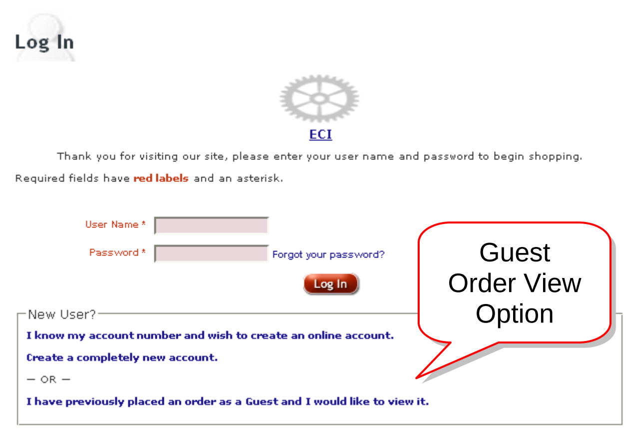
Guest User Checkout With Credit Cards (Without Having To Register)

A few casual visitors to your site are hesitant to commit to establishing an account with you, for one reason or another. In ECinteractive and is.D-Force 9.0.0 and higher, visitors can simply provide their email address and a credit card to complete Guest Checkout, *as long as you have enabled your guest account to use credit cards*.

Guest Checkout differs slightly from the login-authenticated version of the Checkout page:

- It requires an email address for subsequent order verification.
- Guest Checkout will only allow credit cards as the method of payment.
- Guest checkout requires an email address and CAPTCHA response to verify the visitor is human (not a spambot) for security purposes.
- As you might expect, Guest Checkout also prompts for shipping and billing addresses, and provides space to specify attention, short purchase order (P/O) number, and long P/O.

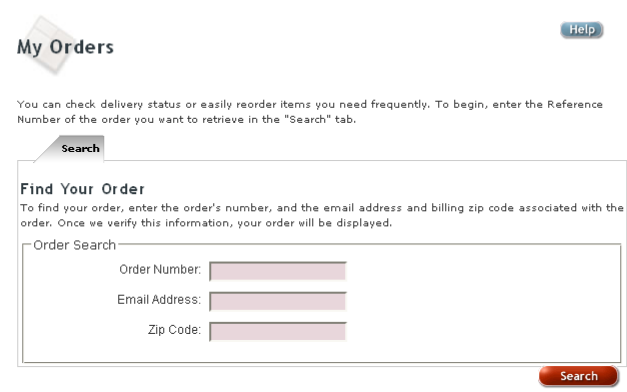
Guest Users may view their orders online — without being able to view other guests' order information.



Order History prompts guests for their email address, order number, and bill-to zip code so that these fields can be verified against the backend system.

The order record will display the same information as the Guest Checkout confirmation page.

The guest can print, select items to view, or add to the cart, depending on the order status.

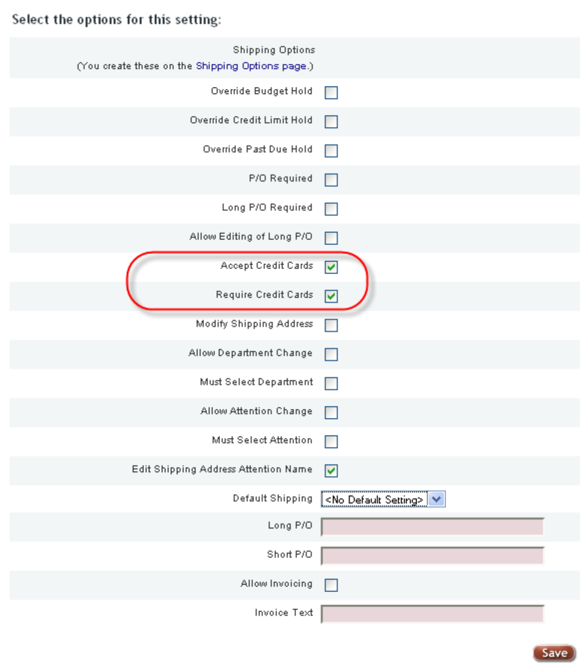


Guest User Setup

To let your guest customers checkout without creating an account, it is critical to allow or require credit cards during checkout.

You may need to adjust the Checkout Settings group that you have assigned to your Guest User account. In the Customer Management page, you have the ability to customize functions that guest customers can access. You can specify checkout, marketing, feature, price, and communication settings groups, just as you do for regular customers. This ensures that guest users only have access to the features you allow.

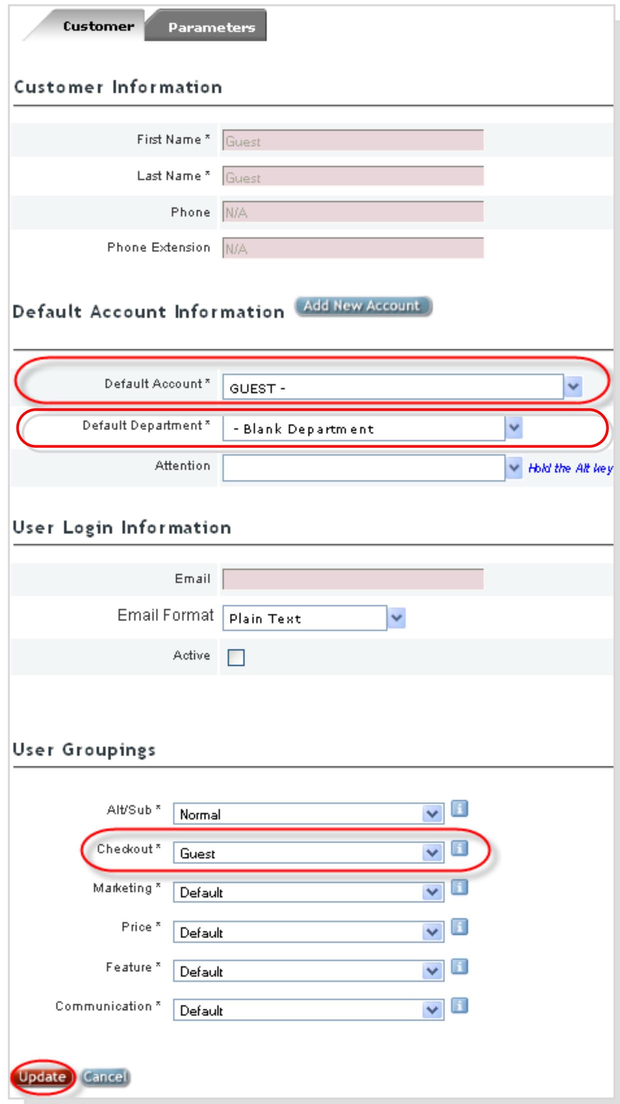
1. On the left-hand menu, click **Customer Admin** and select **Customer Management**.
2. Click **Edit Guest Customer**. The **Managing Customers Edit** page opens.
3. In the **Customer** tab in the **User Grouping** section, *note the name* of the **Checkout** settings group.
4. On the left-hand navigation bar, click **Customer Settings** and select **Checkout**.
5. The **Select Setting** drop down box defaults to display the **New Checkout Setting** option.
    - To *rename or edit* an existing setting, such as the one already assigned to your Guest User, click the down arrow in the **Select Settings** box and select the setting to change. Then click the **Setting Name** box and enter the new name over the existing name.
    - To *instead add a new setting specific to guests*, leave the **Select Settings** box to the **New Checkout Setting** option. Click the **Setting Name** box and enter a name for the new setting, such as "**Guest**".
6. Fill one *or both* of the following checkboxes:



    - **Accept Credit Cards.** Check this box to specify whether you accept credit cards from end users. To allow guest users to checkout as well as shop on your site, you must allow credit card usage.
    - **Require Credit Cards**. Indicate whether customers must use a credit card when placing orders. To require the user to enter a credit card number to complete the order, check this box. This limits the user to placing credit card orders only. *If you wish to allow the user to charge an order to an account they have established with you on your back-end system, leave this box blank.*

Note: **You must check one of these options.** If both boxes are unchecked for your Guest User's Checkout settings group, you are denying the ability to use credit cards. As a result, Checkout will not be available to your Guest Users. Instead, guests will be required to create an account online prior to placing an order.

7. Click **Update** to save an existing setting or click **Save** to save a new setting.
8. On the left-hand menu, click **Customer Admin** and select **Customer Management**.



9. Click **Edit Guest Customer**. The **Managing Customers Edit** page opens.
10. In the **Customer** tab in the **User Grouping** section, note the name of the **Checkout** settings group.
11. Click the **Edit** button to make appropriate changes to the Customer and Parameters tab.
12. **(Mandatory)** Select the **Default Account**, usually **GUEST**.
13. **(Mandatory)** Select **Default Department**, usually **- Blank Department**.

    The Default Account and Department are critical to communications between your shopping site and your back-end system. They affect whether your guests can view product details and complete an order. If both fields are not set, your guests will encounter errors when viewing your Product Detail pages.

    Standard practice is to have a GUEST account in your back-end system, set up to accept credit card orders from your unregistered Web site visitors. For instructions on setting up this back-end account, please see your system's documentation. In the Account field of the Edit Guest Customer page, select this GUEST account from the drop-down list.

Note: If you are a DDMS system dealer, you should not use your DEMO account for guest orders. By design in the DDMS back-end system, DEMO orders do not flow through to Order Entry. DDMS' DEMO account is meant to demonstrate your system to prospective clients without having to manually remove tickets or incur transaction fees.

In addition to the Account field, the Department field is also mandatory for Guest users in ECinteractive and is.D-force. In the Department field of the Edit Guest Customer page, you should select - Blank Department, unless your back-end GUEST account record has a more specific department to select.

14. Select the **Checkout** settings group you edited or created to allow or require credit cards.

15. Select other **User Grouping** settings appropriate for your guest shoppers. The user grouping settings you select are used as a template for all the guest shoppers who create an account online.
16. Select any Global and custom catalogs or pricing contracts and Location IDs set on the on the Parameters tab, as appropriate for a guest user account.

Note: The User Login fields and Authorize Account button *do not apply to Guest Users*. These fields are for established accounts where you wish individual shoppers to shop for multiple departments.

17. When you finish, click **Update**.

Note: If you make changes to catalog settings to any user including the guest, the system will trigger a Catalog Combination Index (CCI) overnight.

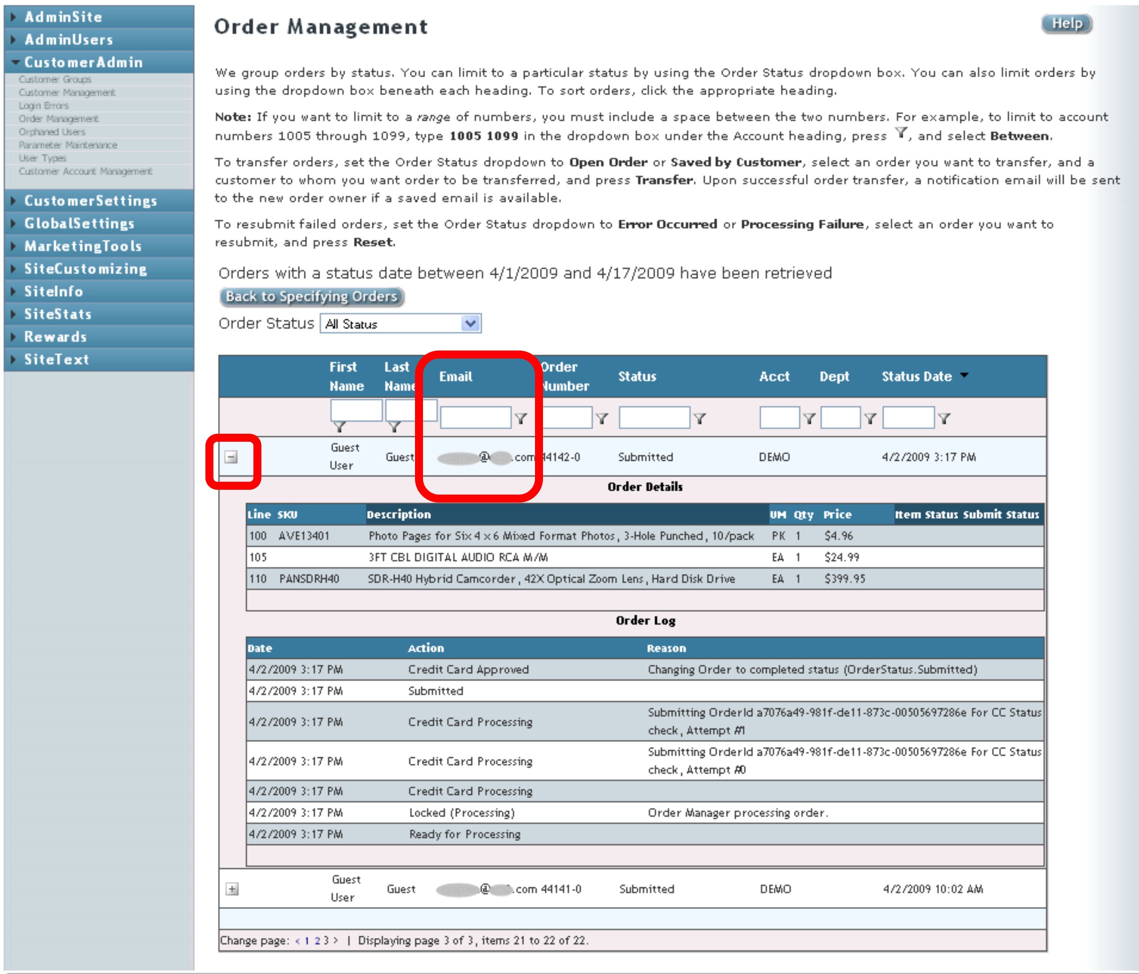
18. After making changes to your Guest User, we recommend testing the guest shopper checkout option on the shopper's page before allowing guest shopper access.

Note: When shoppers click the **Register Me** option on their Home page, the system automatically assigns the shopper the global and custom catalogs you set up for the guest user account.

Order Management

Dealers may look up guest order detail on the **Order Management** page of the Admin Control Panel.

This page shows a sortable, filterable column of email addresses to indicate who ordered through Guest Checkout.



1. From the left-hand navigation menu, click **Customer Admin** and select **Order Management**. (Or, from the top training navigation menu, click **Site Info** and **Order Management**.) The Order Management page opens.
2. You can use this initial page to limit the orders by date range, order number or account number. If you decide not to set limits, click **Retrieve Orders** and go to **Step 5**.
   - To limit by date range, click the first **Status Range Date** box and enter the beginning date in the range. Click the corresponding box and enter the ending date in the range. If you cannot recall the date, click to open the calendar and select the date. This is the date the status changed for the order.
   - To limit by order number, click the **Order Number** option. Enter part or all of the order number by which to search in the corresponding box.
   - To limit by customer account number, click the **Account** option. Click the down arrow in the Account box and select the account by which to search.

3. Click **Retrieve Orders**. The page refreshes and the orders display according to the limits you specified.
4. After the page refreshes, you can further limit the orders to view. After each limit you set, the page refreshes to display the new records.
   - To limit by order status, click the down arrow in the **Order Status** box and select the type of orders on which to report.
   - To limit using the **First Name** through **Status Date** boxes, click each box and enter the limit by which to search. Then, click and select the filter. You could filter to include only specific departments starting with the number 1, for example. In addition, the Email column shows the email address of users who checked out without signing in by using the Guest User Checkout page. This column can be sorted and filtered to let you view orders placed under the Guest Account.

Note: If you limit to a range of numbers, you must include a space between the two numbers. For example, to limit to account numbers 1005 through 1099, you would type 1005 1099 in the Acct box. Then, click and select Between. For more details on setting filters, see the Admin Control Panel online help topic, *Filtering Information*.

5. To view order detail, click the to the left of the order to view. The system displays the line items on the order, along with the statuses the order has been through.
6. This page also lets you delete and transfer orders. Only orders displaying a status of **Shopping Cart** or **Saved Orders** can be deleted or transferred.
   - To delete a displayed order, click . At the Are You Sure prompt, click OK. The order is removed from the list and it no longer appears on the shopper's Web page.
   - To transfer a displayed order, click . When the shopper list opens, click the checkbox beside the shopper to select. Click . At the Are You Sure prompt, click OK. The order now appears as a Saved Order and is assigned to the shopper you specified regardless of the order's previous status. An email is sent to the new shopper containing the order's status, previous order user, and link to the order's site.