ACTIVANT®

Eclipse Web Commerce Set Up

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Legal Notices

Activant® Eclipse™ 8.6.2 Online Help System

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Table Of Contents

Web Commerce Setup Overview

Web Commerce is an electronic storefront that makes it easy for your customers to do business with your company over the Internet. Customers can place orders 24 hours a day, 7 days a week — without salespeople. Customers can also take advantage of up-to-the-moment price and product information, plus account information.

Using the Web Commerce companion product (formerly known as Web Order Entry or WOE), your customers can access your Eclipse system through your web site. Access is protected using secure logins, passwords, and authorizations.

Your customers use a *shopping cart* interface to place orders. Your store front can also include product images and links to manufacturers' web sites. Shoppers using Web Commerce level 2 sites can also customize the site, for example changing the display options.

Web Commerce includes numerous features for ordering products:

- Reorder Pad – For repeat purchases.
- Quickpad – For orders of familiar products.
- Product categories and subcategories – For browsing.
- Product groups – For creating custom groups of favorite products.
- Searching – For finding products using just a partial description.

Web Commerce also includes built-in advertising features. Increase revenue by selling and tracking banner ads, or increase web site traffic by exchanging links with your trading partners. View the comprehensive site statistics to analyze your web site traffic and orders. For more information, see Banner Advertising Overview and Viewing Web Commerce Statistics.

Use With Other Companion Products

You can extend the power of Web Commerce by using it with other companion products. Web Commerce is fully integrated with Eclipse and the following products:

- Credit Card Authorization – Accept and automatically authorize credit card sales from your web customers.
- Outbound E-Mail Commerce – Automatically send customers e-mails acknowledging orders.
- Product Data Warehouse (PDW) – Include product images and technical information from your PDW. Customers can also make product comparisons.
- Document Imaging – Store and display product images, without using PDW.

Documentation

The web commerce documentation is provided in two parts:

- Web Commerce – The document you are now reading, which details how to set up and administer your web site.
- Using Web Commerce – Explains how customers use your Web Commerce site. Using Web Commerce is written for both you and your customers, and describes how to use the web site to place an order.

See Also:

Setup Requirements for Web Commerce

Setup Requirements for Web Commerce

The following sections list setup requirements for web transactions.

Control Maintenance Records

Set up the control maintenance records for the Web Commerce application, as well as the other companion products you are using with it. For a categorized list of these records, see Control Maintenance Records for Web Commerce.

Authorization Keys

Assign the following authorization keys:

- PRODUCT.CAT.MAINT
- WOE.MAINT

Set Up the Application on Your System

- Create a link on your web site to the Authorization page, where your customers log in, using the following address:

  www.yourcompany.com\eserv\eclipse.ecl?FORMNAME=FX&TRACKNO=0

- Authorize users responsible for using and maintaining product categories using the PRODUCT.CAT.MAINT authorization key.

Set Up the Web Commerce Page

- Add your company logo to the web site.
- Provide web ship via descriptions.
- Add a forgotten password link.
- Require a purchase order or release number when placing web orders.
- Enable real-time credit card authorization.
- Send an e-mail acknowledging each web order. (Outbound E-mail required.)

Set Up Web Commerce Product Information

- Create your company's product categories, assigning product families and price lines.
- Create images.
- Store product category images.
- (Optional) Customize product categories for individual customers.
- Set up a product for catalog or nonstock item requests..

Enable Customers and Contacts

In addition to setting global parameters using control maintenance records, set parameters specific to customers and contacts for web ordering:

- Enable customers for web ordering and set customer-specific web commerce parameters.
- Enable contacts for web ordering and set contact-specific web commerce parameters.
- Authorize personnel to enter web orders.
- Enable anonymous logins.

Set Up Advertising

Advertising setup is optional and only applicable to level 2 sites:

- Create the specials banner.
- Create and store intro, full, and half banner ads.

Set Up Links to Product and Price Information

- Enter links to other web sites using Product Maintenance or using Price Line Maintenance.

Enable the Reorder Pad Feature

- Set the Phantom scheduler to run the Generate Customer Product by Demand Index program on a regular basis to keep the Reorder Pad up to date.

Customize Web Pages (Optional)

- Edit web pages to include custom features specific to your company.
- Provide different web site views for your customers.

See Also:

Web Commerce Setup Overview

Control Maintenance Records for Web Commerce

Following are the control maintenance records used for Web Commerce.

Web Commerce Customer Account Settings

Use the following records to control customer account settings:

- Allow Creation Of New Ship-To Accounts In WOE
- Allow Customer To View Product Groups of Related Customers In WOE
- Allow Editing Of Existing Ship-To Accounts in WOE
- Check Product Availability On Remote Orders
- Hide Account Inquiry And Order History Buttons In WOE
- Hide Account Inquiry Button In WOE
- Hide Order History In WOE
- Hide Bill-To/Other Ship-To Bids On Ship-To Inquiry In WOE
- Default Document Storage Location ID for WOE Signatures
- New WOE Customer Template
- Prevent WOE Customers From Modifying Non-WOE Bids
- Show Signatures In WOE
- WOE Require Date Lead Time
- WOE Ship Branch Override

Web Commerce Contact Account Settings

- New WOE Contact Template

Web Commerce Customer Display Settings

Use the following records to control customer display settings:

- Display All Quantity Breaks In WOE
- Display Availability On Checkout Page In WOE
- Display Availability On Order Submit Page In WOE
- Display Availability On Product Return Page In WOE
- Display *CALL* When Price Is Zero In WOE
- Display Catalog Products In WOE
- (Level 2 Only) Disable Display Of Drill Counts in WOE

- (Level 1 Only) Display Frame 1 Category Images In WOE
- Display List Price In WOE
- Display List Price On Order Review Page In WOE
- Display Pricing/Availability In WOE For Nonstocks
- Display Product Availability In WOE
- Display Minimum Package Quantity In WOE
- Display PDW Products in WOE
- Display The Credit Card Information Page In WOE
- (Level 1 Only) Display Two Main Frames In WOE Level 1
- Display Zip Code Validation Screen In WOE
- Enable Branch Availability Popup Window In WOE
- Include Branches With Zero Available In WOE
- Limit WOE Description Length On Product Return Page To
- Number Of Name/Address Characters Displayed In WOE Ship Info Frame
- Order Statuses Displayed In WOE
- Show Availability For Branches in WOE
- (Level 2 Only) WOE Display Manufacturers
- WOE Display Pricing Unit Of Measure For
- WOE Display Substitute Products

Web Commerce Customer Login Settings

Use the following records to control customer login settings:

- Enable WOE Anonymous Logins
- Enable WOE Anonymous Logins & Gather New Acct Info Up Front
- Maximum Allowable Bad Login Attempts In 24 Hours In WOE
- WOE Lost Password Admins
- WOE Number Of Hours To Disable IP If Maximum Bad Logins Exceeded

Web Commerce Product and Price Line Parameters

Use the following records to control product and price lines on your web site:

- Disable Logging of Customer Part Number Changes In WOE
- Display Product Reminder Messages In WOE

- Display Product Status In WOE
- (Level 2 Only) Use Alternate Product Description, If Available, In WOE
- Use DDE Agent Description In WOE
- Valid WOE Product Statuses
- View Custom Part #s And Availability In WOE By Default
- WOE Allowed Price Lines
- WOE Default Part # Used For Creating A Nonstock Item
- WOE Master Product Select Message
- WOE Restrict Customers To Specified Price Lines

Web Commerce General Settings

Use the following records to control general web site settings:

- Allow Duplicate Line Items In WOE Orders
- Allow Line Item Comments In WOE
- Automatically Delete Saved Carts When Selected In WOE
- Close WOE Site For Maintenance
- Default Auth Method For New Credit Cards
- Default WOE Sales Source
- Display Terms Discount As Days Allowed In WOE
- E-mail HTML Logo
- Enable WOE Contact Credit Limits
- (Level 2 Only) Hide the Top Navigation Dropdown in WOE
- (Level 2 Only) Limit WOE Search Results To
- Number Of Days To Save WOE Carts
- Require Email And Phone Number on WOE Shipping Info Page
- Require Ordered By In WOE
- Round To Minimum Package Quantity In WOE
- Valid WOE Ship Vias
- WOE Check To Make Sure IP And WID Always Match
- WOE IP Address (If Different From URL Home Address)

Web Commerce Web Parameters

Use the following records to control World Wide Web specific parameters:

- WOE Clear Out IP Address Lock-Out Records
- WOE Company Websites Directory Information
- (Level 2 Only) WOE Level 2 Top Navigation Color Scheme
- WOE Set Timeout For Web Sessions
- WOE Webmaster Mail-To Address
- WOE Webmaster Phone Number
- WOE World Wide Web Home Page WWW URL
- WOE WWW URL Name

Reorder Pad Settings

Use the following records to control the Generate Customer Product by Demand Index, which is used to set up the Reorder Pad:

- Exclude Exceptional Sales From Customer Demand Index
- Exclude MiscChrg Products From Customer Demand Index
- Number Of Years To Be Included In Customer Demand Index

Quickpad Settings

Use the following record to control the search results using the Quickpad:

- WOE Quickpad Stop At Exact Customer Part # Match

Product Data Warehouse Settings

If you are using the Product Data Warehouse companion product, also set the following records.

- PDW Images Root Directory
- PDW Meta ID For Full Size Image Path
- PDW Meta ID For Thumbnail Size Image Path
- PDW Full Size Image Directory
- PDW Thumbnail Size Image Directory (Below PDW.ROOT.DIR)
- (Level 2 Only) Setting WOE, PDW Image Priorities, IMG
- (Level 2 Only) WOE PDW Catalog Search:Include/Select Separately

Outbound E-mail Commerce Settings

If you are using the Outbound E-mail Commerce companion product, set the following records to enable an e-mail of a forgotten login and password:

- E-mail Request - Subject Of Response For WOE Login/Password
- E-mail Request - Text Of Response For WOE Login/Password

Credit Card Commerce Settings

If you are using the Credit Card Authorization companion product, set the following records to enable real-time credit card authorization:

- Credit Card: WOE Authorization Method
- Force Information To Be Entered On The WOE Credit Card Page
- Valid Credit Card Types

Document Imaging Settings

If you are using the Document Imaging companion product, set this record to identify where web product and product category images are stored:

- Default Document Storage Location ID For WOE

Optional Settings

- Display Waiting Page While Executing WOE Searches
- WOE Enable Cookies
- WOE Fast CGI Virtual Directory (Optional)
- WOE Return Policy Content
- WOE Shipping Policy Content

See Also:

Setup Requirements for Web Commerce

Displaying Your Company Logo On the Web Site

You can display your company logo in the upper left corner of your web site pages. To do this, place a correctly-named GIF image in the images folder on your site.

To display your company logo on the web site:

1. Using an image-editing program, create a GIF image that is 150 pixels wide by 70 pixels high.
2. Save and name the image **toplogo.gif**.
3. Place the image in [root location of your web site]\woeb\images.

   Note: Place the image in [root location of your web site]\remorder\images if you use Web Commerce Level 1.

See Also:

Setup Requirements for Web Commerce

Creating Images for Web Commerce

Identifying the Root Location of Your Web Site

Entering Ship Via Web Descriptions

Enter the description used to identify each ship via on the Shipping Information web page. A ship via web description can be up to 45 characters long. A ship via code can be up to 15 characters long, and is used in ledger and transaction records.

The system determines a customer's default ship via by looking at the following settings, from top to bottom:

- Default ship via set in Customer Maintenance for the ship-to customer.
- Default ship via set in Customer Maintenance for the bill-to customer.
- Default ship via for the web customer's zip code.
- First valid web ship via for the ship-to customer.
- First valid web ship via for the bill-to customer.
- First ship via entered in the Valid WOE Ship Vias control maintenance record.

To enter a web description for a ship via:

1. From the **Files** menu, select **Ship Via** to display the Ship Via Maintenance screen.
2. In the **ShipVia** field, press **F10** and select a ship via.
3. Use the **WOE Desc** hot key to display the WOE Description prompt.
4. At the **WOE Description** prompt, enter the ship via's web description.
5. Press **Esc** to update the ship via record.

See Also:

Setup Requirements for Web Commerce

Triggering E-mail Order Acknowledgements for Web Orders

You can automatically send an e-mail acknowledging each customer's web order. The e-mail uses a standard subject and message text that you create.

The e-mail feature requires the Outbound E-mail Commerce companion product. For more information, see Outbound E-Mail Overview.

To trigger an e-mail order acknowledgement:

1. From the **Files** menu, select **Customer** and open the customer record.
2. Use the **Addl Info** hot key, and then the **Activity Trigger** hot key to display the Activity Trigger Maintenance screen.
3. In the **Trigger Description** field, press **F10** and select **Web Order Entry Submit Order**.
4. In the **Activity Description** field, press **F10** and select **E-mail Message, Email Sales Doc,** or **Email Sales Doc HTML**.

   The **Typ**, **F**, and **B** fields display the default settings.
5. Use the **Activity Props** hot key to display the Send E-mail screen.
6. In the **To** field, enter the e-mail address of the person receiving the acknowledgement, or use the **Dist List** hot key to enter a distribution list with multiple recipients.
7. In the **Subject** field, enter a brief description that shows in the e-mail's subject line.
8. In the message area, enter the e-mail's text. For example: Thank you for your order, which we are now processing.
9. Press **Esc** until the updated customer record is saved.

See Also:

Setup Requirements for Web Commerce

Assigning Activity Triggers

Enabling E-mail of Forgotten Web Logins and Passwords

Your web site can include a link that your customers can use if they forget their password to enter the site. This feature sends an e-mail with the customer's password to the requesting customer.

After enabled, the **Forgot your ID or password? Click here** link displays on the web site Authorization page. When a customer clicks the link, they are prompted to enter their e-mail address. Your system searches for a customer or contact record with that e-mail address, and immediately replies with an e-mail containing the login and password information.

This feature requires the Outbound E-mail companion product. For more information ,see Outbound E-mail Overview.

To enable forgotten login and password e-mails, set up the following control maintenance records:

- E-mail Request - Subject of Response for WOE Login/Password.
- E-mail Request - Text of Response for WOE Login/Password.

For example, in the E-mail Request - Subject of Response WOE Login/Password record, you might enter **Password Reminder** to display in the subject line of the e-mail.

In the E-mail Request - Text of Response for WOE Login/Password record, you must include &LOGIN.ID& and &PASSWORD& in all capital letters. When a user requests a reminder e-mail about a password, the system replaces the two variables with the login and password for the user as defined in the user's contact file. For example:

> This is an e-mail from http://www.eclipseinc.com - We received a request to e-mail your login and password to you. Following is the requested information:
>
> > Login ID: &LOGIN.ID&
> >
> > Password: &PASSWORD&
>
> Thank you for using the Eclipse Web.
>
> Have a nice day.

Also set the WOE Lost Password Admins control maintenance record to define a list of users to notify when a client using the web site clicks the **Forgot your ID or password? Click here** link and the system cannot find the client's e-mail address. If the e-mail address the client enters on the web site does not match the e-mail address in the account on the system, the e-mail sent to the client asks the client to contact an administrator.

See Also:

Setup Requirements for Web Commerce

Sending Sales and Promotional E-mails to Web Customers

Web Commerce Level 2 sites contain a box in the lower left side of the screen where users can sign up to receive notification of special sales and promotions through e-mail. When a user enters their e-mail address and clicks **Go**, the system adds the users e-mail address to the AUTO-WOE e-mail distribution list on the host. You can then use the distribution list to send information about sales and promotions to your users. You can also add and remove names from the AUTO-WOE distribution list, as necessary.

To send sales and promotional E-mails to web customers:

1. When sending an e-mail, use the **Dist List** hot key to display the Distribution List screen.
2. Use the **Recall** hot key and enter **AUTO-WOE** at the prompt.

   All the addresses currently signed up to receive e-mails about special offers and promotions display in the Distribution List screen.

   You can add and delete users as necessary each time you send an email. The changes are only used in the e-mail you are currently sending. To save the changes to the AUTO-WOE distribution list, use the **Save** hot key in the Distribution list and save the list as AUTO-WOE. Enter a different list name to save the addresses as a separate list.
3. Press **Esc** to return to the Send-Email screen.

See Also:

Creating E-mail Distribution Lists

Enabling Credit Card Authorization for Web Orders

Enable credit card authorization on your web site to authorize sales at the time orders are placed, or later.

Credit card authorization requires the Credit Card Authorization companion product. For more information, see Credit Card Authorization Overview.

To enable credit card authorization, set the Credit Card: WOE Authorization Method control maintenance record. If this control maintenance record is not defined the system uses the setting in the Default Auth Method For New Credit Cards control maintenance record.

See Also:

Setup Requirements for Web Commerce

Online Reorder Pad Setup

Customers can use the online Reorder Pad to order products they purchased before. The Reorder Pad is useful for repeat customers who frequently buy the same products.

Products listed on the Reorder Pad come from a system administrator running the Generate Customer by Demand Index program. To keep Reorder Pad information current, use the Phantom Scheduler to run the program regularly.

Depending on the amount of sales involved, it can take some time to build the customer demand index. We recommend scheduling the index to run over a weekend.

Setting Up Reorder Pad Records

To set up the Reorder Pad, set the following control maintenance records:

- Exclude Exceptional Sales From Customer Demand Index
- Exclude MiscChrg Products From Customer Demand Index
- **Number Of Years To Be Included In Customer Demand Index**

Keeping the Reorder Pad Current

Rebuild the index regularly, so it includes all products your customers recently purchased. For details, see Generate Customer Product by Demand Index.

To keep products on the reorder pad current:

1. From the **Reprts > End of Month Reports #2** menu, select **Generate Customer Product by Demand Index**.
2. Use the **Schedule** hot key to schedule the program to run regularly.

See Also:

Setup Requirements for Web Commerce

Control Maintenance Records for Web Commerce

Product or Price Line External References Setup

Provide your customers additional product information from your web site by linking to other web sites. You can create links for products or price lines, which display on the web site product information page.

Each link contains the common string to access a company's web address such as http://widgetproducts.com/products, and a unique file path that changes for each link. Use the Use DDE Agent Description In WOE control maintenance record to determine if the system uses the product description or the DDE agent description as the link text on the web site.

Complete the following tasks to create links:

- Set the web site address.
- Set the file path to the specific web page.

Setting the Web Site Address

Use DDE Agent Maintenance to set an *agent ID* that identifies the common string in a company's web site address. This address is the prefix for the file path in the **Parameter Data** field in Product External References. Used together, the prefix and file path create a complete link.

To identify a web site address:

1. From the **Tools** menu, select **DDE Agent Maintenance** to display the DDE Agent Maintenance screen.
2. In the **Agent ID** field, enter a code, up to five characters long, that identifies the company, government agency (for example, OSHA), or any other entity whose web site you want to access.

   Press **F10** to display a list of codes and the **New** option.
3. In the **Description** field, enter a more complete description of the company, agency, web site, or other information contained on the web site. For example, Widget Product Catalog.
4. In the **Subroutine** field, enter DDE.WEB.BROWSER, the name of the program used to open and test the link in a browser.
5. In the **Data Prefix** field, enter the common string required to access the web site address or other entity. Use as many characters as needed in the following format:

   http://widgetproducts.com/products/

   This address acts as a prefix to the information entered in the **Parameter Data** field on the Product External References Maintenance screen to make a complete link to a web site or specific product information.

6. Press **Esc** to save the information and exit the screen.
7. Continue with Setting the File Path to the Specific Web Page.

Setting the File Path to the Specific Web Page

Define the specific web page link *after* creating a DDE Agent ID for a web site. The file path completes the link from a product or price line to a web page. Use the Product External References Maintenance screen to create a link to a product, or a link to all products in a price line.

- Open the screen from Product Maintenance to link to a product, as described in the procedure below.
- Open the screen from Price Line Maintenance to link to all products in the price line. To do this, select **Files** > **Price Maintenance** > **Price Line**, then use the **Prod Xrefs** hot key.

To link to a product or price line web page:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display a product and use the **Xref** hot key to open the Product External References Maintenance screen.
3. In the **Agent** field, press **F10** and select the Agent ID for the web site you defined in Setting the Web Site Address.

   After you enter an agent ID, the **Description** field displays the description you entered on the DDE Agent Maintenance screen when defining the agent ID. Edit the description at the product level, if necessary.

If the...	Then...
Agent field is populated	the system uses the description in DDE Agent Maintenance for the agent, even if you change the description in the **Description** field. The system uses the domain and path for the agent in DDE Agent Maintenance, followed by the information in the **Parameter Data** field on this screen to create the link.
Agent field is not populated	the system uses the description in the **Description** field and the path you provide in the **Parameter Data** field to create the link.

4. In the **Parameter Data** field, enter the file path. For example, entering bigwidgetspage.htm in this field completes a link to http://widgetproducts.com/products/bigwidgetspage.htm.

If the...	Then...
Parameter Data field is blank	the system uses only the **Data Prefix** field you entered in Setting the Web Site Address for the complete web site address.
Data Prefix field on DDE Agent Maintenance screen is blank	the system uses only the **Parameter Data** field for the complete web site address.

If the file path exceeds the length of the parameter field, use the **Expand** hot key to enter the full path. Paths that extend beyond the length of the **Parameter Data** field are contained on one line. Use the **Expand** hot key again to view and edit the file path.

5. Use the **Test** hot key to open the web page in your default browser.

   The browser opens using the **Data Prefix** web address, combined with the **Parameter Data** file path.

6. To enter another web site address, repeat steps 3 through 5.
7. Press **Esc** to save the settings and exit the screen.

See Also:

Setup Requirements for Web Commerce

Editing Web Pages

Web developers can edit web pages to include custom code or features. Using the Web HTML Maintenance feature, you can open any page's programming code for viewing or editing. You can also undo edits. Similar features allow you to edit e-mail templates.

Before editing any pages, ensure you have a solid understanding of the following information:

- HTML tags and coding
- JavaScript web programming language
- Eclipse features, variables, and editing techniques

To view web page source code:

1. From the **System** > **Custom** > **Web Commerce** menu, select **Web HTML Maintenance**.
2. At the Web Order Entry prompt, enter the web order entry level your company uses to open the Web Level HTML Maintenance screen.

   The following information displays for each web page defined in your web site:

Field	Description
Description	Describes the web page. For example, the Account Login page is the page where your customers log in to your site.
HTML	Indicates whether the page code is original, as provided by Eclipse, or has been modified. "Site" displays in this field when a page is opened in the system for editing.

3. Use the cursor to select a page for viewing.
4. Use the **View Original** hot key to open the original page code for viewing only.
5. Press **Esc** to close the viewing screen. The system does not save any changes.

To edit web page source code:

1. From the **System** > **Custom** > **Web Commerce** menu, select **Web HTML Maintenance**.

   The following information displays for each web page defined in your web commerce system:

Field	Description
Description	The web page description. For example, the Account Login page is the page where your customers log in to your site.
HTML	Indicates whether the page code is Original, as provided by Eclipse, or has been modified. Site displays in this field when a page is opened in the system for editing.

2. Use the cursor to select a page for editing.
3. Use the **Edit** hot key to open the programming code for editing.

Important: Do not alter any code designated with &CODE$ when editing web pages. Codes with this designation are variables used to extract data from the database. Altering these variables could cause the web site to stop functioning properly.

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4. When you finish editing, press **Esc** to close the editing screen and *save* your changes.
5. Press **Esc** again to close the Web HTML Maintenance screen.
6. Test the pages you edited in a web browser to ensure they behave as expected.

To undo edits to web pages:

1. From the **System > Custom > Web Commerce** menu, select **Web HTML Maintenance**.
2. At the Web Order Entry prompt, enter the web order entry level your company uses to open the Web Level HTML Maintenance screen.
3. Use the cursor to select a page and use the **Undo Custom** hot key.
4. Respond to either of the following prompts:

Prompt	Description
Undo Changes to <web page file name> (Y/N)	Displays if the page has only been edited one time. Enter **Y** to revert to the original page code. The **HTML** field indicator changes back to Original.
Undo <web page file name> Ver# <revision number>/All Versions/Nothing? (V/A/N)	Displays if the page has been edited more than one time. Enter **A** to revert to the original page code, undoing All Versions, or enter **V** to only undo the version number listed in the prompt. Enter **N** to take no action.

After undoing all changes, the **HTML** field indicator changes back to Original.

See Also:

Setup Requirements for Web Commerce

Providing Different Web Commerce Views for Customers

Your company may have multiple web sites that different customers use to shop online with you. You can define which web site a new user sees by setting up multiple web site names and URLs. Maintaining multiple web sites gives you the ability to provide a different color scheme, product categories, price lines, and other anonymous customer data based on the URL the user uses to access the Web Commerce authorization page.

To provide different web site views for customers:

1. From the **System > System Files** menu, select **Control Maintenance** to display the Control Maintenance screen.
2. Display the **Company Websites Directory Information** control maintenance record.
3. Enter the company, directory, and web site information as described in the Company Websites Directory Information control maintenance record description.
4. Use the **Customer Template** hot key to select a customer record to use as a template.

   Anonymous logins for each company defined in the Company WebSites Directory Information screen use the data specified for the template customer you select, instead of the settings in the **WOE Customer Template** control maintenance record.
5. Press **Esc** to save your changes and exit the screen.

See Also:

Enabling Anonymous Logins to Web Commerce

Defining Web Commerce Product Availability Display Settings

Use the following control maintenance records to determine how product availability displays on your web site.

- Display Pricing/Availability In WOE For Nonstocks
- Display Product Availability In WOE
- Display Availability On Checkout Page In WOE
- Display Availability On Order Submit Page In WOE
- Display Availability On Product Return Page In WOE
- Enable Branch Availability Popup In WOE
- Include Branches With Zero Available In WOE
- Show Availability For Branches In WOE

The following table provides information about how the control maintenance record settings and settings in the customer record affect how and where product availability displays for a customer on your web site:

Control Maintenance Record	Product Availability Display
Display Pricing/Availability In WOE For Nonstocks	Indicates whether the system displays pricing and availability for nonstock items in WOE. The default is No. • If you set this record to **Yes**, pricing and product availability display for nonstock items in WOE. • If you set this record to **No**, pricing and product availability display *Call* in the pricing column to prevent your customer from seeing the price and availability of a nonstock item in WOE. • If you set this record to **Avail,** pricing and product availability display for nonstock items only if the availability is non-zero. For pages that display only pricing, the system displays *Call* in the column, regardless of availability.
Display Product Availability In WOE	The default, system wide display setting for product availability information on your web site. • If you set this record to **Yes**, product availability displays on the more product information page, as well as the order review page, order submit page, and product return page if allowed in their individual control maintenance record settings. • If you set this record to **No**, the web site does not display product availability information in any location, unless the **Display Product Availability** field in the customer record is set to show availability.

Control Maintenance Record	Product Availability Display
Display Availability On Checkout Page In WOE	Indicates whether the system displays product availability information on the order review, check out, and bid review pages: • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is set to show availability, then the product availability displays on the order review page. • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is set to **Hide**, then the product availability does not display on the order review page. • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is blank, the system looks at the setting in the **Display Product Availability** control maintenance record and follows the flow as described in the above two bullets. • If you set this record to **No**, product availability does not display on the order review page.
Display Availability On Order Submit Page In WOE	Indicates whether the system displays product availability information on the order submit page: • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is set to show availability, then the product availability displays on the order submit page. • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is set to **Hide**, then the product availability does not display on the order submit page. • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is blank, the system looks at the setting in the **Display Product Availability** control maintenance record and follows the flow as described in the above two bullets. • If you set this record to **No**, product availability does not display on the order submit page.

Control Maintenance Record	Product Availability Display
Display Availability On Product Return Page In WOE	Indicates whether the system displays product availability information on the product return page: • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is set to show availability, then the product availability displays on the product return page. • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is set to **Hide**, then the product availability does not display on the product return page. • If you set this record to **Yes**, and the **Display Product Availability** field in the customer record is blank, the system looks at the setting in the **Display Product Availability** control maintenance record and follows the flow as described in the above two bullets. • If you set this record to **No**, product availability does not display on the product return page. • If you set this record to **Show Info Icon**, an information icon displays in place of a number for the product availability on the product return page. If the Enable Branch Availability Popup In WOE control maintenance record is set to **Yes**, and the user clicks the icon, a popup window displays with the product availability information. If Enable Branch Availability Popup In WOE is set to **No**, and the user clicks the icon, the more product information page displays for that item.
Enable Branch Availability Popup In WOE	Indicates whether the system displays links to the branch availability popup window: • If you set this record to **Yes**, and the Display Availability On Order Review Page In WOE control maintenance record is set to **Yes**, then the checkout and modified bid review pages display a link that opens a popup window with the product availability information. • If you set this record to **Yes**, and the Display Availability On Product Return Page In WOE control maintenance record is set to **Yes**, then the product return page displays a link that opens a popup window with the product availability information. • If you set this record to **No**, product availability information does not display in a popup window.
Include Branches With Zero Available In WOE	Indicates whether the system displays product availability for branches that have zero on-hand quantity. • If you set this record to **Yes**, product availability displays for all branches, regardless of their on-hand quantity. • If you set this record to **No**, product availability displays for only branches that have an on-hand quantity greater than zero.
Show Availability For Branches In WOE	Indicates for what branches to get availability. Set this record to **Ship Branch**, **Home Territory**, **Auth Branches**, or **All Branches**. If you set this record, and the Show Availability For Branches field in the customer record is set, the system uses the setting in the customer record. If the customer record field is blank, the system uses the setting in this control maintenance record. If this control maintenance record is blank, the system displays product availability for the shipping branch.

Defining Catalog or Nonstock Products for Web Commerce

On the web site, your customers can order products that you can special order for them, but that you typically do not stock in your warehouse. When a user enters a nonstock item on an order, the system adds the item to the order or bid as it would a stocked item if the Display Pricing/Availability In WOE For Nonstocks control maintenance record is activated.

The system places the product that you specify in the WOE Default Part # Used For Creating A Nonstock Item control maintenance record on the order for each nonstock item. The system uses the description from the product that you enter in the control maintenance record. For your users clarity, consider using a product description such as "Catalog Item" instead of "Nonstock Item."

See Also:

Control Maintenance Records for Web Commerce

Setup Requirements for Web Commerce

Restricting Available Price Lines for Web Commerce Customers

If you have products in price lines that you do not want to sell through your web site, you can define which price lines are available through your site either by individual customer or globally for all customers.

Use the following control maintenance records to define which price lines display on your web site:

- WOE Restrict Customers To Specified Price Lines - If set to **Yes**, the web site displays the price lines defined for each individual customer. If no price lines are defined in the customer record, the web site displays the price lines listed in the WOE Allowed Price Lines control maintenance record.
- WOE Allowed Price Lines - If price lines are defined in this record, the web site displays only these records for all customers who access your web site. If the WOE Allowed Price Lines control maintenance record is blank, and the WOE Restrict Customers To Specified Price Lines control maintenance record is set to **No**, all the price lines defined in your system are available on your web site.

To restrict price lines available on the web by customer:

1. Set the WOE Restrict Customers To Specified Price Lines control maintenance record to **Yes**.
2. From the **Files** menu, select **Customer** and open the customer record for whom you want to restrict price line availability.
3. Use the **Lines** hot key to display the Price Line Selection screen.
4. Enter the price lines to which you want the customer to have access using your web site.

   Note: Entering price lines in this screen also limits customer-related reports to include only the price lines listed.
5. Press **Esc** to save the price line list.
6. Press **Esc** again to save the customer record and exit the screen.

To restrict price lines available on the web for all customers:

1. Open the WOE Allowed Price Lines control maintenance record.
2. In the Price Line Selection screen, enter the price lines you want to display on your web site.
3. Press **Esc** to save the list.

Linking Similar Products in Web Commerce

You can display linked, similar products on the Additional Product Information page. Similar products may include products you consider as a substitution for a product you may not currently have in stock, or additional items that a customer may be interested in when buying a product. For example, if a customer is purchasing a faucet, they may also be interested in the plumbing supplies required to install the faucet.

Define substitutions for a product in Product Maintenance as you would products you sell using the system's Sales Order Entry program. For more information, see Assigning Substitute and Add-On Products. The system only displays substitute products to web commerce users if the customer's home branch is defined in the **Allowed @ Br/Tr** field. If the home branch is not allowed, the system does not show the substitute products.

Create product kits in Product Maintenance to link products that are likely sold together. These products display on the Additional Product information page on your web site under the heading **Other Items You May Like**, and are also available for sale through the Sales Order Entry program. For more information, see Creating Product Kits.

Set the WOE Display Substitute Products control maintenance record to **Yes** and the **Accepts Substitutes** field on the customer's Miscellaneous Customer Data screen to **Yes**. The system displays substitute products on the product detail screen for those customers.

> **Note:** Linked products only display in Web Commerce Level 2 sites.

See Also:

Defining Product Availability Display Settings

Product Drill Categories Overview

For Web Commerce Level 2 sites, use drill categories, or drill downs, to organize the products you offer for sale on your web site. Your web site users can then browse and order products using the drill categories. You need the PRODUCT.CAT.MAINT authorization key to create drill categories and subcategories.

You can define two drill category types:

- Company-wide drill categories
- Customer-specific drill categories

Use drill categories to offer different sets of products to different customer types. For example, you could define a drill category specific to your electrical customers that displays only products applicable to the electrical industry. After a customer logs in, the company-wide categories display, unless customer-specific categories are defined.

The following tasks are common for using and setting up drill categories for level 2 web sites:

- Creating drill categories.
- Adding subcategories to drill downs.
- Associating products with subcategories.
- Storing subcategory images.

See Also:

Setup Requirements for Web Commerce

Creating Drill Categories

For Web Commerce Level 2 sites, use drill categories, or drill downs, to organize the products you offer for sale on your web site. Use WOE Drill Down Maintenance to create company-wide and customer-specific drill categories of products. How you access the screen determines whether you create a company or customer category. After the screen is open, you use similar procedures to create drill categories and subcategories.

Note: Drill categories are not branch specific. Therefore, product families used in drill categories use the family with the "All" branch. If you change a family's values that is used in a drill category, you must rebuild the family and then rebuild the drill category.

To create a drill category:

1. Display the WOE Drill Down Maintenance screen in one of the following ways:

To create...	From the...
a company-wide category	**System > Custom > Web Commerce > Web Drill Maintenance** menu, select **WOE Drill Down Maintenance**.
a customer-specific category	**Files** menu, select **Customer**. With a customer displayed, use the **Remote** hot key, then the **WOE Info** hot key, and then the **WOE Drills** hot key.

2. In the **ID** field on a blank line, type **New**.

   The system assigns and displays a unique identification number for the drill category.

3. In the **Description** field, enter the drill category name up to 35 characters in length and press **Enter**.
4. For each additional drill category, repeat steps 2 and 3 on a new line.
5. Use the **Re-Build Cache** hot key to rebuild the drill drown paths cache.
6. Press **Esc** to save your changes and exit the screen.

See Also:

Adding Subcategories to Drill Categories for Your Web Site

Creating Drill Category Templates

Product Drill Categories Overview

Adding Subcategories to Drill Categories

After creating drill categories, you can group products into multiple levels of subcategories within the main drill category. You can also link an image, such as a product photograph, with a subcategory. The browser displays the image next to the subcategory items. Using images helps customers visually identify the subcategory. For more information about creating and adding images to a subcategory, see Creating Images for Web Commerce.

To add a subcategory to a drill category:

1. Display the WOE Drill Down Maintenance screen in one of the following ways:

To create...	From the...
a company-wide subcategory	**System** > **Custom** > **Web Commerce** > **Web Drill Maintenance** menu, select **WOE Drill Down Maintenance**.
a customer-specific subcategory	**Files** menu, select **Customer**. With a customer displayed, use the **Remote** hot key, then the **WOE Info** hot key, and then the **WOE Drills** hot key.

2. Select the drill category you want to add a subcategory to and use the **Expand** hot key.

   A second WOE Drill Down Maintenance screen displays with the selected drill category at the top of the screen.

3. In the **ID** field on a blank line, do one of the following:

To...	Do this...
add an existing subcategory	enter the existing subcategory's description.
create a subcategory	type **New**. The system assigns an identification number for the subcategory.

4. In the **Description** field, do one of the following:

To...	Do this...
add an existing subcategory	verify that the correct name displays.
create a subcategory	enter the subcategory name.

5. To link an image with the subcategory, use the **Img** hot key.
6. At the **Image Path for [subcategory description]** prompt, enter the web site directory path to the image:

   If you store the image on your Internet Gateway computer in the \woeb\images directory, enter: **\woeb\images\filename.jpg**. If not, enter the complete path. For example, http://www.yourcompany.com/woeb/images/categories/electrictools.jpg

7. For each additional subcategory, repeat steps 3 through 6 on a new line.
8. Press **Esc** to save your changes and exit the screen.

To add a subcategory to a subcategory:

1. Display the WOE Drill Down Maintenance screen in one of the following ways:

To create...	From the...
a company-wide subcategory	**System** > **Custom** > **Web Commerce** > **Web Drill Maintenance** menu, select **WOE Drill Down Maintenance**.
a customer-specific subcategory	**Files** menu, select **Customer**. With a customer displayed, use the **Remote** hot key, then the **WOE Info** hot key, and then the **WOE Drills** hot key.

2. Select the drill category you want to add a subcategory to, and use the **Expand** hot key.

   A second WOE Drill Down Maintenance screen displays with the selected product category at the top of the screen.

3. With the cursor selecting a subcategory, use the **Expand** hot key.

   A third WOE Drill Down Maintenance screen opens. The selected product subcategory displays at the top of the screen.

4. Follow steps 3 through 6, in the previous procedure.

See Also:

Associating Products with Subcategories

Storing Subcategory Images

Product Drill Categories on Your Web Site Overview

Associating Products with Subcategories in Drill Categories

For Web Commerce Level 2 sites, use drill categories, or drill downs, and subcategories to organize the products you offer for sale on your web site. Associate products with the last subcategory in a drill path. Your customers can find the products they want by clicking the preceding category and subcategories. For example, your customers may click Electrical Products, then Electrical Sundries to see a list of sundry products like couplings, clamps, and connectors.

You can associate products using the following:

- Product families
- Keywords
- Product Data Warehouse (PDW) Meta IDs

To associate products with a subcategory:

1. Display the WOE Drill Down Maintenance screen in one of the following ways:

For ...	From the...
a company-wide subcategory	**System** > **Custom** > **Web Commerce** > **Web Drill Maintenance** menu, select **WOE Drill Down Maintenance**.
a customer-specific subcategory	**Files** menu, select **Customer**. With a customer displayed, use the **Remote** hot key, then the **WOE Info** hot key, and then the **WOE Drills** hot key.

2. Selecting a product category and use the **Expand** hot key to display a second WOE Drill Down Maintenance screen.

   The selected product category displays at the top of the screen, with subcategories below.

3. Select a subcategory and use the **Expand** hot key to display a second WOE Drill Down Maintenance screen.

   The selected category displays at the top of the screen. If you are at the end of a drill path with meta items assigned, the WOE Drill Meta Information Maintenance screen displays.

4. Use the **Meta Information** hot key to display the WOE Drill Meta Information Maintenance screen.

   The selected subcategory displays at the top of the screen, with meta information below.

5. In the **Meta ID** field enter the Eclipse product number, family, keyword, or PDW Meta ID of the product you want to assign to the subcategory. The system displays the other field information.

For a...	Enter an...	The system displays...
Product family	ampersand (&) followed by all or part of the family name.	The product family description and ID. All products in the product family are associated with this product subcategory. **Note:** To display a product family in Web Commerce, set the **Branch/Territory** field on the Product Family Maintenance screen to **All**.
Keyword	exclamation point (!) followed by the keyword.	The keyword in the **Meta ID** field and the actual keyword in the **Values** field. All products with this keyword in their product description are associated with this product subcategory.
PDW Meta ID	meta ID proceeded by a period (.).	The Meta ID and Meta Description. All products in the PDW using this Meta ID are associated with this product subcategory.

Use the **Multiple Values** hot key to save, clear, or recall a list of items comprising a **Meta ID** field entry.

Note: When entering an exact meta ID, for example, .2345, the system validates the entry. It does not accept your entry if it cannot validate it.

6. Repeat steps 4 and 5 to associate additional products with the subcategory.
7. Press **Esc** to return to the WOE Drill Down Maintenance screen.
8. Use the **Re-Build Cache** hot key to calculate the number of products in the subcategory.

   This number displays in parentheses next to the subcategory name, when it is listed on the main shopping cart page of your web site.

See Also:

Creating Drill Categories

Product Drill Categories Overview

Rebuilding the Drill Category Cache

Items contained in web drill category paths, or drill down paths, are organized in a drill down cache. When you create new drill categories and subcategories, rebuild this cache to recalculate the number of products in the categories and subcategories. Rebuilding ensures that drill categories display properly on the main shopping cart page of your web site.

To rebuild the entire drill category cache:

1. From the **System > Custom > Web Commerce** menu, select **Web Drill Maintenance**.
2. Select **Recache Drill Down Paths**.

   The system displays a warning telling you that you are about to rebuild the entire drill cache.
3. Type **continue** to start the rebuild process. Press **F12** to exit from the prompt without rebuilding the cache.

To rebuild the cache for a single drill category path:

1. Add drill categories and subcategories to a web drill down path.
2. Use the **Re-Build Cache** hot key on the WOE Drill Down Maintenance screen to rebuild the cache for the drill category path to which you are adding or changing items.
3. Press **Esc** to exit the WOE Drill Down Maintenance screen.

See Also:

Creating Drill Categories

Product Drill Categories Overview

Creating Drill Category Templates

For Web Commerce Level 2 sites, use drill categories, or drill downs, to organize the products you offer for sale on your web site. Use WOE Drill Down Template Maintenance to categorize products that you can use for a group of customers who order similar products. For example, create a list of products to display in the Products column of your web site that contains those items your plumbing customers by most often. Templates are constructed from drill categories and subcategories created in WOE Drill Down Maintenance.

To create a drill category template:

1. From the **System > Custom > Web Commerce** menu, select **Web Drill Template Maint** to display the WOE Drill Template Maintenance screen.
2. In the **Template Name** field, type **New**.
3. At the prompt, enter a name, up to 20 characters, that describes the types of products listed in the template, such as Plumbing.
4. In the **ID** field, enter one of the following:
   - The number of the drill category, if you know it, preceded by a period (.).
   - The name or first few letters of the drill category. The system may display a list of items from which to select.

   The system populates the **ID** field and the **Description** field with the selected drill category.
5. Press **Esc** to save the template.

To associate a drill category template with a customer:

1. From the **Files** menu, select **Customer** and display a customer record.
2. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
3. Use the **WOE Info** hot key to display the B2B/WOE Remote Order Entry Parameters screen.
4. In the **Display ID** field, enter the template name to display for this customer.
5. Press **Esc** to save your changes and exit the screen.

See Also:

Creating Drill Categories

Adding Subcategories to Drill Categories

Assigning Images to Subcategories in Drill Categories

You can set up your web site to display product images next to the subcategories in a drill category list. You can only attach product images to subcategories, not drill categories.

Store drill category images on your Internet Gateway computer in the \woeb\images directory. The directory path is \\Inetpub\wwwroot\woeb\images.

You can also store the images in a virtual subdirectory on a dedicated imaging server. For example, if you are using electrictools.jpg as your image, the directory path to the image might be http://www.yourcompany.com/remorder/images/category/electrictools.jpg.

To assign an image to a subcategory:

1. Ensure the image you want to assign is the correct size and format. We recommend 200 pixels wide by 200 pixels high.
2. Display the WOE Drill Down Maintenance screen in one of the following ways:

For ...	From the...
a company-wide subcategory	**System** > **Custom** > **Web Commerce** > **Web Drill Maintenance** menu, select **WOE Drill Down Maintenance**.
a customer-specific subcategory	**Files** menu, select **Customer**. With a customer displayed, use the **Remote** hot key, then the **WOE Info** hot key, and then the **WOE Drills** hot key.

3. Select the subcategory to which you want to attach the image.
4. Use the **Img** hot key and enter the directory path to the image as described above at the prompt.

   The **Img** hot key is disabled for drill categories. Expand a drill category to access its subcategories.

See Also:

Creating Images for Web Commerce

Product Drill Categories Overview

Creating Images for Web Commerce

Using an image-editing program, create your web images using the following criteria:

- Name images using a standard to help you identify and organize image files by name.
- Make your company logo 150 pixels wide by 70 pixels high and save it in GIF format with the required name. For more information, see Displaying Your Company Logo on the Web Site.
- Make each product image 200 pixels wide by 200 pixels high.
- Make banner ads the required sizes. For more information, see Banner Advertising Overview.
- Use standard web graphic formats, such as JPEG or GIF.

File Type	Advantages	Disadvantages
JPEG (.jpg)	Best format for photos, as it can display millions of colors. Can select file compression options.	Loses some quality each time you save as JPEG. Cannot have a transparent background.
GIF (.gif)	Good for images with large areas of solid color, such as logos, icons, and buttons. Can have a transparent background.	Limited to 256 colors, not enough for most photos. Proprietary format.
PNG (.png)	Has most advantages of JPEGs and GIFs. Can have a transparent background.	Only version 4 or later web browsers support the PNG format.

See Also:

Identifying the Root Location of Your Web Site

Accessing Images Stored on Remote Servers

PDW Product Images in Web Commerce

If your company uses Product Data Warehouse, product images are stored in your PDW catalog and you can use these images on your web site. When a product from the PDW catalog displays on your web site, the system uses a *Meta ID* to locate and display the image.

To use PDW for product images, set the following control maintenance records:

- PDW Images Root Directory
- PDW Meta ID For Full Size Image Path
- PDW Meta ID For Thumbnail Size Image Path
- PDW Full Size Image Dir
- PDW Thumbnail Size Image Directory

See Also:

Using Document Imaging for Product Images

Creating Images for Web Commerce

Attaching Images to Products for Web Commerce

If your company uses the Document Imaging companion product, you can attach images to a product's record that display with the product description on your web site. When the product displays on your web site, the system displays the attached image.

Before attaching an image to a product, create and store the image in a subdirectory of your web site or in a *virtual subdirectory* on another dedicated imaging server. For better performance use your web server.

When using Document Imaging for product images:

1. Create an image Storage ID location.
2. Enter that Storage ID in the Default Documentation Storage Location ID For WOE control maintenance record.
3. Create a document profile for web images.
4. Attach an image to a product.

To attach an image to a product:

1. From the **Files** menu, select **Product** and display the product to which you want to attach the image.
2. Using your mouse, drag and drop an image file onto the screen. This opens the Attachment Indexing screen.
3. In the **Doc Profile** field, ensure that the document profile for web images is selected. If necessary, press **F10** from the empty field and select the correct profile.
4. Complete the Attachment Indexing screen, then use one of its hot keys:
   - **Index –** Copies the image file to the storage location, and deletes the image file from your system.
   - **Index W/O Delete –** Copies the image file to the storage location, but also leaves the original file on your system. This is the safest choice, if you are not sure whether to delete the original.
5. Press **Esc** to save and close the Product Maintenance screen.

   When you reopen this product's Product Maintenance screen, the upper-right corner displays an image indicator (*i*). This indicates an image is attached.

See Also:

Creating Images for Web Commerce

Accessing Images Stored on Remote Servers

Using PDW for Product Images

Identifying the Root Location of Your Web Site

Before you can store and access images on a remote server, you need to identify the root location of your web site.

To identify the root location of your web site:

1. Access Microsoft Internet Information Services (IIS) Manager.

   If you are not familiar with Microsoft IIS Manager, call Eclipse Support for assistance.

2. Right-click the web site name and select **Properties** to display the Website Properties window.
3. Click the **Home Directory** tab.

   The **Local Path** field displays the Web site's root location.

See Also:

Accessing Images Stored on Remote Servers

Accessing Images Stored on Remote Servers

If you store images on a separate computer, such as a dedicated imaging server, you must create a virtual subdirectory on your web site. A virtual subdirectory looks and acts like a real subdirectory, but instead of storing images, it lets you point to another shared directory on your network where the images are actually stored.

To access an image stored on a remote server:

1. Access Microsoft Internet Information Services (IIS) Manager.

   If you are not familiar with Microsoft IIS Manager, call Eclipse Support for assistance.
2. Right-click your web site file, and select **New**.
3. Select **Virtual Directory** to display the Virtual Directory Creation Wizard and click **Next**.
4. At the prompt, enter an alias name to create the virtual subdirectory for your web site and click **Next**.
5. At the prompt for the **Web Site Content Directory**, enter the path to the computer and shared directory where the images are stored and click **Next**.

   Use the Universal Naming Convention (UNC) format, where *server* is the computer name and *images* is the shared directory name. For example, \\server\images.
6. At the prompt, enter the **User Name** and **Password** required to access the shared directory, and click **Next**.

   Ensure the user name and password have been set up on the server with the shared directory. If you enter an incorrect name or password, you do not receive an error message until you finish. If you are unsure of the user name and password, contact your system administrator or Eclipse Support.
7. When prompted, re-enter the password for confirmation.

   The Access Permissions dialog box displays.
8. In the Access Permissions dialog box, verify that only the **Read** and **Execute** boxes are checked. Clear all the other check boxes, and click **Next**.
9. Click **Finish** to complete the setup.

See Also:

Identifying the Root Location of Your Web Site

Banner Advertising Overview

The Web Commerce application offers several optional advertising areas within the browser window. Banners can display product images, company logos, and special ads. Each banner can also be a link, for example, linking to a product information page or another company's web site.

Banner advertisements are applicable only to Web Commerce Level 2 sites.

Specials Banner

The specials banner advertises product specials. The banner displays above the product shopping section and contains links to the featured products. If you do not use the specials banner, the shopping section of the window expands to fill that space.

Introduction Banner

The introduction banner displays in the shopping section of the main shopping cart page. Use this banner to advertise a preferred price line or to display vendor ads. If you do not use an introduction banner, a default banner containing Help topics displays. Introduction banners are 470 pixels wide by 300 pixels high.

Full and Half Banners

You can display one full banner ad or two half banner ads across the bottom of the web site window. If you do not use full or half banner ads, a default Eclipse banner displays. Full banners are 470 pixels wide by 60 pixels high. Half banners are 235 pixels wide by 60 pixels high.

See Also:

Creating the Specials Banner

Creating Banner Ads

Creating Images for Web Commerce

Viewing Banner Ad Statistics

Creating Specials Banners in Web Commerce

Use the specials banner to advertise your product specials. This banner contains links to the featured products. The horizontal banner displays below the header information at the top of the browser, and above the product shopping section.

The specials banner is only available in Web Commerce Level 2 sites.

Images and links for up to four products display at one time. If you have more than four specials, the banner contains navigation arrows on either side. If you do not use the specials banner, the shopping section of the window expands to fill the space.

Complete the following steps to create a specials banner:

- Create a customer price class named WEB.
- Assign products to the WEB price class.

To create a customer price class named WEB:

1. From the **System > System Files** menu, select **Control Maintenance** to display the Control Maintenance screen.
2. Open the Valid Customer Price Classes control maintenance record.

   The Valid Customer Price Classes screen displays, listing existing price classes.
3. In the **Class** column, move the cursor to a blank line and type **WEB**.
4. In the **Level** column, type **1**.
5. Press **Esc** to save your changes.

To assign products to the WEB price class:

1. From the **Files > Price Maintenance** menu, select **Quick Sell Matrix** to display the Quick Sell Matrix Maintenance screen.
2. In the **Class** field, type **WEB**.
3. Press **Enter** to move the cursor from the header to the body of the screen.

   If matrix cells exist for this price class, a list displays.
4. In the **Defined Cells** column, position the cursor on a blank line and enter a product name.

5. In the **Typ** column, press **F10** and specify the matrix type to assign to the product.

Matrix Type	Description
C	**Combo Quantity Break** - Indicates there are quantity breaks based on the combined sale of all items within all sell groups included in the corresponding combination group. Define quantity breaks on the Combination Group Maintenance screen. Define quantity break formulas for each sell group in the corresponding matrix cell. When a combined sale reaches a break point, the system looks in each group matrix cell for the price basis and formula assigned to that break point to use to price the products that are part of that group.
D	**Different Matrix** - Indicates the matrix cell is a customer-specific cell that points to another matrix cell for pricing.
G	**Group Quantity Break** -Indicates quantity breaks are defined on the Sell Matrix Maintenance screen, and they are based on the combined sale of all items on an order that are assigned to the indicated sell group.
M	**Matrix Quantity Break** - Indicates quantity breaks are defined on the Sell Matrix Maintenance screen, and they are based only on the sale of the same product.
N	**No Quantity Break** - Indicates no quantity breaks are assigned to the matrix cell.
O	**Override Cost Only** - Indicates an override cost has been assigned to the product in the matrix cell.
P	**Product Level Quantity Break** - Indicates quantity breaks are defined for the product on the Product Price Maintenance screen, and are based only on the sale of the indicated product.

6. In the **PrBasis** field, press **F10** and select the price basis to use in the price calculation.

   The price basis works with the entry in the **Price Formula** field to determine the selling price for the product or products referred to by the matrix cell.

7. In the **Price Formula** field, enter the formula for calculating the special price.

   The formula and the price basis you entered in the **PrBasis** field determine the selling price for the product or products referred to by the matrix cell.

8. In the **Effective** field, enter the date the special offer takes effect.

   By default, the system displays the current date.

9. In the **Expires** field, enter the date the special offer ends. By default, the distant date 12/31/9999 displays. The special offer remains until the expiration date, or until you remove the product from the matrix.

10. Press **Esc** to save your changes.

To delete products from the WEB price class:

1. From the **Files** > **Price Maintenance** menu, select **Quick Sell Matrix** to display the Quick Sell Matrix Maintenance screen.
2. In the **Class** field, enter **WEB**.

3. Press **Enter** to move the cursor from the header to the body of the screen.

   The matrix cells for this price class display.

4. With the cursor positioned on the product for deletion, press **Alt-Delete**.
5. When prompted, confirm the deletion by typing one of the following:

Option	Description
Y	Deletes the selected cell.
N	Aborts without deleting.
S (Suppress Prompt)	(Suppress Prompt) – Deletes the selected cell. It also suppresses the confirmation prompt if you want to delete other cells before closing the screen.

6. Press **Esc** to save your changes.

See Also:

Banner Advertising Overview

Creating Banner Ads

You can create an introduction banner, full banner, or half banner for your web advertising:

- The introduction banner ad displays in the shopping section of the main shopping cart page. After you click a product category, product, or link, the selected information replaces the banner ad. If you have multiple introduction banner ads, the web site displays them randomly when customers log in.
- Full and half banner ads display on all shopping pages. The system randomly selects the ads each time a new page displays.

Banner Type	Pixels Wide	Pixels High
Intro	470	300
Full	470	60
Half	235	60

Banner advertising is only available in Web Commerce Level 2 sites.

To use banners:

1. Using an image-editing program, create the banner ad image in a web graphic format, such as GIF or JPEG.
2. Store the image in the \\Inetpub\wwwroot\woeb\images\bannerads directory on the Internet Gateway.
3. Define how and when the banner displays using the detailed procedure below.

To control how a banner ad displays:

1. From the **System** > **Custom** > **Web Commerce** menu, select **Web Banner Ad Maint** to display the Ad Banner Maintenance screen.
2. In the **Banner ID** field, enter an ID up to 20 characters in length for the advertisement.
3. Press **F10** and select **New** or an existing ID.
4. In the **Banner Type** field, press **F10** and select **INTRO**, **FULL**, or **HALF** to indicate advertising type.
5. In the **Target Type** field, select the type of target, such as product or family, and press **Enter**.

   The system prompts you to indicate the target associated with the target type. Clicking the banner ad displays the linked target, which can be a web address, product, and so on.

If Target Type is...	Then Target prompt displays...
URL	the web site address. When prompted, enter a web address. For example: http://www.vendorcompany.com
Product	the product ID. When prompted, enter the Eclipse product ID.

If Target Type is...	Then Target prompt displays...
Family	the product family ID. When prompted, enter the product family ID.
No Target	no target. The banner displays with no links.

Use the **Expand** hot key to enter or view a target that requires more space than the **Target** field supplies.

6. In the **Start Date** and **Exp Date** fields, enter the starting and expiration dates for the banner display.
7. In the **Expire Qty** field enter the number of times the ad displays. After it reaches this number, the banner no longer displays. This field is optional.
8. In the **Weight** field, press **F10** and specify a weight between 1 and 10. A banner with a weight of 10 displays more often than a banner with a weight of 1.

   Note: When using multiple banners of the same type, the system displays them according to an algorithm that considers weight.

9. In the **Cust Type** field, press **F10** and select a customer type to limit the banner display to just those customers. For example, just Electrical customers. This field is optional.
10. In the **Image Path** field, enter the web site address for the image. For example: http://www.yourcompany.com/woeb/images/bannerads/imagename.jpg. Use the **Expand** hot key to enter or view a path that requires more space than the **Image Path** field supplies.
11. In the **Description** field, enter notes about the banner to display as a mouse-over note on the web site.

    For example, you may display an advertisement for a percent discount on a product. If you require the customer to buy a certain amount to receive the discount, enter that information in the Description box. When the customer moves the mouse cursor over the advertisement, the additional information displays.
12. If you linked the banner to a target in step 4, use the **Test** hot key to test the link.

    If the link is successful, your web browser displays the linked item. If your link is unsuccessful, the browser informs you that it cannot find the page to which you are trying to link.
13. To view detailed statistics, use the **Details** hot key. For information about the hot key or the Ad Banner Maintenance screen summary statistics, see Viewing Banner Ad Statistics.
14. Press **Esc** to save your changes.

See Also:

Banner Advertising Overview

Creating Images for Web Commerce

Viewing Banner Ad Statistics

The system tracks every time a banner advertisement displays on the web site. You can view summary statistics or detailed statistics about each banner ad. For example, view how often a banner displays, which customer viewed it, and how often that customer clicked the ad.

To view banner ad summary statistics:

1. From the **System > Custom > Web Commerce** menu, select **Web Banner Ad Maint** to display the Ad Banner Maintenance screen.
2. In the **Banner ID** field, press **F10** and select the banner for which you want to view statistics.

   The following summary statistics display for the banner:

Field	Description
Display Count	The number of times the banner ad displayed.
Click-Throughs	The number of time the customers clicked the banner ad.
On-Cart Count	The number of times the customers added the linked item to their shopping cart.

3. Press **Esc**.

To view banner ad detailed statistics:

1. From the **System > Custom > Web Commerce** menu, select **Web Banner Ad Maint** to display the Ad Banner Maintenance screen.
2. In the **Banner ID** field, press **F10** and select the banner for which you want to view statistics.
3. Use the **Details** hot key to display the Ad Banner Details screen.

   The following detail statistics display about the banner ad:

Field	Description
Ad ID	The ID used to identify the banner.
Contact	The contact name for the customer, if available.
Customer	The customer name.
Displays	The number of times the banner ad displayed.
Clicks	The number of times customers clicked the banner ad.
On Carts	The number of times customers added the linked item to their shopping cart.

4. Use the **Contact Detail** hot key to view each date and time the customer contact saw the ad and what action occurred on that date.
5. Press **Esc**.

Web Commerce Access Authorization Overview

You have precise control over who can browse your site and place orders. You can authorize customers, customer contacts, and anonymous users to place web orders.

Customers

If your customer has just one person placing web orders, assign a password in the company's Customer Maintenance record. The purchasing agent logs in using the Eclipse customer account ID and the password. See Enabling Customers for Web Commerce.

Contacts

If your customer has multiple people placing web orders, each should have a unique login ID and password. This protected access lets you track which customer contact is responsible for each web visit and order. Assign a login and password in each person's Contact Maintenance record. See Enabling Contacts for Web Commerce.

Anonymous Users

You can also set up the web site to allow anonymous users to browse and place orders. Anonymous users can search for products and fill a shopping cart without identifying themselves. When they submit an order, the system prompts them to enter the necessary account information. See Enabling Anonymous Logins.

See Also:

Setup Requirements for Web Commerce

Defining Credit Limits and Master Bid Lists for Web Commerce (Level 2)

Use credit limits and master bid lists to enhance the authorization process for contacts placing orders on your web site. Use contact credit limits, and credit decision makers to create an authorization chain for orders above a determined dollar amount, or for orders that contain products not defined on an authorized-to-buy list, or master bid list.

> **Note:** Credit limits and master bid lists apply only to Web Commerce Level 2 sites.

This topic discusses how to complete the following tasks:

- Setting contact credit limits.
- Creating master bid lists.

Setting Contact Credit Limits

You can set a dollar limit for each contact that uses your web site to place orders. The contact is able to place orders under the dollar limit without authorization from an account manager. However, any time a contact with a credit limit places an order that exceeds the limit defined in Contact Maintenance, the contact must submit the order for credit approval, and the system forwards the order information to an account manager for the contact.

Using contact credit limits requires setting the following components:

- **Enable WOE Contact Credit Limits control maintenance record** - Activates the credit limits functionality for Web Commerce.
- **Credit limit -** The dollar amount a contact is allowed to spend on an individual order before the order requires authorization to process. You can set the credit limit to $0.00 to always require authorization.
- **Credit decision maker** - A person who can be designated as another person's account manager, and can therefore authorize purchases. Someone designated as a credit decision maker can also have a credit limit.
- **Account manager** - A user who authorizes orders for the contact. If a contact has a credit limit, and that contact places an order that exceeds that credit limit, the system sends an e-mail to the account manager regarding the order. If the order also exceeds the account manager's credit limit, the system sends an e-mail to the highest manager necessary to authorize the order. The system checks the manager's manager first before proceeding to the next manager on the list.

  The e-mail contains a link to the cart the web site saved for the order when the contact submitted it for approval. The saved cart also includes any comments the user entered for the order. When an account manager actually submits an order, the system sends an e-mail that contains the order number to the contact who placed the order.

To set a contact's credit limit:

1. From the **Files** menu, select **Contact** and open the contact record.
2. Use the **WOE** hot key to display the Contact WOE Parameters screen.
3. In the **Order Credit Limit** field, enter the dollar amount the contact is allowed to spend on an individual order before the order requires authorization.

   Leave this field blank for the contact to not have a credit limit. Enter $0.00 to require authorization for all orders this contact places.
4. Press **Esc** to save the contact record and exit the screen.

To set a contact as a credit decision maker:

1. From the **Files** menu, select **Contact** and open the contact record.
2. Use the **WOE** hot key to display the Contact WOE Parameters screen.
3. In the **Credit Decision Maker** field, type **Y**.
4. Press **Esc** to save the contact record and exit the screen.

To set account managers for a contact:

1. From the **Files** menu, select **Contact** and open the contact record.
2. Use the **WOE** hot key to display the Contact WOE Parameters screen.
3. Use the **Account Managers** hot key and list the user ID of the contact's manager. Press **F10** to select from a list of account managers.
4. Press **Esc** to return to the Contact WOE Parameters screen.
5. Press **Esc** to save the contact record and exit the screen.

Creating Master Bid Lists

You can create a customer-specific list of items that any contact can purchase without requiring authorization. You can then limit contacts to purchasing only items stored in the master bid list. Set the WOE Restrict Users to Specified Price Lines control maintenance record to **Auth** to highlight any items not on the master bid list on the Review Items in Cart and Order Review pages for the contact placing the order. If the contact tries to submit an order with one or more unauthorized items, the contact can submit the order for authorization.

If a contact places an order with items not on the master bid list, the system sends an e-mail to the account manager regarding the order. If the account manager is not authorized to purchase the products on the order, the system sends an e-mail to the highest manager necessary to authorize the order. The system checks the manager's manager first before proceeding to the next manager on the list.

The e-mail contains a link to the cart the web site saved for the order when the contact submitted it for approval. When an account manager actually submits an order, the system sends an e-mail that contains the order number to the contact who placed the order.

Note: You must be either a superuser or a credit decision maker to create a master bid list.

To create a master bid list:

1. Log in to your web site and add the items to your cart that you want to add to the master bid list.
2. From the **My Cart** menu, select **Save Current Cart** to display the Save Current Cart page.
3. Select the **Master Bid List** option to save the contents of the cart as a list of items that anyone in your company is allowed to purchase without authorization by an account manager.
4. Click **Save and Continue** to save the list and continue to use the web site, or select **Save and Logoff** to save the list and end your web site session.

   The system saves the list as a normal shopping cart with the following exceptions:

   - It displays as *** Company Master Bid List *** on the Saved Carts page.
   - The system does not delete the list if a contact submits it as an order.
   - Any subsequent carts saved as a master bid list overwrite the existing list.

See Also:

Enabling Contacts for Web Commerce

Authorizing Personnel to Enter Orders

You can create a list of users your customer authorizes to place orders. The **Ordered By** field on the web shipping information page has a drop-down list of the authorized users.

Before authorizing users, create their Contact Maintenance records. See Enabling Contacts for Web Commerce.

To authorize ordering by a customer contact:

1. From the **Files** menu, select **Customer** and open a customer maintenance record.
2. Use the **Credit** hot key to display the Credit Control Parameters screen.
3. In the **Only customer's authorized personnel may place orders** field, type an asterisk (*****).
4. Use the **Authorized Personnel** hot key to display the Customer Authorization Maintenance screen.
5. In the **Authorized Personnel** column, press **F10** on a blank line. From the list of existing contacts, select a user.
6. In the **Amount** field, enter the maximum amount this user is authorized to order. Leave the field blank to authorize the user to order unlimited amounts, within the account's credit limit.
7. Repeat steps 5 and 6 to add other authorized personnel.
8. Press **Esc** until the customer record is saved and closed.

See Also:

Authorizing Web Commerce Access Overview

Requiring Purchase Order or Release Numbers on Web Orders

You can require that customers enter a purchase order or release number when placing web orders. You can also check for valid purchase order numbers that you specify, or set up a default purchase order or release number for a customer. These settings apply to all sales orders, including those from within the Eclipse system and through the web site.

An asterisk (*) next to the **Purchase Order #** or **Release #** fields on the Shipping Information page on the web site indicates a required field. If valid purchase order numbers are set for a customer, a drop-down list shows the valid numbers. If a default purchase order number is set, the **Purchase Order #** field populates with that number. In this case, the system does not check for valid numbers.

To require a purchase order or release number:

1. From the **Files** menu, select **Customer** and open a customer maintenance record.
2. In the **PO/Release # Required** field, press **F10** and select one of the following:

Code	Name	Description
P	PO#	Purchase order number is required.
R	Release#	Release number is required.
B	Both	Both purchase order and release numbers are required.
N	None	No numbers are required.

3. Press **Esc** to save your changes.

To set up a customer's default purchase order or release number:

1. From the **Files** menu, select **Customer** and open a customer maintenance record.
2. Use the **Add'l Info** hot key to open the Additional Info screen.
3. Use the **Misc Cust Info** hot key to open the Miscellaneous Customer Information screen.
4. Populate the **Default P/O Number** and **Default Release Number** fields as needed.
5. Press **Esc** to save your changes.

To specify valid purchase order numbers:

1. From the **Files** menu, select **Customer** and open a customer maintenance record.
2. Use the **Add'l Info** hot key to open the Additional Info screen.
3. Use the **Valid PO #s** hot key to open the Valid PO Numbers Selection screen.

4. Enter any of the following on the selection screen:
   - P/O numbers.
   - A string of characters followed by a right square bracket (]). For example, entering ABC] requires P/O numbers that start with the string ABC, such as ABC1001 and ABC1002.
   - A string of characters preceded by a left square bracket ([). For example, entering [ABC requires P/O numbers that end with the string ABC, such as 1001ABC and 1002ABC.
   - A string of characters preceded by a left square bracket *and* followed by a right square bracket. For example, entering [ABC] requires P/O numbers with ABC anywhere, such as 1ABC001 and AB1001C.
5. Press **Esc** to save your changes.

See Also:

Authorizing Web Commerce Access Overview

Enabling Customers for Web Commerce

You use two screens to enable a customer for web ordering. Both screens apply to various remote order entry applications, including the Web Commerce application. For details about the screen fields and hot keys, see the following topics:

- Entering Remote Order Entry Parameters
- Entering B2B/WOE Remote Order Entry Parameters

If your customers enter orders in foreign currencies, the system uses Exchange Rate Maintenance to determine the currency and the exchange rate. The table is the same place the system uses to calculate foreign currencies for order entry through the Eclipse system.

To enable a customer for web ordering:

1. From the **Files** menu, select **Customer** and open a customer maintenance record.
2. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
3. Enter the information necessary for your web site. For more information, see Setting Remote Order Entry Parameters.
4. Use the **WOE Info** hot key to display the B2B/WOE Remote Order Entry Parameters screen.
5. Enter the information necessary for your web site. For more information, see Entering B2B/WOE Remote Order Entry Parameters.
6. Press **Esc** to save your changes.

To disable a customer from web ordering:

1. From the **Files** menu, select **Customer** and open a customer maintenance record.
2. Use the **Credit** hot key to display the Credit Control Parameters screen.
3. In the **No Order Entry** field, enter an asterisk (*) to disable order entry for the account.

   Note: You can disable a bill-to account from ordering, but still allow order entry from its ship-to accounts. If the customer logs in to the web site using the bill-to account, the valid ship-to accounts display.

See Also:

Authorizing Web Commerce Access Overview

Setting Remote Order Entry Parameters

Use the Remote Order Entry Parameters screen to establish customer settings for remote order entry applications, including Remote Order Entry (ROE), Web Commerce, B2B Commerce (B2B), E-mail Order Entry (EOE), Palm Order Entry (POE), Remote Data Collection (RDC), Sales Force Automation (SFA), and Business Connect XML. Only users with the WOE.MAINT authorization key can access this screen. Some fields on this screen only apply to certain types of remote order activity.

To assign different employees to monitor different remote order types, assign the employees using Customer Remote Message Maintenance.

To identify employees for remote order entry notification:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen and display a customer record.
2. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
3. Complete the following fields, as needed:

Field	Descriptions
Log Bids For Review	Determines whether, and in what circumstances, bids display in the Remote Order Entry Review Queue or in the Business Connect XML Remote Order Entry Review Queue. Press **F10** and select one of the following: • **New Order** – Displays all orders the customer enters. • **Changes** – Displays new orders and ones that have been edited. • **Disable** – None of this customer's remote orders will be reviewed. This field applies to ROE, Business Connect XML, Web Commerce, and RDC.
Log Orders For Review	Determines whether, and in what circumstances, orders display in the Remote Order Entry Review Queue or in the Business Connect XML Remote Order Entry Review Queue. Press **F10** and select on of the following: • **New Order –** Displays all orders the customer enters. • **Changes –** Displays new orders and ones that have been edited. • **Disable** – None of this customer's remote orders will be reviewed. This field applies to ROE, Business Connect XML, Web Commerce, and RDC. **Note:** In Web Commerce, you can only change bids.
Only Log Orders With Errors	Indicates whether only orders with errors display in the Remote Order Entry Review Queue.

Field	Descriptions
Allowed Pricing Variance%	The dollar amount or percentage by which this customer's price can vary from the LIST price. This field applies to ROE, Business Connect XML, and RDC. **Note:** If you are defining allowed pricing variances for Business Connect XML customers, use the **WOE Info** hot key and then the **IDMS** hot key and set the **Use Partner Pricing** field to **Yes**.
Default User Messaged Upon Log In	User ID or message group notified when a remote user logs in to any order entry application, such as ROE or Web Commerce. Use the **Multi** hot key to assign multiple users. **Note:** This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications that the customer uses. Override the setting for individual applications using the **Remote Messaging** hot key on this screen.
Default User Messaged With New Order #	User ID or Message Group notified when any type of remote order is entered. Use the **Multi** hot key to assign multiple users. This field applies to ROE, Business Connect XML, RDC, and Web Commerce. **Note:** This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications this customer users. Override the setting for individual applications using the **Remote Messaging** hot key on this screen.
Default User Messaged With Order Changes	User ID or Message Group notified when any type of remote order is edited. Use the **Multi** hot key to assign multiple users. This field applies to ROE, Business Connect XML, RDC, and Web Commerce. **Note:** This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications this customer uses. Override the setting for individual applications using the **Remote Messaging** hot key on this screen.
Default User Messaged With Errors	User ID or Message Group responsible for monitoring remote orders that process with errors. This field applies to ROE, Business Connect XML, and Palm RDC.

Field	Descriptions
Remote Order Queue Users	User ID or Message Group responsible for monitoring this customer's orders in the Remote Order Entry Review Queue and clearing the orders for processing. Use the **Multi** hot key to assign multiple users. This field applies to ROE, Business Connect XML, RDC, and Web Commerce. **Note:** This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications this customer uses. Override the setting for individual applications using the **Remote Messaging** hot key on this screen. If you do not identify a value in this field, the system uses the user identified in the **Default User Messaged With New Order #** field, or the customer's inside salesperson, in that order.
RDC and Pocket OE Default Order Status	The default order status for Remote Data Collection (RDC) and Palm Order Entry (POE) orders.
Round to Sell Pack Qty on Remote Orders	Indicates whether the system rounds remote order quantities up to the standard package quantities. • **No** – Allows the user to order any quantity. • **Warn** – Sends the user a message when placing a remote order indicating that the quantity selected is not an even multiple of the package quantity for the product. The user still has the option to order below the package minimum. • **Force** – Sends the user a message when placing a remote order indicating that the quantity selected is not an even multiple of the package quantity for the product, and changes the quantity to the standard package quantity with no option to change it. This field applies to ROE, Business Connect XML, RDC, and Web Commerce. **Note:** Setting this parameter overrides the Round To Minimum Package Quantity In WOE control maintenance record for the customer.
Slave Printer (Blank=No ROE Printing)	The printer used for remote orders and bids. Valid values are user-defined. Leave this field blank for no printing.

<table>
<tr><th>Field</th><th>Descriptions</th></tr>
<tr><td>Display Product Availability</td><td>Indicates whether B2B, ROE, and Web Commerce customers can view the available quantity of a product entered on a bid or order. Select from one of the following options:
• Hide – Product availability information does not display.
• Show w/ Qty – The quantity available displays for each product.
• Show w/o Qty – The availability displays as In Stock or Out of Stock.
Setting this parameter overrides the settings in the Display Availability On Product Return Page In WOE and the Display Availability On Checkout Page In WOE control maintenance records for this customer. If the Display Availability On Product Return Page In WOE record is set to Show Info Icon, the Product Return page displays the more information icon if you select the Show w/ Qty or Show w/o Qty options in this field. If the above records are not set, the system uses the setting in the Display Product Availability In WOE control maintenance record.
For more information, see Defining Product Availability Display Settings.</td></tr>
<tr><td>Show Availability For Branches</td><td>The product availability detail that Web Commerce and B2B customers see on the product return list or after clicking a product description link.
• Ship Branch – Only the customer's designated shipping branch.
• Home Territory – All branches within the customer's territory.
• Authorized Branches – Only the branches the customer is authorized to access.
• All Branches – All branches in your warehouse system.
If this field is left blank, the system uses the setting in the Show Availability For Branches In WOE control maintenance record. If the control maintenance record is also blank, the system displays availability for only the ship branch.
For more information, see Defining Product Availability Display Settings.</td></tr>
<tr><td>Remote/WOE Order Entry Discount%</td><td>The discount percentage (in the format XX.X) that the customer receives for using Remote Order Entry or Web Commerce to place orders.

Note: A Web discount needs a unique account for general ledger purposes.</td></tr>
</table>

Field	Descriptions
Check Availability On Remote Orders	Indicates whether the system verifies the availability of products on orders from a remote order source when they reach the Eclipse system. • **Y** – The system places remote orders from the customer that have order quantities greater than the current availability for one or more products in the Remote Order Entry Review Queue, and changes the order status to Bid. • **N** – The system does not verify the availability of products on remote orders. **Note:** If this field is left blank, the system uses the setting in the bill-to entity of the remote order. If both the ship-to and bill-to entities are blank, the system uses the global setting in the Check Product Availability On Remote Orders control maintenance record.

4. Use the following hot keys, as needed:

To...	Use this hot key...
specify the order status settings the customer can use	**Valid Stats** The Valid Statuses screen displays. Enter all applicable shipping status codes and press **Esc**.
set up the customer for Remote Order Entry	**User Maint** The User Maintenance screen displays.
limit the user to one or more specific methods for shipping product to their site	**Ship Vias** The Valid Ship Vias screen displays. Enter all applicable ship vias and press **Esc**.
enter additional B2B and WOE settings WOE Info	**WOE Info** The B2B/WOE Remote Order Entry Parameters screen displays (not applicable for ROE).
add additional default users to message for various ROE events	**Multi** A screen with the same title as the field from which it was accessed displays. Enter all applicable users and press **Esc**.
notify different users about different ROE types	**Remote Messaging** A list of remote order entry methods displays.
prevent certain percentages of your inventory from showing in B2B inquiries	**B2B Inventory Control** The B2B Inventory control maintenance screen displays (not applicable for ROE).
identify and route incoming Ariba B2B and BCXML orders	**ECommerce IDs** The Customer Unique E-Commerce IDs screen displays (not applicable for ROE).

5. Press **Esc** to save your changes and exit the screen.

Assigning Employees to Monitor Remote Orders

Use the Customer Remote Messaging Maintenance screen to identify which employees are notified about various types of remote orders. For example, the system can send messages about e-mail orders to one person, and messages about Web orders to another.

Any settings for the individual order types override the **Default User Messaged** fields on the Remote Order Entry Parameters screen.

Before you begin, verify that a customer maintenance record exists for this customer.

To identify employees for remote order entry notification:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen and display a customer record.
2. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
3. Use the **Remote Messaging** hot key to display a list of Remote Order Entry selections.
4. Select a remote order type from the list to display the Customer Remote Message Maintenance screen.
5. Identify the users who will monitor remote orders using the following fields.

   Note: To assign multiple users to one field, either assign a message group or use the **Multi** hot key to assign several users.

Field	Description
User to be Messaged Upon Log In	User ID or Message Group notified whenever the remote user logs in.
User to be Messaged With New Order #	User ID or Message Group notified whenever the remote user enters a new remote order.
User to be Messaged With Order Changes	User ID or Message Group notified whenever the remote user changes the order.
User to be Messaged With Errors	User ID or Message Group notified whenever a remote order has one or more errors.
Remote Order Queue User	User ID or Message Group responsible for monitoring orders in the Remote Order Entry Review Queue and clearing the orders for processing.

6. Press **Esc** to save your changes and exit the screen.

See Also:

Remote Order Entry Overview

Setting Remote Order Entry Parameters

Entering B2B/WOE Remote Order Entry Parameters

Use the B2B/WOE Remote Order Entry Parameters screen to enter additional web site information for a customer. Many entries override control maintenance records. Override global settings to customize your web site for each customer.

The WOE.MAINT authorization key controls access to this screen.

This topic describes how to complete the following tasks for a customer:

- Assign B2B or WOE parameters.
- Define user list that can receive messages from this customer.
- Enter a login message.
- Specify a logoff URL.

To assign B2B or WOE parameters to a customer:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. Open a customer maintenance record.
3. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
4. Use the **WOE Info** hot key to display the B2B/WOE Remote Order Entry Parameters screen.
5. Enter the B2B/WOE remote order entry parameters according to the following descriptions:

Field	Description
B2B/Web Order Entry Password	The password a customer uses to access your web site or to make B2B inquiries. A ship-to customer can use your web site without a password if they use the bill-to customer's password. Passwords must be at least six characters.
Web Order Entry A/R Information Password	The password to view accounts receivable information. If you leave this field blank, the A/R information is not password protected. This password must be different from the password in the **B2B/Web Order Entry Password** field. The system checks both bill-to and ship-to accounts for the password. After the customer enters the password, the A/R information remains available during that web session.
Show List Price in Web Order Entry	Indicates whether to show list prices, in addition to customer's prices, for items on an order or bid. Press **F10** and select **Yes** or **No**. Leave this field blank to use the setting in the **Display List Price In WOE** control maintenance record. If the control maintenance record is blank, the default setting is **N**.

Field	Description
Force Info to be entered on the CC Page	Indicates whether credit card information is required to make an order. Press **F10** and select **Yes** or **No**. If this field is blank, the system uses the setting in the **Force Info To Be Entered On The WOE Credit Card Page** control maintenance record.
Require Ordered By	Indicates whether the user is required to enter ordered by information on the Shipping Information page. Press **F10** and select **Yes** or **No**. If this field is blank, the system uses the setting in the **Require Ordered By In WOE** control maintenance record. If you require ordered by information, and set up authorized personnel, only the authorized personnel can place an order.
Allow Creation of New Ship To Customers	Applies to Web Commerce. Indicates whether the customer can create new ship-to accounts in their customer file on the Choose a Shipping Address page in Web Commerce site. Press **F10** and select **Yes** or **No**. If this field is blank, the system uses the setting in the Allow Creation Of New Ship-To Accounts In WOE control maintenance record. For a contact, the system uses the **Allow Ship To Creation** field on the Contact WOE Parameters screen for that contact. If the contact record field is blank, then the system uses the setting in this field.
Hide Order History	Shows or hides the **Order History** web button. The button displays all previous invoices, shipping and billing information, order items, and so on. Press **F10** and select **Yes** or **No**. If this field is blank, the system uses the setting in the Hide Account Inquiry And Order History Buttons In WOE control maintenance record. For a contact, the system uses the **Hide Order History Button** field on the Contact WOE Parameters screen for that contact. If the contact record field is blank, the system uses the setting in this field.
Hide Account Inquiry Button	Shows or hides the **Account Inquiry** web button. The button displays invoice details, cash receipts, deposits, and shipping and billing information. Press **F10** and select **Yes** or **No**. If this field is blank, the system uses the setting in the Hide Account Inquiry Button In WOE control maintenance record. For a contact, the system uses the **Hide Account Inquiry Button** field on the Contact WOE Parameters screen for that contact. If the contact record field is blank, the system uses the setting in this field.
Hide Stock Products with Zero Pricing	Shows or hides stock/catalog products that have a price of zero. Press **F10** to select **Yes** or **No**. Select **Yes** to prevent orders of unpriced products. When left blank, products that have a price of zero or no price associated with them display.
Display ID	(Level 1 Web Sites only). Displays predefined product categories assigned to a display ID in Product Category Display Order.
Maximum Ship-To's Listed Per Page	The maximum number of ship-to accounts to list on a single web page.

Field	Description
Prevent Modification of Non-WOE Bids	Prevents or allows the customer contacts with web site access to modify bids entered for this customer from the Eclipse system. The default setting is No. If set to Y, the customer can only modify bids that were created by this customer using the web site. Bids created in the Eclipse system display without the **Modify Bid** button. If this field is blank, the system uses the setting in the Prevent WOE Customers From Modifying Non-WOE Bids control maintenance record. For a contact the **Prevent Modification of Non-WOE Bids** field is used. If the contact record field is blank, the system uses the setting in this field. **Note:** If the contact record setting is No, you cannot override it at the customer level. You must clear the field in the contact record for the setting in the customer record to take effect.
Display PDW Products	Applies to Web Commerce. Displays the products in the Product Data Warehouse to the customer. If this field is blank, the system uses the setting in the Display PDW Products In WOE control maintenance record.
Display Catalog Products	Applies to Web Commerce. Displays the catalog products to the customer. If this field is blank, the system uses the setting in the Display Catalog Products In WOE control maintenance record.
Enable Ship Branch Override	Applies to Web Commerce. Prevents or allows customer contacts to override the shipping branch on the Shipping Information page. • **Yes** - Allows customer contacts to override the shipping branch when placing a web order. • **No** - Prevents customer contacts from overriding the shipping branch when placing a web order. Leave this field blank to use the setting in the WOE Ship Branch Override control maintenance record. If the control maintenance record is blank and the **Enable Ship Branch** field in the Contact WOE Parameters screen is blank, the default setting is **No**.

Field	Description
Enable Ship-to Editing	Applies to Web Commerce. Prevents or allows customer contacts to edit existing ship-to information for the current web order on the Web Commerce site. • **Yes** - Allows customer contacts to edit ship-to account information. • **No** - Displays ship-to account information as view only on the web site. For a contact, the system uses the setting in the **Enable Ship-to Editing** field on the Contact WOE Parameters screen for that contact. If the contact record field is blank, then the system uses the setting in this field. If this field is blank the system uses the setting in the bill-to customer record. If that setting is also blank, the system uses the setting in the Allow Editing Of Existing Ship-To Accounts In WOE control maintenance record.

6. Press **Esc** to save your changes and save the customer record.

To define users the customer can message from the web site (Level 1 Web Sites only):

1. Complete steps 1 through 4 in "To assign B2B or WOE parameters to a customer."
2. Use the **Message Users** hot key to display the Valid Users screen.
3. Enter one user ID or message group per line that you want the customer to be able to e-mail from the web site.

   Press **F10** to select from a list of users.

   If you list one or more people, the Account Info Page displays a Message Users option. Selecting the option displays the Message Users page, where the customer can enter and send an e-mail to any user you define in the Valid Users screen.
4. Press **Esc** to save your changes.

To set a message that displays when the customer logs in to the web site:

1. Complete steps 1 through 4 in "To assign B2B or WOE parameters to a customer."
2. Use the **Login Message** hot key to display the WOE Login Message screen.
3. Type the contents of the message to display when the customer logs in to your web site.
4. Press **Esc** to save your changes.

   Note: The message you enter here also displays when Remote Order Entry users log in to Eclipse.

To enter a logoff URL:

1. Complete steps 1 through 4 in "To assign B2B or WOE parameters to a customer."
2. Use the **WOE Logoff URL** hot key.

3. At the URL prompt, enter the URL you want to display for the customer when they log off your web site. The system uses the URL you enter here instead of the URL assigned in the World Wide Web Home Page WWW URL control maintenance record when a user logs off the web site.
4. Press **Esc** to save your changes.

See Also:

Setting Remote Order Entry Parameters

Control Maintenance Records for Web Commerce

Editing Web Pages

Enabling Anonymous Logins to Web Commerce

You can set up your web site to allow anonymous users to browse the products and information available there. When this feature is enabled, the Authorization page has a **Create a New Account** button. Use two control maintenance records to customize how the button works:

- If Enable WOE Anonymous Logins is set to **Y**, clicking the button provides a generic login and password used to access your site. The anonymous user can search your product database and add items to a cart. When the user clicks **Checkout**, the Create a New Account page displays.
- If Enable WOE Anonymous Logins & Gather New Acct Info Up Front is also set to **Y**, clicking the button immediately displays the Create a New Account page. The user must create a new account to gain further access to your site.

The Create a New Account page prompts users to enter name, address, telephone, and e-mail information. The users also create login and password entries to access the site in the future. After any users with new accounts log in, or click the **Start New Order** button, they are no longer anonymous; any subsequent orders use the new account.

To create a generic login and password:

If you use the Enable WOE Anonymous Users control maintenance record to allow generic logins, create a generic customer record to provide the login and password.

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. Create a customer record for a generic customer, using a name such as WOE Anonymous Login.
3. In the **Branch Cash Acct**, **Bill To**, and **Job or Ship To** fields, enter an asterisk (*).
4. Enable the customer for Web Commerce. For example, assign a password.
5. Press **Esc** to save and exit the screen.

See Also:

Enabling Customers for Web Commerce

Authorizing Web Commerce Access Overview

Enabling and Disabling Contacts for Web Commerce

Use the Contact WOE Parameters screen to enable a customer contact for access to your web site. When a customer has more than one person using your web site, each contact should have their own web settings. Contact settings include unique passwords and access to different parts of the web site. For example, you may limit who in your company can view accounts receivable (A/R) information. Defining separate settings for each user lets you track each user's web orders and usage.

The New WOE Contact Template control maintenance record allows you to enter default settings for new contacts. These settings include basic information, such as, name, address, and phone number. The defaults entered in this record populate the Contact WOE Parameters screen each time you create a new WOE contact. You can overwrite these defaults, as needed.

To enable a customer contact:

1. From the **Files** menu, select **Contact** and open the contact record.
2. Use the **WOE** hot key to display the Contact WOE Parameters screen.
3. In the **Login** field, enter the login ID that the contact uses to access the web site or the Job Management application. Logins must be to between 6 and 40 characters in length.
4. In the **Password** field, enter the contact's password. Passwords must be between 6 and 14 characters in length.
5. Specify the following additional information as necessary:

Field	Definition
Hide Account Inquiry Button (Y/N)	Displays or hides the **Account Inquiry** web button for this contact. The button displays all open invoices, shipping and billing information, and order items. Press **F10** and select **Y** or **N**. If this field is blank, the system uses the setting in the **Hide Account Inquiry Button** field in the B2B/WOE Remote Order Entry Parameters screen for the customer account to which the contact belongs. If that field is also blank, the system uses the setting in the Hide Account Inquiry Button in WOE control maintenance record.
Hide Order History Button (Y/N)	Displays or hides the **Order History** web button for this contact. The button displays all previous invoices, shipping and billing information, and order items. Press **F10** and select **Y** or **N**. If this field is blank, the system uses the setting in the **Hide Order History Button** field in the B2B/WOE Remote Order Entry Parameters screen for the customer account to which the contact belongs. If that field is also blank, the system uses the setting in the Hide Account Inquiry And Order History Button In WOE control maintenance record.

Field	Definition
Superuser (Y/N)	Assigns superuser authority to the contact. A superuser can set up web access for other contacts linked to the same customer account. The default setting is **N**.
Allow Ship To Creation (Y/N)	Indicates whether the contact can enter a new shipping address in their associated customer file on the Choose a Shipping Address web page of the Web Commerce site.. Press **F10** and select **Yes** or **No.** If this field is blank, the system uses the setting defined in the **Allow Creation of New Ship To Customers** field on the B2B/WOE Remote Order Entry Parameters screen for the customer account to which the contact belongs. If that field is blank, the system uses the Allow Creation Of New Ship-To Accounts In WOE control maintenance record setting.
Prevent Modification of Non-WOE Bids	Prevents or allows the contact with web site access to modify bids for the customer that were created using the Eclipse system. If set to **Y**, the contact can only modify bids that were created by his or her customer using the web. Bids created in the Eclipse system display without the **Modify Bid** button. If this field is blank, the system uses the setting defined in the **Prevent Modification of Non-WOE Bids** field on the B2B/WOE Remote Order Entry Parameters screen for the customer account to which the contact belongs. If that field is blank, the system uses the Prevent Modification of Non-WOE Bids control maintenance record setting.
Credit Decision Maker	Indicates whether this contact can purchase any product up to any amount without any limits, if the Enable WOE Contact Credit Limits control maintenance record is set to **Yes**. If this contact is not a credit decision maker, assign account managers, which are credit decision makers assigned to other users, to the contact using the **Account Managers** hot key. Contact account managers have authorization access for orders the contact places that are over the credit limit or contain products not on the authorized-to-buy list for the contact. For more information about credit limits, see Defining Credit Limits and Master Bid Lists for Web Commerce.
Order Credit Limit	Indicates the dollar amount that the contact can spend in a single order without authorization from an account manager. For example, if you enter $1000.00 in this field, the contact can place orders for $1000.00 or below without having to submit the orders for approval.

Field	Definition
Enable Ship Branch Override	Applies to Web Commerce. Prevents or allows the contact to override the shipping branch on the Shipping Information page. • **Yes** - Allows the contact to override the shipping branch when placing a web order. • **No** - Prevents the contact from overriding the shipping branch when placing a web order. • **Will-Call Orders Only** - Allows the contact to override the shipping branch when placing a web order with a status of Will Call. Leave this field blank to use the setting in the setting in the **Enable Ship Branch** field of the B2B/WOE Remote Order Entry Parameters screen. If that field is blank, the system uses the setting in the Enable Ship Branch Override In WOE control maintenance record. If the control maintenance record is blank, the default setting is **No**.
Enable Ship-to Editing	Prevents or allows customer contacts to edit existing ship-to information on the current web order on the Web Commerce site. • **Yes** - Allows customer contacts to edit ship-to account information. • **No** - Displays ship-to account information as view only on the web site. If this field is blank, the system uses the setting in the **Enable Ship-to Editing** field in B2B/WOE Remote Order Entry Parameters screen for the customer ship-to account. If that field is blank the system uses the setting in the bill-to customer record. If that setting is also blank, the system uses the setting in the Allow Editing Of Existing Ship-To Accounts In WOE control maintenance record.
Enable Job Management Login	Allows a contact access to their job summary information in the Job Management application using their login and password information entered in the Login and Password fields. When a contact logs in, they are able to search for and view current and past activity to which their customer is associated including job summary status and shipment summary information available in the Job Summary page's Job Status tab. In addition, contacts who log in are able to set a user profile for viewing information and to view the online Help. Allowing customers to log in to your instance of Job Management requires configuration to your firewall to allow users from outside your VPN to access your system. Contact your sales representative or customer support for additional information regarding the setup requirements.

6. Use the **Account Managers** hot key to define the contact's account manager that authorizes orders that are above the contact's credit limit or orders that contain products the contact is not authorized to buy.

Note: You only need to define account managers if you are using credit limits and the Enable WOE Contact Credit Limits control maintenance record is set to **Yes**.

7. Use the **Web Care** hot key to set the following additional Web Care-specific options:

Field	Description
Tracker View-Only (Y/N)	Indicates whether the trackers shown in the Web Care site are view-only for this contact. Setting this field to **N** allows the contact to edit trackers on the Web Care site.
Email On Tracker Updates (Y/N)	Indicates whether to send e-mail to the contact when a user updates a Web Care tracker. The default setting is **N**.

8. Press **Esc** to save your changes and exit the screen.'

To disable a customer contact:

1. From the **Files** menu, select **Contact** and open the contact record.
2. Use the **WOE** hot key to display the Contact WOE Parameters screen.
3. In the **Login** and Password fields, delete any existing login and password so the fields are blank.
4. Press **Esc** to save your changes and exit the screen.'

See Also:

Web Commerce Access Authorization Overview

Purging Shopping Carts

Your web customers use an online shopping cart to add products to an order. When customers check out and place an order, the system purges the cart.

Customers can also save carts for later use. For example, customers may need to research a product or get a purchase order for the total amount, before checking out. In this case, the customer can save and name the carts. Other carts get abandoned when customers leave the web site without logging off.

The system purges saved shopping carts after the time indicated in the Number Of Days To Save WOE Carts control maintenance record. That purge does not clear abandoned carts. From time to time, purge leftover shopping carts from the system.

To purge abandoned shopping carts:

1. From the **System > Custom > Web Commerce** menu, select **Web Purge Carts** to display the Web Order Entry - Purge Shopping Cart screen.
2. Use the **Begin** hot key to purge the carts. A message displays when the purge is complete.
3. Press **Esc**.

To schedule abandoned shopping cart purges:

1. From the **System > Custom > Web Commerce** menu, select **Web Purge Carts** to display the Web Order Entry - Purge Shopping Cart screen.
2. Use the **Schedule** hot key to display a **Phantom Scheduler** screen.
3. Indicate what time and on what days you want to purge shopping carts.
4. Press **Esc** to save the schedule information.

See Also:

Viewing Category Item Counts

Looking Up Web Contact Information

Web Commerce Statistics Overview

Viewing Category Item Counts

Use the Web Drill Analysis screen to view item counts in your product category divisions on your web site. For example, if you have a category called Fittings that has 5000 items underneath it, including those in the subcategories, you may decide to break the Fittings category into multiple categories.

To view category item counts:

1. From the **System > Custom > Web Commerce** menu, select **Web Drill Analysis** to display the Web Drill Analysis screen.
2. In the **Report Drills with Counts Above** field, type the minimum item count number.

   For example, if you want to view categories with more than 2000 items in them, enter 2000 in this field. The report includes all categories that have more than 2000 items total in all the subcategories combined.
3. To include items that do not have an associated price in the item count, press the space bar in the **Hide Zero Price Items** field to delete the asterisk (*).
4. Use the **Print**, **Hold**, and **Opts** hot keys, as necessary.

See Also:

Purging Shopping Carts

Looking Up Web Contact Information

Web Commerce Statistics Overview

Looking Up Web Contact Information

If a user who logs in to your site with a contact login ID and not a company login ID, calls you with login problems or other questions, use the Web Password Lookup screen to identify the user's login and company information.

To look up contact information:

1. From the **System** > **Custom** > **Web Commerce** menu, select **Web Lookup Password** to display the Web Password Lookup screen.
2. In the **Login ID** field, enter the contact's login name and press **Enter**.

   The following information about the contact displays:

Field	Description
Password	The password associated with the contact login ID.
Contact ID	The contact record identification number.
First Name	The contact's first name as defined in the contact record.
Last Name	The contact's last name as defined in the contact record.
Company	The company with which the contact is associated.

3. Use the **Contact** hot key to open the contact record for this individual.
4. Use the **Entity** hot key to open the customer record with which the contact is associated, or to create a new customer record for the contact.
5. Press **Esc** to close the Web Password Lookup screen.

See Also:

Creating a Customer Record

Purging Shopping Carts

Viewing Category Item Counts

Web Commerce Statistics Overview

Web Commerce Statistics Overview

Web Commerce includes comprehensive statistical features. Monitor the statistics to analyze your web site traffic, orders, customers, and banner advertising response.

See the following topics for more information:

- Viewing Banner Ad Statistics – View summary statistics or detailed statistics about each banner ad. For example, see how often an ad displays, which customer saw it, and how often a customer clicked it. Banner advertising is only available for Web Commerce Level 2 sites.
- Viewing Web Order Entry Statistics – View a summary of site traffic and orders for the date range you specify. View traffic, sales, costs, profits, and percentages.
- Viewing Web Order Entry Statistics Detail – List customers visiting your site and their number of logins.
- Viewing Web Order Entry Order Detail – List each web order for a customer.
- Viewing Web Order Entry Contacts – List each customer contact that visited your site.

See Also:

Purging Shopping Carts

Viewing Category Item Counts

Looking Up Web Contact Information

Viewing Web Order Entry Statistics

Use the Web Order Entry Statistics screen to monitor traffic and orders on your site. The screen gives you a quick overview of site visitors, and the business they generated for you. Separate columns list orders and bids. Each column shows sales, cost of goods sold, and profit amounts.

To view web order entry statistics:

1. From the **System** > **Custom** > **Web Commerce** menu, select **Web Statistics** to display the Web Order Entry Statistics screen.
2. Use the **Start Date** and **End Date** fields to specify the date range you want to view.

   For example, if you want to view statistics for activity between September 1, 2002 and September 7, 2002, type **09/01/02** in the **Start Date** field and **09/07/02** in the **End Date** field.

   The following statistics display:

Field	Description
Logins	The total number of users that logged in to your site during the date range.
Customers	The total number of customers that logged in to your site during the date range.
New Customers	The total number of first-time customers that logged in to your site during the date range.
Orders	The total number of orders placed during the date range.
Bids	The total number of bids placed during the date range.
Sales	The total dollar amount of sales during the date range.
COGS	The total cost of goods sold during the date range.
GP$	The total gross profit dollars during the date range.
GP%	The total gross profit percentage during the date range.
Item Count	The total number of products sold during the date range.

3. To access more customer and transaction details, select a field with your cursor and use the **Detail** hot key. For example, select the **Orders** field to view order details. The Web Order Entry Statistics Detail screen opens with the statistic details.

Field	Description
Customer	The customer name.
Logins	The total number of times the customer logged in to your site during the specified date range.

4. Press **Esc**.

Viewing Web Order Entry Statistics Detail

Use the Web Order Entry Statistics Detail screen to view more information about the customers and contacts using your site, and the orders the customers place.

To view web commerce statistic details:

1. From the **System > Custom > Web Commerce** menu, select **Web Statistics**, to display the Web Order Entry Statistics screen.
2. Use the **Start Date** and **End Date** fields to specify the date range you want to view.

   For example, if you want to view statistics for activity between September 1, 2002 and September 7, 2002, type **09/01/02** in the **Start Date** field and **09/07/02** in the **End Date** field.
3. Select an entry and use the **Detail** hot key to display the Web Order Entry Statistics Detail screen.
4. Press **Esc** to return to the previous screen.

See Also:

Viewing Web Commerce Statistics

Viewing Web Order Entry Order Detail

Use the Web Order Entry Order Detail screen to list all the web orders for a customer during the date range you specify. The screen lists orders and summary sales statistics. You can view sales, cost and profit amounts, plus other information.

To view web order entry order details:

1. From the **System > Custom > Web Commerce** menu, select **Web Statistics** to display the Web Order Entry Statistics screen.
2. Use the **Start Date** and **End Date** fields to specify the date range you want to view.

   For example, if you want to view statistics for activity between September 1, 2002 and September 7, 2002, type **09/01/02** in the **Start Date** field and **09/07/02** in the **End Date** field.
3. Select an entry and use the **Detail** hot key to display the Web Order Entry Statistics Detail screen.
4. Select a customer and use the **Order Detail** hot key to display the Web Order Entry Order Detail screen.

   The following details display about an order:

Field	Description
Customer	The customer who placed the order.
Orders	The order number.
Stat	The order status. For example, B for Bid.
Sales	The total dollar sales amount.
COGS	The cost of good sold amount.
GP$	The gross profit dollars amount.
GP%	The gross profit percentage.
Item Count	The number of items ordered.

5. Use the **View** hot key to open the selected order for viewing.

   Use the **Edit** hot key to open the selected order for editing.
6. Press **Esc**.

See Also:

Viewing Web Commerce Statistics

Viewing Web Order Entry Contacts

Use the Web Commerce Contacts screen to view which customer contacts visited your site, and when. The screen lists each contact from the company who logged in, or if a company login account was used, the screen lists the company information, along with the login date and time.

To view web order entry contacts:

1. From the **System** > **Custom** > **Web Commerce** menu, select **Web Statistics** to display the Web Order Entry Statistics screen.
2. Use the **Start Date** and **End Date** fields to specify the date range you want to view.

   For example, if you want to view statistics for activity between September 1, 2002 and September 7, 2002, type **09/01/02** in the **Start Date** field and **09/07/02** in the **End Date** field.
3. Select and entry and use the **Detail** hot key to display the Web Order Entry Statistics Detail screen.
4. Select a customer and use the **Contacts** hot key to display the Contacts screen.

   The following information displays:

Field	Description
Customer	The customer name.
Name	The contact name or the company information, if not logged in as a contact.
Date	The date the contact visited your site.
Time	The time the contact visited your site.

5. Use the **Contact Maint** hot key to open the Contact Maintenance screen for the selected contact, where you can view or edit complete contact information including name, address, and telephone numbers.
6. Press **Esc**.

See Also:

Viewing Web Commerce Statistics

Index