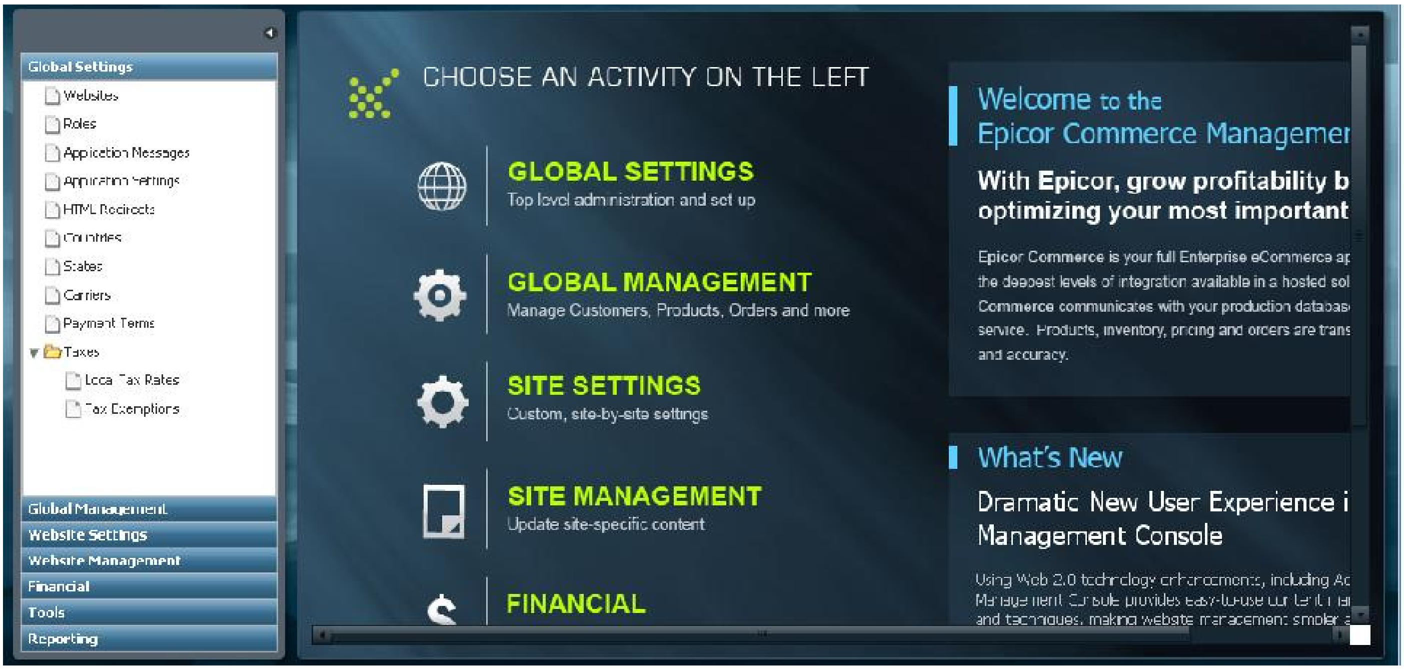
Welcome To the Commerce Management Console

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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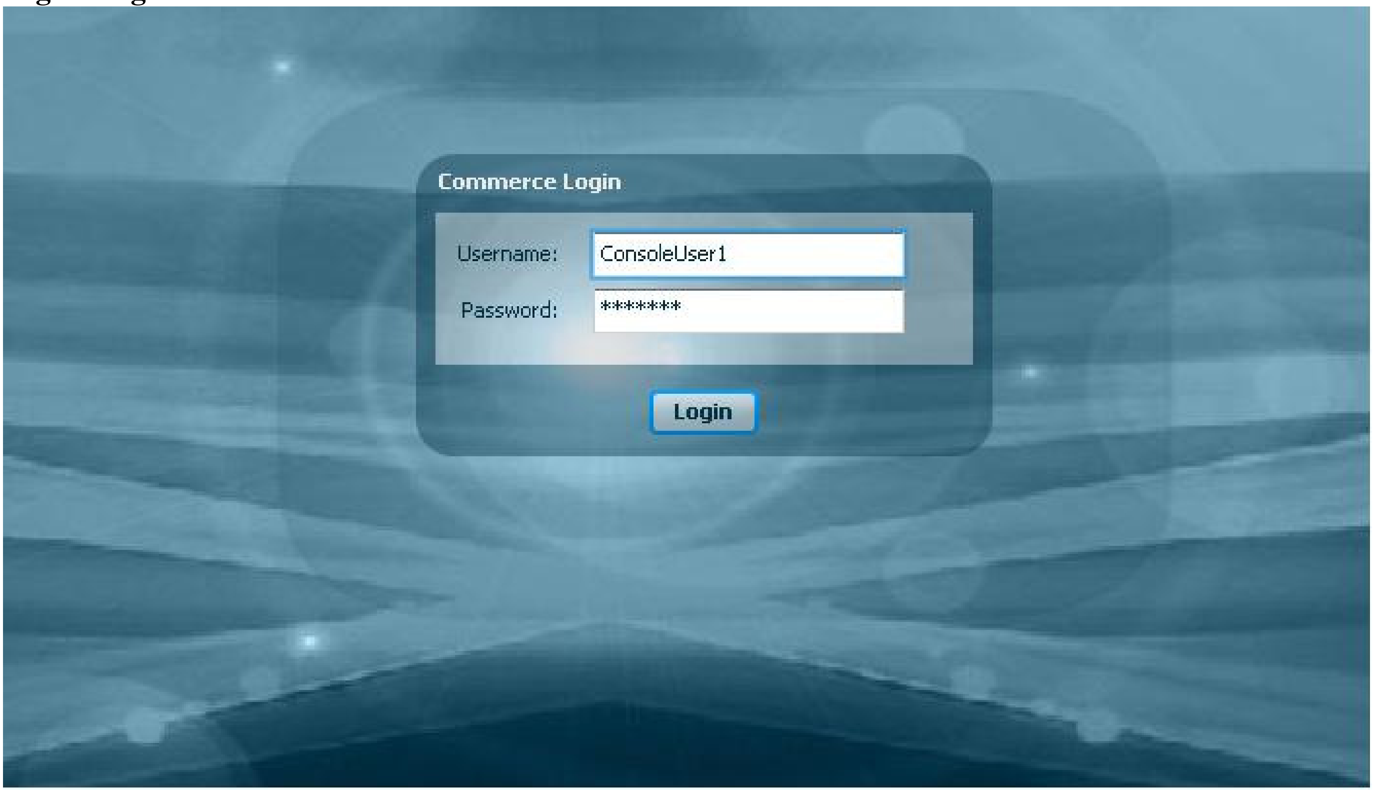
Accessing the Management Console

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

Log In Page



Navigation

Main Menu

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

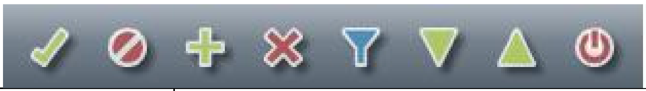
Global Settings: Top level administration and set-up
Global Management: Manage Customers, Products, Orders and more
Website Settings: Custom, site-by-site settings
Website Management: Update site-specific content
Financial: Credit card transactions and payment profiles
Tools: Batch processors and file 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

Top Button Bar

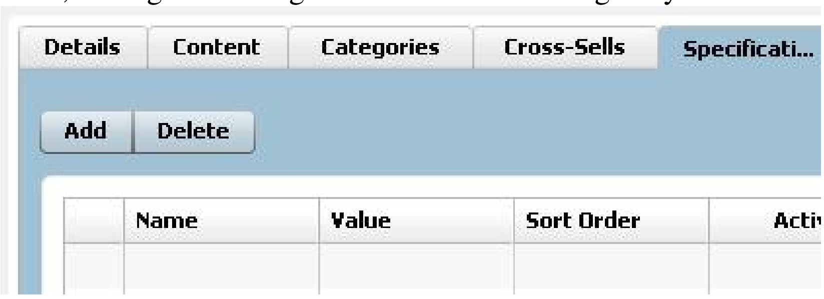
Record management functions on all pages are controlled by the contextual Top Button Bar. These universal controls allow you to make and save changes, always within the context of the page you are on at any given time.



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.



Modified Records

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

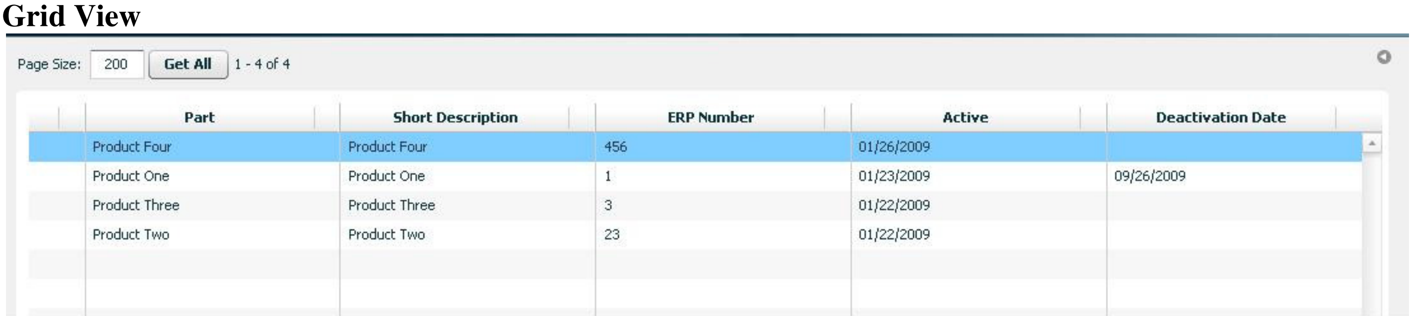
Page Size

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.

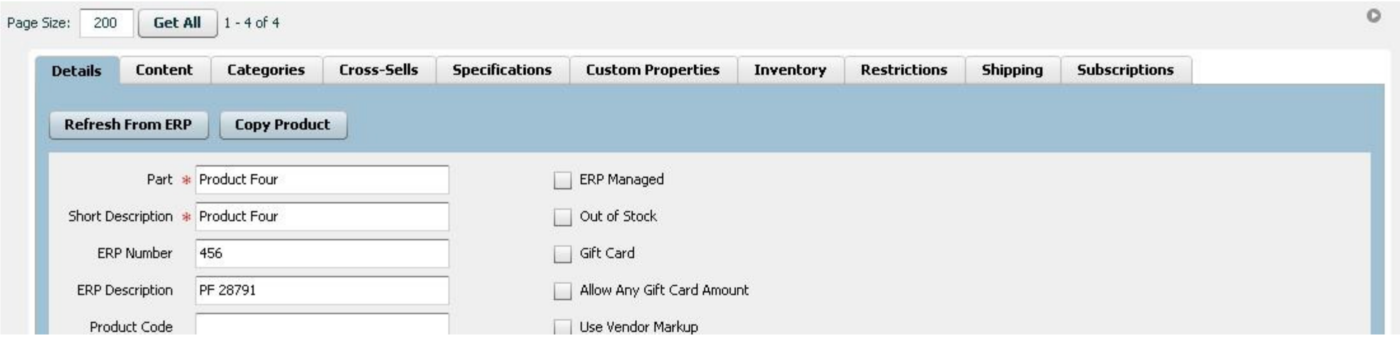
Page View Types

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.

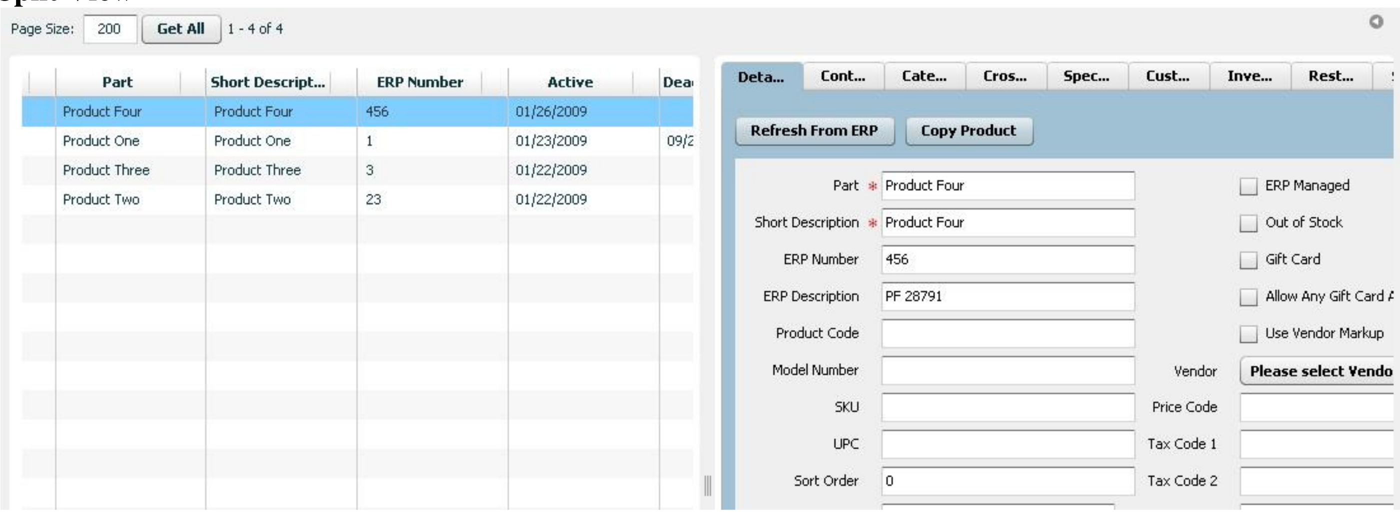
Grid View



Form View



Split View

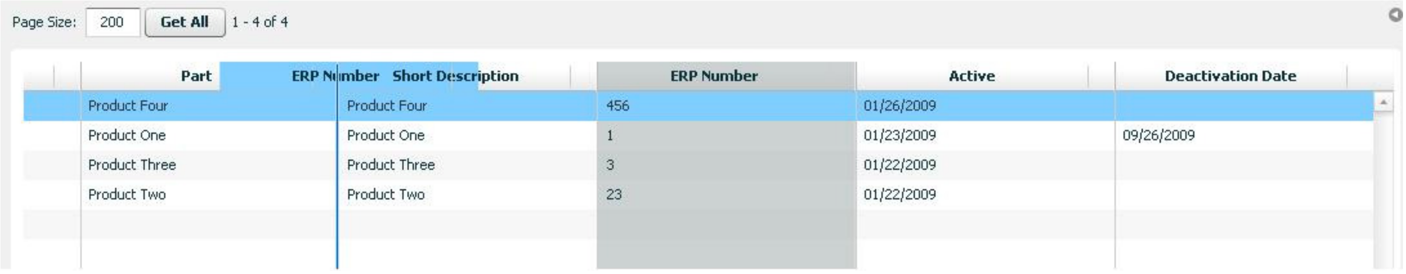


Working with Grids

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.

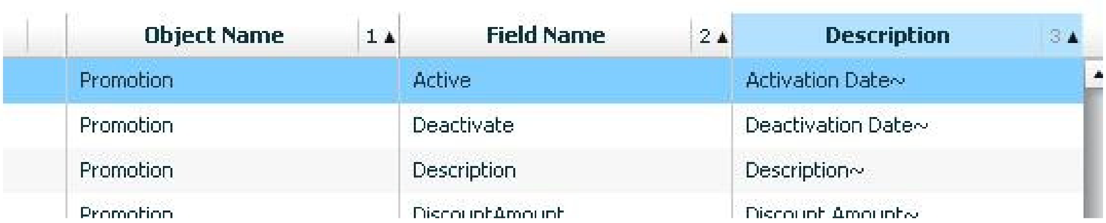
Rearranging Grid Columns

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.



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.



Filtering

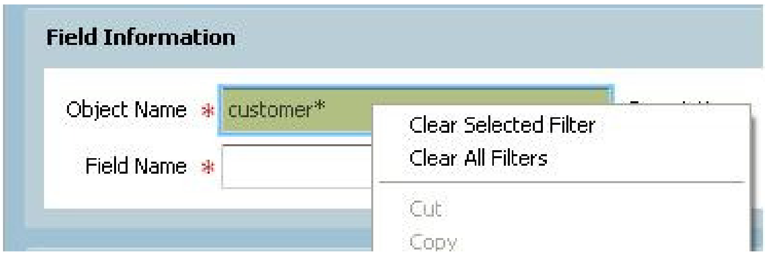
Filtering allows you to narrow a large data set to just the selected records you want to see and work with. Clicking the filter button once turns on the filtering environment, so you can enter single or multiple variables. Clicking it again will execute the filter. When you begin entering your filtering 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.

 **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"



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

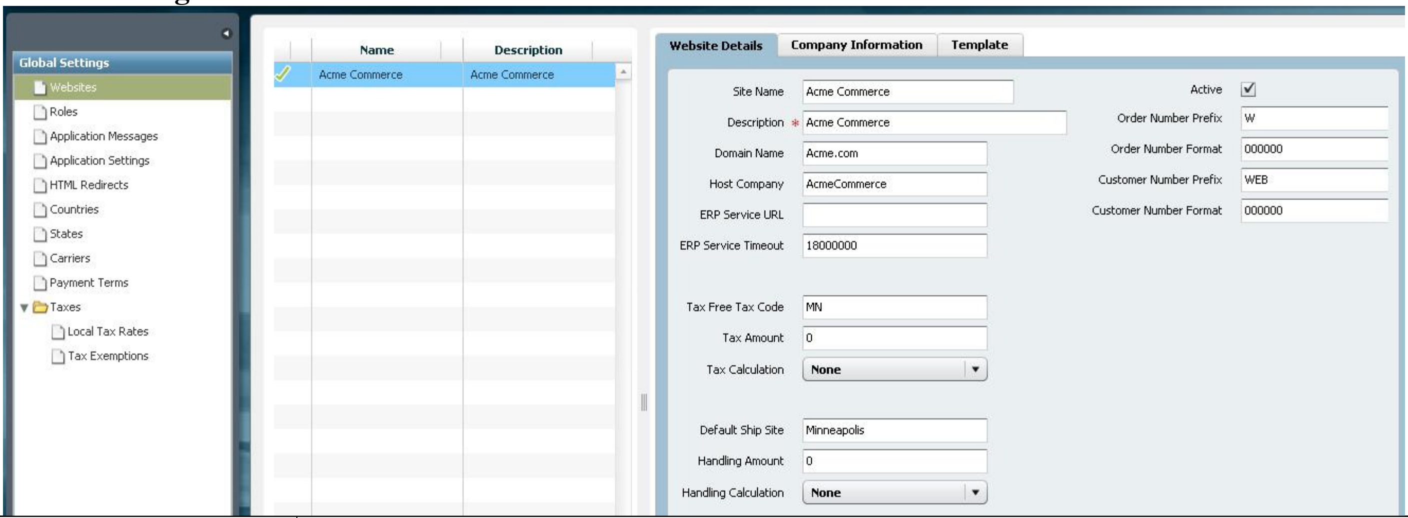
Section Descriptions

Global Settings

Websites

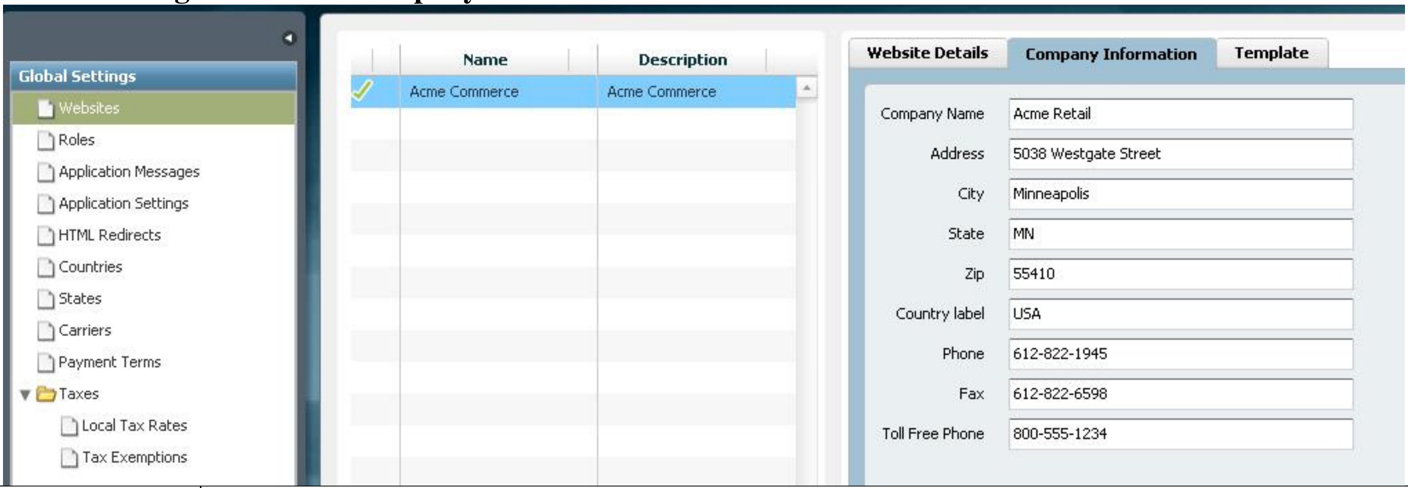
The Websites section maintains the top-level site details, such as the URL, design specific tags and templates, ERP integration settings and the default company information for your site(s) are maintained here. Please note that any changes can result in “breaking” the design of your site(s).

Global Settings>Websites:Website Details



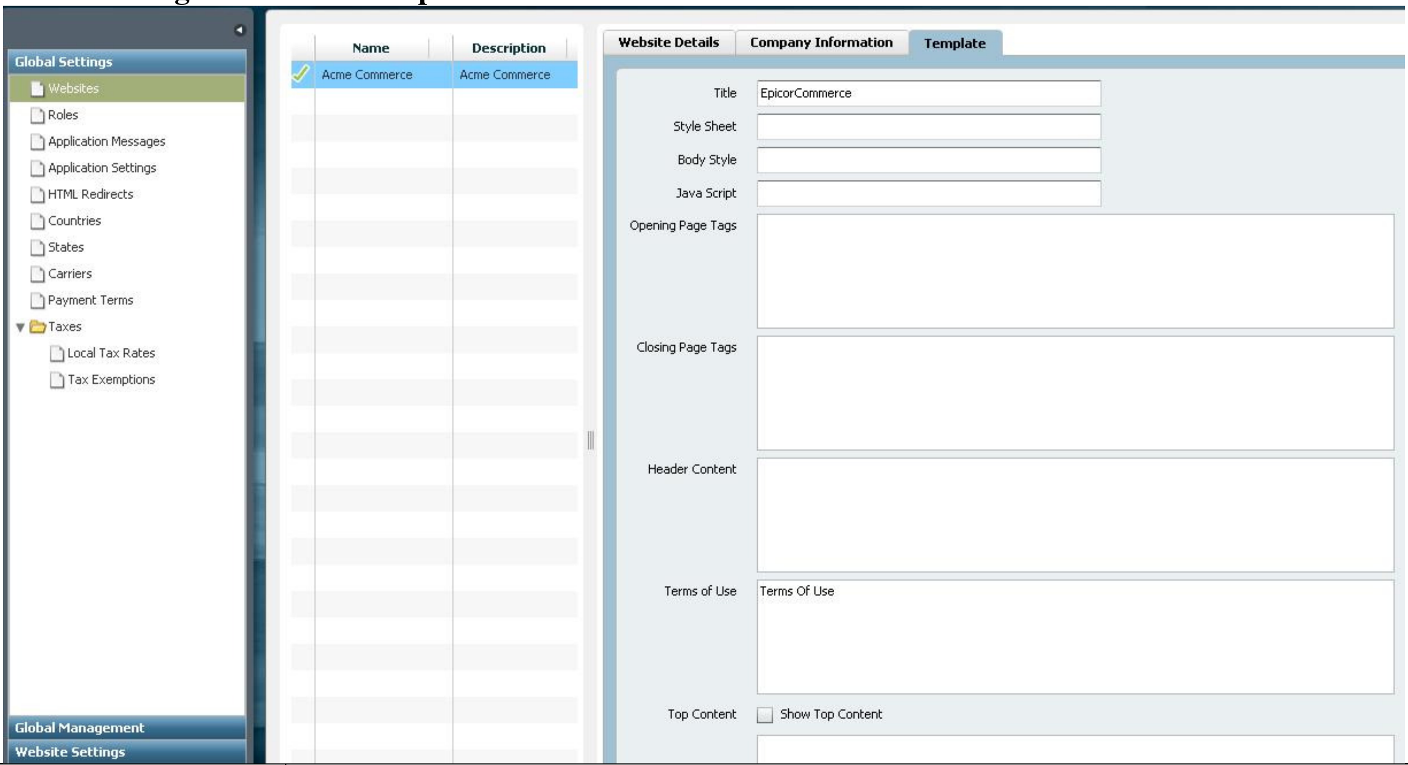
Field Name	Description
Site Name	Website name. Will display in site selector dropdown on Management Console for multi-site implementations
Description	Short, optional description of website
Domain Name	Registered domain name
Host Company	Optional descriptor of domain holder
ERP Service URL	The path for 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 Prefix	Optional prefix, used to distinguish web customers in the ERP
Customer Number Format	Specified style that web customer numbers are to be in

Global Settings>Websites:Company Information



Field Name	Description
Company Name	Company running both Commerce and the Management Console
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 Code	Zip/Postal Code of Company. May be used for shipping rating calculations
Country	Country of Company. May be used for shipping rating calculations
Phone	Primary telephone number
Fax	Primary fax number
Toll Free Phone	Secondary telephone number

Global Settings>Websites: Template

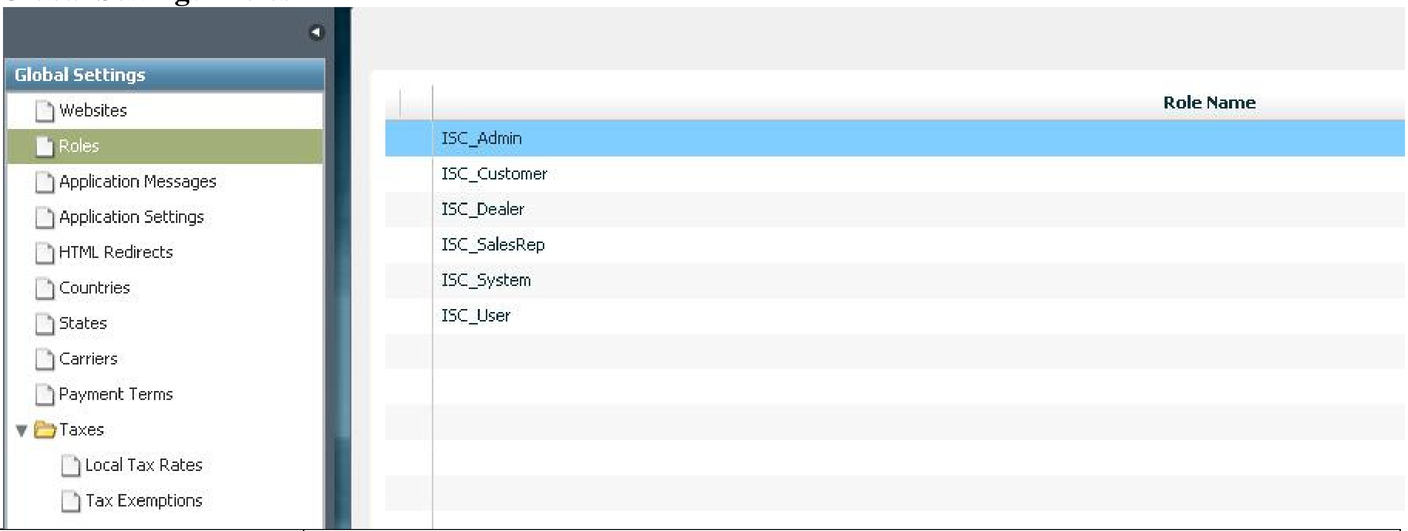


Field Name	Description
Title	Top browser page display
Style Sheet	Optional website styling control
Body Style	Optional styling control for the body of the website
Java Script	Optional website javascript reference for entire website
Opening Page Tags	Optional HTML tag wrapper
Closing Page Tags	Optional HTML tag wrapper
Header Content	Optional data field for HTML-head
Terms of Use	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 Content:Show	If checked, flags related content area to be displayed on website
Bottom Content Area	Optional field if HTML is being controlled from the database

Roles

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

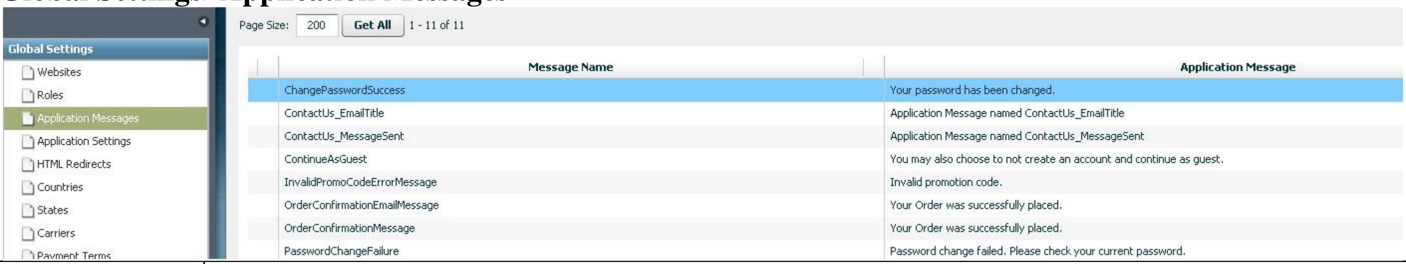


Role Name	**Description**
ISC_Admin	Administrative access to website and Management Console, with the rights to modify Customers, Products, Web Pages and content. Content Manager
ISC_Customer	May be used to identify secured access to website. Site customer with an online account requiring username and 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 related, subsidiary Dealers
ISC_SalesRep	May be used to secure Sales Representative access to website and to assigned Customer records and orders.
ISC_SalesRepManager	May be used to secure Sales Representative access to website. May have access to 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

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

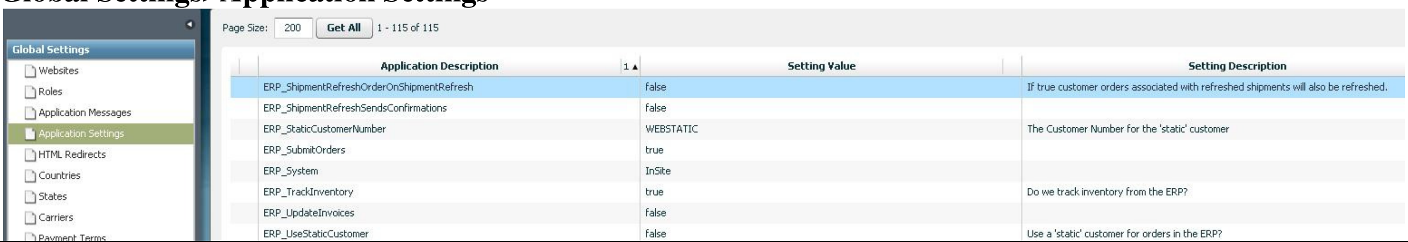


Field Name	Description
Message Name	Internal reference name. May be referenced in critical site coding
Value	Detailed copy that will display to website users

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

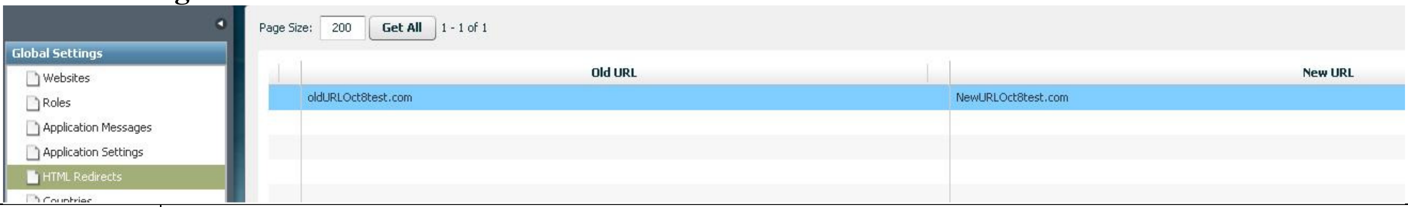


Field Name	Description
Application Description	Internal reference. Often referenced in critical site coding
Setting Value	Value paired with Application Description to control the Commerce application(s)
Setting Description	Describes the setting, what it is used for, and where it is referenced in the website, management console, and/or ERP Integration

HTML Redirects

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

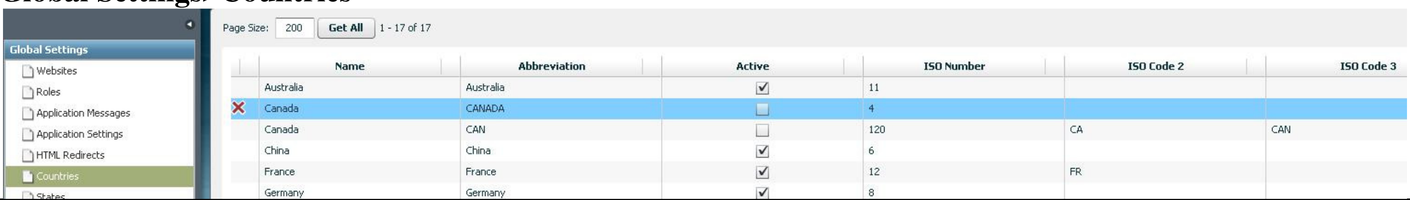


Field Name	Description
Old URL	Specific page from old website, which traffic should be redirected from. Note: PHP URLs cannot be redirected via the HTML Redirect table
New URL	Specific page on new site that traffic should be redirected to

Countries/States

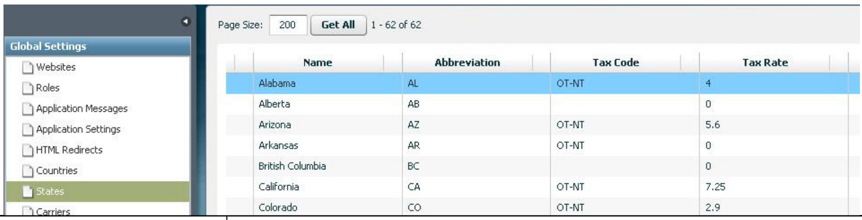
These are the **Countries**, **States** and **Provinces** that your websites may service. Specific locations are assigned to each website via Site Settings. State-level taxes are also managed in this area. This information may be set-up manually in the Management Console or via an Excel import.

Global Settings>Countries



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

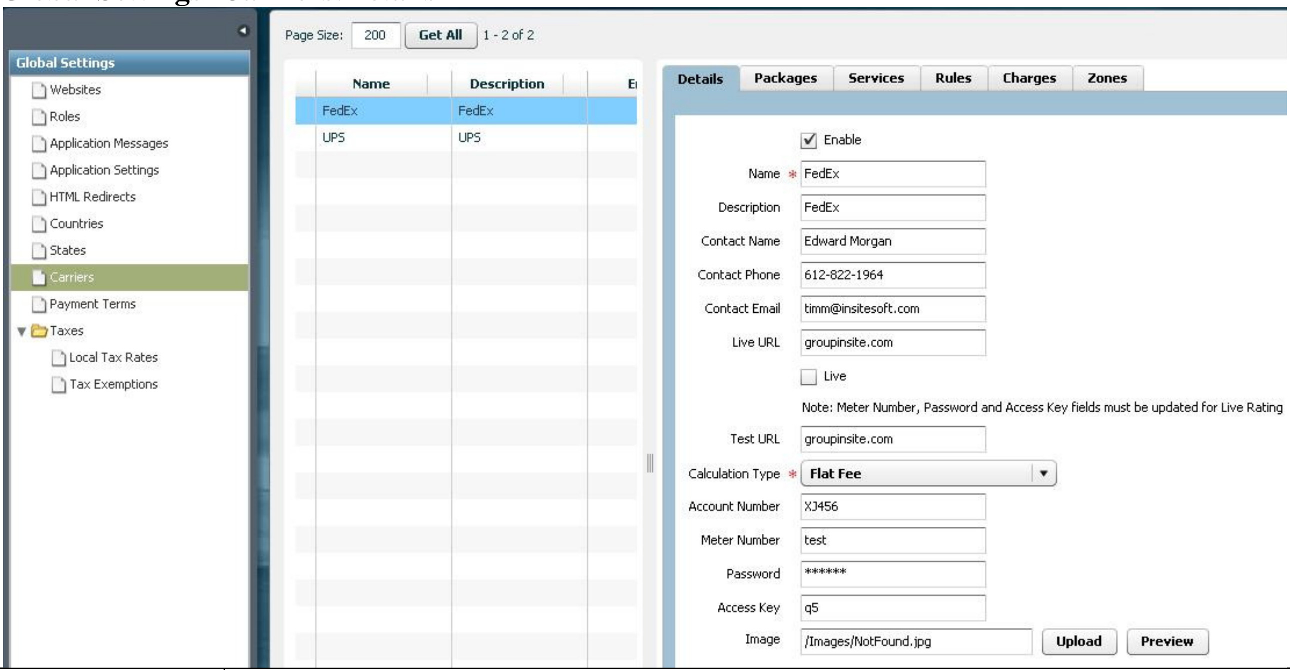


Field Name	**Description**
Name	State or Province name
Abbreviation	Official International Standard for Organization 2 character code
Tax Code	Code for state-wide taxes
Tax Rate	Percentage for state-wide tax calculation
Taxable	If checked, indicates that State is subject to state-wide tax
Tax Freight	If checked, indicates that freight charges are to be included in tax calculations
Handling Amount	Dollar amount for state-specific, additional handling amount. Often used for AK, HI & PR surcharges
Active	Indicates an active State, serviced by company. Later Site Settings may indicate billing and shipping preferences

Carriers

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)

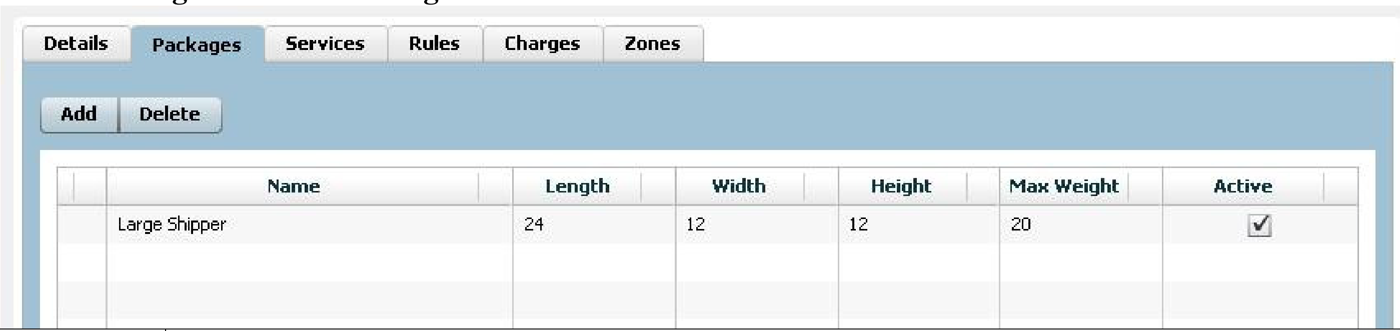
Global Settings>Carriers:Details



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 Type	Way in which freight charges are to be calculated. Choose from: None, Flat Fee, Percentage, Package Rated
Account Number	Account number for ship-from location
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
Upload	Opens Windows Explorer browser to select an image to add to the File Manager/Server

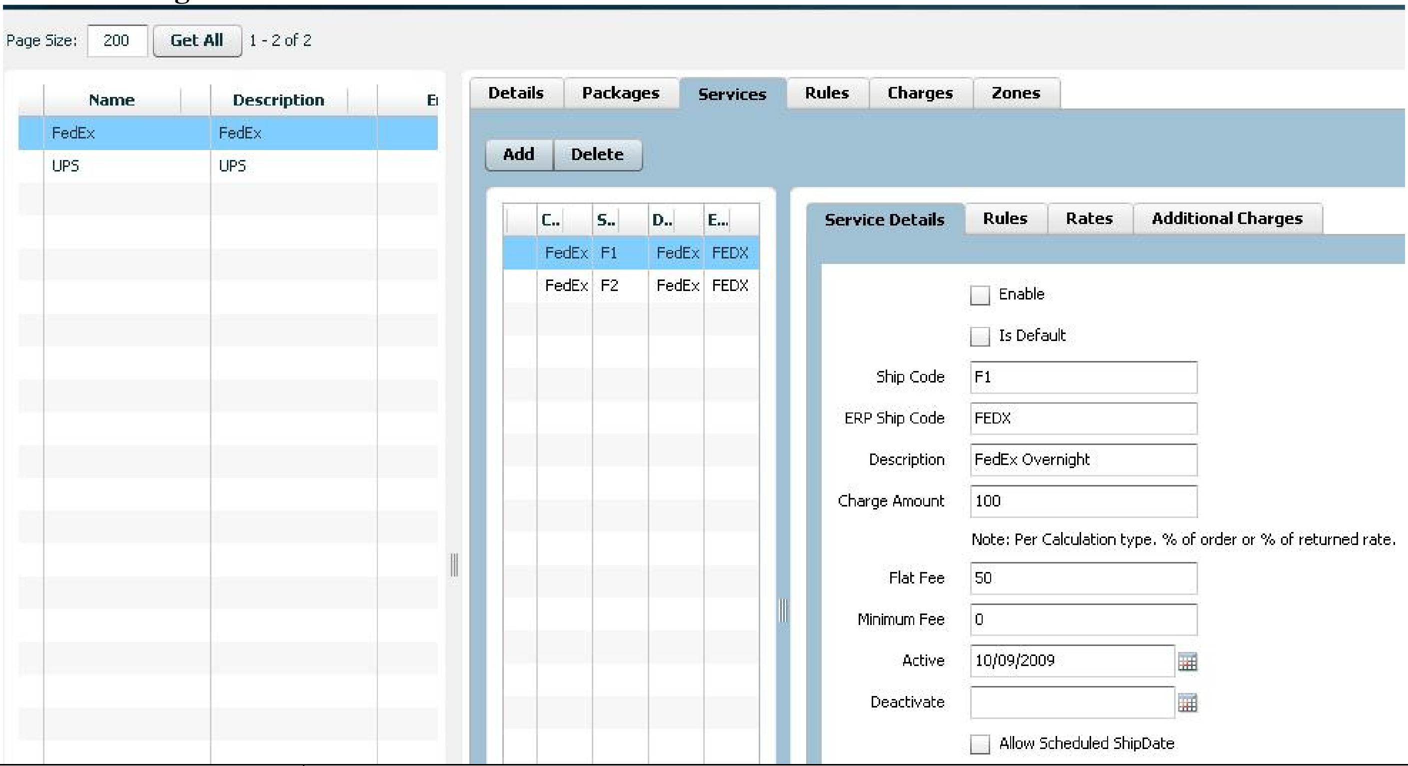
Preview	Opens preview pop-up of Carrier image

Global Settings>Carriers:Packages



Field Name	**Description**
Add	Creates a new default package, assigned to the selected Carrier
Delete	Deletes a selected default package
Name	Name or description of the default package
Length	Package length, in inches, to be used for rating calculation
Width	Package width, in inches, to be used for rating calculation
Height	Package length, in inches, to be used for rating calculation
Max Weight	Maximum weight default package can hold, in pounds, to be used for rating calculation
Active	Activates package, so it will be used for rating calculation on applicable orders

Global Settings>Carriers: Services>Service Details



Field Name	Description
Enable	Flags service as an active option provided by the selected Carrier. May be used to determine website checkout options
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 Date	Flag used if site design allows customer specified ship dates

Global Settings>Carriers: Services>Service Rules

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

Global Settings>Carriers: Services>Service Rates*

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 Amount	Flat dollar amount of freight to charge per order 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

Field Name	Description
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~

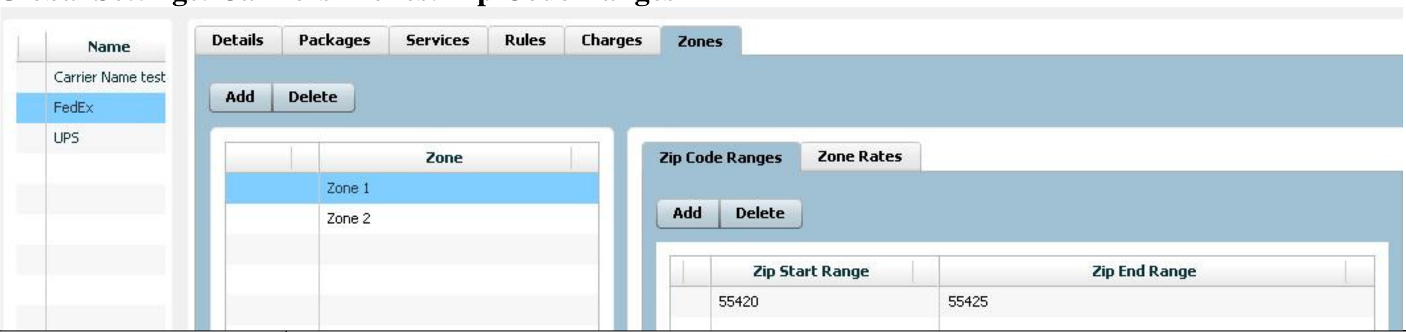
Field Name	Description
Add	Adds a new rule to the specified Carrier
Delete	Flags a selected rule for deletion
Rule Name	Opens dropdown menu to select Carrier Rule
Execution Group	Group number, allowing parenthetical rule constructs
Execution Order	Order in which Rule is to be evaluated against an order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

~Please see Carrier Rule Index

Global Settings>Carriers: Charges

Field Name	Description
Add	Creates a new Additional Charge record on the Carrier
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>Zones: Zip Code Ranges



Field Name	Description
Add	Adds a new Zone record on the Carrier
Delete	Flags a selected Zone for deletion
Zone	Name or description of Zone
Zip Code Ranges Add	Adds a new Zip/Postal Code Range, associated with the selected Zone
Zip Code Ranges Delete	Flags a selected Zip/Postal Code Range for deletion
Zip Start Range	Beginning Zip/Postal Code for a range
Zip End Range	Last Zip/Postal Code for a range

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

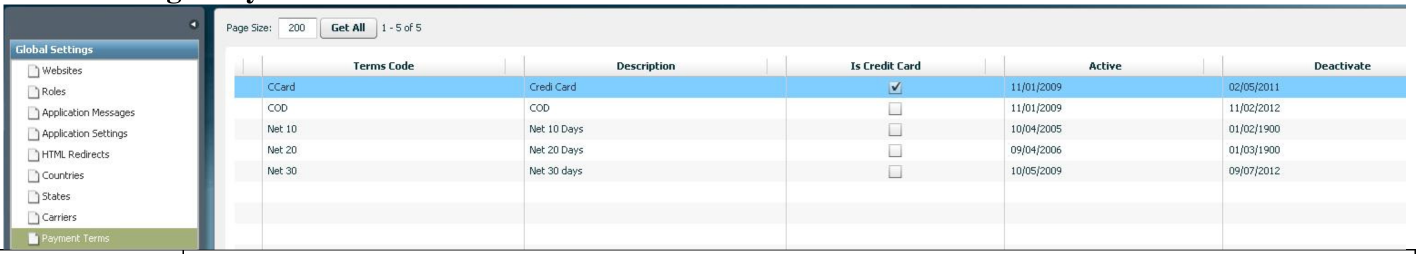
Global Settings: Carriers>Zones: Zone Rates

Field Name	Description
Zone Rate Add	Adds a new Rate record to the selected Zip/Postal Code Range, per Zone
Zone Rate Delete	Flags a selected Rate for deletion
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

Payment Terms

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

Gobal Settings>Payment Terms

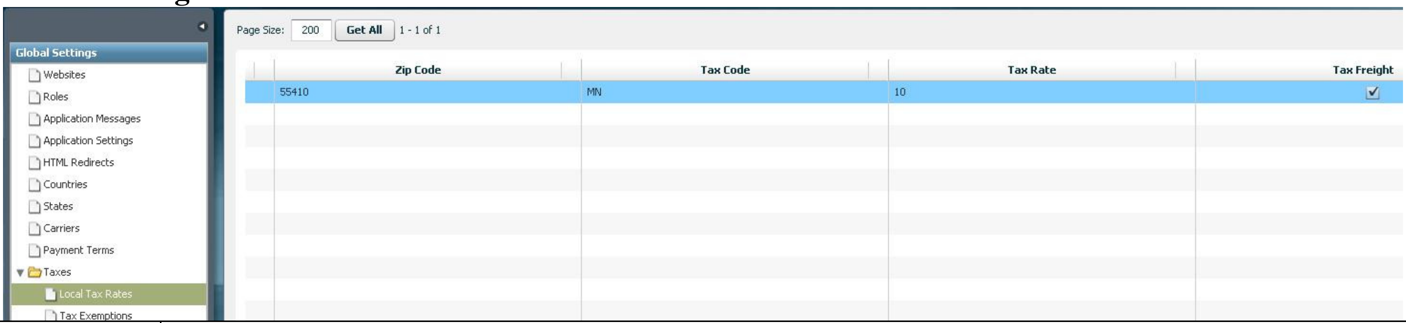


Field Name	Description
Terms Code	ERP specific terms code
Description	General description of payment term code
Is Credit Card	Flags specific terms as credit card based
Active	Date at which code is active
Deactivate	Date at which term will no longer be active

Taxes

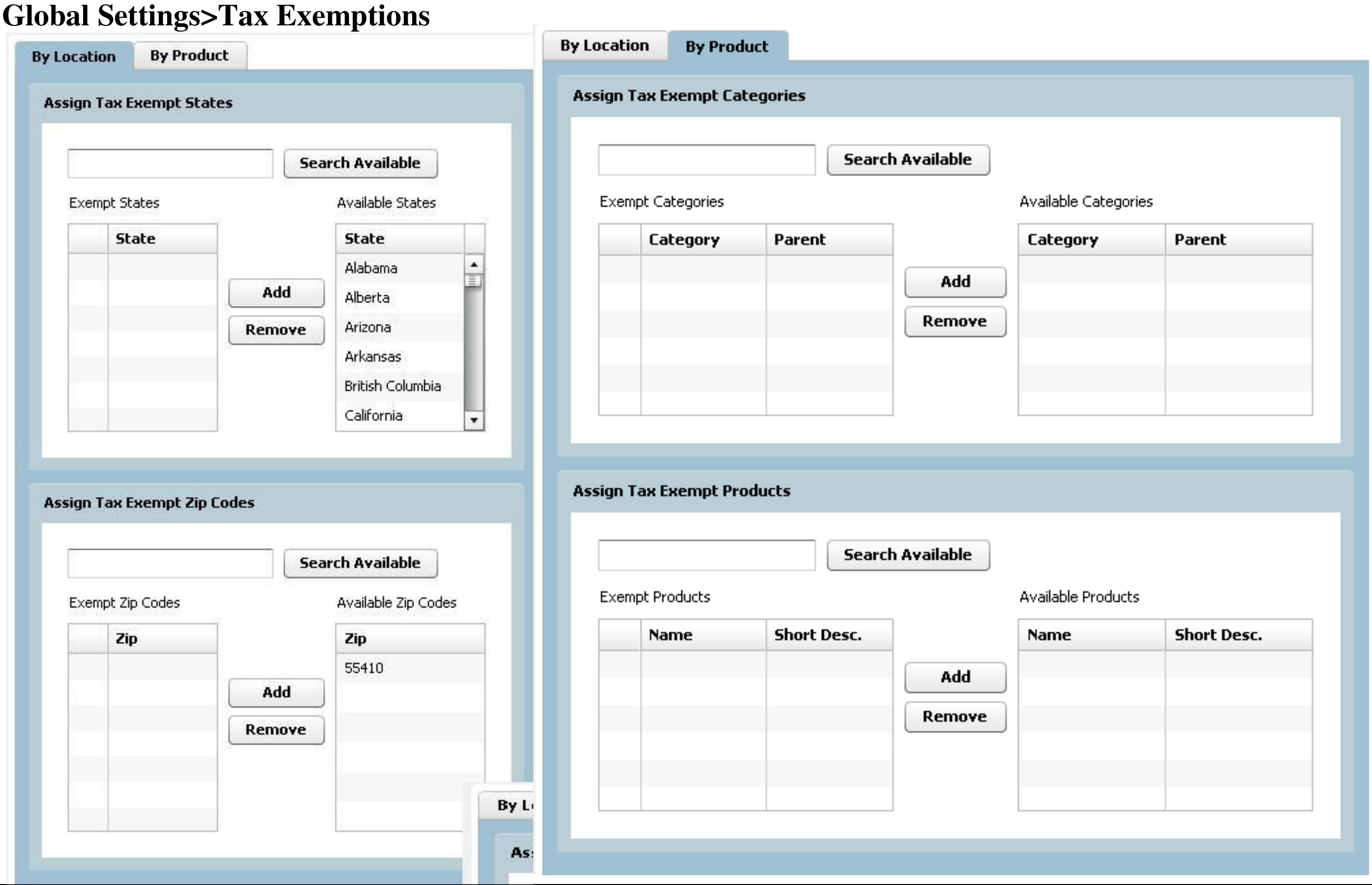
Local tax rates (based on Zip/Postal Codes) are managed in this section. Tax exemptions for specific States, Postal Codes, Categories and Products are also managed here. (Note: Specific Customers that are tax exempt are managed via their customer record Tax Codes. State/Province based taxes are managed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

Global Settings>Local Tax Rates



Field Name	Description
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



Field Name	**Description**
By Location: Assign Tax Exempt States	
Search Available	Searches all available States. Uses an * for wildcard searching
Exempt States	States exempt from general taxation
Available States	Search results from Search Available function of States that may be marked as tax exempt
Add	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.
Remove	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.
By Location: Assign Tax Exempt Zip Codes	
Search Available	Searches all available Zip/Postal Codes. Uses an * for wildcard searching
Exempt Zip Codes	Specific zip codes that are exempt from general taxation
Available Zip Codes	Search results from Search Available function of Zip Codes that may be flagged as tax exempt
Add	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.
Remove	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: Assign Tax Exempt Categories	

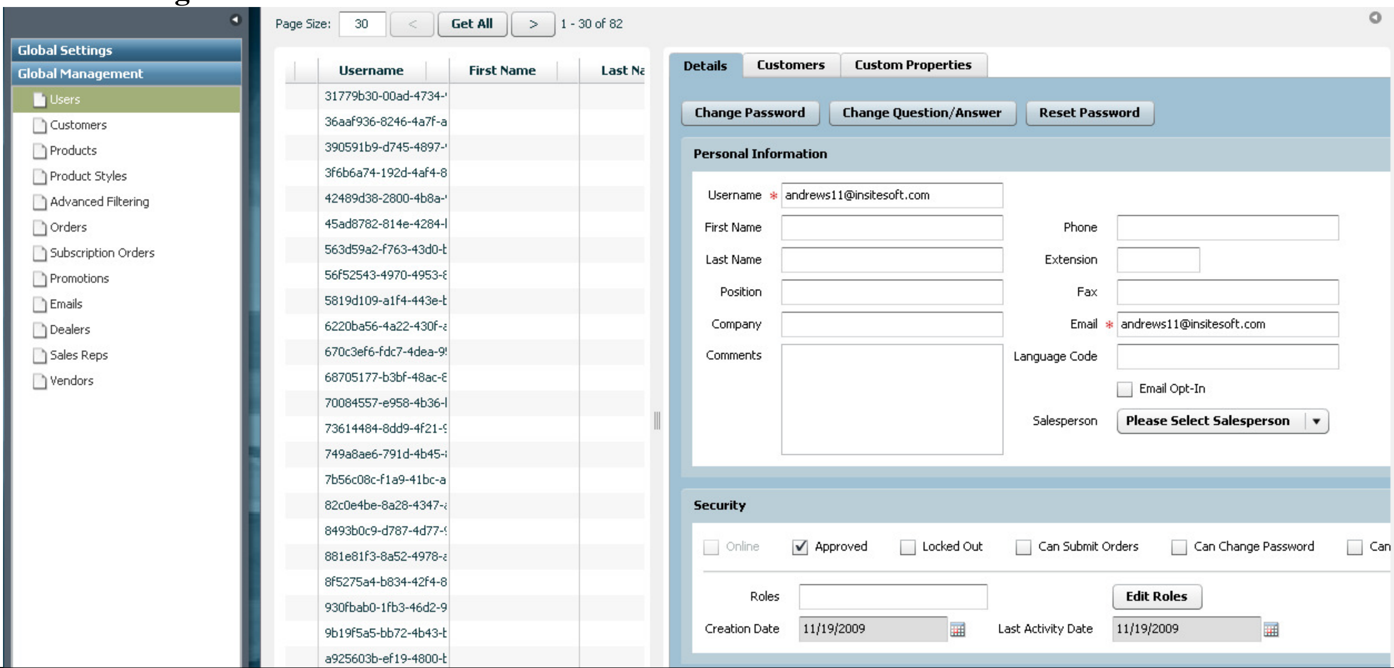
Search Available	Searches all available product Categories. Uses an * for wildcard searching
Exempt Categories	Specific Categories that are exempt from general taxation
Available Categories	Search results from Search Available function of Categories that may be flagged as tax exempt
Add	Moves one or 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: Assign Tax Exempt Products	
Search Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for wildcard searching
Exempt Products	Specific Products that are exempt from general taxation
Available Products	Search results from Search Available function of Products that may be flagged as tax exempt
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.

Global Management

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.

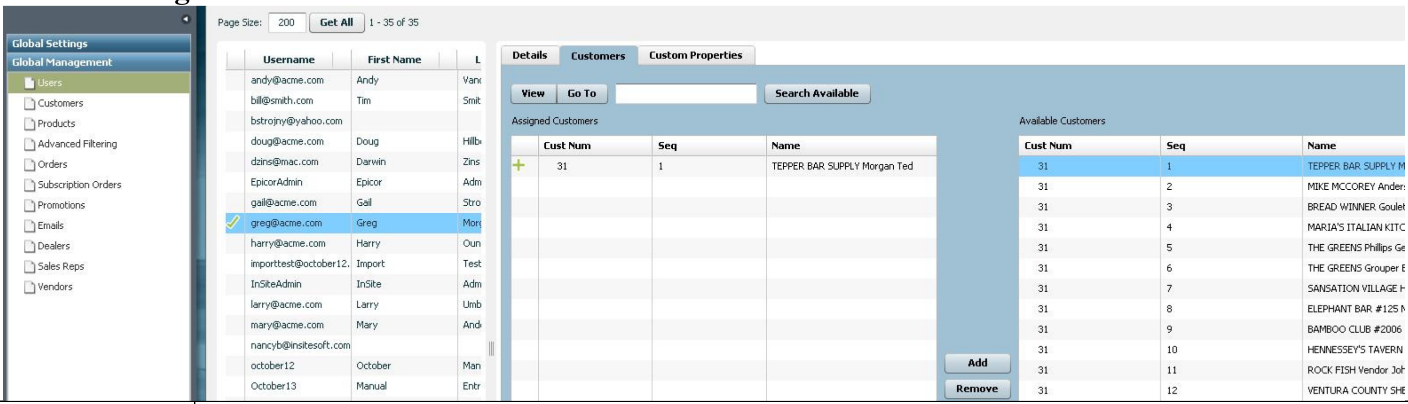
Global Management> Users: Details



Field Name	Description
Security Function Buttons	
Change Password	Pops up a window allowing old and new passwords to be entered and reset by Admin
Change Question/Answer	Pops up window allowing User's security confirmation question and answer to be reset by Admin. Requires custom security implementation on website.
Reset Password	Auto-generates a new password and email to the User
Personal Information 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.

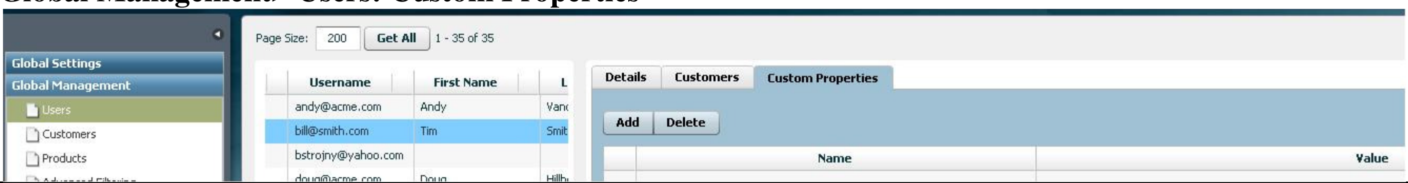
Language Code	The user's preferred language code. Generally a four-character code such as, "en-us." This is used to determine the field labels presented in the Management Console in multi-lingual implementations. The default value is "en-us," for United States English.
Email Opt-In	If checked, indicates that a user has elected to receive subscription based emails.
Salesperson	If the Salesperson Management Module is implemented, Users can be cross-referenced with their related Salesperson ID or code.
Security Section	
Is Online	If checked, indicates that the user is logged in to the website at the present time.
Approved	Flag used for implementation specific security settings per user
Locked Out	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.
Can Submit Orders	If checked, indicates that when the user submits an order, the order can join the ERP submission process, rather than being held for approval.
Can Change Password	If checked, indicates that the user has permission to change their password themselves, without oversight.
Can View All Orders	User is allowed to view all orders tied to their associated Customers
Roles	Assigned security Roles for website and/or Management Console
Edit Roles	Opens pop-up window with list of Roles that may be assigned or removed
Creation Date	Date on which User was created, either by manual entry, upload, or through website order entry
Last Activity Date	Date of User's last log-in to the website or Management Console

Global Management> Users: Customers



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

Global Management> Users: Custom Properties*



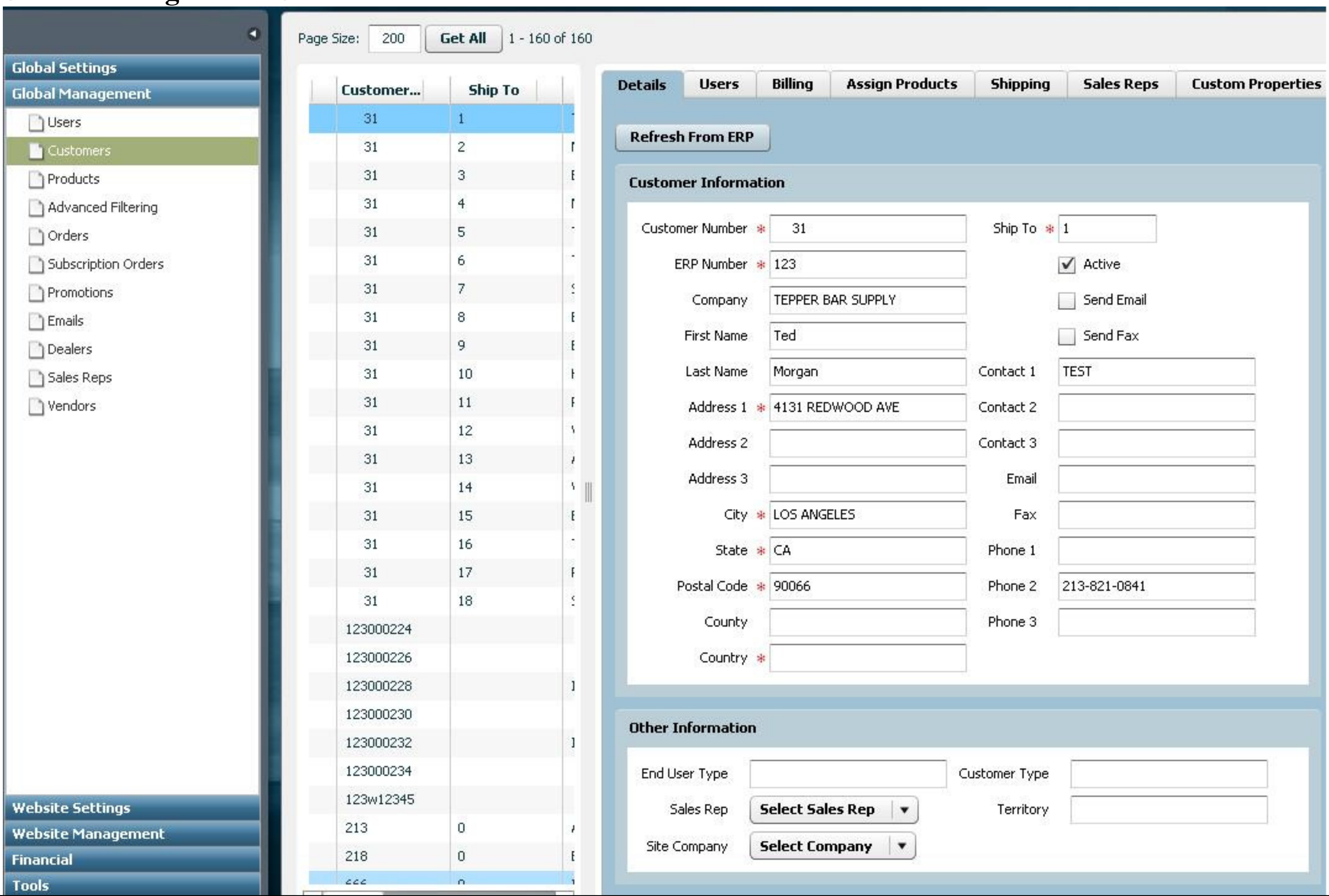
Field Name	Description
Add	Adds a new Custom Property Record.
Delete	Flags the selected Custom Property for deletion. Delete will execute upon clicking the top Save button.
Name	Name of the individual custom property.
Value	Property value, used to drive customizations.

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

Customers

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

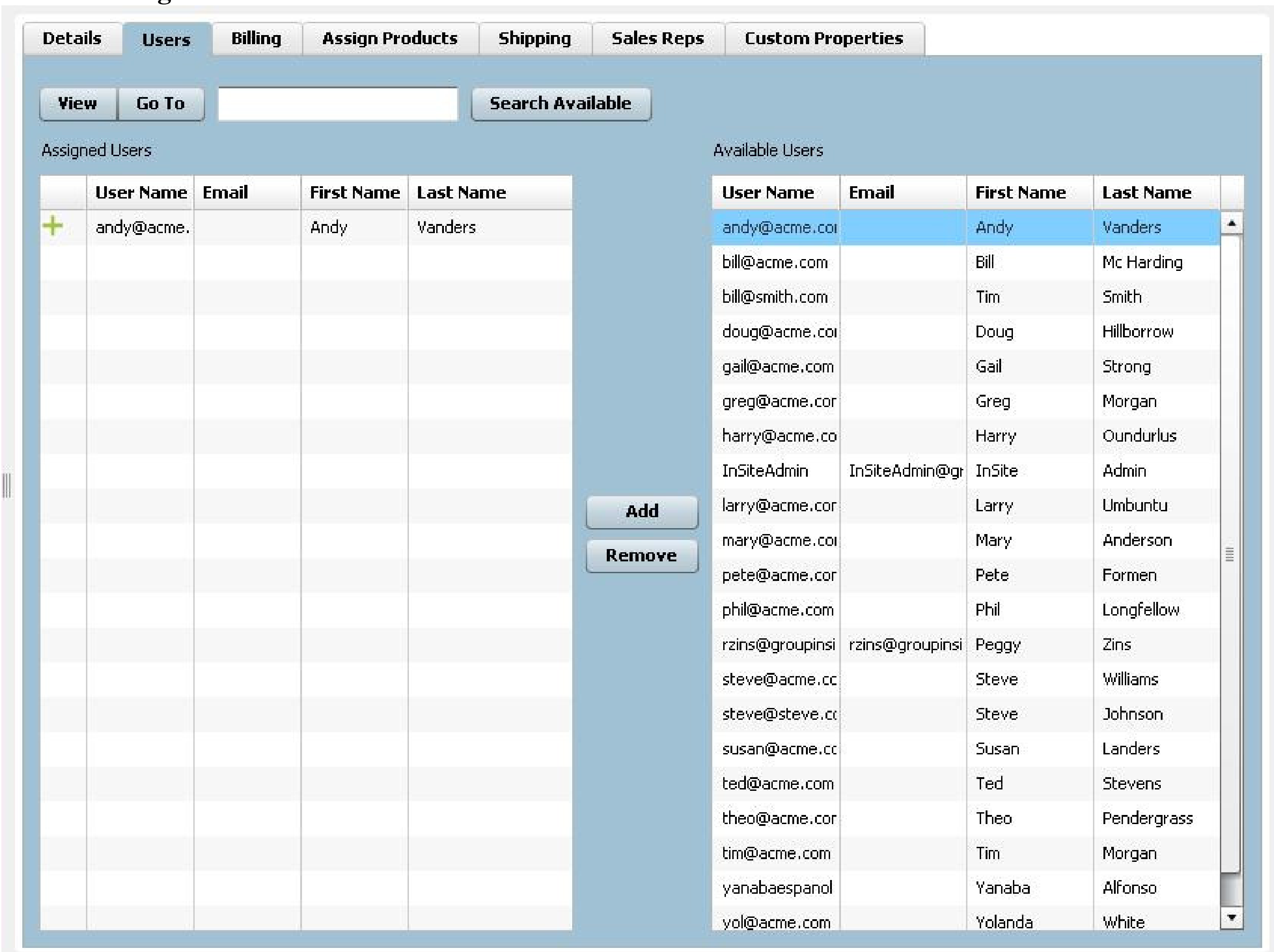


Field Name	Description
Refresh from ERP	Synchs the individual Customer record data in the Management Console with that in your ERP
Customer Information	
Customer Number	Automatically assigned Customer number. Created either by ERP and then refreshed, or by website. Customer number formatting can be managed via Application Settings
ERP Number	Customer’s number in ERP, if different from above
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 address
Address 2	Second line of address
Address 3	Third line of address
City	City for address

State	State/Province of address
Postal Code/Zip	Zip/Postal code of address
County	County of address. Optional
Country	Country of address
Ship To/Sequence	Indicates if the customer record is for their main/bill-to address (generally sequence 0) or a 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*

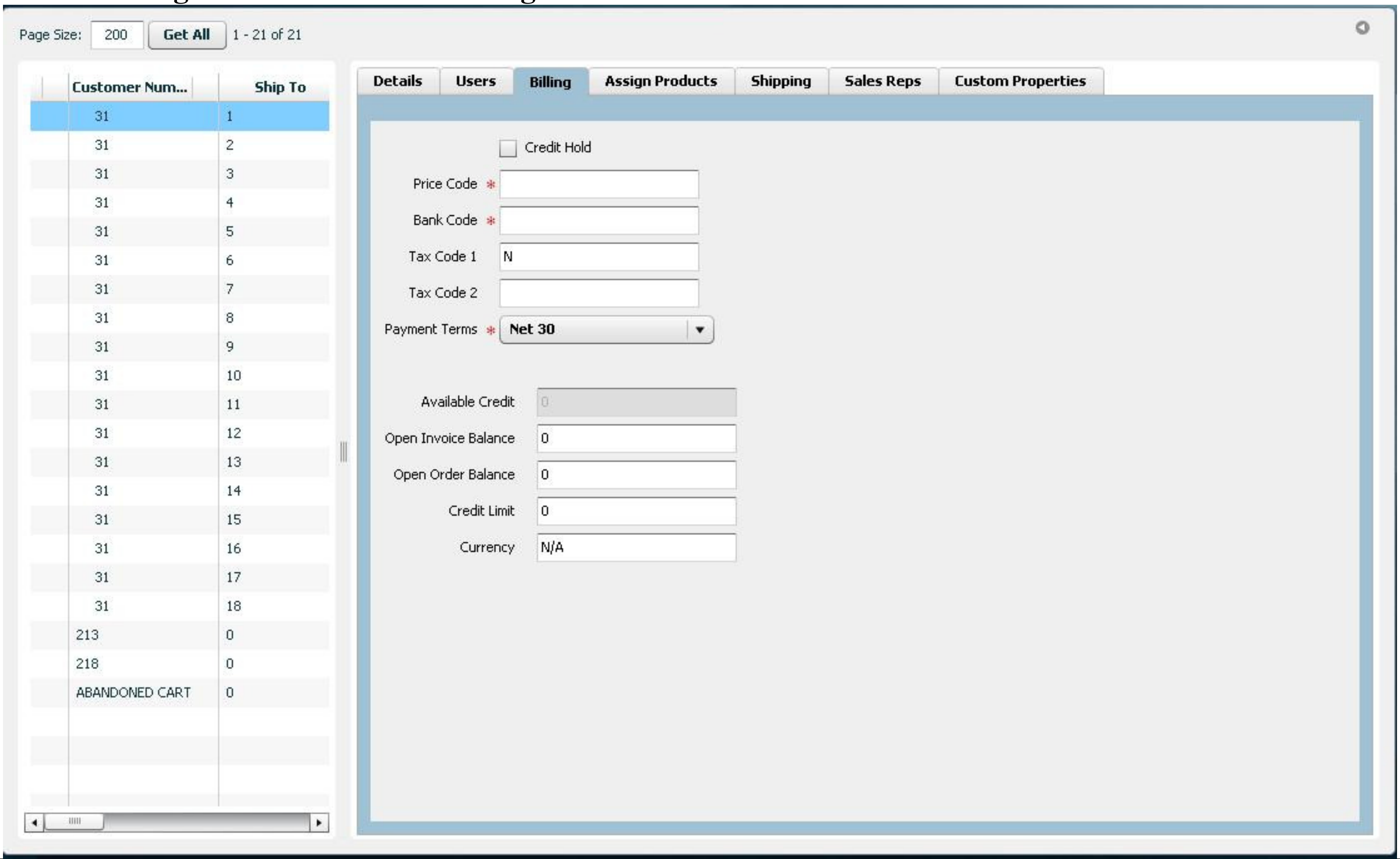
***May require advanced features and/or integration customizations**

Global Management>Customers: Users



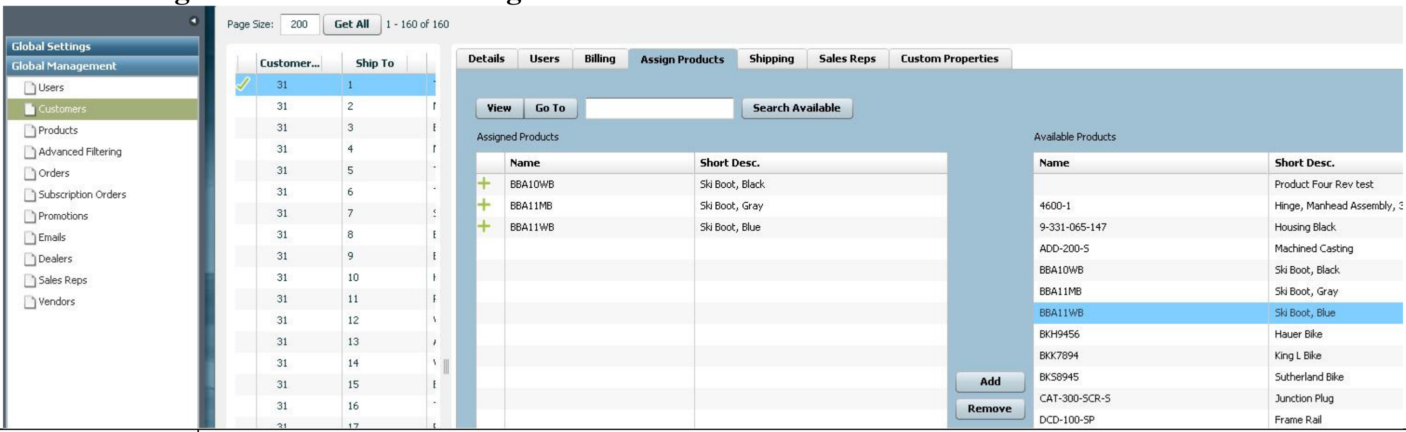
Field Name	Description
View	Will pop-up a quick-view window displaying the User Details for the selected, Assigned User
Go To	Direct navigation away from Customers, to the User record for the selected Assigned User
Search Available	Searches all available Usernames, Emails, First and Last Names. Uses 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



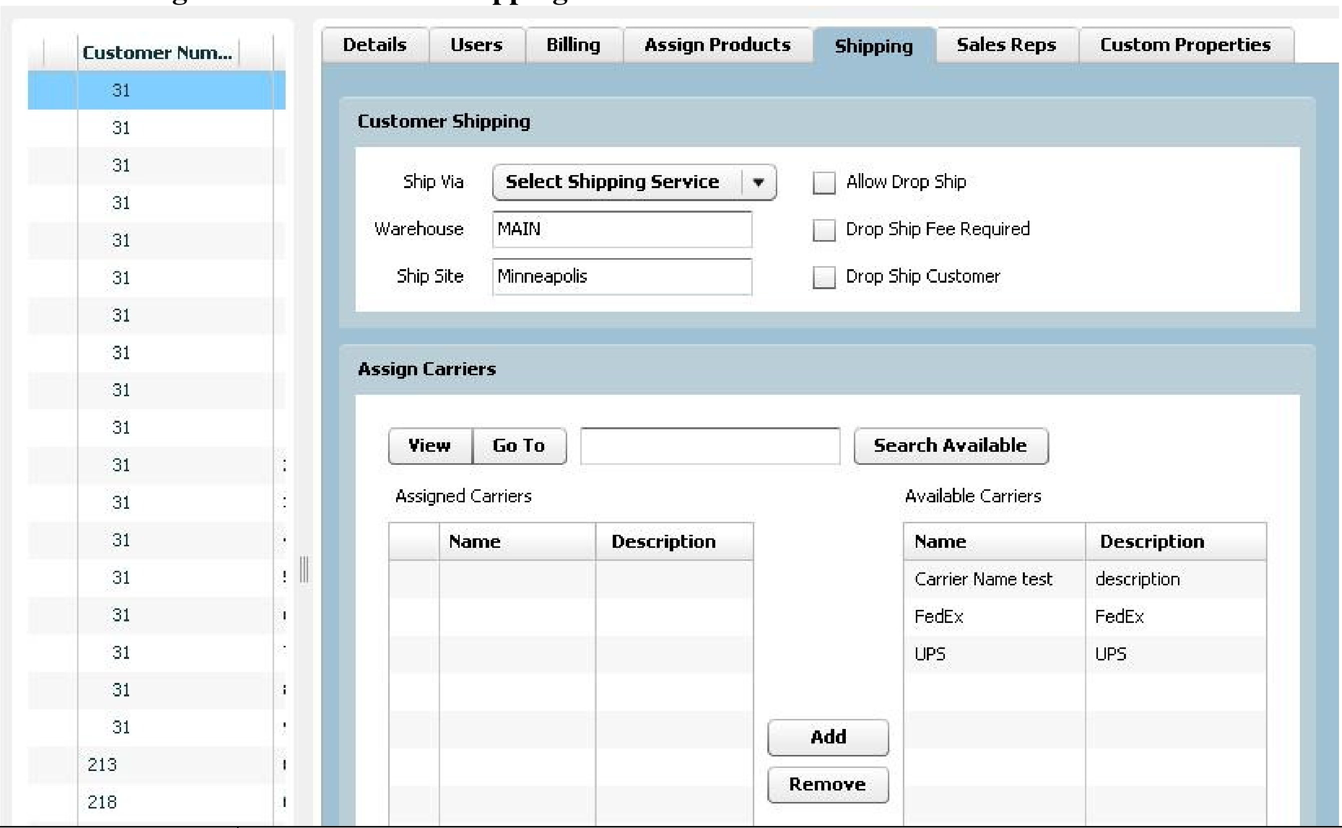
Field Name	**Description**
Credit Hold	Flags Customer as being on hold. May be used to execute customized business rules regarding order submission
Price Code	Code used for pricing calculations
Bank Code	Code used for cash receipts or G/L routing
Tax Code 1	Code for tax calculations
Tax Code 2	Optional code for tax calculations
Payment Terms	Customer's specific terms, such as Net 30, Credit Card, etc.
Available Credit	Automatically calculated. Credit limit minus Open Invoice Balance minus Open Order Balance
Open Invoice Balance	Dollar total of all unpaid invoices
Open Order Balance	Dollar total of all placed orders that have not yet shipped/invoiced
Credit Limit	Dollar value of Customer's credit limit
Currency	Currency code if required

Global Management>Customers: Assign Products



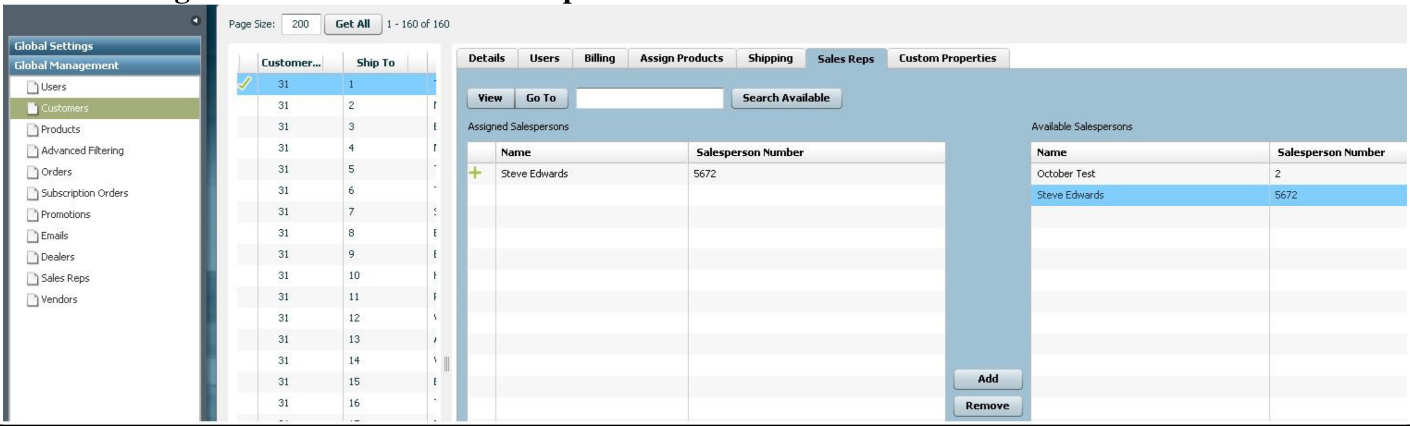
Field Name	Description
View	Will pop-up a quick-view window displaying the Product Details for the selected, Assigned Product.
Go To	Direct navigation away from Customers, to the Product record for the selected Assigned Product
Search Available	Searches all available Product Names, ERP Numbers and Short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

Global Management>Customers: Shipping



Field Name	Description
Customer Shipping Section	
Ship Via	Optional Customer specific shipping service. Must coordinate with Assigned Carriers
Warehouse	Optional ERP warehouse code, if Customer is to receive inventory from a specific warehouse
Ship Site	Optional field for ship-from location specification
Allow Drop Ship	Flags Customer as allowed to place drop-shipping orders
Drop Ship Fee Required	Adds flat-rate drop-ship fee
Drop Ship Customer	Flags Customer as a drop-ship only. Often used on Ship-To addresses in distributor scenarios. Site design and business-rules specific
Assign Carriers Section	
View	Will pop-up a quick-view window displaying the Carrier Details for the selected, Assigned Carrier.
Go To	Direct navigation away from Customers, to the Carrier record for the selected Assigned Carrier
Search Available	Searches all available Carrier Names and Descriptions. Uses an * for wildcard searching
Assigned Carriers	Carriers associated with the particular Customer.
Available Carriers	Active Carriers that may be assigned to Customers.
Add	Moves one or many Available Carriers to the Assigned Carrier field and makes the Customer 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 Carrier field. Drag-and-Drop may also be used instead of the button.

Global Management>Customers: Sales Reps



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

***May require implementation of optional Advanced Module**

Global Management>Customers: Custom Properties*

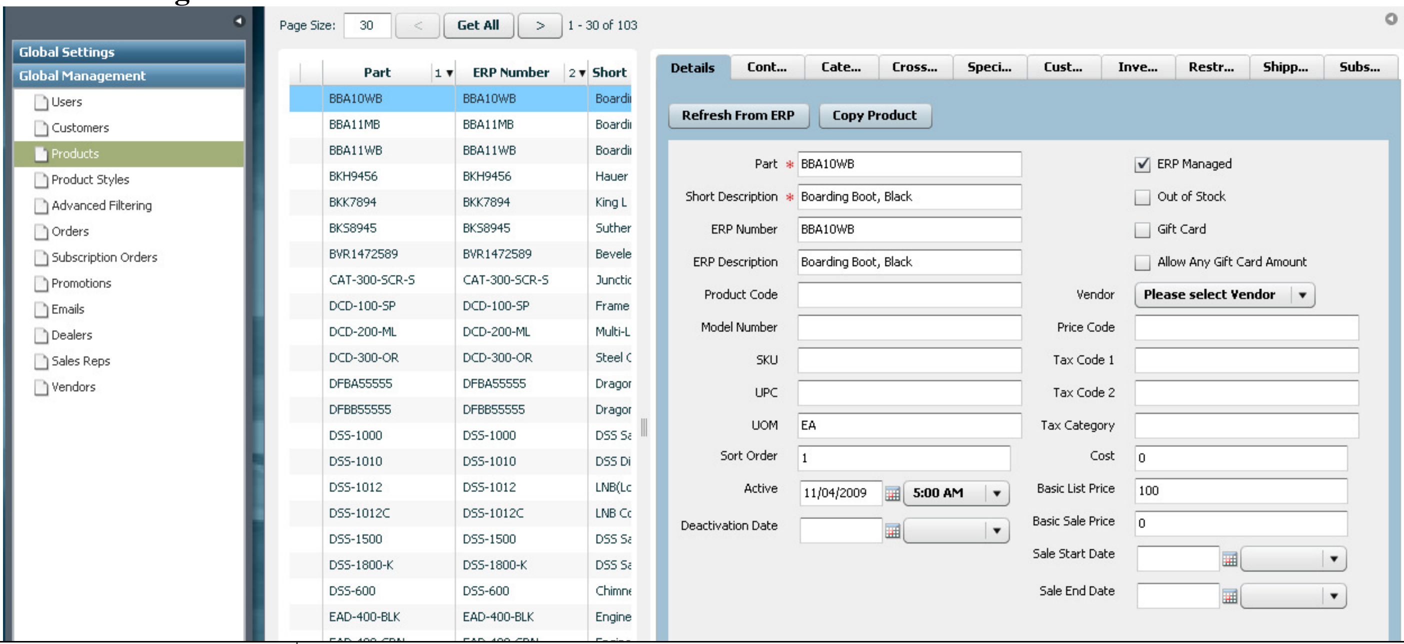
Field Name	**Description**
Add	Adds a new Custom Property Record.
Delete	Flags the selected Custom Property for deletion. Delete will execute upon clicking the top Save button.
Name	Name of the individual custom property.
Value	Property value, used to drive customizations.

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

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

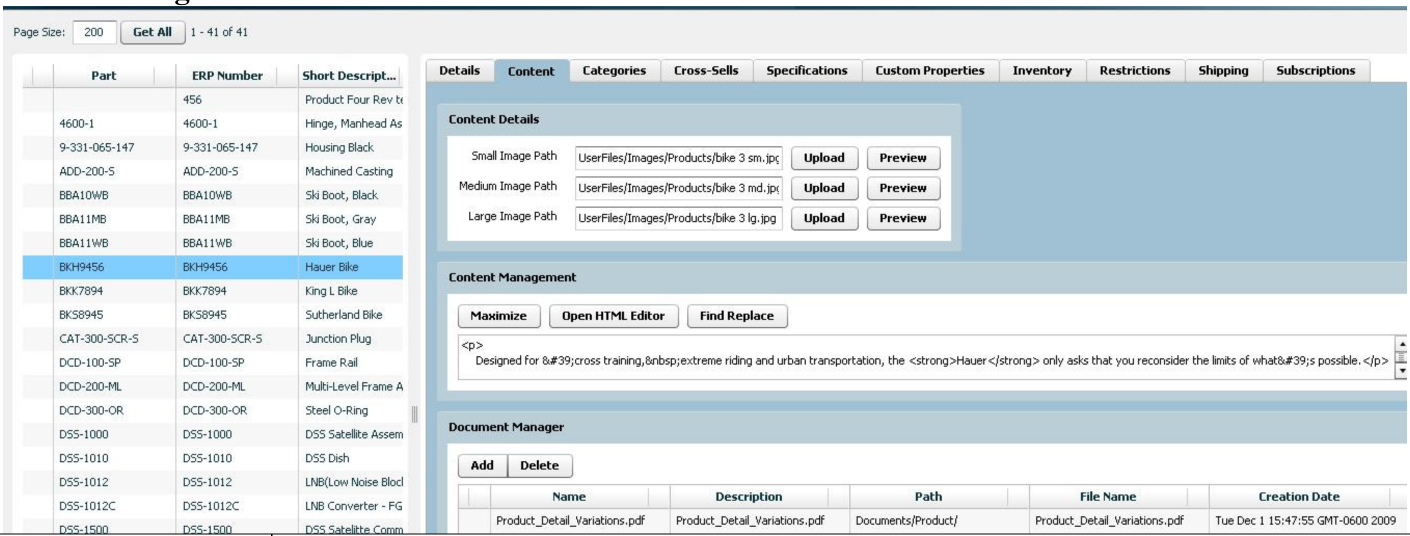


Field Name	Description
Refresh From ERP	Allows an individual product to be updated with ERP data, rather than waiting for the scheduled batch process
Copy Product	Manually creates a duplicate product. Copies all available product data. New item is identified by the word “Copy” being appended to the Part/Name
Part/Name	Product part number or name
Short Description	Generally the extended product name, without abbreviations. Should be unique as often used to automate creation of Page Titles for SEO
ERP Number	Product part number from ERP system if different from Part/Name
ERP Description	Product description from ERP system if different from Short Description
Product Code	Additional optional field for product coding
Model Number	Additional optional field for product coding
SKU	Stock Keeping Unit
UPC	Universal Product Code
Sort Order	Rank at which the Product displays within its assigned Product Category
Active	Date at which product is active for purchasing. A time may be specified: Defaults to 12:00 AM if blank in refresh or import.
Deactivation Date	Date at which product is no longer active for purchasing. A time may be specified: Defaults to 12:00 AM if blank in refresh or import.
ERP Managed	Indicates the product data is managed via the scheduled integration service
Out of Stock	Indicates product inventory has dropped below safety stock
Gift Card*	Indicates product is a gift card/certificate, eligible for redemption as a payment option, rather than a typical item

Allow Any Gift Card Amount*	Used for sites where gift card/certificate amount can be defined by the shopper, rather 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

***May require implementation of optional Advanced Module**

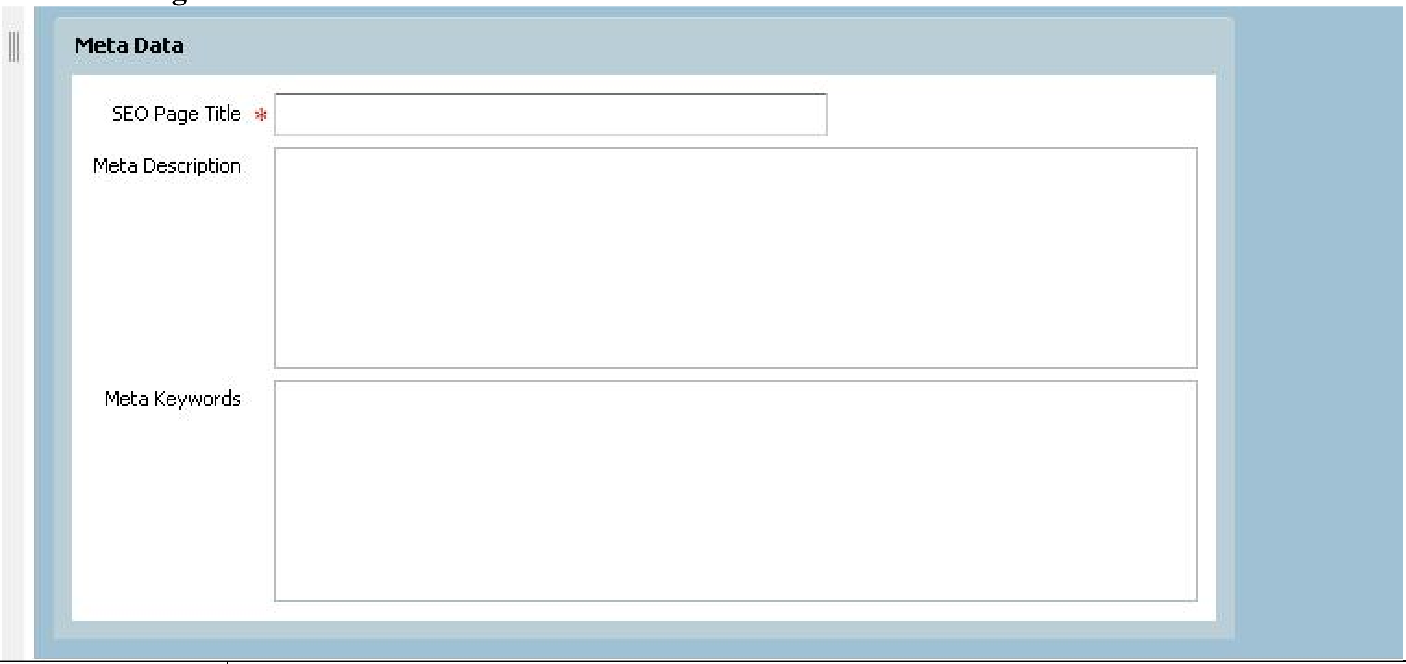
Global Management>Products: Content I



Field Name	**Description**
Content Details Section	
Small Image Path	Calls out the smallest image associated with the Product. Often a thumbnail displayed in the Shopping Cart
Medium Image Path	Calls out a medium image. Usually displayed on Category and Search Result pages
Large Image Path	Calls out the largest image of the Product. Usually displayed on the Product Detail page
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 Management Section	
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

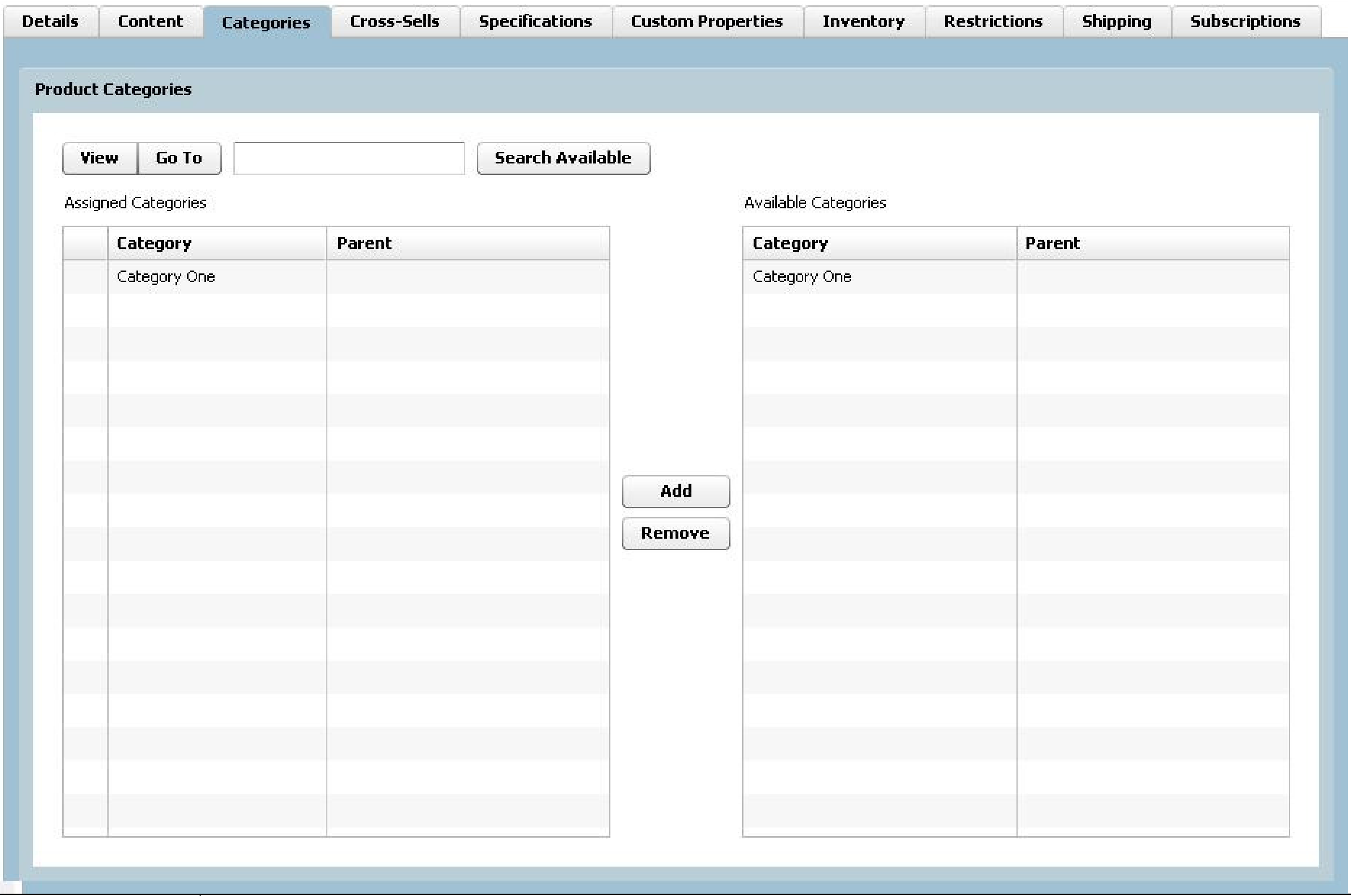
Content Area	Field used to store the specified content. Default display is HTML, but end-user display may be previewed by opening the HTML Editor
Document Manager Section	
Add	Pops up a browser session so a new document can be added to the Product
Delete	Flags the document record for deletion
Name	Document name
Description	Document description, displays on website
Path	File manager/webserver data storage path
File Name	File name if different from general document name
Creation Date	Date when document was added/upload

Global Management>Products: Content II



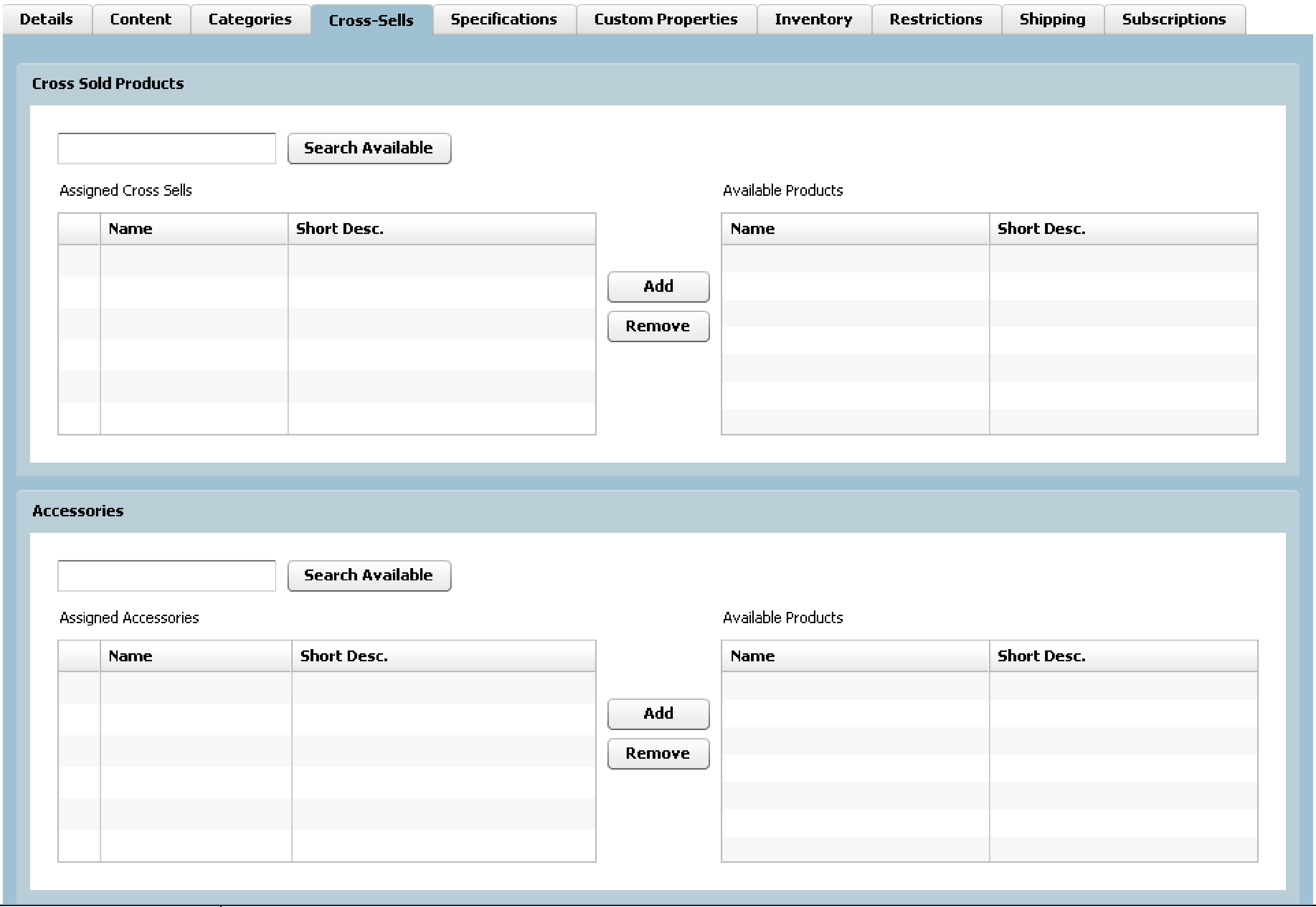
Field Name	Description
Meta Data Section	
Page Title	Page title to display at top browser. SEO friendly. Limited to 72 char
Meta Description	Description to display on SRPs. SEO friendly. Limited to 185 char
Meta Keywords	Meta Tags or Keywords for SEO/SEM

Global Management>Products: Categories



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 Available	Searches all available Category names. Uses an * for wildcard searching
Assigned Categories	Categories in which the select Product appears
Available Categories	Active Categories that may be assigned to Products
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



Field Name	Description
Cross Sold Products	
Search Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for wildcard searching
Assigned Products	Cross Sold Products that display on the selected Product detail page
Available Products	Search results from Search Available function of Products that may be assigned as Cross 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

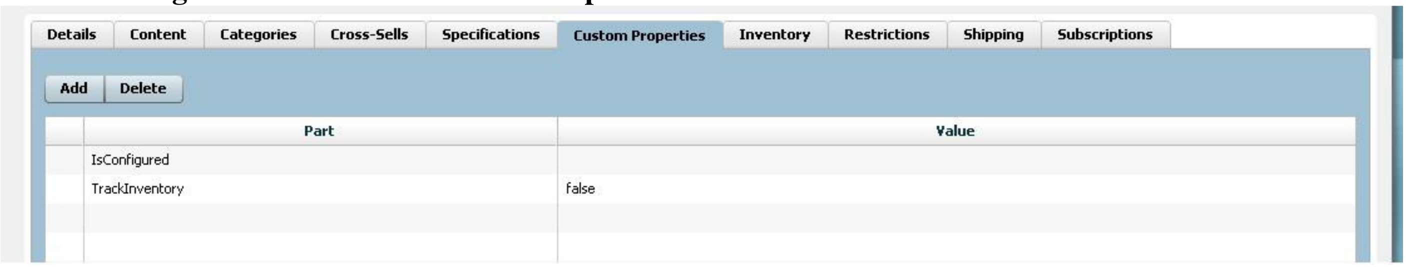
Accessories	
Available Accessories	Search results from Search Available function of Products that may be assigned as Accessories
Add	Moves one or many Products to the Assigned Products field and makes the Cross Sell association. Drag-and-Drop may also be used instead of the button
Remove	Removes one 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

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 Management	
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

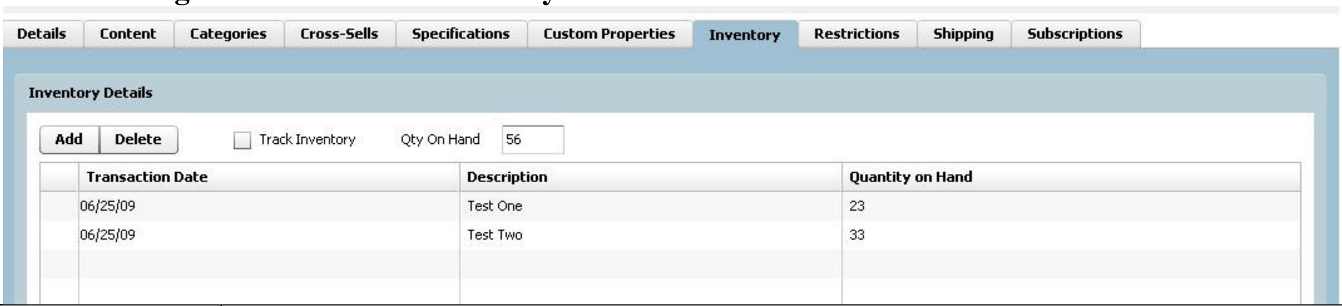
Global Management>Products: Custom Properties*



Field Name	Description
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



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	Date at which the inventory transaction was rolled up
Description	Describes the type of inventory transaction
Quantity on Hand	Quantity on hand as of the specified transaction

Global Management>Products: Restrictions

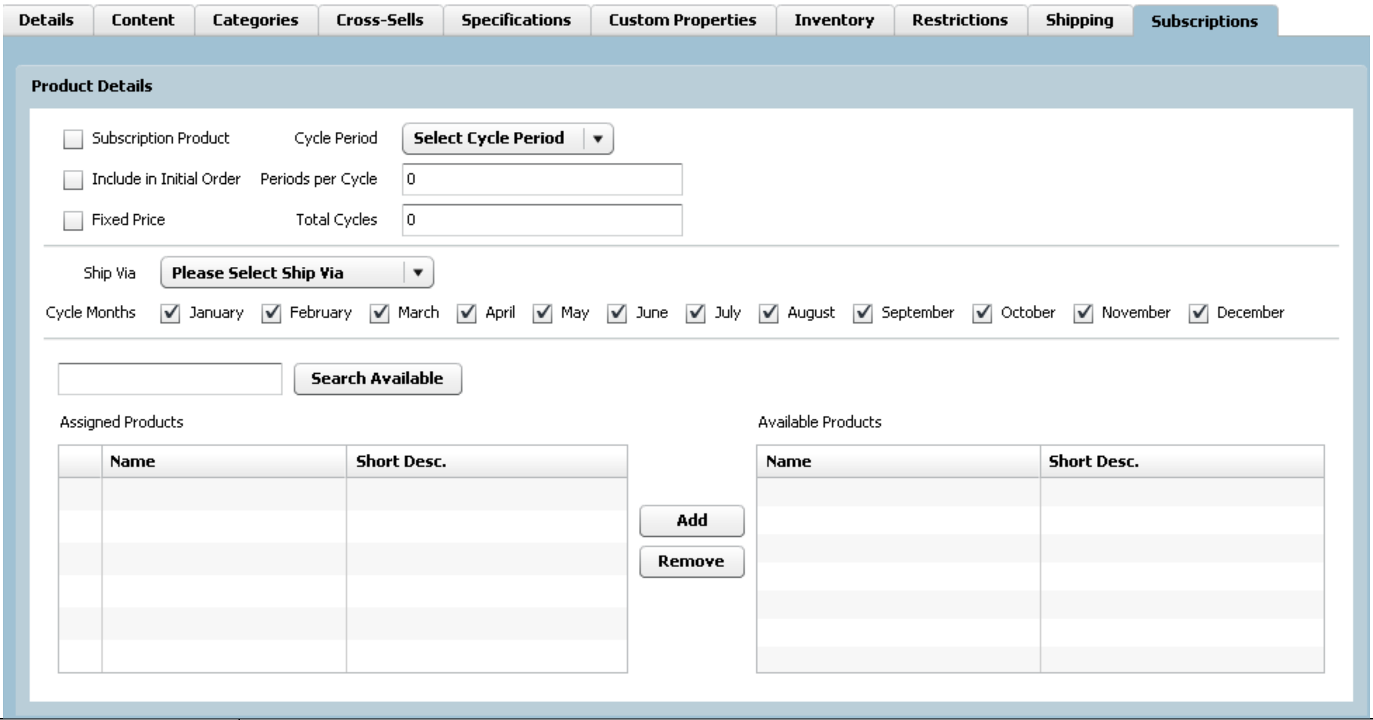
Field Name	Description
Add	Creates a new restriction record on the selected Product
Delete	Flags a selected restriction record for deletion
Name	Name of the particular restriction
State	State from which the Product is restricted
Is Active	Flags restriction as active, limiting product availability

*** May require implementation of advanced features**

Global Management>Products: Shipping

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 Override	Optional freight charge override per product
Handling Amount Override	Optional handling charge override per product
Classification	Optional coding field for regulatory classification: DOT, IATA, etc

Global Management>Products: Subscriptions*



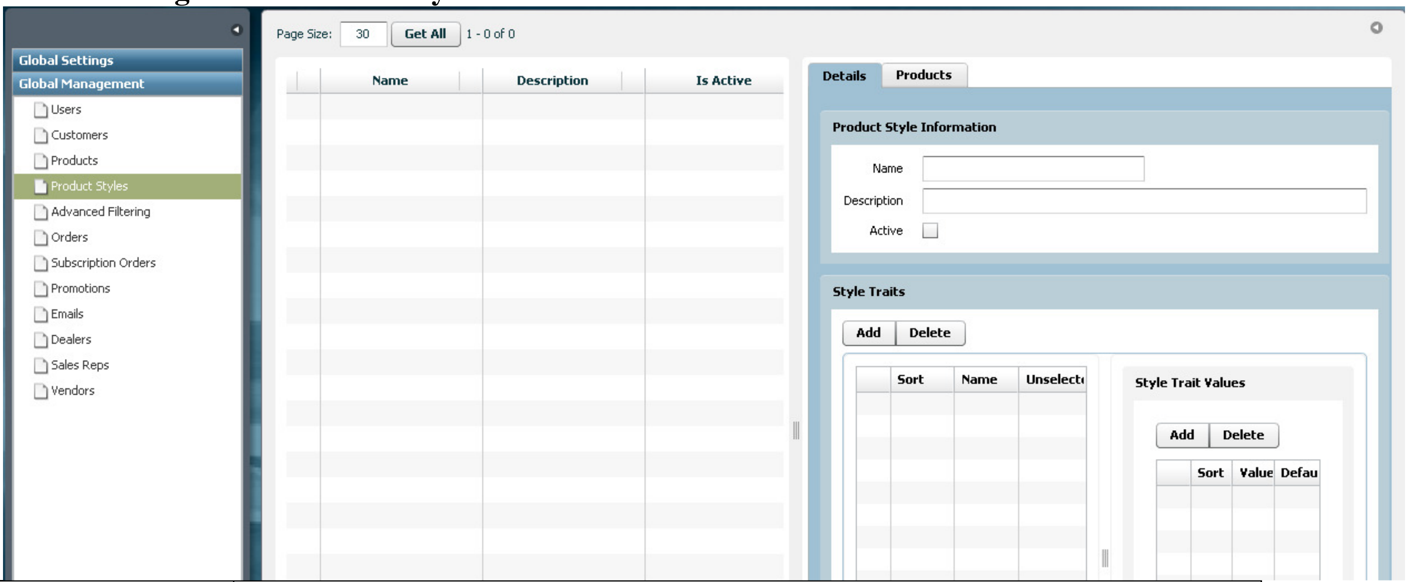
Field Name	Description
Subscription Product	Indicates that the Product is a subscription, with subsidiary, associated Products
Include in Initial Order	Flags subscription to be shipped with originating order
Fixed Price	Indicates that the subscription price remains fixed, throughout the total cycle length, 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	Products associated with the current subscription
Available Products	Search results from Search Available function of Products that may be associated with a 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

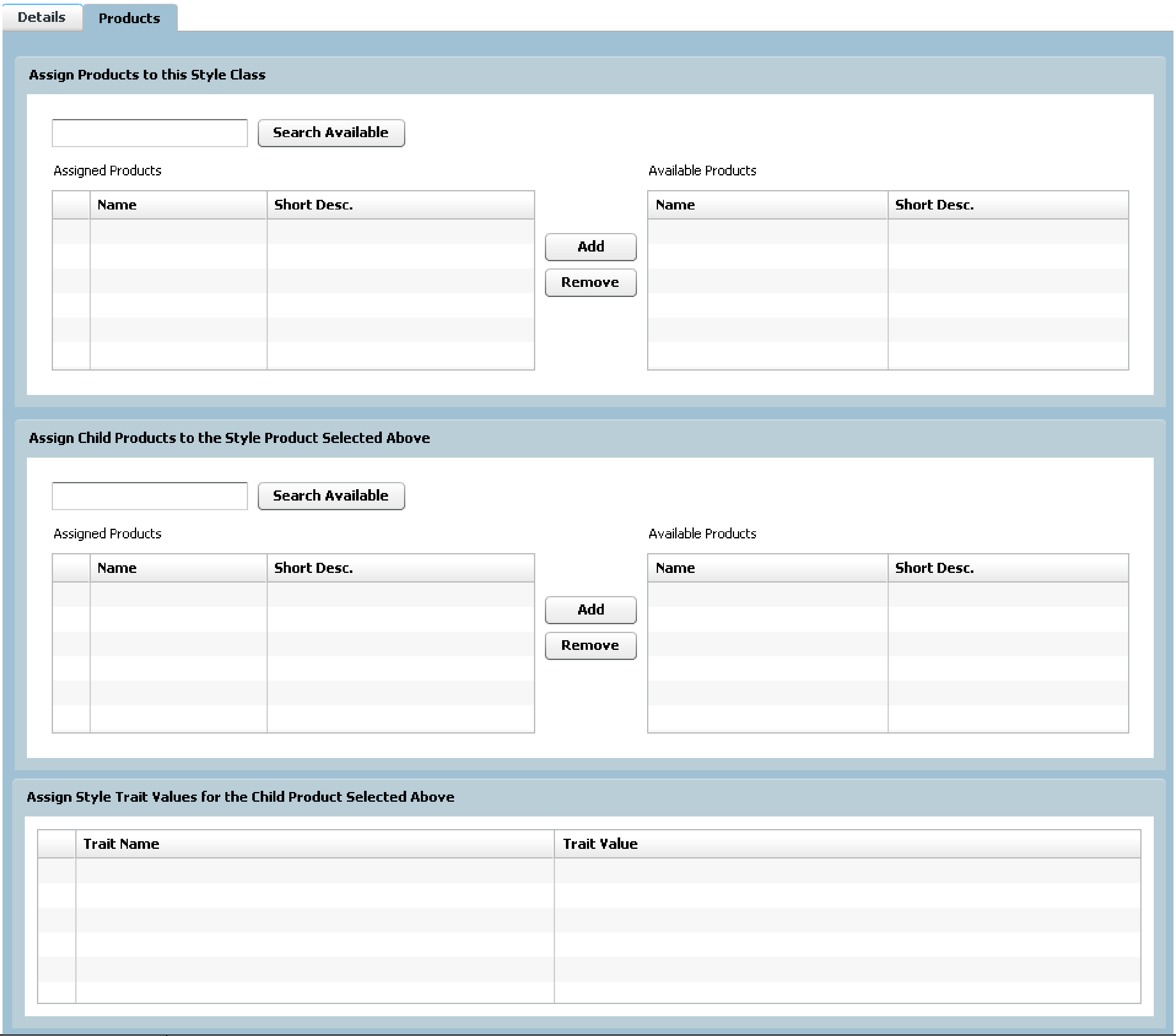
Product Styles is an optional feature, allowing the management of traits and variables per product, by group. The most common example of this functionality is apparel, where shoppers select size and color on a single product page, in order to determine an individual item SKU.

Global Management>Product Styles: Details



Field Name	**Description**
Product Style Information	
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: Products



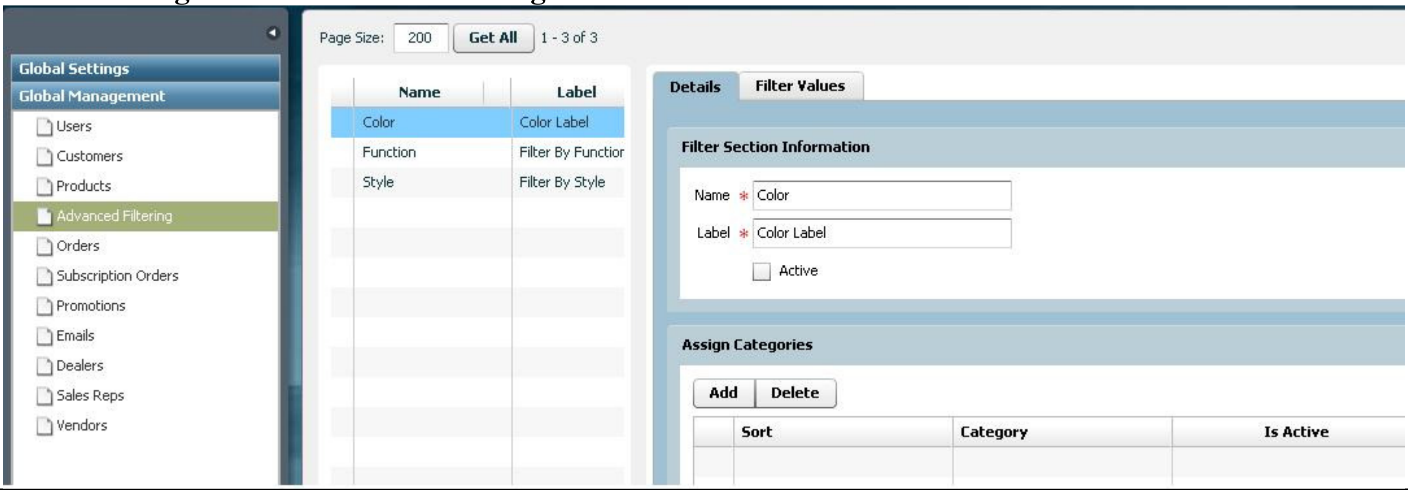
Field Name	Description
Assign Products To This Style Class	
Search Available	Searches all available Product Names and Short Descriptions. Uses an * for wildcard searching
Assigned Products	Parent product(s) assigned to the selected Style Class, such as Men's Polo Shirt
Available Products	Search results 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 Products to the Style Product Selected Above	

Search Available	Searches all available Product Names and Short Descriptions. Uses an * for wildcard searching
Assigned Products	Child products assigned to the Parent style selected above
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 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 Trait 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*

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.

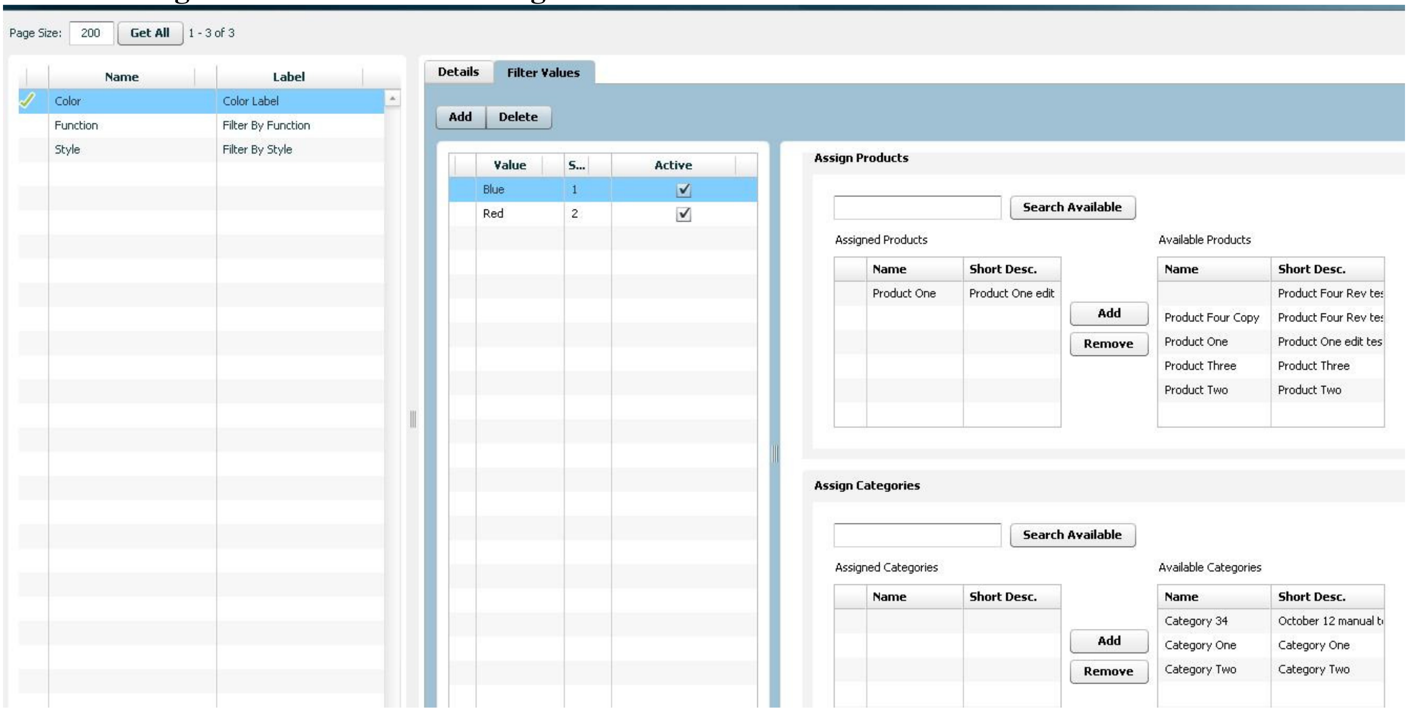
Global Management>Advanced Filtering: Details



Field Name	**Description**
Filter Section Information	
Section Name	Internal name for product characteristic 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 Categories	
Add	Creates a new Category/Filter Section assignment
Delete	Flags a category for deletion from the Filter Section
Sort	Order in which the selected Category is to appear in the Filter Section
Category	Dropdown of active Categories that may be assigned to the Filter Section
Is Active	Flags Category as an active element of the Filter Section

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

Global Management>Advanced Filtering: Filter Values



Field Name	Description
Filter Value Details	
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 Available	Searches all available products to which the value may be applied. Uses an * for wildcard searching
Assigned Products	Products that are assigned the selected Filter Value
Available Products	Active Products that may be assigned to the filter
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 Categories	
Search Available	Searches all available categories to which the value may be applied. Uses an * for wildcard searching
Assigned Categories	Categories that are assigned the selected Filter Value
Available Categories	Active Categories that may be assigned to the filter
Add	Moves one or many Categories to the Assigned Categories field and makes the filter value

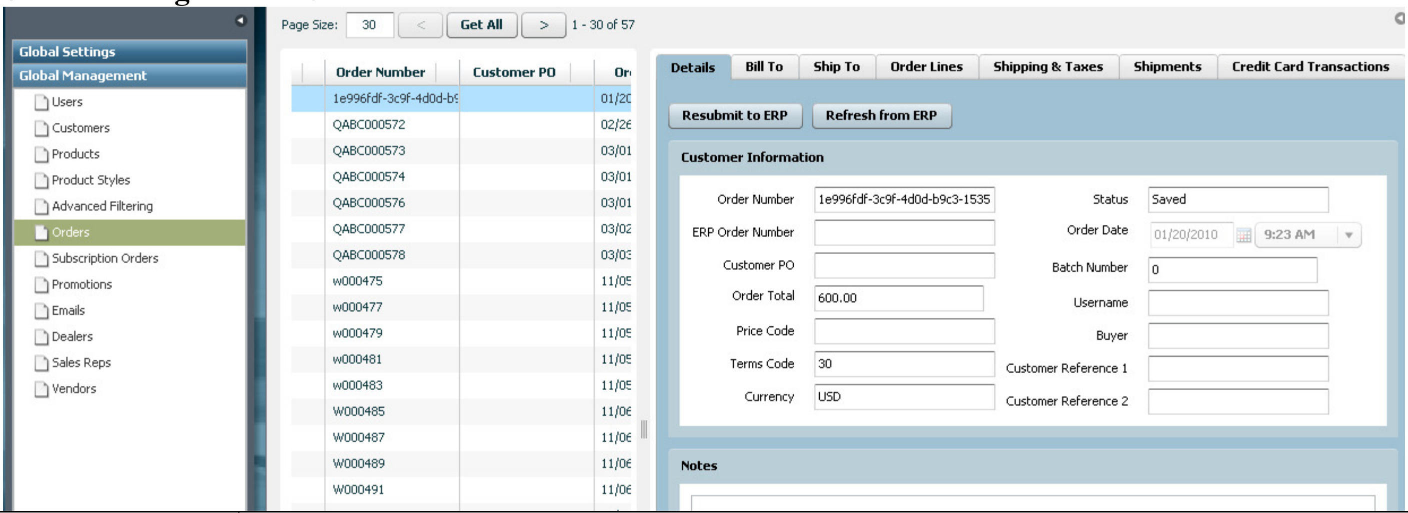
	association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many filter associations and sends them back to the Available Categories field. Drag-and-Drop may also be used instead of the button

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

Orders

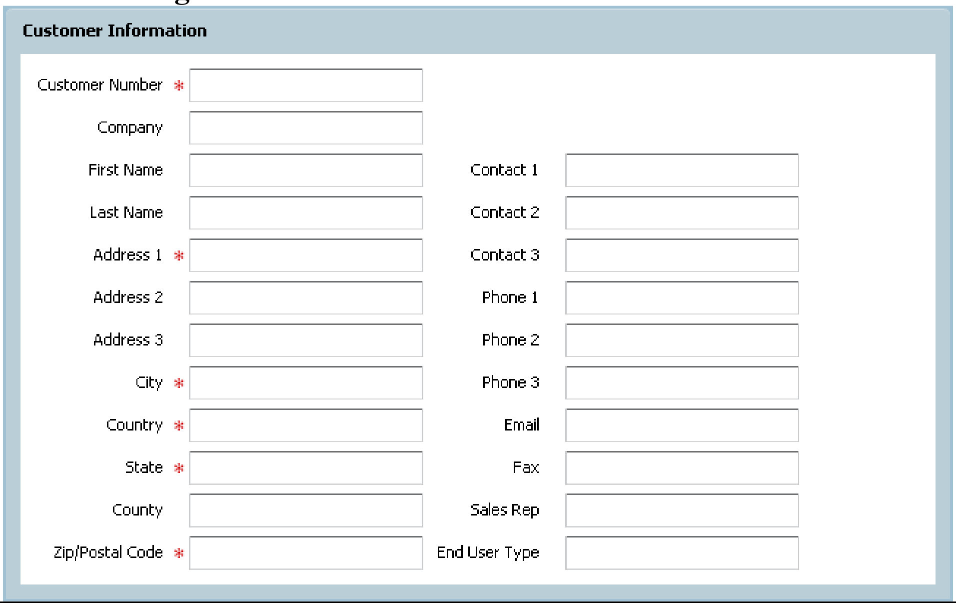
Orders are fully integrated with your ERP, submitted in frequent batch processes. Order header and line item detail records are all available in the Management Console.

Global Managements>Orders: Details



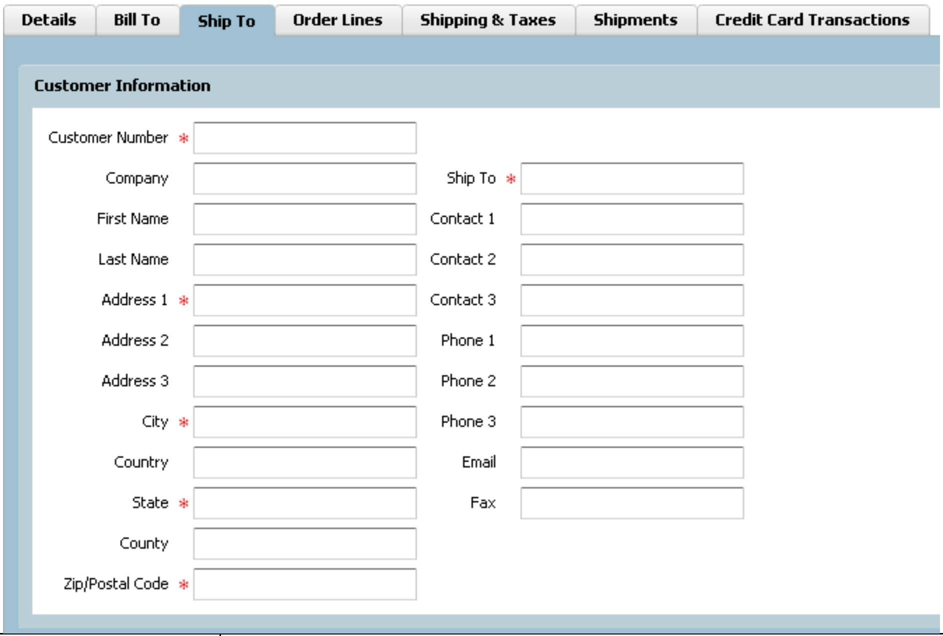
Field Name	Description
Resubmit to ERP	Submits the individual, selected order, rather than waiting for batch process
Refreshfrom ERP	Refreshes the individual, selected order, rather than waiting for batch process
Order Number	Unique order number, created by Commerce. May or may not be the same as ERP Order Number, depending on implementation specific requirements
ERP Order Number	Unique order number, created by ERP. May or may not be the same as Commerce Order Number, depending on implementation specific requirements
Customer PO	Customer specified purchase order number
Order Total	Total charges: Product subtotal + Freight + Tax + Miscellaneous Charges - Discounts
Price Code	Order specific code used for pricing calculation
Terms Code	Order specific payment terms code. Often defaulted from Customer
Currency	Order specific currency code
Status	Order status, such as: Pending, Submitted, Shipped, Complete
Order Date	Date and time the order was placed
Batch Number	Commerce submission batch number
Username	Username for logged in account responsible for placing order
Buyer	Optional field for Buyer name
Customer Reference 1	Optional, order and customer specific reference number
Customer Reference 2	Optional, order and customer specific reference number
Notes	Optional, order specific notes

Global Managements>Orders: Bill To



Field Name	**Description**
Customer Number	Automatically assigned Customer number. Created either by ERP and then refreshed, or by 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 Code	Zip/Postal code of billing address
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 Type	Customer coding field. Often used for reporting purposes

Global Managements>Orders: Ship To



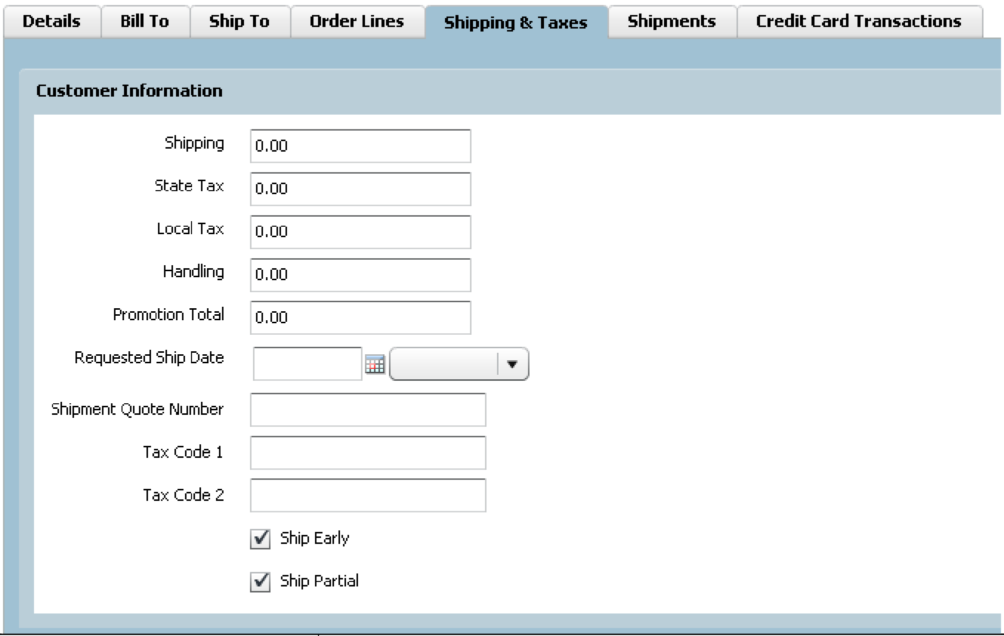
Field Name	Description
Customer Number	Automatically assigned Customer number. Created either by ERP and then refreshed, or by website. Customer number formatting can be managed via Application Settings
Company	Company for B2B commerce. May also be used for B2C situations (E.G.: Consumer shipping address 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 To	Indicates if the customer record is for the ship to address is the same as the billing address (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
Email	Primary email address for Customer's delivery location
Fax	Primary fax number for Customer's delivery location

Sales Rep	Optional assigned Sales Representative name or code
End User Type	Customer coding field. Often used for reporting purposes

Global Managements>Orders: Order Lines

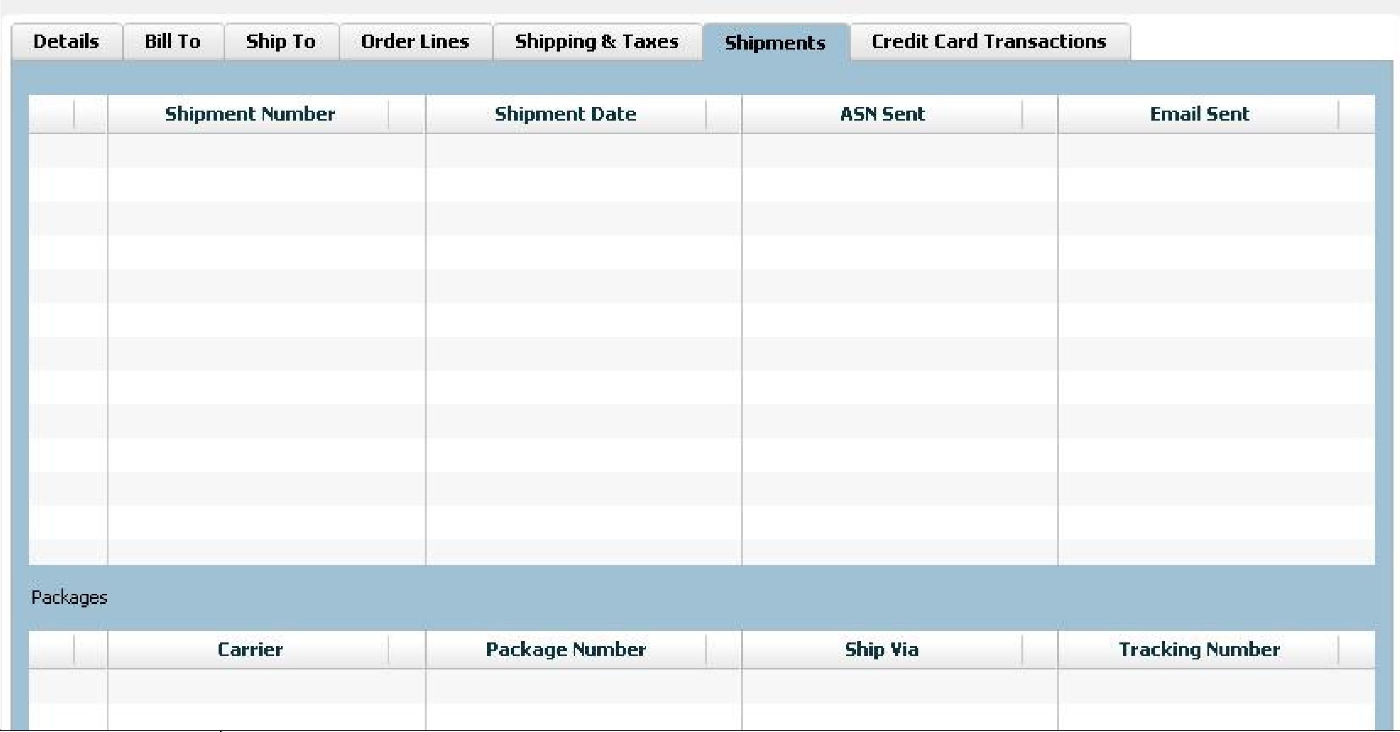
Field Name	**Description**
Status	Status of the specific line. Ordered, shipped, reserved, etc. Implementation specific
Line	Item line number
Release	Optional specified release
Product Name	Product/Part name
Description	Product Short Description
Qty Ordered	Quantity ordered per line
Qty Shipped	Quantity 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



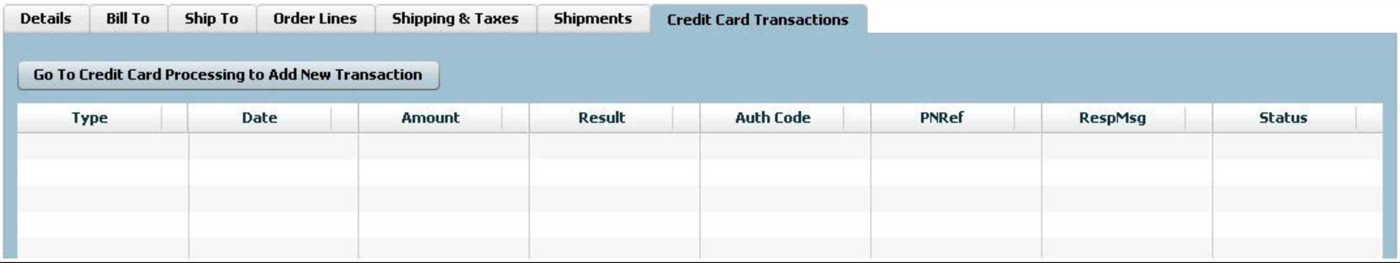
Field Name	**Description**
Shipping	Any freight fees charged to order
State Tax	Any State-based tax charged to order
Local Tax	Any Zip/Postal Code based tax charged to order
Handling	Any additional handling fees charged to order
Promotion Total	All product and freight discounts applied to order
Requested 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 Number	Shipping quote reference number, if applicable
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

Global Managements>Orders: Shipments



Field Name	Description
Shipment Number	Shipment identification number
Shipment Date	Date of primary shipment
ASN Sent	Optional flag if shipment integration includes advanced shipping notifications
Email Sent	Optional flag if shipment integration includes shipment confirmation emails
Carrier	Specific Carrier of shipment, such as FedEx, UPS, etc.
Package Number	Optional package ID. Often used to identify specific boxes when a shipment may consist of multiple packaged
Ship Via	Carrier's shipping service code, such as 1Day, 2Day, Ground, etc.
Tracking Number	Carrier assigned tracking number per package

Global Managements>Orders: Credit Card Transactions



Field Name	**Description**
Go To Credit Card Processing	Navigates away from Orders to Credit Card Processing, facilitating additional tasks such as manual delayed capture processing
Type	Credit card transaction type such as Authorization or Sale
Date	Date of each credit card transaction associated with the order
Amount	Type of each credit card transaction associated with the order
Result	Result code of each transaction
Auth Code	Payment processor specific authorization code for each credit card transaction
PN Ref	Transaction reference number from payment gateway
RespMsg	Response sent from payment gateway
Status	Transaction status as assigned by payment gateway, such as approved, declined, etc.

Subscription Orders*

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

Global Management>Subscription Orders: Details

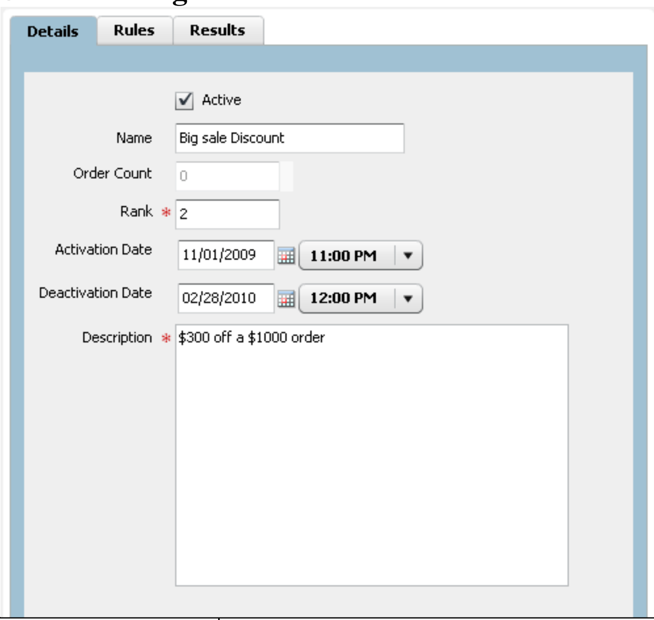
Field Name	Description
Order Number	Unique order number, created by Commerce. May or may not be the same as ERP Order Number, depending on implementation specific requirements
Customer Number	Automatically assigned Customer number
Customer Name	Subscription Customer. May be a Company name or First: Last 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 Cycle	Number of days or months that constitute the subscription
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 Order	Flags subscription as an element of the Customer's first order

***May require implementation of optional Advanced Module**

Promotions

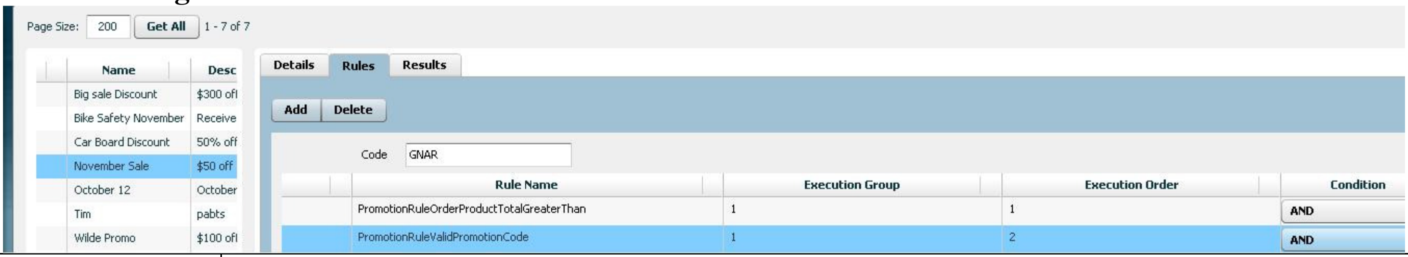
Promotions allow a wide variety of consumer, dealer and distributor incentivizing. (Please see the Promotion Rule and Result Indices for more information)

Global Management>Promotions: Details



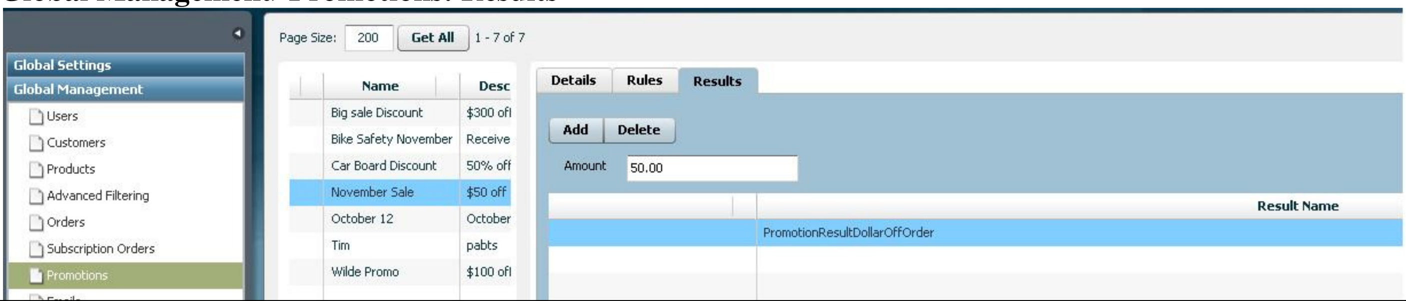
Field Name	**Description**
Active	In conjunction with activation date, flags promotion as active
Name	Promotion name. May be used for website display and reporting
Order Count	Number of orders placed against the promotion. If greater than 1, promotion cannot be deleted
Rank	Order in which the promotion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

Global Management>Promotions: Rules



Field Name	Description
Add	Pops up a list of available promotion rules for the selection of a new rule record
Delete	Flags a promotion rule for deletion
Rule Detail Area	(Code field in above example) Dynamic area, updated per rule selected, for entry of detailed parameters per promotion rule
Rule Name	Auto-filled with the name of the rule selected in the Add pop-up
Execution Group	Group sorting number for parenthetical promotion rule set-up
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

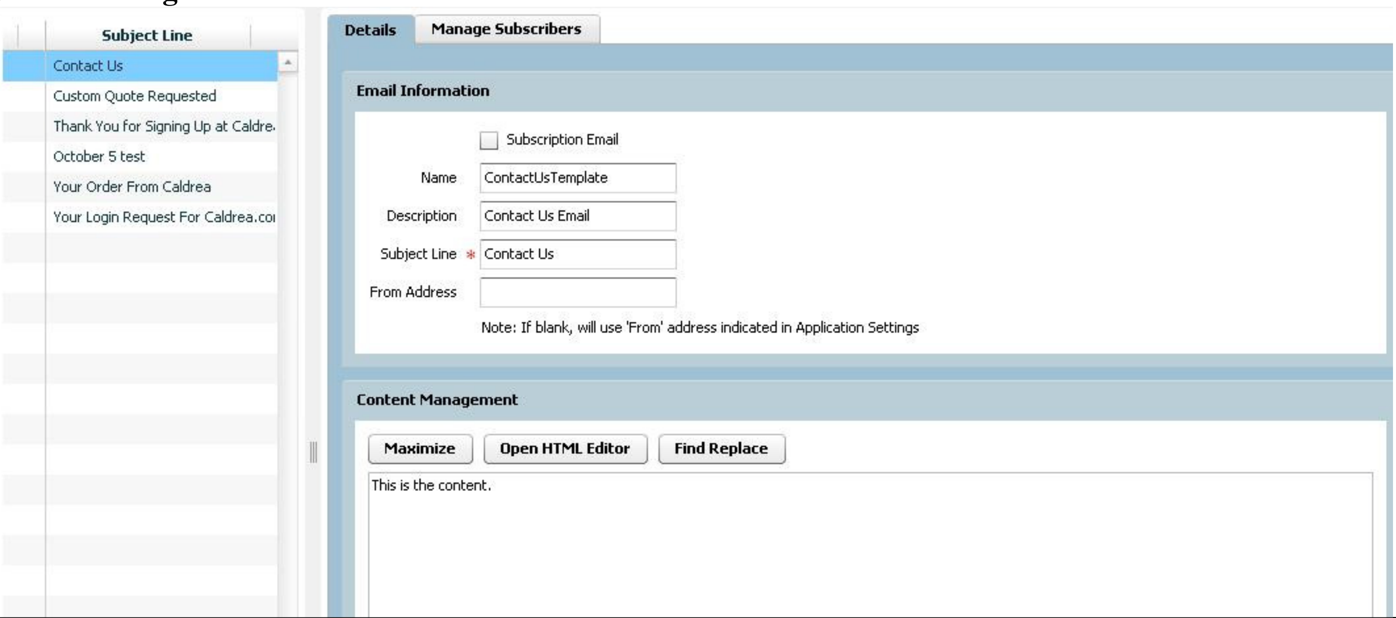


Field Name	Description
Add	Pops up a list of available promotion results for the selection of a new result record
Delete	Flags a promotion result for deletion
Result Detail Area	(Amount field in above example) Dynamic area, updated per result selected, for entry of detailed parameters per promotion result
Result Name	Auto-filled with the name of the result selected in the Add pop-up

Emails

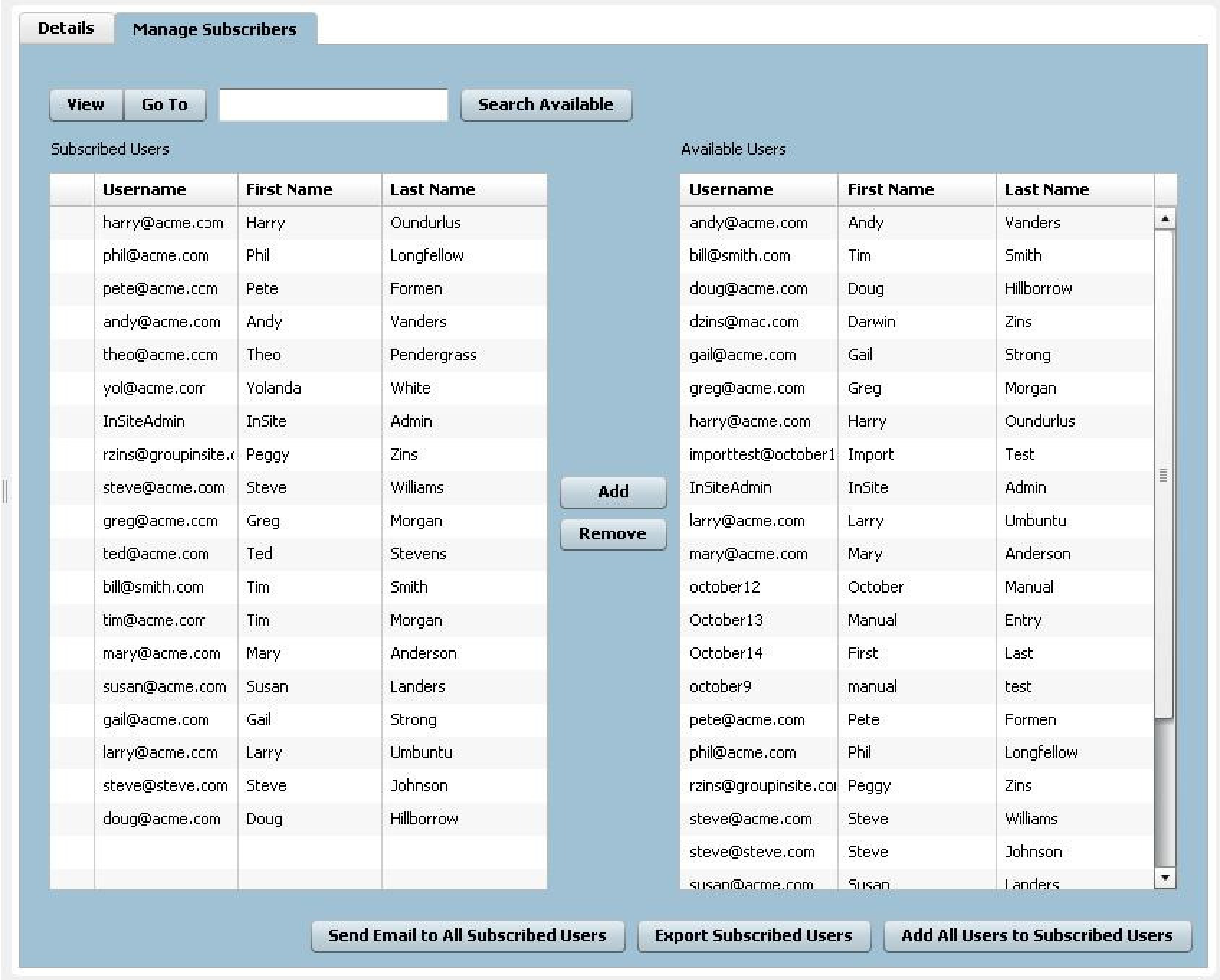
This is where you can manage transactional emails like Order Confirmations and Notifications. Marketing emails can also be managed here, or subscriber lists can be exported to a third-party ESP.

Global Management>Emails: Details



Field Name	Description
Email Information	
Subscription Email	Flags subscription as requiring an opt-in (like a newsletter), rather than being transactional (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 Management Section	
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>Emails: Manage Subscribers*

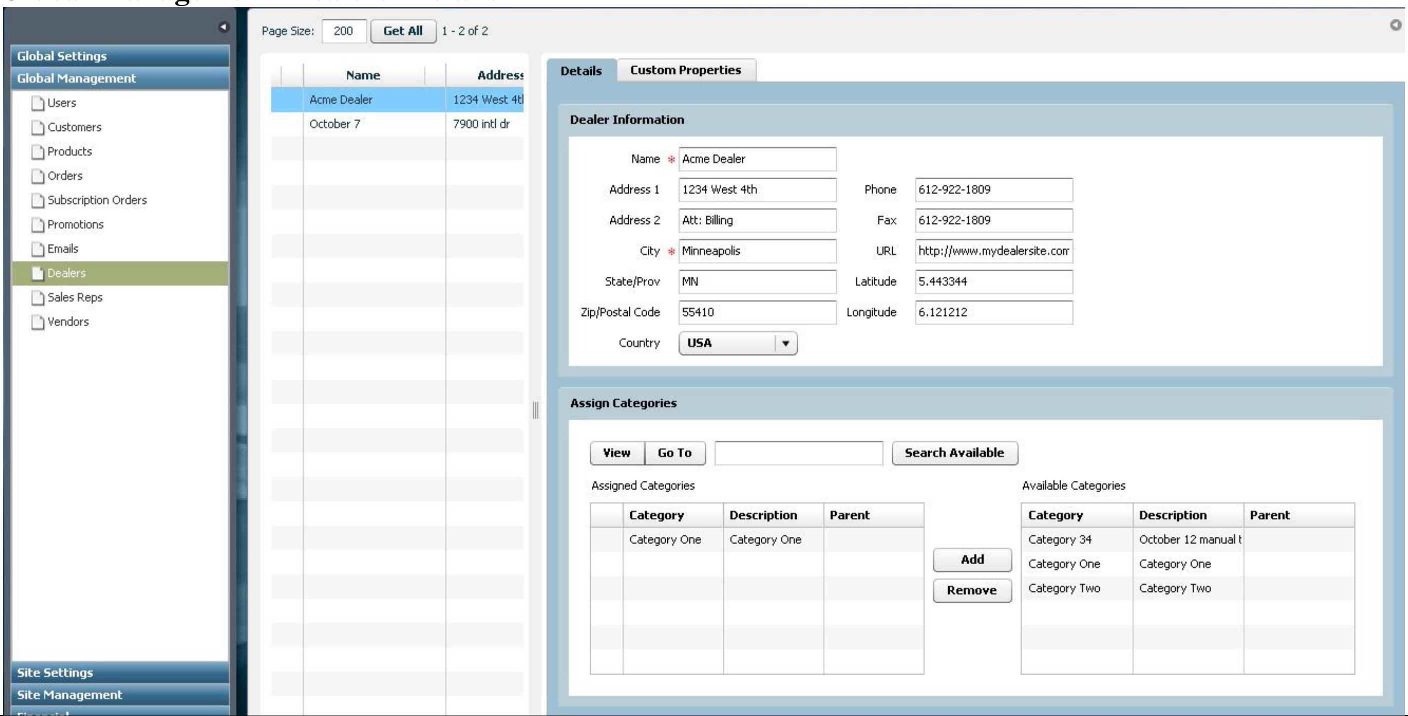


Field Name	Description
View	Will pop-up a quick-view window displaying the User Details for the selected, Assigned User
Go To	Direct navigation away from Emails, to the User record for the selected Assigned User
Search Available	Searches all available Usernames, Emails, First and Last Names. Uses an * 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 Subscribed Users	Generated the HTML formatted email and send it to all subscribers
Export Subscribed Users	Generates an Excel spreadsheet of all subscribed Users that can be imported to a third-party ESP
Add All Users to Subscribed Users	Moves all Users to the Subscribed Users list and associates them to the selected Email

Dealers

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

Global Management>Dealers: Details



Field Name	Description
Dealer Information	
Name	Dealer/reseller name, as it would appear on a site's dealer locator. Required
Address 1	Street address 1
Address 2	Optional street address 2
City	City of Dealer's location. Required
State/Province	State of Dealer's location
Zip/Postal Code	Zip/Postal code of Dealer's location
Country	Country of Dealer's location
Phone	Telephone number for specific Dealer location
Fax	Fax number for the specific Dealer location
URL	Optional website for the Dealer. May be used if dealer locator design includes external links
Latitude	Geographical marker that may be used for a mapped/pinned dealer locator
Longitude	Geographical marker that may be used for a mapped/pinned dealer locator
Assign Categories	
View	Will pop-up a quick-view window displaying the Category Details for the selected, Assigned Category
Go To	Direct navigation away from Dealers, to the Category record for the selected Assigned Category
Search Available	Searches all available Category Names and Descriptions. Uses an * for wildcard searching
Assigned Categories	Categories associated with the particular Dealer

Available Categories	Active Categories that may be assigned to Dealers
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**

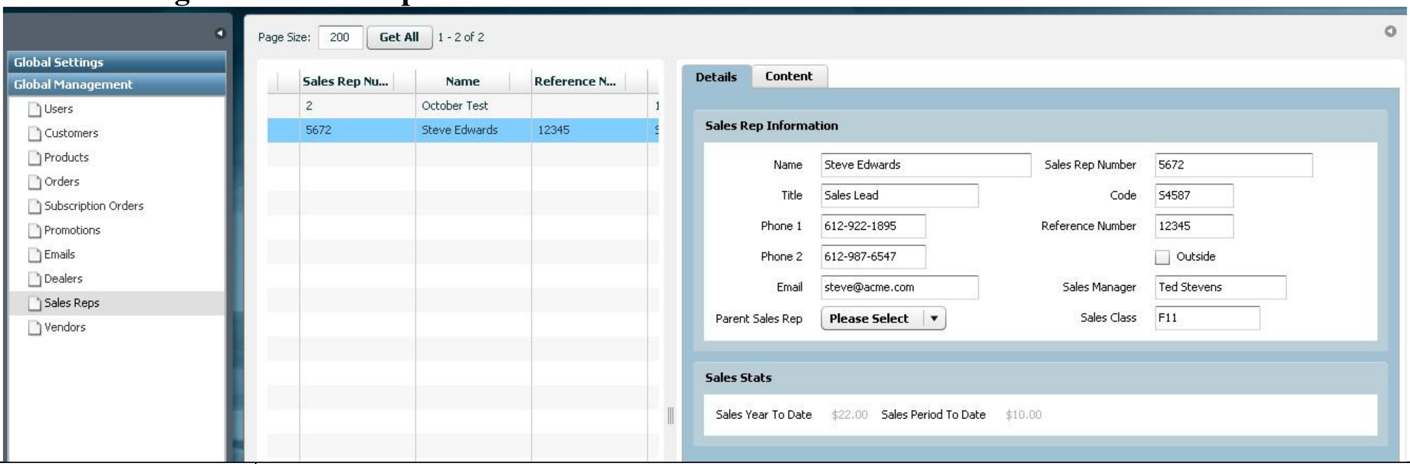
Global Management>Dealers: Customer Properties*

Field Name	Description
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.**

Sales Reps*

Global Management>Sales Reps: Details



Field Name	**Description**
Sales Rep Information	
Name	Sales Rep's complete name
Title	Optional field for Title/Position
Phone 1	Primary telephone number for Sales Rep
Phone 2	Optional additional telephone number
Email	Primary email address
Parent Sales Rep	Sales Principle or Rep 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 Manager	Additional Sales Rep grouping field, if different from Parent Sales Rep
Sales Class	Optional classification field
Sales Stats	
Sales Year To Date	Auto-generated data if Sales Rep Module is fully integrated
Sales Period To Date	Auto-generated data if Sales Rep Module is fully integrated

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

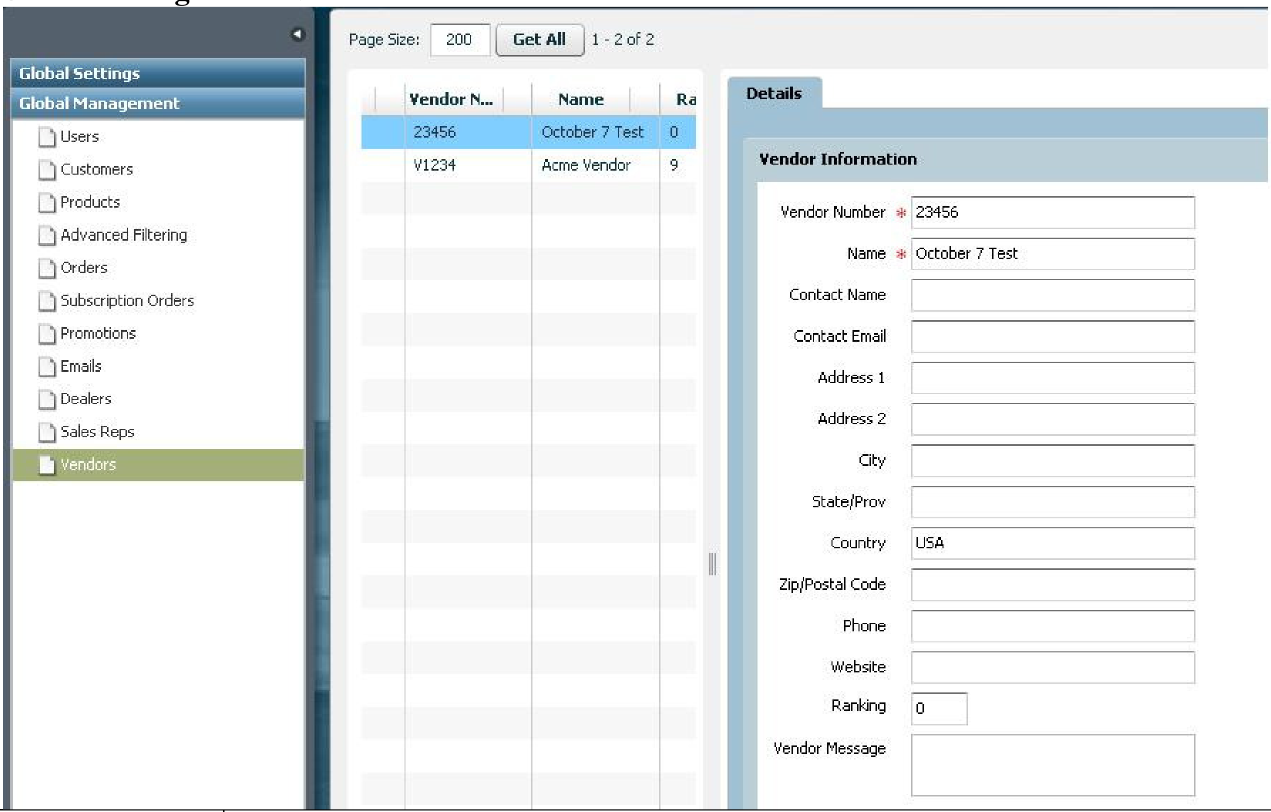
Global Management>Sales Reps: Content

Field Name	Description
Content Details	
Image	Calls out the Sales Rep image
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 Management	
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

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



Field Name	Description
Vendor Number	ERP assigned or manual Vendor reference number
Name	Vendor company name
Contact Name	Primary Contact person at Vendor
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
Zip/Postal Code	Country of Vendor's location
Phone	Primary telephone number at Vendor
Website	Optional URL for Vendor
Ranking	Display rank, if required
Vendor Message*	Field for optional, vendor specific site messaging

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

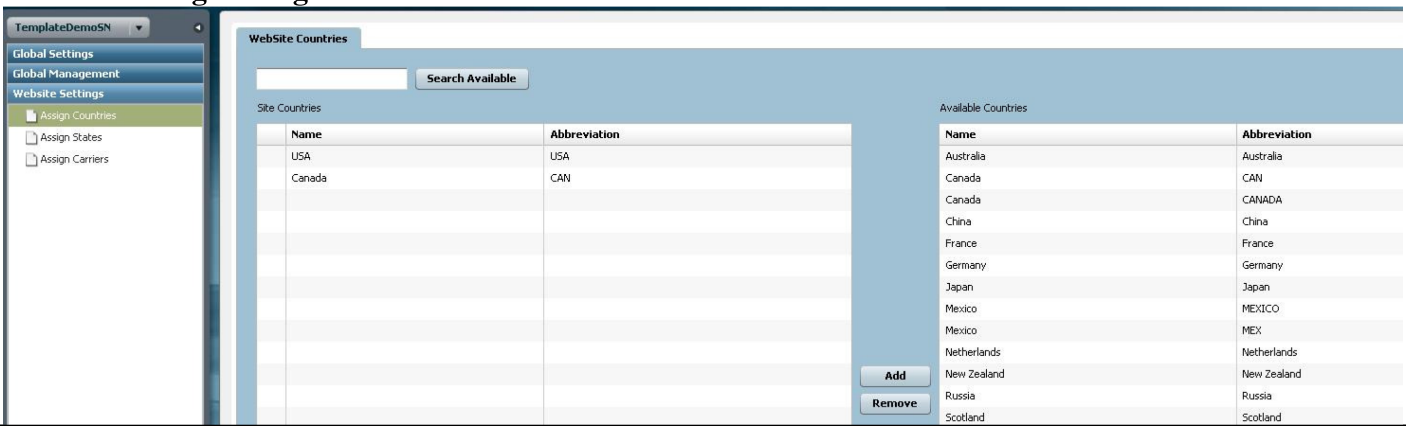
Website Settings

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

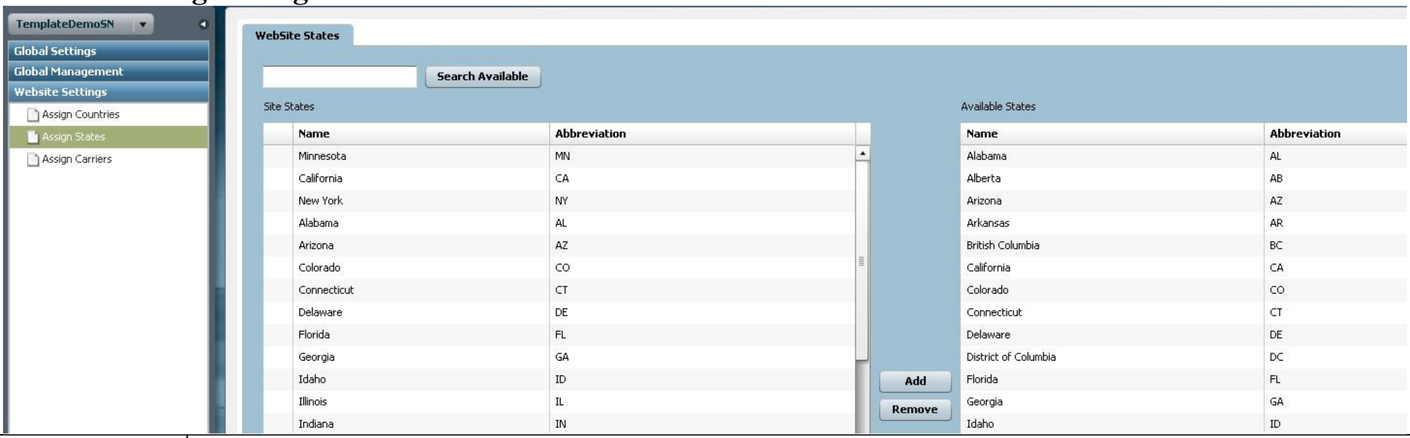
This is where the Countries and States/Provinces set up in Global Settings can be assigned on a site-by-site basis.

Website Settings>Assign Countries



Field Name	**Description**
Search Available	Searches all available Country names and abbreviations. Uses an * for wildcard searching
Site Countries	Countries associated with the particular website
Available Countries	Active Countries that may be assigned to the specific website
Add	Moves one or many Available Countries to the Assigned Countries field and makes the association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many Assigned Countries associations and sends them back to the Available Countries field. Drag-and-Drop may also be used instead of the button

Website Settings>Assign States

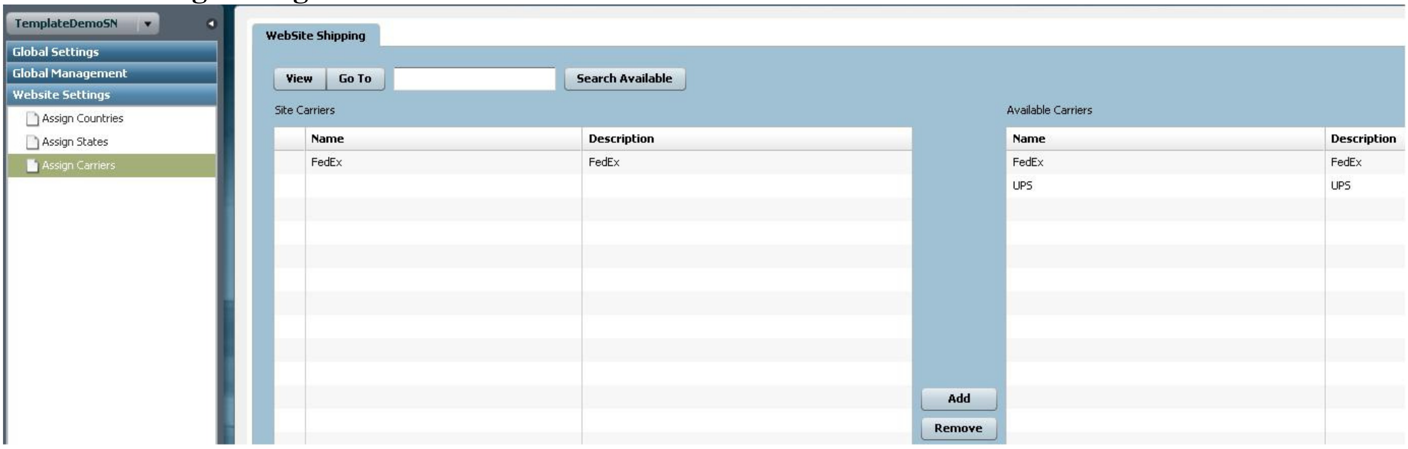


Field Name	**Description**
Search Available	Searches all available State names and abbreviations. Uses an * for wildcard searching
Site States	States associated with the particular website
Available States	Active States that may be assigned to the specific website
Add	Moves one or many Available States to the Assigned States field and makes the association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many Assigned States associations and sends them back to the Available States field. Drag-and-Drop may also be used instead of the button

Assign Carriers

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

Website Settings>Assign Carriers



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 Available	Searches all available Carrier names and descriptions. Uses an * for wildcard searching
Site Carriers	Carrier(s) associated with the particular website
Available Carriers	Active Carriers that may be assigned to the specific website
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

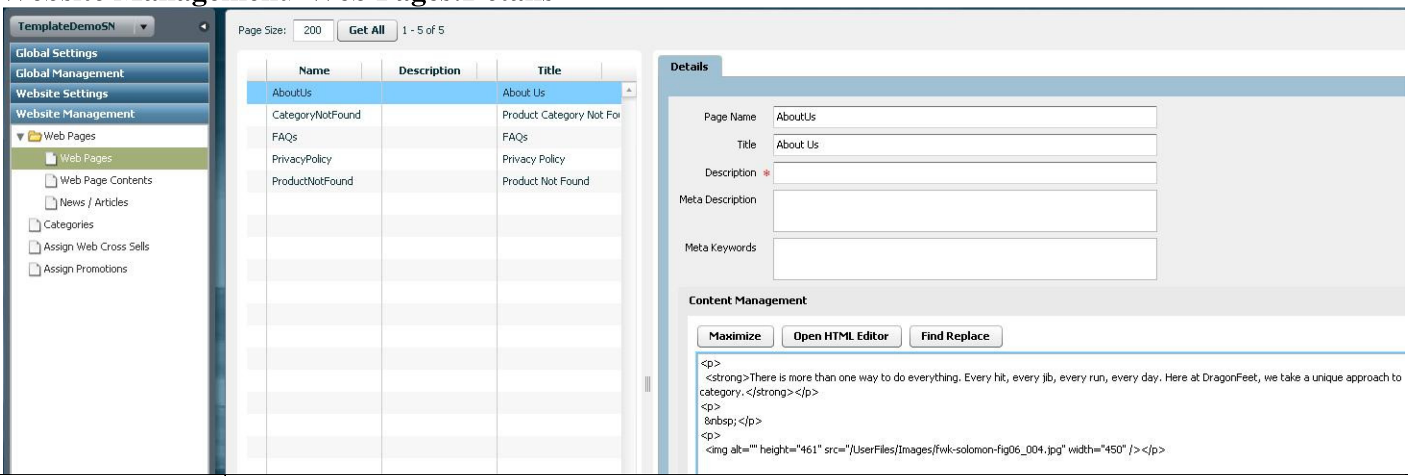
Site Management

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

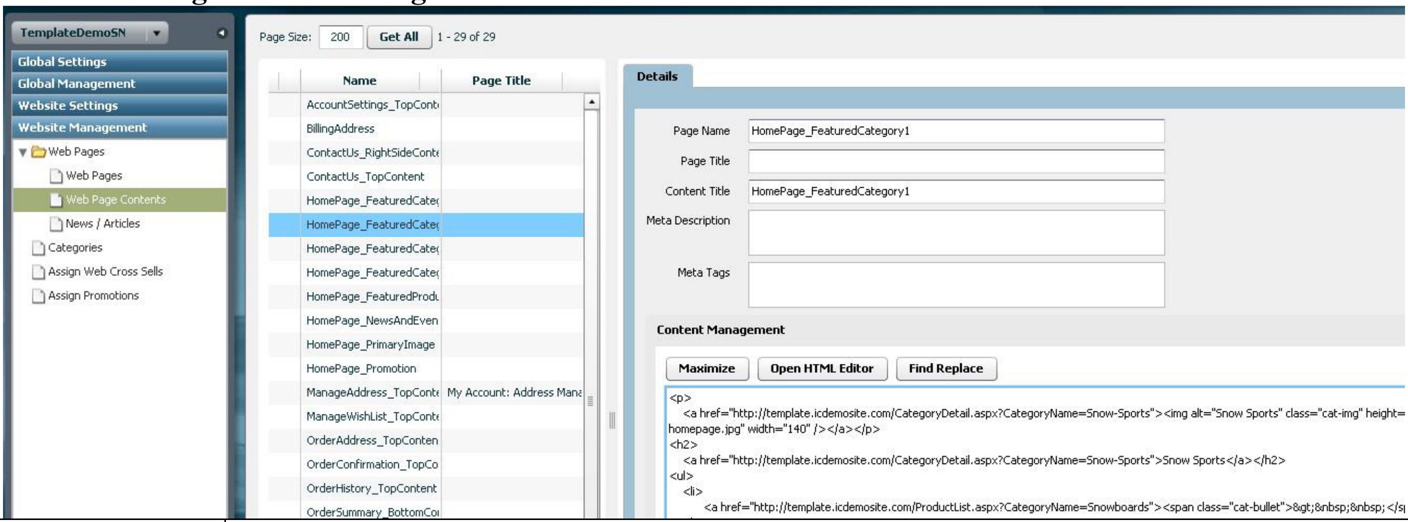
These are the three types of content managed areas that you can maintain via the integrated HTML Editor. **Web Pages** are the fully content-managed, copy-heavy pages of your site, such as About Us and FAQs. **Web Page Contents** are the broken-out sections of other pages that have a mix of dynamic content 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



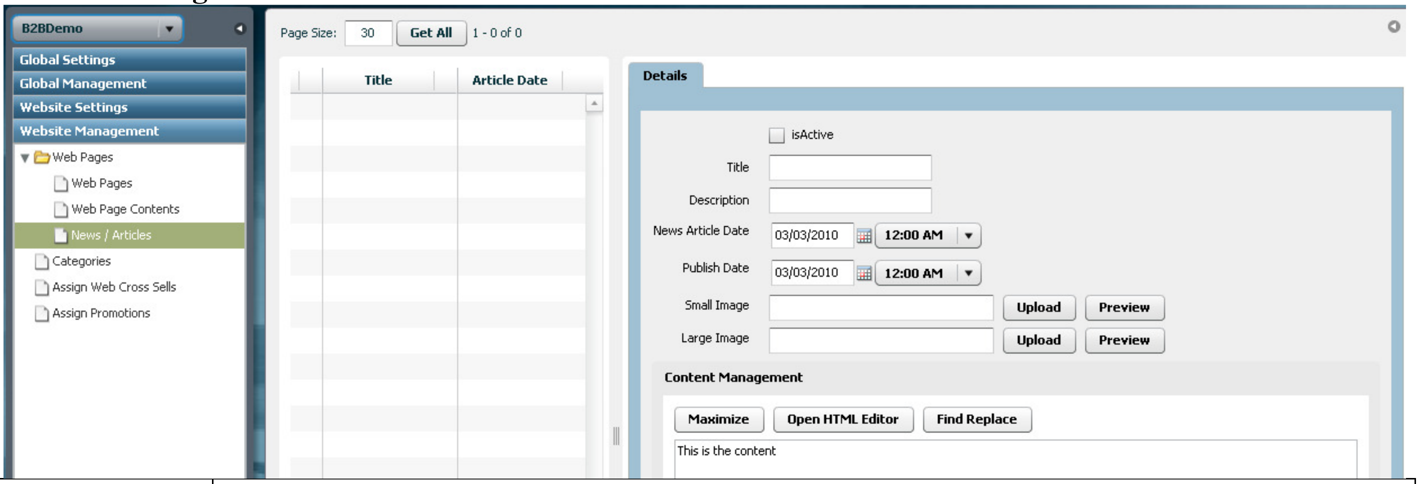
Field Name	Description
Details	
Page Name	Specific page name. May be used on menus
Title	Page title to display at top browser. Displays in the Content Managed navigation as the page title. SEO friendly. Limited to 72 char
Description	General description of web page
Meta Description	Description to display on SRPs. SEO friendly. Limited to 185 char
Meta Keywords	Meta Tags or Keywords for SEO/SEM
Content Management	
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

Website Management>Web Page Contents: Details



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	Description to display on SRPs. SEO friendly. Limited to 185 char
Meta Keywords	Meta Tags or Keywords for SEO/SEM
Content Management	
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

Website Management>News/Articles: Details

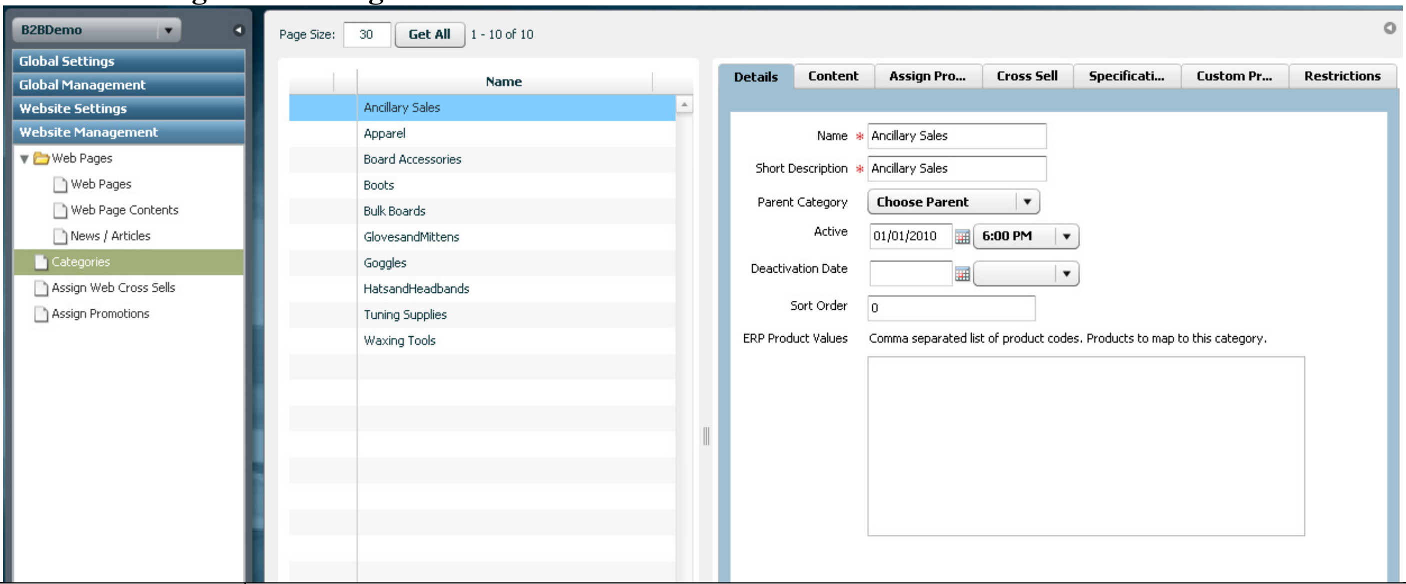


Field Name	**Description**
Is Active	Flags article as active, to be displayed in the specially formatted section
Title	Article or publication title to display on webpage
Description	Short description to display with title
Article Date	Specific date of article. A time may be specified: Defaults to 12:00 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 Path	Calls out the small image of the article. Often a cover shot
Large Image Path	Calls out the large image of the article. Often an image of the full article
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 Management	
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

Categories

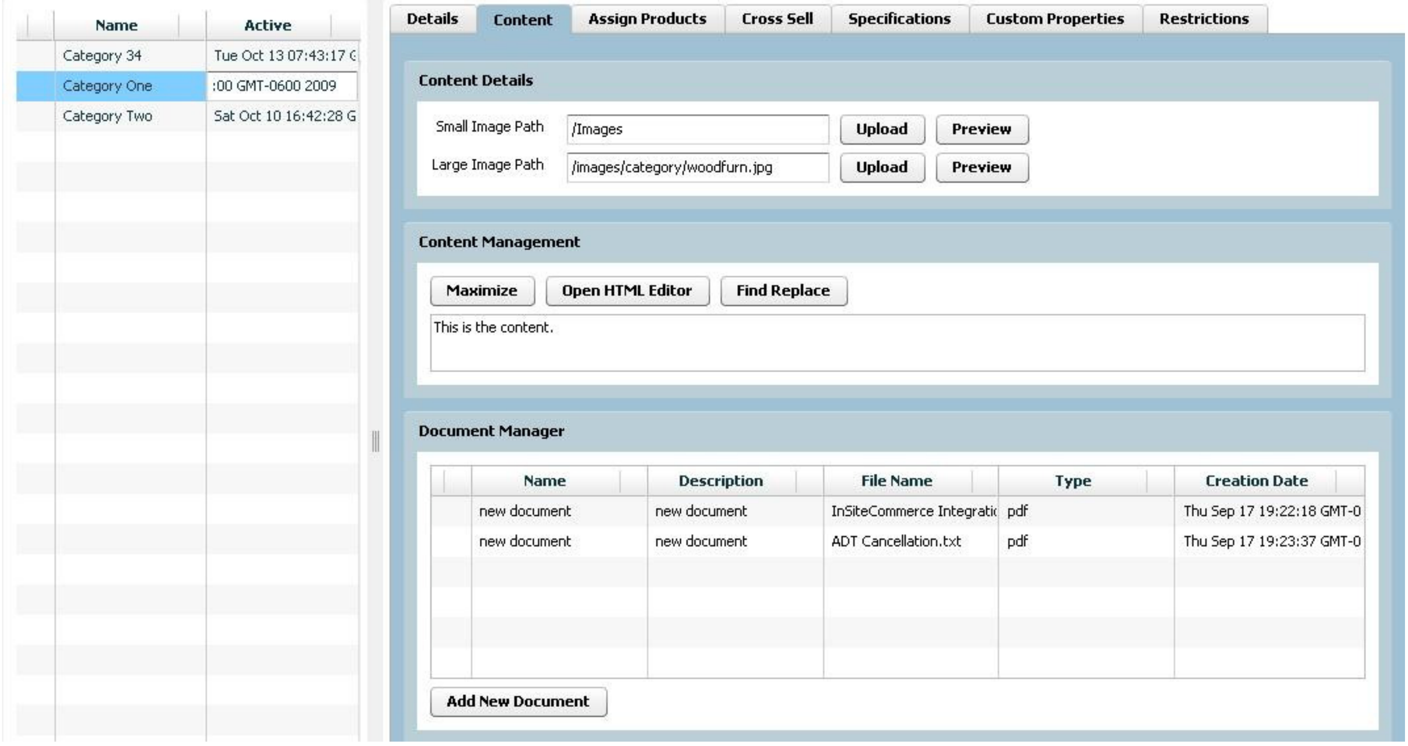
Categories are the product classifications and groupings that drive your website's navigation. While the product catalog is global, categories are site specific. All products are assigned to their respective categories, helping shoppers find exactly what they're looking for.

Website Management>Categories: Details



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 Values	Comma separated list of products assigned to Category. Optional field facilitating imports and/or integrations

Website Management>Categories: Content I



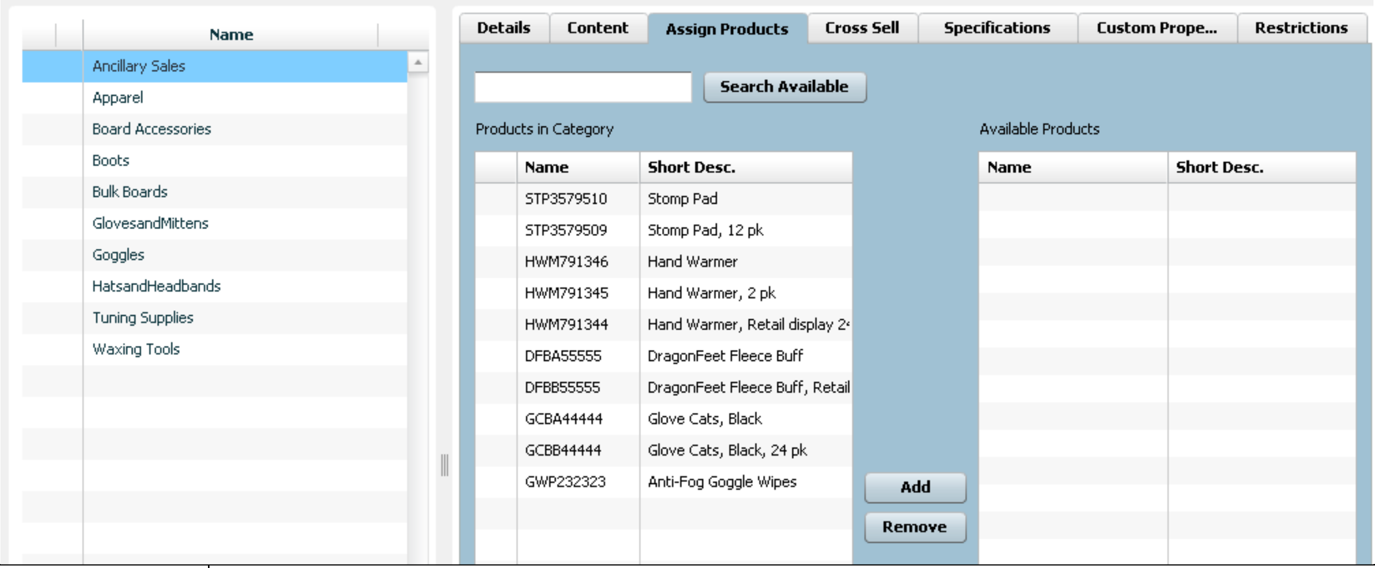
Field Name	**Description**
Content Details Section	
Small Image Path	Calls out the small image of the Category
Large Image Path	Calls out the large image of the Category
Upload	Opens a Windows Explorer session, allowing you to browse for an image and upload it to the web server. Commerce supports the following image types: **.jpg, .gif,.png**
Preview	Opens a pop-up window to preview the associated image
Content Management Section	
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
Document Manager Section	
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
File Name	File name if different from general document name

Creation Date	Date when document was added/upload

Website Management>Categories: Content II

Field Name	**Description**
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

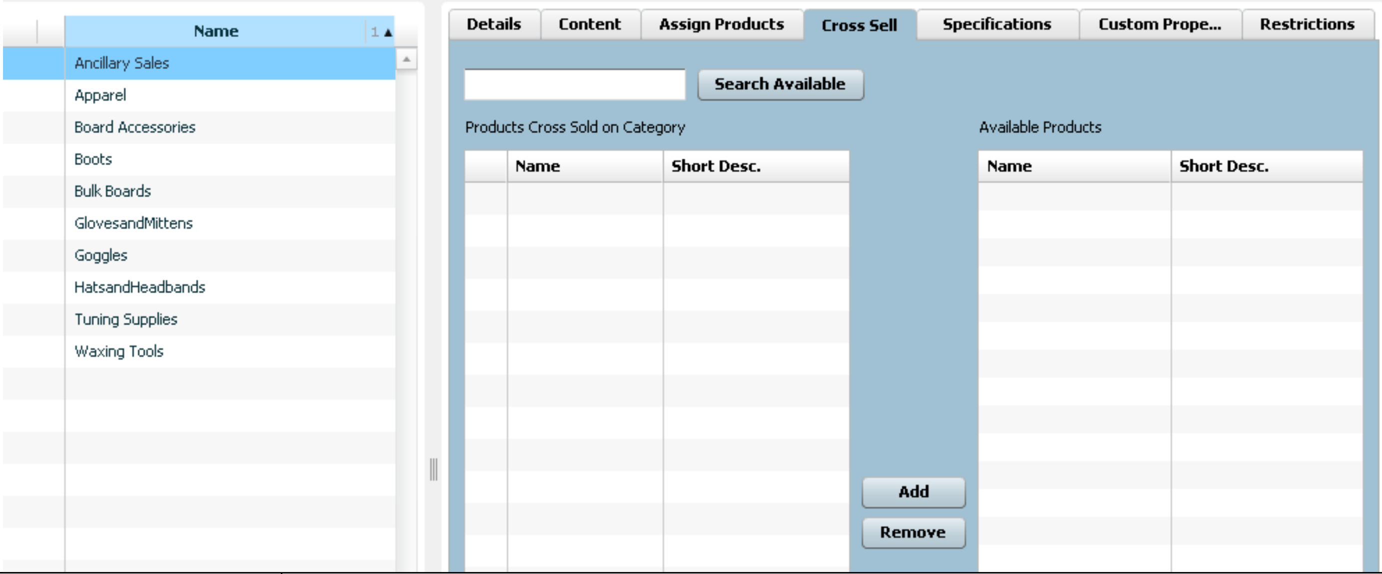
Website Management>Categories: Assign Products



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 Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for wildcard searching
Products in Category	Products associated with the particular Category
Available Products	Search results from Search Available function of Products that may be assigned 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**

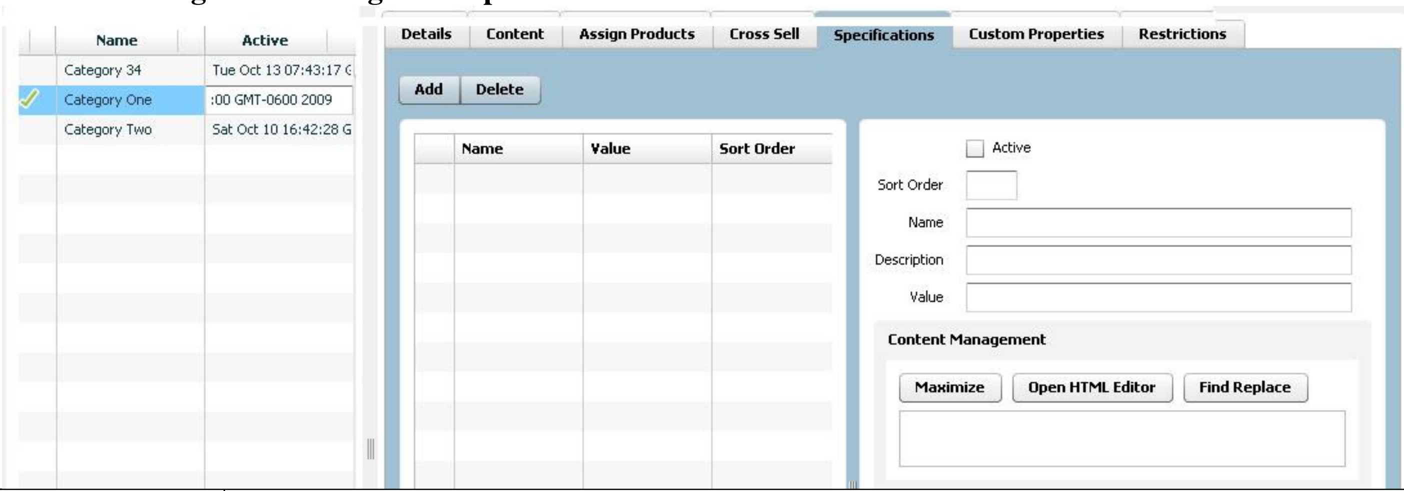
Website Management>Categories: Cross Sell



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 on Category	Products associated with the particular 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

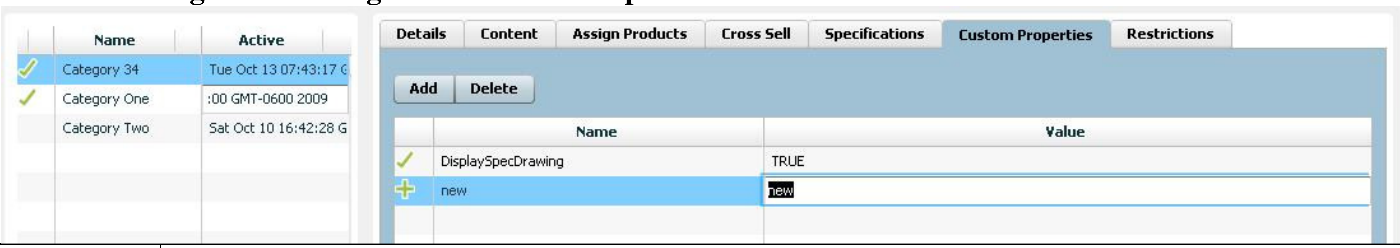
***May require integration customizations**

Website Management>Categories: Specifications



Field Name	**Description**
Add	Creates a new category 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 category
Name	Specification name
Description	General description of specification
Value	Optional field if specification is a simple name:value pair, rather than more detailed content utilizing the Content Manager
Content Management	
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

Website Management>Categories: Custom Properties



Field Name	Description
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

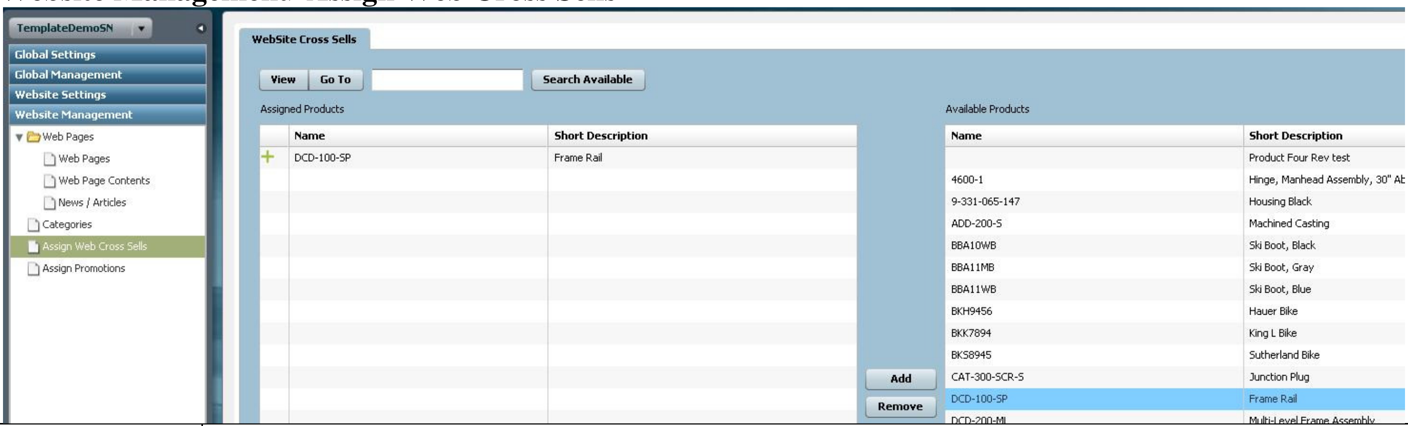
Field Name	Description
Add	Creates a new restriction record on the selected Product
Delete	Flags a selected restriction record for deletion
Name	Name of the particular restriction
State	Dropdown selector for State from which the Product Category is restricted
Is Active	Flags restriction as active, limiting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

*** May require customizations.**

Web Cross Sells

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.

Website Management>Assign Web Cross Sells



Field Name	Description
View	Will pop-up a quick-view window displaying the Product Details for the selected, Cross Sold Product
Go To	Direct navigation away from selected Category, to the Product record for the selected Cross Sell
Search Available	Searches all available Product Names, ERP Numbers and Short Descriptions. Uses an * for wildcard searching
Assigned Products	Cross Sold Products that display on the selected Category detail page
Available Products	Active Products that may be assigned as Cross 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

Assign Promotions

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

Website Management>Assign Promotions

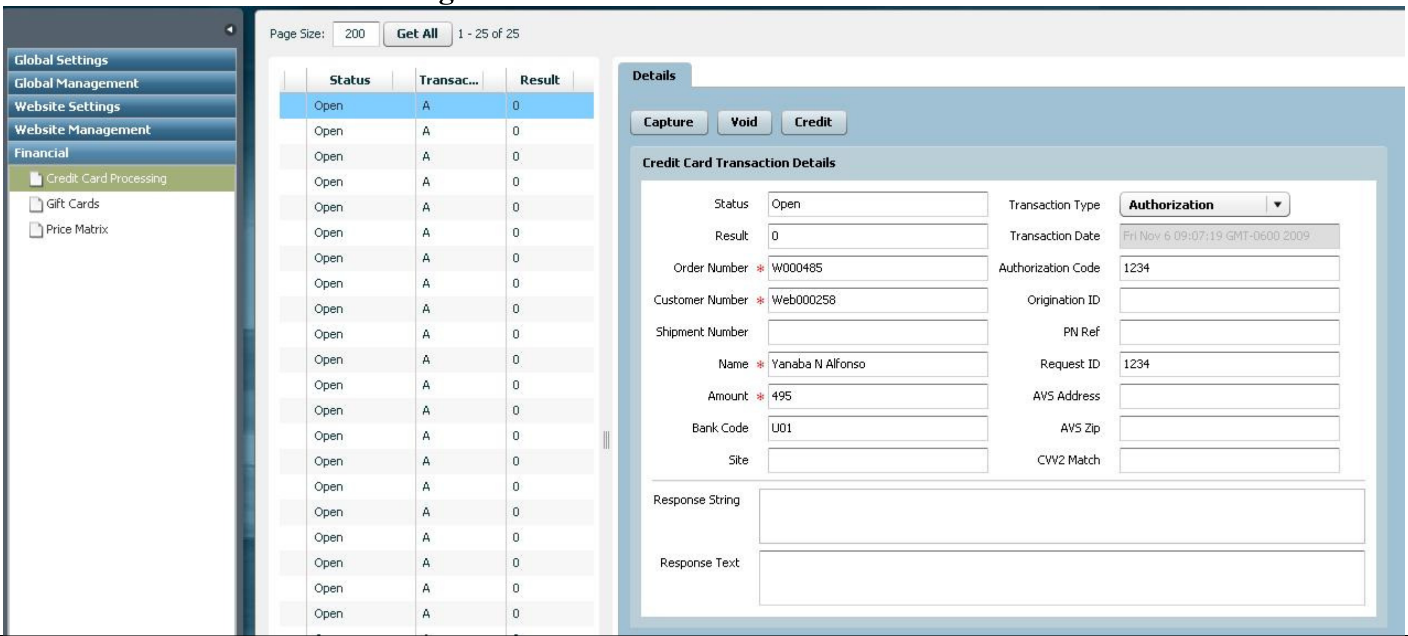
Field Name	Description
View	Will pop-up a quick-view window displaying the Promotion Details for the selected, Assigned Promotion
Go To	Direct navigation away from selected Category, to the Promotion record for the selected Assigned Promotion
Search Available	Searches all available Promotion names and Active and Deactivation dates. Uses an * for wildcard searching
Assigned Promotions	Promotions that are active on the selected website
Available Promotions	Active Promotions that may be attached to the specified website
Add	Moves one or many Promotions to the Assigned Promotions field and makes the association. Drag-and-Drop may also be used instead of the button
Remove	Removes one or many Promotions associations and sends them back to the Available Promotions field. Drag-and-Drop may also be used instead of the button

Financial

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



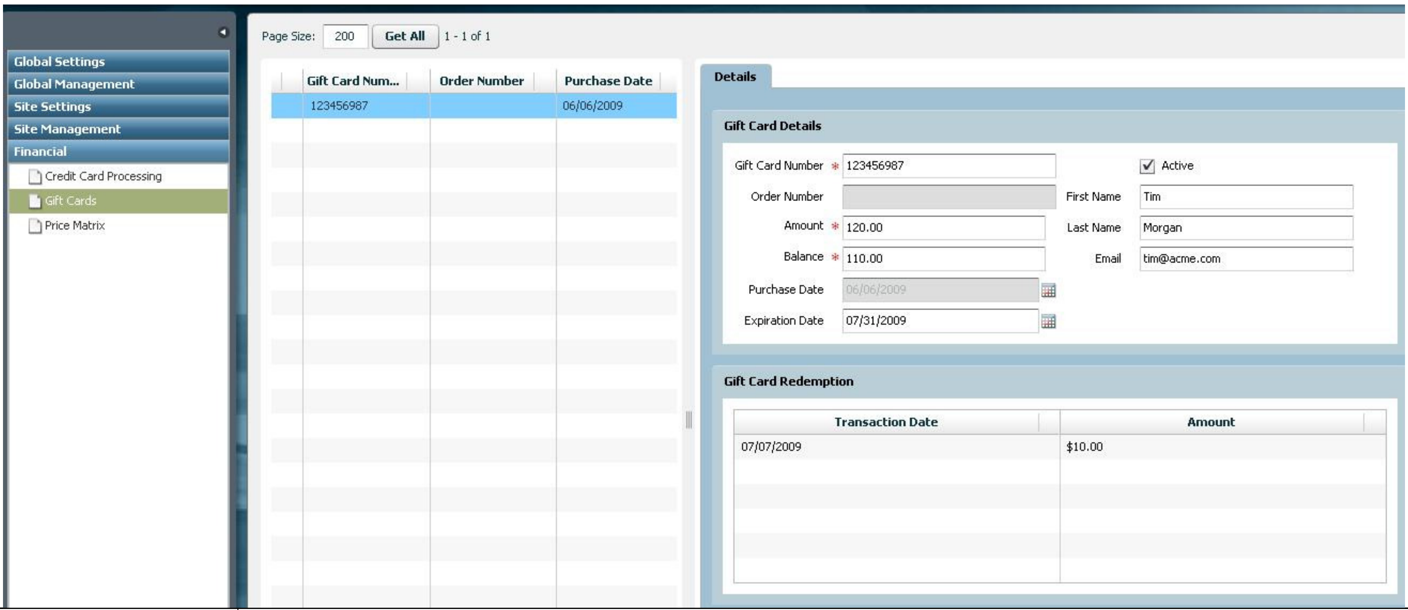
Field Name	Description
Capture	Issues a delayed capture. Button will not appear if not applicable
Void	Issues a void. Button will not appear if not applicable
Credit	Issues a credit. Button will not appear if not applicable
Status	Transaction status
Result	Payment gateway specific transaction result code
Order Number	Order which transaction applies to. May be auto-filled via navigation from Global Management>Orders
Customer Number	Customer which transaction applies to. May be auto-filled via navigation from Global Management>Orders
Shipment Number	Optional shipment record field
Name	Cardholder name as entered at checkout
Amount	Transaction dollar amount
Bank Code	Optional bank code tracking field
Site	Optional field for multi-site implementations
Transaction Type	Dropdown for selecting applicable transaction type
Transaction Date	Date of each transaction
Authorization Code	Payment Gateway specific authorization code
Origination ID	Payment Gateway specific origination code
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

Gift Cards*

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

Financial>Gift Cards

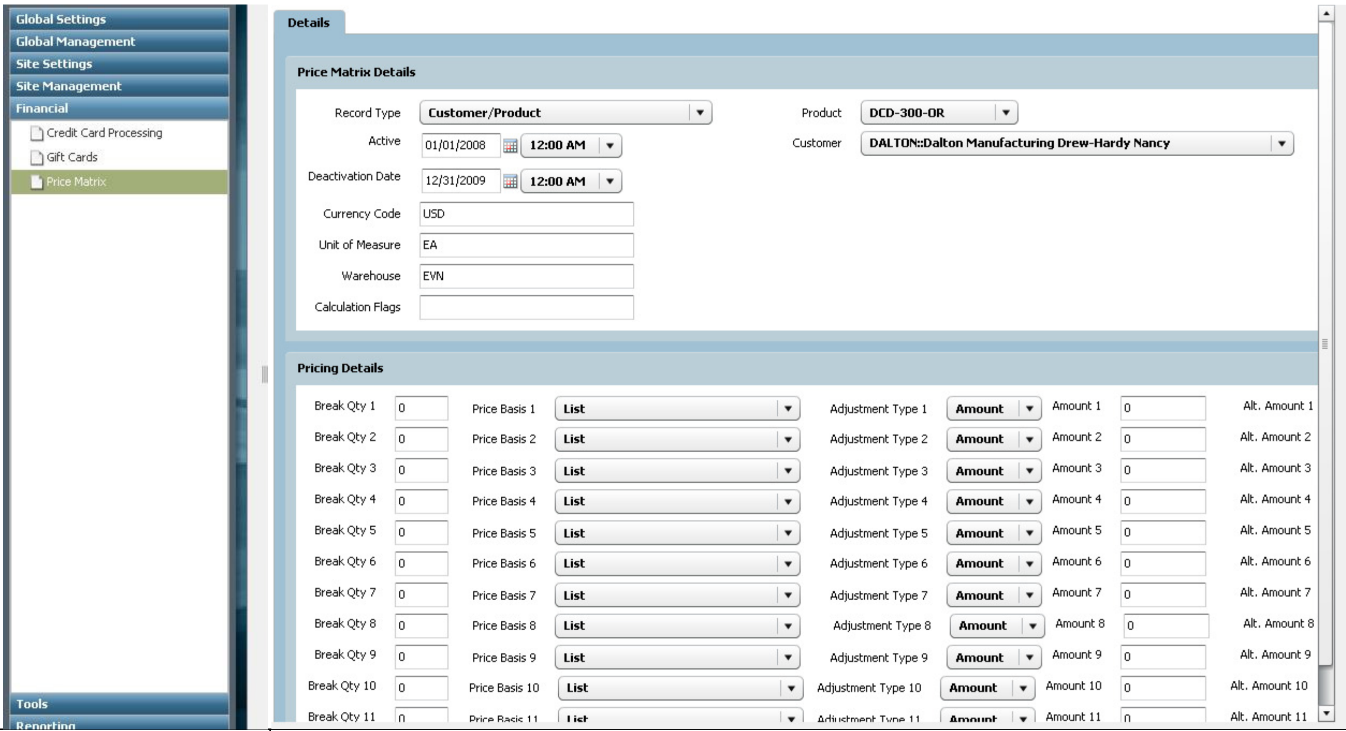


Field Name	**Description**
Gift Card Details	
Gift Card Number	Unique card/certificate ID
Order Number	Number of order on which Gift Card was purchased
Amount	Original amount of Gift Card
Balance	Current, automatically calculated balance, subtracting all redemptions from the original amount
Purchase 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 Redemption Table	
Transaction Date	Date when any or all of the value of the Gift card is used as a payment method against an order
Amount	Dollar value redeemed on the selected transaction date

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

Price Matrix

Financial>Price Matrix: Details



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 Category	Product grouping option
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 – 11	Flags the specified price adjustment as either Amount or Percentage based
Amount 1 – 11	Dollar amount or Percentage to use for the specified adjustment calculation
Alt. Amount 1 - 11	Alternate Adjustment Amount field if needed for customizations*

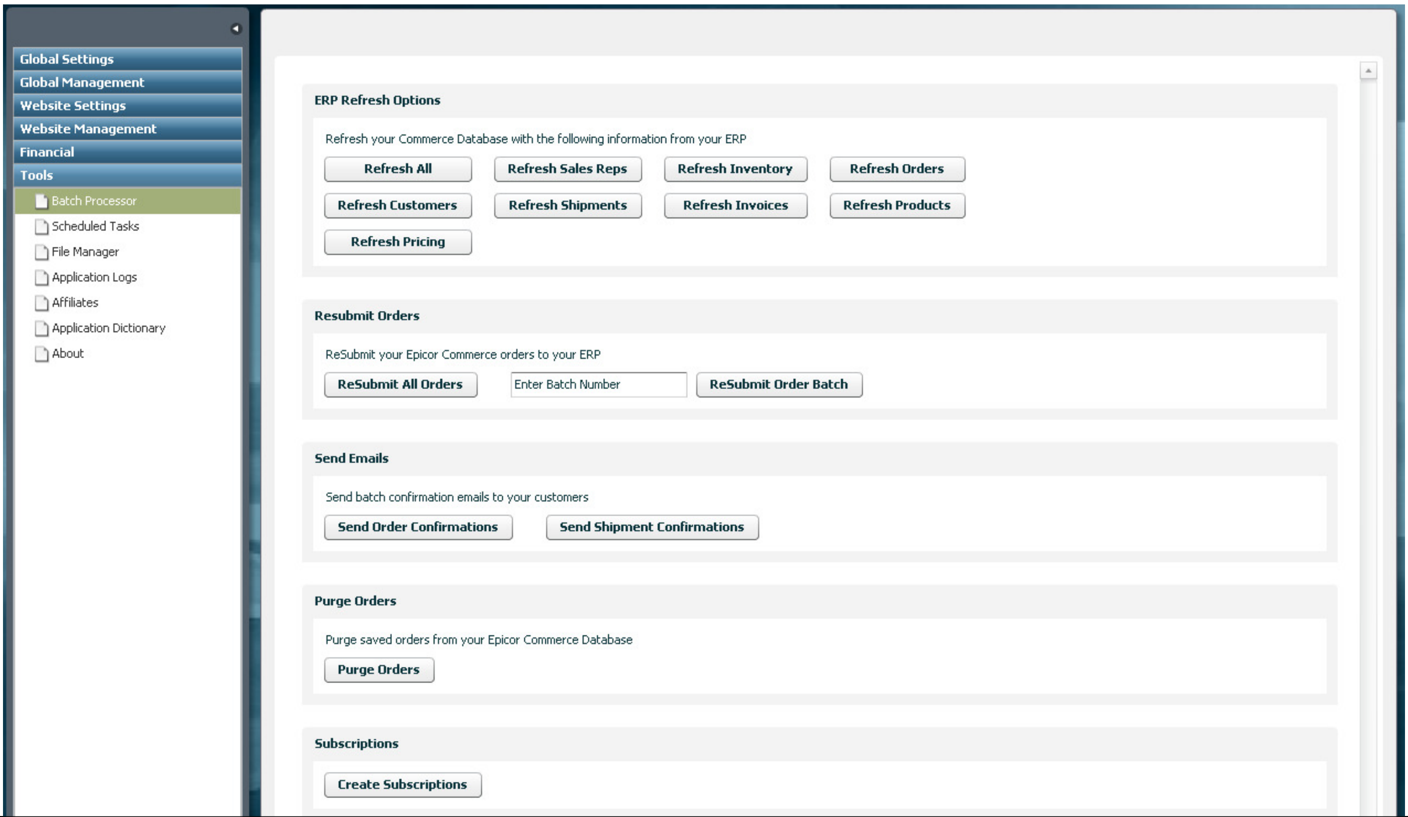
***Some constructs may require advanced Integration services**

Tools

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



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

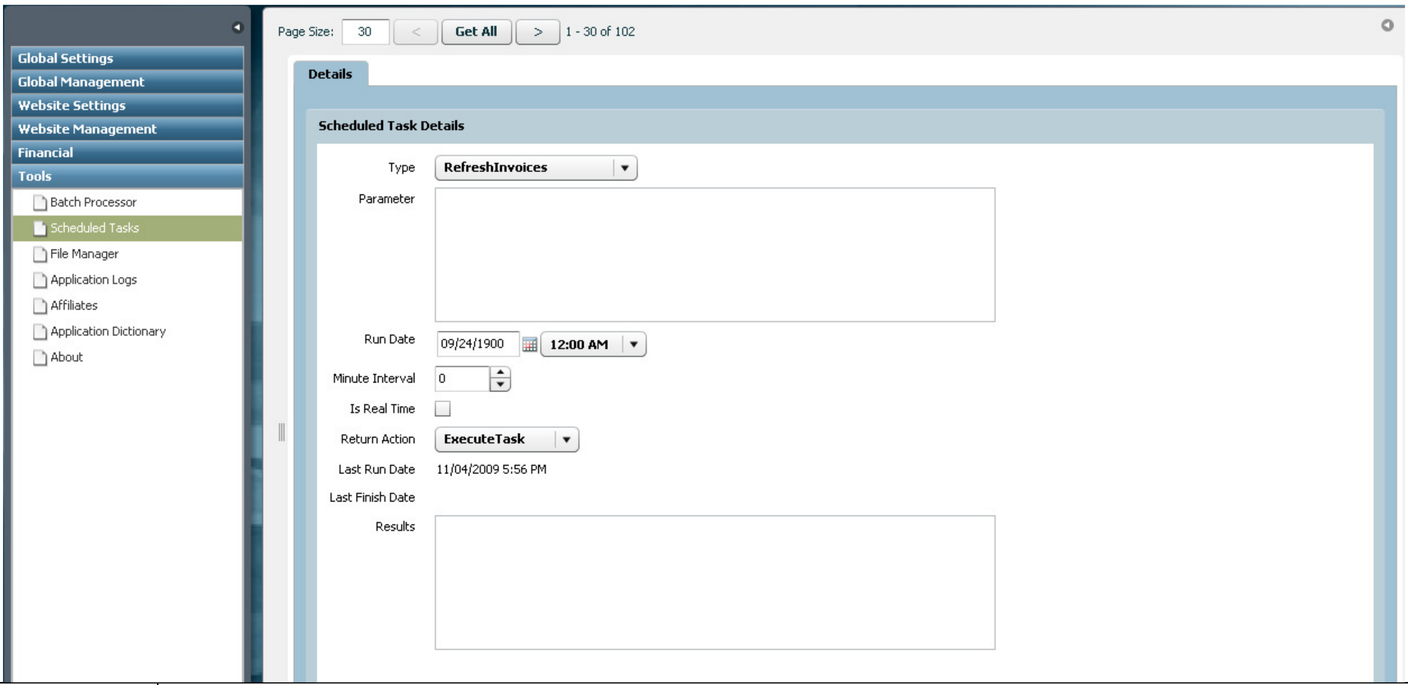
	them to the ERP. May be used as a back-up during ERP outages
Resubmit Order Batch	Resubmits a select group of orders. Batch numbers may be found on the Order Detail record
Send Emails	
Send Order Confirmations	Manually sends a batch of Order Confirmation emails (as maintained in Global Management>Emails) to all submitted orders that have not yet received them
Send Shipment Confirmations*	Manually sends a batch of Shipment Confirmation emails (as maintained in Global 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

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



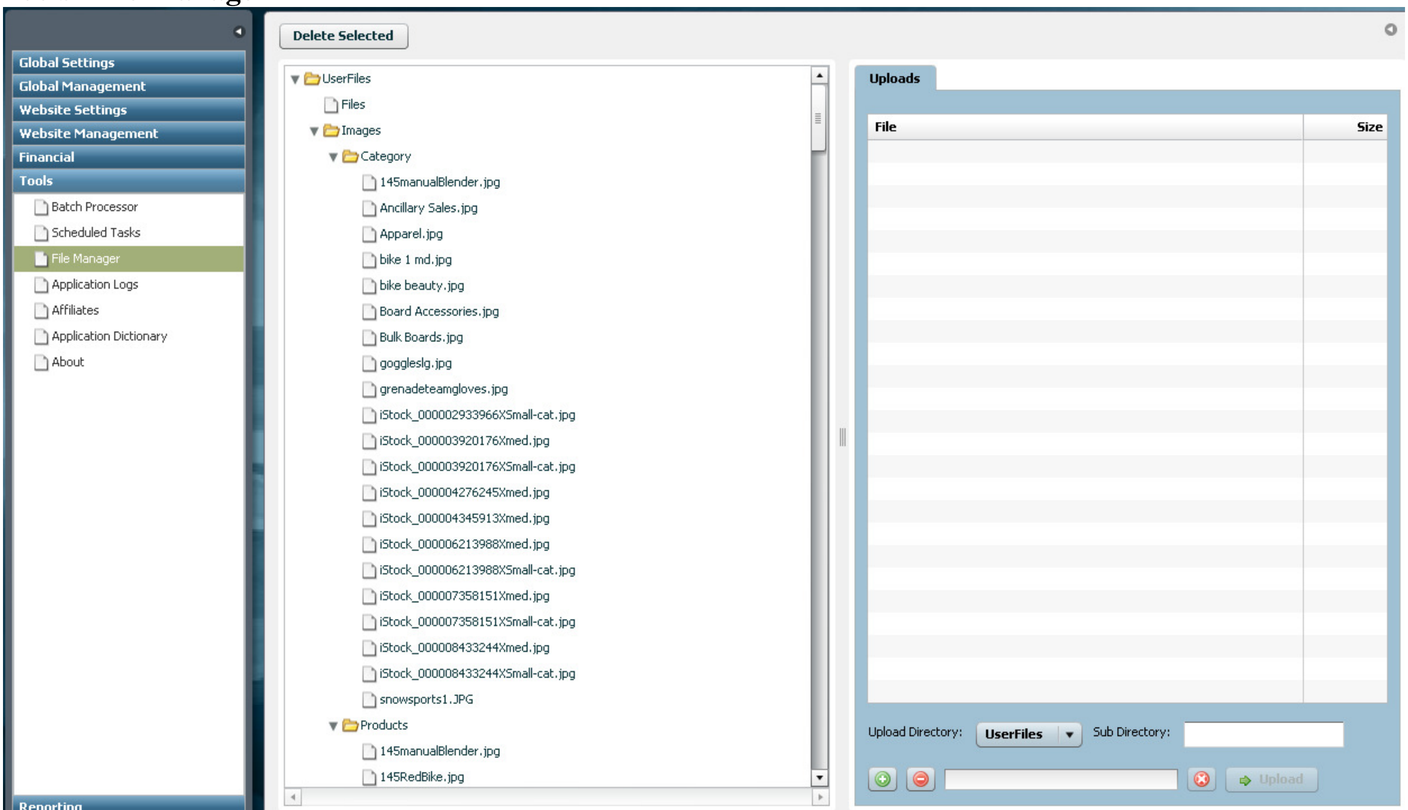
Field Name	**Description**
Type*	Task type selector. Options include: RefreshCustomers, RefreshPricing, RefreshCustomerOrders, RefreshProducts, RefreshInvoices,RefreshSalesmen, RefreshShipments,RefreshResellers, RefreshDealers, RefreshInventory, SubmitOrders,ResubmitOrders, ExecuteQuery, RetryOrderSubmit, SystemPause
Parameter	Optional parameters if needed to execute the task
Run Date	Date (and time) task may be scheduled to run, for date-driven functions
Minute Interval	Timing, in minutes, of how frequently the task is scheduled to run
Is Real Time	If flagged, shows that implementation of the select task/query is to run real-time
Return Action	The intended result of the selected task: ExecuteTask or ReturnDataSet
Last Run Date	The last date and time the selected task began running
Last Finish Date	The last date and time the selected task was completed
Results	Optional results of task, such as a returned data set from a query

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

File Manager

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

Tools>File Manager



Field Name	Description
Uploaded Files List	
Delete Selected	Will delete a highlighted file from the web server
UserFiles Directory	Master directory for all uploads
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**
Images Subdirectory	Folder for storing image files such as: **.jpg, .gif, .png**
Category Sub-subdirectory	Sub-folder for organizing Category files. May exist under all standard Subdirectories
Content Sub-subdirectory	Sub-folder for organizing Content Managed Page files. May exist under all standard Subdirectories
Products Sub-subdirectory	Sub-folder for organizing Product files. May exist under all standard Subdirectories
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

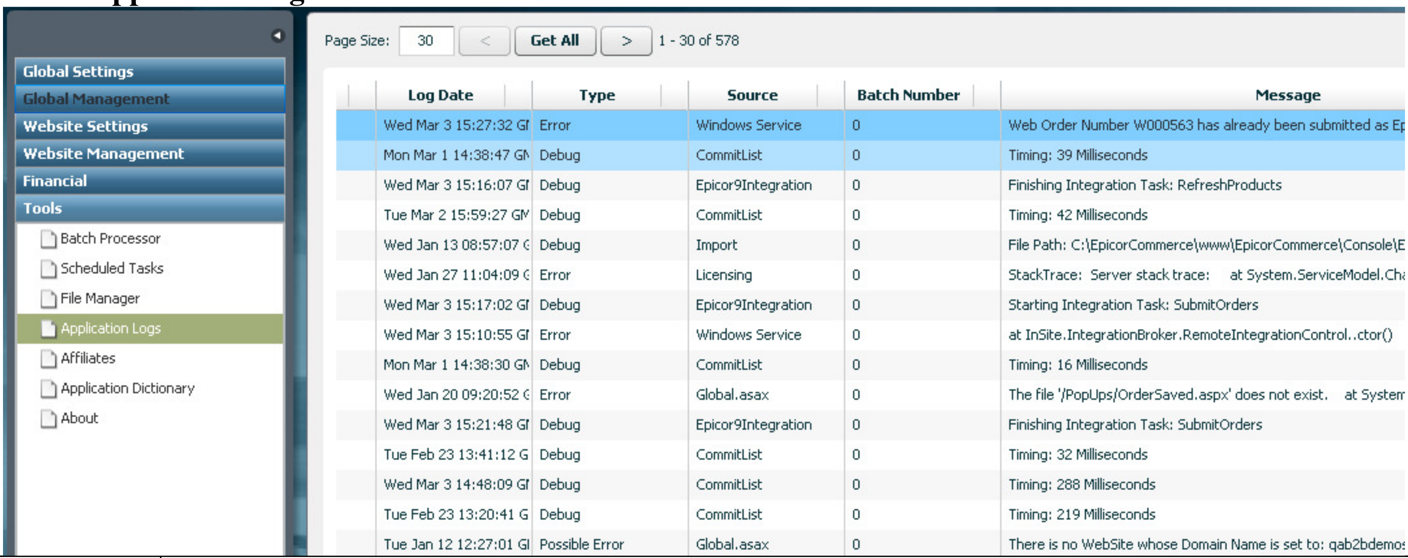
Upload Directory	All uploads must be to the UserFiles Directory. Additional subdirectories may be added as necessary
Subdirectory	All uploads are routed to one of three main Subdirectories: Files, Flash or Images. Additional sub-subdirectories may be created as necessary
Add File(s)	Opens a Windows Explorer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

sitecore

Application Logs

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

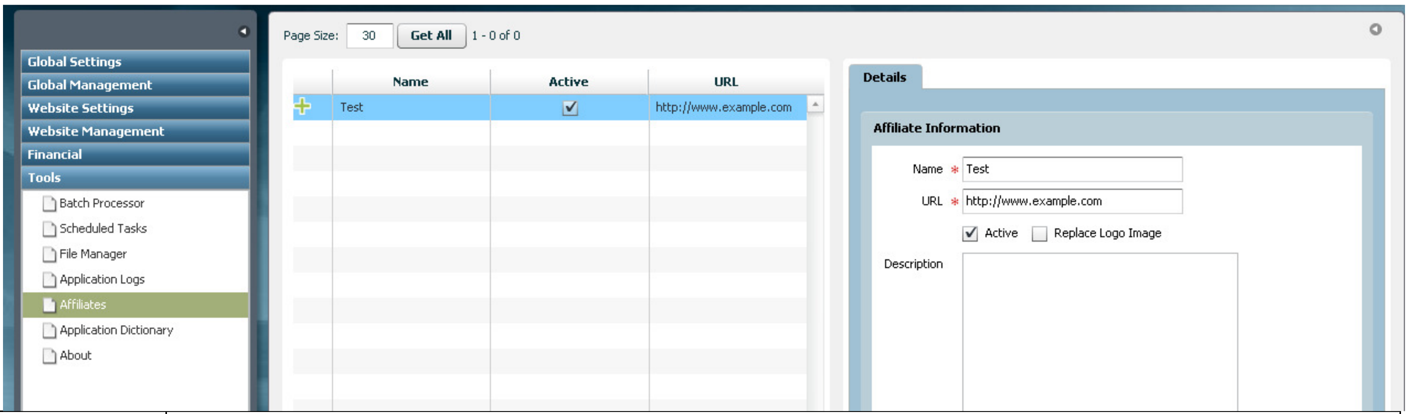


Field Name	Description
Log Date	Date and time of error or logged event
Type	Log types include: Error, Debug and Info
Source	Module or process that generated the message
Batch Number	Batch of logged event
Message	System generated error-specific message

Affiliates*

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

Tools>Affiliates



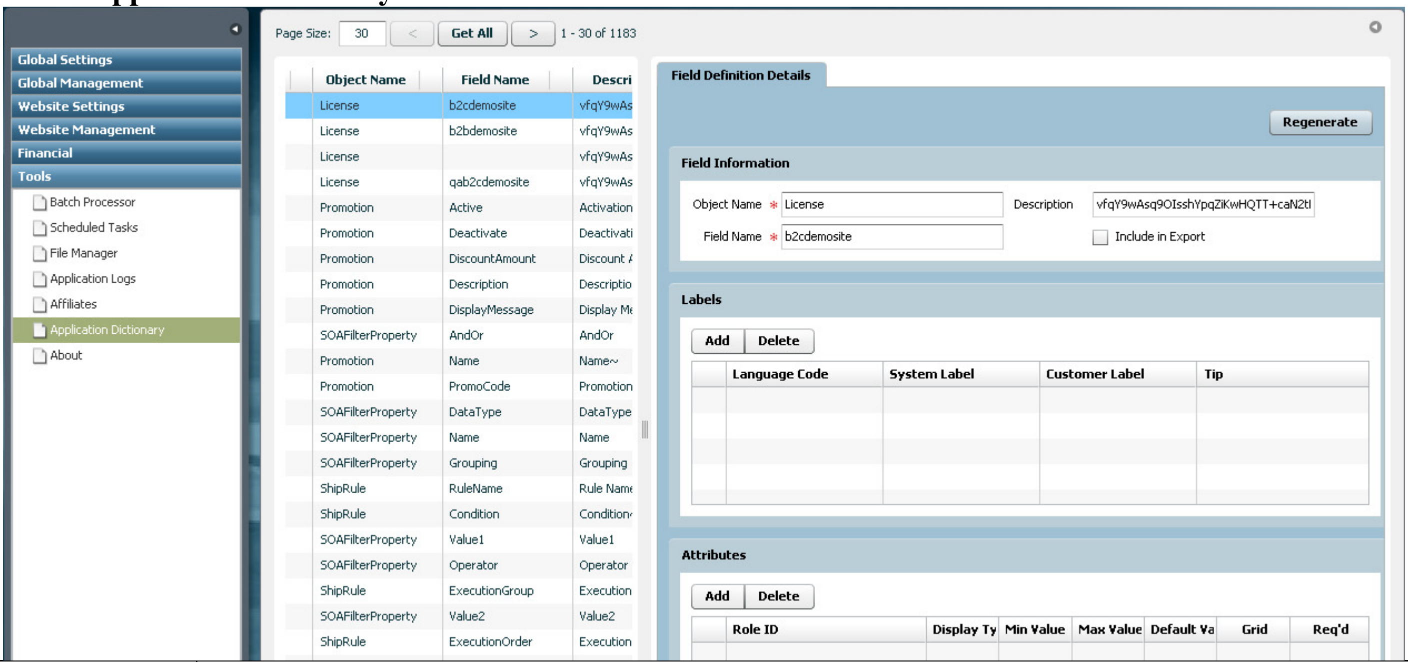
Field Name	Description
Name	Name of affiliate marketing partner
URL	Website of Affiliate company
Active	Flags Affiliate as an active marketing partner
Description	Optional description/comment field

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

Application Dictionary

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



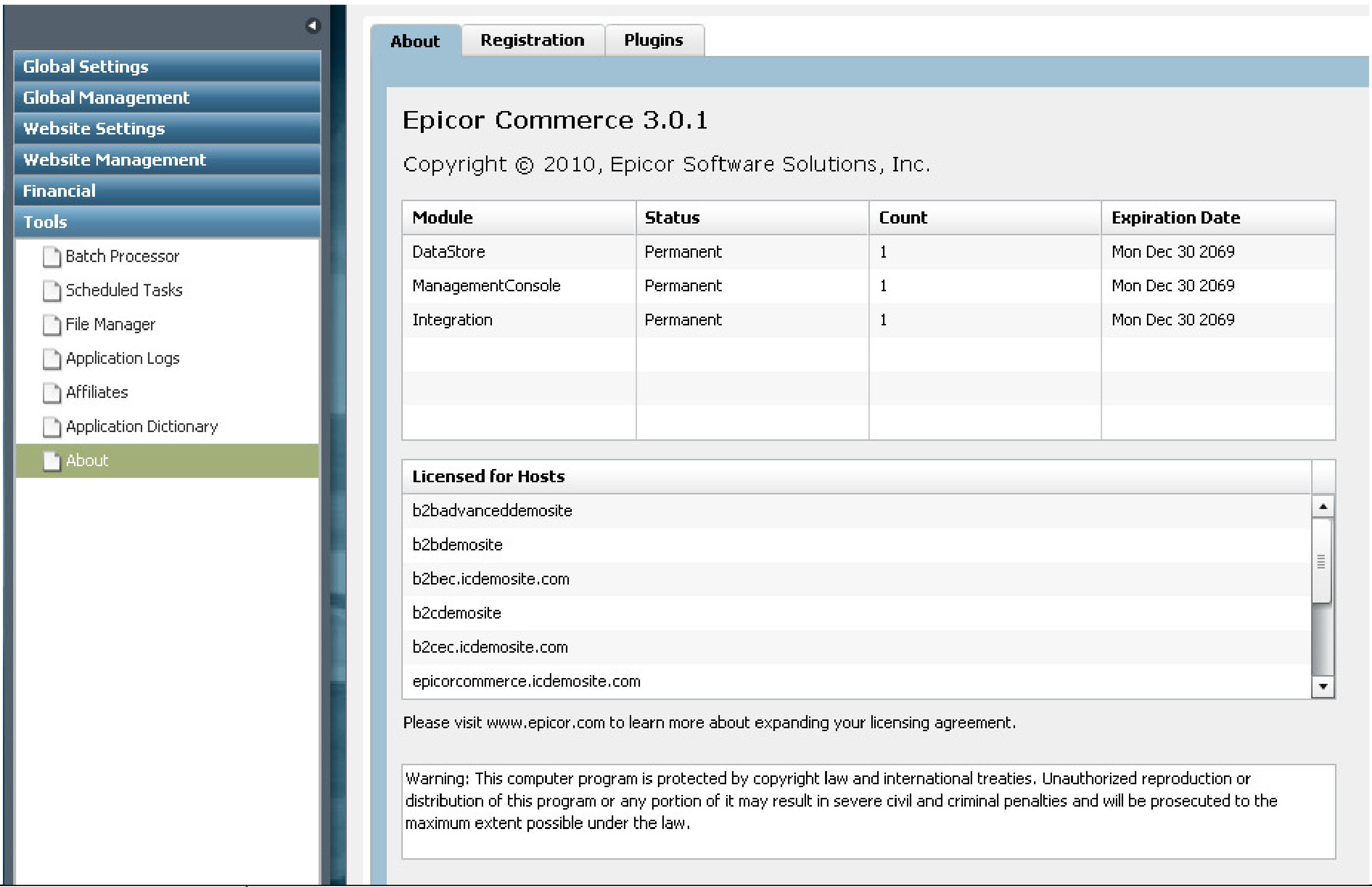
Field Name	Description
Field Information	
Regenerate	Reviews the entire Commerce application for Object and Field additions/edits, in order to create new Application Dictionary records
Object Name	Parent construct of the associated data element. May be a table, field, button or function. Objects are 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 Export	Flags field as an element to include in the contextual export
Labels	
Add	Creates a new label record
Delete	Flags a label record for deletion
Language Code	ISO standard code used to identify the language of specified field labels in the Management Console. Required
System Label	Management Console default label. Required
Customer Label	Optional, implementation specific label. Used to synchronize naming conventions between a 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

About

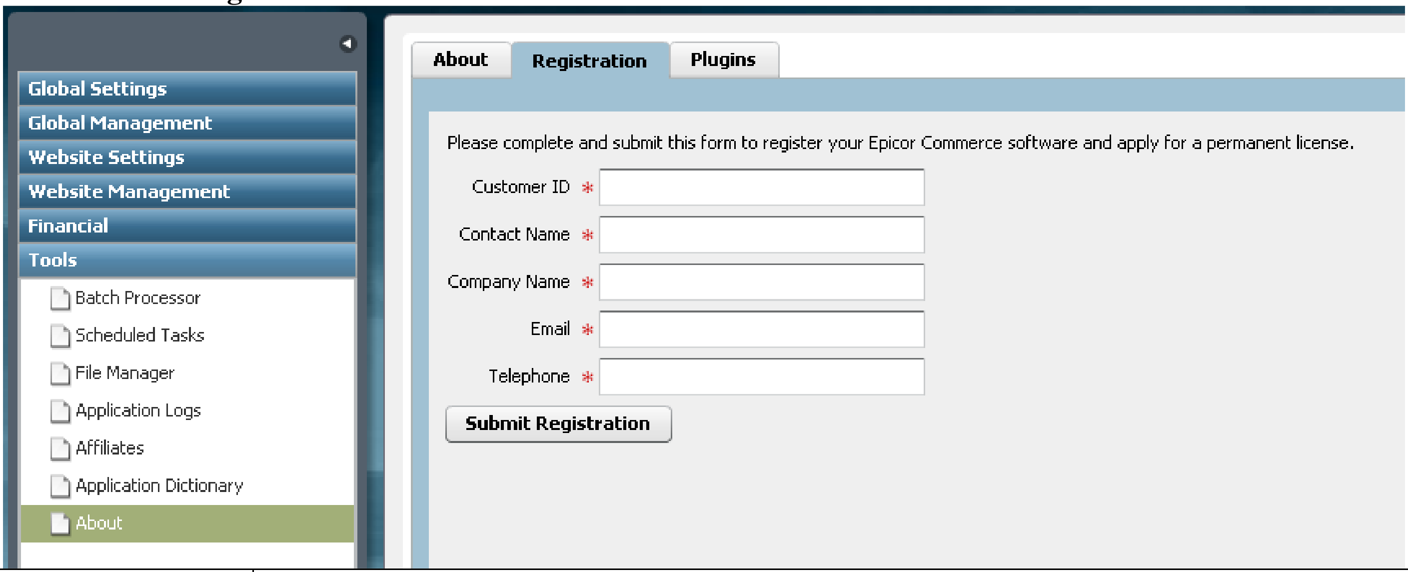
The about section contains company-specific licensing and module details. When logging in to the Management Console for the first time, users will be directed to the About:Registration area to complete their application registration.

Tools>About



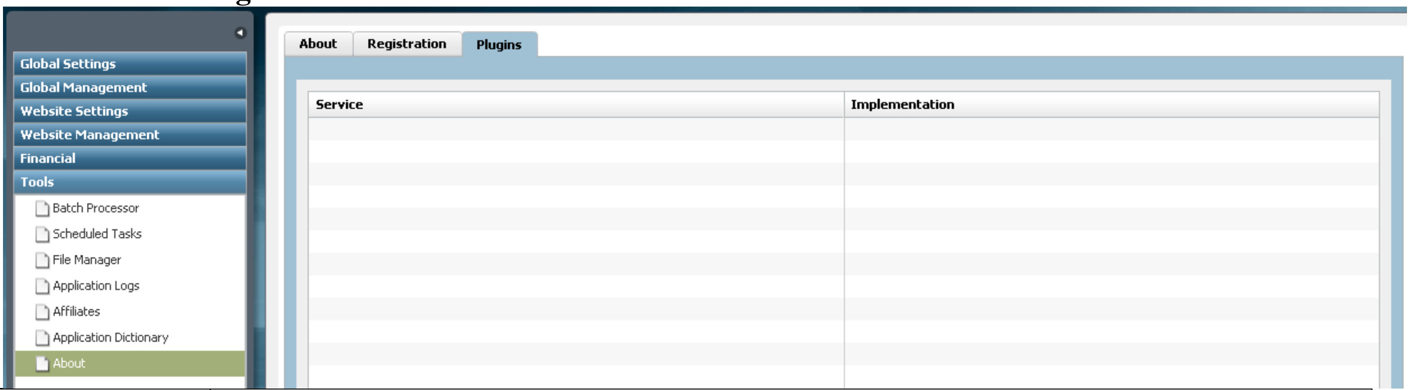
Field Name	**Description**
Application Version	Commerce application version ID and company to which it is licensed
Module	Module name such as Management Console, Integration Service, etc.
Status	License type: Pending, Permanent, Provisional
Count	Number of units of each module
Expiration Date	Date when license expires
Licensed for Hosts	List of all URLs associated with the licensing

Tools>About: Registration



Field Name	Description
Customer ID	ID as provided by InSite or Partner
Contact Name	Primary contact for license
Company Name	Name of company associated with the ID provided
Email	Primary contact email address
Telephone	Primary contact telephone number
Submit Registration	Sends registration request to Insite Software

Tools>About: Plug-Ins



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**

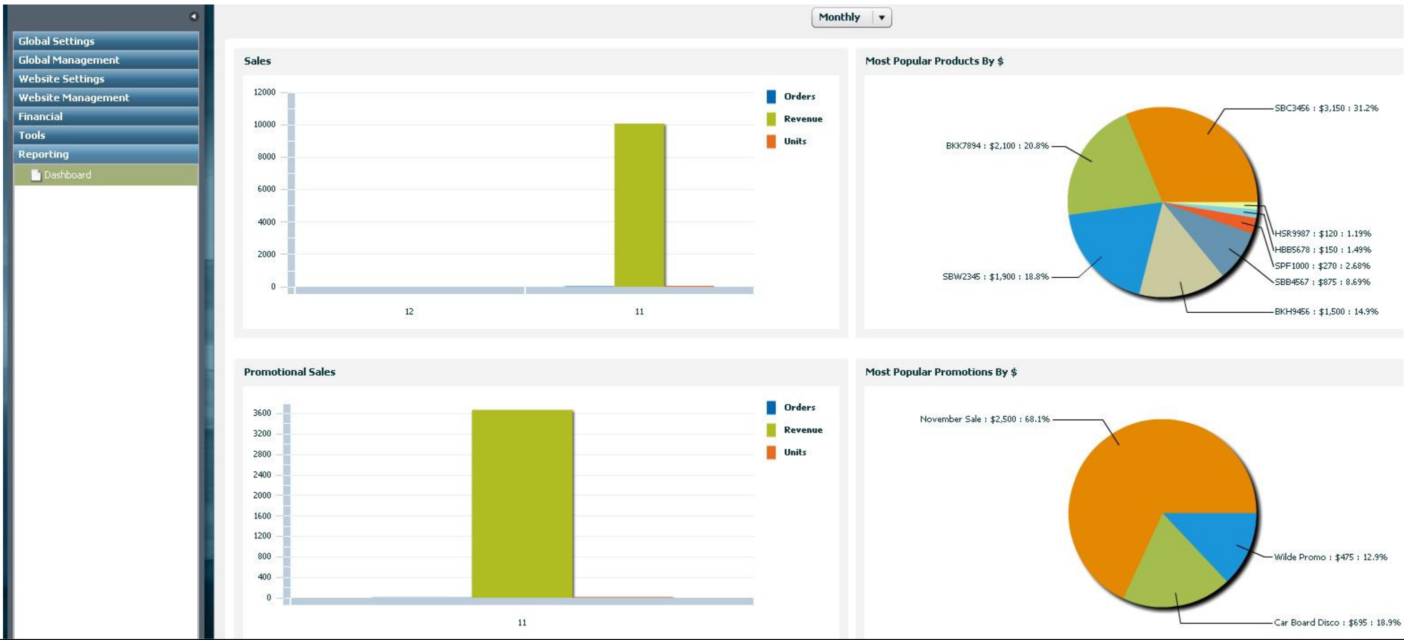
Tools>About: Registration

Field 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

Reporting

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 Graph	Promotional sales by Orders, Revenue and Unit count
Product Popularity Pie Chart	Product popularity by dollar value
Promotion Popularity Pie Chart	Promotion popularity by dollar value