



File #110

Platform: ALL

Setting Up Guest Users for Dealer Station

What It Does

A guest user login lets customers who do not have an account purchase from you through Dealer Station DDMS Edition.

Using the guest user login affects every customer who comes to your site:

- Without the guest user login, the login screen is the first screen a user sees. Users must log in to gain access to the rest of your site.
- With guest user login, your site automatically logs each user as a guest, and takes them to the main page. However, customers who have accounts need to log in by clicking the Member Sign On button.

Customers who use the guest log in can place orders, and enter shipping addresses. Their only payment option is a credit card.

The user name that a customer is currently using appears at the top of each page. If you set up guest user login, you'll need to explain to your customers that they need to login, or they'll be using the guest user account.

How to Do It

Setting up guest user login requires two basic steps:

- Create a guest account in the (A) screen or Customer window.
- Set parameters for the guest user on your Dealer Station site.

Creating a Guest Account

We'll explain how to set up this account using either the text-based screens or the graphical eNsite Pro screens.

If you use text-based screens, follow these steps:

- 1 Go to the (A) screen, and select the [A] Add action code.
- 2 In the NAME field, type **GUEST USER**, and press TAB.

Note: If you see the prompt You Must Assign a Number, enter a unique account number, like GUEST.

- 3 Tab to the STATUS O/E field, and specify a status code that prevents the customer from charging.

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(Status codes from 1-9 and from A-F prevent charging.)

- 4 Press RETURN to save your record.
- 5 Press ESC to go back to the action code field, and select the [I] Inq action code.
- 6 At Name, type **GUEST USER** and press RETURN.


When the customer record appears, note the account number; you'll need it later. Go to **Setting Parameters for the Guest User**.

If you use the graphical eNsite Pro screens, follow these steps to create a guest user account:


- 1 In the eNsite Pro Master Menu, double-click the



button.

- 2 In the Customer Window, click  to create a new customer record.
- 3 In the Name box, type **GUEST USER**.

Note: If your system is not set to generate account numbers, the cursor appears in the Account box first. Specify a unique account number you can remember, like GUEST.

- 4 In the Status box, specify a status code that prevents the customer from charging. (Status codes from 1-9 and from A-F prevent charging.)
- 5 Save the new record by clicking the  button.

After you save the record, the account number assigned to this record will appear. Note this number; you'll need it later.

Setting Parameters for the Guest User

After creating a guest user customer record, you need to set parameters for this account within Dealer Station DDMS Edition. Follow these steps:

- 1 Go to the admin pages for your Dealer Station DDMS Edition website.
Specify your user name and password when prompted.
- 2 Click the **User Accounts** button on the left side of the screen.
- 3 When the Search for Users box appears, click the **Guest User** button, which is in the lower right corner of this box.
- 4 In the New User window, set parameters for guest users.

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Note: A number of these options appear grayed out, because they do not apply to guest users.

Options which must always be set in a particular way for guest users have been preset for you.

Each parameter that you can set for guest users is described below:

Dealer Station - New User

- **Status:** Set to **Active** once you're ready to begin using the guest user. See the figure at right, which shows the fields under the first two headings that apply to guest users.
- **First Name:** Type **GUEST** or something similar. The system uses this name to identify guest users when they create tickets.
- **Last Name:** Type **USER**. The system uses this name together with the First Name field to identify guest users' tickets.
- **User Name:** Type **GUEST** or something similar; the system uses this internally.
- **Password:** Type **GUEST** again.

Department Settings

- **Account number:** Specify the account number for the guest user account you set up earlier.

The screenshot shows two forms. The first form, titled "DealerStation - New User", has the following fields: Status (radio buttons for Active and Inactive), First Name (text box with "GUEST"), Last Name (text box with "USER"), User Email Address (text box with "rbp@valuelp.com"), Username (text box with "guest"), and Password (text box with "guest"). The second form, titled "Department Settings", has the following fields: Account Number (text box with "10009"), Use GL Location (text box), Use Inventory Location (text box), Create Department List (button labeled "Department Lists"), Default Department Name (dropdown menu with "None"), and a Code field (text box). An "Update" button is located at the bottom right of the Department Settings form.

- **Use GL Location:** This field gives you the option of specifying a G/L location for guest users. If you leave it blank, the system uses the location specified for Dealer Station DDMS Edition.
- **Use Inventory Location:** Use this field to specify a particular inventory location for guest users. If you want to use the default inventory location for guest users, leave this field blank.

The rest of the fields under the Department Settings heading do not apply to guest users.

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Click the **Update** button to make sure you have the account number right.

Note: The fields under the next three headings (Attention Settings, Email Confirmation, and Approval Settings) do not apply to guest users.

User Settings

- **Order From Catalog:** DDMS recommends that you set this parameter to **YES**. Doing so lets guest users order from your online item catalog.
- **Order From Contract (Laundry List):** Select the appropriate response:
 - Yes** Use a laundry list for guest users. If you specify **Yes**, you need to set up a laundry list for guest users. For instructions, see FAQ File #90: Setting Up Laundry Lists for Dealer Station.
 - No** Do not use a laundry list for guest users.
- **Laundry List:** If you specified Yes at Order From Contract (Laundry List), specify the name of the guest users' laundry list here.
- **Default Printer:** This field gives you the option of specifying a default printer for guest users. If you leave this field blank, the system uses the printer specified for Dealer Station in the (L1) screen.

Override Credit Limit Hold:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Override Past Due Hold:	<input checked="" type="radio"/> Yes <input type="radio"/> No
View Held Orders:	<input checked="" type="radio"/> View orders on <input type="radio"/> View all orders <input type="radio"/> View all orders
Order From Catalog:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Order From Contract (Laundry List):	<input checked="" type="radio"/> Yes <input type="radio"/> No
Laundry List:	DEMO
Default Printer:	

- **PO Required:** Select the appropriate response:
 - Yes** Force guest users to specify a P/O number.
 - No** Do not force guest users to specify a P/O number.
- **View List Prices:** Select the appropriate response:
 - Yes** Display list prices when showing items.
 - No** Do not display list prices when showing items.

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- **View Customer Prices:** Select the appropriate response:

Yes Display the prices that guest users will pay.

No Do not display the prices that guest users will pay.

- **Identify Contract Items:** Select the appropriate response:

Yes Display the words “contract price” in blue under the price of each contract item. (This works for guest users only if you assign contracts to the guest user account.)

No Do not identify contract prices.

- **Identify Promo Items:** Select the appropriate response:

Yes Display the words “promo price” in green under the price of each item that’s on a sales flyer. (This feature does not work if you set the Best Pricing field to **X** for the guest user account.)

No Do not identify sales flyer prices.

- **View Quantity On Hand:** Select the appropriate response:

Yes Display the on-hand quantity for each item.

No Do not display the on-hand quantity for each item.

Order History:	<input checked="" type="radio"/> Yes <input type="radio"/> No
PO Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No
View List Prices:	<input checked="" type="radio"/> Yes <input type="radio"/> No
View Customer Prices:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Identify Contract Items:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Identify Promo Items:	<input checked="" type="radio"/> Yes <input type="radio"/> No
View Quantity On Hand:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Accept Credit Cards:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Credit Card Required:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Modify Shipping Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No

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- **Show Extended 3 digit Price:** Select the appropriate response:
 - Yes** Display prices with three digits after the decimal.
 - No** Display prices with two digits after the decimal.

Modify Shipping Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Extended 3 digit Price:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Reference Item Action:	<input type="radio"/> Normal <input checked="" type="radio"/> Automatic
Discontinued Item Action:	<input type="radio"/> Normal <input checked="" type="radio"/> Automatic
Substitute Item Action:	<input checked="" type="radio"/> Normal <input type="radio"/> Automatic
Reference OH = 0 Item Action:	<input checked="" type="radio"/> Normal <input type="radio"/> Automatic
Generic Sub Item Action:	<input checked="" type="radio"/> Normal <input type="radio"/> Automatic
Preferred Sub Item Action:	<input checked="" type="radio"/> Normal <input type="radio"/> Automatic
Alternates:	<input checked="" type="radio"/> Allowed <input type="radio"/> Not Allowed
Choose Shipping Option:	Current Site Shipping ▾
<input type="button" value="Save"/>	

- **Reference Item Action:** Select the appropriate response:
 - Normal** When a guest user selects a reference item, prompt the user to either select the item referenced or cancel.
 - Automatic** When a guest user selects a referenced item, automatically place the item referenced in the cart instead.
- **Discontinued Item Action:** Select the appropriate response:
 - Normal** When a guest user selects a discontinued item, prompt the user to either select the substitute or cancel.
 - Automatic** When a guest user selects a discontinued item, automatically place the substitute item in the cart instead.
- **Substitute Item Action:** Select the appropriate response:
 - Normal** When a guest user selects an item that has a substitute, prompt the user to either select the substitute, select the original item, or cancel.
 - Automatic** When a guest user selects an item that has a substitute, automatically select the substitute.

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- **Reference OH=Ø Item Action:** Select the appropriate response:

Normal When a guest user selects an item with no on-hand quantities, and there is a reference if no on-hand alternate, prompt the user to either select the alternate or cancel the item.

Automatic When a guest user selects an item with no on-hand quantities, and there is a reference if no on-hand alternate, automatically select the alternate.

- **Generic Sub Item Action:** Select the appropriate response:

Normal When a guest user selects a generic substitute item, prompt the user to either keep the original item, select the substitute, or cancel.

Automatic When a guest user selects a generic substitute item, automatically place the substitute item in the cart instead.

- **Preferred Sub Item Action:** Select the appropriate response:

Normal When a guest user selects a preferred substitute item, prompt the user to either keep the original item, select the substitute, or cancel.

Automatic When a guest user selects a preferred substitute item, automatically place the substitute item in the cart instead.

- **Alternates:** Select the appropriate response:

Allowed Let alternates work for guest users. This enables the six parameters listed above.

Not Allowed Alternates do not work for guest users. The system ignores the previous six parameters, and does not check for alternates.

- **Choose Shipping Option:** Select the shipping option you want for guest users. (Shipping options are set in the Shipping Management page: for details, see *Setting Up Dealer Station DDMS Edition Admin Pages*.)

- 5 To record your changes, click **Save**. This completes the procedure.