Dealer Station Admin Manual

eci2

eCommerce Industries, Inc.

ddms distribution software

August 2005 Item # H-DSADMIN

Contents

Introduction

Internet-based Dealer Station DDMS Edition is designed specifically for real-time, business-to-business Internet e-commerce. Dealer Station DDMS Edition uses a standard web page interface and runs entirely within your customer's web browser.

The Dealer Station DDMS Edition end-user web page is geared more toward the business customer, not individual consumers. An item search feature lets your customers quickly key in an item number to retrieve the item to order — no more long searches through categories and manufacturers to find the item they need. Dealer Station DDMS Edition also includes a search catalog function, as well as a "favorites" feature. The favorites feature acts as a file cabinet, allowing your customers to store a list of favorite items they commonly purchase.

Dealer Station DDMS Edition provides live interaction with your DDMS system so your customers can see their actual prices instead of catalog prices. This greatly increases order efficiency and accuracy — fewer mistakes mean less wasted time and effort.

Another key feature is the ability to view past orders. Customer can quickly see at a glance what they've ordered and when — a feature not always offered by other web sites.

You can customize the customer's Dealer Station DDMS Edition home page by changing the color of the text or the web page's style and so on. You can offer such features as a list of today's specials and news directed at all your customers or specific customers.

You can also set preferences for all of your customers or individual customers. For example, you can accept credit card orders from some customers, but not all. Dealer Station DDMS Edition lets you easily indicate which customers can use credit cards when placing orders, and which customers cannot.

In addition to these features, your customers' accounts and transactions are secure. Their login, checkout and update information pages use SSL security. This protects their passwords and credit card numbers.

Note: Throughout this document, references are made to screens in the DDMS text-based system. In parenthesis, next to the text-based screen, are the corresponding graphical windows.

Chapter 1: Logging In and Out of Dealer Station DDMS Edition

Contents

Using the Administrative Control Panel

Use the following instructions to log in and out of the Dealer Station DDMS Edition Administrative Control Panel:

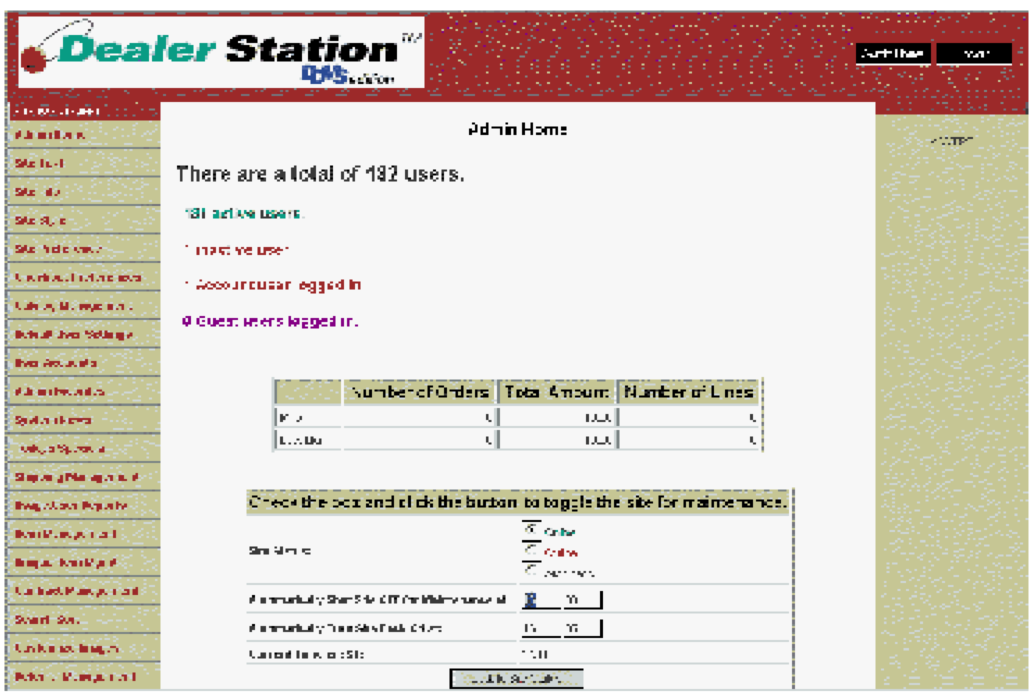
1 Your link is provided by the installation specialist in support. Go to www.officesupply-link.com / ASSIGN A FOLDER NAME or your custom URL.

The Username and Password boxes open, as shown in Figure 1-1.

2 When this box displays, enter your user name and password and click Login.

Figure 1-1: The Username and Password Boxes

Figure 1-2: The Dealer Station DDMS Edition Administrative Home Page



3 The Dealer Station DDMS Edition Administrative Control Panel opens. A portion of the Control Panel is shown in Figure 1-2. This window lets you easily determine active and inactive users, the number of users logged in, and the number of orders being processed. This is a helpful tool for consistent monitoring of your system. For example, you can view sales for the previous month as well as the month-to-date. This information is updated as soon as an order is placed. You can also view the total number of orders, total order amount, and the total number of line items sold.

   In addition to displaying information, this window lets you perform a variety of administration functions. These functions are detailed in the parts that follow.

4 When you're ready to exit the Dealer Station DDMS Edition Control Panel, click the Logout button. The cursor returns to the Login page.

Turning the Site Off and On for Maintenance

You can turn off the site temporarily to perform maintenance. When you do this, a message is sent to your end-users indicating the site is currently offline for maintenance. You can customize this message. See **Chapter 2: Site Text**.

To turn the site off, click Offline in the Administrative Control Panel. The text, The Site is Currently Offline, displays at the top of the window. When end-users try to log in, they receive a message that the site is down for maintenance. Click Update Site Status.

To turn the site on, click Online, then click Update Site Status.

You can schedule routine maintenance. To prevent rushing users, 15 minutes before maintenance begins, no new logins are allowed. Popup messages appear 15, 10, five and one minute before the site goes offline, reminding users maintenance is about to begin.

To schedule maintenance:

1. In the Administrative Control Panel, click Automatic.
2. In the Automatically Shut Site Off for Maintenance box, enter the time to go offline, using a 24-hour clock. All times are Eastern. For example, to turn off the site at 4:30 PM Eastern, type 16:30. However, to turn off the site at 4:30 Pacific, type 19:30. To help you figure the difference between time zones, the time (current when you logged on or clicked Update Site Status) appears.
3. In the Automatically Turn Site Back On, enter the time to go back online. Allow enough time to complete your proc.
4. Click Update Site Status.

Order Time Stamping

Dealer Station time stamps the order when it’s transmitted to DDMS. If your customer calls for an order status, you can tell whether the order came into DDMS for processing by the daily cut-off deadline. The date can be found on the order as a ZZZZ line special (order note).

Chapter 2: Site Text

Contents

Using the Site Text Feature

You can use the Site Text feature to change the information on the end-user's Dealer Station DDMS Edition website. For example, you can change the link names, My Favorites or Shopping List. You can also change the error messages your end-users receive while placing orders, and so forth.

1. Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.
2. After the Dealer Station DDMS Edition Control Panel opens, click 

to change the text.
3. The Change Site Text window opens. Use the following headings to change information in this window.

Caption Text

The Caption Text boxes include the Order Center through Quick Order Comments Text boxes. See Figure 2-1.

These boxes let you customize the section titles that appear on the end-user's web page. For example, you could change the section My Account, to Account Information.

1. Click each box to change and enter the new text over the existing text. For example, to change My Orders to Orders, remove the word My from the text.

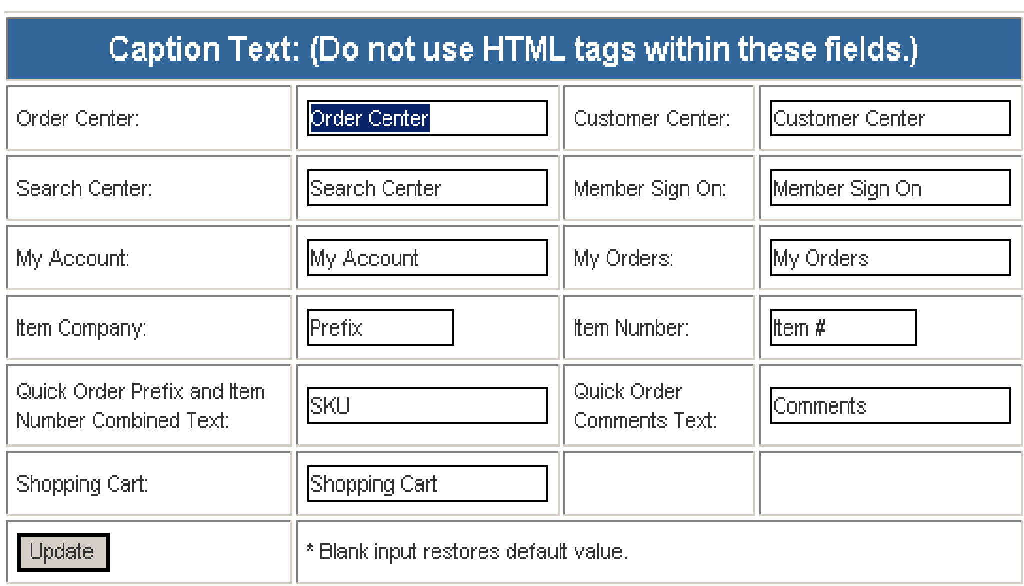


Figure 2-1: Caption Text Text Boxes

Note: You can enter HTML script in any of these boxes. However, DDMS does not provide HTML support.

2 When you finish, click Update. The changes immediately appear on the end-user's web page.

Confirmation Email

The Confirmation Email dialog boxes include the Mail Format through Confirmation Email Text Bottom boxes. See Figure 2-2.

These boxes let you customize the mail format (HTML or text) and the confirmation email text that appears on the top and bottom of the page. You can enter text or HTML script in this box.

1 Click each box for which to make changes and enter the new text over the existing text.

2 When you finish, click Update.

Center Stage Link Text

The Center Stage Link Text dialog boxes include the Home through About Us boxes. See Figure 2-3.

These boxes let you customize the link names that appear on the center stage area of the end-user's web page. For example, to change News to Our News, add the word Our to the text.

1 Click each box for which to make changes and enter the new text over the existing text.

2 When you finish, click Update.

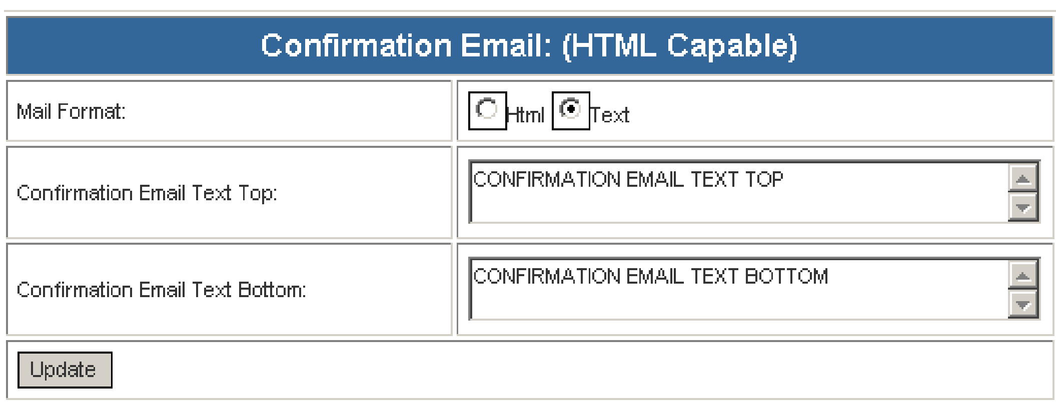


Figure 2-2: Confirmation Text Text Boxes

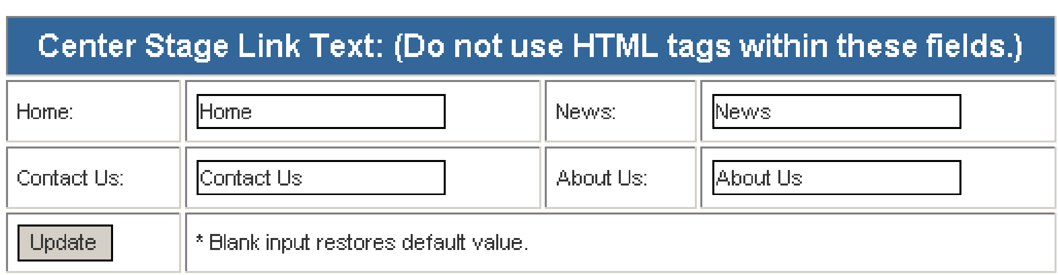


Figure 2-3: Center Stage LinkText Boxes

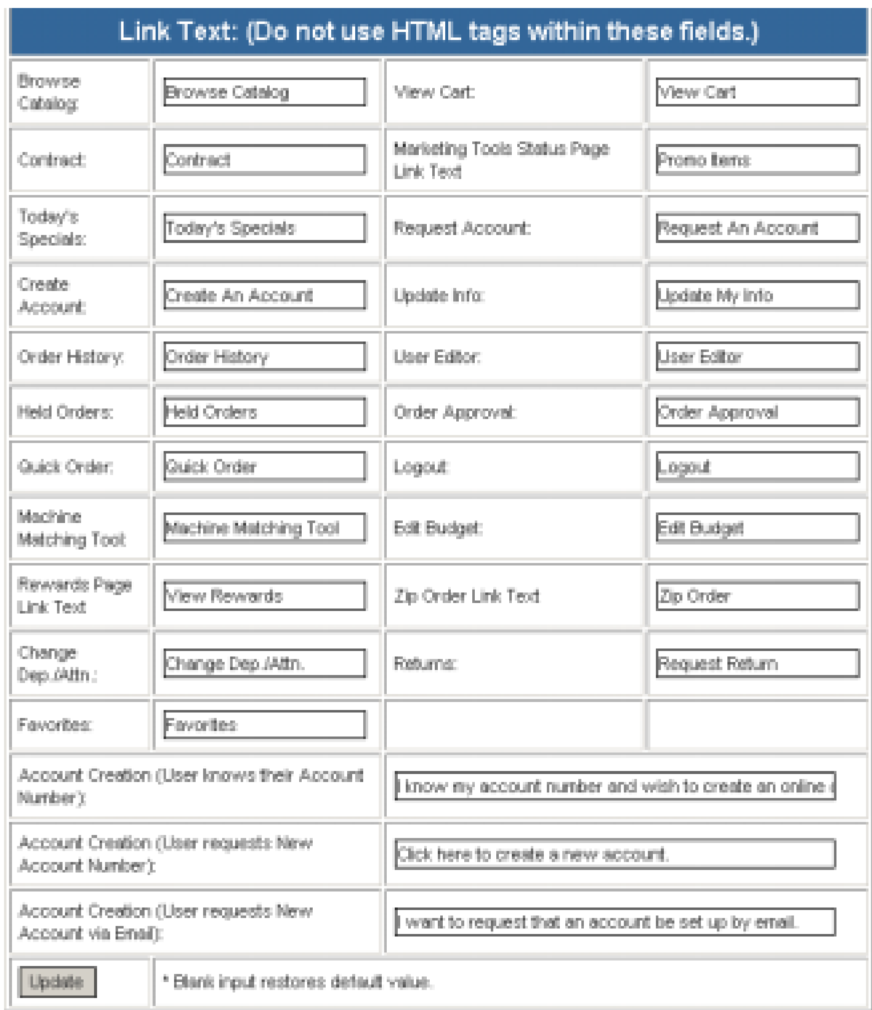
Link Text

The Link Text dialog boxes include the Browse Catalog through Returns boxes. See Figure 2-4.

These boxes let you customize the link names that appear on the end-user's web page. For example, you could change the text My Favorites, to Favorites or Frequent Purchases, and so on.

1. Click each box for which to make changes and enter the new text over the existing text. For example, to change My Favorites to Favorites, remove the word My from the text.
2. When you finish, click Update. The changes you made immediately appear on the end-user's web page.

Figure 2-4: Link Text Text Boxes



Cart Actions Text

The Cart Actions dialog boxes include the Add to Cart through Buy Now boxes. See Figure 2-5. These boxes let you customize the button names that appear next to items in the catalog. For example, you could change the Buy Now button to Buy Item Now. Cart Actions also allow you to change the text in the multi-select drop down menu seen on the Favorites page, for example.

1. Click each box to change. Enter the new text over the existing text. For example, to change Buy Now to Buy Item Now add the word Item to the text.

Note: You can enable and disable the Add to Favorites and Buy Now buttons. To enable the buttons or button so they appear on the website, click Enable. To disable the buttons or button so they do not appear on the website, click Disable.

2. When you finish, click Update. The changes immediately appear on the end-user's web page.

Note: You can enter up to 18 characters in the Button boxes and 35 characters in the Select boxes. You cannot use HTML in these boxes.

Home Page Text

This function lets you change the text that appears on the Home page of the Dealer Station DDMS Edition site, as shown in Figure 2-6. You can enter text or HTML script in this box.

1. To change the text that appears on the Home Page, click anywhere in the Home Page Text text box and enter the new information over the existing information.
2. When you finish, click Update. The changes appear immediately on the Home Page.

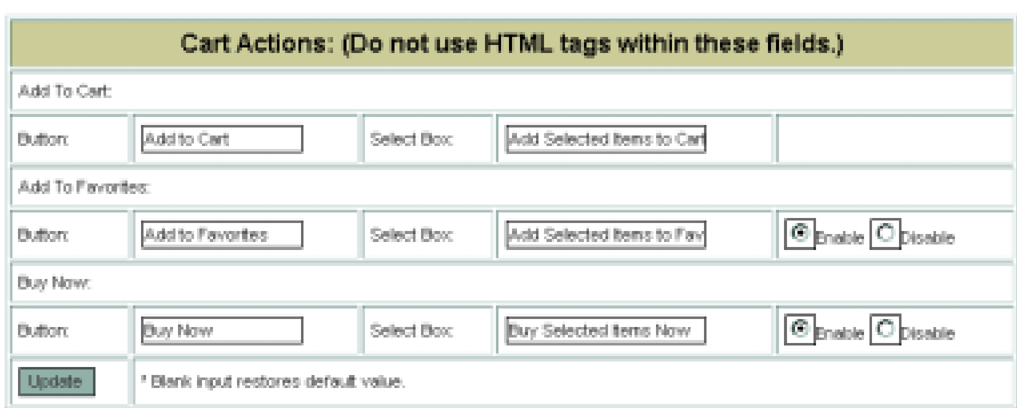


Figure 2-5: Cart Actions Text Boxes

Contact Page Text

This function lets you change the text that appears on the Contact Us Page of the Dealer Station DDMS Edition site. See Figure 2-7. You can enter text or HTML script in this box.

1 To change the text that appears on the Contact Page, click anywhere in the box under the heading Contact Page Text. Enter the new information over the existing text.

2 When you finish, click Update. The changes appear immediately on the Contact Us Page.

About Page Text

You can change the text that appears on the About Us page of the Dealer Station DDMS Edition site. You can enter text or HTML script in this box, as shown in Figure 2-8.

1 To change the information on the About page, click anywhere in the About Page Text text box. Enter the new information over the existing text.

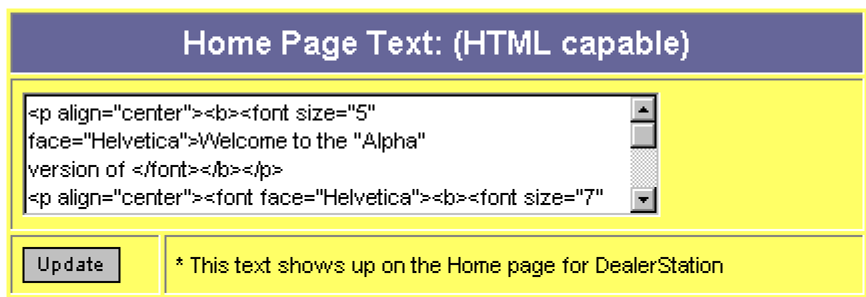


Figure 2-6: Home Page Text Text Box

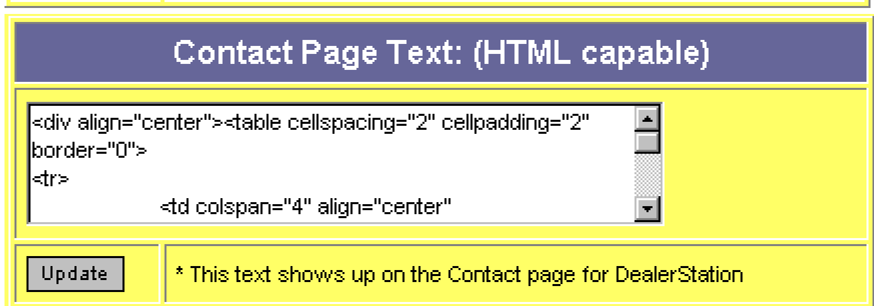


Figure 2-7: Contact Page Text Text Box

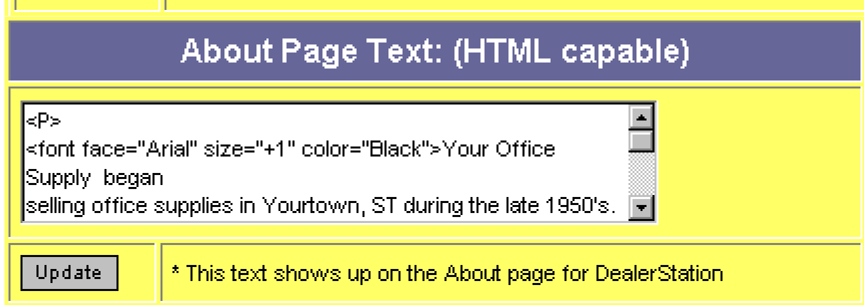


Figure 2-8: About Page Text Text Box

2 When you finish, click Update. The changes appear immediately on the About page.

Login Page Text

You can change the text that appears on the Home Page of the Dealer Station DDMS Edition site, as shown in Figure 2-9. You can enter text or HTML script in this box.

1 To change the text that appears on the Login page, click anywhere in the Login Page Text text box. Enter the new information over the existing text.

2 When you finish, click Update. The changes appear immediately on the Login page.

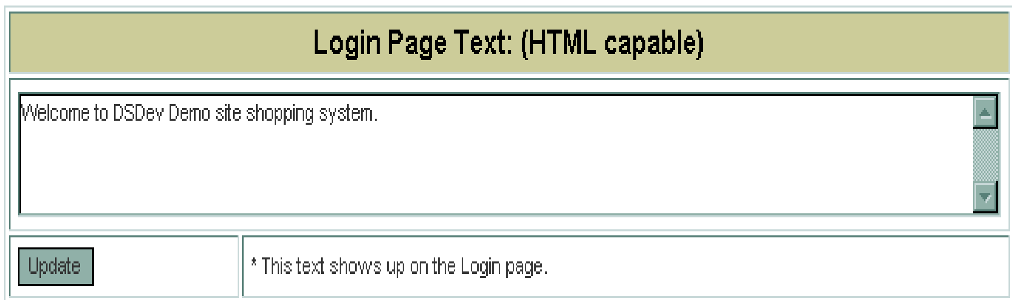


Figure 2-9: Login Page Text Text Boxes

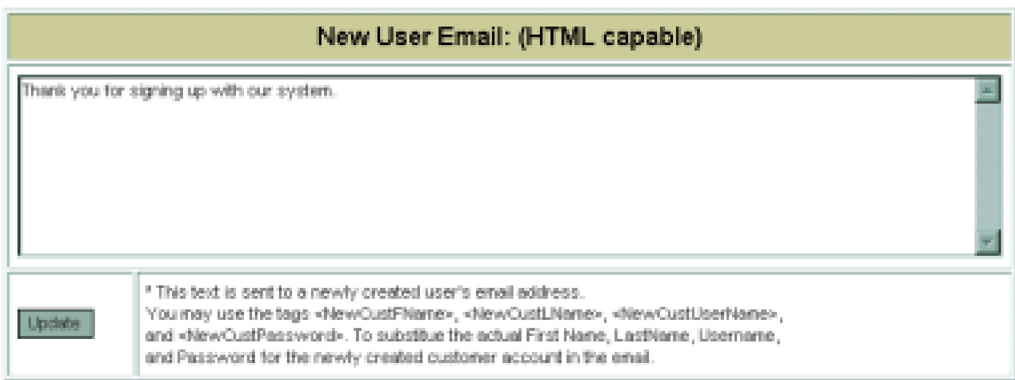


Figure 2-10: New User Email Text Boxes

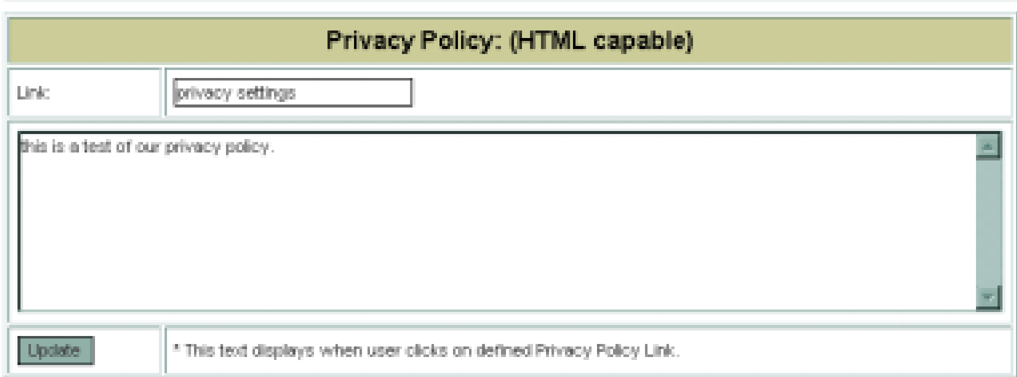


Figure 2-11: Privacy Policy Text Boxes

New User Email Text

You can set up a confirmation email for new users added by a guest user. See Figure 2-10.

1. To set up an email confirmation, click anywhere in the New User Email text box. Enter the confirmation information.
2. When you finish, click Update. The changes are implemented immediately.

Privacy Policy Text

You can post a privacy policy when handling end-users' confidential data. See Figure 2-11.

1. To set up a privacy policy, click anywhere in the Privacy Policy text box. Enter the privacy policy text.
2. When you finish, click Update. The changes are implemented immediately.

Down for Maintenance Text

You can post a message when the DDMS backend system is under maintenance. See Figure 2-12.

1. To set up a down for maintenance message, click anywhere in the Down for Maintenance Text text box. Enter the error message.
2. When you finish, click Update. The changes are implemented immediately.

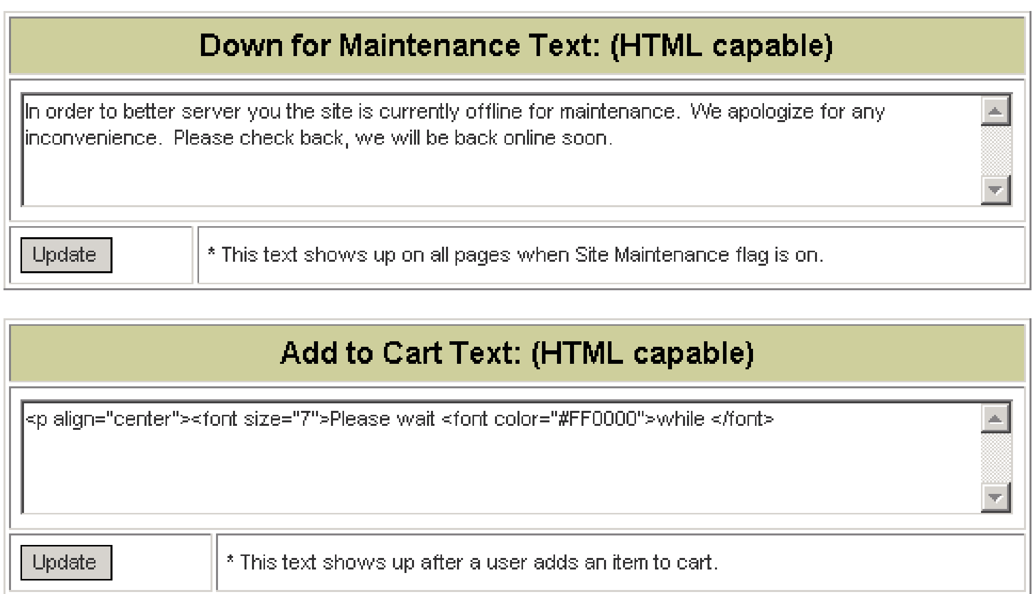


Figure 2-12: Down for Maintenance Text and Add to Cart Text Text Boxes

Note: This text shows up on all pages when the Site Maintenance flag is on.

Add to Cart Text

You can customize the text that appears while an item is being added to the cart. See Figure 2-12. This box is HTML capable.

1. To change the text, click anywhere in the box labeled Add to Cart Text. Enter the new text.
2. When you finish, click Update. The changes appear immediately.

Shopping Cart Text

You can customize the text that appears on the shopping cart page of the Dealer Station DDMS Edition site, as shown in Figure 2-13. This box is HTML capable.

1. To change the text that appears on the shopping cart page, click anywhere in the box labeled Shopping Cart Text. Enter the new text.
2. When you finish, click Update. The changes appear immediately on the Shopping Cart page.

Change Department Page Text

You can customize the text that appears on the Change Department page. See Figure 2-13. This is a text-only box; it is not HTML capable.

1. To change the text on the Shopping Cart page, click anywhere in the Change Department Page Text box. Enter the new text.

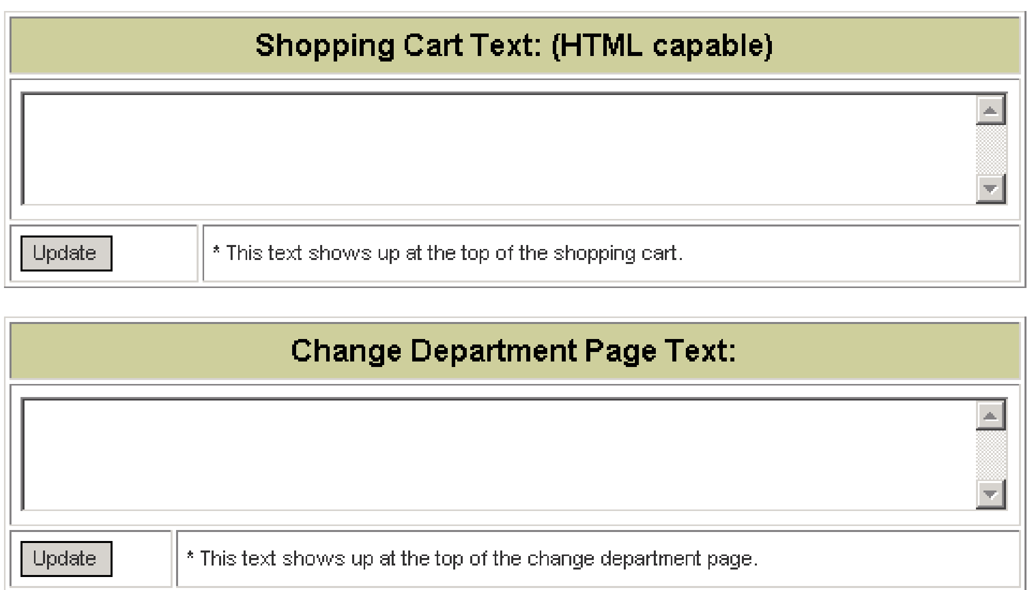


Figure 2-13: Shopping Cart Text and Change Department Page Text Text Boxes

2 When you finish, click Update. The changes appear immediately.

Questions Text On Login Page

You can customize the text that appears on the end-user's login page. See figure 2-14. You can enter text or HTML in these boxes.

1 To customize the text, click anywhere in the text box. Enter the new text over the existing text. You can use any of the HTML tags listed below the text box.

2 When you finish, click Update. The Login page is updated immediately.

Account Request Text

You can customize the instructions or promotional messages for the Account Request page. See figure 2-14. You can enter text or HTML in this box.

1 To customize the text, click anywhere in the text box. Enter the new text over the existing text. You can use any of the HTML tags listed below the text box.

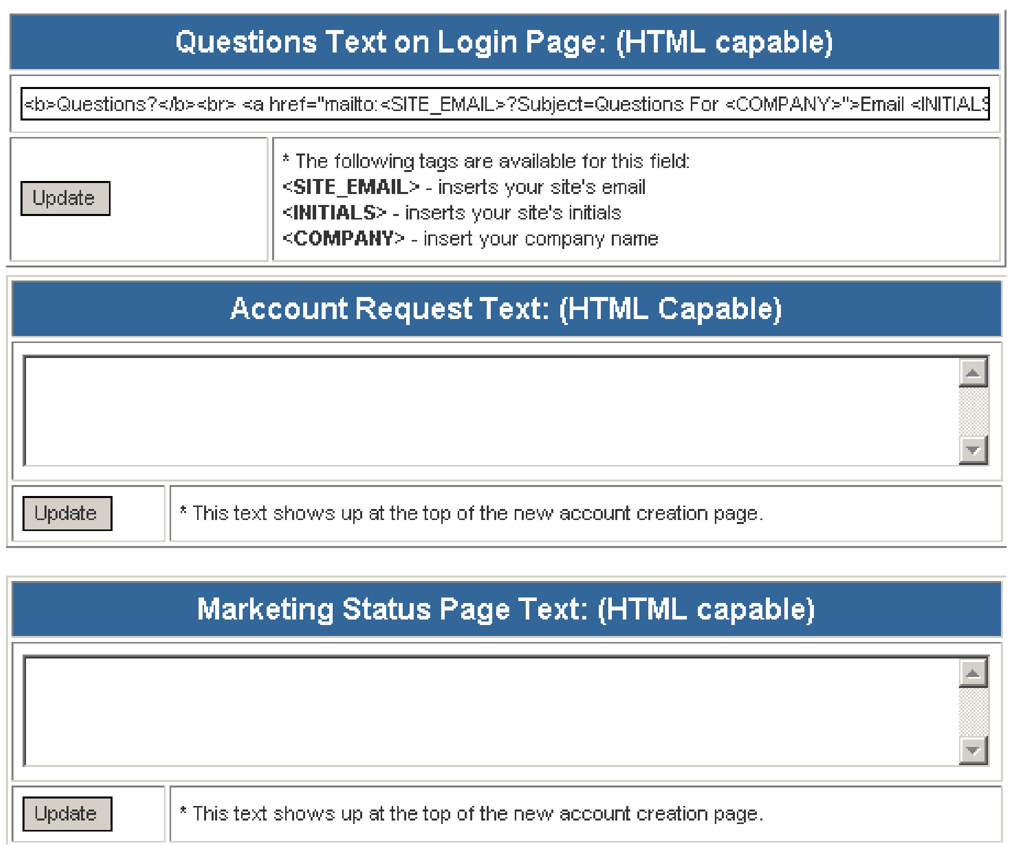


Figure 2-14: Questions Text on Login, Account Request Text, and Marketing Status Page Text Boxes

2 When you finish, click Update. The Login page is updated immediately.

Marketing Status Page Text

You can customize the text that appears on the end-user's Marketing Status Page. See figure 2-14. You can enter text or HTML in these boxes.

1 To customize the text, click anywhere in the text box. Enter the new text over the existing text. You can use any of the HTML tags listed below the text box.

2 When you finish, click Update. The Login page is updated immediately.

Figure 2-15: The Miscellaneous Text Text Boxes

Miscellaneous Text:	
Department Title for Change Departments:	Department
Direct Department Entry Title for Change Departments:	Direct Department Entry
Attention Title for Change Attenions:	Attention
Return to Catalog Link on Cart Page:	Return to Catalog
Return to Site Link on Change Deptartment:	Return To Site
Text for Change Departments Button:	Change Department
Text for Change Attention Name Button:	Change Attention Name
Return Page For Non-Returned Items:	Please keep this item and contribute it to your favorite charity.
Return Page For Returning Items:	Please make arrangements for these items to be picked up.
Text for ReOrder Button:	ReOrder
Update	

Miscellaneous Text

The Miscellaneous Text box includes the Department Title for Change Departments through Text for ReOrder Button boxes, as shown in Figure 2-15. These boxes let you customize the text for specific links throughout the system.

1 To customize this text, click anywhere in the boxes. Enter the new text over the existing text.

2 When you finish, click Update.

Order Status Text

The Order Status Text box includes the Out for Delivery through Delivered boxes, as shown in Figure 2-16. These boxes let you customize the text to inform customers about the status of their orders. To customize this text:

1 Click anywhere in the boxes. Enter the new text over the existing text.

2 When you finish, click Update.

Figure 2-16: Order Status Text Boxes

Order Status Text:	
Out for Delivery:	Out for Delivery
Some Out for Delivery:	Some Out for Delivery
Delivery Complete:	Delivery Complete
Partially Delivered:	Partially Delivered
All Items Are Un-Delivered:	Order Being Processed
Order on Hold:	Hold Order
Order Being Processed:	Order Being Processed
Order Preparing to be Shipped:	Order Being Prepared to Ship
Picking Manifest Assigned:	Picking Manifest is Assigned
Wholesaler Confirmed:	Wholesaler Confirmed and Shipped
Item Out for Delivery:	Out for Delivery
Delivered:	Delivered
Update	

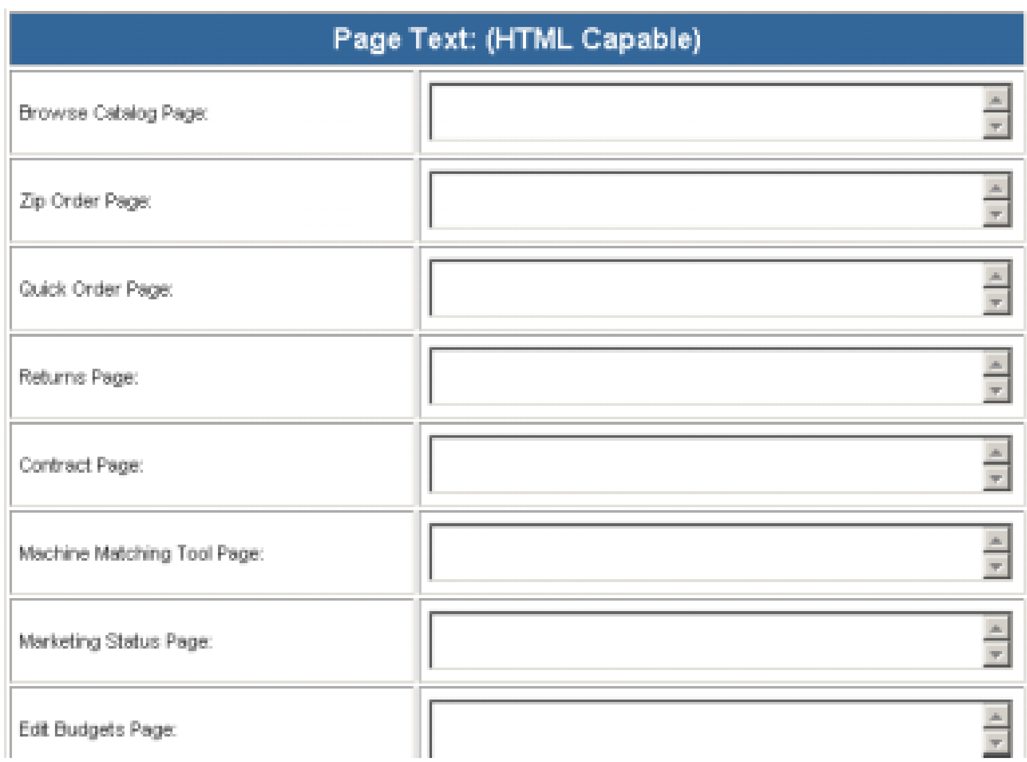
Page Text

The Page Text box includes the Browse Catalog Page through Super User's User Editor Page boxes. See Figure 2-17. To customize this text:

1 Click anywhere in the boxes. Enter the new text over any existing text.

2 When you finish, click Update.

Figure 2-16: Page Text Boxes



Chapter 3: Site Information

Contents

Using Site Information

You can use the Site Information feature to add or change your company's information. For example, you can use this window to enter your company's name, address, phone and fax numbers, as well as contact information. It is important to enter this information and make contact information readily available for your users so they can get in touch with you at any time.

1 Log into the Dealer Station DDMS Edition Control Panel. For instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

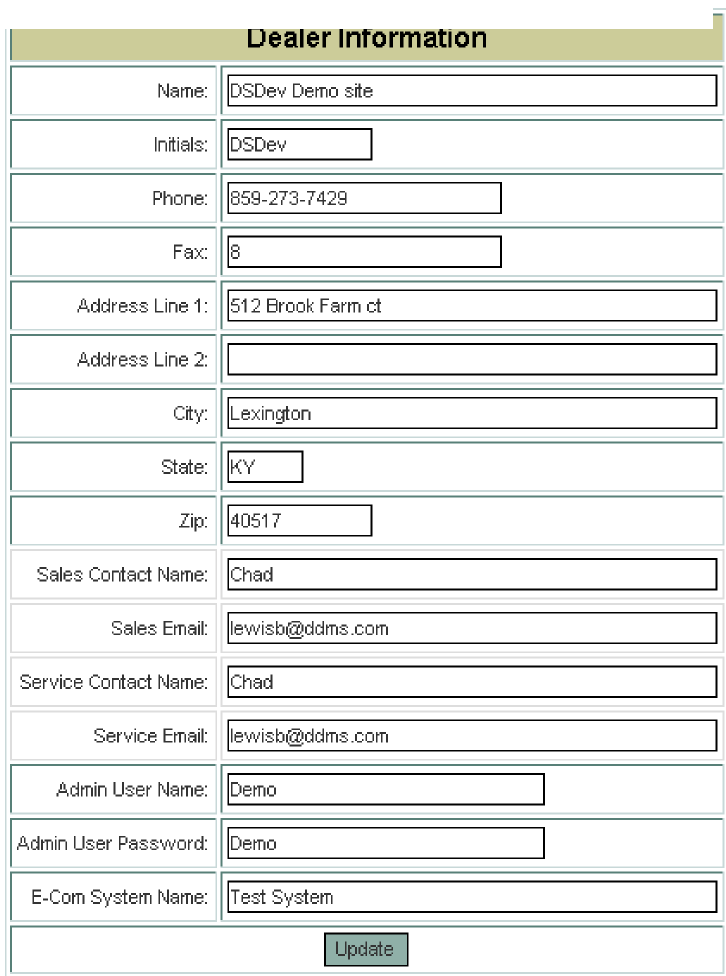


Figure 3-1: Setting Your Preferences

Note: The information in these boxes are an example of how you should enter your own information.

2 After the Dealer Station DDMS Edition Control Panel opens, click Site Info.

3 The Dealer Station DDMS Edition Dealer Information window opens, as shown in Figure 3-1.

Click in each box to change and enter the new text over the existing text. You can change each of the following:

- **Name:** Enter your company name.
- **Initials:** Enter the company's initials, for example, DDMS.
- **Phone:** Enter your company's phone number.
- **Fax:** Enter your company's fax number.
- **Address Line 1/Address Line 2:** These boxes display the street address and / or PO box used in your address. When adding an address, you can enter up to 25 alphanumeric characters in the first box and 25 alphanumeric characters in the Address Line 2 box.
- **City:** Enter the city in your company's address.
- **State:** Enter the state or country in your company's address.
- **Zip Code:** Enter the zip code in your company's address.
- **Sales Contact Name:** Enter the name of the sales contact within your company.
- **Sales Email:** Enter the email address of the sales contact within your company.
- **Service Contact Name:** Enter the name of the service contact within your company.
- **Service Email:** Enter the email address of the service contact within your company.
- **Admin User Name:** You can use this box to change your user name. This is the name you enter in the Username box when accessing the Dealer Station DDMS Edition Control Panel.
- **Admin User Password:** You can use this box to change your user password. This is the password you enter in the Password box when accessing the Dealer Station DDMS Edition Control Panel.

- **E-Com System Name:** This box is not used by Dealer Station DDMS Edition. Leave this box blank.

4 When you finish, click Update to save your changes. If you exit this window without clicking Update, the changes you made are not saved. Click Admin Home to return to the Dealer Station DDMS Edition Administrative Control Panel.

Chapter 4: Site Style

Contents

Using Site Style

You can use the Site Style feature to change the way information appears on the end-user’s Dealer Station DDMS Edition home page. This is the first page your end-users access when placing orders. For example, you can change the border of the web page or the text color from red to blue or green, and so on.

1 Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**

2 After the Dealer Station DDMS Edition Control Panel opens, click 

.

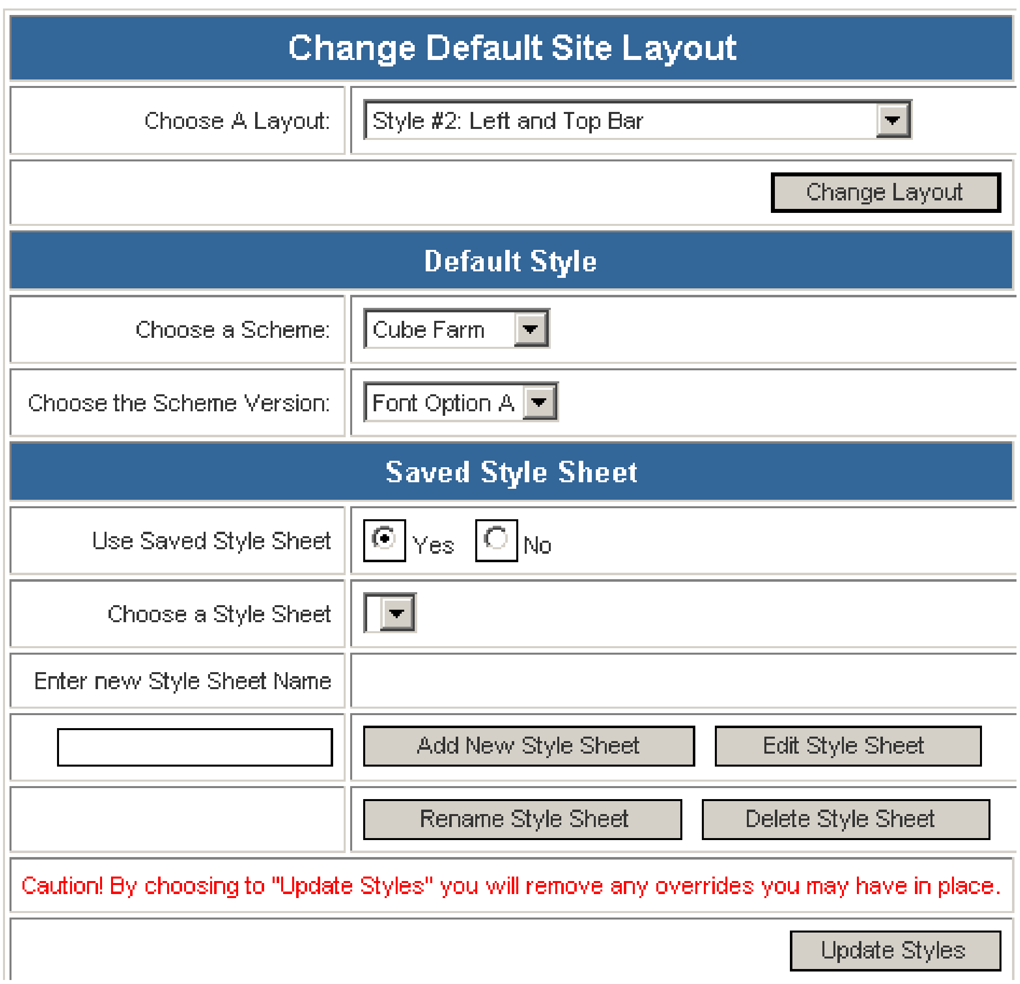


Figure 4-1: The Change Default Site Style Window

3 The Change Default Site Style window opens, as shown in Figure 4-1. At this point, you can change the style of the end-user's home page by changing the default style layout, or you can select a saved style sheet to display on the end-user's home page.

Changing the Default Style Layout

Use the following steps to change the default style layout on the end-user's home page.

1 To change the current layout, use the Choose a Layout drop down list box to select a layout. The layouts are displayed under the Site Style Thumbnails box. The name in the list box corresponds to the site style numbers. See Figure 4-2.

Style 1 Left and Right Bar

Style 2 Left and Top Bar

Style 3 Left and Top Bar (version 2)

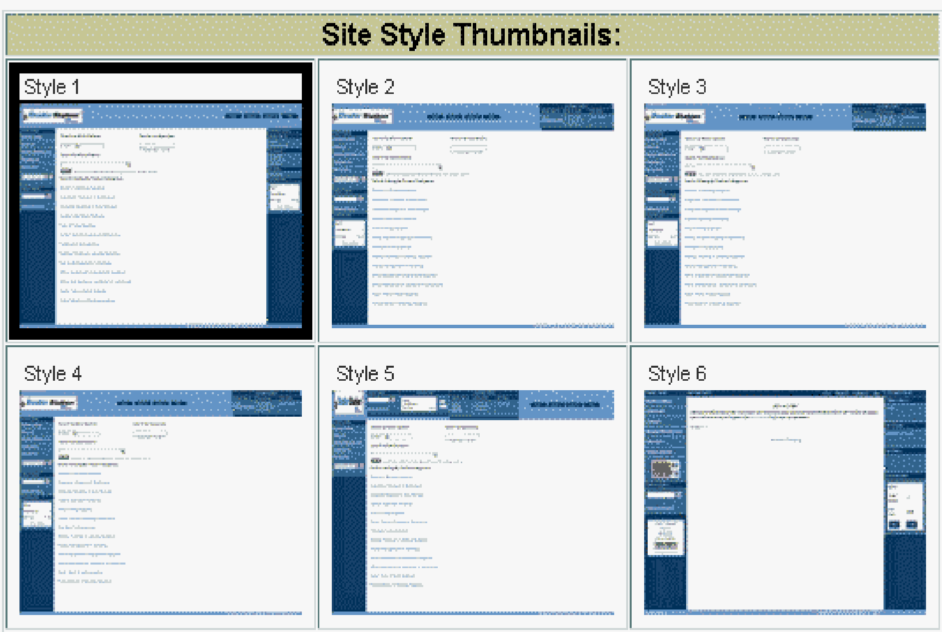
Style 4 Left and Top Bar (long graphic-top)

Style 5 Left and Top Bar (small graphic)

Style 6 Left and Right Bar (no top header)

2 When you finish, click Change Layout. The website is immediately updated.

Figure 4-2: Site Style Thumbnails (Layouts)



Note: Logos in each of the layouts must follow certain requirements. In Site Style 3 (Left and Top Bar version 2) logo sizes must not exceed 250x60 pixels in .jpg or .gif format. Site Style 5 (Left and Top Bar small graphic) logo sizes must not exceed 145x98 pixels in .jpg or .gif format. All other layouts must not have logo sizes exceeding 336x80 pixels in .jpg or .gif format. See **Chapter 19: Customize Images**.

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3. Use the Choose a Scheme drop down list box to change the color of your web page.
4. To choose a different font, use the Choose the Scheme Version drop down list box and choose one of the font options.
5. When you finish, click Update Styles. The web page immediately updates. To return to the Admin Home page, click Admin Home.

Selecting a Saved Style Sheet

Use the following instructions to add a new style sheet, edit an existing style sheet, rename an existing style sheet, or delete a style sheet.

1. In the Saved Style Sheet section of the web page, you can select a style sheet to display on your end-user’s web page. This includes style sheets that you have added and designed.
    - To change to an existing style sheet you have previously designed and named, click Yes in the Use Saved Style Sheet box. Then click the down arrow in the Choose a Style Sheet box and select the style sheet you want to use.
    - To add a new style sheet, click the box to the left of the Add New Style Sheet button and enter a style sheet name. When you finish, click the Add New Style Sheet button. The system opens the color sheet page so you can select the colors for the style sheet and the browser you want this sheet to apply. See Figure 4-3. You can choose the Microsoft IE, Netscape, or All Browser options. Click the down arrow in the Default Link Color box and select the color you want to use for this style sheet. Or you can click the Red, Green, and Blue boxes and enter the percentages of color you want to use. When you finish, click the Save Style button.
    - To edit an existing style sheet, click the down arrow in the Choose a Style Sheet box and select the style sheet you want to edit. The system displays the color sheet page so you can make the necessary changes. When you finish, click the Save Style button.

- To rename an existing style sheet, click the down arrow in the Choose a Style Sheet box and select the style sheet you want to rename. The cursor moves to the You Have Selected to Rename box. Enter the new name over the existing name. In the Are You Sure You Want to Rename This Style box, click Yes.
- To delete an existing style sheet, click the down arrow in the Choose a Style Sheet box and select the style sheet you want to delete. The cursor moves to the Are You Sure You Want to Delete This Style box, click Yes.

2 When you finish, click Update Styles. The web page immediately updates. To return to the Admin Home page, click Admin Home.

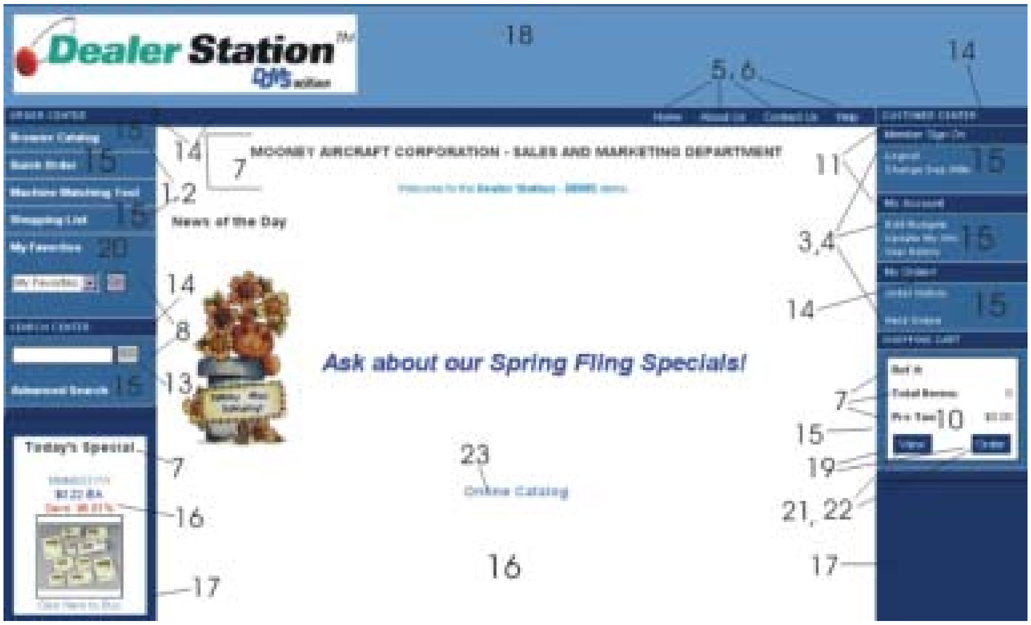
Figure 4-3: Selecting From a List of Colors

Changing Link Colors

There are several links throughout the website, such as Favorites and Customer Order Center. You can customize each link's color. Use the following instructions to customize link colors:

1. In the Site Style window, click the link Click Here to Override Styles.
2. The color boxes and drop down menu let you select a link and a new color for that link. The words Current Choice, seen below the drop down list, appear in the color you have just chosen. See Figures 4-4, 4-5, and 4-6 to view the location of the links listed.
3. The Microsoft IE and Netscape or Other options let you set up two different style sheets: one for compatibility with MS Internet Explorer and one for Netscape or other browsers. Click the option to set up. To set up a style sheet for both, build each style sheet separately.
4. When you finish, click Submit. Repeat these steps for every link you change.

Figure 4-4: Home Page Links Diagram



1	A.linkorder-Order Center Links Color
2	A.linkorder:hover-Order Center Links Hover Color
3	A.linkcust-Customer Center Links
4	A.linkcust:hover
5	A.link-Top Bar Links
6	A.linktop.hover-Top Bar Hover Links
7	TD (table data), DIV (divider), P (paragraph), Select, Text Area- Default Text Color
8	Input- Input Boxes
9	Copyright Text Color
10	Shopping Cart
11	Color 8- Cust Service Links
12	Color 7- Top Links
13	Color 6- Button Background
14	Color 5- Heading Background (does not affect color of links)

Figure 4-5: Login Page Diagram

Figure 4-6: Copyright Link Diagram

15a	Color 4- Subheading
15b	Color 4- Button Background
16	Color 3- Center Stage
17	Color 2- Ad Background
18	Color 1- Head and Foot Background
19	DIV (divider) Cart Button- Cart Button BG Color
20	DIV (divider) Faves Text Color Favorites Link Order Center
21	A.link Cart Shopping Cart Links
22	A.link Cart hover Shopping Cent Links
23	A:hover- Default Link color Center Stage

Chapter 5: Site Preferences

Contents

Using Site Preferences

Preferences act as parameters, allowing or refusing access to specific features and functions. There are three ways to set preferences for Dealer Station. You can set global preferences that affect all your system users, and you can set individual preferences that affect only specific users.

- The Site Preferences feature lets you set global preferences that affect all your system users.
- The User Accounts feature lets you assign individual preferences to specific users and is described later in **Chapter 10: User Accounts**.
- The Checkout Preferences feature lets you assign preferences to users when completing an order. For more information, see **Chapter 6: Checkout Preferences**.

When you set global preferences using the Site Preferences feature, it is important to remember that each function to which you deny access affects every end-user.

1. Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.
2. After the Dealer Station DDMS Edition Control Panel opens, click 

.
3. The Dealer Preferences window opens. The following text details each box and option in this window. When you finish changing information, click Update. If you exit this window without clicking Update, your changes are not saved. To return to the Dealer Station DDMS Edition Administrative Control Panel, click Admin Home.

   The first portion of the window shows the View Held Orders through Identify Contract Items boxes, as shown in Figure 5-1.

   - **View Held Orders:** Select which orders you allow your end-users to view. To specify which option you allow, click the appropriate option.
     - **View Orders Only for This User ID:** The end-user can only view orders placed using his or her User ID.
     - **View All Orders for This User's Department:** The end-user can only view orders for their customer departments.
     - **View All Orders for This Account:** The end-user can view all orders placed with his/her customer account number.

Note: This section refers to Held Orders, not Order History.

- **Override Home Page Link:** You can use this box to specify a web site link that will appear when users log off. If you specify a web site in this box, it applies regardless of the Guest option setting (active or inactive). All users will be sent to the site specified when logging off.
- **Max Quantity Per Line Item:** Set a maximum quantity end-users can purchase of any single line item. To use this feature, enter the maximum quantity limit in this box, 500, for example. The default for this box is 9999 line items. If you leave this box blank, there is no maximum quantity amount. Your end-users can order an unlimited number of any single line item.
- **Max Dollars Per Invoice:** Enter a maximum (pre-tax) dollar limit for each order your users place. To use this feature, enter the maximum dollar limit all in one string. For example, to place the maximum order limit at $20,000, enter 20000 in this box. The default for this box is $85,000.
- **Default Order Taker:** Enter a default order-taker for all the Dealer Station DDMS Edition orders that come through the DDMS system. You can specify up to four alphanumeric characters. The order-taker you specify must be set up in the (HY) Salesperson Master screen (Salesperson Database) on the DDMS system.

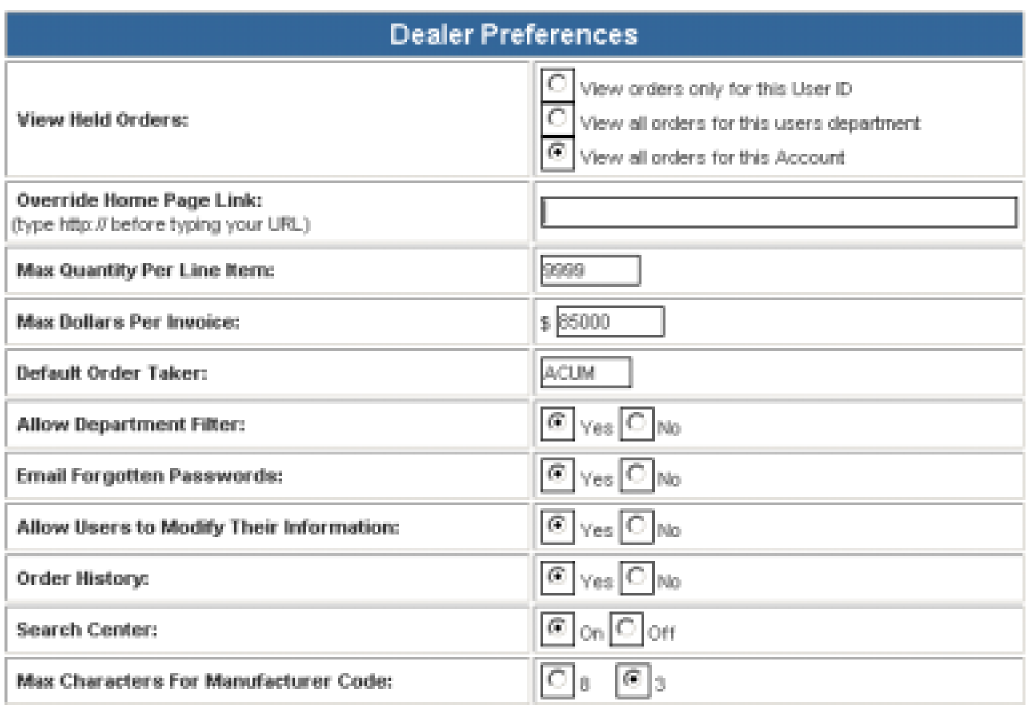


Figure 5-1: The View Held Orders through the Max Characters For Manufacturer Code Boxes

- **Allow Department Filter:** Some dealers have customers with a large number of departments. This feature lets the end users filter by specific departments on the Order History page. Select Yes to enable this feature.
- **Email Forgotten Passwords:** You can let end-users request that their password be emailed to them. The password is sent to the email address on file for this user. Select Yes to activate this feature.
- **Allow User to Modify Their Information:** You can let end-users change their name, email address and password. Select Yes to enable this feature.
- **Order History:** You can let end-users view their past orders. Click the appropriate option to allow or deny users to view their orders. The default allows them to view these orders.
- **Search Center:** You can let end-users access the search center feature. This is an additional search feature for your end-users. Click the appropriate option to allow or deny users to use the search center. The default allows them to use the search center.
- **Max Characters for Manufacturer Code:** You can limit the user's input area for the item prefix to three instead of the normal eight characters. This prevents entry errors in Quick Order when the dealer site uses three-character MAC codes for their DDMS item company box.

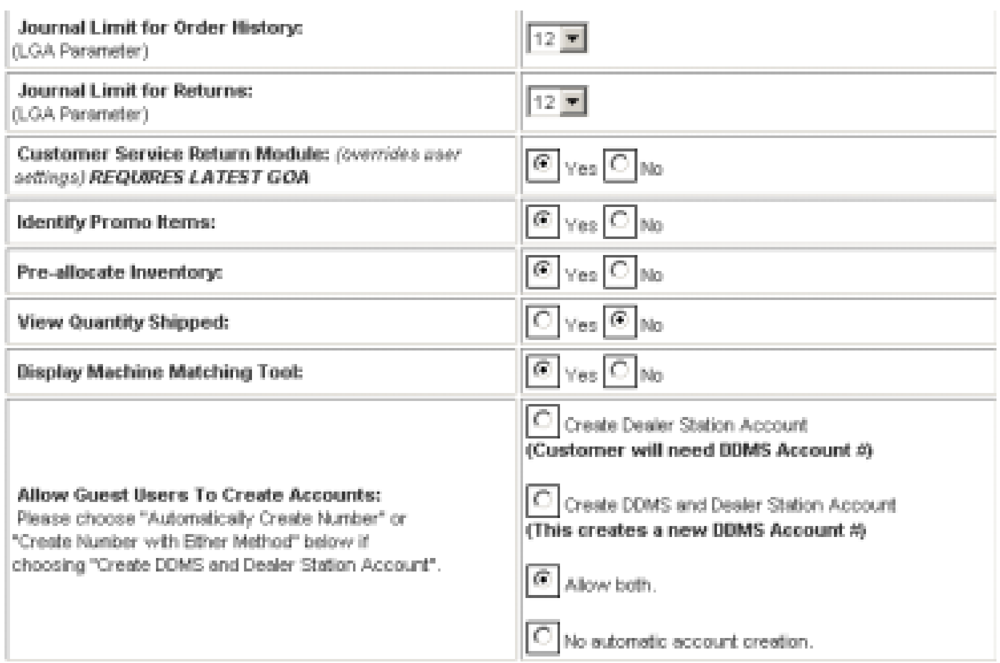
The second portion of the window shows the Journal Limit for Order History Identify Promo Items through Allow Guest Users To Create Accounts boxes, as shown in Figure 5-2. These boxes are in the order they appear in the window.

- **Journal Limit for Order History (LGA Parameter):** This displays the number of months users can view their order history. The (LGA) parameter is the sales journal location.
- **Journal Limit for Returns (LGA) Parameter:** You can limit how far back a customer may request a credit return on an item. You can set a value of 0 through 12 in this box. Historical sales journals beyond the limit are not searched.
- **Customer Service Return Module (overrides user setting):** You can enable the Return Request module. Click Yes to let the end-user enter items previously purchased for return / pick-up. Once you accept, the dealer processes a credit against the purchase using the same payment type as the original purchase invoice. For more information see **Chapter 22: Setting Up Return Requests.**

- **Identify Promo Items:** This flags items on sale flyers set up in your system. If you set this option to Yes, items on a sale flyer appear in green and the words Promo Price appear under the price. If you set this option to No, prices appear in red and the words Your Price appear under the price.
- **Pre-Allocate Inventory:** Click Yes to allocate items from the inventory as they are placed on the order. Click No to allocate items once the order is submitted.
- **View Quantity Shipped:** You can let users view the shipped quantity in the shopping cart and the checkout page. Click Yes to display the quantity to be shipped to the customer, based on quantity on-hand. Click No to hide the quantity shipped. Sub-totals are based on this quantity, rather than the desired quantity.
- **Display Machine Matching Tool:** The machine matching tool lets the user select a machine and then purchase parts for that machine from a list of parts that matches that machine. Click Yes to enable machine matching.
- **Allow Guest Users to Create Accounts:** Choose the kind of account guest users can create, or you can keep guest users from creating any accounts.

Note: When guest users request an account and complete the information, this information is sent to you via email.

Figure 5-2: The Journal Limit for Order History through the Allow Guest Users To Create Accounts Boxes



- **Create Dealer Station DDMS Edition Account:** This prompts the user for any necessary information, in addition to their valid DDMS account number, telephone number and zip code. If the account number, telephone number and zip code are validated, the user account is established in the web server and pointed to the DDMS account.
- **Create DDMS and Dealer Station Account:** This prompts the user for all necessary information, in addition to that required to establish an account in the DDMS back-office system. Once the information is submitted, the user account is established in the web server and a DDMS account is created.
- **Allow Both**: This allows the user to create a Dealer Station account with an existing DDMS account or create a Dealer Station account and a DDMS account.
- **No Automatic Account Creation**: Do not allow guest users to create accounts.

The third portion of the window shows the Allow New Users to Select Their User Type through View Quantity on Hand boxes, as shown in Figure 5-3. These boxes are in the order they appear in the window.

- **Allow New Users to Select Their User Type:** You can let end-users select their own user type. User types are set up in Default User Settings. To allow users this option, click Yes.
- **Hide Credit Card Info Request on New User Creation:** Click Yes to hide the request for credit card information when creating a new customer. Click No to display it.
- **Create New Customer Account and Department:** Choose how to create account and department numbers.
    - **Automatically Create Number:** This prevents number duplication and is the default response.
    - **Manually Create Number:** You can manually create customer or department account numbers.
    - **Create Number with Either Method:** You can choose to manually create an account number, or to have the number automatically created.
- **Show Association Code at New User Sign up**: You can create codes to track your new users. Specify whether to display this association code at the new user sign up. Click Yes to show the association code (default). Click No to hide it.

- **Item Description Displayed on Results Page:** Choose how to display the item descriptions.
  - **Long Description:** This displays a detailed description of the item.
  - **Short Description:** This displays a summary of the item.
  - **Both:** This displays both types of descriptions.
- **Display Available Budget:** Indicate whether to allow a customer's available budget to display on the end-user's home page.
- **Identify Contract Items:** This flags items on a contract. If you set this option to yes, the item price displays in blue and the words Contract Price display under the price. If you set this option to No, the item price displays in red with the words Your Price displayed under the price.
- **View List Prices:** Click Yes to let end-users view an item's list price from the (E) screen (Item Window). Click No to deny all your end-users access to item list pricing. Remember, if you set this option to No, all your end-users are denied access. To allow some end-users to view list pricing, click Yes, and limit the users who can view list pricing on an individual basis.

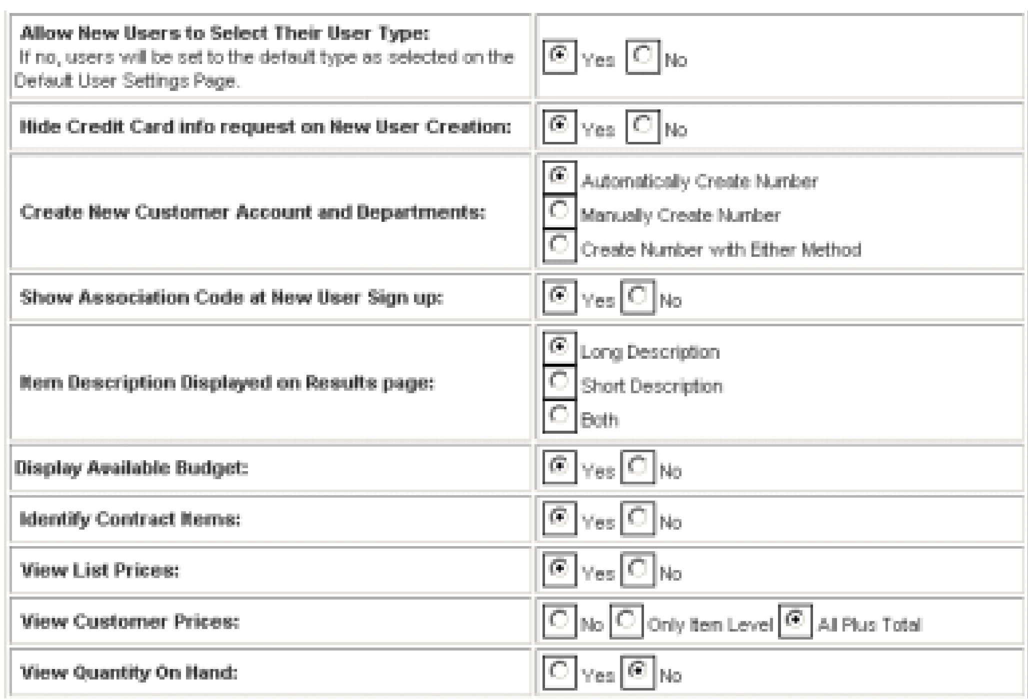


Figure 5-3: The Allow New Users to Select Their User Type through View Quantity on Hand Boxes

- **View Customer Prices:** This option works with the Display Order Discount option. You can let end-users view customer pricing. You have three choices: Click No to prevent all end-users from viewing customer prices. Click Only Item Level to display only the net price of the item. However, if you use this option and set the Discount Order Discount option to Yes, the order also shows the total list price and the discount amount. Click All Plus Total to display the list price and the total price of an item. This option defaults to the All Plus Total option.
- **View Quantity On Hand:** Click Yes to let users view on-hand item quantities from the (E) screen (Item Database). To deny all end-users access to on-hand quantities, click No. Remember, if you set this option to No, none of your end-users can view on-hand quantities. To allow some to view on-hand quantities, set this option to Yes, and limit the users who can view on-hand quantities on an individual basis.

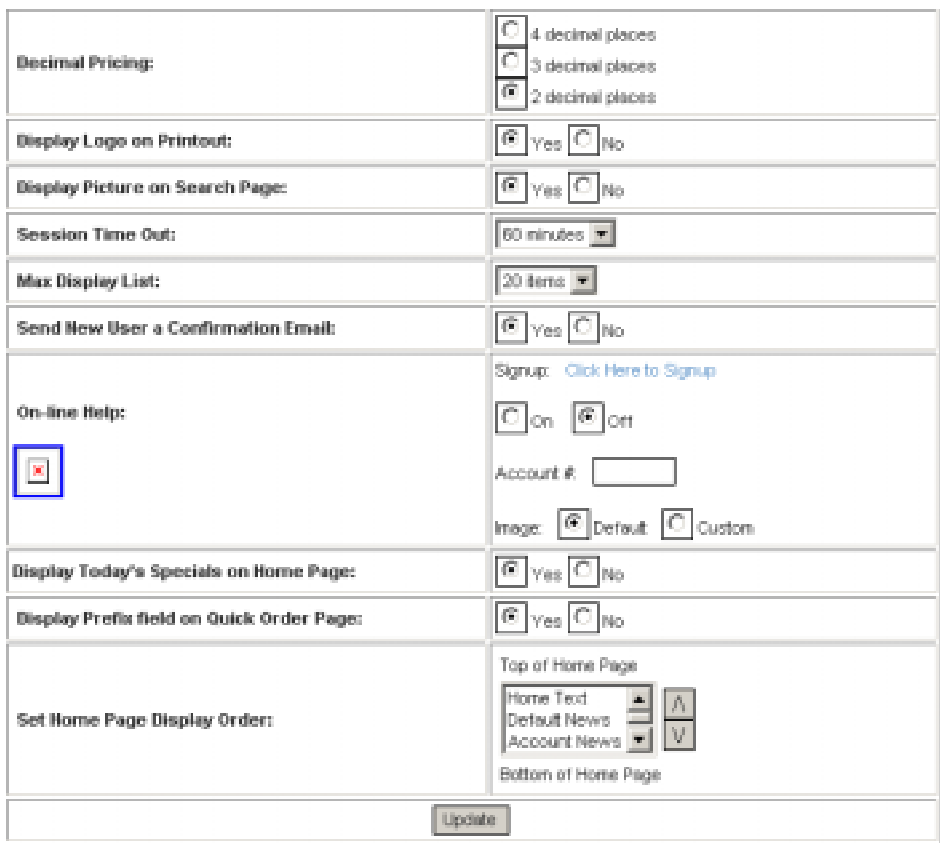
The last portion of the window shows the Decimal Pricing through Set Home Page Display Order boxes, as shown in Figure 5-4. These boxes are in the order they appear in the window.

- **Decimal Pricing:** You can display pricing in two, three or four decimal places. To figure the pricing to three decimal places, for example, 21.886, click 3 Decimal Places. If you select four decimal places, a zero is added to the end of the price to create the four decimal pricing. Use this feature if you already use the three decimal feature on the DDMS system.
- **Display Logo on Printout:** Click Yes to print your company logo on the customer's printed orders. This option defaults to print your company logo. To print the customer's orders without your logo, click No. This prints a blank heading on the end-user's order.
- **Display Picture on Search Page:** Click Yes to display the thumbnail picture of the item on the Search page.
- **Session Time Out:** Set the number of minutes a user can be inactive before they are logged off. Once the user reaches the time limit, a message explains the user has been logged off and any open orders are on hold.
- **Max Display List:** Set the number of laundry list items that must be set up to display the laundry list menu. For example, you can specify that fewer than 10 laundry list items would not appear in a laundry list menu. Instead, all the items would appear in a single line. However, if you set up more than 11 laundry list

items, the items would appear under a menu, making it easier for the end-user to identify all the items. Click the down arrow and select the number of items you allow before a menu appears. The default is 20.

- **Send New User a Confirmation Email:** You can email confirmation of a new user's Dealer Station DDMS Edition account. Email text is set up in the New User Email Text box in Site Text. See **Chapter 2: Site Text**.
- **On-Line Help:** Indicate whether to activate the LivePerson feature. Click the LivePerson logo or select the Click Here To Sign-up link. When the LivePerson web page opens, enter your information in the LivePerson Pro free trial boxes. LivePerson automatically creates an account for you. Note your account number. Once your account is created, you can download and install the software. (For more information, see the Liveperson web site). To enable LivePerson, click On. Enter your LivePerson account number in the account number box.

Figure 5-4: The Decimal Pricing Through Set Home Page Display Order Boxes



- **Display Today's Specials on Home Page**: Indicate whether to display today's specials on the customer's home page.
- **Display Prefix field on Quick Order Page**: Indicate whether you want to display the Prefix field on the end-user's Quick Order page. If you set this option to No, the Prefix field does not appear, and the system requires the user to enter both the prefix and the item number in the Item Number field without any spaces, PPP33311, for example. If you set this option to Yes, the Prefix field does appear on the end-user's Quick Order Page.
- **Set Home Page Display Order**: You can customize the order of the end-user home page news. There are four types of information you can add to the user's home page: system news, home text, account news, and today's specials. This box lets you specify the order in which items appear on the home page. To display the Default News first, highlight Default News and use the up arrow on the right side of the box to move Default news to the top of the list. To move a news type down, use the down arrow. Once you have placed the news types in the order you want them to appear, click Update.

4 When you finish, click Update. If you exit this window without clicking Update, your changes are not saved. To return to the Dealer Station DDMS Edition Administrative Control Panel, click Admin Home.

Chapter 6: Checkout Preferences

Contents

Using Checkout Preferences

You can set preferences or parameters for end-users once they complete an order and are ready to checkout. These parameters affect the Checking Out page. You can customize the text on this page, select credit card payment options and determine the information available to view.

1. Log into the Dealer Station DDMS Edition Administrative Control panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station DDMS Edition.**
2. After the Dealer Station DDMS Edition Control Panel opens, click 

.
3. The Dealer Station-Checkout Preferences window opens. The window is divided into sections. When you finish changing information, click Update. If you exit this window without clicking Update, your changes are not saved.

Checkout Preferences

The Checkout Preferences section includes the Checkout Title through Submit Order Button Text boxes. Use these boxes to customize the checkout page. See Figure 6-1.

- **Checkout Title:** Use this box to customize the text that appears at the top of the checkout page.
- **Continue Shopping Link:** Customize the text for the link at the bottom of the checkout page. This link takes the end-user back to browsing the catalog for further shopping.
- **Attention Title:** Use this box to customize the text that appears next to the Attention name box.
- **Shipping Instructions Title:** Use this box to customize the text that appears next to the Shipping Instructions box at the bottom of the page.
- **PO Title:** Use this box to customize the text that appears next to the PO# box.
- **Shipping and Handling Text:** Use this box to change the Shipping & Handling text. For example, yours might say “Minimum Order Charge.”
- **Display Shipping Instructions:** Click Yes to let end-users add shipping instructions.
- **Display PO:** Click Yes to display the P/O number on the end-user’s web site.

- **Display Attention:** Click Yes to display the Attention on the end-users web site.
- **Display Credit Card Approval Code**: Indicate whether to display the user's credit card approval code on the order summation page and printed copies of the order once the order is complete. To display the approval code, click Yes. To hide it, click No. You must have POS Partner and Approval Link 2 for this box to work.
- **Display Order Discount:** You can let users view the discount amount for the entire order on the web site or in emails or not at all. This information comes from the Disc Type box in the Order Entry Tab for the customer in the Customer database. To allow users to view the discount amount on the web site only, click Yes. To allow users to view the discount amount in emails and the web site, click All Plus Emails. To deny all your end-users the ability to view the discount amount, click No.
- **Accept Credit Cards:** To your end-users to place credit card orders, click Yes. To prevent all your end-users from placing credit card orders, click No. Remember, if you set this option to No, none of your end-users can place credit card orders. To allow

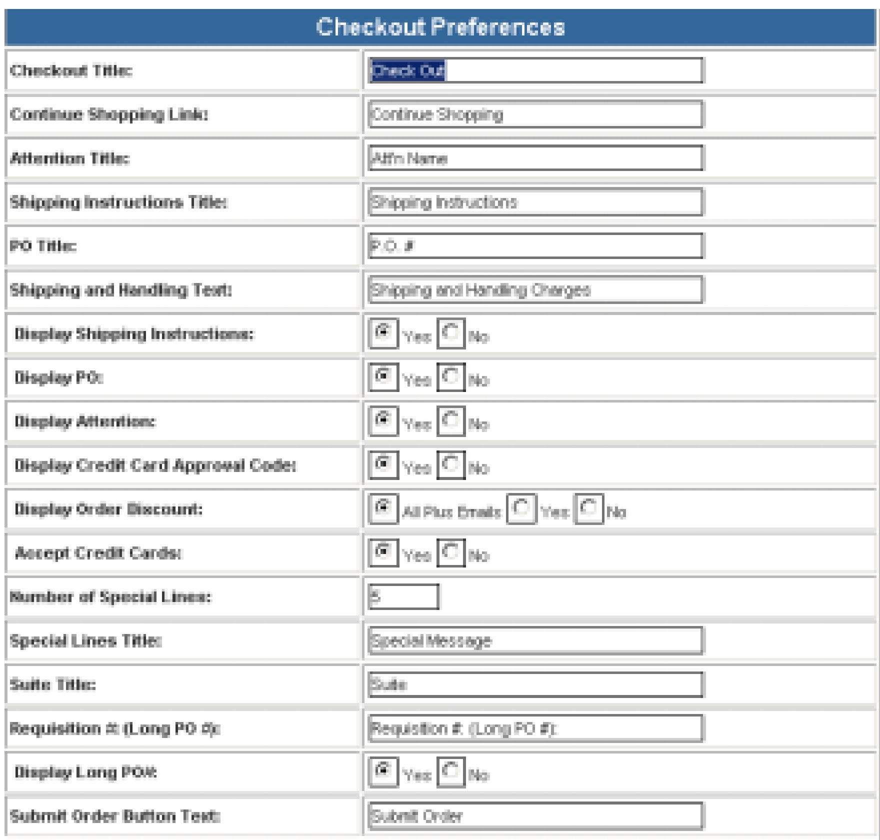
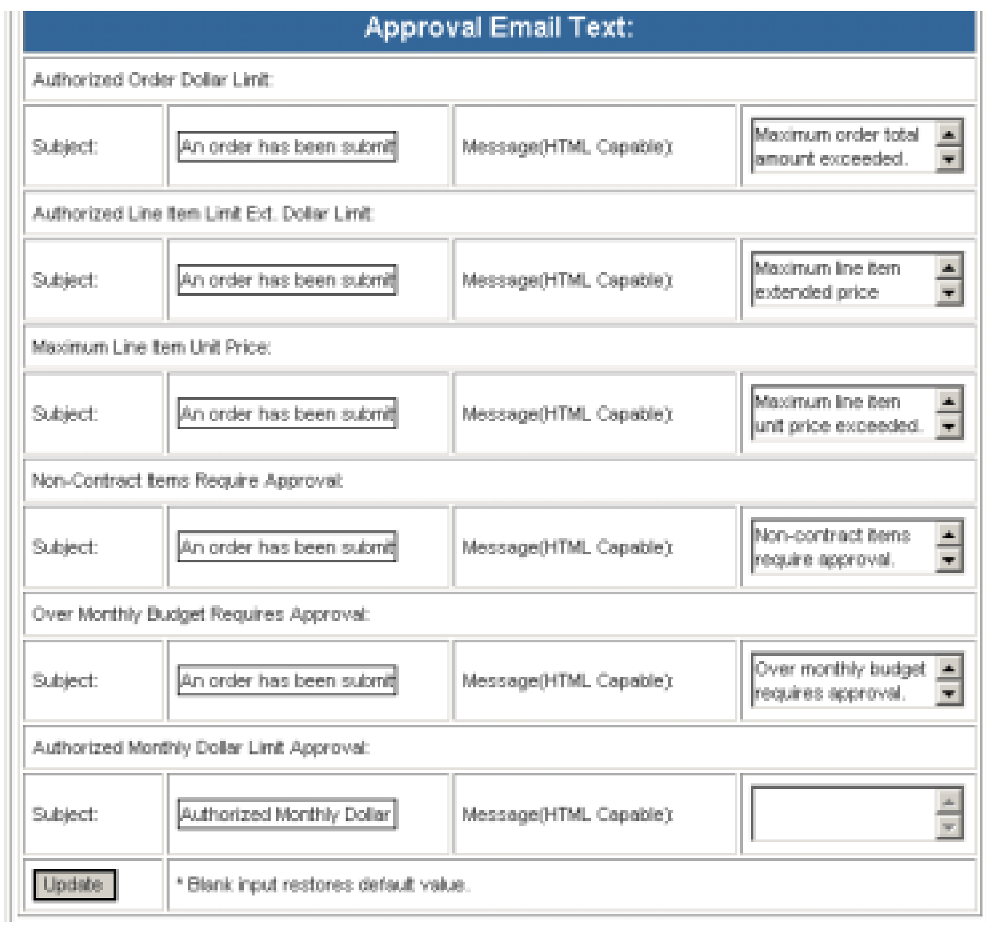


Figure 6-1: The Dealer Station-Checkout Preferences Boxes

some to place credit card orders, set this option to Yes, and limit the users on an individual basis. If you select Yes, select the credit cards to allow your end-users to use in the Choose Payment Options box at the bottom of this window.

- **Number of Special Lines:** Indicate the number of special message lines you make available on the checkout page.
- **Special Lines Title:** Customize the text that appears next to the special message lines.
- **Suite Title:** Use this box to customize the text for the additional information line. This box displays under the Name box for the end-user to add additional information about their name or an additional address.
- **Requisition # (Long PO#):** Use this box to customize the information that appears next to the Long Purchase Order box. For example, you can shorten the name of this box to Long PO#.

Figure 6-2: The Approval Email Text Boxes



- **Display Long PO#:** Click Yes to display the requisition or long P/O number on the end-user's web site.
- **Submit Order Button Text:** Use this box to change the text on the Submit button.

Approval Email Text

The Approval Email Text section includes several Subject and Message boxes, as shown in Figure 6-2.

These boxes let you customize the approval email subject line and the email text. You can enter text or HTML script in this box. For example, you could change the text in the first Subject box from Authorized Order Dollar Limit Email to Order Dollar Limit Email.

1 Click each box to change and enter the new text over the existing text.

2 When you finish, click Update. The changes immediately appear on the end-user's web page.

Custom Error Text

The Error Text section includes the Held, Due to Over Monthly Budget through Exceeded Monthly Dollar Limit boxes, as shown in Figure 6-3.

These boxes let you customize the error messages that appear on the end-user's web page. You can enter text or HTML script in this box. For example, you could change the text Order Held Due To Dealer Host System to The Order Has Been Placed On Hold Because You Have Exceeded Your Monthly Budget Amount.

1 Click each box to change and enter the new text over the existing text.

2 When you finish, click Update. The changes immediately appear on the end-user's web page.

Checkout Text

Use this box to customize the text that appears above the menu bar in the checkout page. See Figure 6-3. You can use HTML in this box.

1 To change the text, click anywhere in the Checkout Text text box. Enter the new text over the existing text.

2 When you finish, click Update. The site is updated immediately.

Credit Card Approved Text

You can customize the text that displays when a customer's credit card is approved during a credit card transaction. See Figure 6-3. You can use HTML in this box.

Note: You must have POS Partner and Approval Link 2 for this box to work.

---

1 To change the text that appears when there is an approval, click anywhere in the Credit Card Approved text box. Enter the new text over the existing text.

2 When you finish, click Update. The site is updated immediately and the text displays when a credit card is approved.

Credit Card Declined Text

You can customize the text that displays when a customer's credit card is declined during a credit card transaction. See Figure 6-3. You can use HTML in this box.

Note: You must have POS Partner and Approval Link 2 for this box to work.

1 To change the text that appears when the credit card is declined, click anywhere in the Credit Card Declined text box. Enter the new text over the existing text.

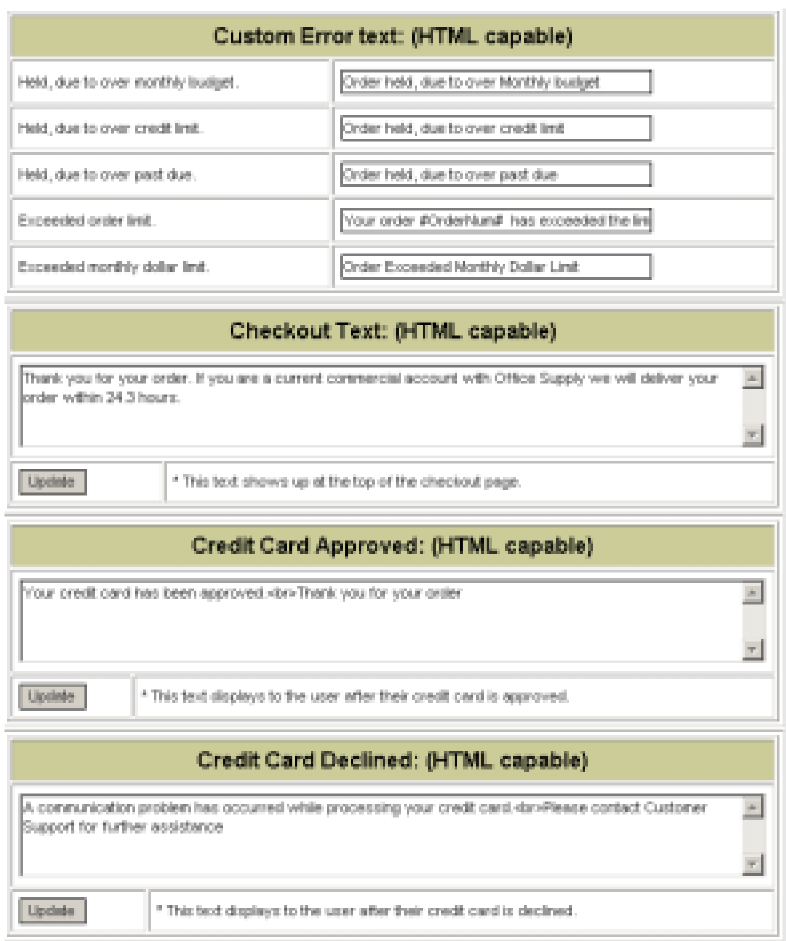


Figure 6-3: The Custom Error text, Checkout Text, Credit Card Approved and Credit Card Declined Boxes

2 When you finish, click Update. The site is updated immediately and the text displays when a credit card is declined.

Credit Card Pending Approval Text

You can customize the text that displays when a customer's credit card is pending approval during a credit card transaction. See Figure 6-4. You can use HTML in this box.

Note: You must have POS Partner and Approval Link 2 for this box to work.

---

1 To change the text that appears when the credit card is pending approval, click anywhere in the Credit Card Pending Approval text box. Enter the new text over the existing text.

2 When you finish, click Update. The site is updated immediately and the text displays when the credit card is pending approval.

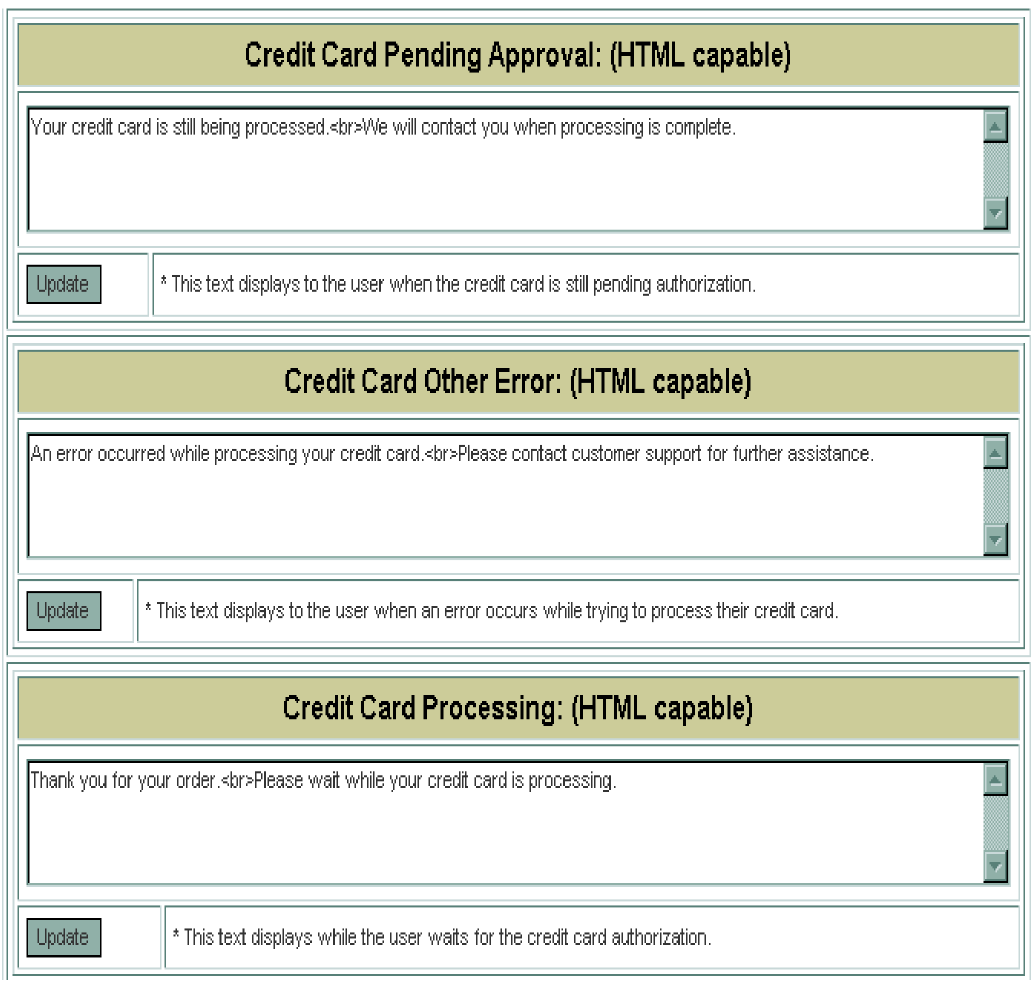


Figure 6-4: The Credit Card Pending Approval, Credit Card Other Error and Credit Card Processing Boxes

Credit Card Other Error Text

You can customize the text that displays when there are other errors during a credit card transaction. See Figure 6-4. You can use HTML in this box.

Note: You must have POS Partner and Approval Link 2 for this box to work.

1 To change the text that appears when other errors occur, click anywhere in the Credit Card Other Error text box. Enter the new text over the existing text.

2 When you finish, click Update. The site is updated immediately and the text displays when other errors occur during a transaction.

Credit Card Processing Text

You can customize the text that displays when a customer's credit card is being processed. See Figure 6-4. You can use HTML in this box.

Note: You must have POS Partner and Approval Link 2 for this box to work.

1 To change the text that appears when the credit card is processing, click anywhere in the Credit Card Processing text box. Enter the new text over the existing text.

2 When you finish, click Update. The site is updated immediately and the text displays when the credit card is processing.

- **Choose Payment Options:** This box, shown in Figure 6-5, displays all the credit card types you accept, such as Visa, Master Card, American Express, and so on. The credit cards you currently accept are highlighted in this box. You can select more than one credit card from the displayed list. To do so, hold down the Ctrl key while clicking each credit card that you accept. Each credit card you click is highlighted. If you make a mistake, hold the Ctrl key down while clicking the credit card again to deselect it.

Figure 6-5: The Choose Payment Option Box

Chapter 7: Catalog Management

Contents

Using Catalog Management

The Catalog Management feature lets you choose the catalogs users can search when browsing for an item. You can choose from a master list of catalogs and click the ones you want. You can also customize the names of the catalogs.

Use the following instructions to set up catalogs for the user:

1 Log onto the Dealer Station DDMS Edition Administrative Control panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station DDMS Edition.**

2 After the Dealer Station Control Panel opens, click Catalog Management.

3 The Catalog Management web page opens, as shown in Figure 7-1.

4 A list of catalogs displays. You can choose the catalogs for your users from this list. To select a catalog, click the box in the Search On column corresponding to the catalog. A checkmark displays in the box.

Note: You can select as many as you want. To deselect a catalog, click the box again. The checkmark no longer displays in the box.

---

5 You can also change the name of the catalog. Highlight the text in the Custom Name box next to the catalog to change. Enter the new name over the old name.

6 Set up catalog search priority in the Set Catalog E-Content Priority box. This the order in which the system searches for items. Click the catalog to move and click the up and down arrows to place it in the right order.

7 When you finish adding catalogs and making changes, click Update. The user’s web site is immediately updated.

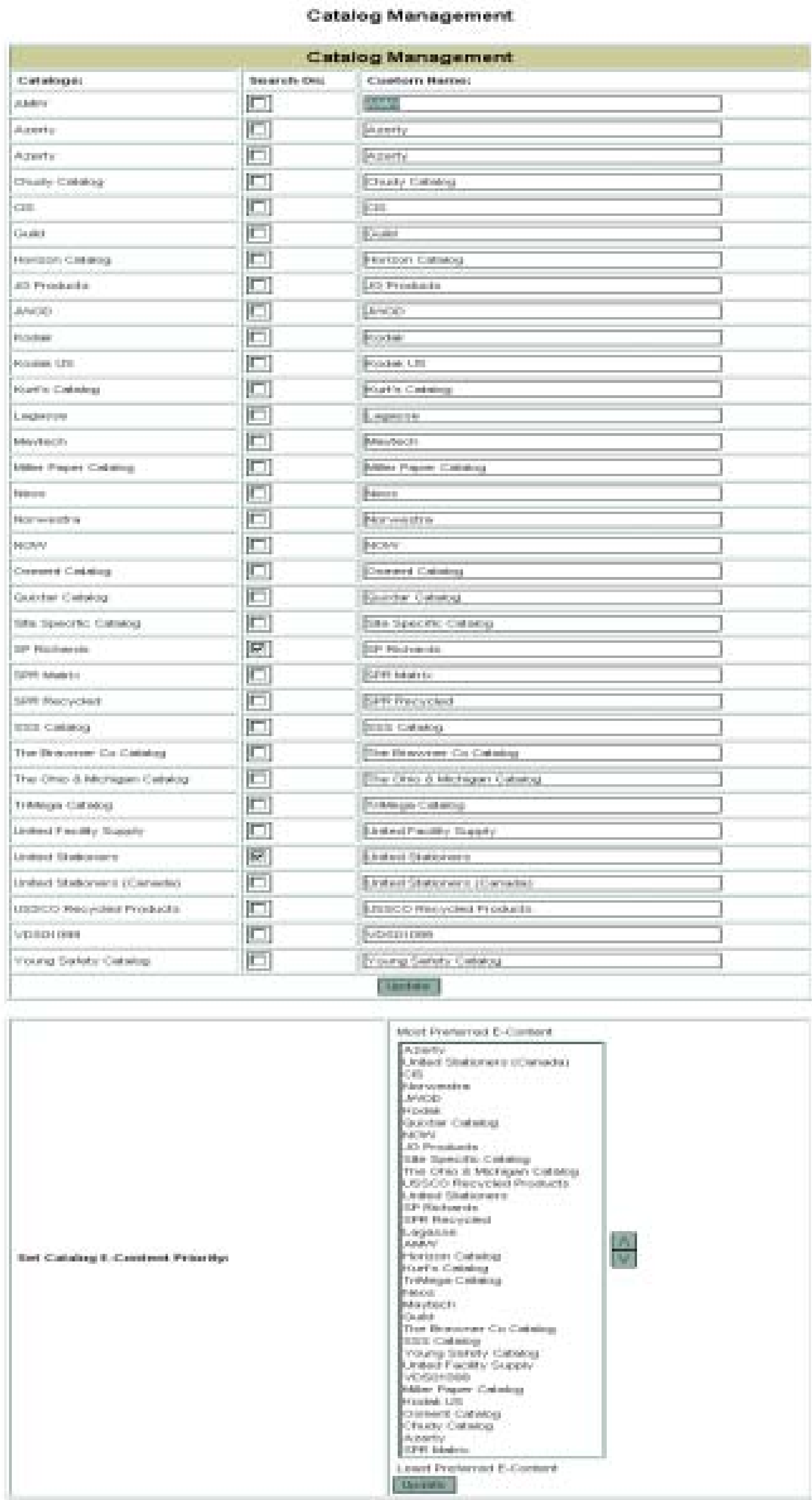


Figure 7-1: The Catalog Management Window

Chapter 8: Rewards

Contents

Using Rewards

The Rewards tool lets you have an end user point and reward system. End users earn points and use them to receive rewards that you set up. You can specify multiple reward identities that determine user dollar to point ratios, and assign them to users. You can display a catalog of item rewards. Another feature lets you enter contact information. This helps your end-users know who to contact concerning their rewards. When using the Reward Account History Page, you and the end-user can view account-specific reward credits and debits.

After you set up reward identities using this page, you can assign them to your end users. You do this using the User Able to View Reward Catalog and Default Reward Identity boxes in the Default User Settings and User Accounts pages. For details, see **Chapter 9: Default User Settings** and **Chapter 10: User Accounts**.

Use the following instructions to begin using rewards:

1. Log onto the Dealer Station DDMS Edition Administrative Control panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station DDMS Edition.**
2. After the Dealer Station Control Panel opens, click 

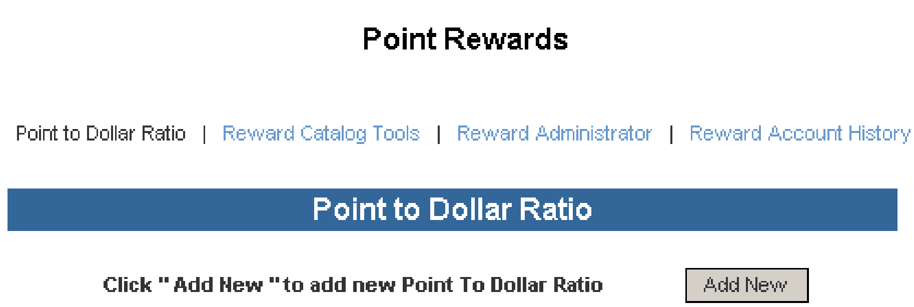
.
3. The Point Rewards web page opens, as shown in Figure 8-1. At this point, you can add a dollar amount to point ratio reward, use the reward catalog tool, enter reward administrator information, or view reward account history.

Adding a Point to Dollar Ratio Reward

This tool lets you create multiple reward identities by entering a dollar amount and point ratio for the reward you want to assign. After the reward is set up, you can assign it to your end-users.

1. Click Add New.

Figure 8-1: The Point Rewards Page



2 The Point to Dollar Ratio web page opens. Enter your responses in the following boxes:

To delete an existing Dollar to Point Ratio Reward, click the Delete button corresponding to the reward you want to remove.

- **Reward Name:** Enter the name of this reward. You can enter up to eight alphanumeric characters in this box.
- **Dollars:** You use this box to enter a dollar amount that the customer must meet in order to gain the point(s) reward. Suppose a customer must place an order of $1000.00 to earn 10 points. In this case, you would enter 1000 in the Dollars box, 10 in the Points box. Click the Dollars box and enter the dollar amount.
- **Points:** Enter the point amount that this end-user receives for placing an order at or above the specified dollar amount.

3 When you finish, click Add.

4 The cursor returns to the Point to Dollar Ratio main page, displaying the reward you added, as shown in Figure 8-2. To add another reward, click Add New. You can continue to set up as many dollar and point ratios as necessary.

Using the Reward Catalog Tool

This tool lets you use the catalog to specify item information which can earn the end user points.

1 Click the Reward Catalog Tools link.

2 The Reward Catalog Tools Page opens, as shown in Figure 8-3. Enter the stock number of the item for which you are setting up a reward.

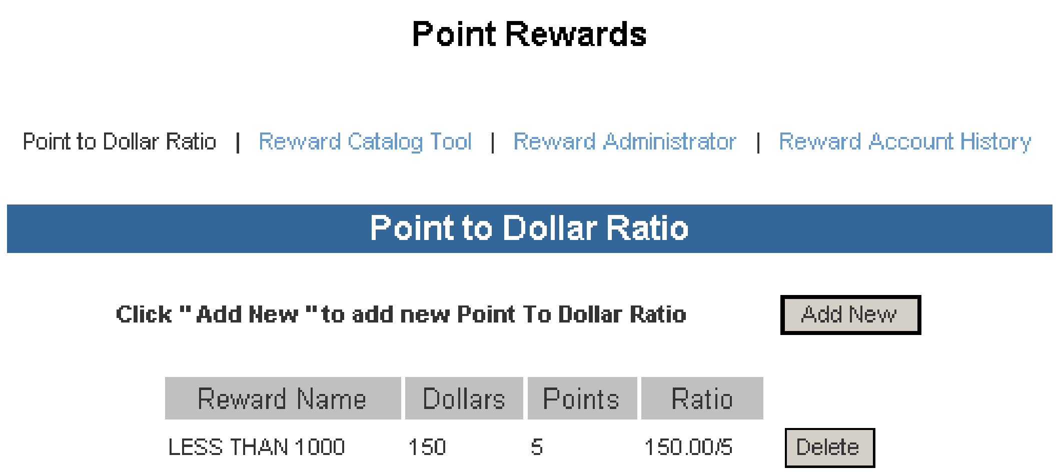


Figure 8-2: The Point to Dollar Ratio Page

3 When you finish entering the item number, click Add Item.

4 The system displays the item you specified in the Item box, and the cursor moves to the Short Description box. Enter your responses in the following boxes:

- **Short Description:** Enter a short description of the item for which you are setting up a reward.
- **Long Description:** Enter a long description of the item for which you are setting up a reward.
- **Category:** Enter a descriptive category name to which this item belongs, Hardware or Electronics, for example.
- **Point Value:** Enter the number of points that this end-user will receive for placing this item on the order.

5 When you finish entering item information, click Done. The Changes Were Made to the Database message appears.

6 At this point, you can also add a picture for the item. You can specify to add a full size image or a thumbnail image. The file you select must be either a .jpg or .gif file. In the Full Size Image or Thumbnail Image section of the window, click Browse and locate the item to upload.

To delete an existingreward catalog item, click the Delete button corresponding to the reward you want to remove.

Note: The maximum size for your logo depends on the template you chose earlier. For more information, see **Chapter 4: Site Style**.

---

7 When the appropriate item is selected, click Upload.

8 When you finish uploading the image, click Finished.

9 The cursor returns to the Item box, so you can continue to add as many items to the catalog as needed.

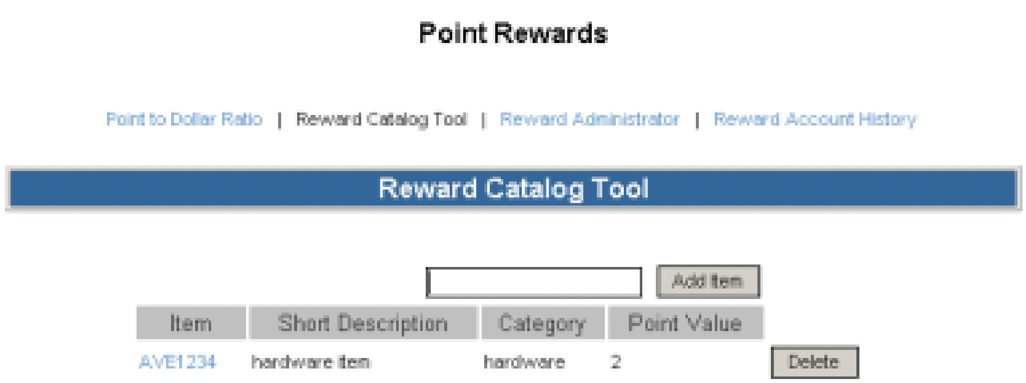


Figure 8-3: The Reward Catalog Tools Page

Entering Reward Administrator Information

This tool lets you enter information for a specific reward administrator. The reward administrator over-sees the reward system. All orders and issues related to rewards will be forwarded to this individual within your company. In addition, the administrator you specify will be used as the contact person when your end users have questions concerning the reward system.

1 Click the Reward Administrator link.

2 The Reward Administrator Page opens, as shown in Figure 8-4. Enter your responses in the following boxes:

   - **First Name:** Enter the first name of the reward administrator.
   - **Last Name:** Enter the last name of the reward administrator.
   - **Email Address:** Enter the email address for the reward administrator. This is the email address that will display as the contact on the end-user's site when making reward system inquiries.
   - **Phone No:** Enter the telephone number of the reward administrator. This is the number that will display as the contact on the end-user's site when making reward system inquiries.

3 When you finish entering the administrator's information, click Submit.

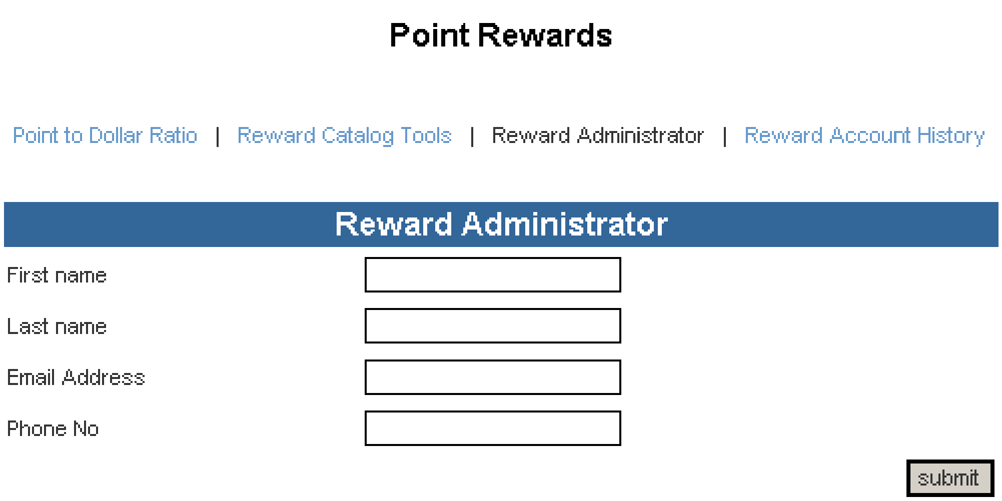


Figure 8-4: The Reward Administrator Page

Viewing Reward Account History

This tool lets you view any credits and debits pertaining to your end-user's account.

1. Click the Reward Account History link.
2. The Search for Users Page opens. Enter the information for the end-user for which you want to view reward history and click Submit Search.
3. The Search Result Page opens, displaying the account number, full name, along with the points credited and points debited.

Chapter 9: Default User Settings

Contents

Using Default User Settings

You can use the Default User Settings feature to select each of the user's default settings and privileges. These defaults are used for every user added to the system. You can set up multiple default user settings.

Creating Multiple Default User Types

You can create multiple default user settings. You can customize and save default user settings for any type of customer, for example, by region, pricing contract, etc. You can also customize by user level. You can add new types, rename types and remove types. You can set a default type so that each added user defaults to that setting, unless otherwise changed. Use the following instructions to set up multiple default user settings.

Adding a New Type

1. Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.
2. After the Dealer Station Control Panel opens, click Default User Settings.
3. Enter a unique name in the User Type Name box for the default user type you are creating. See Figure 9-1.
4. Set the parameters for this user type. For more information about the boxes, see **Completing the Default User Settings Boxes**.
5. When you finish setting parameters, click Add New Type.
6. The user type is added. A confirmation or error message displays at the top of the window.

Renaming a Type

1. Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.
2. After the Dealer Station Control Panel opens, click Default User Settings.
3. From the Select User Type drop down list box, select the user type to rename. See Figure 9-1.

4 Click Go to open the user type you selected. If you do not click Go, the user you selected does not display.

5 Type the new name in the User Type Name box.

6 Click Rename Type.

7 A confirmation or error message displays at the top of the screen.

Removing a Type

1 Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

2 After the Dealer Station Control Panel opens, click


.

3 From the Select User Type drop down list box, select the user type to delete. See Figure 9-1.

4 Click Go to open the user type you selected. If you do not click Go, the user you selected does not display.

5 Click Remove Type.

6 A confirmation or error message displays at the top of the window.

Note: You cannot delete the default user type.

Setting a Default User Type

1 Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

2 After the Dealer Station Control Panel opens, click


.

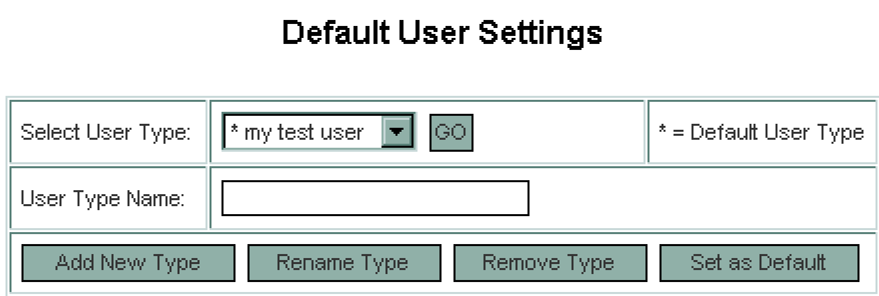


Figure 9-1: Setting Up Multiple Default User Settings Window

3. From the Select User Type drop down list, select the user type to set as the default.
4. Click Go to open the user type you selected. If you do not click Go, the user you selected does not display.
5. Click Set As Default. See Figure 9-1.
6. The user type you selected becomes the default. A confirmation or error message appears at the top of the window.

Completing the Default User Settings Boxes

Use the following instructions to set up your default user settings:

1. Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.
2. After the Dealer Station Control Panel opens, click

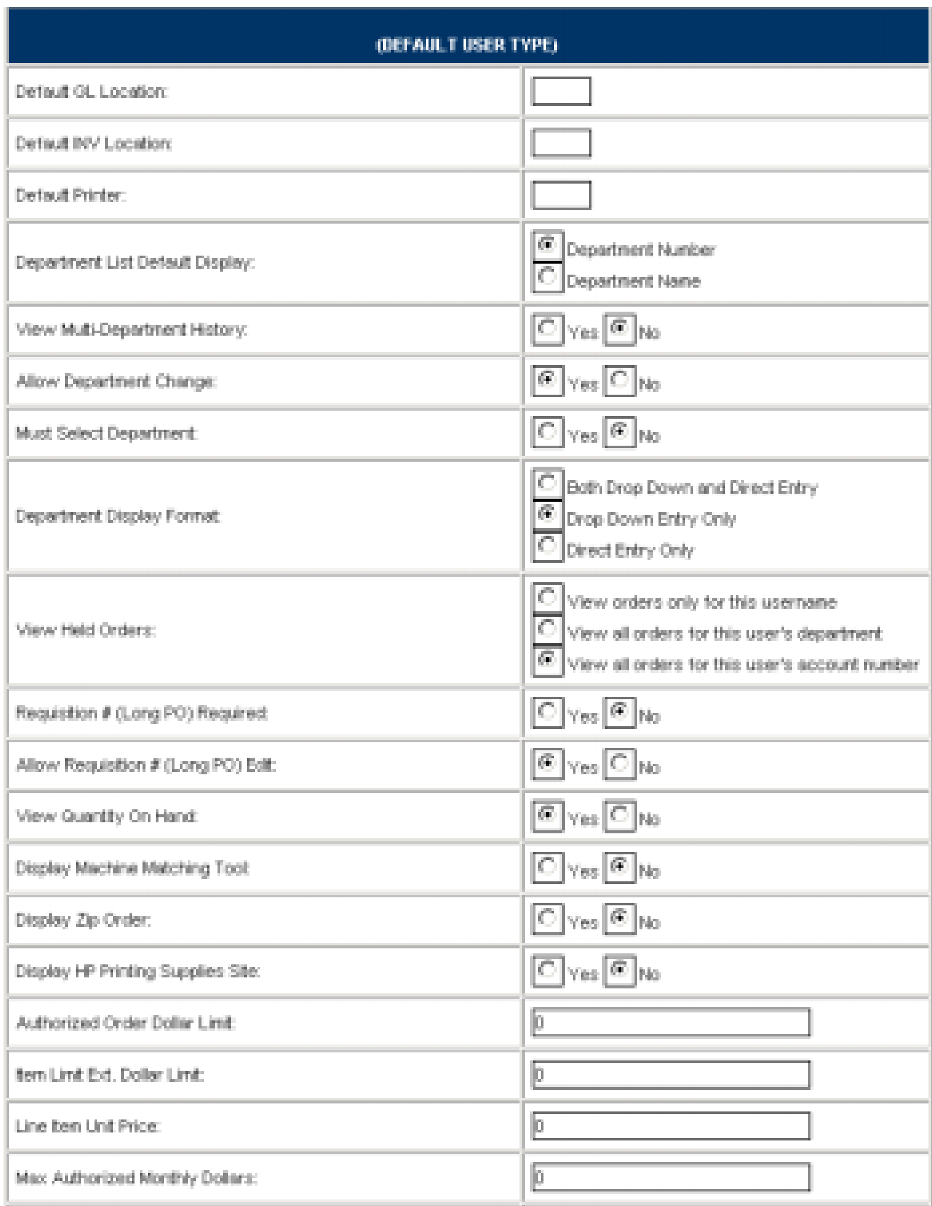

.
3. The Default User Settings window opens. You can add information to or change information in any box. When you finish, click Update. If you exit this window without clicking Update, your changes are not saved. To return to the Dealer Station DDMS Edition Administrative Control Panel, click Admin Home.

   The first portion of the window shows the Default GL Location through Max Authorized Monthly Dollars boxes, as shown in Figure 9-2**.**

   - **Default GL Location:** Enter the DDMS G/L location for this user if you are live on general ledger and have multiple general ledger locations. If you leave this box blank, the default location set in the Loc field in the (L1) Terminal and Ticket Parameters screen for the Dealer Station DDMS Edition port is used.
   - **Default INV Location:** If you have multiple locations, enter the inventory location to use to fill this user's orders. If you leave this box blank, the default location set in the Loc field in the (L1) screen for the Dealer Station DDMS Edition port is used.
   - **Default Printer:** Enter the name of the printer to print the pick tickets. Enter this name in upper case characters, P1, for example, and not p1. The printer you specify must be set up on the DDMS system.

     If you leave this box blank, the default printer settings entered in the T-I-C-K-E-T-S P field in the (L1) screen for the Dealer Station port are used. If you are unsure which terminal this is, call Support.

- **Department List Default Display:** Specify how you want the end user’s department list to display. You can display the list by department number or by department name. Click the option below.
  - **Department Number**: Display the department list by department number.
  - **Department Name**: Display the department list by department name.



(DEFAULT USER TYPE)	
Default GL Location:	
Default INV Location:	
Default Printer:	
Department List Default Display:	(●) Department Number ( ) Department Name
View Multi-Department History:	( ) Yes (●) No
Allow Department Change:	(●) Yes ( ) No
Must Select Department:	( ) Yes (●) No
Department Display Format:	( ) Both Drop Down and Direct Entry (●) Drop Down Entry Only ( ) Direct Entry Only
View Held Orders:	( ) View orders only for this username ( ) View all orders for this user's department (●) View all orders for this user's account number
Requisition # (Long PO) Required:	( ) Yes (●) No
Allow Requisition # (Long PO) Edit:	(●) Yes ( ) No
View Quantity On Hand:	(●) Yes ( ) No
Display Machine Matching Tool:	( ) Yes (●) No
Display Zip Order:	( ) Yes (●) No
Display HP Printing Supplies Site:	( ) Yes (●) No
Authorized Order Dollar Limit:	0
Item Limit Ext. Dollar Limit:	0
Line Item Unit Price:	0
Max Authorized Monthly Dollars:	0

Figure 9-2: The Default GL Location through Max Authorized Monthly Dollars Boxes

- **View Multi-Department History:** You can use this box to specify whether end users can view order history for all departments, without the necessity of changing departments or opening a separate window. Click Yes to allow this user to view order history for all departments. To prevent this user from viewing order history for all departments, click No.
- **Allow Department Change:** Specify whether the user can place orders for different departments, if the user has customer departments. To use this feature, this user must be set up with departments in the Dept field in the (A) screen (Customer Database) on the DDMS system. Click Yes to allow this customer to place orders for different departments. To prevent this user from placing orders for different departments, click No.
- **Must Select Department:** Specify whether to force the user to select a department when logging into the Dealer Station DDMS Edition home page, if this user has more than one department. If you set this option to Yes, the user must select a department, other than the default, before placing an order. If you do not want to force the user to choose a department before placing an order, click No. To use this feature, this user must be set up with departments in the Dept field in the (A) screen (Customer Database) on the DDMS system.
- **Department Display Format:** Specify the methods by which the user can select departments when placing orders, if the user has more then one department. Click the option to allow this user.
  - **Both Drop Down and Direct Entry**: Users can either select the department from a drop down list, or enter the department code manually.
  - **Drop Down Entry Only**: The user can choose from a drop down list, but cannot enter a department code.
  - **Direct Entry Only**: Users must enter the department code manually. The drop down list box does not appear.
- **View Held Orders:** Specify the orders this user can view. (This options refers to held orders.)
  - **View Orders Only for this Username:** This user can only view the orders he has placed (orders created with his user name).
  - **View All Orders for this User's Department:** This user can view all orders placed for his department within the company. (This includes orders this user has placed, and any additional orders placed for his department by different company users.)

- **View All Orders for this User's Account Number:** The end-user can view all orders placed for his company's account number. (This includes orders this user may have placed and any additional orders created by other company users. This also includes all orders placed for various departments within the company, if applicable.)

- **Requisition Nbr (Long PO) Required:** Indicate whether to require the Requisition # (Long P/O) to check out. If you select No, the Requisition # does not appear on the Checkout Page.
- **Allow Requisition Nbr (Long PO) Edit:** Specify whether to allow the user to make changes to the Requisition # (Long P/O) on the Checkout Page.
- **View Quantity On Hand:** Specify whether this user can view on-hand item quantities from the (E) screen (Item Window).
- **Display Machine Matching Tool:** Choose whether to make the Machine Matching Tool option available to your end-users. The machine matching tool allows the user to select a machine and then purchase parts for that machine from a list of parts that matches that machine.
- **Display Zip Order:** Indicate whether you want to make the Zip Order feature available to your end-users.
- **Display HP Printing Supplies Site:** Indicate whether you want to make the Hewlett Packard Printing Supplies site available to your end-users.
- **Authorized Order Dollar Limit:** *This box only applies if you are going through the Order Approval process. If you are not, enter Ø.* Enter a maximum (pre-tax) dollar limit for each order this user places. Enter the maximum dollar limit all in one string. For example, to place the maximum order limit at $20,000, enter 20000 in this box. The default for this box is $0. You must enter an amount for this user to be able to place orders.
- **Item Limit Ext. Dollar Limit:** This is the maximum item single unit sell price allowed for this user.
- **Line Item Unit Price:** This is the maximum extended line item value at the sell price that this user can purchase.
- **Max Authorized Monthly Dollars:** Enter a maximum total amount that end-users can place within a given month. If the user exceeds the monthly total amount, the system displays a warning message on the Checkout page. (This is a user level budget and will not conflict with an account-level or department-level budget.)

The second portion of the window shows the Non-Contract Items Require Approval through Out of Office Approval options, as shown in Figure 9-3**.**

- **Non-Contract Items Require Approval:** Indicate whether orders containing non-contract items need approval before submitting them. The person set up in the Approval Username box is the person who approves these orders.
- **Super User:** Specify whether this user has administrative rights for his customer account and the other users within his company. Click Yes to grant the user administrative rights. Click No to deny them. The Super User can add users and place them in specific departments. A customer without super user rights cannot add users.
- **Allow Super User to Set Non Contract Items Require Approval:** This box allows or denies super users the ability to set the Non-Contract Items Require Approval parameter for end users they create and maintain. Click Yes to grant the super user the ability to set and change this parameter. Click No to deny the super user the ability to set and change this parameter.

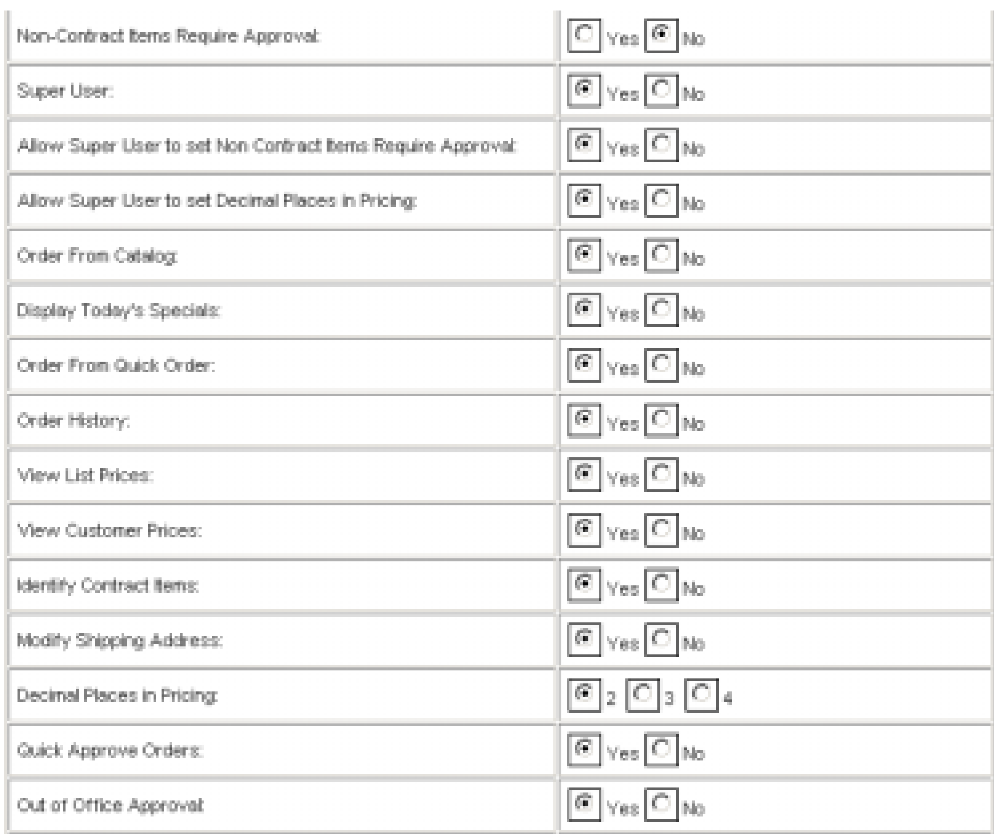


Figure 9-3: The Non-Contract Items Require Approval Through Out of Office Approval Boxes

- **Allow Super User to Decimal Places in Pricing:** This box allows or denies super users the ability to set the Decimal Places in Pricing parameter for end users they create and maintain. Click Yes to grant the super user the ability to set and change this parameter. Click No to deny the super user the ability to set and change this parameter.
- **Order From Catalog:** Specify whether this user can search for items using the online item catalog. Click Yes to let the user view and order items using the online item catalog. Click No to deny the user access. This parameter also affects favorites lists.
- **Display Today's Specials:** Specify whether to display Today's Specials on the end-user's site. For more information, see **Chapter 13: Today's Specials**.
- **Order From Quick Order:** This parameter enables and disables the Quick Order feature on the end-user's web site. Select Yes to let users order items using Quick Order. Select No to prevent users from ordering using Quick Order.
- **Order History:** Specify whether to let this user inquire on order history. Click Yes to let the user view order history. Click No to deny the user access.
- **View List Prices:** Indicate whether the user can view an item's list price from the (E) screen (Item Window). To allow this user to view item list pricing, click Yes. To deny this user to view item list pricing, click No.

Note: If you set the View List Prices option in the Site Preferences window to No, none of your users can view item list pricing. For any users to be able to view item list pricing, the View List Prices option in the Site Preferences window must be set to Yes.

- **View Customer Prices:** Specify whether the user can view customer pricing. To allow this user to view customer pricing, click Yes. To deny this user to view customer pricing, click No.
- **Identify Contract Items:** This identifies items on a contract. Click Yes to display the item price in blue with the words Contract Price under the price. Click No to display the item price in red with the words Your Price under the price.
- **Modify Shipping Address:** Specify whether this user can change the shipping address while placing orders.
- **Decimal Places in Pricing:** Specify whether this end-user can view pricing to two, three or four decimal places. For example, to display unit pricing to three decimal places (21.886), you would set this option to 3.

- **Quick Approve Orders:** Specify whether you want to allow the approver the ability to approve multiple orders. Click Yes to allow the approver to approve multiple orders at once without having to view the details of each order Click No if you do not want to allow the approver to approve multiple orders. Instead, the approver will have to view the details of each order.
- **Out of Office Approval:** Specify whether you want to allow using the out of office approval feature. This feature allows approvers to specify when they will be out of the office as well as assign a different approver while they are out. Click Yes to use the out of office feature. Click No if you do not want to use the out of office feature.

The third portion of the window shows the Category Search through the Identify Promo Items options, as shown in Figure 9-4**.**

- **Category Search:** Click On to enable the Category Search feature. Click Off to disable it.

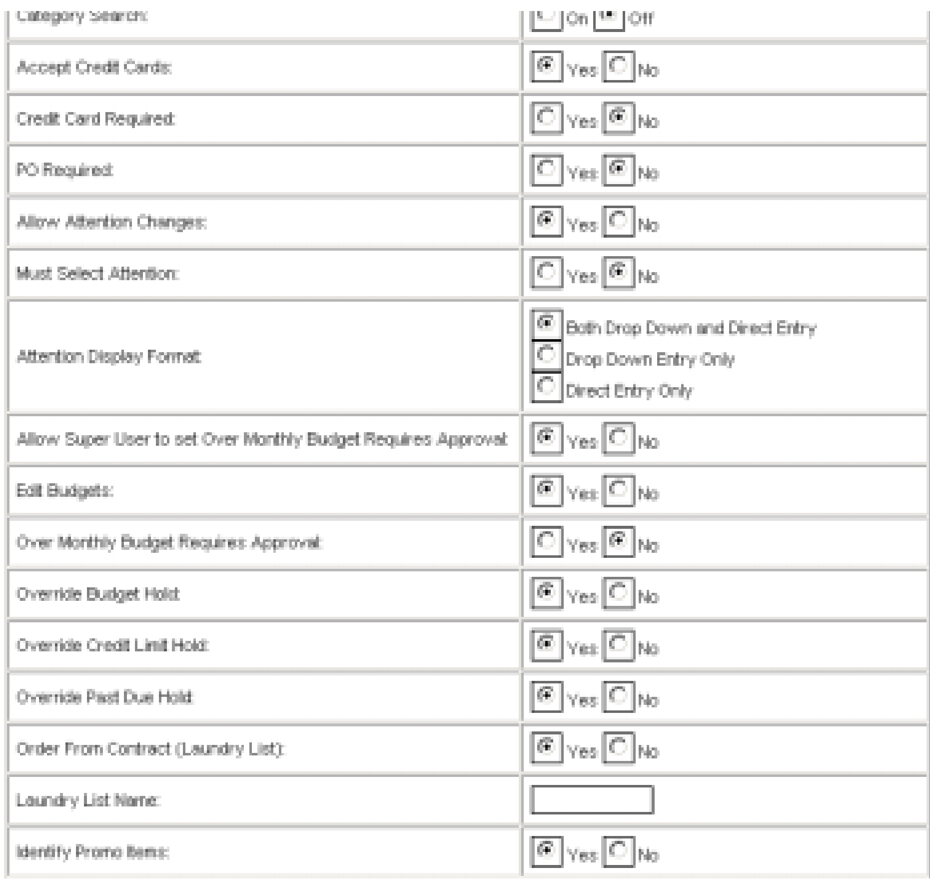


Figure 9-4: The Category Search Through Identify Promo Items Boxes

- **Accept Credit Cards:** Indicate whether this user can place credit card orders. To let this user place credit card orders, click Yes. To deny this user the privilege, click No. A credit card approval code automatically displays on the user's order summation page and on printed copies of the order.
- **Credit Card Required:** Indicate whether this user must use a credit card when placing orders. If you set this option to Yes, the user must enter a credit card number to complete the order. This limits the user to placing credit card orders only. If you do not require this user to always place credit card orders, click No.
- **PO Required:** Specify whether or not this user requires a purchase order number on orders. If this user requires purchase order numbers, set this option to Yes. If this user does not require purchase order numbers, set this option to No.
- **Allow Attention Changes:** Specify whether this user can place orders for different attentions, if this user has more than one attention. To use this feature, this user must be set up with attentions on the DDMS system in the Customer database. Click Yes to allow this customer to place orders for different attentions. To prevent this user from placing orders for different attentions, click No.
- **Must Select Attention:** Specify whether to force this user to select an attention when logging into the Dealer Station DDMS Edition home page, if the user has more than one attention. If you set this option to Yes, the user must select an attention other than the default, before placing an order.
- **Attention Display Format:** Specify the method by which the user can select attentions when placing orders, if the user has more than one attention.
    - **Both Drop Down and Direct Entry:** Users can either select the attention from a drop down list, or enter the attention identification code manually.
    - **Drop Down Entry Only:** Users can choose from a drop down list, but cannot enter an attention identification code.
    - **Direct Entry Only:** Users must enter the attention identification code manually. The drop down list box does not appear. Since the drop down list is limited to 200 attentions, we recommend that you select the Direct Entry Only option for any users set up with more than 200 possible attentions.
- **Allow Super User to Set Over Monthly Budget Requires Approval:** This box allows or denies super users the ability to set the

Over Monthly Budget Requires Approval parameter for end users they create and maintain. Click Yes to grant the super user the ability to set and change this parameter. Click No to deny the super user the ability to set and change this parameter.

- **Edit Budgets:** Specify whether you allow this user to edit his own budget amounts. Click Yes to let the user edit his budget amounts. Click No to deny the user this privilege. Allowing a user to edit budgets enables the Edit Budgets link on the home page. The information in this box links to the (AB) Customer Monthly Budgets screen (Customer History Monthly Budgets tab) on the DDMS system.
- **Over Monthly Budget Requires Approval:** Indicate whether orders that exceed the monthly budget need approval before submitting them.
- **Override Budget Hold:** This box allows a user with a budget to override the budget and continue purchasing.
- **Override Credit Limit Hold:** This box allows a user with a credit limit to override it and continue purchasing.
- **Override Past Due Hold:** This allows a user with past due invoices to override their past due invoices and continue purchasing.
- **Order From Contract (Laundry List):** Specify whether you allow this user to order laundry list items. A laundry list is used to display items that a customer purchases on a regular basis. The user can select items from the list and place them on the order. Click Yes to let the user order laundry list items. Click No to prevent the user from ordering laundry list items.
- **Laundry List Name:** Enter the four-character identifier for the laundry list to assign this user. Enter the laundry list identifier in upper-case characters only. To use the laundry list feature, the following must be true:
  - The Kit field in the Item Detail screen in the (E) Inventory Master screen (Item Window) must be set to **M** or **C**. The corresponding Company field must be blank.
  - The Option field in the (L1) Terminal and Ticket Parameters screen must be set to **B** for Bill of Materials.
- **Identify Promo Items:** This identifies items that are on sale flyers set up in your system. Click Yes to display sale flyer items in green with the words Promo Price under the price. Click No to display prices in red with the words Your Price under the price.

The fourth portion of the window shows the Alternates box through the Contracts 1,2,3, 4 box. See Figure 9-5.

- **Alternates:** Specify whether this user can view and order alternate items. To use this feature, alternate items must be set up in the (E) Inventory Master screen (Item Window) on the DDMS system. To allow this user to order alternate items, click Allowed. To deny this privilege, click Not Allowed. If you select Not Allowed, the Item Actions listed above are ignored.
- **Reference Item Action:** This applies to any items you have set up as reference items in the DDMS system. If an item is set up as a reference item, the original item is not available. If you set this option to Normal and you select a reference item, you receive a message specifying the replacement item. You are prompted to accept this replacement item or cancel the item. If you select Automatic, any item without a pricing record and referenced to another item automatically shows the referenced item. If you click Ignore, replacement items are ignored and the originally ordered item is added to the order.

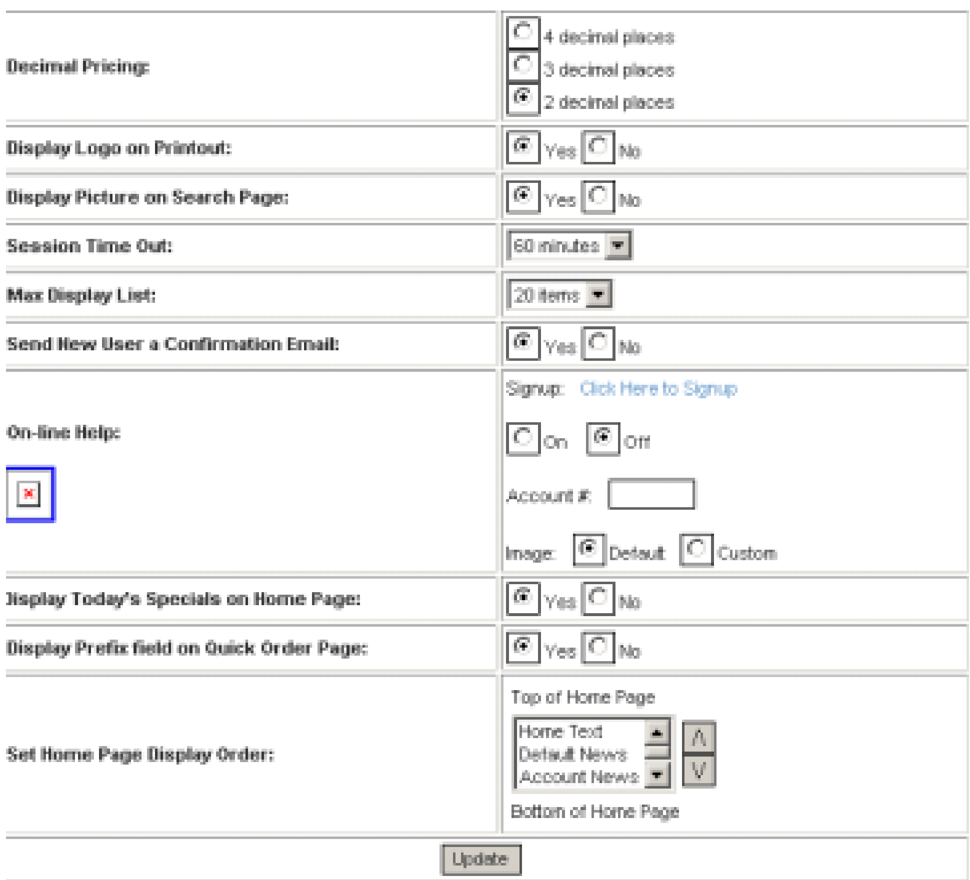


Figure 9-5: The Alternates Box through Contract 1,2,3,4 Boxes

- **Discontinued Item Action:** This applies to any items you have set up as discontinued items in the DDMS system. If you set this option to Normal and you select a discontinued item, you receive a message specifying the replacement item. You are prompted to accept this replacement item or cancel the item. If you set this option to Automatic, the system automatically enters the replacement item on your order. If you click Ignore, the system ignores any replacement items and adds the originally ordered item to the order.
- **Substitute Item Action:** Specify whether to automatically accept substitute items. If you select Normal, you are prompted with the substitute item so that you can accept it or cancel the item. If you select Automatic, the substitute item is automatically added to your order. If you click Ignore, substitute items are ignored and the originally ordered item is added to the order.
- **Reference OH = O Item Action:** Specify whether to automatically accept alternates for items that you sell when no on-hand quantities exist for the originally ordered item. If you select Normal, you are prompted with the alternate item so that you can accept it or cancel the item. If you select Automatic, the alternate item is automatically added to your order. If you click Ignore, alternate items are ignored and the originally ordered item is added to the order.
- **Generic Sub Item Action:** You can fill an order with a generic item using the price of the original item. Click Normal to prompt the user with the generic substitute item so that the user can accept it or cancel the item. Click Automatic to automatically add the generic substitute item to the order, and display the generic item in the cart. Click Blind to add the generic item to the user's order, but display the original item the user ordered in the cart. For example, if a customer orders item A, and the item has a generic substitute of B, the user sees the message "Item A added to the cart." Item A displays in the cart, even though item B was added to the order. In order history, the actual item ordered (item B in this example) displays. If you click Ignore, replacement items are ignored and the originally ordered item is added to the order.
- **Preferred Sub Item Action:** You can display an alternate item when there is a different item you prefer to sell. Click Normal to be prompted with the preferred substitute item so you can accept it or cancel the item. Click Automatic to automatically add the preferred substitute item to your order. Click Ignore to ignore any preferred substitute items and add the originally ordered item to the order.

- **Customer Specific Sub Item Action:** Specify whether your customers receive substitute items, indicated by the system, in place of other items. Click Normal to let your customers choose between the substitute item and the original item. Select Automatic to automatically place the substitute item on the order. Click Ignore to ignore substitute items and add the originally ordered item to the order.
- **Salesperson ID:** Enter the salesperson number from the (A) Customer screen (Customer window).
- **Route:** Enter the route you have set up in the (A) screen (Customer window) in the DDMS system.
- **Drop Ship Flag:** Enter the drop ship flag from the (A) screen (Customer window) in the DDMS system.
- **Credit Card Pay All:** Indicate whether to use a credit card to pay the total balance on an order. A credit card approval code automatically displays on the user's order summation page and on printed copies of the order.
- **Contract 1, 2, 3, 4:** Use these boxes to preassign contracts for default users. These contracts are used to set up default pricing for new accounts added online through guest users. Contracts must be set up in the back-end system.

The fifth portion of the window shows the Taxable box through Customer Service Return Module box. See Figure 9-6. The Taxable through Discount Percentage parameters are used for guest users setting up new accounts. The information you enter here applies to their account. There are three parameters you must have set before you enter any information in these boxes. Set the following parameters: Allow Guest Users to Create Accounts - Create DDMS and Is.D-Force Account option (Site Preferences); Allow Guest Users to Create Accounts - Yes option (Site Preferences); and the Guest User Must Be Active.

- **Taxable:** Select whether this user is taxable.
- **Taxable District:** Enter the user's tax district.
- **Discount Type:** Select the discount type from the drop down list to apply to the user's orders.
- **Discount Percentage:** Enter a discount percentage to apply to this user's orders.
- **Display Available Budget:** Indicate whether a customer's available budget displays on the end-user's home page.
- **User is Eligible to Receive Promotions:** Indicate whether your customers can receive promotional offers or items.

- **User is Eligible to Receive Coupons:** Indicate whether your customers can receive coupons.
- **User is Eligible to Receive Discounts:** Indicate whether your customers can receive discounts.
- **Customer Service Return Module:** Indicate whether to enable the Return Request module. If you select Yes, the Return Request module is enabled and the end-user can enter items previously purchased for return / pick up. After you accept, you can process a credit against the purchase using the same payment type as the original purchase invoice. For more information, see **Chapter 22: Setting Up Return Requests.**
- **X-Stamper Module:** The feature is reserved for future use.
- **Samsill Module:** The feature is reserved for future use.

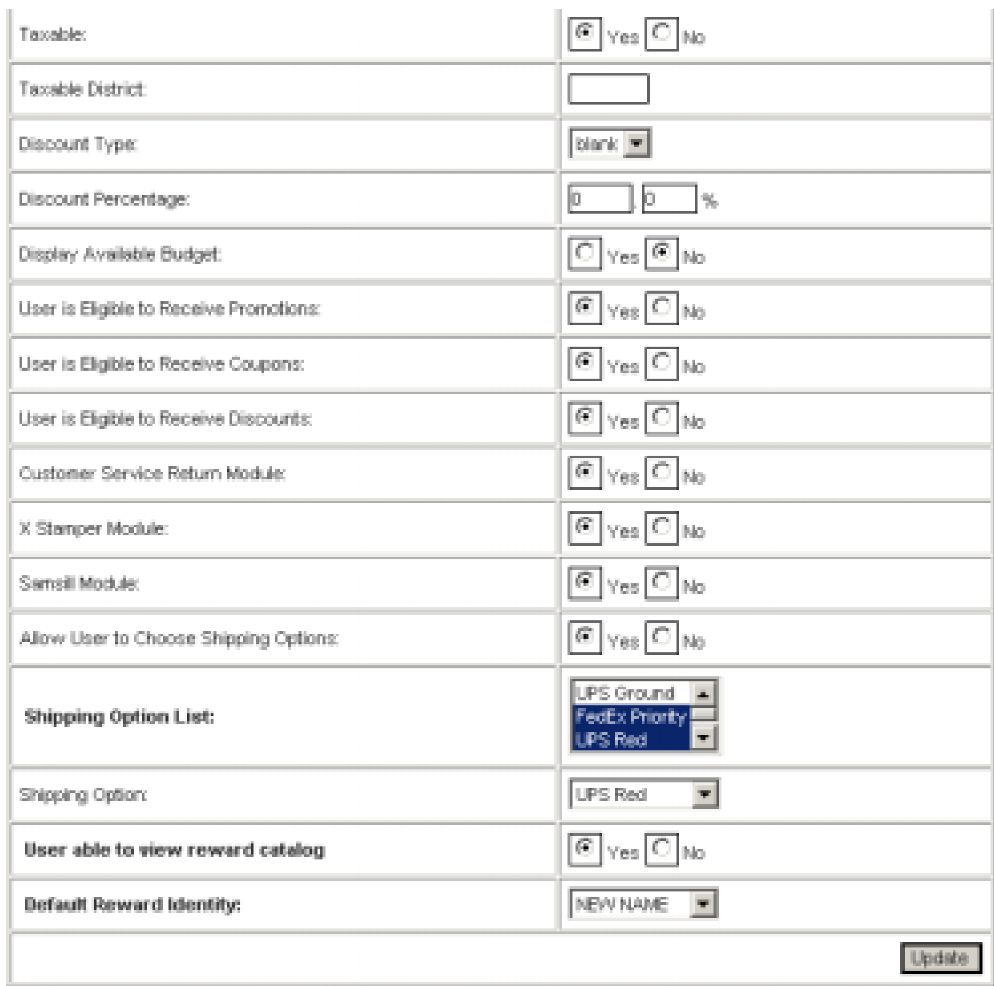


Figure 9-6: The Taxable Through Default Reward Identity Boxes

- **Allow User to Choose Shipping Options:** Specify whether you want to allow end users the ability to select from different shipping options, UPS Ground, UPS Blue, FedEx and so on. If you click Yes, the user will be prompted on the checkout page to select a shipping method. (You select the shipping options using the Shipping Option List box, below.) If you click No, end users will not have the ability to choose a shipping option.
- **Shipping Option List:** Click this box to select the list of shipping options you want to allow end users. To select more than one option from the list, hold the Ctrl key down and click each option you want to allow this user. If you want to allow this user to be able to choose from all shipping options, leave this box blank.
- **Shipping Option:** Click the down arrow in this box to set a default shipping option from the Shipping Management window.
- **User Able to View Reward Catalog:** Specify whether you want to allow this end user to view the reward catalog. To allow this user to view the catalog, click Yes. To deny the user the ability to view the reward catalog, click No.
- **Default Reward Identity:** Click the down arrow in this box to set the reward option from the Reward window.

4 When you finish, click Update to save the changes. To return to the Dealer Station DDMS Edition Administrative Control panel, click Admin Home.

Chapter 10: User Accounts

Contents

About User Accounts

Once you set global preferences that affect all your users, you can specify individual preferences for each user. For example, you can prevent specific users from placing credit card orders, or viewing item list pricing. However, before your customers can use Dealer Station DDMS Edition, you must add them as system users. When you do, you must assign them a unique user name and a password. You must also specify company, department, and printer information.

While adding users, you can set individual preferences. Just as you can allow or deny salesperson access to various features, you can do the same with Dealer Station DDMS Edition. While the DDMS system links each salesperson's system access to the salesperson's number, Dealer Station DDMS Edition links the user's privileges to his or her unique user name. By linking the privileges to the user's name, you can set up different privileges for each of your users.

After the user is added and the preferences assigned, you can return later and edit or change the preferences whenever necessary. You do this by searching for the user to change and adjusting the user's preferences.

The Guest User section allows non-customers (people without an account) to place orders with a credit card. The boxes in this section are similar to adding a user account. Guest Users use generic pricing you set up in the (A) screen (Customer window) in the DDMS system. Guest Users must use a credit card for all orders.

Demo User Accounts

You can set up a demo account that allows you to demonstrate to your customers how the entire Dealer Station DDMS Edition works. You can add users, place orders and even check out without incurring transaction charges. These orders appear to be submitted, but do not actually go to your back-office system. You must set up this demo account on your DDMS system with the account number DEMO. For more information about adding a customer, see your online documentation.

Adding New and Guest Users

1 Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

2 When the Dealer Station Control Panel opens, click **User Accounts**.

Note: The parameters you set in Site Preferences override your responses in User Accounts. The boxes affected by this are: View Held Orders, Order History, View List Prices, View Customer Prices, View Contract Items, View Promo Items, View Qty On Hand, Accept Credit Cards, Show Extended 3 Digit Price, Choose Shipping Options (affected by the Shipping and Handling and Shipping Management boxes in Site Preferences).

3 The Dealer Station DDMS Edition Search For Users window opens. Before you begin adding users, you must select the user type. Select the default user type from the User Type drop down list box. For more information, see **Chapter 9: Default User Settings**.

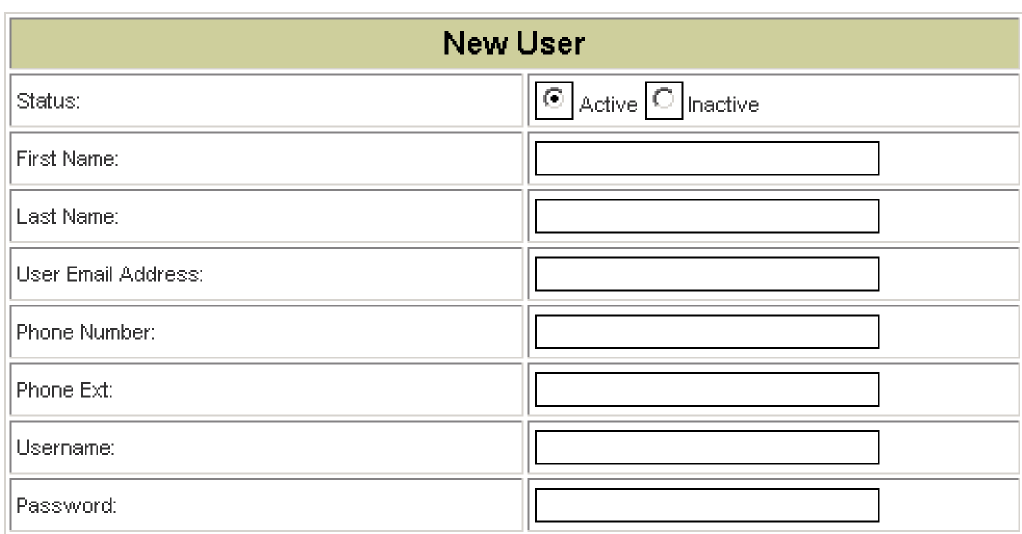
- To add a new user, click Add User.
- To add a guest user, click Guest Login.

Note: The setup boxes for new users and guest users appear the same, but several boxes are unavailable for guest users. These boxes are gray and you cannot click them. Boxes not available for guest users are indicated next to the box definition.

4 You can add or change information in each box and option in this window.

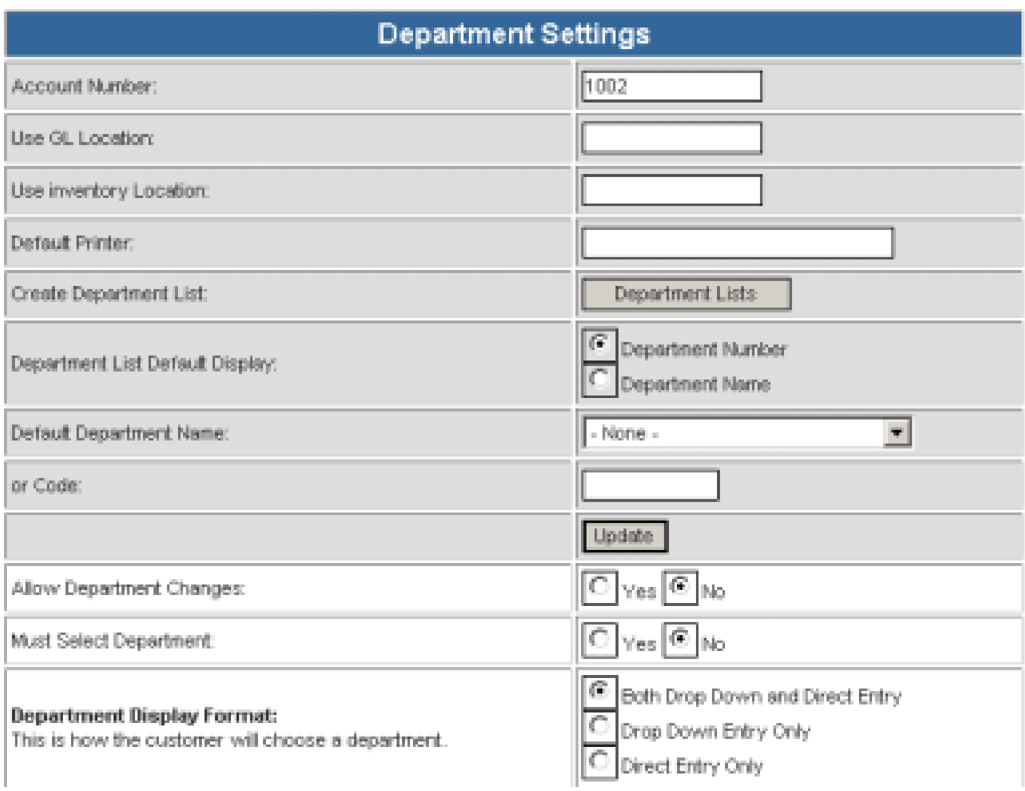
- **Status:** Specify whether this end-user can log onto the Dealer Station DDMS Edition end-user home page. When adding new users, you should let them access the end-user home page. However, if the customer is no longer active, you can set this option to Inactive. Click Inactive to deny this user login privileges. Click Active to grant the user login privileges (default). See Figure 10-1.

Figure 10-1: The New User Boxes



- **First Name:** Enter this user’s first name. The end-user can change this information.
- **Last Name:** Enter this user’s last name. The end-user can change this information.
- **User Email Address:** Enter this user’s email address. *This box does not apply to setting up a guest user.*
- **Phone Number:** Enter the user’s phone number. *This box does not apply to setting up a guest user.*
- **Phone Ext:** Enter the user’s phone number extension, if applicable. *This box does not apply to setting up a guest user.*
- **Username:** Enter a unique Dealer Station name for this user. This is the name that the end-user enters in the Username box when logging into the Dealer Station DDMS Edition home page.
- **Password:** Enter this user’s password. This is the password that the end-user enters in the Password box when logging into the Dealer Station home page. The end-user can change this information.

Figure 10-2: The Department Settings Boxes



Use the following instructions to set department settings. See Figure 10-2.

- **Account Number:** Enter this user’s DDMS account number.
- **Use GL Location:** If you are live on general ledger and have multiple general ledger locations, enter the DDMS G/L location for this user. If you leave this box blank, the default location set in the Loc field in the (L1) screen for the Dealer Station DDMS Edition port is used.
- **Use Inventory Location:** If you have multiple locations, you can use this box to enter the inventory location to use to fill this user’s orders. If you leave this box blank, the default location set in the Loc field in the (L1) screen for the Dealer Station DDMS Edition port is used.

Note: This feature does not display until you enter an account number and click Update in the Department Settings section.

- **Default Printer:** Enter the name of the printer to print this user’s pick tickets. Enter the printer’s name in upper case characters, P1, for example, and not p1. The printer you specify here must be set up on the DDMS system .

  If you leave this box blank, the default printer settings entered in the T-I-C-K-E-T-S P field in the (L1) screen for the Dealer Station DDMS Edition port are used. If you are unsure which terminal this is, call Support.
- **Create Department List:** This box lets you set up departments for this customer. Click Create a Department List. In the Add/Remove Departments window, enter the department identification code in the Dept ID box. Click Add. The department is added to the list for that account. To remove a department, click the department to highlight it and click Remove. To remove all departments, click Remove All. When you finish making changes, click Finished.
- **Department List Default Display:** Specify how you want the end user’s department list to display. You can display the list by department number or by department name. Click the option below.
  - **Department Number**: Display the department list by department number.
  - **Department Name**: Display the department list by department name.

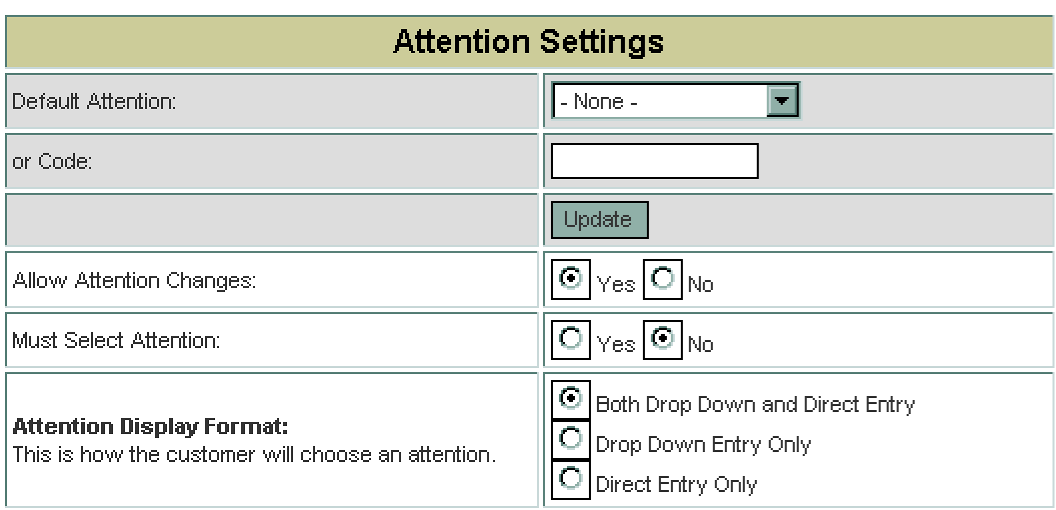
- **Default Department Name:** To set up this user with a default department, click the down arrow in this list box and select the department. If the Default Department Name box displays the word None, you can click the Or Code box and enter the four digit customer department. To use this feature, this user must be set up with departments in the Dept field in the (A) screen (Customer Window) on the DDMS system.
- **Allow Department Changes:** If this user has customer departments, specify whether the user can place orders for different departments. To use this feature, this user must be set up with departments in the Dept field in the (A) screen (Customer Window) on the DDMS system. Click Yes to allow this customer to place orders for different departments. To prevent this user from placing orders for different departments, click No. *This box does not apply to setting up a guest user.*
- **Must Select Department:** If this user has more than one department, you can force this user to select a department when logging into the Dealer Station DDMS Edition home page. If you set this option to Yes, the user must select a department, other than the default, before placing an order. If you do not want to force the user to choose a department before placing an order, click No. To use this feature, this user must be set up with departments in the Dept field in the (A) screen (Customer Window) on the DDMS system. *This box does not apply to setting up a guest user.*
- **Department Display Format:** If this user has more than one department, you can specify how the user selects departments when placing orders. Click the option to allow this user. *This box does not apply to setting up a guest user.*
  - **Both Drop Down and Direct Entry:** The user can select the department from a drop down list, or he can enter the department code manually.
  - **Drop Down Entry Only:** The user can choose from a drop down list, but cannot enter a department code.
  - **Direct Entry Only:** The user must enter the department code manually. The drop down list box does not appear.

Use the following instructions to specify attention settings. See Figure 10-3.

- **Default Attention:** If this user has more than one attention, click the down arrow in the list box and select the default attention for this customer to use when placing orders. If the Default Attention list box displays the word None, you can also click the Or Code box and enter the Attention Identification Code. To use this feature, this user must be set up with attentions in the (AX) Customer Attentions screen (Customer Shipto / Attention tab) on the DDMS system.

- **Allow Attention Changes:** If this user has more than one attention, you can specify whether the user can place orders for different attentions. This user must be set up with attentions in the (AX) screen (Customer Shipto / Attention tab) on the DDMS system. Click Yes to allow this customer to place orders for different attentions. To prevent this user from placing orders for different attentions, click No. *This box does not apply to setting up a guest user.*
- **Must Select Attention:** If this user has more than one attention, you can specify whether to force this user to select an attention when logging into the Dealer Station DDMS Edition home page. If you set this option to Yes, the user must select an attention other than the default, before placing an order. If you do not want to force this user to choose an attention before placing an order, click No. This user must be set up with attentions in the (AX) screen on the DDMS system. *This box does not apply to setting up a guest user.*
- **Attention Display Format:** If this user has more than one attention, you can specify how the user selects attentions when placing orders. *This box does not apply to setting up a guest user.*
  - **Both Drop Down and Direct Entry:** The user can either select the attention from a drop down list, or enter the attention identification code himself.

Figure 10-3: The Attention Settings



- **Drop Down Entry Only:** The user can choose from a drop down list, but cannot enter an attention identification code.
- **Direct Entry Only:** The user must enter the attention identification code. The drop down list box does not appear. Since the drop down list is limited to 200 attentions, we recommend that you select the Direct Entry Only option for any users set up with more than 200 possible attentions.

Use the following instructions to set up e-mail confirmation. See Figure 10-4.

- **Send Email Confirmation to This User:** Indicate whether the customer can change the email address where they receive order information. Select Yes to let the user change their email address in the Update My Info section on the end-users web site. *This box does not apply to setting up a guest user.*
- **Send Email Confirmation of Order to Addresses Below:** Send any additional email confirmations for an order to the addresses listed. *This box does not apply to setting up a guest user.*

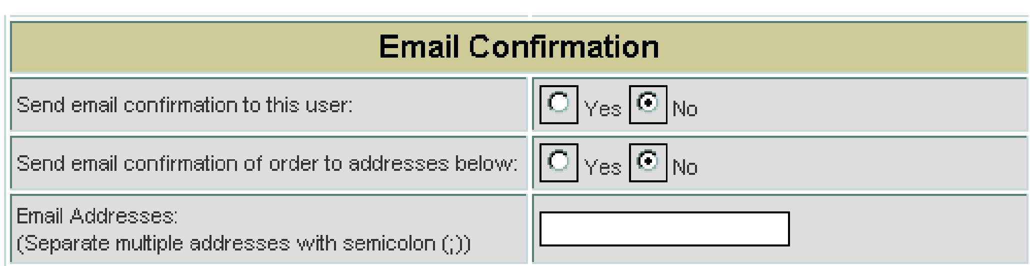
Note: The user is sent an automatic confirmation. These boxes allow for additional email confirmations.

- **Email Addresses:** This box displays the email address to which the confirmation email, approved orders, as well as those requiring approval are sent. You can enter more than one address by separating each address with a semicolon (;). *This box does not apply to setting up a guest user.*

Use the following instructions to set approval settings. See Figure 10-5.

- **Authorized Order Dollar Limit:** *This box only applies if you are going through the Order Approval process. If you are not, enter Ø.* Enter a maximum (pre-tax) dollar limit for each order this user places. Enter the maximum dollar limit all in one string. For example, to place the maximum order limit at $20,000, enter 20000 in this box. The default for this box is $0. You must enter an amount so this user can place orders. *This box does not apply to setting up a guest user.*

Figure 10-4: The Email Confirmation Settings



- **Authorized Line Item Limit Ext Dollar Limit:** Enter a maximum number of items a user can order. *This box does not apply to setting up a guest user.*
- **Maximum Line Item Unit Price:** Enter a maximum total quantity on a line item. *This box does not apply to setting up a guest user.*
- **Authorized Max Dollars Per Month:** Enter a maximum total amount that the end-user can place within a given month. If the user exceeds the monthly total amount, the system displays a warning message on the Checkout page. (This is a user level budget and will not conflict with an account-level or department-level budget.)
- **Non-Contract Items Require Approval:** Indicate whether orders containing non-contract items need approval before submitting them. The person set up in the Approval Username box is the person who approves these orders. *This box does not apply to setting up a guest user.*

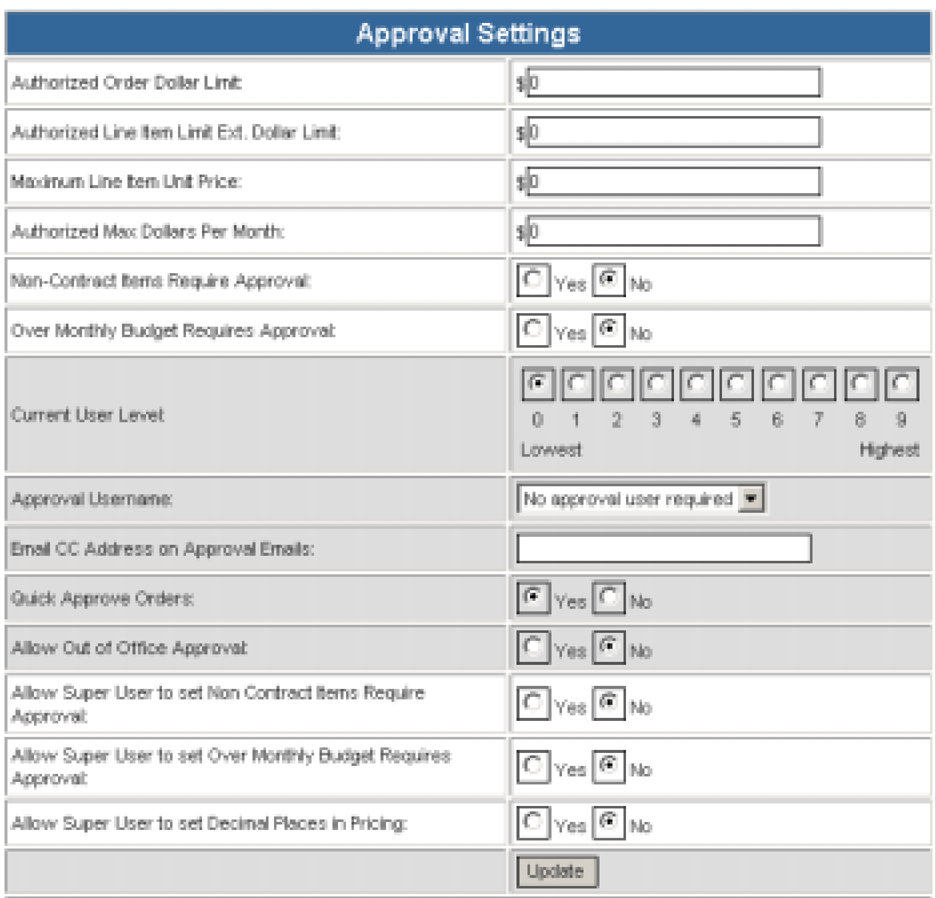


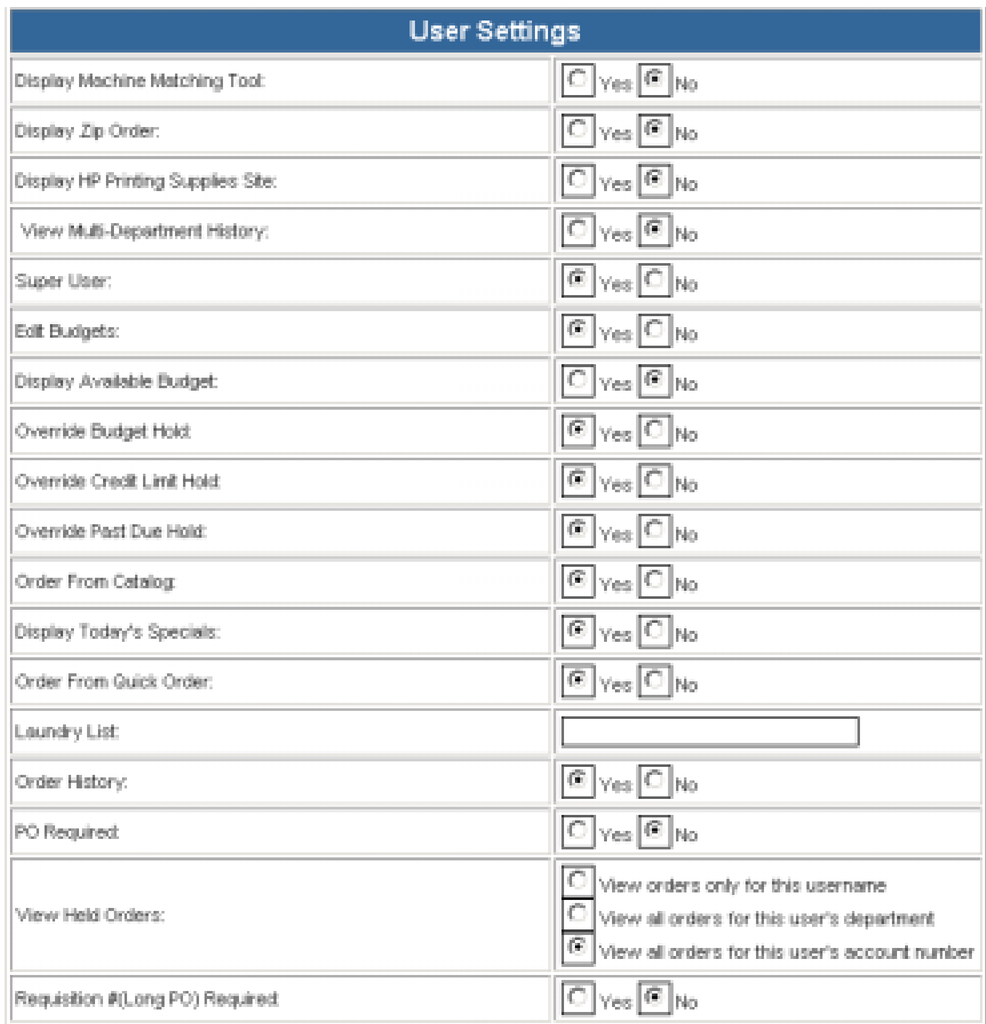
Figure 10-5: The Approval Settings Boxes

- **Over Monthly Budget Requires Approval:** Indicate whether orders that exceed the monthly budget need approval before submitting them. *This box does not apply to setting up a guest user.*
- **Current User Level:** Select this user's order level. The user can only view orders at the level that you set here. You can select a level between Ø and 9. *This box does not apply to setting up a guest user.*
- **Approval Username:** Select who approves the order. *This box does not apply to setting up a guest user.*
- **Email CC Address On Approval Emails:** Select whether to include the email address on confirmation emails.
- **Quick Approve Orders:** Specify whether you want to allow the approver the ability to approve multiple orders. Click Yes to allow the approver to approve multiple orders at once without having to view the details of each order Click No if you do not want to allow the approver to approve multiple orders. Instead, the approver will have to view the details of each order.
- **Allow Out of Office Approval**: Specify whether you want to allow using the out of office approval feature. This feature allows approvers to specify when they will be out of the office as well as assign a different approver while they are out. Click Yes to use the out of office feature. Click No if you do not want to use the out of office feature.
- **Allow Super User to Set Non Contract Items Require Approval:** This box allows or denies super users the ability to set the Non-Contract Items Require Approval parameter for end users they create and maintain. Click Yes to grant the super user the ability to set and change this parameter. Click No to deny the super user the ability to set and change this parameter.
- **Allow Super User to Set Over Monthly Budget Requires Approval:** This box allows or denies super users the ability to set the Over Monthly Budget Requires Approval parameter for end users they create and maintain. Click Yes to grant the super user the ability to set and change this parameter. Click No to deny the super user the ability to set and change this parameter.
- **Allow Super User to Set Decimal Places in Pricing:** This box allows or denies super users the ability to set the Decimal Places in Pricing parameter for end users they create and maintain. Click Yes to grant the super user the ability to set and change this parameter. Click No to deny the super user the ability to set and change this parameter.

Use the following instructions to set up user settings. See Figures 10-6, 10-8 and 10-9.

- **Display Machine Matching Tool:** Choose whether to make the Machine Matching Tool option available to this end-user. The machine matching tool allows the user to select a machine and then purchase parts for that machine from a list of parts that matches that machine.
- **Display Zip Order:** Indicate whether you want to make the Zip Order feature available to this end-user.
- **Display HP Printing Supplies Site:** Indicate whether you want to make the Hewlett Packard Printing Supplies site available to this end-user.

Figure 10-6: The User Settings Boxes



User Settings	
Display Machine Matching Tool:	Yes No
Display Zip Order:	Yes No
Display HP Printing Supplies Site:	Yes No
View Multi-Department History:	Yes No
Super User:	Yes No
Edit Budgets:	Yes No
Display Available Budget:	Yes No
Override Budget Hold:	Yes No
Override Credit Limit Hold:	Yes No
Override Past Due Hold:	Yes No
Order From Catalog:	Yes No
Display Today's Specials:	Yes No
Order From Quick Order:	Yes No
Laundry List:	
Order History:	Yes No
PO Required:	Yes No
View Held Orders:	View orders only for this username View all orders for this user's department View all orders for this user's account number
Requisition #(Long PO) Required:	Yes No

- **View Multi-Department History:** You can use this box to specify whether end users can view order history for all departments, without the necessity of changing departments or opening a separate window. Click Yes to allow this user to view order history for all departments. To prevent this user from viewing order history for all departments, click No.
- **Super User:** Specify whether this user has administrative rights for his customer account and the other users within his company. If you set this option to Yes, this user is granted administrative rights. If you set this option to No, this user does not have administrative rights. The Super User can add users and place them in specific departments. If a customer is not given super user rights, he cannot add users. *This box does not apply to setting up a guest user.*
- **Edit Budgets:** Specify whether this user can edit his own budget amounts. Click Yes to let this user edit his budget amounts. This enables the Edit Budgets link on the home page. Click No to deny this privilege. *This box does not apply to setting up a guest user.*
- **Display Available Budget:** Indicate whether to display the customer's available budget on the end-user's home page.
- **Override Budget Hold:** The user can override the budget and continue purchasing.
- **Override Credit Limit Hold:** The user can override their credit limit and continue purchasing.
- **Override Past Due Hold:** The user can override their past due invoices and continue purchasing.
- **Order From Catalog:** Specify whether this user can search for items using the online item catalog. Click Yes to let the user view and order items using the online item catalog. Click No to disable

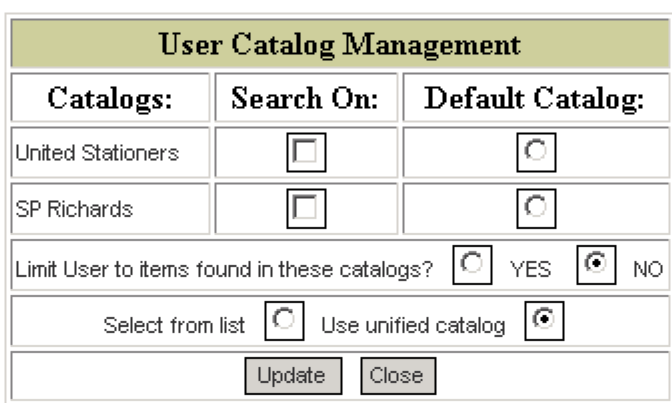


Figure 10-7: The User Catalog Management Window

the catalog search feature when placing orders. This parameter also affects favorites list.

- **User Catalog Management:** Specify the catalogs this user can access. Click Catalog Management to open the Catalog Management window, shown in Figure 10-7. The available catalogs appear in the Catalogs column.

Note: The User Catalog Management feature is only available for existing users. To apply it to a new user, you must first add and save the user.

To give the user access to a catalog, check the box in the Search On column corresponding to it. To limit the user to only the selected catalogs, click Yes in the Limit User to Items Found in These Catalogs box. Click No to give the user access to other catalogs.

To set a default catalog for this user, click the button in the Default Catalog column corresponding to the catalog. Next, you must click Select From List. You can only select one default catalog.

To compile all the selected catalogs into one, click Use Unified Catalog. This feature is not available if you set a default catalog.

When you finish, click Update to exit the Catalog Management window.

- **Display Today's Specials:** Specify whether to display Today's Specials on the end-user's site. For more information, see **Chapter 13: Today's Specials**.
- **Order From Quick Order:** This turns off the quick search feature on an end-user's web site.
- **Laundry List:** Enter the four-character identifier for the laundry list to assign this user. Enter the laundry list identifier in upper case characters only. To use the laundry list feature, the following must be true:
  - The Kit field in the Item Detail screen in the (E) Inventory Master screen (Item Window) must be set to **M** or **C**. The corresponding Company field must be blank.
  - The Option field in the (L1) screen must be set to **B** for Bill of Materials.
- **Order History:** Specify whether this user can inquire on order history. Click Yes to let the user view order history. Click No to deny access to order history. *This box does not apply to setting up a guest user.*

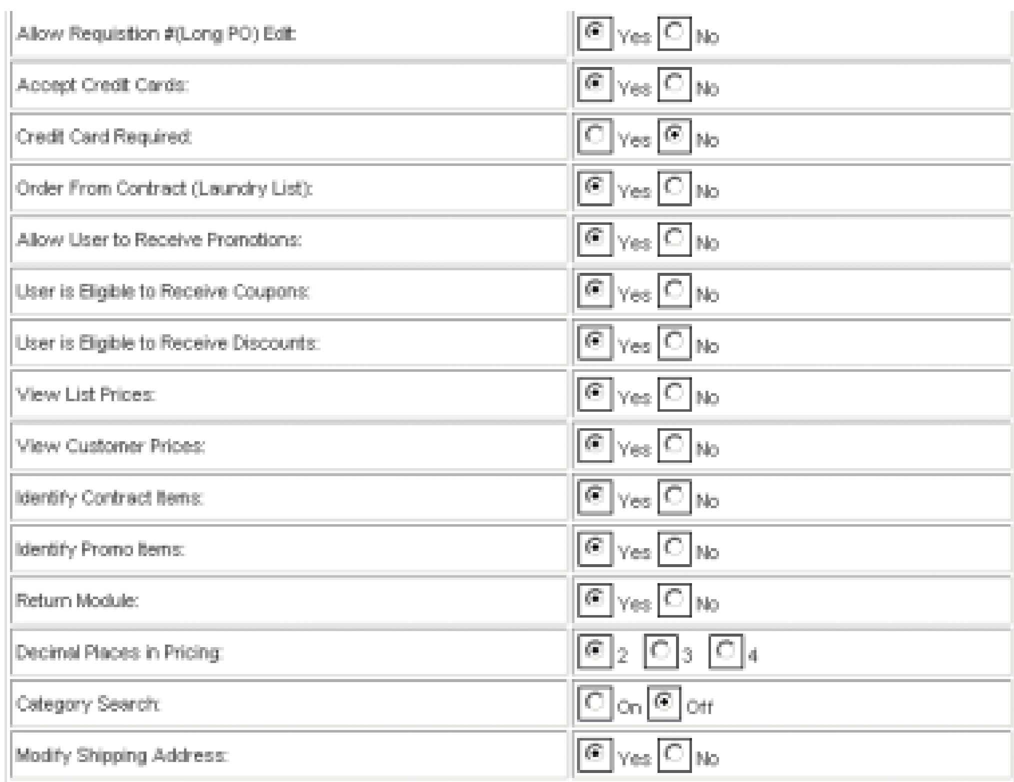
- **PO Required:** Specify whether or not this user requires a purchase order number on orders. Click Yes if this user requires purchase order numbers. Click No if he does not.
- **View Held Orders:** Specify the orders this user can view. (This applies to held orders.) *This box does not apply to setting up a guest user.*
  - **View Orders Only for this Username:** The user can only view the orders he has placed (orders created with his user name).
  - **View All Orders for this User's Department:** The user can view all orders placed for his department within the company. (This includes orders this user has placed and any additional orders placed for his department by different company users.)
  - **View All Orders for this User's Account Number:** The end-user can view all orders placed for his company's account number. (This includes orders this user placed, and any additional orders created by other company users. This also includes all orders placed for various departments within the company, if applicable.)
- **Requisition Nbr (Long PO) Required:** Indicate whether to require the Requisition # (Long P/O) to check out. If you select No, the Requisition # does not appear on the Checkout Page.
- **Allow Requisition Nbr (Long PO) Edit:** Specify whether to let the user change the Requisition # (Long P/O) on the Checkout page. *This box does not apply to setting up a guest user.*
- **View Quantity On Hand:** You can let this user view on-hand item quantities from the (E) screen (Item Window). To let this user view item on-hand quantities, click Yes. To deny this privilege, click No.
- **Accept Credit Cards:** Indicate whether this user can place credit card orders. To allow this user to place credit card orders, click Yes. To deny this privilege, click No. *When adding a guest user, you can only select Yes.*
- **Credit Card Required:** Indicate whether this user must use a credit card when placing orders. If you set this option to Yes, the user must enter a credit card number to complete the order. The user can only place credit card order. If you do not require this user to always place credit card orders, click No. *When adding a guest user, you can only select Yes.*
- **Order From Contract (Laundry List):** Specify whether this user can order laundry list items. A laundry list is used to display

items that a customer purchases on a regular basis. The user can select items from the list and place them on the order. Click Yes to let this user order laundry list items. Click No to deny laundry list access.

- **Allow User to Receive Promotions:** Indicate whether the user is eligible for promotional items.
- **User Is Eligible to Receive Coupons:** Indicate whether the user is eligible for coupons.
- **User Is Eligible to Receive Discounts:** Indicate whether the user is eligible for discounts.
- **View List Prices:** Indicate whether the user can view an item's list price from the (E) screen (Item Master Tab). To allow this user to view item list pricing, click Yes. To deny this user to view item list pricing, click No.

Note: If you set the View List Prices option in the Site Preferences window to No, none of your users can view item list pricing. For any users to view item list pricing, the View List Prices option in the Site Preferences window must be set to Yes.

Figure 10-8: The User Settings Boxes

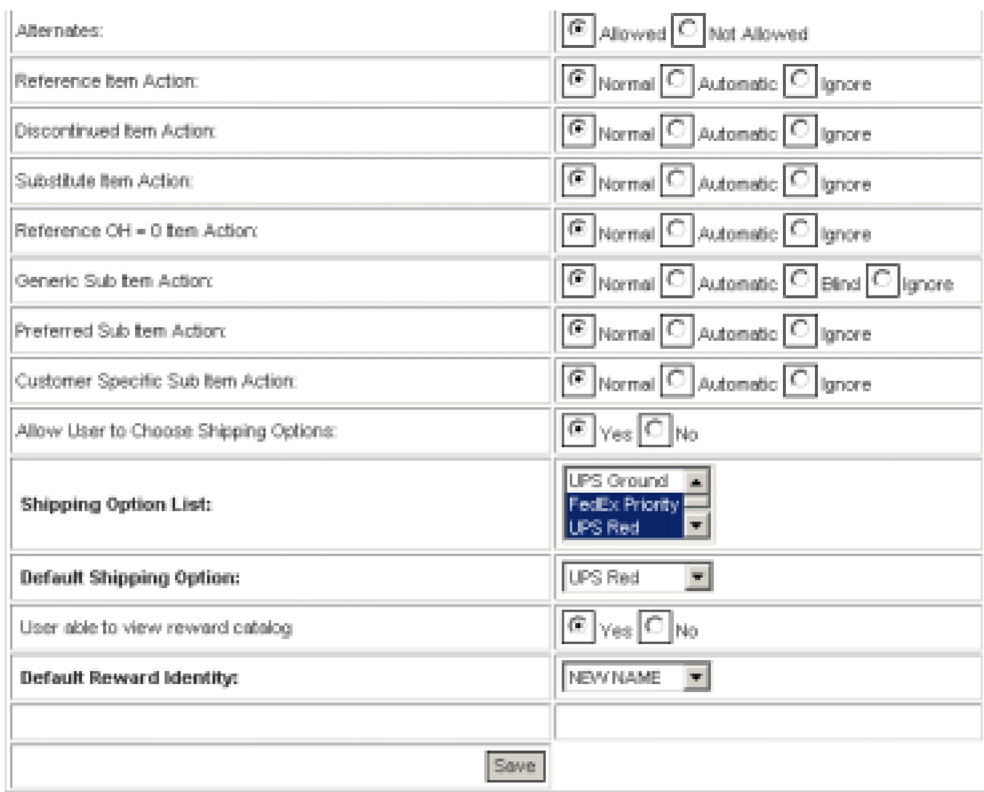


Allow Requistion #(Long PO) Edit:	Yes No
Accept Credit Cards:	Yes No
Credit Card Required:	Yes No
Order From Contract (Laundry List):	Yes No
Allow User to Receive Promotions:	Yes No
User is Eligible to Receive Coupons:	Yes No
User is Eligible to Receive Discounts:	Yes No
View List Prices:	Yes No
View Customer Prices:	Yes No
Identify Contract Items:	Yes No
Identify Promo Items:	Yes No
Return Module:	Yes No
Decimal Places in Pricing:	2 3 4
Category Search:	On Off
Modify Shipping Address:	Yes No

- **View Customer Prices:** Specify whether this user can view customer pricing. To allow this user to view customer pricing, click Yes. To deny this privilege, click No.
- **Identify Contract Items:** This identifies items on a contract. If you set this option to Yes, the item price displays in blue and the words Contract Price display under the price. If you set this option to No, the item price displays in red with the words Your Price displayed under the price.
- **Identify Promo Items:** This identifies items that are on sale flyers set up in your system. Click Yes to display sale flyer items in green with the words Promo Price under the price. Click No to display the prices in red with the words Your Price under the price.
- **Return Module:** Indicate whether to enable the Return Request module. If you select Yes, the end-user can enter items previously purchased for return / pick up. After you accept, you can process a credit against the purchase using the same payment type as the original purchase invoice. For more information, see **Chapter 22: Setting Up Return Requests.**
- **Decimal Places in Pricing:** Specify whether to figure the pricing to two, three or four decimal places. For example, to figure the pricing to three decimal places (21.886), click 3. If you select 4, a zero is added to the end of the price to create the four decimal pricing. Use this feature if you already use the three decimal feature on the DDMS system.
- **Category Search:** Specify whether the user to use the category search feature. Click Yes to allow the user the ability. Click No if you do not want the user to use the category search feature.
- **Modify Shipping Address:** Specify whether the user can change the shipping address while placing orders. *When adding a guest user, you can only select Yes.*
- **Alternates:** Specify whether this user can view and order alternate items. To use this feature, alternate items must be set up in the (E) Inventory Master screen (Item Window) on the DDMS system. To allow this user to order alternate items, click Allowed. To prevent this user from ordering alternate items, click Not Allowed. If you select Not Allowed, the Item Actions listed above are ignored.
- **Reference Item Action:** This option applies to any items you have set up as reference items in the DDMS system. If an item is set up as a reference item, the original item is not available. If you set

this option to Normal and you select a reference item, you receive a message specifying the replacement item. You are prompted to accept this replacement item or cancel the item. If you select Automatic, any item without a pricing record and referenced to another item automatically shows the referenced item. If you click Ignore, replacement items are ignored and the originally ordered item is added to the order.

- **Discontinued Item Action:** This option applies to items flagged as discontinued in the DDMS system. If you click Normal and select a discontinued item, you receive a message specifying the replacement item. You can accept this replacement item or cancel the item. Click Automatic to automatically enter the replacement item on your order. Click Ignore to disregard replacement items and add the originally ordered item to the order.
- **Substitute Item Action:** Specify whether to automatically accept substitute items. Click Normal to prompt the user with the substitute item . He can accept it or cancel the item. Click Automatic to automatically add the substitute item to the order. Click Ignore to disregard replacement items and add the originally ordered item to the order.



Alternates:	Allowed / Not Allowed
Reference Item Action:	Normal / Automatic / Ignore
Discontinued Item Action:	Normal / Automatic / Ignore
Substitute Item Action:	Normal / Automatic / Ignore
Reference OH = 0 Item Action:	Normal / Automatic / Ignore
Generic Sub Item Action:	Normal / Automatic / Blind / Ignore
Preferred Sub Item Action:	Normal / Automatic / Ignore
Customer Specific Sub Item Action:	Normal / Automatic / Ignore
Allow User to Choose Shipping Options:	Yes / No
Shipping Option List:	UPS Ground FedEx Priority UPS Red
Default Shipping Option:	UPS Red
User able to view reward catalog	Yes / No
Default Reward Identity:	NEW NAME
Save	

Figure 10-9: The User Settings Boxes

- **Reference OH = O Item Action:** Specify whether to automatically accept alternates for items to sell when no on-hand quantities exist for the originally ordered item. Click Normal to prompt the user with the alternate item . He can accept it or cancel the item. Click Automatic to automatically add the alternate item to the order. Click Ignore to disregard alternate items and add the originally ordered item to the order.
- **Generic Sub Item Action:** You can fill an order with a generic item, using the price of the original item. Click Normal to prompt the user with the generic substitute item. The user can accept it or cancel the item. Click Automatic to automatically add the generic substitute item to the order, and display the generic item in the cart. Select Blind to add the generic item to the user's order, but display in the cart the original item the user ordered. For example, if a customer orders item A, and the item has a generic sub of B, the user sees the message "Item A added to the cart." Item A displays in the cart, even though item B was added to the order. In order history, the actual item ordered (item B in this example) displays. Click Ignore to disregard replacement items and add the originally ordered item to the order.
- **Preferred Sub Item Action:** You can display an alternate item when there is another item you prefer to sell. Click Normal to prompt the user with the preferred substitute item . He can accept it or cancel the item. Click Automatic to automatically add the preferred substitute to the order. Click Ignore to disregard preferred substitute items and add the originally ordered item to the order.
- **Customer Specific Sub Item Action:** Specify whether your customers receive substitute items, indicated by the system, in place of other items. Click Normal to give your customers a choice between the substitute item and the original item. Select Automatic to automatically place the substitute item on the order. Click Ignore to disregard substitute items and add the originally ordered item to the order.
- **Allow User to Choose Shipping Options:** Specify whether you want to allow end users the ability to select from different shipping options, UPS Ground, UPS Blue, FedEx and so on. If you click Yes, the user will be prompted on the checkout page to select a shipping method. (You select the shipping options using the Shipping Option List box, below.) If you click No, end users will not have the ability to choose a shipping option.
- **Shipping Option List:** Click this box to select the list of shipping options you want to allow end users. To select more than one op-

tion from the list, hold the Ctrl key down and click each option you want to allow this user. If you want to allow this user to be able to choose from all shipping options, leave this box blank.

- **Default Shipping Option:** Click the down arrow in this box to set a default shipping option from the Shipping Management window.
- **User Able to View Reward Catalog:** Specify whether you want to allow this end user to view the reward catalog. To allow this user to view the catalog, click Yes. To deny the user the ability to view the reward catalog, click No.
- **Default Reward Identity:** Click the down arrow in this box to set the reward option from the Reward window.

5 When you finish, click Save. If you exit this window without clicking Save, your changes are not saved. To return to the Dealer Station Administrative Control Panel, click Back at the top of your Internet browser.

Figure 10-10: The Search for Users Window

Searching For Users

After you have added system users, you can modify or view the user's preferences. To do so, you must first retrieve the user whose settings to modify or view.

1. Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.
2. After the Dealer Station Control Panel opens, click the click User Accounts .
3. The Dealer Station Search for Users window opens. See Figure 10-10. You can search for a specific user by entering any or all of the following to limit the search: user account number, first name, last name, user name, and active status. You can also view all the users you have set up and select the user whose information to view or change.
   - Click the Account Number, First Name, Last Name, Username, Email or Active Status box and enter the information for this user. When you finish entering information, click Submit Search. The Search Results window opens with the results of your search, including the user's account number, full name, and user ID. To view or modify this user's preferences, click the user's name.
   - To view a list of users, click Display All. The All Users window opens. This window includes the user's account number, full name, and user ID. To select a user from the displayed list, click the user's name.
4. The Dealer Station DDMS Edition User Editor window opens. At this point, you can modify this user's information. For details on each box or option in this window, refer back to the heading **Adding New and Guest Users**.
5. When you finish, click Save. If you exit this window without clicking Save, your changes are not saved. To return to the Dealer Station DDMS Edition Administrative Control Panel, click Admin Home.

Mass Emailing Customers

You can create and send mass emails directly from Dealer Station. This feature makes it easy to send marketing messages and other announcements to all or selected customers. You can save emails to send at a later date and build a mailing list from your customers.

Creating a New Email

Use the following instructions for creating a new email.

1 Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

2 After the Dealer Station Control Panel opens, click **User Accounts**.

3 Click the Email Users in Mass link. See Figure 10-10.

4 The cursor displays in the subject box. Enter a subject for the email.

5 Enter the information for the email in the Body text box.

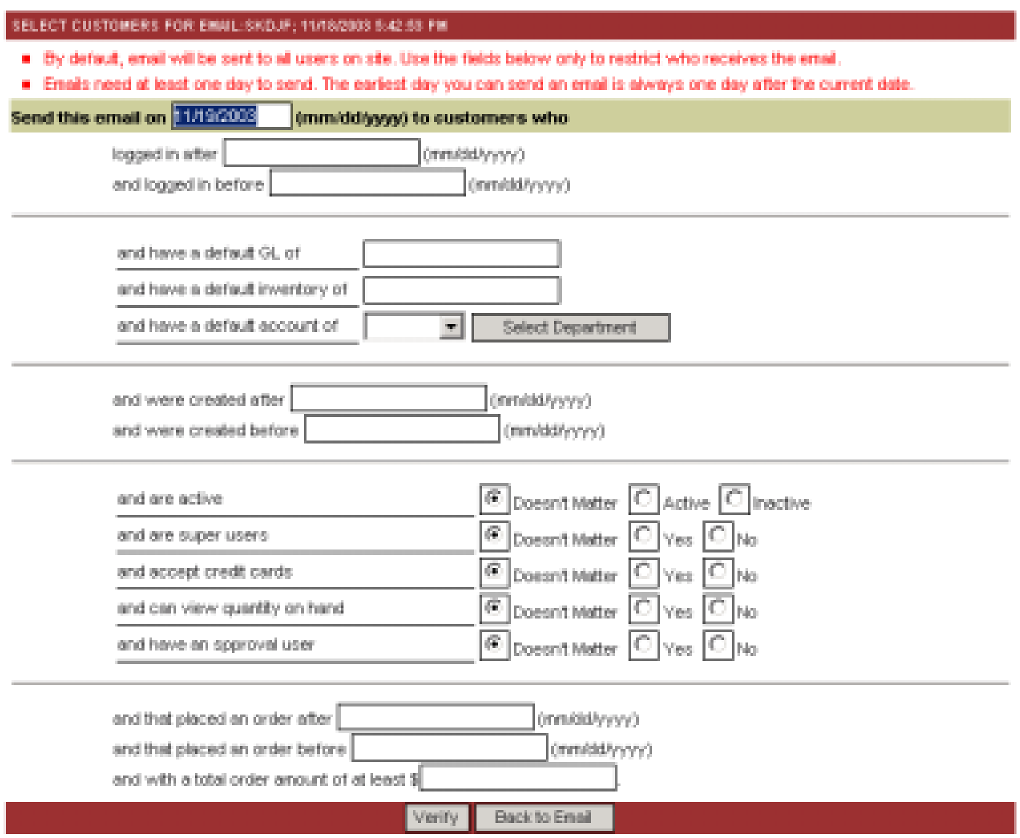
6 Select the mail format for this email. You can choose either MIME or Text.

7 Select the Body Format. You can choose either HTML or Text.

8 Click Choose Recipients. The Select Customers for Email window opens. See Figure 10-11.

9 Complete the date to send the email. Enter the date in the Send This Email On box.

Figure 10-11: The Select Customers for Email Window



Note: The earliest day you can send an email is always one day after the current date.

---

10 The email is automatically sent to all users on the site. To limit recipients, complete the boxes to specify who receives the email. If you leave the boxes blank, the email is sent to all the customers with a Dealer Station account.

You can limit by:

- Login date
- Default GL
- Default inventory
- Default account
- Creation date
- Status (active vs. inactive)
- Super user
- Accept credit cards
- View quantity on hand
- Have an approval user
- Order placement date
- Order total.

11 After you complete these boxes, you can verify the information by clicking Verify. This displays a list of customers matching the criteria selected.

Note: You can edit the email by clicking Back to Email.

---

12 From the list of customers, select any users to exclude. To exclude a customer, click the box next to the account number to exclude.

13 Click Send Email.

14 A confirmation message displays with the send date and number of customers receiving the email.

Sending an Email

When you complete an email and select the recipients, you can send it. Use the following instructions for sending an email.

1 To send the email, click Send Email.

2 A confirmation message displays. It states the date to send the email and how many customers receive it.

3 Select Confirm to send the message. If you are not ready to send it, click Cancel.

4 The email is sent to the Queue. To view items in the Queue, see the heading **Viewing Emails in the Queue**.

Previewing an Email

You can preview the email before sending it to your customers. Use the following instructions for previewing an email.

1 When you finish creating the email, click Preview.

2 A new window opens displaying the email.

- To return to the original window, click Return To Edit Template.
- To send the email, click Execute Test.

Saving an Email

You can save an email and send it later.

1 When you finish the email, click Save.

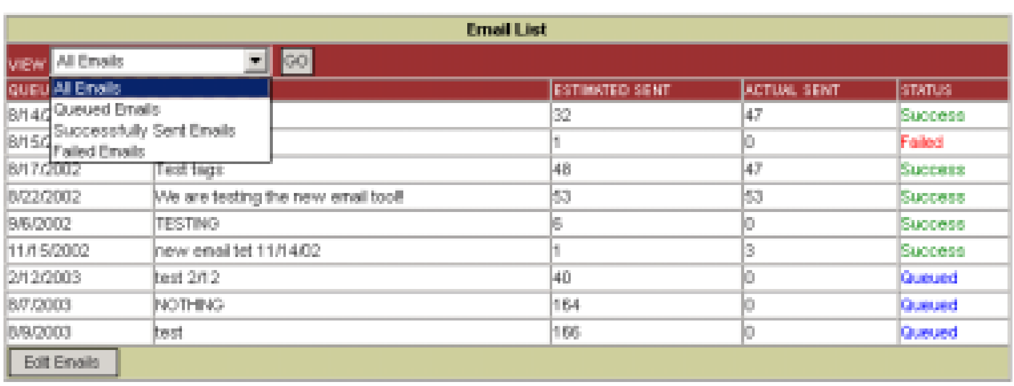
2 The email is saved with the subject name and date the email was created.

Retrieving an Existing Email

To send an email you have already created, you must retrieve it from the list of saved emails. Use the following instructions for retrieving an existing email.

1 Click the drop down list box at the top of the window under the text Open a Saved Email and click the email to open.

Figure 10-12: The View Drop Down List in the Queue Window



2 When the right email displays, click Open Email.

3 The email you selected displays. You can now edit, delete, or send it to select recipients.

Viewing Emails in the Queue

Emails that have been sent or are waiting to be sent display in the Queue. You can view these emails anytime. You can view all emails sent, failed emails (those not sent), successfully sent emails and queued emails (those waiting to be sent). Use the following instructions for viewing emails in the queue.

1 Click View Emails in the Queue.

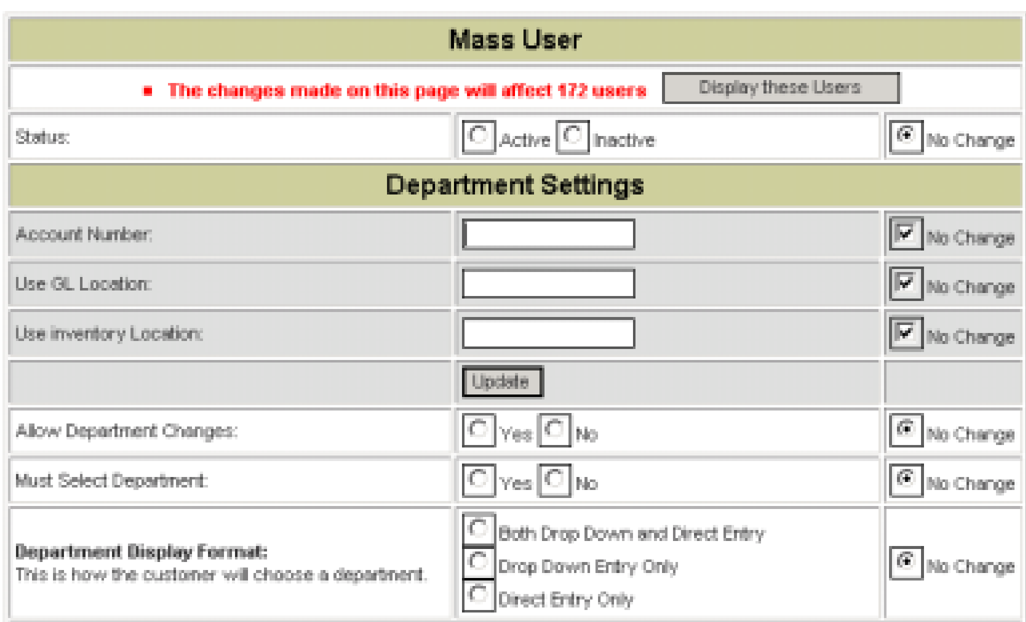
2 The Queue window opens. In the View drop down list box, select the type of emails to view. See Figure 10-12.

3 Click Go.

4 The type of emails you selected display. You can view the date the email was queued, the subject of the email, the estimated number of emails sent, the actual number of emails sent and the status of the email, such as failed, queued and sent.

5 Click Edit Emails to return to the main email window.

Figure 10-13: The Mass User Page



Deleting an Email

You can easily delete existing emails. Use the following instructions for deleting an email.

1. Select the email to delete from the drop down list box.
2. Click Open Email to open the email.
3. Click Delete. The email is deleted.

Mass Updating Customers

You can change all users or a selected group of users. You can select by Inventory, GL Location, Account, Department, Status, or any combination of these criteria. The changes apply immediately.

1. In the User Accounts window, click the Update Users in Mass link.
2. Select the search criteria to use to find a range of users to mass change. You can choose Inventory, GL Location, Account, Department, Status, or a combination of these.
3. Click Select Users.
4. The Dealer Station-Mass User page opens. See Figure 10-13. At the top of the page in red text, the number of users selected displays. To view all of these users, click Display These Users.
5. Change the user settings boxes for the users selected. If there is no change for a specific box, click No Change on that line. For information about the user setting boxes, see **Adding New and Guest Users**.

Note: The boxes default to No Change, so if you don't have to make any changes you can leave the defaults the way they are set.

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6. When you finish, click Submit Changes.
7. The Confirm Your Changes box displays. This box displays the number of users affected and the specific setting you changed. To submit the changes, click Submit Changes. Click Cancel Changes to return to the Dealer Station-Mass User page.

Chapter 11: Admin Favorites

Contents

Using Admin Favorites

You can create a favorites list to give customers easy access to products they purchase frequently. You can assign any favorites list to all users in a department within an account, all users in an account, or all members of the entire site.

1. Log onto the Dealer Station Administrative Control panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**
2. In the Dealer Station Control Panel, click Admin Favorites. The Admin Favorites page opens, as shown in Figure 11-1.
3. You can manage lists and assign lists to users. You can also edit list content.

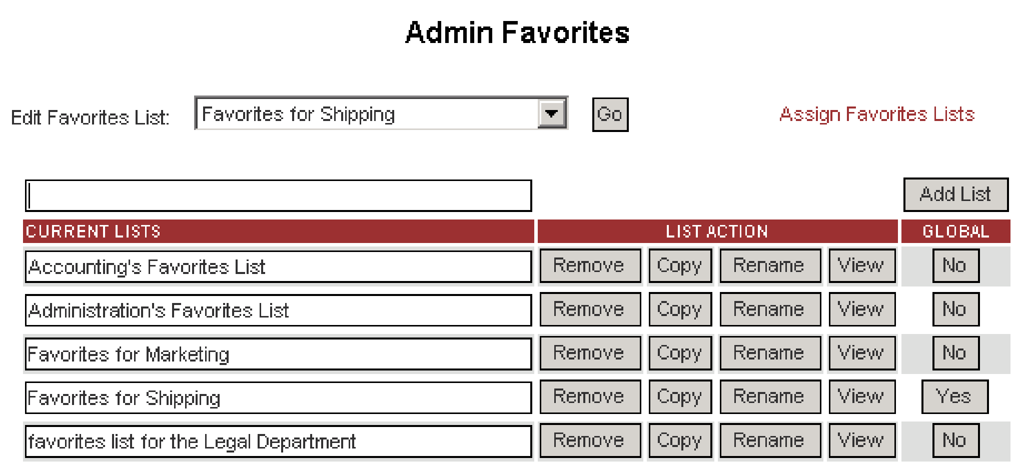


Figure 11-1: The Admin Favorites Page

Managing Favorites Lists

You can add, remove, copy and rename lists.

Adding a Favorites List

1. Open the Admin Favorites page.
2. In the box to the left of the Add List button, type a unique name for the new list. Click Add List.
3. The new list is added to your favorites lists. Click View to begin adding items to it.

Removing a Favorites List

1. Open the Admin Favorites page.
2. Click the Remove button corresponding to the list to delete.
3. At the message Click Continue to Permanently Remove the List, click Continue.

Note: Before you delete a list, make sure the list no longer contains any saved favorite items.

---

4. The list is deleted, along with its items.

Copying a Favorites List

1. Open the Admin Favorites page.
2. Click the Copy button corresponding to the list to copy.
3. At the Copy List With a New Name Of message, enter the new name.
4. Click Continue.
5. The duplicate list is added to your favorites lists with a new name. Click View to begin adding items to it.

Renaming a Favorites List

1. Open the Admin Favorites page.
2. From the Current Lists column, highlight the name of the list to change. Enter the new name over the old name.
3. Click the corresponding Rename button.
4. When the list is renamed, the List Renamed message appears above the Current Lists column. Click View to see the list.

Assigning Lists to Users

You can assign a favorites list to all users in a department within an account, all users in an account, or all members of the entire site.

Assigning Lists to Accounts/Departments

1. Open the Admin Favorites page.
2. Click Assign Favorites Lists. The Assign Favorites Lists window opens. See Figure 11-2.
3. In the Assign Favorites section of the window, click the down arrow in the Assign Favorites List box. Click the list to assign.
4. In the To Account box, enter the account number to which to assign this favorites list.
5. To assign the list to a department, click Select Department. In the Department list box, highlight the department to select. To select sequential departments, hold the Shift key as you click the first and last departments to select. To select multiple non-sequential departments, hold the Ctrl key as you click the departments to select.
6. Click Assign. The Assigned Favorites Lists section of the window shows the lists currently assigned, along with the account and department to which it is assigned.
7. When you finish, click Close Window.

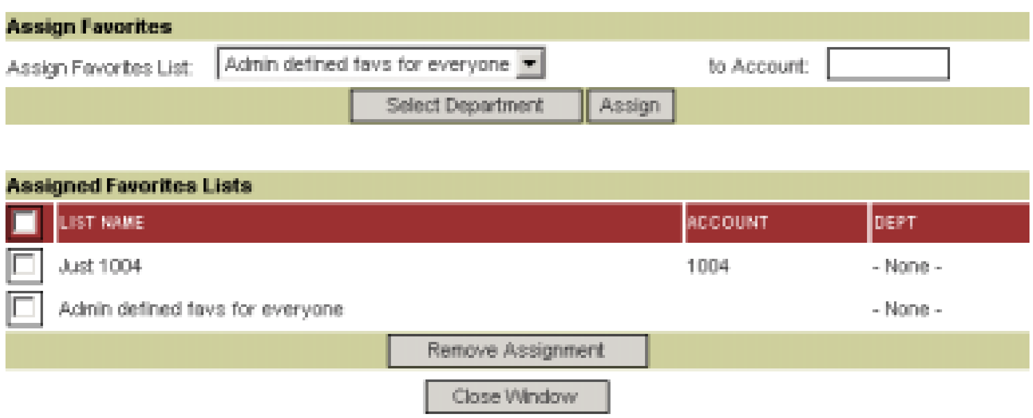


Figure 11-2: The Assign Favorites Lists Window

Deleting Assignments

In the Assign Favorites Lists window, you can also delete assignments, either individually or as a group.

1 To delete an assignment, click the check box next to the list name. See Figure 11-3. To delete all assignments, click the check box next to column heading List Name. To leave an assignment, clear the check box next to the list name.

2 Click Remove Assignment.

3 When you finish, click Close Window.

Assigning Lists Globally

1 Open the Admin Favorites page. Refer back to Figure 11-1.

2 The Global column has a status button corresponding to each favorites list.

   - The status button of lists that are currently assigned globally to users is Yes. To remove a list's global assignment, click Yes. The status button changes to No.
   - The status button of lists that are not currently assigned globally to users is No. To assign a list globally, click No. The status button changes to Yes.

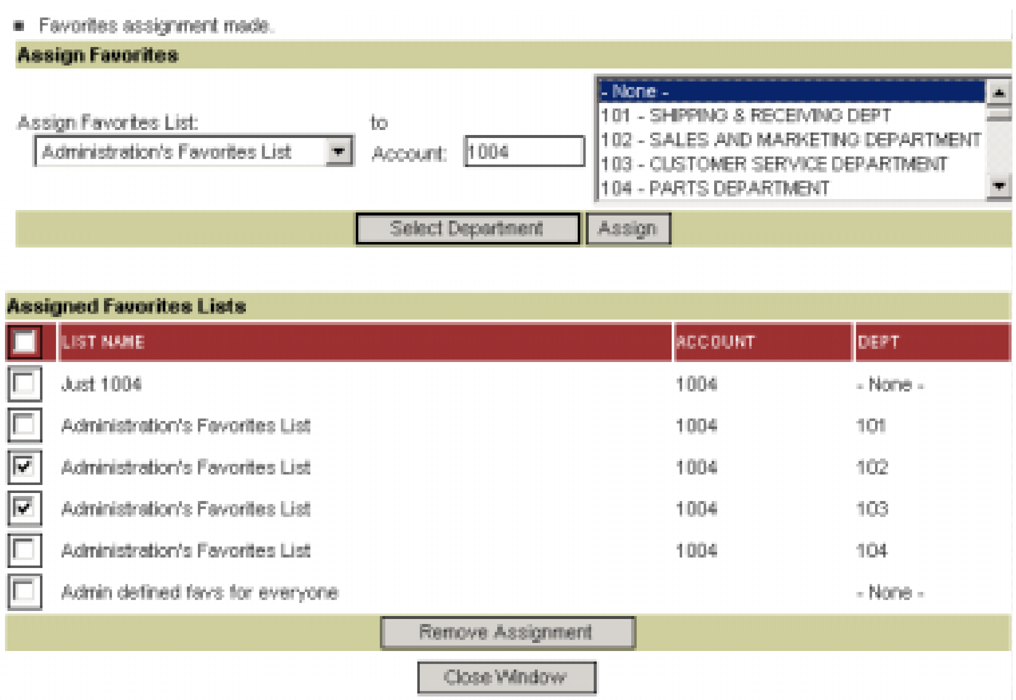


Figure 11-3: Removing Assignments in the Assign Favorites Lists Window

Editing Favorites Lists

Once you've created a favorites list, you can add items to it. You can also remove items, and view or sort items on the list.

1. Open the Admin Favorites page.
2. Click the down arrow in the Edit Favorites List box. Click the list to edit and click Go.

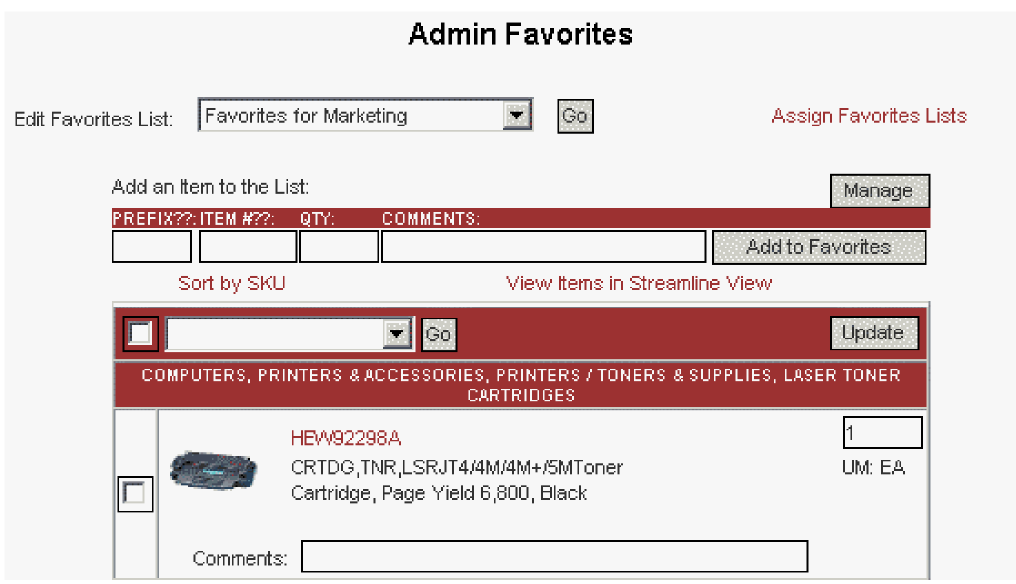
Adding an Item

1. Choose a favorites list from the Edit Favorites list box. Click Go.
2. In the Add an Item to the List section, enter the manufacturer prefix, item number, and quantity. See Figure 11-4.
3. Click Add to Favorites. The item is added to the list. The message Item Added to Favorites appears.

Removing an Item

1. Choose a favorites list from the Edit Favorites list box. Click Go.
2. Click the check box next to the item to delete.
3. From the list box at the top, select Remove Selected Items and click Go.

Figure 11-4: Editing Favorites Lists



Viewing Items

1. Choose a favorites list from the Edit Favorites list box. Click Go.
2. The favorites list displays with all the items on the list.
   - To view a simplified list, click View Items in Streamline View.
   - To view a detailed list, click View Items in Exploded View. You can view item information and an item picture if available. You can also add comments about the item in the Comments box.
3. You can sort your favorites list two ways:
   - Click Sort by SKU to view the items by SKU or item number. The items are sorted by item number in alphabetical and numerical order.
   - Click Sort by Group to view the items on your favorites list by group. The items are sorted by group in alphabetical order.

Chapter 12: System News

Contents

Using System News

You can create a news section called News of the Day for specific accounts or a range of accounts. You can create news for all users referred to as Default News. The news appears on the end-user's home page. You can enter text or HTML script in this box. For example, you can enter information about any special events or company news.

1 Log into the Dealer Station DDMS Edition Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**

2 After the Dealer Station panel opens, click **System News**. The System News window opens. See Figure 12-1. You can create news, view news already created for an account or delete news.

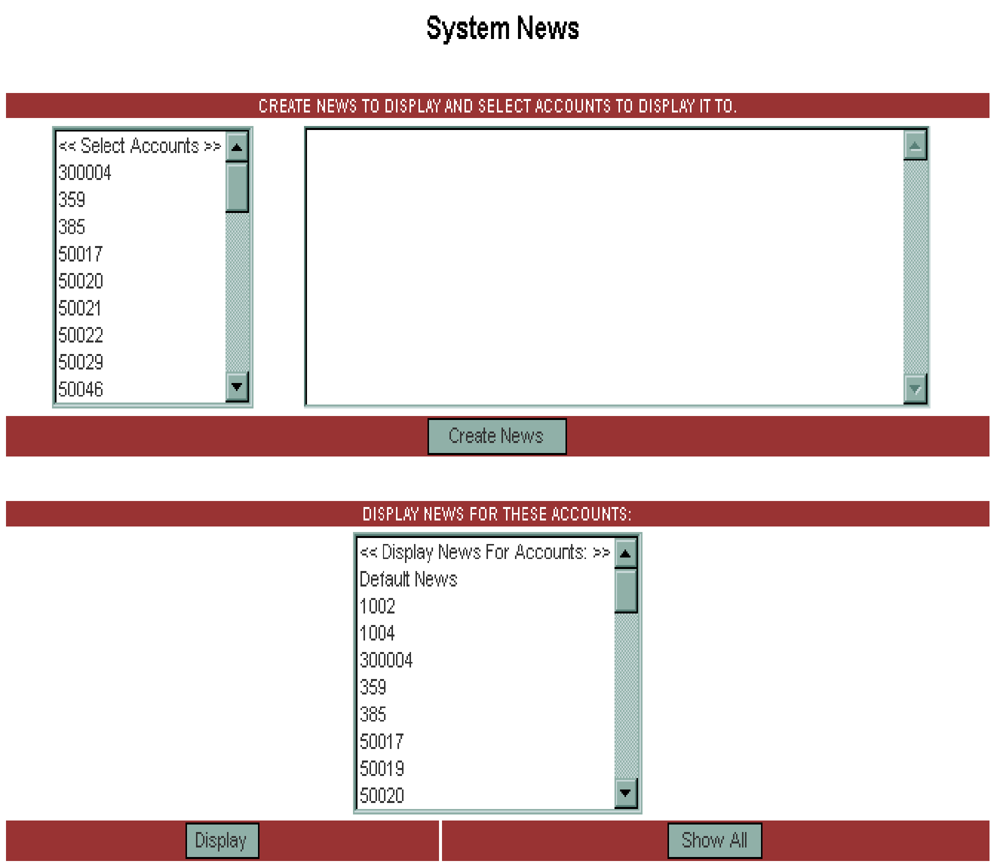


Figure 12-1: The System News text boxes

Create System News

1. Select an account or accounts for which you are creating news. To select several accounts, hold down the Ctrl button while highlighting account numbers.
2. Click the cursor in the text box next to the account numbers and enter the text to appear for the account(s) you selected.
3. When you finish, click Create News.

Viewing System News

1. Select the account(s) with the news to view. To select several accounts, hold down the Ctrl button while highlighting the account number.

Note: Click Show All to view each account with system news.

2. Click Display.
3. The news for each account displays with the creation date and time displayed below it. You can add or change the news that appears in these boxes.
4. Click update when you are finished.

Deleting System News

1. Select an account or accounts for which you are deleting news. To select several accounts, hold down the Ctrl button while highlighting account numbers.
2. Click Display.
3. Click Delete for each news item to delete. Make sure you click the Delete button under the account you are deleting.

Chapter 13: Today's Specials

Contents

Using Today's Specials

You can create a list of special items to bring to the end-user's attention. This list displays as a notepad on the end-user's home page, along with the text "Today's Specials." For the items to display on this list, you must set them up.

1. Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

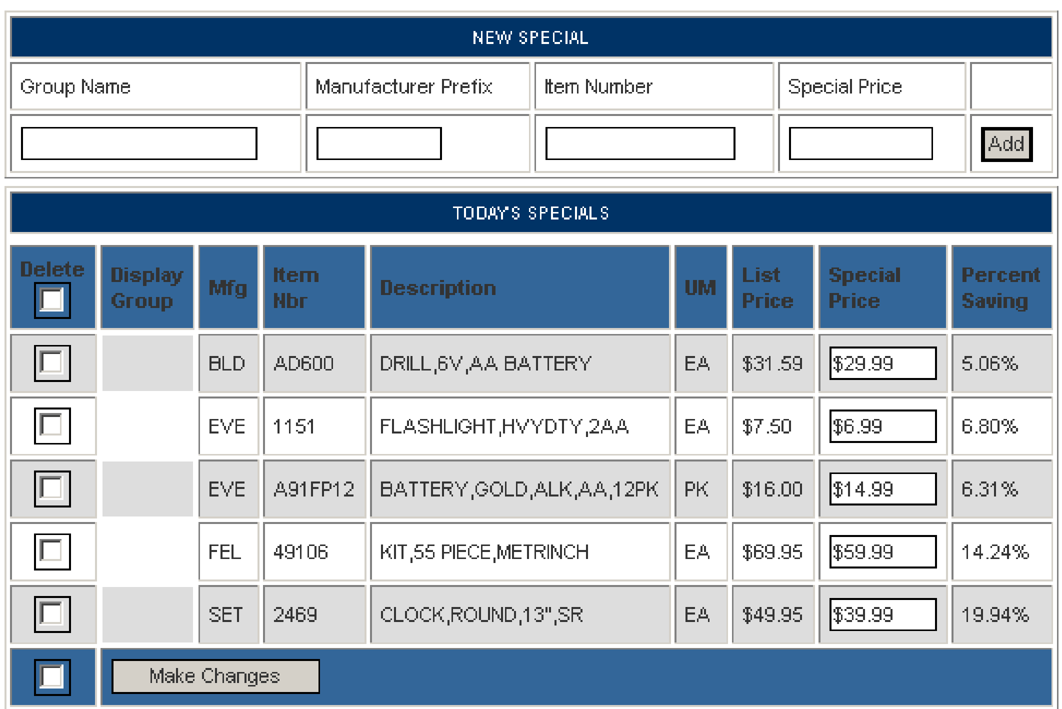
2. After the Dealer Station Control Panel opens, click **Todays Specials**.

   The Today's Special window opens. See Figure 13-1.

3. If you have set up today's special items in the past, they appear in the Today's Special portion of the window. At this point, you can add a new item to the list, or you can change the displayed items. You can also delete a displayed item from the list.

Note: Because you can customize pricing with each individual customer, a special may not be the best price for a particular customer. Your customers always receive the lowest price, whether it is the special price or their regular pricing.

Figure 13-1: The Today's Specials Window



- To add a new item, enter the item's information in the appropriate boxes under the New Special portion of the window. When you finish adding the new item, click Add. You can add as many specials as you would like.
- To change the price of a displayed items, click the Special Price box and enter the new price. When you finish, click Make Changes. The item is saved, along with the new price you specified.
- To delete one of the displayed items, click the Delete check box corresponding to the line item to delete. Click Make Changes.

4 When you finish, click Admin Home to return to the Dealer Station Administrative Control panel.

Chapter 14: Shipping Management

Contents

Using Shipping Management

Use the Shipping Management page to set up different shipping identities and charges. You can set up shipping identities with different shipping rates. For example, you might have an out-of-state shipping identity with a flat rate plus additional charge different from the prices in the in-state shipping identity. You can set up as many identities as you want.

After you set up your shipping identities, you can specify whether to allow your end users the ability to specify how they want their orders delivered on the checkout page. For example, the end user could specify to ship the order using UPS Ground, FedEx, or UPS Blue — any of the shipping identities you set up here. You do this by using the Allow User to Choose Shipping Options box in the Default User Settings and User Accounts pages. If you set this box to Yes, you then use the corresponding Shipping Option List box to specify the identities you want to allow your end users to access. For more information, see **Chapter 9: Default User Settings** and **Chapter 10: User Accounts.**

1 Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

2 After the Dealer Station Control Panel opens, click Shipping Management. The Shipping Management window opens, as shown in Figure 14-1.

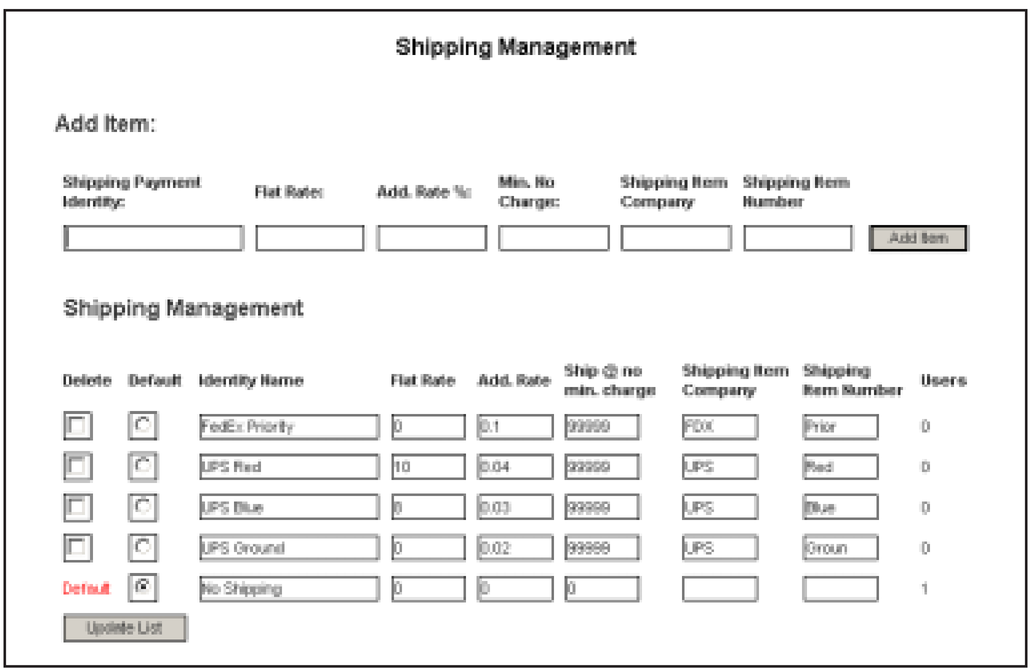


Figure 14-1: The Shipping Management Window

3 If you have set up shipping detail in the past, the information appears in this window. At this point, you can add new shipping information. Complete the following boxes:

- **Shipping Payment Identity:** Enter an unique name for this shipping account, UPS Ground, for example.
- **Flat Rate**: Enter the flat rate amount charged for the items shipped from this shipping account. The only time this flat rate would not be applied is if the customer’s order is the minimum amount specified in the Minimum No Charge box.
- **Add Rate %**: Enter a percentage of the total invoice to add to the flat shipping rate. For example, you might enter three percent of the total order. Please note this is not a percent of the flat rate. You do not have to add an additional rate for each account.
- **Min No Charge**: Enter the minimum amount a customer can spend to avoid a shipping charge. This means that if a customer exceeds the amount you enter in this box, they do not have to pay shipping. For example, if you enter $50.00 in this box and the customer’s order is 48.50, their order is charged a shipping fee. If the total was 55.89, there is no shipping charge applied to the order.
- **Shipping Item Company:** Specify the item company. You must complete this box. The text you enter appears on the printed ticket as a line item. The item company you enter here comes from the Item database. This means the item must be set up in your DDMS system.
- **Shipping Item Number:** Specify the item number. You must complete this box. The text you enter appears on the printed ticket as a line item. The item number you enter here comes from the Item database. This means the item must be set up in your DDMS system.

4 When you finish adding the information, click Add Item. The shipping information you specified is added to the displayed list.

Changing Shipping Management Information

1 Click Shipping Management. The Shipping Management window opens, as shown in Figure 14-1.

2 Click the cursor in the box with the information to change. Enter the new information over the existing information.

3 When you finish, click Update List to save your changes.

Deleting Shipping Management Information

1 Click Shipping Management. The Shipping Management window opens, as shown in Figure 14-1.

2 Click the Delete check box corresponding to the shipping item to delete.

3 Click Update List. The item is removed from the list.

Chapter 15: User/Usage Reports

Contents

Using Usage/User Reports

The Usage / User Reports link functions are similar to the function in the User Accounts window. However, it lets you view usage reports. Usage reports let you track your users' activity. You can search for user reports, as well. You can view a single user report or the complete list.

1 Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**

2 After the Dealer Station Control panel opens, click **Usage/User Reports**. The Display User Reports window opens, as shown in Figure 15-1.

3 At this point, you can search for a specific report, view all reports, or view usage reports.

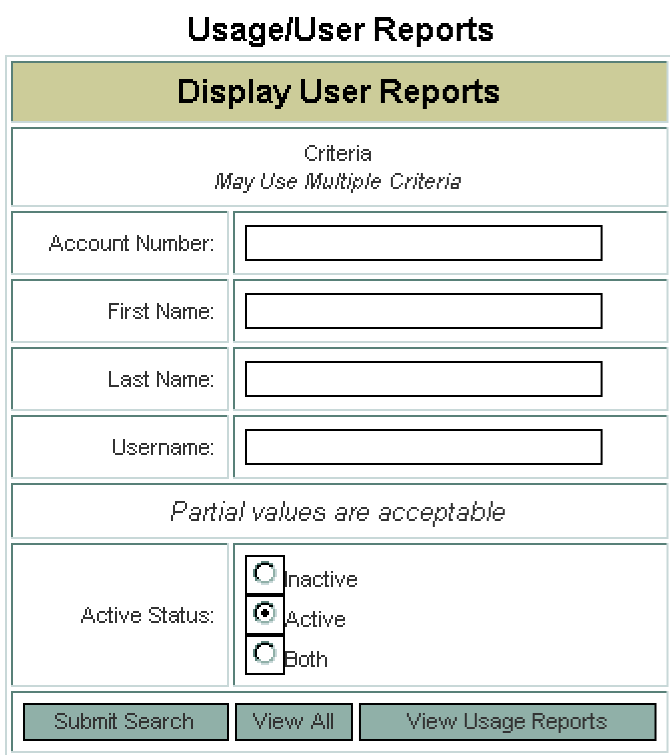


Figure 15-1: The Display User Reports Boxes

- To search for a specific report, use the Account Number through Active Status boxes to specify the information for the report to view. When you finish specifying information, click Submit Search. The user report appears, along with the customer's account number; department number; full customer name; customer's email address; telephone number and extension; user name; user password; and creation date. See Figure 15-2.
- To view usage reports, click View Usage Reports. The usage reports appear, along with the customer's account number; department number; customer's first name; customer's last name; email address; telephone number and extension; user name; user password; date created; last login date and time; the total number of orders, line items, and total order amount for the month-to-date.

4 When you finish, click Admin Home to return to the Dealer Station Administrative Control Panel.

Exporting a User Report

You can export a comma-separated value file (.CSV) of user information, such as email address, phone, extension, user name, account number , and default department. You can use the .CSV file format to import contact data into most spreadsheet, database, email and customer contact management software. Use the following instructions for exporting a user contact:

Figure 15-2: Example of the User Reports Window

User Reports

Account #	Dept #	Fullname	Email	Phone	Ext.	Username	Password	Date Created
1002		First Name, Last Name	test@test.com			demo	demo	2/8/2002 2:05:00 PM
1004		Eric, Patterson	epatterson@eci2.com			eric	eric	10/28/2004 1:03:00 PM
1004	101	lewis, bass	lbass@eci2.com			lbass	lbass	10/27/2004 5:00:00 PM
TEST		dealer, added				added	1234	11/1/2004 5:00:00 PM
TEST		approver, test	bbentle@eci2.com			approver	approver	10/27/2004 11:06:00 AM
TEST		needapproval, test	bbentle@eci2.com			needapproval	1234	10/27/2004 11:13:00 AM

1. Select a User Report or click View All to view all the reports.
2. Click the View This Report in a Spreadsheet link.
3. Select whether to open the .CSV file or save it to your computer.
   - If you click Open, the same message repeats. Click Open again. The Report displays.
   - If you click Save, select where to save the file and assign the file a unique name. Click Save.

Chapter 16: Item Management

Contents

Using Item Management

Item Management lets you add items to the catalog and provide as much or as little information about the item as you want. You can also upload a picture and thumbnail image of the item. Items in Item Management go into the site-specific catalog. When your end-users add an item to their cart that is not found in any catalog, the item is automatically added to Item Management. This lets the user search the browse catalog section and find the item without you taking the time to manually enter it.

Note: The item must exist in your DDMS system.

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1 Log into the Dealer Station Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**

2 After the Dealer Station Control Panel opens, click **Item Management**.

The Item Management window opens, as shown in Figure 16-1.

3 When this window opens, you can add an item to the catalog. You can also place items in groups and change item information.

- To add a new item, enter the item's manufacturer prefix in the Mfg Prefix box and the item's number in the Item Number box. Click Add Item.

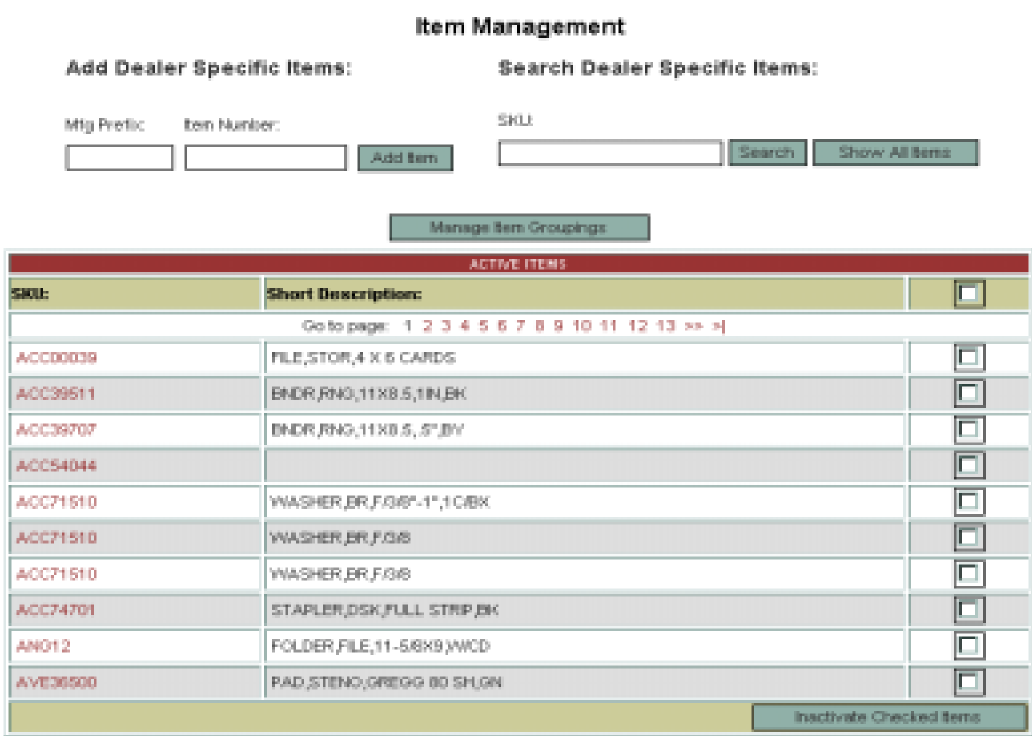


Figure 16-1: The Item Management Window

- To specify grouping for an item, click the item's SKU number.
- To change an existing item, click the item's SKU number in the Active Items list.

4 The item you specified appears in a new window, along with additional boxes for you to complete. See Figure 16-2. To begin grouping items, go to the heading **Placing Items in Groups**.

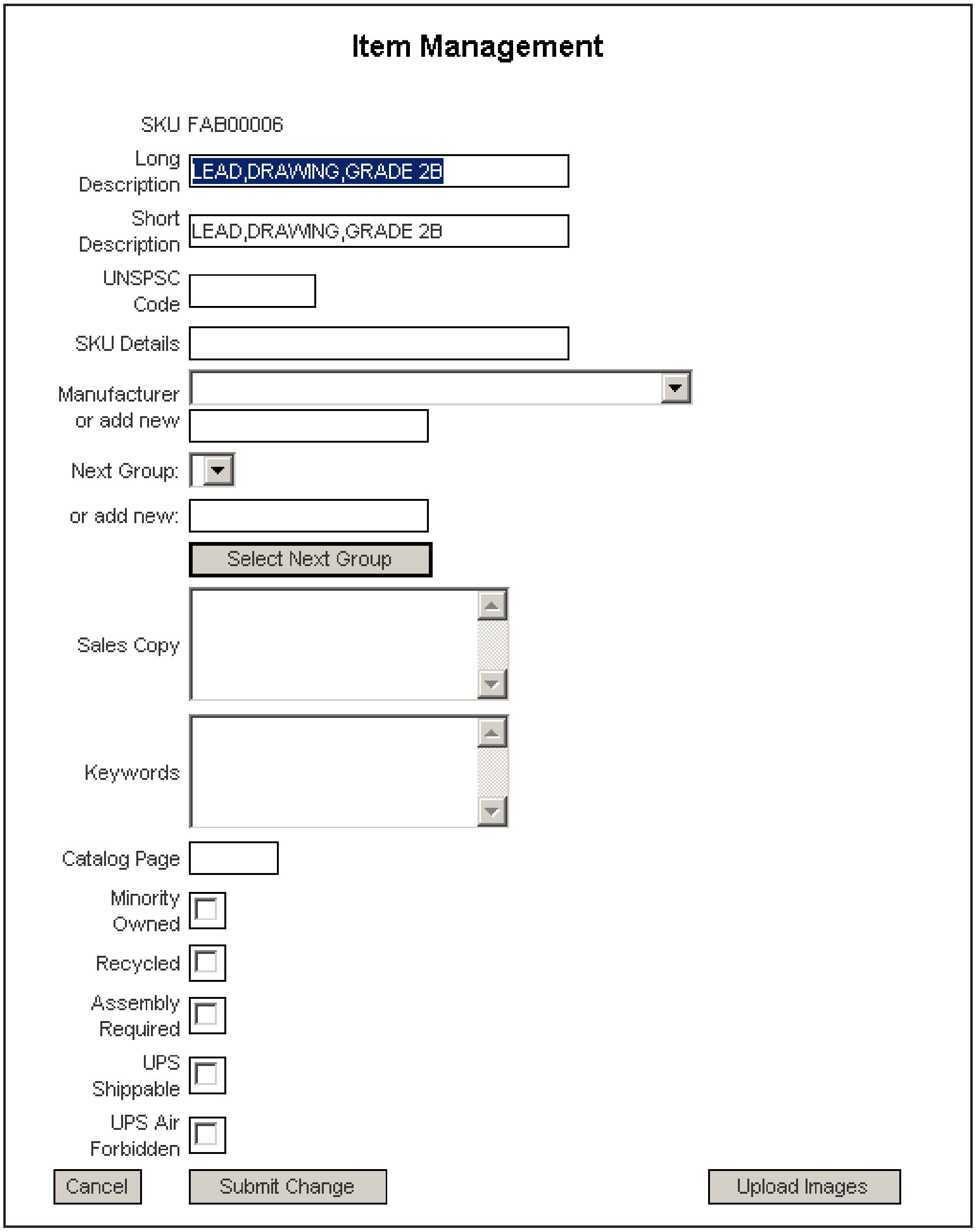


Figure 16-2: Specifying Information for the Item

To add or change information, press Tab or click each box for which to enter item information. You can now add or change information for that item, including the following:

- In the SKU box, enter the number you entered in the manufacturer prefix and item number box.
- In the Long Description box, enter a description of the item.
- In the Short Description box, enter a description of the item.
- The UNSPSC Code box displays the SKU number.
- In the Manufacturer / Or Add New box, enter the name of the manufacturer or select a manufacturer from the drop down list.
- In the Next Group drop down list box, select an item group used for an end-users catalog search. Groups must be set up in Manage Item Groupings. To place an item in a group, see the heading **Placing Items in Groups**.
- In the Or Add New box, enter a new group name.
- In the Sales Copy box, enter information about the item. The information should be similar to a sales pitch. This information appears when the end-user clicks an item.
- In the Keywords box, enter keywords a customer can use to search for the product. The changes made to this box cannot be seen until the next day.
- In the Catalog Page box, enter the page number where this item appears in the manufacturer's catalog. You can specify up to four alphanumeric characters in this box. Information you specify here appears on the end-user's Item Details page.
- Check the Minority Owned box if the product is produced by a minority-owned company.
- Check the Recycled box if the product is made from recycled materials.
- Check the Assembly Required box if the product requires assembly.
- Check the UPS Shippable box if the product can be shipped by United Parcel Service.
- Check the UPS Air Forbidden box if the product can be shipped by UPS Air (United Parcel Service).

As you are selecting groups for your items, be sure not to click Clear Groups. This erases all the groups you have set for this item.

Using Group Management

Group Management lets you modify your item groups and the groups within their various levels. To access Group Management, click Manage Item Groupings in the Item Management window. When the Group Management window opens, the currently selected group, and the number of items associated with that group, display at the top of the window. See Figure 16-3. Use the following instructions to modify your item groups:

Modifying a Group Name

To change the name of a group:

1. Click the text box of the group to change. Enter the new name.
2. To save this new name, click the checkbox next to the group name and click Rename.

To access the other groups within a group, click group name link. When you click a group name link, the next level of groups appears. If there are no groups at a particular level, the system notifies you.

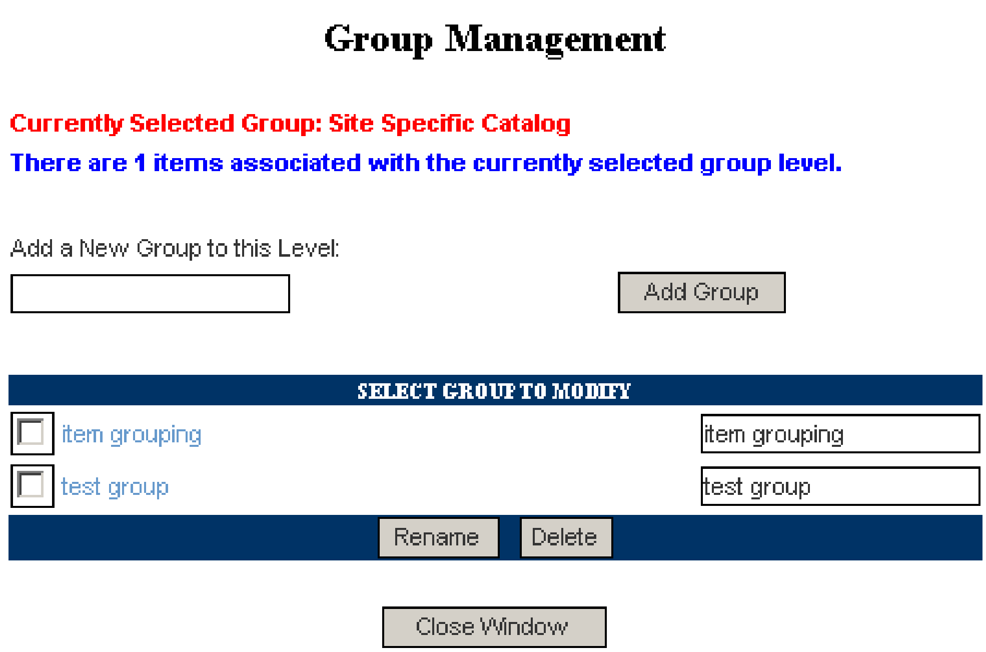
Note: To return to the beginning, click the Top link which appears above the Select Group to Modify box. To return to the previous group level, click the group link above the Select Group to Modify box.

Adding a New Group

You can add a new group at any level.

1. In the Add a New Group To This Level box, enter the name of the new group.

Figure 16-3: The Group Management Window



Note: If you are adding a group to an existing group, click the group link to open it. If you do not open the group you are adding to, the new group is not added.

2 When you finish adding a group, click Add Group.

Renaming a Group

You can rename a group from the Group Management window.

1 Click the box to the right of the item group to rename.

2 Enter the new name over the existing name.

3 Click Rename. The item group is renamed.

Deleting a Group

You can delete a group from the Group Management window.

1 Click the checkbox next to the item group to delete.

2 Click Delete. The item is deleted.

Placing Items in Groups

After you finish adding or changing information for an item, you can place your items in groups. Placing items in groups helps your customers when they are searching for an item. These groups are used to browse the catalog.

Note: Before placing items in groups, you must have groups set up in Manage Item Groupings.

1 In the Item Management window, shown in Figure 16-2, select your first group in the Next Group drop down list. For example, if your item is paper clips, choose Paper, Pens and Desk Supplies. This is the first search group your customers choose from to find paper clips in the catalog. You can also add a new group in the Or Add New text box.

2 After you choose the first grouping, click Select Next Group.

3 A new window opens, displaying the first grouping you specified. Choose the second grouping for this item from the Next Group drop down list, or you can enter a new group in the Or Add New text box. Using paper clips as the example, you could choose Clips and Clamps as the second search group your customers choose from to find paper clips in the catalog.

4 After you choose the second grouping, click Select Next Group.

5 A new window opens, displaying the first and second groupings you specified. Select a third search group for your item from the Next Group drop down list box, or you can enter a new group in the Or Add New

text box. If the item is paper clips, you could choose Paper as the third group for your customers to search in the catalog. After you choose the third grouping, click Select Next Group.

6. A new window opens, displaying the first, second and third groupings you specified. Choose the final group your customers can choose from in the catalog as they search for the item.
7. When you finish selecting groups, click Submit Change.
8. To return to the Dealer Station DDMS Edition Administrative Control Panel, click Admin Home.

Clearing Groups Assigned to an Item

You can change the groups to which the item is assigned.

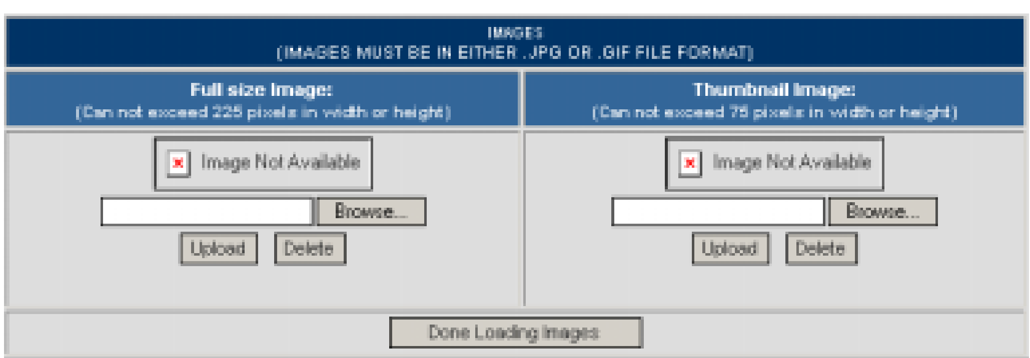
1. From Item Management, select the item to change.
2. The item's details display.
3. To clear the groups, click Clear Groups.
4. The groups are deleted from the item.

Uploading Images

You can upload an image of the items you add to the catalog.

1. In the Item Management window, click Upload Images.
2. The Images window opens, as shown in Figure 16-4. You can add a full size image, thumbnail image or both.
   - To add a full size image, click Browse in the Full Size Image box. Select the picture to add. Click Upload.
   - To add a thumbnail image, click Browse in the Thumbnail Image box. Select the picture to add. Click Upload.

Figure 16-4: The Images Window



Note: Thumbnail images should not exceed 75x75 pixels, and full size images should not exceed 225x225 pixels.

3 Click Done Loading Images when you finish.

Deleting Images

You can delete an uploaded image you have added to the catalog.

1 In the Item Management window, click Upload Images.

2 The Images window opens, as shown in Figure 16-4. You can delete a full size image, thumbnail image or both.

- To delete a full size image, click Browse in the Full Size Image box. Select the picture to delete. Click Delete.
- To delete a thumbnail image, click Browse in the Thumbnail Image box. Select the picture to delete. Click Delete.

3 Click Done Loading Images when you finish.

Chapter 17: PSN Monitor

Contents

Using PSN Monitor

You can use PSN Monitor to oversee and review PSN transactions through Dealer Station. The PSN Totals page gives you an overview of your PSN activity, broken down by vendor, for today or for the month to date. You can see at a glance the number of successful transactions, as well as those that were incomplete or failed.

The PSN Transactions page shows details about each transaction, including items on the P/O.

To view PSN Totals:

1. Log onto the Dealer Station Administrative Control panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**
2. In the Dealer Station Control Panel, click PSN Totals.
3. The PSN Totals web page opens, as shown in Figure 17-1. A grid displaying vendors, today's transaction totals, and the month-to-date transaction totals appears. It also shows the number of successful, incomplete and failed (error) transactions for each vendor.

   The and at the top of each column let you sort the information in ascending or descending order. For example, to see the MTD totals in descending order (from most to least), click in the Total column in the MTD's Transaction end of the grid. To see the vendor to whom you sent the fewest incomplete transactions today, click in the Incomplete column in the Today's Transactions section.

Figure 17-1: The PSN Totals Page

Vendor Transaction Totals for DDMS Test Source / TEST								
VENDOR	TODAY'S TRANSACTIONS				MTD'S TRANSACTIONS			
	TOTAL	SUCCESSFUL	INCOMPLETE	ERROR	TOTAL	SUCCESSFUL	INCOMPLETE	ERROR
Xstamper Rubber Stamps	0	0	0	0	0	0	0	0
United Stationers (Canada)	0	0	0	0	0	0	0	0
United Stationers	0	0	0	0	1	1	0	0
Synnex Information Technologies Inc.	0	0	0	0	1	1	0	0
S.P. Richards Company	1	1	0	0	5	5	0	0
OPUS	0	0	0	0	0	0	0	0
Lagasse Brothers Inc.	0	0	0	0	0	0	0	0
Emco Sales and Service	0	0	0	0	1	0	0	1
Distribution Management, Inc.	0	0	0	0	0	0	0	0
Daisytek International (Canada)	0	0	0	0	0	0	0	0
Daisytek International	0	0	0	0	0	0	0	0
Allsteel Furniture	0	0	0	0	0	0	0	0
Grand Total	1	1	0	0	8	7	0	1

Note: A red ▼ or ▲ indicates the current sort.

4 When you finish, click **Admin Home**.

To view PSN Transactions:

1 Log onto the Dealer Station Administrative Control panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**

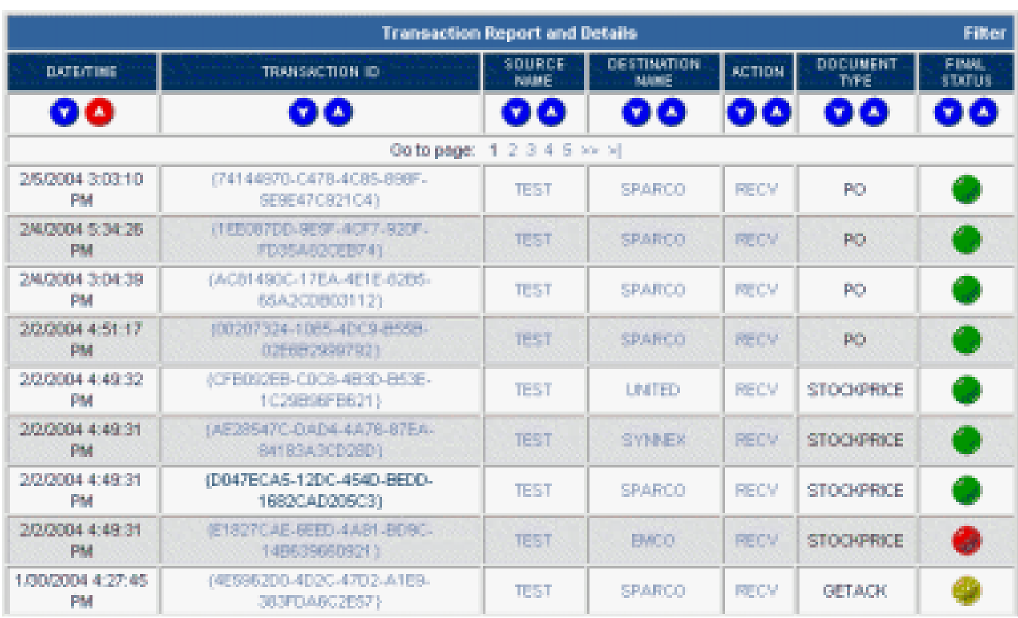
2 In the Dealer Station Control Panel, click **PSN Transactions**.

3 The PSN Transactions web page opens, as shown in Figure 17-2.

4 A grid displays the transaction report and details for all your transactions. To limit the report to a transaction or a group of transactions, see **Using Filters**.

The ▼ and ▲ at the top of each column let you sort the information in ascending or descending order. For example, to see the transactions in descending order (from most recent backward), click ▲ in the Date/Time column. To see transactions by vendor alphabetically (in ascending order), click ▼ in the Destination Name column.

Note: A red ▼ or ▲ indicates the current sort.



Transaction Report and Details — Filter

DATE/TIME	TRANSACTION ID	SOURCE NAME	DESTINATION NAME	ACTION	DOCUMENT TYPE	FINAL STATUS
Go to page: 1 2 3 4 5 >> >|						
2/5/2004 3:03:10 PM	{74144970-C478-4C85-898F-9E9E47C821C4}	TEST	SPARCO	RECV	PO	
2/4/2004 5:34:26 PM	{1EE087DD-9E9F-4CF7-920F-FD35A82CEB74}	TEST	SPARCO	RECV	PO	
2/4/2004 3:04:39 PM	{AC81490C-17EA-4E1E-8266-65A2CDB03112}	TEST	SPARCO	RECV	PO	
2/2/2004 4:51:17 PM	{00207324-1065-4DC9-B55B-02E6B2909792}	TEST	SPARCO	RECV	PO	
2/2/2004 4:49:32 PM	{CFB092EB-C0C8-483D-B53E-1C29B96FB621}	TEST	UNITED	RECV	STOCKPRICE	
2/2/2004 4:49:31 PM	{AE28547C-0AD4-4A78-87EA-84183A3CD28D}	TEST	SYNNEX	RECV	STOCKPRICE	
2/2/2004 4:49:31 PM	{D047ECA5-12DC-454D-BEDD-1682CAD205C3}	TEST	SPARCO	RECV	STOCKPRICE	
2/2/2004 4:49:31 PM	{E1827CAE-6EED-4A81-BD9C-14B639660921}	TEST	EMCO	RECV	STOCKPRICE	
1/30/2004 4:27:45 PM	{4E5962D0-4D2C-47D2-A1E9-383FDA6C2E57}	TEST	SPARCO	RECV	GETACK	

Figure 17-2: The PSN Transactions Page

- **Date/Time:** This shows the date and time of the transaction.
- **Transaction ID:** This shows the transaction's unique code. Click the transaction ID for details about the transaction. Details include time, status, message and queue.
- **Source Name:** This is the machine sending the transaction. Click the source name
- **Destination Name:** This is the vendor to whom you're sending the transaction.
- **Action:** This is the type of transaction.
  - **Query:** Inquire if the data exists.
  - **Recv:** Download data.
  - **Send:** Upload data.
  - **Updstatus:** Update the transaction's status code .
- **Document Type:** This is the item that was sent, received or inquired about.
  - **File:** Refers to any file from an FTP site.
  - **Getack:** Request an acknowledgement.
  - **Invoice:** Refers to an electronic invoice.
  - **P/O:** Refers to a purchase order.
  - **Price:** Check the price of an item.
  - **Stock:** Find out if the item is in stock.
  - **Stockprice:** Check the price and the stock status.
- **Final Status:** This is the disposition of the transaction.
  - (green) is a successful transaction.
  - (yellow) indicates the tranaction is incomplete.
  - (red) indicates the transaction failed.

5 When you finish, click Admin Home.

Using Filters

To see a single transaction or a group of transactions, rather than all of them, you can set filters to include or exclude transactions.

1. In the PSN Transactions web page, click Filter.
2. The Filtering Tool for Transaction Records page opens. See Figure 17-3. Use the dialog boxes to limit the transactions that appear. You can limit by:
    - Date/time
    - Destination name
    - Action
    - Document type
    - Return code
    - Final status.
3. When you finish, you can view the transactions that meet your limits, return to the Transaction Report and Details page without setting any limits, or clear the limits you set and start over.
    - To view the Transaction Report and Details page with the transactions that meet your limits, click Save Filter and View Transactions.
    - To exit the Filtering Tool page without setting any limits, click Cancel.
    - To clear the limits you selected, click Clear Filter.

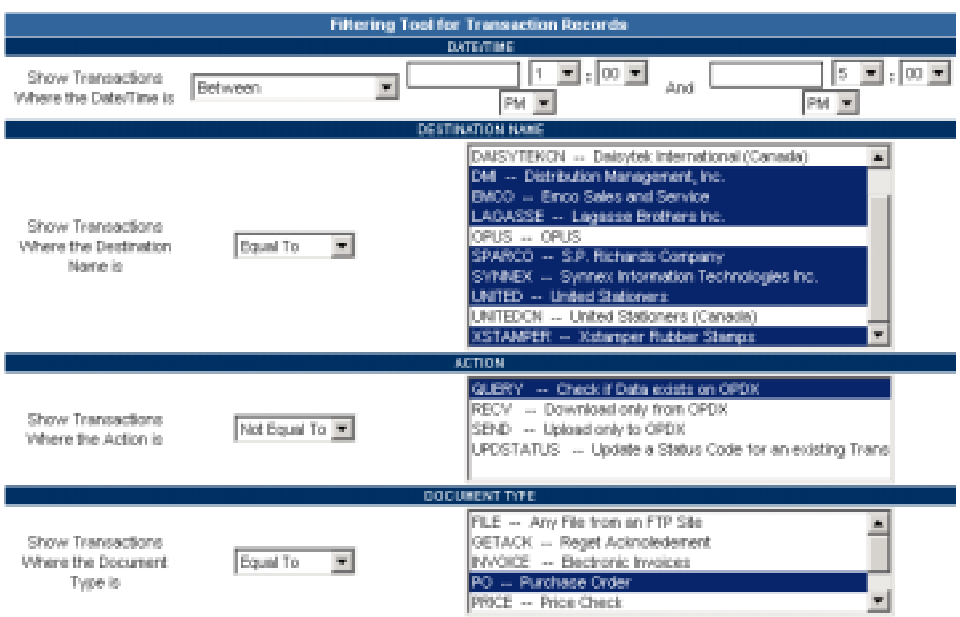


Figure 17-3: The Filtering Tool for Transaction Records Page

Date/Time Filter

The Date / Time dialog box lets you limit transactions to those before, during or after a certain period. See Figure 17-4.

1 In the Show Transactions Where the Time / Date Is box, click the down arrow. From the drop down list, click the appropriate filter. For example, suppose you are limiting the report to transactions made on February 4, 2004 at 1:09 PM. You would click Equal To in the Show Transactions Where the Time / Date Is box.

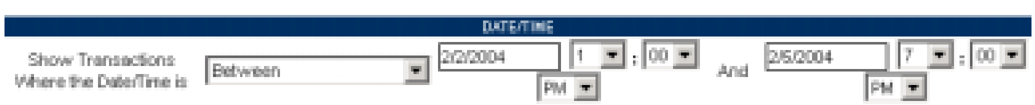
- **Between:** Show transactions made during a particular time period. When you click Between, a second set of date and time boxes appear. Use them to enter the ending date and time.
- **Less Than:** Show transactions made before this date and time.
- **Less Than or Equal To:** Show transactions made before or at this date and time.
- **Greater Than:** Show transactions made after this date and time.
- **Greater Than or Equal To:** Show transactions made at or after this date and time.
- **Equal To:** Show transactions made at this date and time.

2 In the unlabeled box next to the Show Transactions Where the Time / Date Is box, enter the date to which to limit the report. Enter it in mm / dd / yyyy format. Using our example of a date limit of February 4, 2004, you would type 02 / 04 / 2004.

3 The two dropdown list boxes to the right of the date box are the time boxes. In the first box, click the down arrow to select the hour. In the second box, click the down arrow to select the minute. You can set limits in one-minute increments.

To set the time limit in our example of 1:09, you would select 1 from the first list box and 09 from the second.

Figure 17-4: The Date/Time Filter



4 Use the drop down list box below the time boxes to indicate whether the time specified is morning or evening. For the hours between midnight and noon, click AM. For the hours between noon and midnight, click PM.

5 If you clicked Between in the Show Transactions Where the Time / Date Is box, a second set of date and time boxes appear. Repeat **Steps 2 - 4** to specify the ending date and time.

6 You can add another filter, process the report with the current filter, exit the page or clear the filters and start over.

Destination Name Filter

The Destination Name dialog box lets you limit the transactions report by trading partner. See Figure 17-5.

1 In the Show Transactions Where the Destination Name Is box, click the down arrow. From the drop down list, click the appropriate filter. For example, to show transactions with all trading partners except one, click Not Equal To.

   - **Equal To:** Include these trading partners.
   - **Not Equal To:** Exclude these trading partners.

2 The box to the right of the Show Transactions Where the Destination Name Is box shows all your trading partners. Click the names to include or exclude. To highlight sequential names, click the first name to select, then press Shift and click the last name to select. To highlight non-sequential names, press Ctrl and click the names to select.

3 You can add another filter, process the report with the current filter, exit the page or clear the filters and start over.

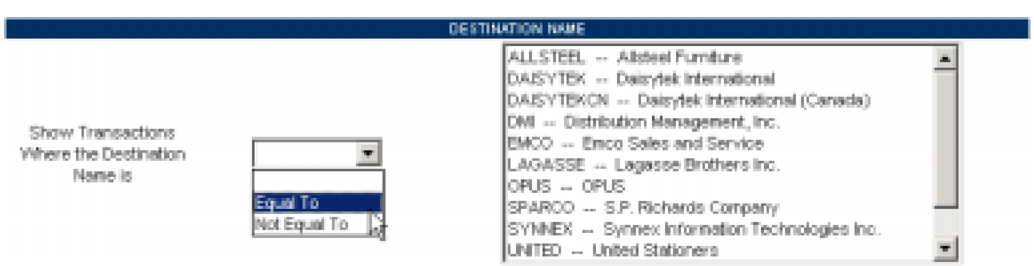


Figure 17-5: The Destination Name Filter

Action Filter

The Action dialog box lets you limit the transactions report by the type of transaction. See Figure 17-6.

1 In the Show Transactions Where the Action Is box, click the down arrow. From the drop down list, click the appropriate filter. For example, to show all transactions you've sent, click Equal To.

   - **Equal To:** Include these actions.
   - **Not Equal To:** Exclude these actions.

2 The box to the right of the Show Transactions Where the Action Is box includes a list of possible actions. You can select one action, some or all. Click the ones to include or exclude. To highlight sequential actions, click the first one to select, then press Shift and click the last one to select. To highlight non-sequential actions, press Ctrl and click the ones to select. The possible actions include:

   - **Query:** Inquire if the data exists.
   - **Recv:** Download data.
   - **Send:** Upload data.
   - **Updstatus:** Update the transaction's status code .

3 You can add another filter, process the report with the current filter, exit the page or clear the filters and start over.

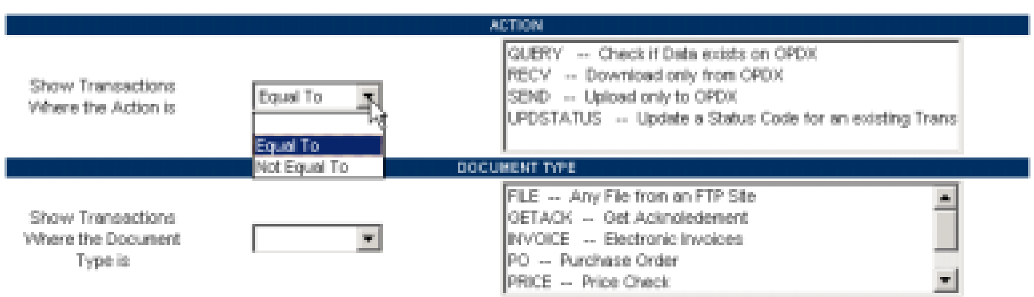


Figure 17-6: The Action and Document Type Filters

Document Type Filter

The Document Type dialog box lets you limit the transactions report by the item sent, received or inquired on. See Figure 17-6.

1 In the Show Transactions Where the Document Type Is box, click the down arrow. From the drop down list, click the appropriate filter. For example, to show all all documents types except queries, click Not Equal To.

- **Equal To:** Include these document types.
- **Not Equal To:** Exclude these document types.

2 In the box to the right of the Show Transactions Where the Document Type Is box is a list of possible document types. You can select one document type, some or all. Click the ones to include or exclude. To highlight sequential document types, click the first one to select, then press Shift and click the last one to select. To highlight non-sequential document types, press Ctrl and click the ones to select. The possible document types include:

- **File:** Refers to any file from an FTP site.
- **Getack:** Request an acknowledgement.
- **Invoice:** Refers to an electronic invoice.
- **P/O:** Refers to a purchase order.
- **Price:** Check the price of an item.
- **Stock:** Find out if the item is instock.
- **Stockprice:** Check the price and the stock status.

3 You can add another filter, process the report with the current filter, exit the page or clear the filters and start over.

Return Code Filter

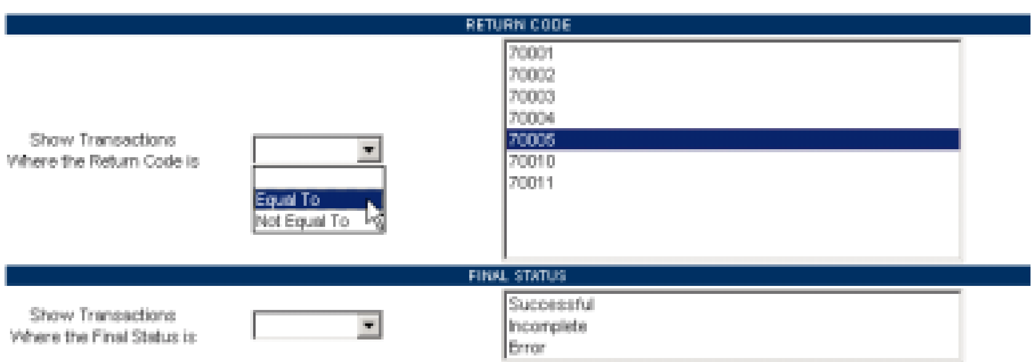
The Return Code dialog box lets you limit the transactions report by the type of transaction. See Figure 17-7.

1 In the Show Transactions Where the Return Code Is box, click the down arrow. From the drop down list, click the appropriate filter. For example, to show all transactions with a particular return code, click Equal To.

   - **Equal To:** Include these return codes.
   - **Not Equal To:** Exclude these return codes.

2 The box to the right of the Show Transactions Where the Return Code Is box includes a list of possible return codes. You can select one return codes, some or all. Click the ones to include or exclude. To highlight sequential return codes, click the first one to select, then press Shift and click the last one to select. To highlight non-sequential return codes, press Ctrl and click the ones to select.

Figure 17-7: The Return Code and Final Status Filters



The available return codes include:

Return Code	Action	Reason
70001	Continue	Transaction received by PSN
70002	Continue	Transaction sent to destination
70003	Continue	Waiting for vendor to process order
70004	Continue	Vendor processing order
70005	Process Acknowledgement	Order process acknowledgement attached
70006	Abort	Timeout — Request acknowledgement later
70007	Abort	Timeout — Order cancelled
70008	Abort	Stock / Price check invalid data returned
70009	Continue	Timeout — Looking for file on FTP site
70010	Continue	Transaction complete — Send from client
70011	Continue	Transaction complete — Response from server; request updated on server

3. You can add another filter, process the report with the current filter, exit the page or clear the filters and start over.

Final Status Filter

The Final Status dialog box lets you limit the transactions report by the type of transaction. See Figure 17-7.

1. In the Show Transactions Where the Final Status Is box, click the down arrow. From the drop down list, click the appropriate filter. For example, to show all transactions with a particular return code, click Equal To.
    - **Equal To:** Include these statuses.
    - **Not Equal To:** Exclude these statuses.

2 The box to the right of the Show Transactions Where the Final Status Is box includes a list of possible statuses. You can select one status, two or all three. Click the ones to include or exclude. The available final statuses are:

- **Successful:** The transaction succeeded.
- **Incomplete:** The transaction is unfinished.
- **Error:** The transaction failed.

3 You can add another filter, process the report with the current filter, exit the page or clear the filters and start over.

Chapter 18: Search Sort

Contents

Using Search Sort

Search Sort lets you arrange items in a particular order. Use it to set the priority of items that appear in a search display results list. Enter the item's SKU number at the top of the list. When your customers search for that type of item, the one at the top of the list displays first.

This is a valuable tool to use for customers stocking items or for key value items.

Use the following instructions:

1 Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**

2 After the Dealer Station Control panel opens, click Search Sort .

The Search Sort window opens, as shown in Figure 18-1.

3 Enter the item to add to the list. In the Add New SKU boxes, enter the first three letter of the SKU (item number), for example, PIL. Press Tab and enter the rest of the number in the second box, for example, 30040.

4 When you finish, click Add SKU >>. Repeat these steps for all the items to add.

Note: You do not have to add the items in the order you want them to appear. They can be prioritized once they appear in the main box. See the instructions below.

---

5 Once the items appear in the main box on the right, you can arrange them as you like. First, highlight the SKU of the item to move. There are two ways to arrange items:

- **Arrows:** Use the up and down arrow keys on the right side of the box. Click /\ to move the item up one line at a time. Click V to move the item down one line at a time. Keep clicking the arrows until you have the items in the correct order.
- **Max and Min buttons:** Use these buttons to place an item at the top or bottom of a list without moving them one line at a time. Click MAX to move an item to the top of the list and click MIN to move an item to the bottom of the list.

6 Once the items are set in the proper order, click Set Priority to save the order.

Note: To remove an item from the list, highlight the SKU and click << Remove SKU.

To select all the items in the list, click Select All SKU.

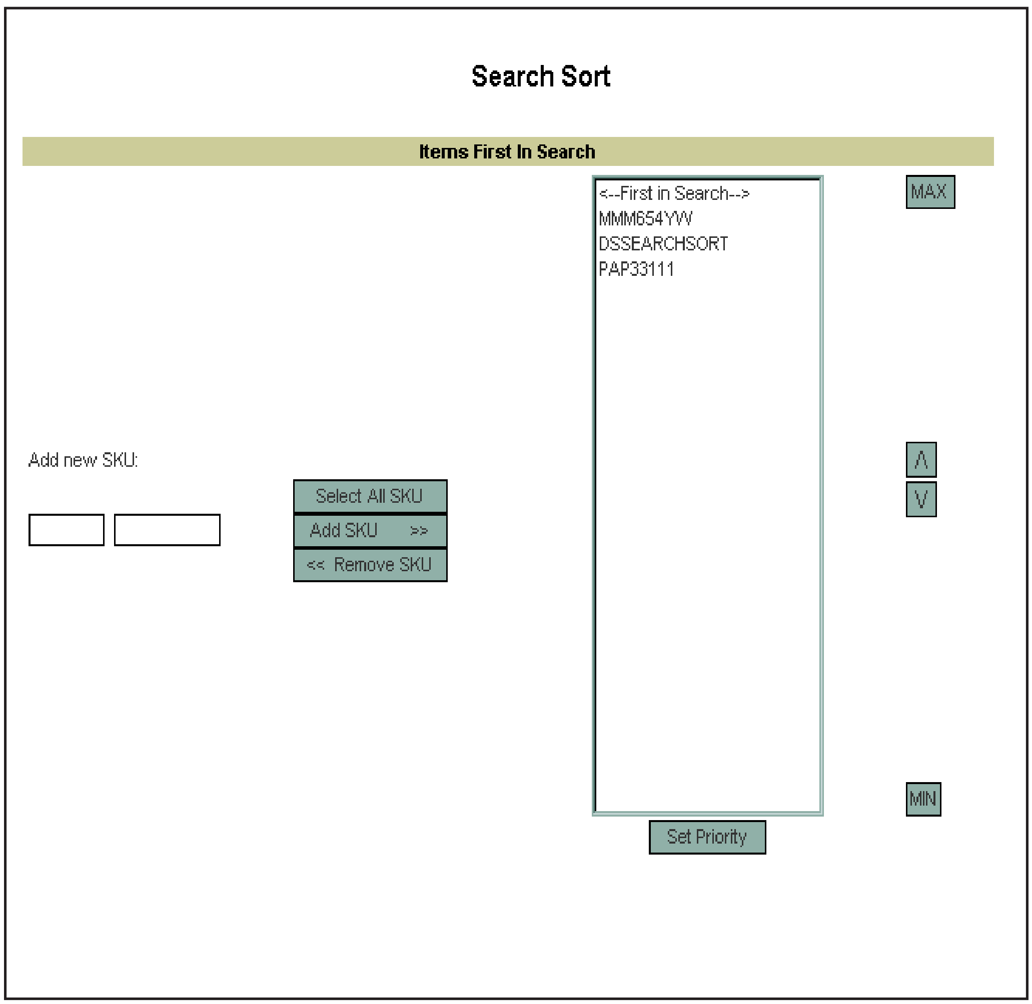


Figure 18-1: Search Sort Window

Chapter 19: Customize Images

Contents

Customizing Images

Not only can you set the text, preferences, styles and information to customize your site, you can also upload images to use as a logo or as a colorful graphic in other areas of your site. It is just another way to customize your site to appeal to your customers.

Uploading an image is a quick and easy process. A few clicks can add a whole new look to your web site.

1 Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station**.

2 After the Dealer Station Control Panel opens, click Customize Images. The Customize Images window opens, as shown in Figure 19-1.

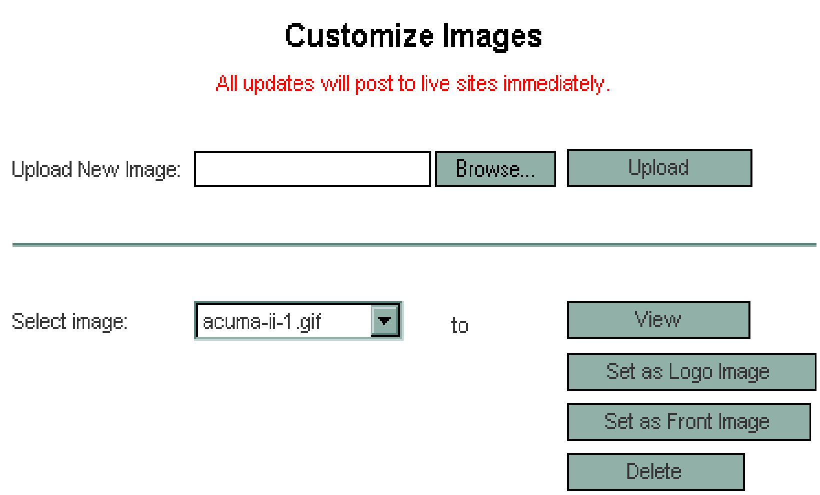


Figure 19-1: The Customize Images Window

3 In the Upload New Image portion of the window, click Browse and locate the item to upload.

Note: The maximum size for your logo depends on the template you chose earlier. For more information, see **Chapter 4: Site Style**.

All image updates post to live sites immediately.

4 When the appropriate item is selected, click Upload.

5 In the Select Image list box, click the down arrow and choose an image. There are four different ways to place the image:

- To view the image immediately, click View.
- To make the image appear as your logo throughout the web site, click Set As Logo Image.
- To make the image appear on the login page, click Set as Front Image.

Note: The Front Image size should be 196 x 213 pixels in a .jpg or .gif format.

- To delete the image, click Delete.

6 When you finish, click Admin Home to return to the Dealer Station Administrative Control Panel.

Chapter 20: Marketing Tools

Contents

Using Marketing Tools

The Marketing Tools section helps you promote your web site and eCommerce ordering. You can offer promotions such as free goods, samples, and gifts added to a customer’s order based on different qualifying amounts. For example, you can send a free coffee mug to any customer who meets an order amount of $100. You can also set up one-time or reusable coupons and site-wide discounts to apply to orders.

1. Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**
2. After the Dealer Station Control Panel opens, click Marketing Tools.

There are three kinds of marketing tools:

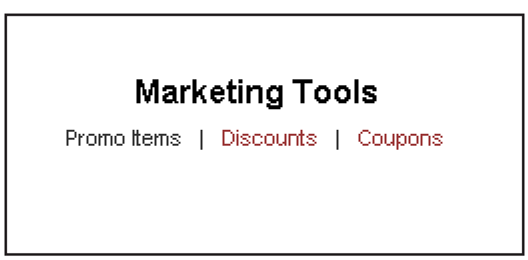
- Promo items
- Discounts
- Coupons.

Promo Items

This section lets you add promotional items (such as coffee mugs or gift baskets) to a customer’s order, based on order qualifications.

1. When the Marketing Tools page opens, it defaults to the Promo Items page. If it does not, click the Promo Items link. See Figure 20-1.
2. Complete the boxes in the Add Promotion section for each promotional item to set up. See Figure 20-2.
   - **Description:** Enter a unique description for this type of promotional item. For example, if you are offering free coffee mugs, you could enter Coffee Mug.
   - **Promo Type:** Assign this promotion a type. Select from the drop down list box.

Figure 20-1: The Marketing Tools Links



- **Order Total:** The promo item is added to the order for users who place orders meeting the qualifying amount.
- **MTD Order:** The promotional item is added to the order for users who place orders meeting the qualifying month-to-date amount.
- **First Time User:** The promotional item is added to the order for users who place their first order on Dealer Station.

Note: All items on a customer's order must be valid items in DDMS and in-stock for them to be added to the order.

- **Qualifying Amount:** Enter the total dollar amount a customer must reach to receive the promotional item.
- **Item Co:** Enter the manufacturer of the item you are giving away.
- **Item #:** Enter the number of the item you are giving away.
- **Expiration Date:** Enter the date this promotion ends.

3 When you complete the boxes, click Add.

4 The item is added to the list of active promotions.

Inactivating/Reactivating Promotions

Once you have set up a promotional item, it displays in the active promotions section. You can stop a promotion any time, and reactivate them, as well.

1 From the Marketing Tools - Promo Items window, select the promo item to inactivate from the Active Promotions list. See figure 20-3.

2 Click the Inactive button that corresponds to the item you selected.

3 The item moves to the Inactive Promotions section.

4 To reactivate the item, click the Reactivate button corresponding to the item selected.

5 The item moves back to the Active Promotions list.

Figure 20-2: The Add a Promotion Box

Deleting Promotions

You can also delete a promotion if you no longer offer it. Use the following instructions:

1 From the Marketing Tools - Promo Items page, select the promo item to delete from the Inactive Promotions list.

Note: The item to delete must be inactivated before it can be deleted. For instructions, see **Inactivating/Reactivating Promotions.**

---

2 Click the Delete button corresponding to the item to delete.

3 The message "Promotion of XX deleted" displays at the top of the page.

Discounts

It's easy to give your customers items on sale or discounted orders. One way to do this is through Discounts and Coupons. Discounts let you apply discounts to orders. Discounts can be active or inactive and like promotions, they can apply to first time users, the month to date order total, or on the entire order total.

1 From the Marketing Tools page, click the Discounts link. See Figure 21-1.

2 The Discounts page opens. See Figure 21-4. At this point, you can specify whether you want to set up a Order Discount, Month to Date Order Discount, or a First Time User Order Discount.

Order total discounts are added to the order for users who place orders meeting the qualifying amount. Month to date order discounts are added to the order for users who place orders meeting the qualifying month-to-date amount. And first time user discounts are added to the order for users who place their first order and who meet the qualifying amount.

Complete the following boxes for each discount type you want to set up:

- **InActive:** This box displays the status of the discount. It is either marked Yes for active or No for inactive.

Figure 20-3: The Active Promotions List

ACTIVE PROMOTIONS

Description:	Promo Type:	Qualifying Amount:	Item Co:	Item #:	Expiration Date:	
Free Mug	Order Total	$150.00	DS	PROMOORDERTOTAL	12/31/2009	Inactivate
MONTHLY ITEM	MTD Order Total	$1,000.00	DS	PROMOMTDITEM	12/31/2003	Inactivate

If you set both a discount and dollar amount, the system uses the dollar amount you specify as the discount.

- **Discount by Percentage:** To apply a discount using a percentage, enter the percent in this box. For example, to apply a 20% discount to each order, enter a .2 in this box.
- **Discount by Dollars:** To apply a discount by dollar amount, enter the amount in this box. For example, to take $5 off each order, enter 5 in this box.

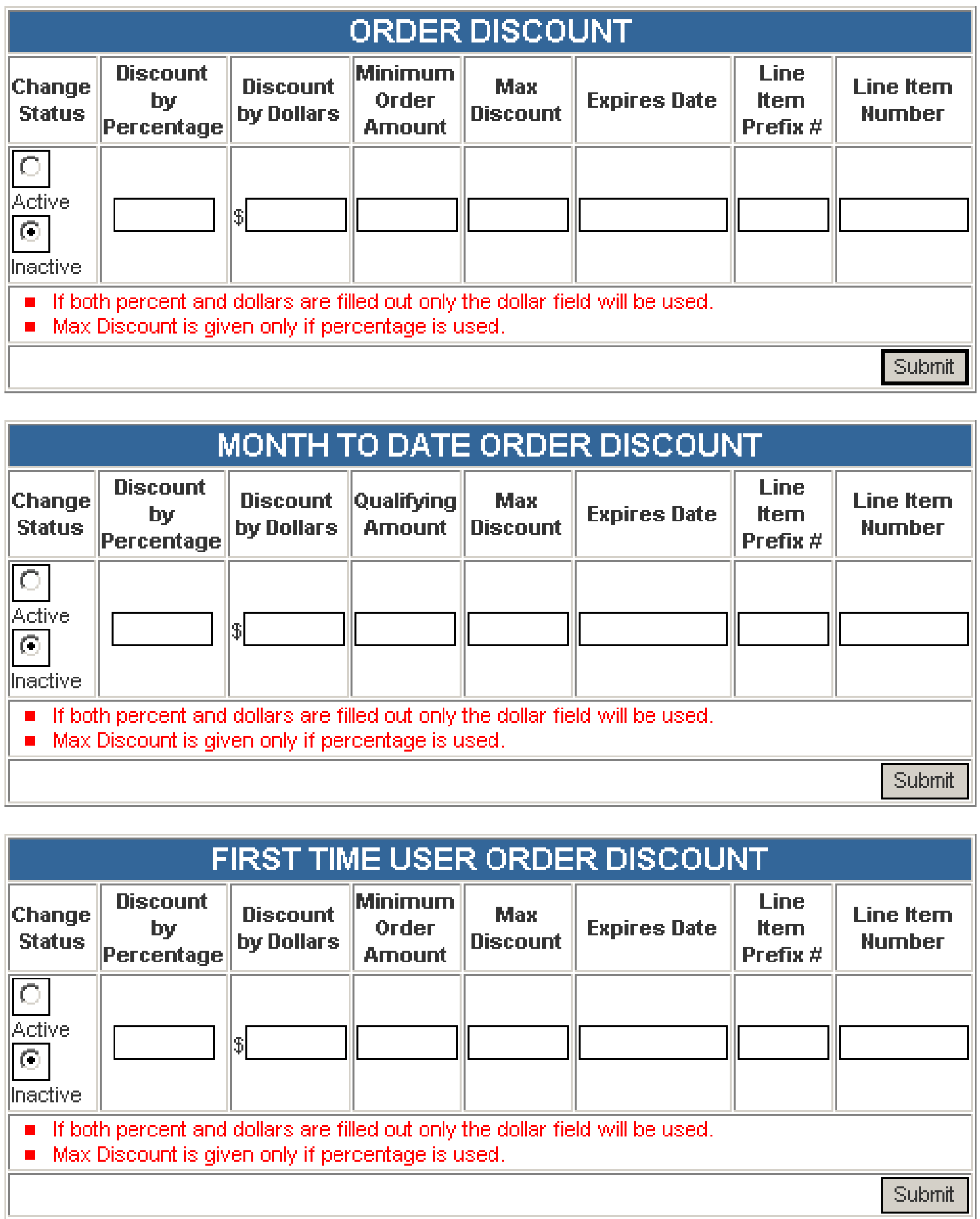


Figure 20-4: The Discounts Window

- **Minimum Order Amount:** To require that an order meet a minimum amount to receive the discount, enter that minimum order amount. For example, the discount to apply only after a customer orders at least $20 worth of products, enter 20 in this box. If there is no minimum order amount, enter Ø.
- **Max Discount:** To limit the discount to a certain dollar amount discount, enter that amount in the box. For example, to limit the discount at a maximum of $10, enter 10 in the box. If there is no maximum discount amount, enter Ø.
- **Expires Date:** Set up a date that the discount expires. To do this, enter the month, day and year of expiration in this box. For example, if the discount expires August 15, 2002, enter 08/15/2002. If there is no expiration date, leave this box blank.
- **Line Item Prefix #:** In these boxes, enter the line item prefix number for this discount, MMM, for example. This prefix must exist in the DDMS system.
- **Line Item Number:** In these boxes, enter the line item number for this discount. This number must exist in the DDMS system.

3 When you finish adding the discounts, click Update.

Removing a Discount

To remove a discount.

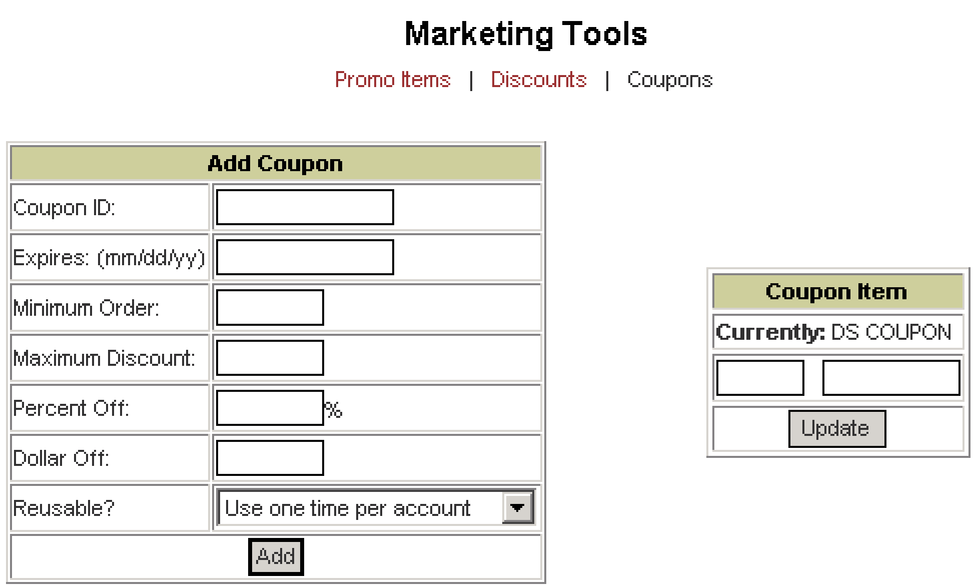


Figure 20-5: The Add Coupon and Coupon Item Dialog Boxes

1 Open the Marketing Tools - Discount window.

2 Click Remove.

3 The discount is removed and no longer applies to orders.

Updating a Discount

To update a discount.

1 Open the Marketing Tools - Discount window.

2 Enter any new information in the boxes.

3 When you finish, click Update.

4 The discount is updated.

Coupons

You can also set up coupons for your customers to use for certain orders. Coupons can be sent to individual customers, unlike discounts which apply to all customers. The coupons can be used as a one-time discount or as a standing discount every time it's used.

1 From the Marketing Tools page, click the Coupons link. See Figure 20-1.

2 The Coupons page opens. See Figure 20-5.

3 In the Add Coupon box, complete the following boxes:

- **Coupon ID**: Enter a unique ID for this coupon. This identification separates these coupons from others you set up.
- **Expires**: Enter the date this coupon expires. If the coupon expires December 1, 2002, enter 12/01/2002.
- **Minimum Order**: To require customers meet a certain minimum amount for the discount to take effect, enter the minimum order amount in this box. For example, for the discount to apply only after a customer orders at least $20 worth of products, enter 20 in this box. If there is no minimum order amount, enter Ø (zero).
- **Maximum Discount**: To limit the discount after a certain dollar amount has been applied, enter that amount in the box. For example, to limit the discount to $100, enter 100 in the box. If there is no maximum amount, enter Ø (zero).
- **Percent Off**: To apply the discount using a percent rather than a dollar amount, enter the percentage in this box. For example, to apply a 20% discount to each order, enter .2 in this box.

- **Dollar Off**: To apply the coupon using a dollar amount, rather than a percentage, enter the amount in this box. For example, to take $5 off this item, enter 5 in this box.
- **Reusable:** You can choose how many times a coupon can be used. From the drop down list, select:
  - Use one time per account
  - Use one time per user
  - Unlimited use until expiration.

4 Once you finish, click Add. The coupon is added to a list in the Current Coupons section.

Adding a Coupon Item

To put a coupon on an order, you must use an item. Use the following instructions for adding a coupon item.

1 In the Marketing Tools - Coupons window, click the first box in the Coupon Item dialog boxes. See Figure 20-5. Enter the company code.

2 Click the second box and enter the item number. This number must exist in the DDMS system.

3 Click Update.

Inactivating/Reactivating Coupons

Once you have set up a coupon, it displays in the current coupons section. You can inactivate and reactivate the coupons at will.

1 From the Marketing Tools - Coupons window, select the coupon to inactivate from the Current Coupons list. See Figure 20-6.

2 Click the Inactive button that corresponds to the coupon you selected.

3 The coupon moves to the Inactive Coupons section.

4 To reactivate the item, click the Reactive button in the Inactive Coupons

Figure 20-6: The Current Coupons List

Current Coupons								
Created On:	Coupon ID:	Expires:	Min Order:	Max Discount:	Percent Off:	Dollar Off:	Reusable?	
2/26/2003	12345	12/30/2004	$20.00	$2.00	0%	$20.00	yes	Inactivate
2/26/2003	4444	1/1/2004	$100.00	$0.00	2%	$0.00	yes	Inactivate
5/12/2003	67890	4/18/2005	$200.00	$0.00	0%	$78.00	no	Inactivate

section corresponding to the coupon selected.

5 The coupon moves to the Current Coupons list.

Deleting a Coupon

To delete a coupon:

1 Open the Marketing Tools - Coupon window.

2 In the Inactive Coupons box, click the Delete button corresponding to the coupon to delete.

3 The coupon is removed and no longer applies to orders.

Checking Coupon Usage

Once you set up a coupon and allow your customers to redeem it, you can check to see how often the coupon is used. To check coupon usage:

1 Open the Marketing Tools - Coupons window.

2 In the Current Coupons box, click the Coupon ID hyperlink for the coupon to view.

3 A Coupon Usage window opens displaying the usage information for the coupon you selected. See Figure 20-7.

4 When you finish, click Close Window.

Coupon Usage for Coupon mine

Account	User Name	Total Discount	Used On:
60000	vin, cal	2.56	6/18/2003 5:54:19 PM
DEMO	user, demo	30	6/18/2003 5:56:53 PM

Close Window

Figure 20-7: The Coupon Usage Window

Chapter 21: Contact Page

Contents

Using the Contact Page

Use the Contact Page to tell the user how to contact you. You can set up different email addresses for specific types of correspondence. For example, you can have suggestions sent to the email address bsmith@abc.com. You can have complaints sent to jdoe@abc.com. The feature lets you monitor different types of messages.

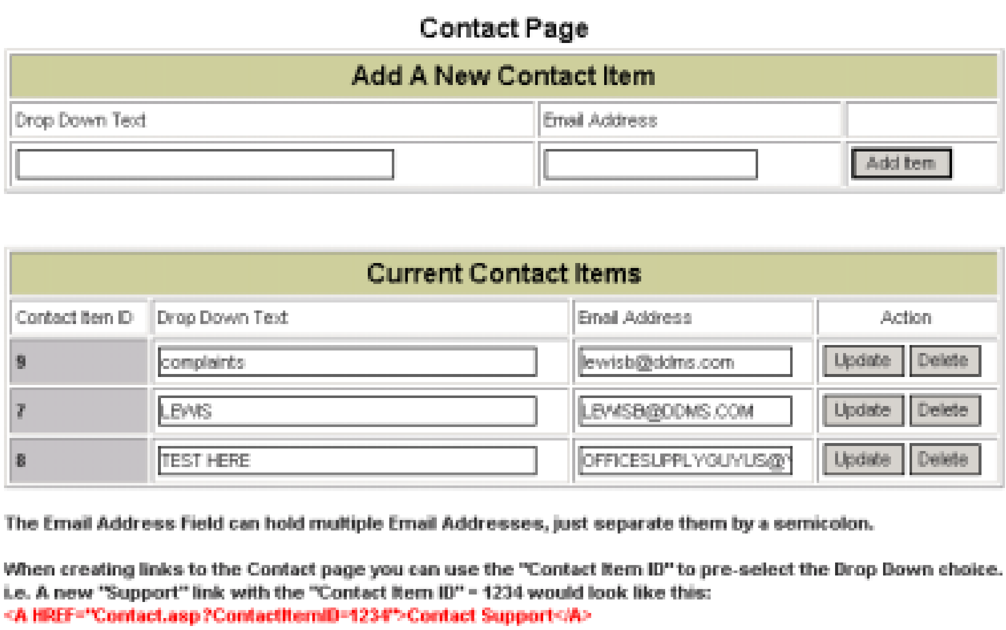
Adding a Contact Item

1 Log into the Dealer Station Administrative Control Panel. If you need instructions, see **Chapter 1: Logging In and Out of Dealer Station.**

2 After the Dealer Station Control Panel opens, click Contact Page.

The Contact Page window opens, as shown in Figure 21-1.

Figure 21-1: The Contact Page



3. In the Drop Down Text box, enter the type of message to set up. The text you enter here appears in the drop down list box for the user to choose from on the Contact Us page.
4. In the Email Address box, enter the email address that corresponds to the type of message you entered in the Drop Down Text box.
5. When you finish, click Add Item.
6. The new contact item appears in the Current Contact Items list.

Changing a Contact Item

To change an item in the Current Contact Items box:

1. Click the cursor in the box to change.
2. Highlight the information and add the new information.
3. When you finish, click Update. The site is updated immediately.

Deleting a Contact Item

To delete an item in the Current Contact Items box:

1. Choose the contact item to delete.
2. Click Delete next to the item.

Note: The Update and Delete buttons on each line apply only to that line. Use the buttons that appear on the line to delete. You can only add, change, and delete one contact item at a time.

Chapter 22: Setting Up Return Requests

Contents

About Return Requests

Your users can send a return request to you directly from the end-user web site. There are several parameters that determine if a customer can receive a credit, a full item return or whether they have access to this feature.

You can also customize the text the user sees when sending a request.

Setting Parameters

You set up parameters in:

- (LGG) Credit Return Disposition Screen in the DDMS system
- Dealer Station.

Note: You must be using DDMS version 6.1.57 or greater to use this feature.

Setting Up the (LGG) Credit Return Disposition Screen

This screen lets you determine reasons for a return and assign a status to an order total range. These return options appear on the end-user web site and your customers select one of these reasons from a drop-down list when they submit a request. These reasons can be used to create flags for a credit return order. See Figure 21-1.

Disposition By Reason

This field lists 14 reasons your customers can select from when they request a return. Next to each reason, enter either O, R, T, or V. These represent the places the item can be returned to for each return reason. Type **O** to return the item to on-hand. Type **R** for Receipts. Type **T** to trash the item. Type **V** to flag the return to the vendor.

O/E Status by Credit Value

Use these fields to set up default order total ranges for credit returns. There are four status field to set up; B, 8, 6, and 4. Status B is preset and applies to returns under $5. Status B returns are invoiced and assigned a disposition T (trash).

Statuses 8, 6 and 4 are defaults. You can determine their range. For example, you can set Status 8 as all orders between $5 and $30. Status 6 could be all orders between $30 and $99. Status 4 could be all orders between $99 and $99,999.99.

Setting Up Parameters in Dealer Station

There are three places in Dealer Station where you need to set up this feature for your customers. You set parameters in:

- Site Preferences
- Default User Settings
- User Accounts

Site Preferences: Customer Service Return Module.

You must set up this parameter for the feature to work. This enables or disables return requests for the entire site. For more information, see **Chapter 5: Site Preferences**.

Default User Settings: Customer Service Return Module

Set this parameter to enable or disable return requests for all your users. You must have the parameter in Site Preferences set for this work. For more information, see **Chapter 9: Default User Settings**.

User Accounts: Return Module

Set this parameter for a specific user. You must have the parameter in Site Preferences set for this work. For more information, see **Chapter 10: User Accounts**.

Figure 21-1: The (LGG) Screen

```
08:28:50          (LGG) CREDIT RETURN DISPOSITION PARAMETERS          08/14/03
================================================================================
             ACTION [I] (C=Change, I=Inquiry)              G/L Location [ 1]
================================================================================
 Disposition by Reason             OE Status by Credit Value
 Return Reason (O,R,T,V)        Status   FROM       TO
 CUSTOMER RETURN  [O]              B    [       ]  [   TE D] (Trash all Lines)
 WRONG ITEM       [ ]                 8         ___]       ___]
 DOESN'T WORK     [ ]                 6         ___]       ___]
 POOR QUALITY     [ ]                 4         ___]       ___]
 DAMAGED          [ ]
 SHORTSHIPPED     [ ]
 PRICING/BILLING  [ ]
 ENTRY ERROR      [ ]
 WRONG COLOR      [ ]
 SALESREP ERROR   [ ]
 VENDOR ERROR     [ ]
 BAD SUBSTITUTE   [ ]
 DUPLICATE ORDER  [ ]
 REFUSED          [ ]
                  [ ]
```

Customizing Text

You can customize the message text that the user receives when sending a request. You can also customize the button to access this feature.

1 Click Site Text.

2 In the Link Text box, you can customize the name of the button that appears in the end-user web page. In the Returns text box, enter the text to appear on the button.

3 Scroll down to the Miscellaneous Text box. You can customize the text for the message the users receive for non-returned items and returned items. Click in the Return Page for Non-Returned Items and Return Page for Returning Items text boxes and enter the new message text. See Figure 21-2.

4 When you finish, click Update.

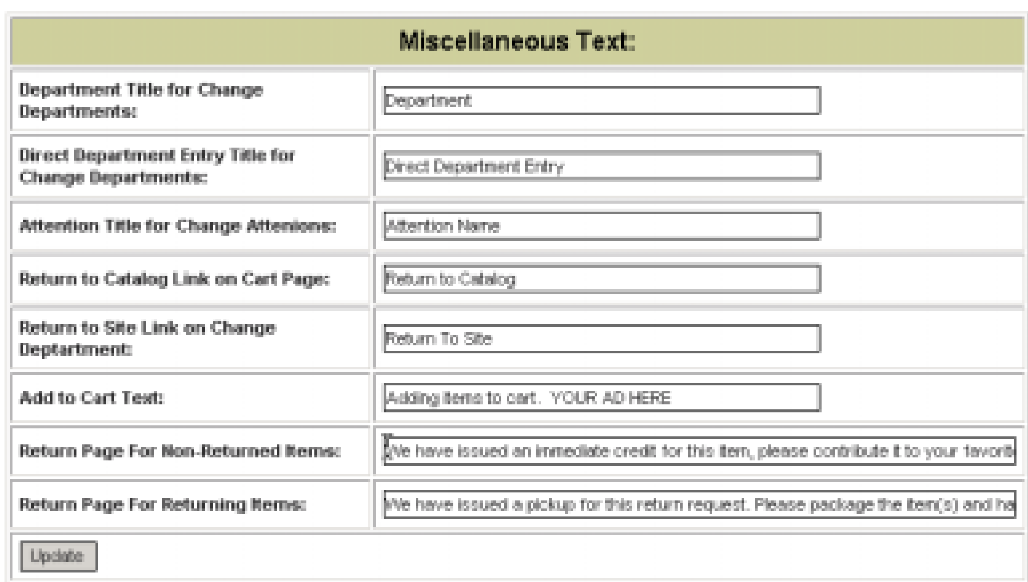


Figure 21-2: The Miscellaneous Text Box