

eSales

User Guide

Copyright

© 2003 NxTrend Technology, Inc.™

5555 Tech Center Drive, Suite 300

Colorado Springs CO 80919

USA

All Rights Reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. This software may be used or copied only in accordance with the terms of those agreements. This document may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable form without the written permission of NxTrend Technology, Inc.

Trademarks

Microsoft and Windows are registered trademarks of Microsoft Corporation.

eSales Center is a trademark of NxTrend Technology, Inc.

Table of Contents

Table of Contents	4
Chapter 1: Getting Started	6
Accessing eSales Center.....	7
Requesting an eSales Center Login	8
Logging in to eSales Center	8
Logging Out.....	9
Current Session.....	9
Chapter 2: The Products Tab	12
Products Tab Introduction.....	13
Types of Searches	14
Keywords.....	14
Categories	15
Vendors.....	15
Order History.....	16
Search Results Window	17
Optional Products.....	18
Substitute products	18
Supersede Products	18
Warehouse products.....	18
Products Tab Tasks.....	19
Performing Keyword Searches	19
Performing Product Category Searches.....	19
Performing Vendor Searches.....	21
Performing Order History Searches	22
Chapter 3: Orders Tab and Shopping Cart	25
Orders Tab Introduction	26
Shopping Cart.....	27
Items.....	28
Shipping.....	28
Notes	29
Check Out.....	29
Switch Carts	30
Clear Cart	30
Copy Items to the Current Shopping Cart.....	30
Order Inquiry	30
Back Order	30
Orders Tab Tasks.....	31
Entering an Order.....	31
Switching Carts.....	33
Creating a New Shopping Cart	34
Copying Items to the Current Shopping Cart.....	34
Clearing a Cart.....	35

Placing a Quote	35
Adding/Deleting Notes.....	36
Adding/Deleting Comments.....	37
Inquiring on an Order.....	37
Inquiring on a Back Order.....	38

Chapter 1: Getting Started

- Accessing eSales Center

Accessing eSales Center

Accessing eSales Center requires a company number, operator initials, and an operator password. The administrator sets up operators using the information provided by you through an email. While waiting for your login information, you can gain access to product information by entering wiiq in the Login Name and Password fields.

The following tasks are detailed in this section:

- ◆ Requesting an eSales Center Login
- ◆ Logging In to eSales Center
- ◆ Logging Out
- ◆ Current Session

Requesting an eSales Center Login

Follow these steps to request a login and password:

- 1 Access eSales Center. The following window displays:

here.' and a note: 'If you do not have an account, you can log in to perform Product Inquiries by entering *wiiq* in both the Login Name and Password fields, above.'"/>

- 2 Click the **here** link to apply for a login and password.
- 3 Enter your name, company name, office telephone number, fax number, and your e-mail address. Name, Company and Phone Number are required.
- 4 Click Go to send an e-mail notification to the administrator. The administrator will send your login name and password, and you will be able to use eSales Center immediately.

Logging in to eSales Center

Follow the steps below to log in to eSales Center.


- 1 Access eSales Center.
- 2 Enter your login name and password. If you have multiple companies, the following window displays. If you do not have

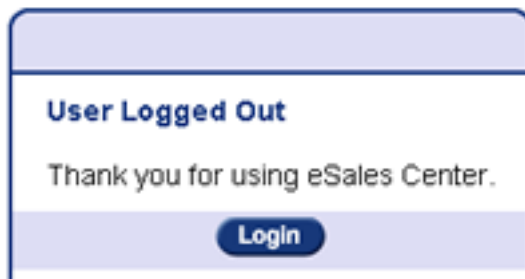
multiple companies, you will go directly to the welcome window as shown in step 4.



- 3 Select a company and click Login.
- 4 You now have access to the functions in eSales Center depending on your operator type and assigned security level.

Logging Out

Use the Logout button  to log out of the current session without closing your browser. You can return to the Login window to log in as a different operator by clicking the **Login** button.



Current Session

The Session Information window displays information about the active session, such as company number, operator, default ship to and warehouse. Each session

lasts until the browser is closed. This window not only displays the current session information, it also contains boxes so that you can change session default information. Any session information that is changed is only valid for the current session.

Displaying or changing current session information

- 1** Hover over the Profiles tab. The Profiles sub-menu opens.
- 2** Click Session.
- 3** You can select a default warehouse, a shipping address, or change the page size.

Note: The page size determines how many lines display on the eSales Center screen.

- 4** Click Update to save the information.

Chapter 2: The Products Tab

- Products Tab Introduction
- Types of Searches
- Search Results Window
- Products Tab Tasks

Products Tab Introduction

Select the Products tab to search for products based on keywords, categories, vendor or ordering history. The Keyword search window initially defaults; to search using another method, click the corresponding button on the left side of the window.

Each of the four types of searches, keyword, category, vendor, and history, allow you to use a basic and/or advanced search method.

The following tasks are defined in this section:

- ◆ Performing keyword searches
- ◆ Performing product category searches
- ◆ Performing vendor searches
- ◆ Performing product history searches

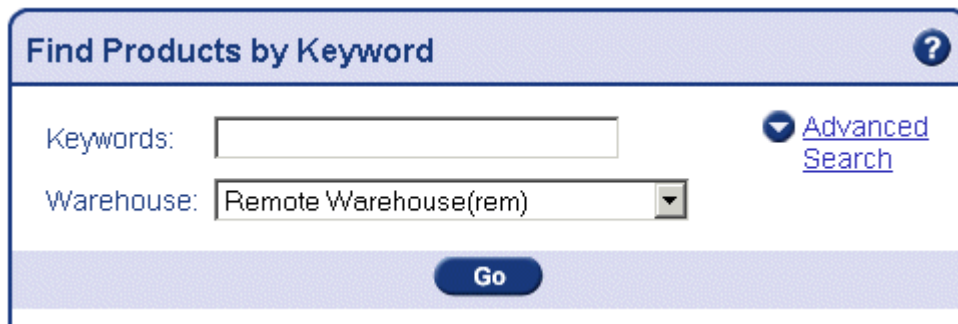
Types of Searches

A basic search window is used for all four types of searches and allows you to perform a search by the keyword, category, vendor, or order history and then narrow that search by warehouse. The Advanced search window is used with the Keyword type search and is used to enter additional information, such as an order number.

As with all search windows, the more information that is entered into the fields, the more specific the search results will be. So, enter less information for a broad search.

Keywords

Keywords help narrow product searches by returning a list of all products with the assigned keyword. Keywords typically contain the product's description, product number, lookup name, or category.



The screenshot shows a search window titled "Find Products by Keyword" with a help icon (question mark) in the top right corner. It contains two input fields: "Keywords:" with an empty text box, and "Warehouse:" with a dropdown menu showing "Remote Warehouse(rem)". To the right of the "Keywords:" field is a link labeled "Advanced Search" with a downward-pointing arrow icon. At the bottom center of the window is a blue "Go" button.

Click Advanced Search to define more criteria and narrow the search results. The Advanced search also shows cross-referenced products.

The screenshot shows a search window titled "Find Products by Keyword" with a help icon in the top right. It contains four input fields: "Keywords" (a text box), "Warehouse" (a dropdown menu with "East Warehouse(east)" selected), "Method" (a dropdown menu with "Keyword" selected), and "File" (a dropdown menu with "Stock Items" selected). A "Basic Search" link is located to the right of the "Keywords" field. A "Go" button is centered at the bottom of the window.

Enter the product number into the **Keywords** field then choose the warehouse. Next, select the type of search from the **Method** pull-down field.

Click Go when all the information is entered to begin the search. The Search Results window displays the products that fit the criteria entered.

Categories

A Product Category is a method for grouping products together for reporting and distribution. Examples of categories include abrasives, power tools, and wire.

The screenshot shows a search window titled "Find Products by Category" with a help icon in the top right. It contains two input fields: "Category" (a text box) and "Warehouse" (a dropdown menu with "East Warehouse (east)" selected). A "Go" button is centered at the bottom of the window.

Vendors

Vendors are the “companies” that you buy products from.

The screenshot shows a search window titled "Find Products by Vendor" with a help icon in the top right. It contains two input fields: "Vendor" (a text box) and "Warehouse" (a dropdown menu with "East Warehouse (east)" selected). A "Go" button is centered at the bottom of the window.

Order History

When you perform an order history search, the returned results list all of the products you have ordered within the criteria stated. This detailed list allows you to quickly find items you have purchased in the past for easier re-ordering.

Find Products by Order History ?

Previous Month(s) History:

Sort by:

Show Quantities:

Warehouse:

Go

Search Results Window

From this window, click the Product link to view detailed information about that product. If you have a current order in the Shopping Basket, you can add products to the order and check the product availability in different warehouses. This window additionally displays links to optional, supersede, and substitute products if they are available.

Product Listing			
Product	Add to Cart	Description	Available
2x4x10	<input type="text" value="0"/>	2x4 10 Foot	5 each
2x4x12	<input type="text" value="0"/>	2x4 12 Foot	4.5 each
2x4x14	<input type="text" value="0"/>	2x4 14 Foot	5 each S
2x4x16	<input type="text" value="0"/>	2x4 16 Foot	9 each
2x4x18	<input type="text" value="0"/>	2x4 18 Foot	5 each
2x4x20	<input type="text" value="0"/>	2x4 20 Foot	6 each
2x4x8	<input type="text" value="0"/>	2x4 8 foot	58 each
3	<input type="text" value="0"/>	Skil 3/8" Cordless Drill W/Case	0 each W Q P

[Clear Qtys](#) [Add to Cart](#)

[<< Back](#) [< Previous](#) [Next >](#)

Optional Products

Click the O link to view a list of optional products. Optional products are items that may be needed in addition to the product being sold. For example, electric receptacle boxes need three-way or four-way switches and a plumbing threaded shut-off valve requires a connector.

Substitute products

Click the S link to view a list of substitute products. Substitute products are temporary substitutes for existing products and are not 100 percent interchangeable. Substituting usually occurs when the vendor is temporarily out of the product for any number of reasons.

Supersede Products

Click the P link to view a list of supersede products. Like substitute products, superseded products are not 100 percent interchangeable; they supersede the existing products and are interchangeable in most situations. Superseding generally occurs when a product becomes obsolete or is not manufactured anymore and has been replaced with a better product.

The usage copied to the replacement product is in the stocking unit of the superseded product. If the stocking units of the products are different, the usage copied to the replacement product is inaccurate as no unit conversion is made.

Warehouse products

Click the W link to view product availability in other warehouses.

Products Tab Tasks

You can perform the following tasks on the Products Tab.

Performing Keyword Searches

Follow the steps below to perform a keyword search.

- 1 Hover over the Products tab to display the Product sub-menu.
- 2 To display the Find Products by Keyword window, click Keyword.
- 3 Enter a keyword. Your default warehouse displays, and depending on your security, you may not be able to change this field.
- 4 Click Go to view the search results. **Or,**
- 5 To perform a more detailed search, click **Advanced Search**.
- 6 Enter a Keyword or multiple keywords separated by a space. Your default warehouse displays. Your security dictates if you can change this field.
- 7 From the **Method** pull-down field, select Keyword, Product, or Description.
- 8 From the **File** pull-down field, select Stock Items, All Products, or Catalog (non-stock) Items.
- 9 Click Go to view the search results or click **Basic Search** to return to the previous window.

Performing Product Category Searches

Use the product category search to search for specific groups of products.

- 1 Hover over the Products tab to display the Product sub-menu.
- 2 Click Category to display the Find Products by Category

page.

- 3 Enter a product category description or leave the field blank for a broad search.
- 4 Select a warehouse or accept your default warehouse.
- 5 Click Go. The Product Categories window displays your search results.

Category	Description
0001	Wire
0002	Conduit
0003	Fittings
0077	Directs
0088	Non-Stock
0115	lumber
0293	non stocks
2	1

<< Back < Previous Next >

- 6 Click a Category link to display a listing of all products in that category. The resulting window displays the product availability, minimum ordering quantities, and product status.

- 4 Enter a warehouse or accept your default warehouse.
- 5 Click Go to view the search results.

Vendor Listing		
Vendor No.	Lookup Name	Full Name
111	C & E	C & E Manufacturing
323	Big Ed Photogra	Big Ed Photographics
1101		t
2626	Becky's Test Ve	Becky's Test Vendor
10000	Automotive Inte	Automotive International Refr.
12345		
100036	Alabama Constru	Alabama Construction Company
100037	Alabama Constru	Alabama Construction Products

<< Back < Previous Next >

- 6 Click a vendor number to display the Product Listing window.

Performing Order History Searches

Perform an order history search to display a list of the products on previous orders that you have bought within specified date ranges. This type of search is useful when you want to duplicate a previous order for your new order.

- 1 Hover over the Products tab to display the Products sub-menu.
- 2 Click History to display the Find Products by Order History page.
- 3 Select the number of months of product history to view.

The screenshot shows a web form titled "Find Products by Order History" with a help icon in the top right corner. The form contains four dropdown menus: "Previous Month(s) History" set to "12", "Sort by" set to "Product", "Show Quantities" set to "Yes", and "Warehouse" set to "Main Warehouse (main)". A blue "Go" button is located at the bottom center of the form.

- 4 Choose a **Sort By** option: Product or Quantity.
- 5 If you want to display product quantities, leave the default as Yes in the **Show Quantities** field. Otherwise, choose No.
- 6 Select a new warehouse or accept the default warehouse.
- 7 Click Go to view the search results.

Chapter 3: Orders Tab and Shopping Cart

- Orders Tab Introduction
- Shopping Cart
- Orders Tab Tasks

Orders Tab Introduction


This section describes tasks related to orders, such as placing orders and performing order inquiries. You can place orders or quotes in the Shopping Cart window, inquire on orders, and search through back orders.

The following tasks are described in this chapter:

- ◆ Entering an order
- ◆ Switching Carts
- ◆ Canceling an order
- ◆ Inquiring on a present/past order
- ◆ Inquiring on a back order
- ◆ Entering a quote
- ◆ Adding/Deleting notes
- ◆ Adding/Deleting comments
- ◆ Changing the number of entry lines displaying

Shopping Cart

Use the Shopping Cart to order or enter a quote. You can also change information, such as a purchase order number or request date, and view the order lines, ship to information, and order notes.

 **WARNING:** eSales Center will hold multiple open orders for different ship to locations and/or different warehouse locations. However, upon access of the shopping cart, you WILL NOT be notified that you have multiple orders. It is your responsibility to make sure you are displaying the correct order by clicking Switch Carts. Refer to the Switch Carts section in this chapter for more information.

Items

The Items section of the Shopping Cart allows you to review your order and add any products to the Shopping Cart.

Click the Items button [1 Items](#) from the Shopping Cart Index to add products to the order.



For additional information, such as vendor web links, product specifications and product pictures, the product description may be hyperlinked and is indicated by an underline.

To enter other products you want to order, use the Add Items to Shopping Cart section by entering the product's part number and quantity and then clicking Add. If you do not know the product number, access the Products tab and search for that product number. You can also add a product to your order directly from the Search Results window.

When you are finished adding products to the order, you can move to various sections of the Shopping Cart by clicking the Continue button. In addition, you can select the To Checkout button to proceed to the final ordering section of the Shopping Cart.



Shipping

The Shipping section of the Shopping Cart is divided into two sections: Shipping Information and Shipping Details.

The Shipping Information section contains the default billing address and a section where you enter shipto information for the order. Enter your shipto

address, purchase order number, type of order, etc., into these fields of the Shipping Details section.

As in the Items section, when you are finished working in the Shipping section, you can move to various sections of the Shopping Cart. To move in linear fashion, click the Continue button to add textual comments regarding the order. In addition, you can select the To Checkout button to proceed to the final ordering section of the Shopping Cart.

Notes

Notes and comments are an excellent way to provide additional information about an order or line item. Notes and comments are similar in that they both provide electronic annotations and can be printed directly on the Pick Ticket. The main difference is that you attach notes to an order or product and comments to a line item.

A note is a record attached to an entire order or product. You can view, modify, create, or delete order notes from the Order Notes window. You can view notes in the Order Details window by clicking View Order Notes.

A product note is indicated by an asterisk (*) or exclamation point (!) next to a product number. The ! means that the note is required; there is valuable information pertaining to the order or the product. You can only view product notes.


Note: From the inquiry windows, you can only view notes, not change them.

A comment is attached to a specific line on an order and is noted in the Line column of the Shopping Cart window by a **com** next to the product line number. From the Items in the Current Shopping Cart window, you can add, change or delete a line comment.

Check Out


Click Check Out when you want to place the order. From this window you can place the order on account, pay for the order by credit card or delete the order. If a Quote order was placed, a Delete Cart and Check Out button displays.

Credit Cards are not immediately processed. They are processed in a Batch update.

 **WARNING:** Once you click Credit Card or Place on Account, you will not be able to delete the order. If you choose to not finish or place the order at this time, the order will display next time you open eSales Center.

Switch Carts

Access different shopping carts when you have multiple orders containing different shipto locations and/or different warehouse locations.

 **WARNING:** Upon access of the shopping cart, you WILL NOT be notified that you have multiple orders. It is your responsibility to make sure you are displaying the correct order by clicking Switch Carts.

Choose an existing order from the first pull-down and then click View Cart to see the products tentatively selected for that order. You can also select a different ship to and/or warehouse location and then click Create Cart to open a new shipping cart (place a new order).

Clear Cart

To completely remove the order, click Clear Cart. After you choose to clear the cart, a message displays asking you to confirm your decision.

Copy Items to the Current Shopping Cart

The Copy Items function is provided to allow you to copy the lines of an existing order to the active Shopping Cart. If no Shopping Cart exists, one will be created. This functionality is accessible from Order Inquiry, Back Orders, or Transaction Listing.

Order Inquiry

Use the Order Inquiry to make inquiries on past and present orders. If known, you can enter an order number. However, you can also inquire via the basic or advanced search function, which will search on various criteria, including shipto address, PO number, order type, and transaction type. The Order Listing window displays the search results.

Back Order

Use Back Order to display a list of current back orders for the company. Customer-Type operators can view product information and order details by clicking the respective hyperlink.

Internal and Administrator-Type operators have the same access to the Back Order window and all of the functionality within the search window, such as being able to search all customer back orders.


Orders Tab Tasks


The following tasks can be performed while working on the Orders tab.

Entering an Order

Enter the order if it is new and there are no existing orders. If you have existing orders, add a new cart by clicking Switch Carts.

Follow the steps below to place an order.

 **WARNING:** eSales Center will hold multiple open orders for different shipto locations and/or different warehouse locations. However, upon access of the shopping cart, you WILL NOT be notified that you have multiple orders. It is your responsibility to make sure you are displaying the correct order by clicking Switch Carts. Refer to the Switching Carts section in this chapter for more information.

- 1 Click the Shopping Cart button  to display the current Shopping Cart window.

Note: If you have multiple orders, click Switch Carts to select the order you wish to purchase.

- 2 Enter a product quantity in the **Order Quantity** field. Then enter the corresponding product number in the Product field.

Note: If you do not know the product number, access the Product Inquiry window by clicking the Products tab. Refer to the section Performing Searches in this chapter for more information about product inquiries.

- 3 Continue to add products and quantities; click Add to include these products to your shopping cart then continue to add more products.

The image shows a web form titled "Add Items to Shopping Cart". It contains three rows of input fields. Each row has an "Order Quantity" field with the number "0" and a "Product" text input field. At the bottom center of the form is a blue button labeled "Add".

- 4 Click Continue when you are finished adding products to your order. The Shopping Cart Shipping Information page displays.
 - 5 Confirm that the shipping information is correct or make any changes. Click Continue, or click To Checkout to go to the Shopping Cart Checkout window.
 - 6 If necessary, add notes to the order. To continue, click Continue, or click To Checkout.
- Note:** If you are on credit hold or on a cash-only basis, you will not be able to place an order.
- 7 Click Clear Cart; you will be asked to confirm your decision. The order will be completely removed. **Or,**
 - 8 Depending on your billing process, click Place on Account and the Order Details window displays with the order number. You will be billed at a later date. **Or,**
 - 9 Click Place on Credit Card to display the Order Details window.

2	1-003	Tap Extension, Size 3/16 Style B, 8"	10	each	4.50	45.00
						Subtotal: 45.00
						Whole Order Discount: 0.00
						Taxes: 0.00
						Total: 45.00


Credit Card Payment

Card Type:

Card Number:

Expiration Date (mmyy):

Name On Card:




VeriSign
Secure Site
Click to verify

- 10 Choose the credit card type you will use from the Card Type pull down field.
- 11 Enter the the credit card number, the expiration date, and the name as shown on the card.
Note: No slash is necessary between the month and the year in the expiration date.
- 12 Click Go.

Switching Carts

eSales Center will hold multiple open orders (shopping carts) for different shipto locations and/or different warehouse locations. However, upon access of the shopping cart, you WILL NOT be notified that you have multiple orders. It is your responsibility to make sure you are displaying the correct order by clicking Switch Carts.

Follow the steps below to change to another shopping cart.

- 1 Click the Shopping Cart button  to display the current Shopping Cart window.
- 2 Click Switch Carts from the index to display the Switch Carts

window.




- 3 Use the **Shopping Cart** pull-down field in the Go to Shopping Cart section to select another order.
- 4 Click Go. The selected order will display in the Shopping Cart window.

Creating a New Shopping Cart

eSales Center allows you to add a new shopping cart (order) without placing the existing order.

Follow the steps below to add a new cart.

- 1 Click the Shopping Cart button  to display the current Shopping Cart window.
- 2 Click Switch Carts.
- 3 Select a shipto customer and warehouse from the Create a Shopping Cart section.
- 4 Select Go. Proceed with the Entering an Order process.


Copying Items to the Current Shopping Cart

Use the following procedure to copy items to the current shopping cart via Order Inquiry.


- 1 Hover over the Orders tab. Click Order Inquiry.

- 2 Look up the order you wish to copy by order number or via the search.
- 3 Select the order number from the Order/Batch column of the Order Listing window. The Order Details window displays.
- 4 Verify that this is the order you wish to copy. Click Copy Items to the Current Shopping Cart. The Shopping Cart window displays.
- 5 Proceed with the regular order entry flow: Shipping, Notes, and Checkout.

Clearing a Cart


 **WARNING:** Once an order has been placed through eSales Center, you cannot cancel it from eSales Center.

Follow the steps below to delete an order *that has not been placed*.

- 1 Click the Shopping Cart button  to display the current Shopping Cart window.
- 2 Click Check Out from the Index.
- 3 Click Clear Cart. You will be asked to confirm your decision.
- 4 Click OK to delete the order.

Placing a Quote

A quote order allows you to receive prices on products without actually submitting an order. A quote is entered like an order: substitutes that are established are displayed on the quote. A quote has no effect on inventory or account balances until your sales representative converts it to a regular stock order.

- 1 Click the Shopping Cart button  to display the current Shopping Cart window.
- 2 Enter a product quantity in the **Order Quantity** field. Then enter the corresponding product number in the Product field.

Note: If you do not know the product number, access the Product

Inquiry window by clicking the Products tab. Refer to the section on Performing Searches in this chapter for more information about product inquiries.

- 3 Click Continue when you are finished adding products to your order. The Shopping Cart Shipping Information window displays.
- 4 Select Quote from the **Order Type** option. Click Continue to access the Notes screen. **Or**,

Shipping Details

PO:

Reference:

Entered: 04/08/03

Requested:

Warehouse:

Instructions:

Ship Via:

Total: \$ 15,000.00

Order Type: Quote
 Sales Order


Disposition: Normal
 Just in Time
 Will Call
 Ship Complete
 Tag and Hold

<< Back Continue > To Checkout >>

- 5 Click Checkout to place the quote. The Order Details for Quote window will display with your quote number.

Adding/Deleting Notes


Follow the steps below to add or delete order notes.

- 1 Click the Shopping Cart button  to display the current Shopping Cart window.
- 2 Click Notes from the Index to access the Shopping Cart Notes window.
- 3 Enter your note or modify existing notes in the text field.

- 4 Click Continue to save your note, or click Delete to remove the note. Otherwise, click a button on the Index or Back to go to that window with no changes being made to the note.

Adding/Deleting Comments

Follow the steps below to add or delete comments from a product line.

- 1 Click the Shopping Cart button  to display the current Shopping Cart window. If there are multiple orders, click Switch Carts to choose the order you want to add or delete a comment from.
- 2 Click the **com** link in the Line column to display the Order Line Comment window.



Line	Product	Description	Qty.	Available	Price	Disc.	Ext.
1	com 3	test	5	0 - each	0.00	0.00%	0.00
2	com 1-016	Tapper *T* handle - 6"	10	43 - each	0.00	0.00%	0.00
3	com 1-131	Conveyor Belt Frame 1 3/4" Black	10	32 - each	1,500.00	0.00%	15,000.00
Total:							\$ 15,000.00

- 3 Enter comments or modify existing comments in the text field.
- 4 Click Add to save the comment, or click Delete to remove the entire comment. Otherwise, click Back to return to the Current Order window.

Inquiring on an Order

Perform order inquiries using either the Basic or the Advanced search windows. The Basic window allows you to enter a minimal amount of information, whereas the Advanced window allows you to narrow your search results much more. Display information about an order by following the steps below.

- 1 Hover over the Orders tab to display the Orders sub-menu.
- 2 Click Order Inquiry to display the Order Inquiry window.
- 3 Enter an order, search via the Basic Order Search function, or for a more detail search, choose Advanced Search.

- 4 Click Go to view the search. The Order Listing window displays with your search results. Click an Order/Batch hyperlink for specific information about an individual order.

Inquiring on a Back Order

Display a list of back orders by following the steps below.

- 1 Hover over the Orders tab to display the Orders sub-menu.

Note: The message “No Back Order Is Found” displays when there are no Back Orders.

- 2 Click Back Order.

- 3 Click a product number to display more information about the product.

Note: If notes are attached to this product, an asterisk (*), or an exclamation point (!) will display next to the product number. Click the asterisk “*” or the exclamation point “!” to display any notes or comments.

- 4 Click an Order No to display the Order Details window, or click a Product to display the Product Details window.