ACTIVANT

Eclipse Using Web Commerce Level 1

Release 8.6.2 (Eterm)

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Web Commerce Overview

Use the web site to place orders over the Internet.

After you log in, you can search the product file, add items to your shopping cart, and submit your order. While shopping, you can also view product information, create your own product groups, edit shipping information, and view information about your account.

Depending on how the web site is set up for you, you may not be able to perform some of the tasks outlined in this documentation.

See these topics to get started:

- Web Commerce Access Overview
- Web Commerce Orders Workflow
- Products in Web Commerce Overview
- Shopping Carts Overview
- Account Information in Web Commerce Overview

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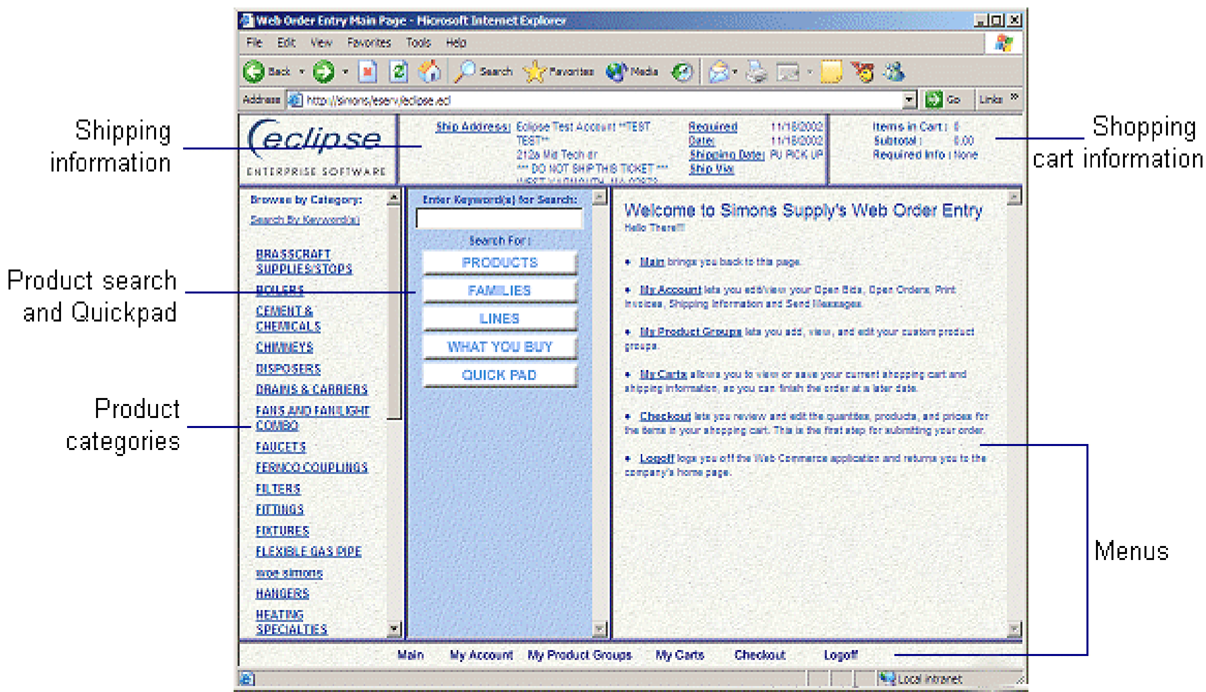
Web Commerce Window

The web site window provides access to all the web site features. Depending on how the web site is set up for you, the window may contain two or three main frames.

The web site three frame window lists product categories in the left frame, with searching options in the middle frame:



The web site two frame window provides product searching options in the left frame:

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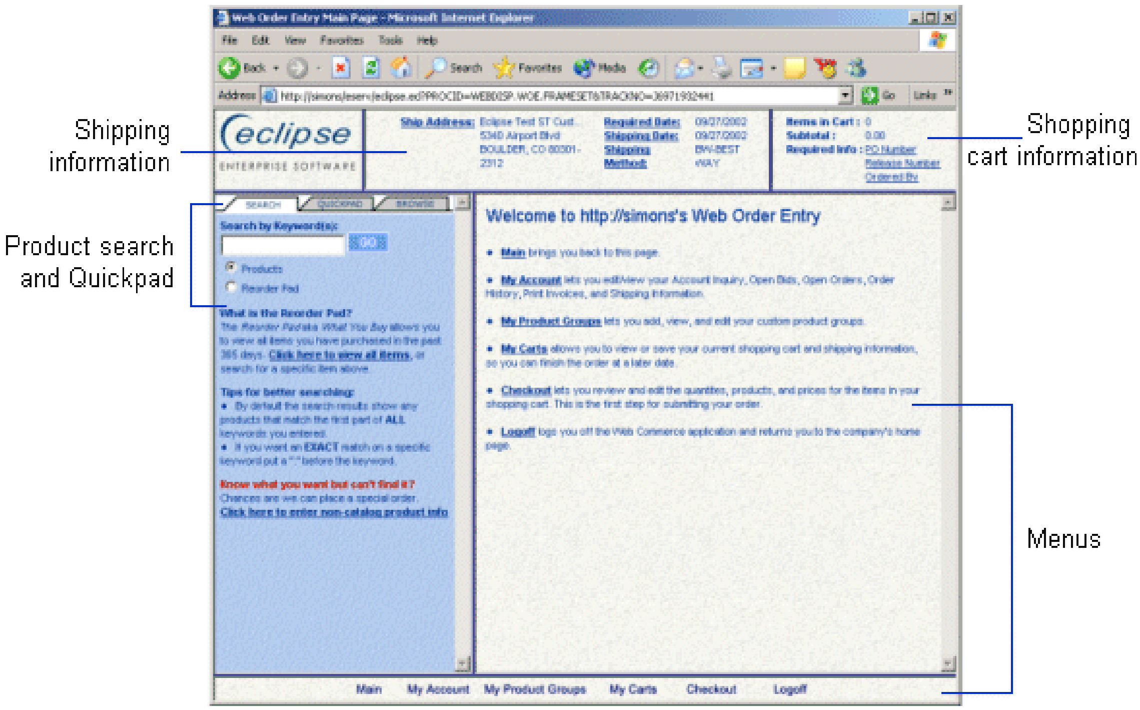

Menus

Use the menus to navigate through the different functions of the site such as viewing your account information and creating product groups.

Product Categories

Products, grouped by category. Click a category to display the products or additional subcategories.

Product Search and Quickpad

Use the product search and Quickpad to find products on the web site. Use the three tabs to search the entire product file, or to search products you have ordered in the past 365 days. Use the browsing function to browse product categories.

Shopping Cart Information

Use the shopping cart information to view a summary of the number of different items and the total amount due for the items in your shopping cart. For example, if you order 10 of one type of washer, and 20 of another type of washer, the shopping cart information indicates you have two items in your cart. However, the Subtotal field reflects the subtotal price for all 30 items.

Shipping Information

Use the shipping information section to view and edit the shipping address and to view required shipping fields.

See Also:

Web Commerce Overview

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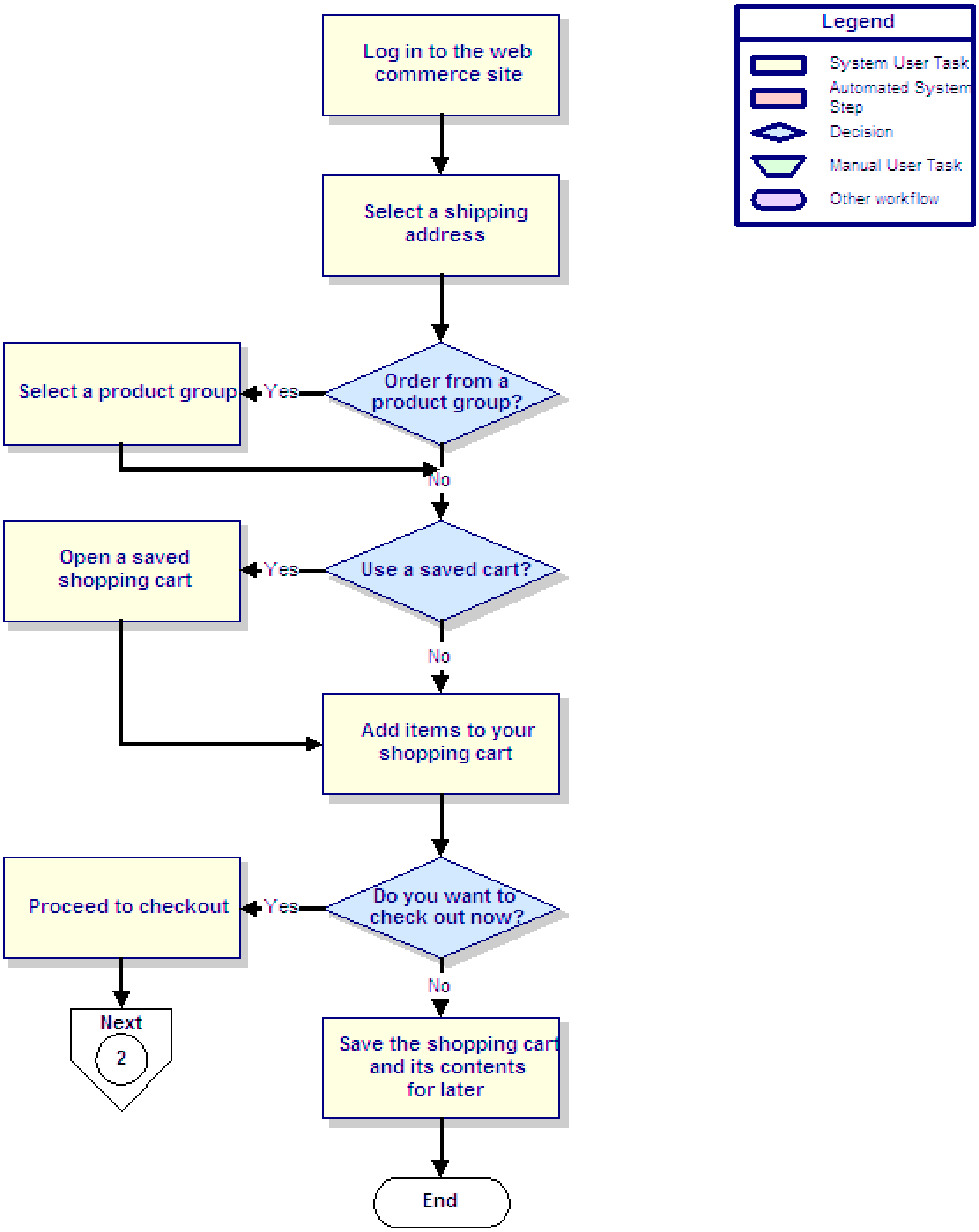
Web Commerce Orders Workflow



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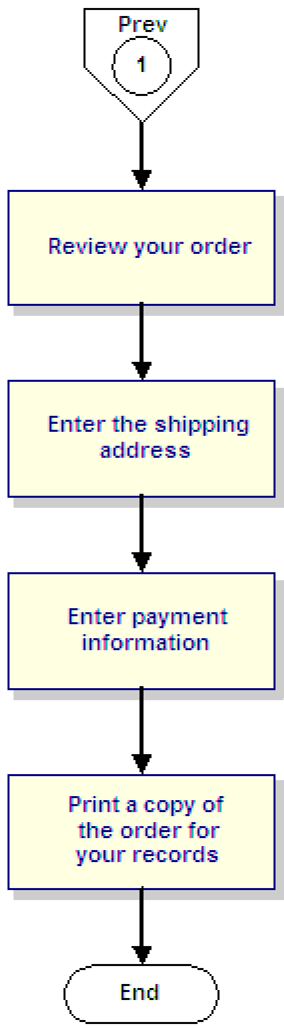
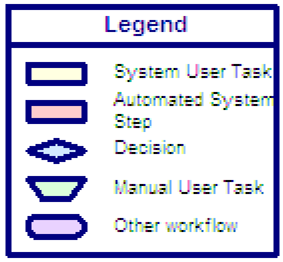
Web Commerce Orders Workflow - continued





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Web Commerce Access Overview

To access the web site, log in with a web order entry ID and a password. These login requirements protect your account information, so only those with the ID and password can access your accounts and place orders. The login features ensure privacy and security when using the web site.

If you are new to the web site, you can do one of the following:

- Immediately create a new account so you can place orders and enter account information right away, as well as secure your account with a new ID and password.
- Browse the web site. If you then want to place an order, you can create a new account before sending the order.

If you try to log in to the web site and realize you have forgotten your password, click the reminder on the authorization page and the system sends you an e-mail with your password immediately. This e-mail feature keeps your password secure, because it only sends the reminder to the e-mail address you designated when you created your account.

See Also:

Logging in to Web Commerce

Receiving Login and Password Information Through E-mail

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Logging in to Web Commerce

Your unique login ID and password allow you access to the web site. Logging in with a unique ID and password also allows you to see product groups and shopping carts you saved on past visits to the site.

If you do not have an ID and password, click **Create a New Account** on the Authorization page. Depending on how the web site is set up for you, you can:

- Immediately create a new account. Complete the brief form, including your contact information.
- Browse the site. When you check out an order, the system prompts you to create a new account.

To log in to the web site:

1. Visit the web site to display the Authorization page.
2. Enter your web order entry ID and password.

   Click **Clear** to reset the fields if you make an error.
3. To save time on your next visit, select one or both of the following options:
   - **Save my login and password -** The system automatically inserts your login entries the next time you access the site.
   - **Bypass login screen completely next time** - The system saves your login entries and automatically logs you in the next time you access the site, bypassing the Authorization page.
4. Click **Send**.

   The main shopping cart page displays.

   If your company has set up multiple ship-to accounts, the system prompts you to select an account. After you select an account, the main shopping cart page displays.

See Also:

Receiving Login and Password Information Through E-mail

Web Commerce Orders Workflow

Web Commerce Overview

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Creating Web Commerce Accounts

To place orders using the web site, you need to provide basic account information such as your name, address, telephone number, and e-mail address. To log in to the site for your specific, create a login ID and password.

Depending on how the web is set up for you, the Create a New Account page displays:

- After you click **Continue with Checkout** to place an order.
- After you click **Create a New Account** on the Authorization page.

After you have a company account, you can edit the account or add associated user accounts, if you have the appropriate authorization.

To create a new account:

1. Visit the web site to display the Authorization page.
2. Click **Create a New Account** to display the Create a New Account page.

   If the Create a New Account page does not display, it displays during the checkout process when you place your first order.
3. Enter the account information, including your name, address, and telephone number.

   An asterisk (*) next to the field name identifies a required field.
4. In the **Enter Login** field, enter a login ID for the account.
5. In the **Enter Password** field, enter a password.
6. Click **Continue** to save your information and create the account.
7. Depending on how the web site is set up for you, the system does one of the following:
   - Prompts you to enter credit card information so you can order online.
   - Prompts you to enter a shipping address.
   - Allows you to continue with your online shopping.

See Also:

Logging in to Web Commerce

Account Information in Web Commerce Overview

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Receiving Login and Password Information Through E-mail

If you forget your login ID or password, the system can e-mail it to you. If the password link is not displayed, this feature is not available.

To receive login and password information through e-mail:

1. Visit the web site to display the Authorization page.
2. Click **Forgot your ID or password? Click here.**
3. In the **E-mail address** field, enter the e-mail address for your account.

   The e-mail address you enter must exactly match the e-mail address you provided when you created your account.
4. Click **Submit**.
5. Check your e-mail account in a few moments for a response.

See Also:

Logging in to Web Commerce

Creating Web Commerce Accounts

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Logging Off Web Commerce

When you are finished using the web site, log off the site. If you have items in your current shopping cart that you have not yet ordered, the system saves the shopping cart.

Click the **Logoff** menu item to log off the web site. The system saves your current cart and displays the Logoff Successful page.

See Also:

Logging in to Web Commerce

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Shopping Cart Overview

Use an online *shopping cart* when placing web orders. An online shopping cart is similar to a traditional shopping cart. You can add or remove items from your cart as you shop. When you are finished shopping, proceed to checkout and order the items.

The following topics contain information about using your shopping cart:

- Adding Items to Shopping Carts
- Reviewing Your Shopping Cart Contents
- Saving and Retrieving Shopping Carts
- Deleting Shopping Carts
- Submitting Web Orders

See Also:

Web Commerce Orders Workflow

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Adding Items to Shopping Cart

You can add products to your shopping cart in the following ways:

- Browsing preset product categories.
- Browsing product catalogs.
- Using the Reorder Pad, a list of your previous purchases.
- Using your own custom product groups.
- Using the Quickpad to enter product numbers.
- Searching for products using keywords, product numbers, or descriptions.

See Also:

Shopping Cart Overview

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Reviewing Your Shopping Cart Contents

Your shopping cart contains all the items in your current order. Each time you add items to your shopping cart, the Review Items in Cart page displays the contents of your shopping cart. You can also view the contents of your current shopping cart using the **View Current Carts** option under **My Carts**.

Use the shopping cart information in the upper right of the web site window to view a summary of the number of different items and the total amount due for the items in your shopping cart. For example, if you order 10 of one type of washer, and 20 of another type of washer, the shopping cart information indicates you have two items in your cart. The **Subtotal** field reflects the subtotal price for all 30 items.

Review your shopping cart contents to ensure the items and quantities are what you want to order. You can change the quantity, and for some products, the unit of measure.

While reviewing the cart contents, you can do any of the following:

- Change an order quantity.
- Remove an item.
- Add additional items.
- Order the items in your cart.
- Save the cart.
- Delete the cart.

To view your shopping cart:

1. Display your shopping cart in any of the following ways:
    - Click the **Checkout** menu.
    - From **My Carts**, click **View Saved Carts** to view and select previously saved shopping carts.
    - From **My Carts**, click the **View Current Cart** to view the items in your current shopping cart.
    - Add an item to your shopping cart.

To view saved carts:

1. From **My Carts**, click **View Saved Carts** to display your saved shopping carts.

To change an item's order quantity in your shopping cart:

1. Display the Review Items in Cart page.
2. In the **Qty** field, enter the number of each item you want to order.

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3. Update the **Unit of Measure** if necessary.

   For example, change from ea (each) to cs (case) quantity. Some products have a fixed unit of measure that you cannot change.

4. Click **Update**.

   The **Ext Price** and **Subtotal** fields update to reflect the new quantity.

To remove an item from your cart:

1. Display the Review Items in Cart page.
2. In the **Qty** field of the item you want to remove, type **0**.
3. Click **Update**.

   The item no longer displays in your shopping cart, and the **Subtotal** field updates to reflect the removal of the item.

See Also:

Shopping Cart Overview

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Saving and Retrieving Shopping Carts

You can fill your shopping cart with items, then save the cart to review later.

To save a shopping cart:

1. From **My Carts**, select **Save Current Cart** to display the Save Current Cart page.

   The Save Current Cart page displays the contents of your shopping cart.

2. In the **Title** field, enter a descriptive name that identifies your cart.
3. Review the contents of the cart. Check the quantity, item description, and price information.
4. Optionally, enter any comments regarding the cart in the **Comments** field.
5. Do one of the following:
   - Click **Save and Continue** to save the cart and return to the main web page. You can continue shopping, or fill another shopping cart.
   - Click **Save and Logoff** to save the cart and exit the web site.

To retrieve a previously saved shopping cart:

1. From **My Carts**, select **View Saved Carts** to display all the saved carts for your account.
2. Select a cart, and click **Go** next to the cart.

   The Review Items in Cart page displays, listing the contents of the shopping cart.

   Depending on how the web site is set up for you, selecting a saved shopping cart may copy the items from the saved cart to your current shopping cart, and delete the saved version. If you need to save cart contents again, save the cart as described above.

See Also:

Shopping Cart Overview

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Deleting Saved Shopping Carts

You can delete a saved shopping cart. For information about deleting *items* from a cart, see Reviewing Your Shopping Cart Contents.

To delete a saved cart:

1. From **My Carts**, select **View Saved Carts** to display a list of all your saved shopping carts.
2. Select the **Select Cart** check box for each cart you want to delete.

   You can delete multiple carts at one time.
3. Review the selected carts carefully to ensure you are not deleting a cart you need.
4. Click **Delete Selected Carts** at the bottom of the cart list.

   The system removes the cart from your Saved Carts list.

See Also:

Shopping Cart Overview

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Products in Web Commerce Overview

Use the web site to access product information. Because numerous products are available, you can browse a list to find the products you need. You can view additional product information details. You can also request a special product that you cannot find, or create your own groups of products to speed your order process.

See these topics for more information:

- Navigating the Product List
- Requesting Special Products
- Creating and Viewing Custom Part Numbers
- Working with Product Groups

See Also:

Web Commerce Orders Workflow

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Navigating the Product List in Web Commerce

Each method of searching the product file displays a list of products that meet your search criteria.

The information above the product list shows how many items are in the list, which ones are currently displayed, and which page of the list you are currently viewing. Click a page number to view the list on that page.

The product listing shows you how many of each item are currently available and the price for each item. Use the buttons above and below the list to add items to a product group, add items to your shopping cart, or check out. Depending on how the web site is set up for you, moving your mouse over the product description may displays reminder messages set for the product.

See Also:

Products in Web Commerce Overview

Adding Items to Shopping Carts

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Viewing Product Details in Web Commerce

From the product list, you can view a detailed description of the product if it is available. Product details include the product part number, a full description, retail price, your price, quantity ordered, quantity available, product reminder message, and a product image, if available.

To view product details:

1. In the product list, click the product description to display the Additional Product Information page.

   The following product details display.

   Note: Depending on how the web site is set up for you, your product details page may display all or some of the details listed.

Product Detail	Description
Description	The complete product description.
Retail Price	The suggested retail price for the product.
Your Price	The price you will pay for the product.
Total Available	The total quantity of product available for purchasing.
Quantity Ordered	The amount of the item to add to your product group or your shopping cart.
Custom Part Number	Custom names or part numbers for the product, if you have defined any. See Using Custom Part Numbers.
Availability by Branch	The total quantity of the item available at each company branch.
Status	The status of the product in the warehouse, either stock or nonstock.

See Also:

Products in Web Commerce Overview

Creating and Viewing Custom Part Numbers in Web Commerce

Adding Items to Shopping Carts

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Requesting Special Products in Web Commerce

If you cannot find the item you are looking for, use the web site to place a special request.

To request a special product:

1. Click the **Search** tab in the Product Search frame to display the **Search** field.
2. Click the **Click here to enter non-catalog product info** link to display the Enter New Product Info page.
3. In the fields provided, enter as much information about the item as possible. An asterisk (*) next to a field name identifies a required field.
4. Click **Continue** to send your request.

   You receive an e-mail when the buyer locates the item, or as soon as additional information is available.

See Also:

Products in Web Commerce Overview

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Creating and Viewing Custom Part Numbers in Web Commerce

You can create and use your own numbers or names for products. Instead of searching or browsing through long product lists, you can order by using your own unique part number. For example, order by entering that number in the Quickpad. You can also use your custom part numbers in keyword searches.

Web Commerce saves your customer-specific part numbers so you can use these numbers at any time on the web site or in our store.

Your custom part number displays with the line-item description on the sales order.

To create or view a custom part number:

1. View a product's detailed description.
2. Click the **View Custom Part Numbers and Availability** link to display the custom part number information.
3. In the **Enter a New Custom Part Number** field, enter the unique number or name for the product.

   For example, if you regularly order the B13-363 999015-04 SEAL REP KIT, name this product Seal Repair Kit 1 for easier reference.
4. Click **Add**.

   The system adds the custom part number to the product.

See Also:

Products in Web Commerce Overview

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Working with Product Groups in Web Commerce

Use the web site to create your own product groupings. If you regularly buy certain products, alone or together, add them into a custom product group to speed your ordering by eliminating repetitive searches.

You can create, edit, or delete product groups at any time. Depending on how the web site is set for you, you may also view product groups assigned to associated bill-to and ship-to customers.

To create a product group:

1. From **My Product Groups**, click **Create A New Product Group** and click **Continue**.

   The My Product Group NEW page displays.

2. Enter a new product group name, and click **Go**.

   The My Product Group page displays with a list of all your product groups.

To add items to a product group:

1. Search for products.
2. After you find the items that you want to add, select the check box next to each item, indicate the quantity to add, and click **Add to Product Group**.

   The My Product Groups page displays, containing a list of your current product groups.

3. Select the group to which you want to add the products and click **Continue**.

   The products you selected display in the product group.

To add product group items to your shopping cart:

1. From **My Product Groups**, select the product group you want to add and click **Continue.**
2. Specify which items you want to order in either of the following ways:
   - Enter the quantity in the **Quantity** field.
   - Use the **Select Item** check box to include one of each selected item.
3. Optionally, use the **Comments** field to enter order remarks.
4. Click **Add Items to Cart**.

   A page displays to review your shopping cart.

To remove items from a product group:

1. From **My Product Groups**, select the product group from which you want to remove items and click **Continue**.
2. Use the **Select Item** checkbox to select each item you want to remove from the group.

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3. Click **Remove Items**.

   A revised list of the products displays for your review.

To delete a product group:

1. From **My Product Groups**, select the product group you want to remove.
2. Click **Delete**.

   A revised list of your product groups displays for your review.

To view product groups for related customers:

1. From **My Product Groups**, select **View Product Groups for Related Customers**.
2. Click **Continue**.

   Your product groups and the product groups assigned to associated bill-to and ship-to customers display. To return to viewing only your product groups, select **Limit Product Groups to This Customer** and click **Continue**.

See Also:

Products in Web Commerce Overview

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Ordering by Searching for Products in Web Commerce

You can order products by entering various search criteria. You can also order products using the Quickpad, browsing product categories, or searching product catalogs.

This topic discusses searching for products:

- Using the three frame window.
- Using the two frame window.

To search for products using the three frame window:

1. From the Browse by Category frame, click **Search by Keyword(s)** to display the **Search** field in the middle frame.
2. In the **Search** field, enter any of the following:
    - Keywords.
    - A period (.) followed by the product ID, if the distributor provides it to you.
    - Custom part numbers.
    - Manufacturer names.
    - Parts of the product description.

    Note: You can enter multiple search criteria in the search field separated by spaces. The search results show any products that match the first part of *all* keywords you enter. If you want an exact match on a specific keyword, type a period (.) after the keyword.
3. Click one of the following buttons to select the type of products you want to search:
    - **Products** - Searches all the products contained in the product file.
    - **Catalog** - Searches the catalogs from which the distributor can order. Depending on how the web site is set up for you, the catalog search option may not be available.
    - **Families** - Searches product family names.
    - **Lines** - Searches price line names.
    - **What You Buy** - Searches the products you have purchased in the last 365 days.

    The products matching your search criteria display.
4. Navigate the product list to find the products you want to order.

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5. Select products to add to your shopping cart by checking the **Select Item** check box or by entering an amount in the **Quantity** field.
6. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

To search for products using the two frame window:

1. Click the **Search** tab in the Product Search frame to display the **Search** field.
2. In the **Search** field, enter any of the following search criteria:
   - Keywords.
   - A period (.) followed by the product ID, if the distributor provides it to you.
   - Custom part numbers.
   - Manufacturer names.
   - Parts of the product description.

   Note: You can enter multiple search criteria in the search field separated by spaces. The search results show any products that match the first part of *all* keywords you enter. If you want an exact match on a specific keyword, type a period (.) after the keyword.

3. Select one of the following radio buttons to refine your search:
   - **Products** - Searches the entire product file.
   - **Catalog** - Searches the catalogs from which the distributor can order. Depending on how the web site is set up for you, the catalog search option may not be available.
   - **Reorder Pad** - Searches products you have ordered in the past 365 days.
4. Click **Go**.

   The results of your search display.
5. Navigate the product list to find the products you want to order.
6. Select products to add to your shopping cart by checking the **Select Item** check box or by entering an amount in the **Quantity** field.
7. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

See Also:

Adding Items to Shopping Carts

Creating and Viewing Custom Part Numbers in Web Commerce

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Ordering From Product Catalogs in Web Commerce

Depending on how the web site is set up for you, you may be able to search and order from product catalogs from which the distributor can order.

This topic discusses ordering products from product catalogs:

- Using the three frame window.
- Using the two frame window.

To order from product catalogs using the three frame window:

1. From the Browse by Category frame, click **Search by Keyword(s)** to display the **Search** field in the middle frame.
2. View catalog products by doing either of the following:

To...	Do this...
Search for an item	enter the item's product ID, custom part number, keyword, or part of the product description in the **Search** field. Click **Catalog Search.**
View all the product catalogs	click **Catalog Search** without entering any search criteria in the **Search** field.

3. Click the catalog name to view the products in the catalog.

   The products available in that catalog display.
4. Navigate the product list to find the products you want to order.
5. Select products to add to your shopping cart by checking the **Select Item** check box or by entering an amount in the **Quantity** field.
6. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

To order from product catalogs using the two frame window:

1. Click the **Search** tab in the Product Search frame to display the **Search** field.
2. View catalog products by doing either of the following:

To...	Do this...
Search for an item	enter the item's product ID, custom part number, keyword, or part of the product description in the **Search** field. Select the **Catalog** radio button and click **Go.**
View all the product catalogs	select the **Catalog** radio button and click **Go** without entering any search criteria in the **Search** field.

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3. Click the catalog name to view the products in the catalog.

   The products available in that catalog display.

4. Navigate the product list to find the products you want to order.
5. Select products to add to your shopping cart by checking the **Select Item** check box or by entering an amount in the **Quantity** field.
6. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

See Also:

Adding Items to Shopping Carts

Creating and Viewing Custom Part Numbers in Web Commerce

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Ordering From the Reorder Pad and What You Buy in Web Commerce

Repeat customers can add items to shopping carts using the Reorder Pad or What You Buy, which lists the products you purchased in the last 365 days.

This topic discusses how to order products you purchased in the last 365 days:

- Using the three frame window.
- Using the two frame window.

To order from What You Buy using the three frame window:

1. From the Browse by Category frame, click **Search by Keyword(s)** to display the searching options in the middle frame.
2. View What You Buy items by doing either of the following:

To...	Do this...
Search for an item	enter the item's product ID, custom part number, keyword, or part of the product description in the **Search** field and click **What You Buy.**
View all the products in What You Buy	click **What You Buy** without entering any search criteria in the **Search** field.

   The products display in the product list.

3. Navigate the product list to find the products you want to order.
4. Select products to add to your shopping cart by checking the **Select Item** check box or by entering an amount in the **Quantity** field.
5. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

To order from the Reorder Pad using the two frame window:

1. Click the **Search** tab in the Product Search frame to display the search options.
2. View Reorder Pad products by doing either of the following:

To...	Do this...
Search for an item	enter the item's product ID, custom part number, keyword, or part of the product description in the **Search** field. Select the **Reorder Pad** radio button and click **Go**.
View all the products in the Reorder Pad	click the **Click here to view all items** link under the What is the Reorder Pad? description.

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The products display in the product list.

3. Navigate the product list to find the products you want to order.
4. Select products to add to your shopping cart by checking the **Select Item** check box or by entering an amount in the **Quantity** field.
5. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

See Also:

Adding Items to Shopping Carts

Creating and Viewing Custom Part Numbers in Web Commerce

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Ordering From the Quickpad in Web Commerce

Use the Quickpad if you know a product's number or description. Use the Quickpad to order items without browsing categories or lists and to order multiple known items at once.

This topic discusses how to order products using the Quickpad:

- Using the three frame window.
- Using the two frame window.

To order from the Quickpad using the three frame window:

1. From the Browse by Category frame, click **Search By Keywords** to display the search information in the middle frame.
2. Click **Quick Pad** to display the Quickpad form.
3. In the search fields, enter any of the following:
   - A period (.) followed by the product ID number.
   - Your custom part number.
   - A product keyword. By default the search results show any products that match the first part of *all* keywords you entered. If you want an exact match on a specific keyword, type a period (.) after the keyword.
   - Any portion of the product description.
4. When you finish adding items, click **Continue**.

   A summary page displays with the results of your Quickpad order:

If the product has...	Then...
An exact match	the system adds one of the product to your shopping cart. Click the **Click here to view the item** link to view the product description.
Multiple matches	click the **Click here to select from the list of matched products** link to display a product list of those items that matched your Quickpad entry. Select the item you want to order.
Too many matches	refine your search by entering more specific information in the Quickpad fields provided.
No match	click the link to return to the Quickpad to retry your search using different search criteria.

To order from the Quickpad using the two frame window:

1. Click the **Quickpad** tab in the Product Search frame to display the Quickpad.
2. Continue with step 2 above.

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To change the quantity of items added to your cart:

When using the Quickpad to order products, the system adds one of each product it finds an exact match for to your shopping cart. To change the quantity of the item in your shopping cart, view your shopping cart and update the quantity for each item.

See Also:

Adding Items to Shopping Carts

Reviewing Your Shopping Cart Contents

Creating and Viewing Custom Part Numbers in Web Commerce

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Ordering From Product Categories in Web Commerce

The web site groups products into *categories* and *subcategories.*

This topic discusses ordering from product categories:

- Using the three frame window.
- Using the two frame window.

To order from product categories using the three frame window:

1. From the Browse by Category frame, click a category to display its subcategories in the middle frame.

   If the category does not contain subcategories, the list of products in that category display in the product list on the right side of the window.
2. Click a subcategory to display its products or subcategories.
3. Navigate the list of products to find the products you want to order.
4. Select products to add to your shopping cart by selecting the **Select Item** check box or by entering the amount of the product you want to order in the **Quantity** field.
5. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

To order from product categories using the two frame window:

1. Click the **Browse** tab in the Product Search frame to display a product category list.
2. Click the category to display its subcategories.

   If the category does not contain subcategories, the list of products in that category display in the product list on the right side of the web site window.
3. Click a subcategory to display its products or subcategories.
4. Navigate the list of products to find the products you want to order.
5. Select products to add to your shopping cart by selecting the **Select Item** check box or by entering the amount of the product you want to order in the **Quantity** field.
6. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

See Also:

Adding Items to Shopping Carts

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Ordering From Product Groups in Web Commerce

Use the web site to create your own groups of products for quick access to the products you order most often. Product groups display as a list, without thumbnail images. Use the following procedure for both the two and the three frame window.

To order from a product group:

1. From **My Product Groups**, select a product group to display the list of products and their suggested order quantities.
2. Navigate the product list to find the products you want to order.
3. For each product you are ordering, enter the number you want to order in the **Quantity** field and click the **Select Item check box** for that item.
4. Click **Add Items to Cart**.

   The Shopping Cart Information in the upper right portion of the window updates to indicate the number of different products you have in your shopping cart.

See Also:

Adding Items to Shopping Carts

Working with Product Groups in Web Commerce

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Submitting Web Orders

After reviewing your shopping cart, check out and submit your order.

To check out and submit your order:

1. On the Review Items in Cart page, click **Continue With Checkout** to display the Shipping Information page.
2. Ensure all the required shipping information fields indicated with an asterisk (*) are filled in and all the information is correct. To change to a different ship-to account, if applicable, select a new account from the **Ship-To Name** drop-down list.

   Note: Depending on how the web site is set up for you, you may not have edit capabilities for the ship-to address information. You may be able to select a different shipping branch in the **Branch** field. For example, if you plan to pick up an order from a branch that you typically do not order from, select that branch in the **Branch** field.

3. Click **Continue with Checkout** to display the Credit Card Info page, if your account allows credit card payments.

   If the system finds errors in the shipping information you entered, the Shipping Information page re-displays with the errors listed at the top of the page. If the zip code you enter does not match the city or the state you entered, the City, State, and Zip Code Do Not Match page displays. Either select a valid city and state that matches the zip code from the drop-down list, or re-enter the city, state, and zip code in the fields provided. Click **Continue** to display the Shipping Information page with the correct information. If any of the three fields on the page are blank, the system uses the selected city and state from the drop-down list.

4. Do one of the following:

   - To pay with a credit card, select a credit card or enter new credit card information and click **Continue with Checkout**.
   - To charge the order balance to your account *without* paying with a credit card, click **Pay Without Credit Card**.

   Note: Depending on how the web site is set up for you, you may not be able to place your order without a credit card.

   After the system processes the shipping and credit card information, it processes your order and displays your order confirmation.

   If your order is shipping from multiple branches or in multiple shipments, the **Ship Date**, **Ship Via**, and **Order Status** fields on the Order Submitted page display as **Multiple Shipments**. Click the **Multiple Shipments** link to view information separately for each generation that makes up the entire order.

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5. Click the **Click here for a printer friendly version of this page** link to display a print-ready copy of your order.
6. Print a copy of the submitted order receipt and keep it for your records.

   Note: Depending on your web site settings, items that are not in stock may be identified on your receipt by *CALL* in the **Price** field. Call the distributor for price and availability information.

See Also:

Web Commerce Orders Workflow

Shopping Cart Overview

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Selecting Shipping Addresses for Web Orders

If your company has more than one shipping address, the system prompts you to select which ship-to account to use when placing orders. Users with the proper authorization can also create new shipping addresses.

Select, edit, or create a shipping address while logging in to the web site. If your company has multiple addresses, the Choose a Shipping Address page displays after you submit your login and password. You can select or search for an address. You can search by name, address, or other criteria available in the search drop-down list.

After you select a shipping address, you can begin shopping. You can also select an address later while browsing or checking out.

To select a shipping address when logging in:

1. Visit the web site to display the Authorization page.
2. Enter your web order entry ID and password and click **Send**.

   If your company has multiple ship-to accounts, the Choose a Shipping Address page displays and lists each ship-to account name and address associated with your company.
3. Click **Use this address** next to the address to select it.

   The main shopping page displays.

To search for a shipping address:

1. Visit the web site to display the Authorization page.
2. Enter your web order entry ID and password and click **Send**.

   If your company has multiple ship-to accounts, the Choose a Shipping Address page displays and lists each ship-to account name and address associated with your company.
3. Enter your search criteria in the provided field and select the type of data you entered from the adjacent drop-down list.

   For example, if you are looking for a shipping address and know the zip code, type the zip code in the field and select **Zip** from the drop-down list.
4. Click **Search**.

   All the shipping addresses that match your search criteria display.
5. Click **Continue** next to the address to select it.

   The main shopping page displays.

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▶To create and save a new shipping address:

Note: Depending on how the web site is set up for you, the **Enter New Address** option may not be available.

1. Visit the web site to display the Authorization page.
2. Enter your web order entry ID and password and click **Send**.

   If your company has multiple ship-to accounts, the Choose a Shipping Address page displays and lists each ship-to account name and address associated with your company.
3. Click **Enter New Address** to display the Edit Shipping Address page.
4. Enter the address information in the provided fields. An asterisk (*) next to a field name identifies a required field.
5. Click **Continue.**

▶To select a shipping address later:

1. From **My Account**, select **Shipping Information** to display the Choose a Shipping Address page.

   The Choose a Shipping Address page also displays automatically during the checkout process.
2. Select a different account from the **Ship-To Name** drop-down list.
3. Click **Continue** to continue with the shopping process.

See Also:

Account Information in Web Commerce Overview

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Entering Credit Card Information for Web Orders

The web site is set up to allow credit card orders. During the checkout process, the Credit Card Info page displays. This page lists credit cards you have on file, and has an option to enter new credit card information. Credit cards you have on file that are past their expiration date are not listed.

If your company has a current trade charge account, you can submit a web order without using a credit card. Otherwise, you may be required to enter credit card information.

This topic discusses how to pay using the following options:

- With an existing credit card.
- With a new credit card.
- Without a credit card.

To pay for your order with an existing credit card:

1. Proceed to checkout.
2. Select a credit card.
3. Click **Continue with Checkout**.

To pay for your order with a new credit card:

1. Proceed to checkout.
2. Select the **Enter a new credit card** radio button.
3. From the **Payment Method** drop-down list, select the credit card type.
4. Fill in the **Credit Card Number**, **Expiration Date**, and **Name on Card** fields exactly as they appear on your credit card.
5. Specify the billing address used by your credit card company by either filling in the **Address**, **City**, **State**, and **Zip** fields or clicking the check box to use the shipping address.
6. Click **Continue with Checkout.**

   The system uses this credit card for the current order. The card displays in the list of existing credit cards when placing future orders.

To pay for your order without a credit card:

1. Proceed to checkout.
2. Click **Pay without Credit Card**.

   The system submits the order and bills the order to your current trade charge account without a credit card payment.

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Note: This option is not available if you are required to enter credit card information when placing orders.

See Also:

Web Commerce Orders Workflow

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Account Information in Web Commerce Overview

Web commerce gives you instant access to your account information. You can view all your open orders, open bids, overall order history, and view transaction details. You can also copy items from a previous order and add them to your current shopping cart. You can also view and print invoices.

Edit user account information, or create new user accounts as needed. For example, change your login information frequently for security. You can also enter a different shipping address or credit card for an order.

If you do not have authorization to edit or create users, the Edit Users option is not available.

See these topics for additional information about managing your account information:

- Making Account Inquiries
- Editing or Creating Users
- Viewing Open Orders and Open Bids
- Viewing Order History
- Viewing and Printing Invoices
- Editing Shipping Information

The Account Inquiry and Order History options are only available if you are authorized to view accounts receivable information. You may also need to enter a password.

See Also:

Web Commerce Orders Workflow

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Making Account Inquiries in Web Commerce

Use the Account Inquiry page to view your account balance and transaction summary. This page displays all open transactions for your account as of the specified date. You can also search for a transaction by entering a reference number, purchase order number, or release number.

The Account Inquiry option is only available if you are authorized to view accounts receivable information. You may also need to enter a password.

While on the Account Inquiry page, you can do the following:

- Make an account inquiry.
- View a listed transaction's details.
- Display account information that existed on another date.
- Search for a transaction.

To make an account inquiry:

1. From **My Account**, select **Account Inquiry** to display the Account Inquiry page.
2. If prompted, enter your password and click **Send**.

   The Account Inquiry page displays the following information about your account:

Field	Definition
Future	The part of the balance that is due but has not yet appeared on a statement.
Current	The part of the balance that has been billed and is due in the current period.
31-60	The part of the balance that is between 31 and 60 days overdue.
61-90	The part of the balance that is between 61 and 90 days overdue.
91-120	The part of the balance that is between 91 and 120 days overdue.
Over 120	The part of the balance that is over 120 days overdue.
Total	The total balance due.
Deposits	The total of all deposits made against open orders.
Orders	The dollar value of material that has been ordered but not yet shipped.
MTD Sales	The month-to-date sales total.
YTD Sales	The year-to-date sales total.
6-Mo Average	The average balance due over the past six months.
6-Mo High	The highest total balance due over the past six months.
Payment Days	The average of the number of weighted days to pay since the last time there was a zero balance.
Contact	The name of the person to contact regarding the account.
Phone	The telephone number of the contact person for the account

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Field	Definition
Terms	The payment terms.
Credit Limit	The credit limit.
Available	The difference between the **Credit Limit** and **Total** balance due.
Last Sale	The date of the last sale.
Last Payment	The amount of the last payment. This field only reflects actual cash receipts, not zero dollar cash receipts that you enter to adjust an account.

The Account Inquiry page also displays the following details about invoices that affect the balance due for an account:

Field	Definition
Reference #	The sales order number, check number, or cash payment number of the transaction.
Br	The branch that receives credit for the transaction.
Date	The transaction posting date.
Amount	The transaction amount.
Payment	The amount applied to the original transaction.
Pmt Date	The date the payment was made.
Balance	The remaining balance for the transaction.
Age	The aging category to which the transaction belongs.

To view a listed transaction's details:

1. Make an account inquiry.
2. In the **Reference #** column, click a transaction number.

   A page displays the details of the transaction. For example, clicking a sales order displays its Invoice Number page, while clicking a payment displays its View Deposits page.

To display account information that existed on another date:

1. Make an account inquiry.
2. In the **As of Date** field, enter a date.
3. Click **Go**.

To search for a transaction:

1. Make an account inquiry.
2. In the search field at the bottom of the orders table, enter one of the following:
   - Reference number, such as a sales order number or a cash receipt number.
   - Purchase order number.
   - Release number.

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3. Click **Go**.
    - If one item is found, it opens.
    - If more than one item is found, a list displays. Click a listed item to display it.

See Also:

Managing Your Account Information Overview

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Creating and Editing Users in Web Commerce

If your company has more than one person using the web site, we recommend that each person have their own user account. Having separate accounts for each user makes it easier to track web transactions. If employees leave your company, you can delete their accounts. You can edit your user account information at any time. For example, you can edit your account to change a telephone number or your login information. You can also create new user accounts.

If no one from your company has used the web site, first create a company account. See Creating a New Account.

To edit or create a user:

1. From **My Account**, select **Edit Users** to display a list of users for the account.
2. In the list, do one of the following:
    - Click **New User** to display a blank Edit User page.
    - Click the name of a user to display that user's information.
3. Edit or enter the information as needed. An asterisk (*) next to a field name indicates a required field.
4. Select **Use Company Address** to populate the address fields using your company address information. Leave the check box blank to enter an alternate address.
5. Click **Submit** to save the new or edited user account.

To delete a user:

1. From **My Account**, select **Edit Users** to display a list of users for the account.
2. Click the name of a user to display the user information.
3. Click **Delete** to permanently remove the user account.
4. At the prompt, confirm the deletion.

See Also:

Managing Your Account Information Overview

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Viewing Open Orders and Open Bids in Web Commerce

Use the Open Orders page to view a list of all your open orders and open bids. You can also search for a transaction by reference number, purchase order number, or release number.

The Open Orders page also displays open bids, indicated by a Submitted status. Most web site orders enter the system as bids. After review and processing approval, the bids change to orders and display an In-Process status. A bid's pricing is only good for a specified amount of time before it expires. If a bid is not expired, you keep the bid's pricing when you copy items from the bid to your shopping cart. You may encounter price changes when copying items from an expired bid to your shopping cart.

When on the Open Orders page, you can do any of the following:

- View your account's open orders and order generations.
- Search for a transaction.
- View order details.
- Copy items from a past order to your current order.
- Copy items to a product group.
- Modify an existing bid.
- Copy items from a bid to your current order.

Depending on how the web site is set up for you, if no items are found for the active ship-to account, the Open Orders page displays information for the bill-to account. Click the link at the top of the page to return to the ship-to account's open orders.

To view your account's open orders and open bids:

1. From **My Account**, select **Open Orders** to display the Open Orders page.

   The following information displays for each open order and bid:

Field	Description
Order Number	The transaction number, such as S1111111.1.
Status	The status of the order: • **Submitted** - The order is an open bid. • **In-Process** - The order is open. • **Open Balance** - The order has been invoiced. • **Completed** - The order has been shipped and paid. **Note:** Depending on how the web site is set up for your company, the statuses may be different.
Ship Date	The date the order was shipped.

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Field	Description
PO Number	The purchase order number, if specified.
Release Number	The release number, if specified.
Ship-To	The Ship-To account name.

2. To view orders and bids that occurred during a specific date range, enter the date range in the **From** and **To** date fields.

   For example, if you only want to view orders placed during September 2002, type **09/01/2002** in the **From** field and **09/30/2002** in the **To** field.

3. In the **Select By** field, select **Order Date** to select orders and bids that have an order date that falls within the date range you entered. Select **Ship Date** to search on the ship date of an order.

4. Click **Go.**

To search for a transaction:

1. From **My Account,** select **Open Orders** to display the Open Orders page.

2. In the search field at the bottom of the displayed orders table, enter one of the following:

   - Reference number
   - Purchase order number
   - Release number

3. Click **Go**.

   If one item is found, it opens. If more than one item is found, a list displays under the Search Results For heading. Click a listed item to display it.

   Note: The first time you initiate a search, the date range adjusts to include the orders returned in the search results. If you narrow the date range and search again, the date range also applies to the search. For example, if you are viewing orders and bids for 09/01/2003 to 09/30/2003, searching brings up all the matching transactions that fall within the date range.

To view transaction details:

1. From **My Account,** select **Open Orders** to display the Open Orders page.

2. In the **Order Number** column, click a transaction number.

   The following order details display:

   - All the order items
   - Subtotal
   - Tax
   - Freight charges

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- Handling charges
- Discount (if applicable)
- Total amounts
- Shipping information

Note: For nonstock products, *CALL* may display in place of the availability and prices, and in place of the order totals. Call the distributor for price information.

To copy items from a past order to your current order:

1. View a listed order.
2. Click **Copy Items to Current Order** to copy the items from the order to your current shopping cart.

To copy items from an order or bid to a product group:

1. View a listed order.
2. Click **Copy Items to Product Group** to copy the items from the order to your current shopping cart.

To modify an open bid:

1. From **My Account,** select **Open Orders** to display the Open Orders page.
2. In the **Order Number** column for a Submitted order, click a transaction number to display the bid contents.
3. Click the **Modify Bid** button at the bottom of the page to modify the bid.

   Modify the bid and add or delete items, as necessary.

   Note: If another user is currently modifying the same bid, a message displays at the top of the order review page indicating that another user is modifying the same order and that your changes cannot be submitted.

Copy items from a bid to your current order:

1. View a listed bid.
2. Click **Copy Items to Current Order** to copy the items from the order to your current shopping cart.

See Also:

Account Information in Web Commerce Overview

Reviewing Your Shopping Cart Contents

Viewing Order History in Web Commerce

Use the Order History page to view all transactions affecting your accounts receivable (A/R) balance. You can view orders and payments applied to each order. The order list displays in chronological order, with the most recent transaction first.

When on the Order History page, you can do any of the following:

- View your account and order history.
- Search for a transaction.
- View sales order details.
- View cash receipt details.
- View the A/R audit information for a transaction.
- Copy items from a past order to your current order.

To view your account and order history:

1. From **My Account**, select **Order History** to display the Order History page.

   Each order contains the following information:

Field	Description
Reference #	The sales order number.
Br	The branch from which the order was placed.
Post Date	The date the transaction posted to your account.
Description	The transaction description, such as purchase order number for an order, or check number or cash for a payment.
Debit	The amount charged to your account.
Credit	The amount credited to your account.
Balance	The total running balance.

2. To view orders for a specific date range, enter the date range in the **From** and **To** fields.

   For example, if you only want to view orders placed during September 2002, type **09/01/2002** in the **From** field and **09/30/2002** in the **To** field.

   Note: The **To** field defaults to the current date. To view future transactions, change the date to one in the future.

3. Click **Go** next to the **To** field.

To search for a transaction:

1. From **My Account**, select **Order History** to display the Order History page.
2. In the search field at the bottom of the displayed orders table, enter one of the following:

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   - Reference number
   - Purchase order number
   - Release number
3. Click **Go**.
   - If one item is found, it opens automatically.
   - If more than one item is found, a list displays. Click a listed item to display it.

To view sales order details:

1. From **My Account**, select **Order History** to display the Order History page.
2. In the **Reference #** column, click a sales order transaction.

   An Invoice Number page displays details about the order.

To view cash receipt details:

1. From **My Account**, select **Order History** to display the Order History page.
2. In the **Reference #** column, click a cash receipt transaction.

   A View Deposits page displays details about the payment.

To view the A/R audit information for a transaction:

1. From **My Account**, select **Order History** to display the Order History page.
2. In the **Balance** column, click a balance amount.

   The Audit Information page displays A/R details including the posting date, discount date, and due date. The original amount and current balance display, as does aging information.

To copy items from a past order to your current order:

1. View a sales order transaction.
2. Click **Copy Items to Current Order**.

See Also:

Account Information in Web Commerce Overview

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Viewing and Printing Invoices in Web Commerce

Use the Print Invoices page to display all your previous invoices that fall within the date range you specify. After the invoices display, you can print the invoices.

You can use a *printer-friendly* option, so the invoices open in another browser window. The new browser window omits the web commerce menus and navigation features, which makes for cleaner printed invoices.

To view and print invoices:

1. From **My Account**, select **Print Invoices**.
2. Use the **From** and **To** date fields to specify the date range for which you want to print invoices.

   For example, if you want to print invoices for September 2002, type **09/01/2002** in the **From** field and **09/30/2002** in the **To** field.

   Note: The **To** field defaults to the current date. To view future transactions, change the date to one in the future.

3. Click **Go**.

   The invoices from the dates you specify display.

   Note: It may take a few minutes to display your invoices. Do not click your browser's **Back** or **Reload** buttons while the system prepares the invoices.

4. To print invoices, do one of the following:
   - To print invoices include the surrounding web page, use your browser's print feature to print the invoices.
   - To print invoices without including the surrounding web page, use the **Click here for a printer friendly version** link.

See Also:

Account Information in Web Commerce Overview

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Sending Messages From Web Commerce

Use the web site to send messages to a company representative who can then send you an e-mail response. For example, if you have a question regarding a product you see on the web site, send a message with your question to a company representative.

Depending on your web site settings, the messaging feature may not be available to you.

To send a message from Web Commerce:

1. From **My Account**, click **Send Message** to display the Send Message page.
2. From the **Employee - Title** drop-down list, select the employee to which you want to send the message.
3. In the **Message** field, type the body of your message.
4. In the **Your email address** field, type your valid e-mail address.

   Note: You must provide an e-mail address so the company representative can send a response to your message.

5. Click **Send Message**.

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Editing Shipping Information for Web Orders

Use the Shipping Information page to edit the default shipping information for your user account. You can change the defaults by providing additional information, such as a release number or special shipping instructions for an order.

The information on this page is necessary to ship your order.

To edit shipping information:

1. From **My Account**, select **Shipping Information** to display the Shipping Information page.
2. Edit the shipping information as needed. An asterisk (*) next to a field name identifies a required field.

Field	Procedure
Ship-To Name	Select another account from the list. A message alerts you that all fields will be reset to use the defaults for the new account; confirm to continue.
Address, City, State, Zip, Phone, Email, or Required Date	Type over the existing information. If you enter an invalid zip code and city combination, a page displays to select a valid zip code; you can search or select from a list.
Purchase Order #	Enter a unique identification number for the order.
Release #	Enter the control code that you can assign to an order for any purpose, such as customer-specific tracking.
Ordered By	Enter a name or select one from the drop-down list.
Order Status	Select an order status from the drop-down list.
Ship Via	Select a ship via from the drop-down list. For example, UPS.
Shipping Instructions	Edit or enter your shipping instructions.

3. Click **Continue**.

   Note: You can also edit shipping information when you select a shipping address as you are logging in to the web site. Click **Edit** next to the shipping address you want to edit.

See Also:

Account Information in Web Commerce Overview

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