation					
'idth	Package width, in inc		0						
eight	Package length, in inches, to be used for rating calculation								
ax	Maximum weight default package can hold, in pounds, to be used for rating calculation								
eight	maximum weight detualt puckage can note, in pounds, to be used for futing encountrion								
ctive	Activates package, so it will be used for rating calculation on applicable orders								



Global Settings>Carriers: Services>Service Details

Page	Size: 200 Get a	All 1 - 2 of 2	2													
	Name	Description	on	E	ſ	Detai	ls I	Packag	jes !	Services	Ru	les	Charges	Zones	Ĩ	
	FedEx	FedEx														
	UPS	UPS				Add	D	elete	J							
							C	5	D	E	T	Servi	ice Details	Rules	Rates	Additional Charges
							FedEx	F1	FedEx	FEDX	1					
						ľ E	FedE×	F2	FedEx	FEDX				Enable		
														Is Defa	ault	
													Ship Code	F1		
												ERF	P Ship Code	FEDX		
													Description	FedEx Ov	ernight	
										-		Char	rge Amount	100		
														Note: Per	Calculation ty	/pe. % of order or % of returned rate.
													Flat Fee	50		_
												М	1inimum Fee	0		
													Active	10/09/200	19	
													Deactivate			
														Allow 9	Scheduled Sh	ipDate
Fie	ld Name		Desc	ripti	on											
Ena	able		-						-	-		d b	y the se	lected	Carrier	. May be used to
			deter	mine	we	ebsit	e ch	lecko	out of	ptions						
Is I	Default		Prim	ary s	erv	ice f	or se	elect	ed Ca	arrier.	Mag	y be	e used to	o deter	mine w	ebsite checkout

Is Default	Primary service for selected Carrier. May be used to determine website checkout
	display options
Ship Code	Carrier specific code for the service. Required for rating
ERP Ship Code	Service code as used in ERP, if different from Carrier's code
Description	Description of service, a.k.a. Ship Via. May be used to determine website checkout
	display options
Charge Amount	Percentage of order or percentage of rating to be charged, as determined by Carrier
	Calculation Type
Flat Fee	Flat dollar amount, if applicable, and as per Carrier Calculation Type
Minimum Fee	Minimum dollar amount to charge, if applicable, and as per Carrier Calculation Type
Active	Date upon which service will be available
Deactivation Date	Date upon which service will no longer be available
Allow Scheduled Ship	Flag used if site design allows customer specified ship dates
Date	



Condition



Global Settings>Carriers: Services>Service Rules

Name	Details Packages	Services	Rules	Charges	Zones				
Carrier Name test									
FedEx	Add Delete								
UPS	Fe F1 Fe	Service Deta	ils Rules	Rates	Additional Charges				
		Add De	lete						
				Rule Nan	ne	Execution Group	Execution Order	Condition	
		Ship	RuleOrderShipp	pingToZipCode		1	1	AND	
Field Name	Description	1							
Add	Adds a new	rule to	the spec	ified Ca	arrier Service				
Delete	Flags a sele	cted rule	e for del	etion					
Rule Name	Opens drop	Opens dropdown menu to select Service Rule							
Execution	Group num	Group number, allowing parenthetical rule constructs							
Group			01						
Execution Order	Order in wh	ich Rule	e is to be	e evalua	ated against a	n order			

Global Settings>Carriers: Services>Service Rates*

AND/OR, allowing multiple Rules per Service

Name	Details Packages Services Rules Charges Zones
Carrier Name test	
FedEx	Add Delete
UPS	Service Details Rules Rates Additional Charges Fe F1 Fe Add Delete
	Image: Charge Amount Per Each Image: Charge Amount Per Each
Field Name	Description
Add	Creates a new flat rate record
Delete	Flags a selected flat rate record for deletion
Order Amount	Maximum dollar amount of the order to which the rate may apply
Charge	Flat dollar amount of freight to charge per order amount
Amount	
Per Each	Flags rate as applying to each item on an order, as opposed to simply by total dollar amount

*Note: Used for Flat Rate Carrier Calculation Type only



Global Settings>Carriers: Services>Additional Charges

Name	Details	Packages	Services	Rules	Charges	Zones			
Carrier Name									
FedEx	Add	Delete							
UPS	Fe	e F1 Fe	Service Detai	ls Rule	es Rates	Additional Charges	l		
			[Nā	ame	Description		Charge	Enable
								ge	

Name	
Add	Creates a new Additional Charge record on the Service
Delete	Flags a selected record for deletion
Name	Name of fee. May be displayed during checkout, depending on website design
Description	Description of fee
Charge	Dollar amount to charge
Enable	Flags fee as active

Global Settings>Carriers:Rules~

Name	Details Packages Services Rules Charges Zones						
Carrier Name test							
FedEx	Add Delete						
UPS							
	Rule Name Execution Group Execution Order Condition						
Field Name	Description						
Add	Adds a new rule to the specified Carrier						
Delete	Flags a selected rule for deletion						
Rule Name	Opens dropdown menu to select Carrier Rule						
Execution	Group number, allowing parenthetical rule constructs						
Group							
Execution	Order in which Rule is to be evaluated against an order						
Order							
Condition	AND/OR, allowing multiple Rules per Carrier						

~Please see Carrier Rule Index



Enable



Global Settings>Carriers: Charges

Name	Details	Packages	Services	Rules	Charges	Zones								
Carrier Name te														
FedEx	Add	Delete												
UPS			Name			Description	Charge	Enable						
Field Name	Descript	tion												
Add	Creates a	a new Ac	lditiona	l Charg	ge reco	rd on the Carrie	er							
Delete	Flags a s	elected r	record for	or dele	tion									
Name	Name of fee. May be displayed during checkout, depending on website design													
Description	Descript	Description of fee												
Charge	Dollar a	mount to	charge				Dollar amount to charge							

Global Settings: Carriers>Zones: Zip Code Ranges

Flags fee as active

ZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddZip Code RangesZip Code RangesFlags a selected Zip/Postal Code Range for deletionDeleteZip Start RangeBeginning Zip/Postal Code for a range	Name	Details	Packages	Services	Rules	Charges	Zones			
FedEx Zone Zip Code Ranges Zone Rates Zone 1 Zone 2 Add Delete Zip Start Range Zip End Range Field Name Description Status Status Status Add Adds a new Zone record on the Carrier Delete Flags a selected Zone for deletion Delete Flags a selected Zone for deletion Zone Xame or description of Zone Zip Code Ranges Adds a new Zip/Postal Code Range, associated with the selected Zone Add Flags a selected Zip/Postal Code Range for deletion Zip Code Ranges Flags a selected Zip/Postal Code Range for deletion Zip Code Ranges Flags a selected Zip/Postal Code Range for deletion Delete Flags a selected Zip/Postal Code Range for deletion Delete Start Range Beginning Zip/Postal Code for a range	Carrier Name test									
Zone 1Zone 2Zone 2Zip Code RangesZone RatesAddDeleteField NameDescriptionAddAdds a new Zone record on the CarrierDeleteFlags a selected Zone for deletionZone 2Xame or description of ZoneZone 2Xame or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range	FedEx	Add	Delete							
Zone 1AddDeleteZone 2Zip Start RangeZip End RangeS54205542055425Field NameDescriptionAddAdds a new Zone record on the CarrierDeleteFlags a selected Zone for deletionZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range	UPS		τÊ	Zone			7in Code Banges	Zone Rates		
Zip Start RangeZip Start RangeZip End RangeField NameDescriptionAddAdds a new Zone record on the CarrierDeleteFlags a selected Zone for deletionZoneName or description of ZoneZip Code Ranges AddAdds a new Zip/Postal Code Range, associated with the selected ZoneZip Code Ranges DeleteFlags a selected Zip/Postal Code Range for deletionZip Code Ranges DeleteFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range			Zone 1	LOIL			Elp code Ranges	Lunchates		
Field NameDescriptionAddAdds a new Zone record on the CarrierDeleteFlags a selected Zone for deletionZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range			Zone 2				Add Delete			
Field NameDescriptionAddAdds a new Zone record on the CarrierDeleteFlags a selected Zone for deletionZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range							Zin Sta	rt Range	Zin End Range	
AddAdds a new Zone record on the CarrierDeleteFlags a selected Zone for deletionZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range						- 11		it Kange		
AddAdds a new Zone record on the CarrierDeleteFlags a selected Zone for deletionZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Code RangesFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range										
DeleteFlags a selected Zone for deletionZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddZip Code RangesZip Code RangesFlags a selected Zip/Postal Code Range for deletionDeleteZip Start RangeBeginning Zip/Postal Code for a range										
ZoneName or description of ZoneZip Code RangesAdds a new Zip/Postal Code Range, associated with the selected ZoneAddZip Code RangesZip Code RangesFlags a selected Zip/Postal Code Range for deletionDeleteZip Start RangeBeginning Zip/Postal Code for a range	Add		Adds a	new Zo	one reco	ord on	the Carrier			
Zip Code Ranges AddAdds a new Zip/Postal Code Range, associated with the selected ZoneAddZip Code Ranges DeleteFlags a selected Zip/Postal Code Range for deletionZip Start RangeBeginning Zip/Postal Code for a range	Delete		Flags a	selecte	d Zone	for del	letion			
Add Flags a selected Zip/Postal Code Range for deletion Delete Zip Start Range Beginning Zip/Postal Code for a range	Zone		Name	or descr	iption o	of Zone	e			
Add Flags a selected Zip/Postal Code Range for deletion Delete Zip Start Range Beginning Zip/Postal Code for a range	Zip Code Rang	es	Adds a	new Zi	p/Posta	ıl Code	e Range, asso	ociated w	vith the selected Zone	
Delete Zip Start Range Beginning Zip/Postal Code for a range	Add			-	-					
Delete Zip Start Range Beginning Zip/Postal Code for a range	Zip Code Rang	es	Flags a selected Zip/Postal Code Range for deletion							
	Delete				L		U			
Zip End Range Last Zip/Postal Code for a range	Zip Start Range	e	Beginn	ing Zip	/Postal	Code f	for a range			
Dip Dia Range Dust Dip/1 ostar code for a range	Zip End Range		Last Zi	Last Zip/Postal Code for a range						

*Note: Zip range imports from Excel must be formatted as text





Field Name	Description
Zone Rate Add	Adds a new Rate record to the selected Zip/Postal Code Range, per Zone
Zone Rate	Flags a selected Rate for deletion
Delete	
Weight	Maximum weight per package for selected Zip Code Range (within Zone), to which the Rate will apply
Rate	Dollar amount Rate for the selected package weight





This is where you can set the standard codes for the various payment options your company accepts.

Gobal Settings>Payment Terms

Global Settings	Page Size: 200 Get All 1 - 5 of 5				
Websites	Terms Code	Description	Is Credit Card	Active	Deactivate
Roles	CCard	Credi Card	✓	11/01/2009	02/05/2011
Application Messages	COD	COD		11/01/2009	11/02/2012
Application Settings	Net 10 Net 20	Net 10 Days		10/04/2005 09/04/2006	01/02/1900
HTML Redirects	Net 30	Net 20 Days Net 30 days		10/05/2009	01/03/1900 09/07/2012
Countries	100.00	10100 0000		10/00/2003	ostorizate
Carriers					
Payment Terms					
Field Name	Description		·	· · · · ·	·
Terms Code	ERP specific terms c	ode			
Description	General description	of payment term code			
Is Credit	Flags specific terms	as credit card based			
Card					
Active	Date at which code i	s active			
Deactivate	Date at which term v	vill no longer be active			

Taxes

Local tax rates (based on Zip/Postal Codes) are managed in this section. Tax exemptions for specific States, Postal Codes, Categories and Products are also managed here. (Note: Specific Customers that are tax exempt are managed via their customer record Tax Codes. State/Province based taxes are managed via Global Settings>States.)

Global Settings>Local Tax Rates

obal Settings Websites	Zip Code	Tax Code	Tax Rate	Tax Freigh
Roles 5541		MN	10	✓
Application Messages				
Application Settings				
HTML Redirects				
Countries				
States				
Carriers				
Payment Terms				
Taxes				
Local Tax Rates				
Tax Exemptions				

Field	Description
Name	
Zip Code	Postal code to which tax rate applies
Tax Code	ERP specific tax code
Tax Rate	Percentage of order to use in tax calculation
Tax Freight	If checked, indicates that freight/shipping charges are to be included in tax calculations



Global Settings>Tax Exemptions

sign Tax Exe	mpt States		Assign Ta	x Exempt Cat	egories			
õ		Search Available			Searc	h Available		
Exempt State	es	Available States	Exempt	Categories			Available Categor	ries
State	e	State		Category	Parent		Category	Parent
	Add	Alabama				Add		
		Alberta				Remove		
	Remo	re Arizona Arkansas						
		British Columbia						
ign Tax Exe	empt Zip Codes	California	Assign Ta	x Exempt Pro	oducts			
		Search Available				h Available		_
Exempt Zip C		Search Available	Exempt	Products	Searc	th Available	Available Product	
		Search Available Available Zip Codes Zip	Exempt			th Available	Available Product	5 Short Desc.
Exempt Zip C	iodes	Search Available	Exempt	Products	Searc	h Available		
Exempt Zip C	iodes	Search Available Available Zip Codes Zip 55410	Exempt	Products	Searc]		
Exempt Zip C	iodes	Search Available Available Zip Codes Zip 55410	Exempt	Products	Searc	Add		
Exempt Zip C	iodes	Search Available Available Zip Codes Zip 55410	Exempt	Products	Searc	Add		

Description						
rign Tax Exempt States						
Searches all available States. Uses an * for wildcard searching						
States exempt from general taxation						
Search results from Search Available function of States that may be marked as tax exempt						
Moves one or many Available States to the Tax Exempt States field and makes the						
association. Drag-and-Drop may also be used instead of the button.						
Removes one or many Tax Exempt State associations and sends them back to the Available						
States field. Drag-and-Drop may also be used instead of the button.						
rign Tax Exempt Zip Codes						
Searches all available Zip/Postal Codes. Uses an * for wildcard searching						
Specific zip codes that are exempt from general taxation						
Search results from Search Available function of Zip Codes that may be flagged as tax						
exempt						
Moves one or many Available Zip Codes to the Exempt Zip Codes field and makes the						
association. Drag-and-Drop may also be used instead of the button.						
Removes one or many Tax Exempt Zip Code associations and sends them back to the						



	Available Zip Codes field. Drag-and-Drop may also be used instead of the button.
By Product: Assi	ign Tax Exempt Categories
Search	Searches all available product Categories. Uses an * for wildcard searching
Available	
Exempt	Specific Categories that are exempt from general taxation
Categories	
Available	Search results from Search Available function of Categories that may be flagged as tax
Categories	exempt
Add	Moves one or many Available Categories to the Tax Exempt Categories field and makes the
	association. Drag-and-Drop may also be used instead of the button.
Remove	Removes one or many Tax Exempt Category associations and sends them back to the
	Available Categories field. Drag-and-Drop may also be used instead of the button.
By Product: Ass	ign Tax Exempt Products
Search	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for
Available	wildcard searching
Exempt	Specific Products that are exempt from general taxation
Products	
Available	Search results from Search Available function of Products that may be flagged as tax exempt
Products	
Add	Moves one or many Available Products to the Tax Exempt Products field and makes the
	association. Drag-and-Drop may also be used instead of the button.
Remove	Removes one or many Tax Exempt Product associations and sends them back to the
	Available Products field. Drag-and-Drop may also be used instead of the button.





Users

The **Users** section is the security hub for all website and Management Console users. Usernames, Passwords and Role assignments are maintained here. A new User is automatically created and associated with a customer whenever a new customer creates an order, they can be imported from your ERP system, or added manually. Custom Properties are available for implementation-specific, advanced features if needed.

Global Management> Us	sers: Details
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	Page Size: 30 < Get All > 1 - 30 of 82
Global Settings	Username First Name Last Na Details Customers Custom Properties
Global Management	Username First Name Last Na 31779b30-00ad-4734-'
Users	36aaf936-8246-4a7f-a Change Password Change Question/Answer Reset Password
Customers Products	390591b9-d745-4897-
Product Styles	3f6b6a74-192d-4af4-8
Advanced Filtering	42489d38-2800-4b8a- Username * andrews11@insitesoft.com
Orders	45ad8782-814e-4284 Phone Phone
Subscription Orders	563d59a2-f763-43d0-t Last Name Extension
Promotions	56f52543-4970-4953-£
🗋 Emails	5819d109-a1f4-443e-t Position Fax
Dealers	6220ba56-4a22-430f-a Company Email * andrews11@insitesoft.com
Sales Reps	670c3ef6-fdc7-4dea-9! Comments Language Code
Vendors	68705177-b3bf-48ac-E Email Opt-In Email Opt-In
	7000453-4950-4030-1 73614484-8dd9-4f21-9 Salesperson
	749a8ae6-791d-4b45-i
	7b56c08c-f1a9-41bc-a
	82c0e4be-8a28-4347-a Security
	8493b0c9-d787-4d77-4
	881e81f3-8a52-4978-∂
	8f5275a4-b834-42f4-8 Roles Edit Roles
	930/bab0-1/b3-46d2-9
	9b19f5a5-bb72-4b43-t Creation Date 11/19/2009 📰 Last Activity Date 11/19/2009
Field Name	Description
Security Function Bu	
Change Password	Pops up a window allowing old and new passwords to be entered and reset by Admin
Change	Pops up window allowing User's security confirmation question and answer to be reset
Question/Answer	by Admin. Requires custom security implementation on website.
Reset Password	Auto-generates a new password and email to the User
Personal Information	n Section
Username	The Username, along with Password, is used for logging in to the Management Console
	and/or a secured website. Usernames are often, but not always, email addresses.
First Name	The first name of the site or Management Console user.
Last Name	The last name of the site or Management Console user.
Position	If associated with a company, the user's job title.
Company	The user's associated company or business.
Comments	A free-form area for general notes about the specific user.
Phone	The user's telephone number.
Extension	The user's telephone extension
Fax	The user's fax number.
Email	The user's email address. Depending on implementation specifics, this may be the same
	as their Username.



The user's preferred language code. Generally a four-character code such as, "en-us."						
This is used to determine the field labels presented in the Management Console in multi-						
lingual implementations. The default value is "en-us," for United States English.						
If checked, indicates that a user has elected to receive subscription based emails.						
If the Salesperson Management Module is implemented, Users can be cross-referenced						
with their related Salesperson ID or code.						
If checked, indicates that the user is logged in to the website at the present time.						
Flag used for implementation specific security settings per user						
If checked, indicated that the user has made repeated, failed log-in attempts, and will no						
longer be allowed further attempts, without being manually over-ridden here.						
If checked, indicates that when the user submits an order, the order can join the ERP						
submission process, rather than being held for approval.						
If checked, indicates that the user has permission to change their password themselves,						
without oversight.						
User is allowed to view all orders tied to their associated Customers						
Assigned security Roles for website and/or Management Console						
Opens pop-up window with list of Roles that may be assigned or removed						
Date on which User was created, either by manual entry, upload, or through website order						
entry						
Date of User's last log-in to the website or Management Console						



Global Management> Users: Customers

	Page Size: 200 Get	All 1 - 35 of 35									
Global Settings		E	a .	Details	Customers	Custom Properties					
Global Management	Username	First Name Andy	L	Decemb	customers	customroperaes					
Users	andy@acme.com bil@smith.com	Tim	Vanx Smit	View	Go To		Search Available				
Customers	bstrojny@yahoo.com		SHIC	Assigned	I Customers				Available Customers		
Advanced Filtering	doug@acme.com	Doug	Hillb		ust Num	Seq	Name	1	Cust Num	Seq	Name
Orders	dzins@mac.com	Darwin	Zins	+	31	1	TEPPER BAR SUPPLY Morgan Ted		31	1	TEPPER BAR SUPPLY
Subscription Orders	EpicorAdmin	Epicor	Adm						31	2	MIKE MCCOREY And
Promotions	gail@acme.com	Gail	Stro						31	3	BREAD WINNER GO
🗋 Emails	greg@acme.com	Greg	Morg						31	4	MARIA'S ITALIAN KI
Dealers	harry@acme.com	Harry	Oun						31	5	THE GREENS Phillips
Sales Reps	importtest@october1	2. Import	Test						31	6	THE GREENS Groupe
🗋 Vendors	InSiteAdmin	InSite	Adm						31	7	SANSATION VILLAGE
	larry@acme.com	Larry	Umb						31	8	ELEPHANT BAR #12
	mary@acme.com	Mary	And						31	9	BAMBOO CLUB #200
	nancyb@insitesoft.co			I.					31	10	HENNESSEY'S TAVER
	october12	October	Man					Add	31	11	ROCK FISH Vendor 2
	October13	Manual	Entr					Remove	31	12	VENTURA COUNTY S
Go To	Customer. Direct nav	igation a	way	y fro	m Usei	rs, to the C	Customer recon	rd for t	he select	ted Assign	ed
	Customer.										
Search	Searches a	ll availal	ole (Cust	omer N	Jumbers S	Sequences and	Name	s Uses :	an * for wi	ldcard
		ii u vuiiu		Cubi		unioeis, i	sequences and	- i vaint			lacara
Available	searching										
Assigned	Customer(s) associ	ated	l wit	h the p	articular u	Iser				
Customers		,			г						
Available	Active Cus	stomers	that	may	be ass	igned to U	Jsers				
Customers											
Add	Moves one	e or man	v A	vaila	ble Cu	stomers to	the Assigned	Custo	mers fie	ld and mak	the
1100							0			ia ana mai	
							ed instead of the				
Remove	Removes of	one or m	any	Assi	igned (Customer a	associations ar	nd seno	ds them l	back to the	Available
			•		-		e used instead				
	Customers	nona. D	rug	unu	Propri	ing uibo t	e used mistedu	· JI UI	Junion		

Global Management> Users: Custom Properties*

Page Size: 200 Get All 1 - 35 of 35							
Global Settings		Lace Hill 1 55 61 55					
Global Management	Userna	ame First Name	L	Details Customers Custom Properties			
📑 Users	andy@acn	ne.com Andy	Vanc				
Customers	bill@smith.	.com Tim	Smit	Add Delete			
Products	bstrojny@	yahoo.com		Name	Value		
B Advanced Observes	doun@acn	ne.com Doug	Hillbr				
Add	Adds a new (Custom Pror	ertv R	ecord.			
Delete		1		erty for deletion. Delete will execute	e upon clicking the top Save		
Name	Name of the	individual c	ustom	property.			
Value	Property value	ue, used to d	rive cu	istomizations.			

*Exclusively used for customizations. May require implementation of advanced features.

s of t w a r e



Customer records are automatically created when orders are placed on your site, and are fully integrated with your ERP. **Customers** can also be pre-loaded and refreshed from your ERP.

Global Management>Customers: Details

8	Pag	e Size: 200	Get All 1 -	160 of :	160								
Global Settings		le numi	L dia ta	12.31	11	Details	Users	E	Billing	Assign Products	Shipping	Sales Reps	Custom Properties
Global Management		Customer	Ship To			Decum				- issign i routes	Subbuild	sucsiteps	customicoperates
Users		31	2	100	,	Refres	h From ERP						
Customers	_	31	3		F								
Products Advanced Filtering		31	4	1	r i	Custon	ner Informa	atio	n				
Orders		31	5			Custor	mer Number	*	31		Ship To 😽	1	
Subscription Orders		31	6	2		Ē	RP Number	* 1	123		1	Active	
Promotions		31	7	3	<u>.</u>				TEPPER BA			Send Email	
Emails		31	8	3	E		Company						
Dealers		31	9	1	E		First Name		ſed			Send Fax	
🗋 Sales Reps		31	10	1	Ł		Last Name	ſ	Morgan		Contact 1	TEST	
🗋 Vendors		31	11	9	F		Address 1	*	131 REDV	VOOD AVE	Contact 2		
		31	12	9	١		Address 2	Ē			Contact 3		
		31	13	1	ł		Address 3	Ē			Email		
		31	14	3	` II			÷			-		
		31	15		E		City	*	.OS ANGEL	LES	Fax		
		31	16	4	5 9		State	* (Ξ Α		Phone 1		
		31	17		ł	3	Postal Code	* 9	90066		Phone 2	213-821-0841	-12
		123000224	10				County	1			Phone 3		
		123000226					Country	*					
		123000228			1			1			-		
		123000230				-							
		123000232			1	Other I	nformation						
		123000234				End Us	ser Type				Customer Type		
Website Settings		123w12345				s	ales Rep	Se	lect Sale:	s Rep 🔹	Territory	0	
Website Management		213	0	3	ł.			Taxas I					
Financial		218	0	1	E	Site C	Company (Se	lect Com	pany 🔻			
Tools		666	0		1								
Field Name	Descript	ion											
Refresh from	Synchs th	ne individu	al Cust	ome	er r	ecord	data in	ı tl	he Ma	anagemen	t Consol	e with tha	t in your
ERP	ERP												
Customer Inform	ation												
Customer	Automati	cally assig	gned Cu	istor	ner	numt	ber. Cr	ea	ted ei	ither by El	RP and t	hen refres	hed, or by
Number	website.	Customer	number	for	mat	tting c	an be i	m	anage	ed via App			•
ERP Number	Customer	r's number	r in ERI	P, if	dif	ferent	from a	ab	ove				
Company	Company	for B2B	comme	rce.	Ma	ay also	be us	ed	for E	32C situat	ions (E.	G.: Consu	ner shipping
1 2		s their wor									,		11 0
First Name		e of prima		act a	and	l/or en	d-use o	cu	stom	er			
Last Name		e of prima											
Address 1		of address	-										
Address 2		ne of addr											
Address 3		e of addres											
	1												



30100001	
City	City for address
State	State/Province of address
Postal	Zip/Postal code of address
Code/Zip	
County	County of address. Optional
Country	Country of address
Ship	Indicates if the customer record is for their main/bill-to address (generally sequence 0) or a
To/Sequence	subsidiary or ship-to address (generally sequence 1 or greater)
Active	Indicates an active Customer record
Send Email	Flag for prompting automated email notifications
Send Fax	Flag for prompting automated faxed notifications
Contact 1	Optional additional contact field. Generally used for B2B scenarios where previous First/Last
	name fields are not used
Contact 2	Optional additional contact field. Generally used for B2B scenarios where previous First/Last
	name fields are not used
Contact 3	Optional additional contact field. Generally used for B2B scenarios where previous First/Last
	name fields are not used
Email	Primary email address for Customer
Fax	Primary Fax for Customer
Phone 1	Primary telephone number for Customer
Phone 2	Optional additional telephone number for Customer
Phone 3	Optional additional telephone number for Customer
Other	
Information	
End User Type	Customer coding field. Often used for reporting purposes
Sales Rep	Optional assigned Sales Representative name or code
Site Company	Optionally assigns Customer to specific site in multi-site implementations*
Customer Type	Optional customer coding field. Used for pricing or customizations
Territory	Optional coding field for territory restrictions*

*May require advanced features and/or integration customizations





Global Management>Customers: U	Users
--------------------------------	--------------

Deta	ails Users	Billing	Assign Pro	Juucts	Shipping	Sales Reps	Custom Pro	percies			
Vie	w Go To				Search Avai	lable					
Assig	ned Users						Available Users				
	User Name	Email	First Name	Last Na	me		User Name	Email	First Name	Last Name	1
+	andy@acme.		Andy	Vanders	8		andy@acme.coi		Andy	Vanders	
							bill@acme.com		Bill	Mc Harding	
							bill@smith.com		Tim	Smith	
							doug@acme.coi		Doug	Hillborrow	
							gail@acme.com		Gail	Strong	
							greg@acme.cor		Greg	Morgan	
							harry@acme.co		Harry	Oundurlus	
							InSiteAdmin	InSiteAdmin@gr	InSite	Admin	
					1	Add	larry@acme.cor		Larry	Umbuntu	
						Remove	mary@acme.coi		Mary	Anderson	
					3		pete@acme.cor		Pete	Formen	
							phil@acme.com		Phil	Longfellow	
							rzins@groupinsi	rzins@groupinsi	Редду	Zins	
							steve@acme.cc		Steve	Williams	
							steve@steve.co		Steve	Johnson	
							susan@acme.cc		Susan	Landers	
							ted@acme.com		Ted	Stevens	
							theo@acme.cor		Theo	Pendergrass	
	-						tim@acme.com		Tim	Morgan	
							yanabaespanol		Yanaba	Alfonso	
_							yol@acme.com		Yolanda	White	

Field Name	Description
View	Will pop-up a quick-view window displaying the User Details for the
	selected, Assigned User
Go To	Direct navigation away from Customers, to the User record for the
	selected Assigned User
Search Available	Searches all available Usernames, Emails, First and Last Names. Uses
	an * for wildcard searching
Assigned Users	Users associated with the particular Customer
Available Users	Active Users that may be assigned to Customers
Add	Moves one or many Available Users to the Assigned Users field and
	makes the association. Drag-and-Drop may also be used instead of the
	button
Remove	Removes one or many Assigned Users associations and sends them back
	to the Available Users field. Drag-and-Drop may also be used instead of
	the button



Global Management>Customers: Billing

Page Siz	e: 200 Get All	1 - 21 of 21		0
	Customer Num	Ship To	Details Users Billing Assign Products Shipping Sales Reps Custom Properties	
	31	1		
	31	2	Credit Hold	
	31	3	Price Code *	
	31	4		
	31	5	Bank Code *	
	31	6	Tax Code 1 N	
	31	7	Tax Code 2	
	31	8	Payment Terms * Net 30 V	
	31	9		
	31	10		
	31	11	Available Credit 0	
	31	12	Open Invoice Balance 0	
	31	13	Open Order Balance 0	
	31 31	14	Credit Limit 0	
	31	15	Currency N/A	
	31	17		
	31	18		
	213	0		
	218	0		
	ABANDONED CART	0		
•				
Field	Name		scription	
Credit	t Hold	Flag	gs Customer as being on hold. May be used to execute customized business rules	3
			arding order submission	
Price	Code	Cod	de used for pricing calculations	
Bank	Code		le used for cash receipts or G/L routing	
Tax C	Code 1	Cod	le for tax calculations	
Tax C	Code 2	Opt	tional code for tax calculations	
Paym	ent Terms		stomer's specific terms, such as Net 30, Credit Card, etc.	
	able Credit		comatically calculated. Credit limit minus Open Invoice Balance minus Open Ord	ler
			ance	
Onen	Invoice		lar total of all unpaid invoices	

Open involce	Donar total of an unpaid involces
Balance	
Open Order	Dollar total of all placed orders that have not yet shipped/invoiced
Balance	
Credit Limit	Dollar value of Customer's credit limit
Currency	Currency code if required





Global Management>Customers: Assign Products

	Page Size: 200	Get All 1 -	160 of 160							
Global Settings	A Guardian M	1		Details	Users Billing	g Assign Products	Shipping Sales Reps	Custom Properties		
Global Management	Customer	Ship To		Decails	USEIS Dilling	g Assign Froducts	Shipping Sales Keps	cuscom Propercies		
Users	31	2	_				(<u> </u>			
Customers	31	2	ſ	View	Go To		Search Available			
Products	31	4	1	Assigned	l Products				Available Products	
Advanced Filtering Orders	31	5		N	lame	Short	Desc.		Name	Short Desc.
Subscription Orders	31	6		+ в	BA10WB	Ski Boo	t, Black			Product Four Rev test
Promotions	31	7	5	1.0	BA11MB	Ski Bool			4600-1	Hinge, Manhead Assemb
Emails	31	8	E	+ B	BA11WB	Ski Bool	t, Blue		9-331-065-147	Housing Black
Dealers	31	9	E						ADD-200-5 BBA10WB	Machined Casting Ski Boot, Black
🗋 Sales Reps	31	10	F						BBA10WB BBA11MB	Ski Boot, Gray
Vendors	31	11	F						BBA11WB	Ski Boot, Blue
	31	12	A						BKH9456	Hauer Bike
	31	13							BKK7894	King L Bike
	31	14						Add	BK58945	Sutherland Bike
	31	16						Remove	CAT-300-SCR-S	Junction Plug
	31	17						Remove	DCD-100-SP	Frame Rail
F ield Name /iew	DescriptWill popProduct.		luick	-viev	w windo	ow display	ving the Proc	luct Details	s for the select	ted, Assigned
	Will pop Product. Direct na	-up a c	•				U		s for the select	
View	Will pop Product.	-up a c	•				U			
View	Will pop- Product. Direct na Product	-up a c	on av	vay f	from Cu	istomers, t	to the Produc	et record fo		Assigned
/iew Go To	Will pop- Product. Direct na Product	-up a c vigatio all ava	on av	vay f	from Cu	istomers, t	to the Produc	et record fo	or the selected	Assigned
Jiew Go To Search	Will pop Product. Direct na Product Searches wildcard	-up a c vigatio all ava search	on av ailabl	vay f le Pr	from Cu oduct N	istomers, t	to the Produce	et record fo	or the selected	Assigned
/iew Go To Gearch Available	Will pop Product. Direct na Product Searches wildcard	-up a c vigatio all ava search	on av ailabl	vay f le Pr	from Cu oduct N	istomers, t James, ER	to the Produce	et record fo	or the selected	Assigned
/iew Go To Gearch Available Assigned	Will pop- Product. Direct na Product Searches wildcard Products	-up a c vigatio all ava search associ	on av ailabl aing ated	vay f le Pr with	from Cu roduct N	istomers, t James, ER rticular Cu	to the Product P Numbers	et record fo	or the selected	Assigned
Jiew Jo To Gearch Available Assigned Products Available	Will pop- Product. Direct na Product Searches wildcard Products	-up a c vigatio all ava search associ	on av ailabl aing ated	vay f le Pr with	from Cu roduct N	istomers, t James, ER rticular Cu	to the Produce	et record fo	or the selected	Assigned
/iew Go To Gearch Available Assigned Products Available Products	Will pop- Product.Direct na ProductSearches wildcardProducts	-up a c vigatio all ava search associ	on av ailabl aing ated s that	vay f le Pr with	from Cu roduct N the par y be ass	Istomers, t James, ER rticular Cu igned to C	to the Product P Numbers Istomer.	et record fo	or the selected	Assigned Uses an * for
Jiew Jo To Gearch Available Assigned Products Available	Will pop- Product. Direct na Product Searches wildcard Products Active Pr Moves on	-up a c vigational and a c all avaints association association roductation and a c me or m	on av ailabl aing ated s that	vay f le Pr with may	from Cu roduct N i the par y be ass iilable P	Istomers, t James, ER rticular Cu igned to C Products to	to the Product P Numbers Istomer. Customers.	et record fo	or the selected Descriptions.	Assigned Uses an * for
View Go To Gearch Available Assigned Products Available Products Add	Will pop- Product. Direct na Product Searches wildcard Products Active Products Moves on Custome	-up a c vigatio all ava search associ roducta ne or n r assoc	ailabl ailabl aing ated s that nany ciatio	vay f le Pr with t may Ava n. D	from Cu roduct N the par y be ass uilable P rag-and	Istomers, t Iames, ER Ticular Cu igned to C Products to I-Drop ma	to the Product P Numbers Istomer. Customers. The Assigne y also be use	et record for and Short I ed Products ed instead of	or the selected Descriptions.	Assigned Uses an * for kes the
/iew Go To Gearch Available Assigned Products Available Products	Will pop- Product. Direct na Product Searches wildcard Products Active Products Moves on Custome	-up a c vigatio all ava search associ roducta ne or n r assoc	ailabl ailabl aing ated s that nany ciatio	vay f le Pr with t may Ava n. D	from Cu roduct N the par y be ass uilable P rag-and	Istomers, t Iames, ER Ticular Cu igned to C Products to I-Drop ma	to the Product P Numbers Istomer. Customers. The Assigne y also be use	et record for and Short I ed Products ed instead of	or the selected Descriptions.	Assigned Uses an * for kes the





Global Management>Customers: Shipping

Customer Num		Details Us	ers Billing) Assign Prod	ucts Shippin	g Sales Reps	Custom Properties						
31													
31		Customer Sh	ipping										
31		chie Use	Colorb Chi	pping Service		waa Chia							
31		Ship Via		pping service	Allow E	rop Ship							
31		Warehouse											
31		Ship Site											
31		-											
31		Assian Carriers											
31		Assign Carriers											
31		C											
31	1	View	Go To		Se	arch Available							
31	1	Assigned	Carriers			Available Carriers							
31		Na	me	Description		Name	Description						
31	: II					Carrier Name test	description						
31	1					FedEx	FedEx						
31						UPS	UPS						
31	1												
31	72				Add								
213	1												
218	1				Remove								
Field Name	Descri	iption											
Customer Shipping		A											
Ship Via			er specific	shipping ser	vice. Must	coordinate wit	th Assigned Carriers						
Warehouse			_				y from a specific						
	wareh						•						
Ship Site	Optior	hal field for	ship-from	location spo	ecification								
Allow Drop Ship	Flags	Customer as	s allowed	to place drop	o-shipping o	rders							
Drop Ship Fee	Adds f	flat-rate dro	p-ship fee	;									
Required													
Drop Ship	-		-			Ship-To addre	esses in distributor						
Customer		ios. Site des	sign and b	usiness-rule	s specific								
Assign Carriers Se													
View	-		ck-view w	vindow displ	aying the Ca	arrier Details	for the selected, Assign						
	Carrie												
Go To		0	away from	n Customers	, to the Carr	ier record for	the selected Assigned						
	Carrie												
Search Available						ns. Uses an *	for wildcard searching						
Assigned Carriers				particular C									
Available	Active	e Carriers th	at may be	assigned to	Customers.								
Carriers	 		,										
Add			•		-		eld and makes the						
-			-	_	-	ised instead o							
Remove	Remov	ves one or n	nanv Assi	gned Carrier	association	s and sends th	em back to the Availab						





Carrier field. Drag-and-Drop may also be used instead of the button.

Global Management>Customers: Sales Reps

0	Page Size: 200 Get Al	1 - 160 of 160					
Global Settings Global Management	Customer St	ip To	Details Users Billing a	Assign Products Shipping Sales Reps C	ustom Properties		
	✓ 31 1	np 10					
Customers	31 2	r	Yiew Go To	Search Available			
Products	31 3	ŧ	Assigned Salespersons		Av	ailable Salespersons	
Advanced Filtering	31 4	r	Name	Salesperson Number	N	lame	Salesperson Number
Crders	31 5		+ Steve Edwards	5672	c	October Test	2
Subscription Orders	31 6				S	teve Edwards	5672
Promotions	31 7	1					
Emails	31 8	i .					
Dealers	31 9 31 10	t					
Sales Reps	31 11	F					
valdes	31 12	Ň					
	31 13	,					
	31 14	X II					
	31 15	E			Add		
	31 16				Remove		
- Field Name	Descript	ion					1.
View			uick-view wind	ow displaying the Sal	les Ren De	tails for the se	elected
	Assigned			ow displaying the su			neetea,
	0		*		_		
Go To	Direct na	vigatio	n away from C	ustomers, to the Sales	s Rep recor	d for the selec	cted Assigned
	Sales Rep	× ×	•		•		U
~	-						
Search Available	Searches	all avai	ilable Sales Rej	o Names and Number	s. Uses an	* for wildcare	d searching
Assigned	Sales Rep	os assoc	ciated with the	particular Customer.			
Salespersons	-			-			
Available	Active Sa	ales Rei	ps that may be	assigned to Customer	s.		
Salespersons			······································	6			
÷							
Add	Moves or	ne or m	any Sales Reps	to the Assigned Sale	spersons fi	eld and make	s the Customei
			• •	y also be used instead	-		
			· ·	•			
Remove	Removes	one or	many Assigne	d Salespersons associ	ations and	sends them ba	ack to the
			• •	-			
	Available	sales	Jersons neid. D	rag-and-Drop may al	so be used	instead of the	oution.

*May require implementation of optional Advanced Module





Global Management>Customers: Custom Properties*

ilobal Settings ilobal Management	Customer	Ship To		Details	Users	Billing	Assign Products	Shipping	Sales Reps	Custom Properties	
Users	31	1	÷								
Customers	31	2	1	Add	Delete						
Products	31	3	E				Name				Value
Advanced Filtering	31	4	r								
Orders	31	5	•								

Fleia	Description
Name	
Add	Adds a new Custom Property Record.
Delete	Flags the selected Custom Property for deletion. Delete will execute upon clicking the top Save
	button.
Name	Name of the individual custom property.
Value	Property value, used to drive customizations.

*Exclusively used for customizations. May require implementation of advanced features.

s oftware Products



Product or part information is automatically synchronized with your ERP. The Management Console adds functionality by supporting areas for search-friendly content, detailed specifications and multiple product images.

Global Managements>Products: Details

•	Page Size: 30 <	Get All >	1 - 30 of 103										<	
Global Settings	Part 1	ERP Number	2 - Short	Details	Cont	Cate	Cross	Speci	Cust	Inve	Restr	Shipp	Subs	
Global Management	BBA10WB	BBA10WB	Boardi											
	BBA11MB	BBA11MB	Boardii	Refresh	From ERP	Copy Pi	roduct							
Products	BBA11WB	BBA11WB	Boardii		5				1					
Product Styles	BKH9456	BKH9456	Hauer			BBA10WB					RP Managed			
Advanced Filtering	BKK7894	BKK7894	King L	Short Des	scription *	Boarding Boot	, Black				out of Stock			
🗋 Orders	BK58945	BKS8945	Suther	ERP	Number	BBA10WB					iift Card			
Subscription Orders	BVR1472589	BVR1472589	Bevele	ERP Des	scription	Boarding Boot	, Black			A	llow Any Gift C	ard Amount		
Promotions	CAT-300-SCR-S DCD-100-SP	CAT-300-SCR-S DCD-100-SP	Junctic	Produ	ict Code				Ven	dor Ple	ase select ¥e	ndor 🔹		
Emails	DCD-100-3P DCD-200-ML	DCD-200-ML	Multi-L	Model	Number				Price Co	ode 🗌				
Dealers	DCD-300-OR	DCD-300-OR	Steel C		SKU				Tax Cod	e 1			_	
Vendors	DFBA55555	DFBA55555	Dragor		-								_	
	DFBB55555	DFBB55555	Dragor		UPC				Tax Cod				_	
	DSS-1000	DSS-1000	DSS Sa		UOM	EA			Tax Categ	ory			_	
	DSS-1010	DSS-1010	DSS Di	Sol	rt Order	1			C	ost 0				
	D55-1012	D55-1012	LNB(Lc		Active	11/04/2009	📰 5:00 A	M	Basic List Pr	rice 100				
	D55-1012C	D55-1012C	LNB Cc	Deactivati	on Date				Basic Sale Pi	rice 0				
	DS5-1500	DSS-1500	DSS Sa				·····		Sale Start D	ate			•	
	DSS-1800-K DSS-600	D55-1800-K D55-600	DSS Sa Chimne						Sale End D	-			_	
	EAD-400-BLK	EAD-400-BLK	Engine						Sale End D	ace			•	
	540-400-CDN	EAD 400 CDM	Casias											
Field Name	Description	n												
Refresh From ERP	Allows an	Allows an individual product to be updated with ERP data, rather than waiting for the												
	scheduled		1		1				,			0		
Copy Product	Manually	creates a d	uplicat	te prod	uct. C	lopies	all av	ailabl	e prod	uct d	ata. Ne	w iten	n is	
	identified		-	-		-			-					
D ())		2			ng ap	penue	uiou	ic i ai	U INAIII	C				
Part/Name	Product pa													
Short Description	Generally	the extend	led pro	duct na	nme, v	vithou	ıt abbı	eviati	ons. S	hould	l be un	ique a	S	
•	often used	to automa	ite crea	tion of	Page	Titles	s for S	EO				•		
ERP Number	Product pa				<u> </u>				Part/Na	ame				
ERP Description	Product de	escription f	from E	RP sys	tem if	f diffe	rent fi	om Sl	hort D	escrij	otion			
Product Code	Additional	optional	field fo	or prod	uct co	oding				-	•			
Model Number	Additional	optional	field fo	or prod	uct co	oding								
SKU	Stock Kee	ping Unit		•										
UPC	Universal		ode											
Sort Order	Rank at w	hich the Pi	oduct	display	s wit	hin its	assig	ned Pi	roduct	Cate	gorv			
Active	Date at wh											efaults	s to	
	12:00 AM	1			-					-p		• • • • • • • • • •		
Deactivation Date	Date at wh						nurch	acina	Δ tim	e ma	v he er	ecifie	d٠	
Deactivation Date	Defaults to	-		-			-	-	Aum	c ma	y be sp		u.	
ERP Managed	Indicates t						-		ntegra	tion s	ervice			
Out of Stock	Indicates r	-			-									
Gift Card*	Indicates p									on as	a navr	nent o	ntion	
	maneates	104401 15 (~ 5 ¹¹¹ C	u1 u/ UU1	und	co, cmg		51 100	empti	on as	a payr	nom 0	Puon,	

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	rather than a typical item
Allow Any Gift Card	Used for sites where gift card/certificate amount can be defined by the shopper, rather
Amount*	than offering cards at set values
Vendor*	Vendor assignment used for Vendor Markup calculations
Price Code	Optional field used for pricing calculations
Tax Code 1	Optional field used for tax calculations
Tax Code 2	Optional field used for tax calculations
Tax Category	Option field used for pricing calculations in the Price Matrix
Cost	Product cost that may be used for pricing calculations
Basic List Price	Simple list price field if Price Matrix is not implemented
Basic Sale Price	Simple sale price is Price Matrix is not implemented
Basic Sale Start	Date when Basic Sale Price is active
Basic Sale End	Date when Basic Sale Price is no longer active
ψ λ .Γ	

*May require implementation of optional Advanced Module

Global Management>Products: Content I

ge Size: 200 Get All	1 - 41 of 41											
Part	ERP Number	Short Descript	Details	Content	Categories	Cross-Sells	Specificati	ons Custom Properti	es Inventory	Restrictions	Shipping	Subscriptions
	456	Product Four Rev te	-									
4600-1	4600-1	Hinge, Manhead As	Content	t Details								
9-331-065-147	9-331-065-147	Housing Black	Smal	ll Image Path	UsorFilos/Imagos	/Products/bike 3 si	n.jpç Uplo	ad Preview				
ADD-200-5	ADD-200-5	Machined Casting										
BBA10WB	BBA10WB	Ski Boot, Black	Mediun	n Image Path	UserFiles/Images,	/Products/bike 3 m	d.jp(Uplo	ad Preview				
BBA11MB	BBA11MB	Ski Boot, Gray	Large	e Image Path	UserFiles/Images,	/Products/bike 3 lç	.jpg Uplo	ad Preview				
BBA11WB	BBA11WB	Ski Boot, Blue										
BKH9456	BKH9456	Hauer Bike	Content	t Managem	ent							
BKK7894	BKK7894	King L Bike	concent	er landgen								
BK58945	BKS8945	Sutherland Bike	Мая	kimize 🛛	Open HTML Editor	Find Repl	ace					
CAT-300-SCR-S	CAT-300-SCR-5	Junction Plug		2000 L								
DCD-100-SP	DCD-100-SP	Frame Rail	Des	signed for &#	#39;cross training,&nb	sp;extreme riding	and urban tran	sportation, the Ha	uer only -	asks that you reconside	r the limits of v	vhat's possible.
DCD-200-ML	DCD-200-ML	Multi-Level Frame A	2									
DCD-300-OR	DCD-300-OR	Steel O-Ring										
DSS-1000	DSS-1000	DSS Satellite Assem	Docume	ent Manage	er							
DSS-1010	DSS-1010	DSS Dish	Add	Delete	•							
D55-1012	DSS-1012	LNB(Low Noise Block		-							1	
D55-1012C	D55-1012C	LNB Converter - FG			Name	Descrip		Path		File Name		Creation Date
	DSS-1500	DSS Satelitte Comm		Product_De	tail_Variations.pdf	Product_Detail_	Variations.pdf	Documents/Product/	Produc	t_Detail_Variations.pdf	Tue Dec	1 15:47:55 GMT-0600 20
eld Name		Descriptio	n									
ontent Detail	s Sectio	n										
nall Image P	ath	Calls out fl	ne sma	allest	image as	sociate	d with	the Produc	ct. Often	a thumb	nail di	splayed in
nun muge i	aun			e smallest image associated with the Product. Often a thumbnail displayed in								
		the Shoppi	<u> </u>									
edium Image	e Path	Calls out a	medi	um ir	nage. Us	ually di	splaye	ed on Categ	ory and	Search R	esult	pages
Ų					_			-	-			
rge Image P	aui							Jsually disp				
oload		Opens a W	'indow	vs Ex	plorer se	ssion, a	llowii	ng you to bi	owse fo	r an imag	ge and	upload it
								following in				
										jes. .jpg ,	·gu,·ŀ	nig
eview		Opens a po	p-up	wind	ow to pre	eview tł	ne asso	ociated image	ge			
ontent							_					
anagement												
ction												
		Movimiza	than	ntine	Contart	Manazi	mart	Anoo Without	n movie	aired this	hutte	
aximize						wanage	ement	Area. Whe	n maxin	nzea, this	s duite	011 W111
		change to '										
oen HTML E	ditor	Opens a po	n un	wind	ow of the	WVCI	WVC	aditor alla	wing of	ntont un	latas v	without

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Global Management>Products: Content II

Meta Data	
SEO Page Title 🔺	
Meta Description	
Meta Keywords	

Meta Data Section	
Page Title	Page title to display at top browser. SEO friendly. Limited to 72 char
Meta Description	Description to display on SRPs. SEO friendly. Limited to 185 char
Meta Keywords	Meta Tags or Keywords for SEO/SEM





Global Management>Products: Categories

duct Categories				
View Go To	Search	Available		
Assigned Categories		Available Ca	ategories	
Category	Parent	Category	v Pare	≥nt
Category One		Category	One	
		Add		
		Remove		

Field Name	Description
View	Will pop-up a quick-view window displaying the Category Details for the selected, Assigned
	Category
Go To	Direct navigation away from Products, to the Category record for the selected Assigned
	Category
Search	Searches all available Category names. Uses an * for wildcard searching
Available	
Assigned	Categories in which the select Product appears
Categories	
Available	Active Categories that may be assigned to Products
Categories	
Add	Moves one or many Categories to the Assigned Categories field and makes the Product
	association. Drag-and-Drop may also be used instead of the button.
Remove	Removes one or many Assigned Category associations and sends them back to the Available
	Categories field. Drag-and-Drop may also be used instead of the button.





Global Management>Products: Cross-Sells

etails	Content	Categories	Cross-Sells	Specifications	Custom Propertie	s Inventory	Restrictions	Shipping	Subscriptions
Cross So	old Products								
			5earch Available						
	10 00								
Assig	ined Cross Sells					Available Products			
	Name	S	hort Desc.			Name		Short Desc.	
					Add				
					Remove				
L									

Accessories

Assigned Accessories	Search Available	Available Products	
Name	Short Desc.	Name	Short Desc.
		Add	
		Remove	

Field Name	Description							
Cross Sold Produc	Cross Sold Products							
Search Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for							
	wildcard searching							
Assigned	Cross Sold Products that display on the selected Product detail page							
Products								
Available	Search results from Search Available function of Products that may be assigned as Cross							
Products	Sells							
Add	Moves one or many Products to the Assigned Products field and makes the Cross Sell							
	association. Drag-and-Drop may also be used instead of the button							
Remove	Removes one or many Cross Sell associations and sends them back to the Available							
	Products field. Drag-and-Drop may also be used instead of the button							
Accessories*								
View	Will pop-up a quick-view window displaying the Product Details for the selected,							
	Accessory Product							
Go To	Direct navigation away from selected Product, to the Product record for the selected							
	Accessory							
Search Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for							
	wildcard searching							





Assigned	Accessory Products that display on the selected Product detail page
Accessories	
Available	Search results from Search Available function of Products that may be assigned as
Accessories	Accessories
Add	Moves one or many Products to the Assigned Products field and makes the Cross Sell
	association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many Cross Sell associations and sends them back to the Available
	Products field. Drag-and-Drop may also be used instead of the button

*May require implementation of optional Advanced Module

Global Management>Products: Specifications

Part	ERP	Details	Content	Categories	Cross-Sells	Specifications	Custom Properties	Inventory	Restrictions	Shipping	Subscriptions
	456		-								
4600-1	4600-1	Add	Delete								
9-331-065-147	9-331-		Í		1						
ADD-200-5	ADD-2		Name	¥alue	Sort Orde				 Active 		
BBA10WB	BBA10		Frame Details	Frame Details	1		Frame Details	Sort Orde	er 1		
BBA11MB	BBA11		Drive Train	Drive Train	2	V	Gears	Nam	ne Frame De	tails	
BBA11WB	BBA11							Descriptio	n Frame De	Faile	
BKH9456	BKH94										
BKK7894	BKK78'							Valu	Je Frame De	tails	
BK58945	BKS89							Conte	nt Manageme	nt	
CAT-300-SCR-S	CAT-3										2
DCD-100-SP	DCD-1							Ma	aximize	Open HTML Edi	tor Find Replace
DCD-200-ML	DCD-2									pumping and yo	ur face smiling!
DCD-300-OR	DCD-3								>		

Field Name	Description					
Add	Creates a new product specific specification record					
Delete	Flags a selected specification for deletion					
Active	Flags specification as active					
Sort Order	Order in which the specification is displayed amongst any other specifications associated with the same Product					
Name	Specification name					
Description	General description of specification. May be used for website display					
Value	Optional field if specification is a simple name:value pair, rather than more detailed content utilizing the Content Manager					
Content Manage	ment					
Maximize	Maximizes the entire Content Management Area. When maximized, this button will change to "Minimize"					
Open HTML Editor	Opens a pop-up window of the WYSIWYG editor, allowing content updates without requiring HTML codes, image and Flash imports					
Find Replace	Opens a pop-up window allowing single or group search and replace functions of the entire content area					
Content Area	Field used to store the specified content. Default display is HTML, but end-user display may be previewed by opening the HTML Editor					





Global Management>Products: Custom Properties*

tails	Content	Categories	Cross-Sells	Specifications	Custom Properties	Inventory	Restrictions	Shipping	Subscriptions
dd	Delete								
		P	art				v	alue	
1	1200 12	r	urt					uruc	
IsCo	onfigured								
Trac	ckInventory				false				

Field	Description
Name	
Add	Adds a new Custom Property Record
Delete	Flags the selected Custom Property for deletion. Delete will execute upon clicking the top Save
	button
Name	Name of the individual custom property
Value	Property value, used to drive customizations

*Exclusively used for customizations. May require implementation of advanced features.

Global Management>Products: Inventory

ails	Content	Categories	Cross-Sells	Specification	Custom Properties	Inventory	Restrictions	Shipping	Subscriptions	
ventor	y Details									
Add	Delete) 🗌 Trac	ck Inventory	Qty On Hand	56					
Т	ransaction	Date		Descr	iption		Quantity	on Hand		
06	5/25/09			Test C	ne		23			
06/25/09		Test T	VO		33					

Field Name	Description
Add	Adds a new inventory transaction record
Delete	Flags a transaction record for deletion. Delete will execute upon clicking the top Save button
Track Inventory	Indicates Product is to have inventory transactions tracked
Qty On Hand	Current quantity on hand
Transaction	Date at which the inventory transaction was rolled up
Date	
Description	Describes the type of inventory transaction
Quantity on	Quantity on hand as of the specified transaction
Hand	





Global Management>Products: Restrictions

		8										
	Part	ERP	Details	Content	Categories	Cross-Sells	Specificati	Custom Pr	Inventory	Restrictions	Shipping	Subscripti
	Product Four Co	456 py 456	Add	Delete								
1	Product One	1	1 Name			State				Is Active		
	Product Three	3	+ Ne	w Restriction		MN		1				
	Product Two	23										
Field Name		Descrip	otion									
Add	ł	Creates	a new 1	estrictio	on record	on the sel	ected Prod	duct				
Del	ete	Flags a	selected	l restric	tion recor	d for dele	tion					
Nar	ne	Name o	f the pa	rticular	restrictio	n						
Stat	e	State fro	om whi	ch the P	roduct is	restricted						

Is Active Flags restriction as active, limiting product availability

* May require implementation of advanced features

Global Management>Products: Shipping

Details	Content	Categories	Cross-Sells	Specifica	Custom P	Inventory	Restricti	Shipping	Subscript
Product	Details								
	Shipping We	ight 10							
	Shipping Ler	ngth O							
	Shipping W	idth 0							
	Shipping He	ight 0							
Shipping Amount Override		ride 0							
Handling Amount Override		ride 0							
	Classifica	ition							

Field Name	Description
Shipping Weight	Product's shipping weight
Shipping Length	Length of shipping box (if product ships alone)
Shipping Width	Width of shipping box (if product ships alone)
Shipping Height	Height of shipping box (if product ships alone)
Shipping Amount	Optional freight charge override per product
Override	
Handling Amount	Optional handling charge override per product
Override	
Classification	Optional coding field for regulatory classification: DOT, IATA, etc





Global Management>Products: Subscriptions*

Details	Content	Categories	Cross-Sells	Specifications	Custom Properties	i Inventory	Restrictions	Shipping	Subscriptions						
roduct	Details														
2	Subscription Pro	oduct Cyc	te Period Sel	ect Cycle Period	•										
]	Include in Initia	l Order Periods	per Cycle 0												
F	Fixed Price	Tot	al Cycles 0												
ci	hip Via Ple	ase Select Ship	¥ia 🔻												
		-				— • • — •									
Cycle M	1onths 🗹 J	anuary 🗹 Feb	ruary 🗹 March	i 🗹 April 🗹 May	/ 🖌 June 🗹 July	V August V S	Cycle Months 🗹 January 🗹 February 🗹 March 🗹 April 🗹 May 🗹 June 🗹 July 🗹 August 🗹 September 🗹 October 🗹 November 🗹 December								
			aarch Available												
		9	Search Available	2											
Assig	ned Products		Search Available	2		Available Products									
Assig	ned Products		Search Available			Available Products		Short Desc							
Assig								Short Desc	<u>.</u>						
Assig					Add			Short Desc							
Assig					Add Remove			Short Desc	<u>.</u>						
Assig								Short Desc							
Assig								Short Desc	<u>-</u>						

Field Name	Description
Subscription	Indicates that the Product is a subscription, with subsidiary, associated Products
Product	
Include in Initial	Flags subscription to be shipped with originating order
Order	
Fixed Price	Indicates that the subscription price remains fixed, throughout the total cycle length, despite
	any pricing changes to associated Products
Cycle Period	Unit of measure for Subscription
Periods per Cycle	Number of days or months that constitute the subscription
Total Cycles	Total length of subscription, without renewal
Ship Via	Optional shipping service selection
Cycle Months	Specific months that may be assigned to monthly cycle periods
Search Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for
	wildcard searching
Assigned	Products associated with the current subscription
Products	
Available	Search results from Search Available function of Products that may be associated with a
Products	Subscription
Add	Moves one or many Products to the Assigned Products field and makes the Subscription
	association. Drag-and-Drop may also be used instead of the button.
Remove	Removes one or many Assigned Products associations and sends them back to the
	Available Products field. Drag-and-Drop may also be used instead of the button.

*May require implementation of optional Advanced Module





Product Styles is an optional feature, allowing the management of traits and variables per product, by group. The most common example of this functionality is apparel, where shoppers select size and color on a single product page, in order to determine an individual item SKU.

	Page Size: 30 Get All 1 - 0 of 0 0
Global Settings Global Management	Name Description Is Active Details Products
Customers	Product Style Information
Products	Name
Advanced Filtering	Description
Orders	Active
Subscription Orders	Style Traits
Emails	
Dealers	Add Delete
Sales Reps	Sort Name Unselecti Style Trait Values
	Add Delete
	Sort Value Defau
Field Name	Description
Product Style Info	rmation
Name	Name of Style class that products will be assigned to, such as Shirts
Description	Description of Style class
Active	Flags Style class as active
Style Traits	
Add	Creates a new Style Trait, such as color
Delete	Flags a Style Trait for deletion
Sort	Sort order for Trait selectors
Name	Name of Style Trait, such as color
Unselected Value	Optional content to display if no default value is flagged, such as "Select Color"
Style Trait Values	
Add	Creates a new Style Trait Value, such as red
Delete	Flags a Style Trait Value for deletion
Sort	Sort order of Value, within selector
Value	Actual value, such as red
Default	Flags value as default to display as pre-selected within selector

Global Management>Product Styles: Details





Global Management>Product Styles: Products

Details Products

n Products to this Sty	yle Class		
	Search Available		
ssigned Products		Available Products	
Name	Short Desc.	Name	Short Desc.
		Add	
		Remove	

Assign Child Products to the Style Product Selected Above

	Search Available		
ed Products		Available Products	
Name	Short Desc.	Name	Short Desc.
		Add	
		Remove	

Assign Style Trait Values for the Child Product Selected Above

Trait Name	Trait Value

Field Name	Description
Assign Products	s To This Style Class
Search Available	Searches all available Product Names and Short Descriptions. Uses an * for wildcard searching
Assigned Products	Parent product(s) assigned to the selected Style Class, such as Men's Polo Shirt
Available Products	Search results from Search Available function of products available for assignment
Add	Moves one or many Products to the Assigned Products field and makes the styling association. Drag-and-Drop may also be used instead of the button.
Remove	Removes one or many Assigned Products associations and sends them back to the Available





	Products field. Drag-and-Drop may also be used instead of the button.
Assign Child P	roducts to the Style Product Selected Above
Search	Searches all available Product Names and Short Descriptions. Uses an * for wildcard searching
Available	
Assigned	Child products assigned to the Parent style selected above
Products	
Available	Search results from Search Available function of products available for assignment
Products	
Add	Moves one or many Products to the Assigned Products field and assigns it to the selected style
	parent. Drag-and-Drop may also be used instead of the button.
Remove	Removes one or many Assigned Products associations and sends them back to the Available
	Products field. Drag-and-Drop may also be used instead of the button.
Assign Style Tr	ait Values for the Child Product Selected Above
Trait Name	Dropdown containing the name of the Style Trait Values available from the Style Class Trait
	Values entered on the Details tab
Trait Value	Dropdown containing the name of the Style Trait Values available from the Style Class Trait
	Values entered on the Details tab





Advanced Filtering is an optional advanced implementation module, supporting grouping of products on the website by assigned characteristics. Additions and edits to Advanced Filtering must be fully integrated in the website design.

Global Management>Advanced Filtering: Details

	Page	ge Size: 200 Get	All 1 - 3 of 3						
Global Settings		1 80 1	1 10 P. 10	Details	Filter Values				
Global Management		Name	Label	Decails	The Yaldes				
Users		Color	Color Label Filter By Function	Filter Se	ection Information				
Customers		Style	Filter By Style		-				
Advanced Filtering		20,00	1 100 07 20710	Name	* Color				
Orders				Label	* Color Label				
Subscription Orders					Active				
Promotions									
🗋 Emails				Assign	Categories				
Dealers									
Sales Reps				Add	Delete				
Vendors					Sort	Category	Is Active		
Field Name	Description	n							
Filter Section In	iformation								
Section Name	Internal na	me for produ	ict character	ristic or	attribute				
Section Label		Name that will display on the website. Often the title of a dropdown							
Active		Flags section as an active filtering option							
Assign Categor	U	ion us un uou	ve meening (option					
Add		new Category	/Filtor Soot	ion acci	anmont				
					-				
Delete	-	egory for del							
Sort	Order in which the selected Category is to appear in the Filter Section								
Sort	Dropdown of active Categories that may be assigned to the Filter Section								
Category		of active Ca	tegories tha	t may b	e assigned to	o the Filter Section			

*May require implementation of optional Advanced Module and/or advanced Integration services





Global Management>Advanced Filtering: Filter Values

Name	Label Color Label		Details	Filter V	alues							
function	Filter By Function	- (Add	Delete								
tyle	Filter By Style							nae 11 de				
				Value	5	Active	Assign	Products				
				Blue	1	✓	_					
				Red	2	~			Search	Available		
							Assi	gned Products			Available Products	
								Name	Short Desc.		Name	Short Desc.
								Product One	Product One edit			Product Four Rev I
										Add	Product Four Copy	Product Four Rev I
										Remove	Product One	Product One edit to
										·	Product Three	Product Three
											Product Two	Product Two
							Assign	Categories				
							-					
									Search	Available		
							Assi	gned Categories			Available Categories	
								Name	Short Desc.		Name	Short Desc.
		_									Category 34	October 12 manual
										1		
										Add	Category One	Category One

Field Name	Description
Filter Value Deta	iils
Add	Creates a new Filter Value record to add detail to
Delete	Flags a Filter Value for deletion
Value	The value name. Displays as an option in the Filter Section dropdown
Sort Order	Order in which the Value appears amongst all values assigned to the same Filter Section
Active	Flags Value as an active option to select in the Filter Section
Assign Products	
Search	Searches all available products to which the value may be applied. Uses an * for wildcard
Available	searching
Assigned	Products that are assigned the selected Filter Value
Products	
Available	Active Products that may be assigned to the filter
Products	
Add	Moves one or many Products to the Assigned Products field and makes the filter value
	association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many filter associations and sends them back to the Available Products
	field. Drag-and-Drop may also be used instead of the button
Assign Categorie	25
Search	Searches all available categories to which the value may be applied. Uses an * for wildcard
Available	searching
Assigned	Categories that are assigned the selected Filter Value
Categories	
Available	Active Categories that may be assigned to the filter
Categories	

insite software



Add	Moves one or many Categories to the Assigned Categories field and makes the filter value
	association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many filter associations and sends them back to the Available Categories
	field. Drag-and-Drop may also be used instead of the button

*May require implementation of optional Advanced Module and/or advanced Integration services

s oftware Orders



Orders are fully integrated with your ERP, submitted in frequent batch processes. Order header and line item detail records are all available in the Management Console.

Global Managements>Orders: Details

Field Name Description Resubmit to ERP Submits the individual, selected order, rather than waiting for batch process Order Number Unique order number, created by Comerce. May or may not be the same as ERP Order Number Unique order number, created by Comerce. May or may not be the same as ERP Order Number Unique order number, created by Comerce. May or may not be the same as ERP Order Number Unique order number, created by Comerce. May or may not be the same as ERP Order Number Order specific purchase order number Order Total Total charges: Product subtotal + Freight + Tax + Miscellaneous Charges - Discounts Price Ode Order specific currency code Status Order specific currency code Status Order specific currency code Order Specific Currency code Order specific currency code Order Specific Currency Order specific currency code Order Specific Currency code Order specific currency code Order Specific Currency code Order specific Currency code Order specific Order used for pricing calculation Order specific currency code Order specific Currency code Order specific currency code Status Order specific currency code Status<		Page Size: 30 <	Get All > 1 - 30 of 5	57							٥
Image: Control of the second secon	Global Settings	Order Number	Customer PO O	Details	Bill To	Ship To	Order Lines	Shipping & Taxes	Shipments	Credit Card Trar	asactions
Field Name Description Field Name Description Refereshfrom ERP Submits the individual, selected order, rather than waiting for batch process Order Number Unique order number, created by ERP. May or may not be the same as ERP Order Number, depending on implementation specific requirements Customer PO Customer Specific code used for pricing calculation Order Specific code used for pricing calculation Terms Code Order specific code used for pricing calculation Price Code Order specific code used for pricing calculation Status Order status, such as: Pending, Submitted, Shipped, Complete Order Date Date and time the order was placed Batch for placing order Discounts Order Date Order status, such as: Pending, or insplementation Specific requirements Customer PO Customer specific payment terms code. Often defaulted from Customer Customer Order status, such as: Pending, Submitted, Shipped, Complete Order status, such as: Pending, Submitted, Shipped, Complete Order Date Date and time the order was placed Batch and time the order maneer Refreshere Optional, order and customer specific reference number Customer Order specific data and time the order was placed Date and time the order was placed Date and t											
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Prior Over State Over State		QABC000573	03/0	1 Custon	ner Informal	tion					
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Interview	Advanced Filtering				order Number	1e996fdf-	3c9f-4d0d-b9c3-15				
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Image: Control of the second secon	_	w000481	11/0	e	Terms Code	30					
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Price CodeOrder specific code used for pricing calculationTerms CodeOrder specific payment terms code. Often defaulted from CustomerCurrencyOrder specific currency codeStatusOrder status, such as: Pending, Submitted, Shipped, CompleteOrder DateDate and time the order was placedBatch NumberCommerce submission batch numberUsernameUsername for logged in account responsible for placing orderBuyerOptional field for Buyer nameCustomerOptional, order and customer specific reference numberReference 1Optional, order and customer specific reference number	Customer PO	Customer specif	fied purchase of	order nu	mber						
Terms CodeOrder specific payment terms code. Often defaulted from CustomerCurrencyOrder specific currency codeStatusOrder status, such as: Pending, Submitted, Shipped, CompleteOrder DateDate and time the order was placedBatch NumberCommerce submission batch numberUsernameUsername for logged in account responsible for placing orderBuyerOptional field for Buyer nameCustomerOptional, order and customer specific reference numberReference 1Optional, order and customer specific reference number	Order Total	Total charges: P	roduct subtota	al + Frei	ght + '	Tax +	Miscella	aneous Char	rges - D	iscounts	
CurrencyOrder specific currency codeStatusOrder status, such as: Pending, Submitted, Shipped, CompleteOrder DateDate and time the order was placedBatch NumberCommerce submission batch numberUsernameUsername for logged in account responsible for placing orderBuyerOptional field for Buyer nameCustomerOptional, order and customer specific reference numberReference 1Optional, order and customer specific reference numberReference 2Optional, order and customer specific reference number	Price Code	Order specific c	ode used for p	ricing c	alculat	tion					
StatusOrder status, such as: Pending, Submitted, Shipped, CompleteOrder DateDate and time the order was placedBatch NumberCommerce submission batch numberUsernameUsername for logged in account responsible for placing orderBuyerOptional field for Buyer nameCustomerOptional, order and customer specific reference numberReference 1Optional, order and customer specific reference numberReference 2Optional, order and customer specific reference number	Terms Code	Order specific p	ayment terms	code. O	ften de	efault	ed from	Customer			
Order DateDate and time the order was placedBatch NumberCommerce submission batch numberUsernameUsername for logged in account responsible for placing orderBuyerOptional field for Buyer nameCustomerOptional, order and customer specific reference numberReference 1Optional, order and customer specific reference numberReference 2Optional, order and customer specific reference number	Currency	Order specific c	urrency code								
Batch NumberCommerce submission batch numberUsernameUsername for logged in account responsible for placing orderBuyerOptional field for Buyer nameCustomerOptional, order and customer specific reference numberReference 1CustomerCustomerOptional, order and customer specific reference numberReference 2Optional, order and customer specific reference number	Status	Order status, suc	ch as: Pending	, Submi	tted, S	hippe	d, Comp	olete			
UsernameUsername for logged in account responsible for placing orderBuyerOptional field for Buyer nameCustomerOptional, order and customer specific reference numberReference 1Optional, order and customer specific reference numberCustomerOptional, order and customer specific reference numberReference 2Optional, order and customer specific reference number	Order Date	Date and time th	ne order was p	laced							
Buyer Optional field for Buyer name Customer Optional, order and customer specific reference number Reference 1 Optional, order and customer specific reference number Customer Optional, order and customer specific reference number Reference 2 Optional, order and customer specific reference number	Batch Number	Commerce subm	nission batch i	number							
Customer Reference 1Optional, order and customer specific reference numberCustomer Reference 2Optional, order and customer specific reference number	Username	Username for lo	gged in accou	nt respo	onsible	for p	lacing or	der			
Reference 1 Optional, order and customer specific reference number Reference 2 Reference 2	Buyer	Optional field for	or Buyer name	;							
Reference 1 Optional, order and customer specific reference number Reference 2 Reference 2	Customer	Optional, order	and customer	specific	refere	nce n	umber				
Reference 2	Reference 1	1 /		1							
Reference 2	Customer	Optional, order	and customer	specific	refere	nce n	umber				
	Reference 2	1 / 22		T							
	Notes	Optional, order	specific notes								

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Global Managements>Orders: Bill To

Customer Informati	on	
Customer Number 🜸		
Company		
First Name	Contact 1	
Last Name	Contact 2	
Address 1 🜸	Contact 3	
Address 2	Phone 1	
Address 3	Phone 2	
City 🗚	Phone 3	
Country *	Email	
State 🗚	Fax	
County	Sales Rep	
Zip/Postal Code 🔹	End User Type	

Field Name	Description
Customer	Automatically assigned Customer number. Created either by ERP and then refreshed, or by
Number	website. Customer number formatting can be managed via Application Settings
Company	Company for B2B commerce. May also be used for B2C situations (E.G.: Consumer shipping
	address is their work)
First Name	First name of primary contact and/or end-use customer
Last Name	Last name of primary contact and/or end-use customer
Address 1	First line of billing address
Address 2	Second line of billing address
Address 3	Third line of billing address
City	City for billing address
Country	Country of billing address
State	State/Province of billing address
County	County of billing address. Optional
Zip/Postal	Zip/Postal code of billing address
Code	
Contact 1	Optional additional contact field. Generally used for B2B scenarios where previous First/Last name fields are not used
Contact 2	Optional additional contact field. Generally used for B2B scenarios where previous First/Last name fields are not used
Contact 3	Optional additional contact field. Generally used for B2B scenarios where previous First/Last name fields are not used
Phone 1	Primary email address for Customer's billing location
Phone 2	Primary Fax for Customer's billing location
Phone 3	Primary telephone number for Customer's billing location
Email	Optional additional telephone number for Customer's billing location
Fax	Optional additional telephone number for Customer's billing location
Sales Rep	Optional assigned Sales Representative name or code
End User	Customer coding field. Often used for reporting purposes





Type

Global Managements>Orders: Ship To

C	etails	Bill To	Ship To	Order Lines	Shipping & Taxes	Shipments	Credit Card Transactions
	Custom	er Informa	tion				
	Custor	ner Number	*				
		Company			Ship To 🔹		
		First Name			Contact 1		
		Last Name			Contact 2		
		Address 1	*		Contact 3		
		Address 2			Phone 1		
		Address 3			Phone 2		
		City	*		Phone 3		
		Country			Email		
		State	*		Fax		
		County					
	Zio/ł	Postal Code	*				

Field Name	Description
Customer	Automatically assigned Customer number. Created either by ERP and then refreshed, or by
Number	website. Customer number formatting can be managed via Application Settings
Company	Company for B2B commerce. May also be used for B2C situations (E.G.: Consumer
	shipping address is their work)
First Name	First name of primary contact and/or end-use customer
Last Name	Last name of primary contact and/or end-use customer
Address 1	First line of delivery address
Address 2	Second line of delivery address
Address 3	Third line of delivery address
City	City for delivery address
Country	Country of delivery address
State	State/Province of delivery address
County	County of delivery address. Optional
Zip/Postal Code	Zip/Postal code of delivery address
Sequence/Ship	Indicates if the customer record is for the ship to address is the same as the billing address
То	(generally sequence 0) or a subsidiary ship-to address (generally sequence 1 or greater)
Contact 1	Optional additional contact field. Generally used for B2B scenarios where previous First/Last
	name fields are not used
Contact 2	Optional additional contact field. Generally used for B2B scenarios where previous First/Last
	name fields are not used
Contact 3	Optional additional contact field. Generally used for B2B scenarios where previous First/Last
	name fields are not used
Phone 1	Primary telephone number for Customer's delivery location
Phone 2	Optional additional telephone number for Customer's delivery location
Phone 3	Optional additional telephone number for Customer's delivery location

insite software



EmailPrimary email address for Customer's delivery locationFaxPrimary fax number for Customer's delivery locationSales RepOptional assigned Sales Representative name or codeEnd User TypeCustomer coding field. Often used for reporting purposes

Global Managements>Orders: Order Lines

Details Bill To Ship To Order Lines Shipping & Taxes Shipments Credit Card Transactions

-	Sta	atus	LI	ne	Release	Product Name	Description	Qty Or	dered Qt	y Shipped	Unit Of Measure
etail	5 Bill To	Ship To	Order Lines	: Shipping & Tax	es Shipments	Credit Card Transaction	5				h
F	Regular Price	Actu	al Price	Extended Reg	Extended Actu	Tax Code 1	Tax Code 2	Due Date	Promise Date	Ship Site	Notes

Field Name	Description
Status	Status of the specific line. Ordered, shipped, reserved, etc. Implementation specific
Line	Item line number
Release	Optional specified release
Product Name	Product/Part name
Description	Product Short Description
Qty Ordered	Quantity ordered per line
Qty Shipped	Quantity shipped per line
Unit of Measure	Product/Line unit of measure
Regular Price	Regular price, without discounting
Actual Price	Line item price, after discounts and/or matrix calculations
Extended Regular Price	Regular price X quantity ordered
Extended Actual Price	Actual price X quantity ordered
Tax Code 1	Optional tax code
Tax Code 2	Optional tax code
Due Date	Default due date per line
Promise Date	Optional promise date per line
Ship Site	Optional shipment site specification
Notes	Option notes per line





Global Managements>Orders: Shipping & Taxes

Г	etails	Bill To	Ship To	Order Line	e chi	nning 9. Tauga	Shipments	Credit Card Transactions
-	recalls	DIII TO	Subto	order Line	s Shi	pping & Taxes	Shipments	create cara transactions
	Custom	er Informa	tion					
			_					
		Ship	oping 0.(10				
		State	eTax 0.0	10				
		Loca	ITax 0.(10				
		Han	dling 0.0	10				
		Promotion	Total 0.0	10				
	Rec	juested Ship	Date			•		
	Shipme	nt Quote Nu	mber					
		Tax Co	ode 1					
		Tax Co	ode 2					
			\checkmark	Ship Early				
			\checkmark	Ship Partial				
			<u> </u>	and a star				

Field Name	Description
Shipping	Any freight fees charged to order
State Tax	Any State-based tax charged to order
Local Tax	Any Zip/Postal Code based tax charged to order
Handling	Any additional handling fees charged to order
Promotion Total	All product and freight discounts applied to order
Requested Ship Date	Specified ship date of order. A time may be specified: Defaults to 12:00 AM if blank
	in refresh or import.
Shipment Quote	Shipping quote reference number, if applicable
Number	
Tax Code 1	Order specific tax code
Tax Code 2	Order specific tax code
Ship Early	Flags order as being allowed to ship before requested ship date
Ship Partial	Flags order as being allowed to ship incomplete



Number



Global Managements>Orders: Shipments

Details I	Bill To	Ship To (Order Lines	Shipping & Taxes	Shipments	Credit Card Transactio	ons
	Shipm	ent Number		Shipment Date	1	ASN Sent	Email Sent
Packages							
	i	Carrier		Package Number		Ship ¥ia	Tracking Number
ield Name		Descriptio					
hipment umber		Shipment	dentifica	tion number			
hipment Da	ate	Date of pri					
SN Sent						vanced shipping no	
mail Sent						pment confirmatio	n emails
arrier		Specific C	arrier of s	shipment, such as	FedEx, UP	S, etc.	
ackage		Optional p	ackage II	D. Often used to i	dentify spec	ific boxes when a s	shipment may consist o
umber		multiple pa	ackaged				
hip Via		Carrier's s	hipping s	ervice code, such	as 1Day, 2I	Day, Ground, etc.	
racking		Carrier ass	igned tra	cking number per	package		





Global Managements>Orders: Credit Card Transactions

Details	Bill To	Ship To	Order Lines	Shipping & Taxes	Shipments	Credit Card Transactions			
Go To C	redit Card I	Processing (o Add New Tran	saction					
Т	ype	D	ate	Amount	Result	Auth Code	PNRef	RespMsg	Status
Field N	lame			Description					
Go To (Credit	Card		Navigates aw	ay from	Orders to Credit C	ard Process	ing, facilitating	g additional
Process	ing			tasks such as	manual c	lelayed capture pro	ocessing		
Гуре				Credit card tr	ansaction	type such as Auth	norization o	r Sale	
Date				Date of each	credit car	d transaction asso	ciated with	the order	
Amoun	t			Type of each	credit ca	rd transaction asso	ciated with	the order	
Result				Result code of	of each tra	ansaction			
Auth C	ode			Payment proc	cessor spe	ecific authorization	n code for e	ach credit card	transaction
PN Ref	•			7	1	number from payn			
RespM	sg					yment gateway	U	•	
Status	<u> </u>			_	-	ssigned by payme	nt gateway,	such as approv	ved, declined,
				etc.				11	





Subscription Orders allow the automation of re-orders, restocking and suchlike. These order types are generated by the Subscription Products Advanced Module.

Customers Products Product Styles Advanced Filtering Orders Subscription Orders	Order Number	Customer Num	Customer Name	Active	Next Order Date	Details Order Number Customer Number Customer Name Active	03/03/2010 12:00 AM
Users Customers Products Product Styles Advanced Filtering Orders Subscription Orders						Customer Number Customer Name	02/02/2010
Products Product Styles Advanced Filtering Orders Subscription Orders						Customer Number Customer Name	02/02/2010
Product Styles Advanced Filtering Orders Subscription Orders						Customer Name	02/02/2010 - 12:00 AM
Advanced Filtering Orders Subscription Orders							02/02/2010 = 12:00 AM
Orders Subscription Orders							03/03/2010 = 12:00 AM
Orders Subscription Orders Promotions						Active	02/02/2010 12:00 AM
							12:00 AP
Promotions						Deactivate	03/03/2010 📰 12:00 AM
						Last Order Date	
Emails							
Dealers						Next Order Date	
Sales Reps						Shipping Service	Please Select
Vendors						Cycle Period	Please Select 🔹
					li l	Periods Per Cycle	
						Total Cycles	
						Total Cycles	
							Fixed Price

Global Management>Subscription Orders: Details

Field Name	Description
Order Number	Unique order number, created by Commerce. May or may not be the same as ERP Order
	Number, depending on implementation specific requirements
Customer	Automatically assigned Customer number
Number	
Customer Name	Subscription Customer. May be a Company name or First: Last name
Active	Date when subscription begins. A time may be specified: Defaults to 12:00 AM if blank in
	refresh or import.
Deactivate	Date when subscription ends. A time may be specified: Defaults to 12:00 AM if blank in
	refresh or import.
Last Order Date	Most recent subscription order date
Next Order Date	Next order date, according to subscription cycle
Shipping Service	Specific method of shipping the subscription
Cycle Period	Unit of measure for Subscription
Periods per	Number of days or months that constitute the subscription
Cycle	
Total Cycles	Total length of subscription, without renewal
Fixed Price	Locks in the subscription price for the duration of the total cycles
Include in Initial	Flags subscription as an element of the Customer's first order
Order	

*May require implementation of optional Advanced Module





Promotions allow a wide variety of consumer, dealer and distributor incentivizing. (Please see the Promotion Rule and Result Indices for more information)

Global Management>Promotions: Details

Details	Rules	Results
		✓ Active
	Name	Big sale Discount
Orc	ler Count	0
	Rank 🖇	k 2
Activa	tion Date	11/01/2009 III 11:00 PM 🔻
Deactiva	tion Date	02/28/2010 III 12:00 PM V
De	escription 🔹	\$300 off a \$1000 order

Field Name	Description					
Active	In conjunction with activation date, flags promotion as active					
Name	Promotion name. May be used for website display and reporting					
Order Count	Number of orders placed against the promotion. If greater than 1, promotion cannot be					
	deleted					
Rank	Order in which the promotion is to be evaluated against website orders					
Activation Date	Date when promotion becomes active. A time may be specified: Defaults to 12:00 AM if					
	blank in refresh or import.					
Deactivation	Date when promotion is no longer active. A time may be specified: Defaults to 12:00 AM if					
Date	blank in refresh or import.					
Description	Internal description of the promotion					





Global Management>Promotions: Rules

	Name	Desc	Details	Rules	Results				
	Big sale Discount	\$300 ofI	_						
	Bike Safety November	Receive	Add	Delete					
	Car Board Discount	50% off		Code	GNAR				
	November Sale	\$50 off		Code					
	October 12		_	Rule Name			Execution Group	Execution Order	Conditio
	Tim	pabts		Promot	tionRuleOrderProductTotalGreaterThan	1		1	AND
	Wilde Promo	\$100 ofl		Promot	tionRuleValidPromotionCode	1		2	AND
ield	Name	D	escrip	otion					
dd	dd Pops up a list of available promotion rules for the selection of a new rule record								
1.	elete Flags a promotion rule for deletion								
relet	e	Γ.	lags a	pron	ionon rule for deletio	11			

Rule Detail	(Code field in above example) Dynamic area, updated per rule selected, for entry of detailed
Area	parameters per promotion rule
Rule Name	Auto-filled with the name of the rule selected in the Add pop-up
Execution	Group sorting number for parenthetical promotion rule set-up
Group	
Execution Order	Order in which rule is to be evaluated against the order, within its execution order and
	Promotion rank
Condition	And/Or dropdown to create parenthetical promotion rule structures

Global Management>Promotions: Results

Result Detail

Result Name

Area

<i>#</i>	Page Size: 200 Ge	t All 1 - 7 of 7					
Global Settings Global Management	Name	Desc	Details Rules	Results			
Users Customers Products Advanced Filtering Orders Subscription Orders	Big sale Discount Bike Safety Nover Car Board Discour November Sale October 12 Tim		Add Delete	Pro	motionResultDollarOffOrder		Result Name
Promotions	Wilde Promo	\$100 ofI					
Field Name Add	Description Pops up a list of	f availal	ole promotion	n results	for the selection	n of a new re	esult record
Delete	Flags a promoti						

Auto-filled with the name of the result selected in the Add pop-up

detailed parameters per promotion result

(Amount field in above example) Dynamic area, updated per result selected, for entry of

s oftware Emails



This is where you can manage transactional emails like Order Confirmations and Notifications. Marketing emails can also be managed here, or subscriber lists can be exported to a third-party ESP.

Global Management>Emails: Details

Subject Line	Details Manage Subscribers	
Contact Us		
Custom Quote Requested	Email Information	
Thank You for Signing Up at Caldre. October 5 test	Subscription Email	
Your Order From Caldrea	Name ContactUsTemplate	
Your Login Request For Caldrea.co	Description Contact Us Email	
	Subject Line * Contact Us	
	From Address	
	Note: If blank, will use 'From' address indicated in Application Settings	
	Content Management	
	Maximize Open HTML Editor Find Replace	
	This is the content.	

Field Name	Description				
Email Informati	on				
Subscription	Flags subscription as requiring an opt-in (like a newsletter), rather than being transactional				
Email	(like an order confirmation). Only if this is TRUE will the Manage Subscribers Tab require				
	administration				
Name	Internal reference name				
Description	Optional short description				
Subject Line	Subject line that will be read by recipients				
From Address	From address that will display to recipients, and to which any replies would be sent				
Content Manage					
Maximize	Maximizes the entire Content Management Area. When maximized, this button will change				
	to "Minimize"				
Open HTML	Opens a pop-up window of the WYSIWYG editor, allowing content updates without				
Editor	requiring HTML codes, image and Flash imports				
Find Replace	Opens a pop-up window allowing single or group search and replace functions of the entire				
	content area				
Content Area	Field used to store the specified content. Default display is HTML, but end-user display may				
	be previewed by opening the HTML Editor				





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Global Management>Emails: Manage Subscribers*

Details Manage Subscribers

View Go To		1	h Available				
bscribed Users				Available Users			
Username	First Name	Last Name		Username	First Name	Last Name	
harry@acme.com	Harry	Oundurlus		andy@acme.com	Andy	Vanders	
phil@acme.com	Phil	Longfellow		bill@smith.com	Tim	Smith	
pete@acme.com	Pete	Formen		doug@acme.com	Doug	Hillborrow	
andy@acme.com	Andy	Vanders		dzins@mac.com	Darwin	Zins	
theo@acme.com	Theo	Pendergrass		gail@acme.com	Gail	Strong	
yol@acme.com	Yolanda	White		greg@acme.com	Greg	Morgan	
InSiteAdmin	InSite	Admin		harry@acme.com	Harry	Oundurlus	
rzins@groupinsite.	Peggy	Zins		importtest@october1	Import	Test	
steve@acme.com	Steve	Williams	Add	InSiteAdmin	InSite	Admin	
greg@acme.com	Greg	Morgan	Remove	larry@acme.com	Larry	Umbuntu	
ted@acme.com	Ted	Stevens	Kemore	mary@acme.com	Mary	Anderson	
bill@smith.com	Tim	Smith		october12	October	Manual	
tim@acme.com	Tim	Morgan		October13	Manual	Entry	
mary@acme.com	Mary	Anderson		October14	First	Last	
susan@acme.com	Susan	Landers		october9	manual	test	
gail@acme.com	Gail	Strong		pete@acme.com	Pete	Formen	
larry@acme.com	Larry	Umbuntu		phil@acme.com	Phil	Longfellow	
steve@steve.com	Steve	Johnson		rzins@groupinsite.coi	Peggy	Zins	
doug@acme.com	Doug	Hillborrow		steve@acme.com	Steve	Williams	
				steve@steve.com	Steve	Johnson	
				susan@arme.rom	Susan	Landers	

Field Name	Description
View	Will pop-up a quick-view window displaying the User Details for the selected,
	Assigned User
Go To	Direct navigation away from Emails, to the User record for the selected Assigned
	User
Search Available	Searches all available Usernames, Emails, First and Last Names. Uses an * for
	wildcard searching
Subscribed Users	Users subscribed to the selected Email
Available Users	Active Users that may subscribe to the Email
Add	Moves one or many Available Users to the Assigned Users field and makes the
	association. Drag-and-Drop may also be used instead of the button.
Remove	Removes one or many Assigned Users associations and sends them back to the
	Available Users field. Drag-and-Drop may also be used instead of the button.
Send Email to All	Generated the HTML formatted email and send it to all subscribers
Subscribed Users	
Export Subscribed	Generates an Excel spreadsheet of all subscribed Users that can be imported to a
Users	third-party ESP





Add All Users toMoves all Users to the Subscribed Users list and associates them to the selected EmailSubscribed Users

Dealers

The **Dealer** records may be used for your site's store or dealer locator, supporting multi-channel shoppers.

Global Management>Dealers: Details

0	Page Size: 200 Get All 1 - 2 of	of 2							0
Global Settings Global Management	Name	Address De	tails Custom Pro	perties					
	and the second	14 West 4tl							
Customers	October 7 7900	10 intl dr D	ealer Information		a).				
Products Orders		_	Name 🌸 Ac	ne Dealer					
Subscription Orders		_		34 West 4th	Phone	612-922-1809			
Promotions				: Billing	Fax	612-922-1809	-		
Dealers		_	City 🔹 Mi State/Prov Mi		URL	http://www.mydea	lersite.com		
Sales Reps		_		410	Latitude	6.121212			
Vendors		- 1		SA 🔹					
			Sector Max						
			ssign Categories						
		_	View Go To			Search Available)		_
		_	Assigned Categories				Available Categorie	s	
			Category	Description	Parent		Category	Description	Parent
		_	Category On	e Category One		Add	Category 34 Category One	October 12 manual t Category One	
		_				Remove	Category Two	Category Two	
		_							
Site Settings Site Management		- 1	1				1		
Field Name	Description								
Dealer Information									
					•, •,	lealer loc	ator Red	mirad	
Name	Dealer/reseller name	me, as it	would ap	pear on a	site's c			lanca	
Name Address 1	Dealer/reseller nat Street address 1	me, as it	would ap	pear on a	site's c			lanca	
			would ap	pear on a	site's c			Junea	
Address 1	Street address 1	dress 2	*	pear on a				Junea	
Address 1 Address 2	Street address 1 Optional street add	dress 2 ocation.	*	pear on a					
Address 1 Address 2 City	Street address 1 Optional street add City of Dealer's lo	dress 2 ocation. I	Required	•					
Address 1 Address 2 City State/Province	Street address 1 Optional street add City of Dealer's lo State of Dealer's 1	dress 2 ocation. 1 location f Dealer'	Required s locatior	•					
Address 1 Address 2 City State/Province Zip/Postal Code	Street address 1 Optional street add City of Dealer's lo State of Dealer's 1 Zip/Postal code of Country of Dealer Telephone number	dress 2 ocation. 1 location f Dealer' r's location r for spe	Required s location on cific Deal	er locatio					
Address 1 Address 2 City State/Province Zip/Postal Code Country	Street address 1 Optional street add City of Dealer's lo State of Dealer's 1 Zip/Postal code of Country of Dealer	dress 2 ocation. 1 location f Dealer' r's location r for spe	Required s location on cific Deal	er locatio					
Address 1 Address 2 City State/Province Zip/Postal Code Country Phone	Street address 1 Optional street add City of Dealer's lo State of Dealer's 1 Zip/Postal code of Country of Dealer Telephone number	dress 2 ocation. location f Dealer' r's locati r for spe te specifi	Required s location on cific Deal	er locatio	n			·	xternal links
Address 1 Address 2 City State/Province Zip/Postal Code Country Phone Fax	Street address 1 Optional street add City of Dealer's lo State of Dealer's 1 Zip/Postal code of Country of Dealer Telephone number Fax number for th	dress 2 location. f Dealer' r's location r for spe le specifi for the D	Required s location on cific Deal ic Dealer Dealer. Ma	er locatio location y be used	n if deal	er locator	r design :	includes e	xternal links
Address 1 Address 2 City State/Province Zip/Postal Code Country Phone Fax URL	Street address 1 Optional street add City of Dealer's lo State of Dealer's 1 Zip/Postal code of Country of Dealer Telephone numbe Fax number for th Optional website f	dress 2 ocation. location f Dealer' c's location r for spe the specifi for the D ker that	Required s location on cific Deal ic Dealer Dealer. Ma may be us	er locatio location y be used sed for a n	n if deal napped	er locator /pinned d	r design lealer loo	includes e cator	xternal links
Address 1 Address 2 City State/Province Zip/Postal Code Country Phone Fax URL Latitude	Street address 1 Optional street add City of Dealer's lo State of Dealer's 1 Zip/Postal code of Country of Dealer Telephone numbe Fax number for th Optional website for Geographical mark	dress 2 ocation. location f Dealer' c's location r for spe the specifi for the D ker that	Required s location on cific Deal ic Dealer Dealer. Ma may be us	er locatio location y be used sed for a n	n if deal napped	er locator /pinned d	r design lealer loo	includes e cator	xternal links
Address 1 Address 2 City State/Province Zip/Postal Code Country Phone Fax URL Latitude Longitude	Street address 1 Optional street add City of Dealer's lo State of Dealer's lo Zip/Postal code of Country of Dealer Telephone number Fax number for th Optional website f Geographical mar	dress 2 ocation. 1 location f Dealer' c's location r for spe the specifi for the D ker that ker that	Required s location on cific Deal ic Dealer Dealer. Ma may be us may be us	er locatio location y be used sed for a n	n if deal napped napped	er locator /pinned d	r design lealer loc lealer loc	includes e cator cator	
Address 1Address 2CityState/ProvinceZip/Postal CodeCountryPhoneFaxURLLatitudeLongitudeAssign Categories	Street address 1 Optional street add City of Dealer's lo State of Dealer's lo Zip/Postal code of Country of Dealer Telephone numbe Fax number for th Optional website f Geographical mar Geographical mar	dress 2 location. f Dealer' f's location r's	Required s location on cific Deal ic Dealer Dealer. Ma may be us may be us	er locatio location y be used sed for a n	n if deal napped napped	er locator /pinned d	r design lealer loc lealer loc	includes e cator cator	
Address 1Address 2CityState/ProvinceZip/Postal CodeCountryPhoneFaxURLLatitudeLongitudeAssign Categories	Street address 1 Optional street add City of Dealer's lo State of Dealer's lo Zip/Postal code of Country of Dealer Telephone number Fax number for th Optional website f Geographical mar	dress 2 location. f Dealer' f's location r's r's location r's r's location r's r's r's r's r's r's r's r's r's r's	Required s location on cific Deal ic Dealer Dealer. Ma may be us may be us window c	er location location y be used sed for a n sed for a n lisplaying	n if deal napped napped the Ca	er locator /pinned d /pinned d tegory D	r design lealer loc lealer loc etails for	includes e cator cator : the selec	ted,





Search Available	Searches all available Category Names and Descriptions. Uses an * for wildcard searching
Assigned	Categories associated with the particular Dealer
Categories	
Available	Active Categories that may be assigned to Dealers
Categories	
Add	Moves one or many Available Categories to the Assigned Categories field and makes the
	association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many Assigned Categories associations and sends them back to the
	Available Categories field. Drag-and-Drop may also be used instead of the button

*May require customized ERP Integration services

Global Management>Dealers: Customer Properties*

N.	Details Custom Properties								
Acme De	10dd Delete								
October '	Name Yalue								
		dasdads							
Field	Description								
Name									
Add	Adds a new Custom Property Record								
Delete	Flags the selected Custom Property for deletion. Delete will execute upon clicking the top Save								
	button								
Name	Name of the individual custom property								
Value	Property value, used to drive customizat	ions							

*Exclusively used for customizations. May require implementation of advanced features.





Global Management>Sales Reps: Details

0	Page Size: 200 Ge	et All 1 - 2 of 2							
Global Settings	Sales Rep Nu	Name	Reference N	Details Content					
Global Management	2	October Test	1						
	5672	Steve Edwards	12345 5	Sales Rep Informa	ition				
Products				Name	Steve Edwards	Sales Rep Number	5672		
Orders				Title	Sales Lead	Code	54587		
Promotions				Phone 1	612-922-1895	Reference Number	12345		
Dealers				Phone 2	612-987-6547		Outside		
Sales Reps				Email	steve@acme.com	Sales Manager	Ted Stevens		
Vendors				Parent Sales Rep	Please Select 🔻	Sales Class	F11		
				Sales Stats					
				Sales Year To Date	\$22:00 Sales Period To Da	te \$10.00			
Field Name	Description	on							
Sales Rep Informati	on								
Name	Sales Rep	's complet	e name						
Title	Optional field for Title/Position								
Phone 1	Primary te	elephone n	umber for S	ales Rep					
Phone 2	Optional additional telephone number								
Email	Primary e	mail addre	SS						
Parent Sales Rep	Sales Prin	ciple or Re	ep Group						
Sales Rep Number	Sales Rep's unique identifier								
Code	Additional classification/grouping field								
Reference Number	Additional classification/reporting field								
Outside Flags Sales Rep as external rather than in-house									
Sales ManagerAdditional Sales Rep grouping field, if different from Parent Sales Rep						р			
Sales Class									
Sales Stats	<u> </u>								
Sales Year To	Auto-gene	erated data	if Sales Re	p Module is	fully integra	ted			
Date	6			L	J - 6				
Sales Period To	Auto-gene	erated data	if Sales Re	p Module is	fully integra	ted			
Date	6			L	J				

*May require implementation of optional Advanced Module and advanced Integration services





Global Management>Sales Reps: Content

content area

be previewed by opening the HTML Editor

Content Area

1	Sales Rep Nu	Name	Details Content							
	2	October Test								
	5672	Steve Edwards	Content Details							
			Image Upload Preview							
		Content Management								
		Maximize Open HTML Editor Find Replace								
			Sales Development Lead							
Fiel	d Name	Descriptio)n							
Con	ntent Details	1								
Ima	ge	Calls out the Sales Rep image								
Upl	oad	Opens a Windows Explorer session, allowing you to browse for an image and upload it to the								
		web server. Commerce supports the following image types: .jpg, .gif, .png								
Prev	view	Opens a pop-up window to preview the associated image								
Con	tent Manag	ement								
Max	kimize	Maximizes the entire Content Management Area. When maximized, this button will change to "Minimize"								
Ope	en HTML	Opens a pop-up window of the WYSIWYG editor, allowing content updates without requiring								
Edit	tor	HTML codes, image and Flash imports								
Fine	d Replace	Opens a po	op-up window allowing single or group search and replace functions of the entire							

Field used to store the specified content. Default display is HTML, but end-user display may

insite software Vendors



Vendor records can be associated with specific products, and can be used to support the particular needs of distributor oriented websites.

Global Management>Vendors: Details

	Page	e Size: 200 (Set All 1 - 2 of 2	2			
Global Settings		he see a	L more r			Details	
Global Management		Vendor N	Name	Ra			
Users		23456 V1234	October 7 Test Acme Vendor	9		Vendor Information	
Customers		1201	Heme yendor	-			
Advanced Filtering						Vendor Number * 23456	
Orders						Name 🔹 October 7 Test	
Subscription Orders						Contact Name	
Promotions						Contact Email	
🗋 Emails						Address 1	
Dealers						Address 2	
Sales Reps				_			
📑 Vendors						City	
						State/Prov	
						Country USA	
						Zip/Postal Code	
						Phone	
						Website	
						Ranking	
						Vendor Message	
ield Name	Description		1	-			
Vendor Number	ERP assign			refe	rend	nce number	
lame	Vendor con	<u> </u>					
Contact Name	Primary Co	±		or			
Contact Email	Primary email address at Vendor						
Address 1	Street address 1						
Address 2	Optional street address 2						
City	City of Vendor's location						
state/Province	State/Province of Vendor's location						
Country	Zip/Postal code of Vendor's location						
Cip/Postal Code	Country of Vendor's location						
hone	Primary telephone number at Vendor						
Website	Optional URL for Vendor						
Ranking	Display ran						
Vendor	Field for op	· •		c site	e m	nessaging	

Message* *May require implementation of optional Advanced Module and/or advanced Integration services





Website Settings is the section where the detailed controls set up in Global Settings can be assigned and activated on a site-by-site basis. All maintenance performed here must be in context of a specific website, as selected from the dropdown menu that will appear at the top of the left-nav.

Assign Countries/States

Add

Remove

This is where the Countries and States/Provinces set up in Global Settings can be assigned on a site-by-site basis.

Website Settings>Assign Countries

TemplateDemo5N 🔹	WebSite Countries							
Global Management								
Website Settings		earch Available						
Assign Countries	Site Countries		Available Countrie	Available Countries				
Assign States	Name	Abbreviation	Name	Abbreviation				
Assign Carriers	USA	USA	Australia	Australia				
	Canada	CAN	Canada	CAN				
			Canada	CANADA				
			China	China				
			France	France				
			Germany	Germany				
			Japan	Japan				
			Mexico	MEXICO				
			Mexico	MEX				
			Netherlands	Netherlands				
			Add New Zealand	New Zealand				
			Remove	Russia				
Field Name	Description		Scotland	Scotland				
bearch	Searches all avail	able Country names and	abbreviations. Uses an	* for wildcard searching				
vailable								
ite Countries	Countries associa	Countries associated with the particular website						
Available	Active Countries	Active Countries that may be assigned to the specific website						
Countries								

Moves one or many Available Countries to the Assigned Countries field and makes the

Removes one or many Assigned Countries associations and sends them back to the Available

association. Drag-and-Drop may also be used instead of the button

Countries field. Drag-and-Drop may also be used instead of the button





Website Settings>Assign States

TemplateDemo5N 🔹	WebSite States							
Global Settings								
Global Management	Se	earch Available						
Website Settings	Site States			Available States				
Assign Countries	Name	Abbreviation		Name	Abbreviation			
Assign Carriers	Minnesota	MN		Alabama	AL			
	California	CA		Alberta	AB			
	New York	NY		Arizona	AZ			
	Alabama	AL		Arkansas	AR			
	Arizona	AZ		British Columbia	BC			
	Colorado	со		California	CA			
	Connecticut	СТ		Colorado	CO			
	Delaware	DE		Connecticut	СТ			
	Florida	FL		Delaware	DE			
	Georgia	GA		District of Columbia	DC			
	Idaho	ID IL	Add	Florida	FL GA			
	Indiana	IN	Remove	Georgia Idaho	ID			
Field Name	Description							
Search	Searches all availab	le State names and abbi	reviations. Uses a	an * for wildcard	searching			
Available					6			
Site States	States associated with the particular website							
Available	Active States that m	ay be assigned to the sp	pecific website					
States		• • •	-					
Add	Moves one or many Available States to the Assigned States field and makes the association.							
	Drag-and-Drop may	also be used instead of	f the button					
Remove	Removes one or many Assigned States associations and sends them back to the Available States							
		p may also be used inst						





This is where the Shipping Carriers set up in Global Settings can be assigned on a site-by-site basis.

Website Settings>Assign Carriers

Global Settings	WebSite Shipping			
Global Management	View Go To	Search Available		
Website Settings			Available Carriers	
Assign Countries	Site Carriers		Available Carriers	
Assign States	Name	Description	Name	Descriptio
👗 Assign Carriers	FedEx	FedE×	FedEx	FedEx
			UPS	UPS
			Add	
			Remove	

Field Name	Description					
View	Will pop-up a quick-view window displaying the Details for the selected, Assigned Carrier					
Go To	Direct navigation away from Site Settings, to the Carrier record for the selected Assigned					
	Carrier					
Search	Searches all available Carrier names and descriptions. Uses an * for wildcard searching					
Available						
Site Carriers	Carrier(s) associated with the particular website					
Available	Active Carriers that may be assigned to the specific website					
Carriers						
Add	Moves one or many Available Carriers to the Assigned Carriers field and makes the					
	association. Drag-and-Drop may also be used instead of the button					
Remove	Removes one or many Assigned Carrier associations and sends them back to the Available					
	Carriers field. Drag-and-Drop may also be used instead of the button					





This is the area for day-to-day management of site-specific content. All maintenance performed here must be in context of a specific website, as selected from the dropdown menu that will appear at the top of the left-nav.

Web Pages

These are the three types of content managed areas that you can maintain via the integrated HTML Editor. **Web Pages** are the fully content-managed, copy-heavy pages of your site, such as About Us and FAQs. **Web Page Contents** are the broken-out sections of other pages that have a mix of dynamic content and manually-managed copy, such as a frame on the home page highlighting a new product launch or promotion. The **News/Articles** section is for managing the specially formatted PR/In The Media pages.

Website Management>Web Pages:Details

TemplateDemoSN 🔹 🗿	Page Size: 200 Get All 1 - 5 of 5					
Global Settings	I way a I way want a	1	Details			
Global Management	Name Description	Title	Decails			
Website Settings Website Management	AboutUs	About Us		În sur		
Veb Pages	CategoryNotFound	Product Category Not For FAOs	Page Name	AboutUs		
Web Pages	PrivacyPolicy	Privacy Policy	Title	About Us		
Web Page Contents	ProductNotFound	Product Not Found	Description	1		
News / Articles			Meta Description			
Categories						
Assign Web Cross Sells			Meta Keywords			
Assign Promotions						
			Content Mana	gement		
			Maximize	Open HTML Editor	Find Replace	
					·	
			The category.<td></td><td>o everything. Every hit, every jib, every rur</td><td>n, every day. Here at DragonFeet, we take a unique approach to</td>		o everything. Every hit, every jib, every rur	n, every day. Here at DragonFeet, we take a unique approach to
				ojoht="461" ave="/i leavEilae/	Images/fwk-solomon-fig06_004.jpg" width=	"4E0" 1~ -1~~
			Sing at-	eight= 461 src= (osernies)	mages/rwk-solomon-rigue_oo+.jpg_waan=	
Field Name	Description					
Details	·					
Page Name	Specific page name.	May be used	d on menu	15		
Title	Page title to display	at ton brows	er Displa	vs in the C	ontent Managed	navigation as the page
Title		-	-	.ys in the c	ontent Munugeo	nuvigution us the puge
	title. SEO friendly. I	$_1$ mited to $/_2$	2 char			
Description	General description	1 0				
Meta	Description to displa	ay on SRPs.	SEO frien	dly. Limite	ed to 185 char	
Description	1 1	5		5		
Meta Keywords	Meta Tags or Keyw	ords for SEO	/SEM			
Content Managen	0 7		/ DLIVI			
Ŭ		<u> </u>				.1 . 1
Maximize	Maximizes the entir	e Content Ma	anagemer	it Area. WI	hen maximized,	this button will change
	to "Minimize"					
Open UTMI		dow of the W	www	Gaditor	llowing contant	undates without
Open HTML	Opens a pop-up win				nowing content	updates without
Editor	requiring HTML co	des, image ai	nd Flash i	mports		
Find Replace	Opens a pop-up win	dow allowin	g single o	r group sea	arch and replace	functions of the entire
i ma replace		as w uno win	5 511510 0	- Stoup bet	i en una repluce	
	content area					
Content Area	Field used to store the	ne specified of	content. D	efault dist	lay is HTML, b	out end-user display
	may be previewed b	-		-	· , ·	1 2
	may be previewed b	y opening th		Lanoi		



Website Management>Web Page Contents: Details

TemplateDemoSN 🔹	Page Size: 200 Get All 1 - 29 of 29
Global Settings	Name Page Title Details
Global Management Website Settings	AccountSettings_TopConb
Website Management	BillingAddress Page Name HomePage_FeaturedCategory1
🔻 🗁 Web Pages	ContactUs_RightSideConte Page Title
🗋 Web Pages	ContactUs_TopContent Content Title HomePage_FeaturedCategory1
Web Page Contents	HomePage_FeaturedCates Meta Description
Categories	HomePage_FeatureUCate
Assign Web Cross Sells	HomePage_FeaturedCate(Meta Tags
Assign Promotions	HomePage_FeaturedProd.
	HomePage_NewsAndEven Content Management
	HomePage_PrimaryImage
	HomePage_Promotion ManageAddress_TopContr My Account: Address Mane =
	ManageWishList_TopContx
	OrderAddress_TopConten chi2>
	OrderConfirmation_TopCo Snow Sports >
	OrderHistory_TopContent OrderSummary_BottomCore
Field Name	Description
Details	
Page Name	Page section name. Called out in adding section to construction of total page, so names
	should not be changed
Page Title	Page title to display when required. SEO friendly. Limited to 72 char
Content Title	Page title to display at top browser. SEO friendly. Limited to 72 char
Meta	Description to display on SRPs. SEO friendly. Limited to 185 char
Description	
Meta Keywords	Meta Tags or Keywords for SEO/SEM
Content Managen	nent
Maximize	Maximizes the entire Content Management Area. When maximized, this button will change
	to "Minimize"
Open HTML	Opens a pop-up window of the WYSIWYG editor, allowing content updates without
Editor	requiring HTML codes, image and Flash imports
Find Replace	Opens a pop-up window allowing single or group search and replace functions of the entire
	content area
Content Area	Field used to store the specified content. Default display is HTML, but end-user display
	may be previewed by opening the HTML Editor
L	





Website Management>News/Articles: Details

B2BDemo 🔻	Page Size: 30 Get All 1 - 0 of 0
Global Settings	Title Article Date Details
Global Management Website Settings	Title Article Date Details
Website Management	isActive
🔻 🗁 Web Pages	Title
Web Pages	
Web Page Contents	Description
News / Articles	News Article Date 03/03/2010 III 12:00 AM V
Categories	Publish Date 03/03/2010 III 12:00 AM V
Assign Promotions	Small Image Upload Preview
	Large Image Upload Preview
	Content Management
	Maximize Open HTML Editor Find Replace
	This is the content
Field Name	Description
Is Active	Flags article as active, to be displayed in the specially formatted section
Title	Article or publication title to display on webpage
Description	Short description to display with title
Article Date	Specific date of article. A time may be specified: Defaults to 12:00 AM if blank in refresh or
	import.
Publish Date	Publication date, if different from Article Date. A time may be specified: Defaults to 12:00
	AM if blank in refresh or import.
Small Image	Calls out the small image of the article. Often a cover shot
Path	
Large Image	Calls out the large image of the article. Often an image of the full article
Path	
Upload	Opens a Windows Explorer session, allowing you to browse for an image and upload it to the
	web server. Commerce supports the following image types: .jpg, .gif,.png
Preview	Opens a pop-up window to preview the associated image
Content Manage	
Maximize	Maximizes the entire Content Management Area. When maximized, this button will change
	to "Minimize"
Open HTML	Opens a pop-up window of the WYSIWYG editor, allowing content updates without
Editor	requiring HTML codes, image and Flash imports
Find Replace	Opens a pop-up window allowing single or group search and replace functions of the entire
r ····	content area
Content Area	Field used to store the specified content. Default display is HTML, but end-user display may
	be previewed by opening the HTML Editor





Categories are the product classifications and groupings that drive your website's navigation. While the product catalog is global, categories are site specific. All products are assigned to their respective categories, helping shoppers find exactly what they're looking for.

Website	Managemen	t>Categories	s: Details
WOBIC	managemen	u> Categorie.	5. Details

B2BDemo 🔹 🔍	Page Size: 30 Get All 1 - 10 of 10
Global Settings	Details Content Assign Pro Cross Sell Specificati Custom Pr Restrictions
Global Management	Name
Website Settings Website Management	Ancillary Sales
Website Management	Apparel Name * Ancillary Sales
Web Pages	Boots Short Description * Ancillary Sales
Web Page Contents	Bulk Boards Parent Category Choose Parent V
News / Articles	GlovesandMittens
Categories	Goggles Deactivation Date
Assign Web Cross Sells	HatsandHeadbands
Assign Promotions	Tuning Supplies Sort Order 0
	Waxing Tools ERP Product Values Comma separated list of product codes. Product to map to this category.
Field Name	Description
Name	Product Category name. Generally displayed in website menus
Short Description	May be used as browser page title
Parent Category	Dropdown of all Categories. Leave blank if Category is a Parent itself
Active	Date when Category is activate. A time may be specified: Defaults to 12:00 AM if blank in
	refresh or import.
Deactivation Date	Date when Category is no longer active. A time may be specified: Defaults to 12:00 AM if
	blank in refresh or import.
Sort Order	Order in which Category will display within any Parent Category assignments
ERP Product	Comma separated list of products assigned to Category. Optional field facilitating imports
Values	and/or integrations





Website Management>Categories: Content I

	Active	Details	Content	Assign Products	Cross Sell	Specifications	Custom Properties	Restrictions			
Category 34	Tue Oct 13 07:43:17 6	_									
Category One	:00 GMT-0600 2009	Conten	Content Details								
Category Two	Sat Oct 10 16:42:28 G	Small	Image Path	/Images		Upload	/iew				
		Large	Image Path	/images/category/wood	lfurn.jpg	Upload	/iew				
		Conten	t Manageme	nt							
		Max	ximize (Open HTML Editor	Find Replace	e					
		This is	the content.		27						
		1									
		Denum									
		Docum	ent Manager								
		Docum	ent Manager Name		iption	File Name	Туре	Creation Date			
		Docum	_	Descr	15000000 I	File Name		Creation Date Thu Sep 17 19:22:18 Gf			
		Docum	Name	t new docum	ment	a contraction of the second second					
		Docum	Name new documen	t new docum	ment	InSiteCommerce Integra	atic pdf	Thu Sep 17 19:22:18 GM			
		Docum	Name new documen	t new docum	ment	InSiteCommerce Integra	atic pdf	Thu Sep 17 19:22:18 GM			
		Docum	Name new documen	t new docum	ment	InSiteCommerce Integra	atic pdf	Thu Sep 17 19:22:18 GM			
		Docum	Name new documen	t new docum	ment	InSiteCommerce Integra	atic pdf	Thu Sep 17 19:22:18 GM			

Field Name	Description
Content Details	Section
Small Image	Calls out the small image of the Category
Path	
Large Image	Calls out the large image of the Category
Path	
Upload	Opens a Windows Explorer session, allowing you to browse for an image and upload it to the
	web server. Commerce supports the following image types: .jpg, .gif,.png
Preview	Opens a pop-up window to preview the associated image
Content Manag	ement Section
Maximize	Maximizes the entire Content Management Area. When maximized, this button will change
	to "Minimize"
Open HTML	Opens a pop-up window of the WYSIWYG editor, allowing content updates without
Editor	requiring HTML codes, image and Flash imports
Find Replace	Opens a pop-up window allowing single or group search and replace functions of the entire
	content area
Content Area	Field used to store the specified content. Default display is HTML, but end-user display may
	be previewed by opening the HTML Editor
Document Man	
Add	Pops up a browser session so a new document can be added to the Product
Delete	Flags the document record for deletion
Name	Document name
Description	Document description, displays on website
Path	File manager/web server data storage path





Meta Description

Meta Keywords

File Name	File name if different from general document name
Creation Date	Date when document was added/upload

Website Management>Categories: Content II

Meta Data	
Page Title	
Meta Description	
Meta Keywords	
Field Name	Description
Meta Data Section	
Page Title	Page title to display at top browser. SEO friendly. Limited to 72 char

Description to display on SRPs. SEO friendly. Limited to 185 char

Meta Tags or Keywords for SEO/SEM



Website Management>Categories: Assign Products

Name		Details (ontent Assig	In Products Cro	ss Sell Sp	ecifications	Custom Prope	Restrictions	
Ancillary Sales	*								
Apparel				Search Available					
Board Accessories		Products in Cat	egory		Available Products				
Boots		Name	Short D	esc.		Name	Short	: Desc.	
Bulk Boards		STP357	9510 Stomp P	əd					
GlovesandMittens		STP357	9509 Stomp P	ad, 12 pk					
Goggles		HWM79	1346 Hand Wa	armer					
HatsandHeadbands		HWM79	1345 Hand Wa	armer, 2 pk		_			
Tuning Supplies		HWM79	1344 Hand Wa	armer, Retail display 24					
Waxing Tools		DFBA55	555 DragonF	eet Fleece Buff					
		DFBB55	555 DragonF	eet Fleece Buff, Retai					
		GCBA44	444 Glove Ca	ats, Black					
		GCBB44	444 Glove Ca	ats, Black, 24 pk					
		GWP23	2323 Anti-Fog	Goggle Wipes	Add				
					Remove				

Field Name	Description
View	Will pop-up a quick-view window displaying the Product Details for the selected, Assigned
	Product
Go To	Direct navigation away from Categories, to the Product record for the selected Assigned
	Product
Search	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for
Available	wildcard searching
Products in	Products associated with the particular Category
Category	
Available	Search results from Search Available function of Products that may be assigned to Categories
Products	
Add	Moves one or many Available Products to the Assigned Products field and makes the
	association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many Assigned Products associations and sends them back to the Available
	Products field. Drag-and-Drop may also be used instead of the button

*May require integration customizations





Website Management>Categories: Cross Sell

Name	1 🔺		Detail	s Content	Assign Products	Cros	s Sell Spec	cifications	Custom Prop	e Restrictions
Ancillary Sales	*	1								
Apparel					Search Ava	ilable				
Board Accessories			Product	s Cross Sold on Ca	ategory			Available Produ	ucts	
Boots				Name	Short Desc.			Name	si	ort Desc.
Bulk Boards										
GlovesandMittens						_				
Goggles										
HatsandHeadbands						_				
Tuning Supplies										_
Waxing Tools						_				
						_				_
						_	Add			
							\square			
							Remove			

Field Name	Description
View	Will pop-up a quick-view window displaying the Product Details for the selected,
	Assigned Cross-Sold Product
Go To	Direct navigation away from Categories, to the Product record for the selected Assigned
	Product
Search Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an *
	for wildcard searching
Products Cross Sold	Products associated with the particular Category
on Category	
Available Products	Search results from Search Available function of Products that may be cross-sold to
	Categories
Add	Moves one or many Available Products to the Assigned Products field and makes the
	association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many Assigned Products associations and sends them back to the
	Available Products field. Drag-and-Drop may also be used instead of the button

*May require integration customizations





Website Management>Categories: Specifications

Name	Active	Details	Content	Assign Products	Cross Sell	Specifications	Custom Properties	Restrictions	
Category 34	Tue Oct 13 07:43:17 6								
🧹 Category One	:00 GMT-0600 2009	Add	Delete						
Category Two Categ	Sat Oct 10 16:42:28 G		Name	Value Image:	Sort Order	Sort Order Name Description Value Content f	Active	ditor Find Replace	
Field Name	Description	on				m			
Add	Creates a p	new cate	egory sp	pecific speci	fication r	record			
Delete	Flags a sel	lected sp	pecifica	tion for dele	tion				
Active	Flags spec	ification	1 as acti	ve					
Sort Order	Order in w with the sa		1	ication is di	splayed a	mongst any	v other specif	ications associated	
Name	Specificat	ion nam	e						
Description	General de			ecification					
Value		ield if sj	pecifica	tion is a sim	ple name	e:value pair	, rather than 1	more detailed content	
Content Manage	ement								
Maximize	Maximize to "Minim		tire Con	itent Manag	ement Aı	rea. When r	naximized, th	is button will change	
Open HTML Editor				of the WYS mage and Fl			ing content u	pdates without	
Find Replace	1 0	op-up w		<u> </u>	L		and replace f	unctions of the entire	
Content Area		Field used to store the specified content. Default display is HTML, but end-user display may be previewed by opening the HTML Editor							





Website Management>Categories: Custom Properties

	Name	Active	Deta	ails Content	Assign Products	Cross Sell	Specifications	Custom Properties	Restrictions
1	Category 34	Tue Oct 13 07:43:17 0	_						
1	Category One	:00 GMT-0600 2009	Ad	d Delete					
	Category Two	Sat Oct 10 16:42:28 G			Name			¥alue	
			1	DisplaySpecDrawi	ng	TRUE			
			+	new		new			
Fiel	d	Description							
Nan	ne								
Add Adds a new Custom Property Record									

Delete	Flags the selected Custom Property for deletion. Delete will execute upon clicking the top Save
	button
Name	Name of the individual custom property
Value	Property value, used to drive customizations

*Exclusively used for customizations. May require implementation of advanced features.

Website Management>Categories: Restrictions

Name	Active	Detai	ls Content	Assign Products	Cross Sell	Specifications	Custom Properties	Restrictions
Category 34	Tue Oct 13 07:43:17 6	-						
Category One	Sat Jan 24 06:00:00 G	Add	Delete					
Category Two	Sat Oct 10 16:42:28 G		Name	Sta	te			Is Active
		÷	new restriction	Ala	bama	•		

Field	Description
Name	
Add	Creates a new restriction record on the selected Product
Delete	Flags a selected restriction record for deletion
Name	Name of the particular restriction
State	Dropdown selector for State from which the Product Category is restricted
Is Active	Flags restriction as active, limiting product availability

* May require customizations.





Web Cross Sells is where you can assign up-sells and featured products to appear on a content managed page or during the checkout process, depending on your specific website design. Additional cross-sell opportunities are available on individual products and categories, and are managed on those respective sections of the Management Console.

TemplateDemoSN 🔹	G WebSite Cross Sells				
Global Settings					
Global Management	View Go To	Search Available			
Website Settings Website Management	Assigned Products			Available Products	
🔻 🗁 Web Pages	Name	Short Description		Name	Short Description
Web Pages	+ DCD-100-SP	Frame Rail			Product Four Rev test
Web Page Contents				4600-1	Hinge, Manhead Assembly, 30"
News / Articles				9-331-065-147	Housing Black
🗋 Categories				ADD-200-5	Machined Casting
🛅 Assign Web Cross Sells				BBA10WB	Ski Boot, Black
Assign Promotions				BBA11MB	Ski Boot, Gray
				BBA11WB	Ski Boot, Blue Hauer Bike
				BKH9456 BKK7894	King L Bike
				BK58945	Sutherland Bike
			Add	CAT-300-5CR-5	Junction Plug
				DCD-100-SP	Frame Rail
			Remove	DCD-200-M	Multi-Level Frame Assembly
Go To	Product Direct navigation a Sell	away from selected Cates	gory, to the Pr	oduct record for	the selected Cross
Search		ble Product Names, ERP	Numbers and	Short Description	ons Uses an * for
Available	wildcard searching		i vuino ers une		
Assigned	Cross Sold Produc	ts that display on the sele	ected Category	y detail page	
Products					
Available	Active Products th	at may be assigned as Cr	oss Sells		
Products		···· -···· j · · · ···· · ···			
Add	Moves one or man	y Products to the Assign	ed Products fi	eld and makes th	e Cross Sell
	association. Diag-	and-Drop may also be us	ed instead of t		
Remove		and-Drop may also be us any Cross Sell association			Available Products

Website Management>Assign Web Cross Sells





Promotions created in Global Management can be assigned here, on a site-by-site basis.

TemplateDemoSN 🔹 💿	Assign Promotions						
Global Settings Global Management	View Go To	Search Available					
Website Settings Website Management	Site Promotions	Scarch Available			Available Promotions		
🔻 🗁 Web Pages	Name	Active	Deactivate	_	Name	Active	Deactivate
🗋 Web Pages	November Sale	Mon Nov 2 11:00:00 GMT-0600 2009	Fri Jan 1 12:00:00 GMT-0600 2010		Big sale Discount	Sun Nov 1 05:00:00 GMT-0600 2009	Mon Nov 30 06
🗋 Web Page Contents					Bike Safety November	Mon Nov 2 17:00:00 GMT-0600 2009	Mon Nov 30 06
News / Articles				-	Car Board Discount November Sale	Sun Nov 1 23:00:00 GMT-0600 2009	Tue Nov 3 06:0
Categories					October 12	Mon Nov 2 11:00:00 GMT-0600 2009 Tue Oct 13 02:16:41 GMT-0500 2009	Fri Jan 1 12:00 Sun Nov 1 11:0
Assign Promotions					Tim	Fri Jun 26 08:00:00 GMT-0500 2009	Sun Jan 10 00:0
					Wilde Promo	Sun Nov 1 23:00:00 GMT-0600 2009	Tue Nov 3 06:0
				Add			
				Remove			
ield Name	Description						
View		quick-view windo	ow displaying th	ne Prom	notion Details	s for the selected,	
	Assigned Pror	notion					
Бо То			ected Category	to the	Promotion re	cord for the selected	he
JU 10			iceled Calegory	, to the		cold for the select	Ju
	Assigned Pror						
earch Available	Searches all a	vailable Promotion	n names and Ac	tive and	d Deactivatio	n dates. Uses an *	for
	wildcard searc	0					
Assigned	Promotions th	at are active on th	e selected webs	ite			
romotions							
vailable	A ativa Drama	tions that may be	ottophad to the	maaifia	dwahaita		
	Active Promo	tions that may be	attached to the s	specifie	u website		
romotions							
Add	Moves one or	many Promotions	to the Assigned	d Prom	otions field a	nd makes the assoc	iation.
		p may also be use	-				
Remove	-	or many Promotic				k to the Available	
		eld. Drag-and-Dro					
	1 IOIIIOUOIIS II	cia. Diag-alla-Dio	'p may also be t	iscu ms		atton	

Website Management>Assign Promotions





Credit Card Processing

The Commerce Credit Card Processing module integrates with your chosen payment gateway, supporting secured processing of delayed captures, credits and suchlike.

Financial>Credit Card Processing: Details

4	Page Size: 200	Get All 1 - 25	of 25				
Global Settings	1 Column 1	Transac	Denult	Details			
Global Management Website Settings	Open	A A	Result	betans			
Website Management	Open	A	0	Capture Void	Credit		
Financial	Open	A	0	Credit Card Transac	tion Details		
Credit Card Processing	Open	A	0		1		
Gift Cards	Open	A	0	Status	Open	Transaction Type	Authorization
	Open	A	0	Result	0	Transaction Date	Fri Nov 6 09:07:19 GMT-0600 2009
	Open	A	0	Order Number 🔹	W000485	Authorization Code	1234
	Open	A	0	Customer Number 🔹	Web000258	Origination ID	
	Open	A	0	Shipment Number		PN Ref	
	Open	Α	0	Name 🔹	Yanaba N Alfonso	Request ID	1234
	Open Open	A	0	Amount 🔹	495	AVS Address	
	Open	A	0	Bank Code	U01	AVS Zip	
	Open	A	0	Site		CVV2 Match	
	Open	A	0	Response String			
	Open	A	0				
	Open	A	0	Response Text			
	Open	A	0				
	Open	A	0				
Field Name	Descriptio	n					
Capture	-		apture. B	utton will not	appear if no	t applicable	
Void			-		ot applicable	**	
Credit				* *	not applicabl		
Status	Transaction	ı status					
Result	Payment ga	ateway	specific t	ransaction re	sult code		
Order Number						d via navigation	n from Global
	Manageme			J			
Customer Number	Ŭ			n applies to. N	May be auto-f	filled via navig	ation from Global
	Manageme			11	5	U	
Shipment Number	Optional sh			eld			
Name		-		l at checkout			
Amount	Transaction	n dollar	amount				
Bank Code	Optional ba	ank cod	e tracking	g field			
Site	+ +			implementa	tions		
Transaction Type	_			olicable trans			
Transaction Date	Date of eac		<u> </u>		· J I		
Authorization				authorization	code		
Code			I				
Origination ID	Payment G	ateway	specific	origination co	ode		



PN ref	Payment Gateway specific reference code
Request ID	Payment Gateway specific request code
AVS Address	Optional field for additional address validation
AVS Zip	Optional field for additional address validation
CVV2 Match	Optional field for additional CVV2 validation
Response String	Payment Gateway specific response
Response text	Payment Gateway specific response

s of t w a r e Gift Cards*



The Gift Cards module supports the integration of multi-channel gift certificate purchases and redemptions.

Financial>Gift Cards

0	Page Size: 200 Get All 1 - 1 of 1
Global Settings Global Management	Gift Card Num Order Number Purchase Date Details
Site Settings	123456987 06/06/2009
Site Management Financial	Gift Card Details
Credit Card Processing	Gift Card Number ≱ 123456987
Gift Cards	Order Number First Name Tim
Price Matrix	Amount * 120.00 Last Name Morgan
	Balance * 110.00 Email tim@acme.com
	Purchase Date 06/06/2009
	Expiration Date 07/31/2009
	Gift Card Redemption
	Transaction Date Amount
	07/07/2009 \$10.00
Field Name	Description
Gift Card Details	
Gift Card	Unique card/certificate ID
Number	
Order Number	Number of order on which Gift Card was purchased
Amount	Original amount of Gift Card
Balance	Current, automatically calculated balance, subtracting all redemptions from the original
	amount
Purchase Date	Date upon which Gift Card order was placed
Expiration Date	Date when Gift Card will expire, if applicable
Active	Flags record as an active Gift Card, eligible for redemption
First Name	First Name of the Gift Card recipient
Last Name	Last Name of the Gift Card recipient
Email	Email address for the Gift Card recipient
Gift Card Redempt	tion Table
Transaction Date	Date when any or all of the value of the Gift card is used as a payment method against an
	order Dollar value redeemed on the selected transaction date

*May require implementation of optional Advanced Module and/or advanced Integration services

s of t w a r e



Financial>Price Matrix: Details

Global Settings	Details
Global Management Site Settings	Price Matrix Details
Site Management Financial	
Credit Card Processing	Record Type Customer/Product Product DCD-300-OR Active 01/01/2008 12:00 AM Customer DALTON::Dalton Manufacturing Drew-Hardy Nancy V
Gift Cards	Deactivation Date 12/31/2009 12:00 AM V
	Currency Code USD
	Unit of Measure EA
	Warehouse EVN
	Calculation Flags
	Pricing Details
	Break Qty 1 0 Price Basis 1 List Adjustment Type 1 Amount 1 0 Alt. Amount 1
	Break Qty 2 0 Price Basis 2 List Adjustment Type 2 Amount 2 0 Alt. Amount 2
	Break Qty 3 0 Price Basis 3 List 💌 Adjustment Type 3 Amount V Amount 3 0 Alt. Amount 3
	Break Qty 4 0 Price Basis 4 List Adjustment Type 4 Amount 4 0 Alt. Amount 4
	Break Qty 5 0 Price Basis 5 List V Adjustment Type 5 Amount V Amount 5 0 Alt. Amount 5
	Break Qty 6 0 Price Basis 6 List Adjustment Type 6 Amount Amount Amount 6 0 Alt. Amount 6 Break Qty 7 0 Price Basis 7 List Adjustment Type 7 Amount 7 0 Alt. Amount 7
	Break Qty 7 0 Price Basis 7 List Adjustment Type 7 Amount V Amount 7 Alt. Amount 7 Break Qty 8 0 Price Basis 8 List Adjustment Type 8 Amount V Amount V Amount 8 Alt. Amount 8
	Break Qty 9 0 Price Basis 9 List V Adjustment Type 9 Amount V Amount 9 0 Alt. Amount 9
	Break Qty 10 0 Price Basis 10 List V Adjustment Type 10 Amount 1 V Amount 10 0 Alt. Amount 10
Tools Reporting	Break Qty 11 n Price Rack 11 Liet 🗸 Adjustment Tyne 11 amount I v Amount 11 n Alt. Amount 11 V
Field Name	Description
Price Matrix Details	
Record Type	11 record types are available for price calculations. Please see separate index for list of
	all
Active	Date when price calculation is activated. A time may be specified: Defaults to 12:00 AM
	if blank in refresh or import.
Deactivation Date	Date when price calculation is no longer valid. A time may be specified: Defaults to
	12:00 AM if blank in refresh or import.
Currency Code	Base currency of selected pricing calculation
Unit of Measure	Unit to which price calculation applies, such as each, pack, etc.
Warehouse	Specific product warehouse to which pricing applies
Calculation Flags	Field for additional calculation triggers if needed for customizations
Product Price	Product grouping option
Category	
Customer	Specific Customer to which pricing applies
Pricing Details	
Break Qty 1 – 11	Up to 11 break quantities are available for price calculations
Price Basis 1 – 11	Up to 11 price bases are available for price calculations. Please see separate index for list
	of all
Adjustment Type 1	Flags the specified price adjustment as either Amount or Percentage based
Adjustment Type 1 – 11	Flags the specified price adjustment as either Amount or Percentage based
-11	Flags the specified price adjustment as either Amount or Percentage based Dollar amount or Percentage to use for the specified adjustment calculation Alternate Adjustment Amount field if needed for customizations*





*Some constructs may require advanced Integration services





Batch Processor

While the Commerce and ERP integration process is automated, the **Batch Processor** allows you to run unscheduled updates and tasks, keeping all your data fully in synch and supporting back-up submission in case of system outages. Refreshes must be executed in a particular order, as per implementation specific guidelines.

Tools>Batch Processor

٠	
Global Settings	
Global Management Website Settings	ERP Refresh Options
Website Management	Refresh your Commerce Database with the following information from your ERP
Financial	
Tools	
Batch Processor	Refresh Customers Refresh Shipments Refresh Invoices Refresh Products
File Manager	Refresh Pricing
Application Logs	
Affiliates	Resubmit Orders
Application Dictionary	
About	ReSubmit your Epicor Commerce orders to your ERP
	ReSubmit All Orders Enter Batch Number ReSubmit Order Batch
	Send Emails
	Send batch confirmation emails to your customers
	Send Order Confirmations Send Shipment Confirmations
	Purge Orders
	Purge saved orders from your Epicor Commerce Database
	Purge Orders
	Subscriptions
	Cash ChailWay
	Create Subscriptions
Field Name	Description
ERP Refresh Options	
Refresh All	Manually executes the entire integration service
Refresh Customers	Manually synchs Customer records between Commerce and the ERP
Refresh Pricing	Manually synchs Pricing records between Commerce and the ERP
Refresh Sales Reps*	Manually synchs Sales Rep records between Commerce and the ERP
Refresh Shipments*	Manually synchs Shipment records between Commerce and the ERP
Refresh Inventory	Manually synchs Inventory records between Commerce and the ERP
Refresh Invoices*	Manually synchs Invoice records between Commerce and the ERP
Refresh Orders	Manually synchs Order records between Commerce and the ERP
Refresh Products	Manually synchs Product records between Commerce and the ERP
Refresh Pricing	Manually synchs Price Matrix records between Commerce and the ERP
Resubmit Orders	



Resubmit All Orders	Searches Commerce database for any orders that have not been submitted and pushes
	them to the ERP. May be used as a back-up during ERP outages
Resubmit Order Batch	Resubmits a select group of orders. Batch numbers may be found on the Order Detail
	record
Send Emails	
Send Order	Manually sends a batch of Order Confirmation emails (as maintained in Global
Confirmations	Management>Emails) to all submitted orders that have not yet received them
Send Shipment	Manually sends a batch of Shipment Confirmation emails (as maintained in Global
Confirmations*	Management>Emails) to all shipped orders that have not yet received them
Purge Orders	Deletes saved orders as per pre-existing parameters
Create Subscriptions*	Creates subscription orders as per pre-existing parameters

*May require implementation of optional Advanced Module and/or advanced Integration services





Scheduled tasks are the timed functions that manage the integration service between the website and the ERP. This screen allows you to view the execution of these tasks.

Tools>Scheduled Tasks

	0	Page	s Size: 30 <	Get All > 1 - 30 of 102	0
Global Settings			Details		
Global Management			Decails		
Website Settings Website Management			Scheduled Task D	etails	
Financial			_		
Tools			Туре	RefreshInvoices v	
Batch Processor			Parameter		
Scheduled Tasks					
File Manager					
Application Logs					
Affiliates					
About	·/		Run Date	09/24/1900 III 12:00 AM V	
			Minute Interval		
			Is Real Time		
			Return Action	ExecuteTask 🔹	
			Last Run Date	11/04/2009 5:56 PM	
			Last Finish Date		
			Results		
	_				
	_				
	1				
Field	Descrip	tio	n		
Name					
Type*	Task typ	be	selector. C	ptions include: RefreshCustomers, RefreshPricing, RefreshCustomerOrders,	,
• •	Refresh	Pro	oducts. Re	freshInvoices,RefreshSalesmen, RefreshShipments,RefreshResellers,	
				reshInventory, SubmitOrders, ResubmitOrders, ExecuteQuery,	
				SystemPause	
Parameter		-		if needed to execute the task	
Run Date			,	may be scheduled to run, for date-driven functions	
Minute	Timing,	in	minutes, o	of how frequently the task is scheduled to run	
Interval					
Is Real	If flagge	ed,	shows that	t implementation of the select task/query is to run real-time	
Time					
Return	The inte	end	led result c	of the selected task: ExecuteTask or ReturnDataSet	
Action					
Last Run	The last	da	te and tim	e the selected task began running	_
Date					
Last Finish	The last	da	te and tim	e the selected task was completed	
Date				L	
Results	Optiona	l re	esults of ta	sk, such as a returned data set from a query	
	• •				

*May require implementation of optional Advanced Module and/or advanced Integration services

s of t w a r e



The File Manager facilitates single or batch uploads of images and documents to your web server.

Tools>File Manager 0 Delete Selected Global Settings 🔻 🗁 UserFiles Global Management Uploads Files Website Settings File Size Website Management 🔻 🗁 Images 🔻 📩 Category Financial Tools 📄 145manualBlender.jpg Batch Processor Ancillary Sales.jpg Cheduled Tasks 📄 Apparel.jpg 🛅 File Manager 📄 bike 1 md. jpg Application Logs 📄 bike beauty.jpg 📄 Board Accessories.jpg Affiliates Application Dictionary 📄 Bulk Boards.jpg 📄 About 📄 gogglesig. jpg 📄 grenadeteamgloves.jpg iStock_000002933966XSmall-cat.jpg iStock_000003920176Xmed.jpg iStock_000003920176XSmall-cat.jpg iStock_000004276245Xmed.jpg Distock_000004345913Xmed.jpg iStock_000006213988Xmed.jpg iStock_000006213988XSmall-cat.jpg iStock_000007358151Xmed.jpg iStock_000007358151XSmall-cat.jpg iStock_000008433244Xmed.jpg iStock 000008433244XSmall-cat.jpg snowsports1.JPG 🔻 🗁 Products Upload Directory: UserFiles - Sub Directory: 🗋 145manualBlender.jpg 📄 145RedBike.jpg 😧 🐟 Upload **Field Name** Description Uploaded Files List **Delete Selected** Will delete a highlighted file from the web server **UserFiles** Master directory for all uploads Directory Files Subdirectory Folder for storing document files such as: .doc, .docx, .pdf, .txt Flash Subdirectory Folder for storing media files such as: .swf, .mp3, .mov, .wmv Folder for storing image files such as: .jpg, .gif, .png Images Subdirectory Sub-folder for organizing Category files. May exist under all standard Subdirectories Category Subsubdirectory Content Sub-Sub-folder for organizing Content Managed Page files. May exist under all standard subdirectory Subdirectories Products Sub-Sub-folder for organizing Product files. May exist under all standard Subdirectories subdirectory Upload Area File Name Unique name. When concatenated with the web server subdirectories, full name will be used for the file path reference on Products, Categories and on Content managed pages File Size Size of each individual file. It is recommended that files do not exceed 5 MB. 3 MB or



	smaller is preferred
Upload Directory	All uploads must be to the UserFiles Directory. Additional subdirectories may be added as
	necessary
Subdirectory	All uploads are routed to one of three main Subdirectories: Files, Flash or Images.
	Additional sub-subdirectories may be created as necessary
Add File(s)	Opens a Windows Explorer session in order to browse for files to be uploaded
Remove File(s)	Removes the selected file(s) from the to-be-uploaded list
Upload Count	Maintains a running count of the files listed in the Upload Area
Area	
Cancel Upload	Stop an upload in progress
Upload	Moves the selected file(s) to the webserver





This is an automatically updated log of database activity. Critical message types such as system outages or repeated failures can be flagged (via Application Settings) to trigger an email to IT.

Tools>Application Logs

	0	Page Size: 30 < 0	Get All > 1	- 30 of 578			
Global Settings				1	1	1	
Global Manageme	nt	Log Date	Туре	Source	Batch Number	Message	
Website Settings		Wed Mar 3 15:27:32 Gf	Error	Windows Service	0	Web Order Number W000563 has already been submitted as Ep	
Website Managem	nent	Mon Mar 1 14:38:47 GN	Debug	CommitList	0	Timing: 39 Milliseconds	
Financial		Wed Mar 3 15:16:07 Gf	Debug	Epicor9Integration	0	Finishing Integration Task: RefreshProducts	
Tools		Tue Mar 2 15:59:27 GM	Debug	CommitList	0	Timing: 42 Milliseconds	
Batch Processo		Wed Jan 13 08:57:07 🤅	Debug	Import	0	File Path: C:\EpicorCommerce\www\EpicorCommerce\Console\E	
Scheduled Task	s 🚺	Wed Jan 27 11:04:09 6	Error	Licensing	0	StackTrace: Server stack trace: at System.ServiceModel.Cha	
📄 File Manager		Wed Mar 3 15:17:02 Gf	Debug	Epicor9Integration	0	Starting Integration Task: SubmitOrders	
Application Log	5	Wed Mar 3 15:10:55 Gf	Error	Windows Service	0	$at \ In Site. Integration Broker. Remote Integration Controlctor()$	
Affiliates		Mon Mar 1 14:38:30 GN	Debug	CommitList	0	Timing: 16 Milliseconds	
Application Dict	ionary	Wed Jan 20 09:20:52 @	Error	Global.asax	0	The file '/PopUps/OrderSaved.aspx' does not exist. at System	
About	_	Wed Mar 3 15:21:48 Gf	Debug	Epicor9Integration	0	Finishing Integration Task: SubmitOrders	
		Tue Feb 23 13:41:12 G	Debug	CommitList	0	Timing: 32 Milliseconds	
		Wed Mar 3 14:48:09 Gf	Debug	CommitList	0	Timing: 288 Milliseconds	
		Tue Feb 23 13:20:41 G	Debug	CommitList	0	Timing: 219 Milliseconds	
		Tue Jan 12 12:27:01 G	Possible Error	Global.asax	0	There is no WebSite whose Domain Name is set to: qab2bdemos	
Field	Description	n					
Name	-						
Log Date	Date and tim	me of error or log	ged event				
Туре		nclude: Error, Del	0	fo			
Source	Module or process that generated the message						
Batch	Batch of lo	gged event					
Number							
Message	System gen	erated error-speci	fic messag	ge			

s of t w a r e



The **Affiliates** section of the Management Console supports integration with third-party affiliate online marketing programs.

Tools>Affiliates

	Page Size:	30 Get All 1 -	0 of 0			0
Global Settings		Name	Active	URL	Details	
Global Management Website Settings		Test	Active	http://www.example.com		
Website Management		1050		nep min novemporeen	Affiliate Information	
Financial Tools Batch Processor Scheduled Tasks File Manager Application Logs Affiliates Application Dictiona About	у				Name * Test URL * http://www.example.com Active Replace Logo Image Description	
Field Name	Description					
Name	Name of affi	liate market	ing partner			
URL	Website of A	ffiliate com	pany			
Active	Flags Affiliat	te as an activ	ve marketing	g partner		
		• • •	<u> </u>			

Description Optional description/comment field

*May require implementation of optional Advanced Module and/or advanced Integration services





The **Application Dictionary** is the backbone of the Management Console, specifying field names, data length and securing access and data requirements based on assigned User Roles.

Tools>Application Dictionary

Global Settings									
Global Management	Object Name	Field Name	Descri	Field Definition Details					
Website Settings	License	b2cdemosite	vfqY9wAs						
Website Management	License	b2bdemosite	vfqY9wAs						Regenerate
Financial	License		vfqY9wAs	Field Information					
Tools	License	qab2cdemosite	vfqY9wAs						
Batch Processor	Promotion	Active	Activation	Object Name 🔹 License		Description	vfqY9wAsq9OIss	hYpqZiKwHQTT+o	aN2ti
Cheduled Tasks	Promotion	Deactivate	Deactivati	Field Name * b2cdemosite		1	Include in Exp	ort	
📄 File Manager	Promotion	DiscountAmount	Discount 4]			
Application Logs	Promotion	Description	Descriptio						
Affiliates	Promotion	DisplayMessage	Display Me	Labels					
Application Dictionary	SOAFilterProperty	AndOr	AndOr	Add Delete					
About	Promotion	Name	Name~						
	Promotion	PromoCode	Promotion	Language Code	System Label	Custo	mer Label	Tip	
	SOAFilterProperty	DataType	DataType						
	SOAFilterProperty	Name	Name						
	SOAFilterProperty	Grouping	Grouping						
	ShipRule	RuleName	Rule Name						
	ShipRule	Condition	Condition						
	SOAFilterProperty	Value1	Value1						
	SOAFilterProperty	Operator	Operator	Attributes					
	ShipRule	ExecutionGroup	Execution	Add Delete					
	SOAFilterProperty	Value2	Value2						
	ShipRule	ExecutionOrder	Execution	Role ID	Display Ty	Min Value	Max Value Defau	lt Va Grid	Req'd

	ShipRule ExecutionOrder Execution								
Field Name	Description								
Field Informati	on								
Regenerate	Reviews the entire Commerce application for Object and Field additions/edits, in order to								
	create new Application Dictionary records								
Object Name	Parent construct of the associated data element. May be a table, field, button or function.								
	Objects are called out in all commerce code. Object names must not be changed.								
Field Name	May be a table, field, button or function. Field names are called out in all commerce code.								
	Field names must not be changed.								
Description	An editable area used to give a general description of each field								
Include In	Flags field as an element to include in the contextual export								
Export									
Labels									
Add	Creates a new label record								
Delete	Flags a label record for deletion								
Language	ISO standard code used to identify the language of specified field labels in the Management								
Code	Console. Required								
System Label	Management Console default label. Required								
Customer	Optional, implementation specific label. Used to synchronize naming conventions between a								
Label	given ERP and the Management Console								
Tip	Optional tool tip to display when mousing over the selected field								
Attributes									
Add	Creates a new, Role based attribute for the selected field								



Delete	Flags an attribute record for deletion
Role ID	User Role that dictates security level for website and Management Console. All attributes are
	controlled per Role ID
Display Type	Identifies how Users with the associated Role may access the selected field in the Management
	Console. Options are: 2=Read and Write, 1=Read Only, 0=Hidden
Min Value	The minimum value that must be entered in a required field
Max Value	The maximum value that may be entered in the selected field
Default Value	The default value to automatically load in the field when creating a new record
Grid	Flags the selected field to be displayed in the grid as well as form view display type. This is
	required for all fields that exist on grid only pages
Req'd	Flags the field as being required when creating a new, or editing an existing record





The about section contains company-specific licensing and module details. When logging in to the Management Console for the first time, users will be directed to the About:Registration area to complete their application registration.

Tools>About

	About	Registration	Plugins			
Global Settings						
Global Management		_				
Website Settings	Epie	cor Commer	-ce 3.0.1			
Website Management	Copy	yright © 2010,	, Epicor Software S	olutions, Inc.		
Financial						
Tools	Mod		Status	Count	Expiration Date	_
Batch Processor	Data:		Permanent	1	Mon Dec 30 2069	
Scheduled Tasks		igementConsole	Permanent	1	Mon Dec 30 2069	_
📄 File Manager	Integ	ration	Permanent	1	Mon Dec 30 2069	
Application Logs						
🗋 Affiliates						
Application Dictionary						
🗋 About	Licer	nsed for Hosts				
		dvanceddemosite				
		emosite				
		c.icdemosite.com				
		emosite				\square
	b2ce	c.icdemosite.com				
		rcommerce.icdemosite	e.com			
						•
	Please	visit www.epicor.con	n to learn more about expar	iding your licensing agreement.		
	distrib		or any portion of it may res	-	es. Unauthorized reproduction or enalties and will be prosecuted to the	
Field Name	Description					
Application		lication versi	on ID and comp	any to which it is	licensed	
Version	11		1	•		
Module	Module name s	uch as Mana	gement Console	, Integration Servi	ce. etc.	
Status			nanent, Provision		,	
Count	Number of unit					
	1	-				
Expiration Date	Date when licer	nse expires				



Tools>About: Registration

	•	About	Registration	Plugins												
Global Settings																
Global Management		Disease						isten og viller og som	i-t	i- h -n	i-t	·		·	······································	
Website Settings		Please	complete and submit	this form to r	зg	ister you	ister your Epicor	ister your Epicor Com	Ister your Epicor Commerc	Ister your Epicor Commerce sor	Ister your Epicor Commerce sortware	ister your Epicor Commerce sortware and	Ister your Epicor Commerce sortware and apply	Ister your Epicor Commerce sortware and apply for a	ister your Epicor Commerce sortware and apply for a permai	ister your Epicor Commerce software and apply for a permanent lic
Website Management		Cust	tomer ID 🌸													
Financial		Conta	ct Name 🔹		-											
Tools		-														
Batch Processor		Compar	ny Name 🔹													
Scheduled Tasks			Email ∗													
📄 File Manager		Τe	elephone 🔹													
Application Logs																
Affiliates		Subr	mit Registration	J												
Application Dictionar																
About																
About																
Field Name	Descriptio	n														
Customer ID	ID as provi	ided by I	InSite or Part	ner												
Contact Name	Primary co	Primary contact for license														
Company Name	Name of co	Name of company associated with the ID provided														
Email	Primary contact email address															
Telephone	Primary contact telephone number															
Submit	Sends regis	stration r	request to Ins	site Softv	7	are	are	are	are	are	are	are	are	are	are	are
Peristration			-													

Tools>About: Plug-Ins

	About Registration Plugins					
Global Settings						
Global Management						
Website Settings	Service	Implementation				
Website Management						
Financial						
Tools						
Batch Processor						
Scheduled Tasks						
📄 File Manager						
Application Logs						
Affiliates						
Application Dictionary						
About						
Field Name	Description					
Service*	Description of implemented commerce modules that may be modified per impementation					
Implementation	Reference of Standard vs. Custom assembly of associated service					

*May require implementation of optional Advanced Module and/or advanced Integration services



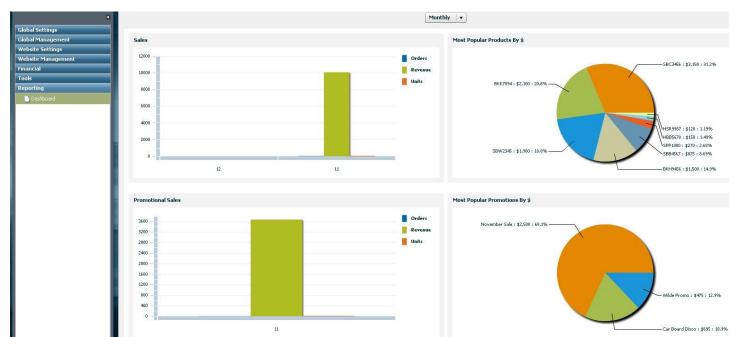
Tools>About: Regis	stration	
	About Registration	
Global Settings		
Global Management		
Website Settings	Please complete and submit this form to register your Epicor Commerce softw	
Website Management	Customer ID *	
Financial	Contact Name *	
Tools		
Batch Processor	Company Name *	
🗋 File Manager	Email \star	
Application Logs	Telephone *	
🗋 Affiliates	Submit Registration	
Application Dictionar		
🚹 About		
ield Name	Description	
Customer ID	Application specific Customer ID number	
Contact Name	Contact at Customer	
Company Name	Name of company licensing Commerce application	
Email	Primary email contact at said company	
Telephone	Primary telephone number at said company	
Submit Registration	Transmits application registration	





Dashboard

The reporting **Dashboard** provides quick, configurable snapshots of order data, so you can keep an eye on your day-to-day sales and promotions.



Field Name	Description				
Date Dropdown	Daily, weekly, monthly and yearly reporting parameter selector				
Sales Bar Graph	Sales by Order, Revenue and Unit count				
Promotional Sales Bar	Promotional sales by Orders, Revenue and Unit count				
Graph					
Product Popularity Pie Chart	Product popularity by dollar value				
Promotion Popularity Pie	Promotion popularity by dollar value				
Chart					