Visual Streamline
Streamline E-Commerce
(formerly WebServices)
## Table of Contents

**Program Overview** .................................................................................................................. 1

**Setup in Visual Streamline**
- Modules ...................................................................................................................................... 2
  - Sub-Modules
    - BUD Budgets .......................................................................................................................... 3
    - COI Contract Items .................................................................................................................. 3
    - FAL Favourites Lists .................................................................................................................. 3
    - HOF Hold for Future .................................................................................................................. 3
    - NEW Newsletters ...................................................................................................................... 4
    - REO Reorder from History ........................................................................................................ 4
    - REP Reporting .......................................................................................................................... 4
  - Business Rules .......................................................................................................................... 5
  - User Rights .................................................................................................................................. 6

**E-Commerce Master Files**
- Overview ...................................................................................................................................... 7
  - Web User Accounts .................................................................................................................... 8
  - E-Commerce Default Controls .................................................................................................. 10
  - Customer Newsletters ............................................................................................................... 12
  - E-Commerce Administrator Accounts ...................................................................................... 13
  - E-Commerce Favourites ............................................................................................................ 14

**Using Streamline E-Commerce**
- Getting Started
  - Login Page .................................................................................................................................. 15
  - Logging In .................................................................................................................................... 16
  - Request a Login Account .......................................................................................................... 17
  - Forgot Your Password? .............................................................................................................. 18
  - Change Your Password ............................................................................................................. 19

**E-Commerce Pages Overview** .................................................................................................. 20

**Common E-Commerce Page Elements**
- Host's Name and Logo ............................................................................................................... 21
  - Current Web User Information .................................................................................................. 21
  - Navigation Tabs .......................................................................................................................... 22
  - Current Page .............................................................................................................................. 23
  - Page Navigation .......................................................................................................................... 23

**Products Page**
- Overview ...................................................................................................................................... 24
  - Current Web User's Budget Information .................................................................................... 25
  - Filtering ....................................................................................................................................... 26
  - Advanced Search ....................................................................................................................... 27
  - Display Matrix (Header) ............................................................................................................ 28
  - Display Matrix (Details) .............................................................................................................. 29
  - Required Shopping Fields ......................................................................................................... 30
  - Shopping Cart ............................................................................................................................. 31
Table of Contents
Using Streamline E-Commerce
Order Submission Process
   Quick Overview ........................................................................................................... 32
   Entering Quantities in E-Commerce ............................................................................ 32
   The Checkout Page ....................................................................................................... 33
   The Print Web Confirmation Page ............................................................................... 34
   Submission Confirmation Email – Web User .............................................................. 35
   Submission Confirmation Email - Sales Rep and CSR ............................................... 36
   Viewing Submission in Visual Streamline (before Order Creation) ......................... 37
   Order Creation Confirmation Email – Web User ................................................................ 39
   Viewing Submission in Visual Streamline (after Order Creation) ........................... 40
   Viewing Submission in Visual Streamline (E-Commerce Submission Lookup) ........ 41
   Viewing Submission in Streamline E-Commerce .................................................... 42
Submissions Page
   Overview ..................................................................................................................... 43
   Filtering ....................................................................................................................... 44
   Display Matrix (Header) ............................................................................................ 45
   Display Matrix (Details) ............................................................................................. 46
Newsletters Page
   Overview ..................................................................................................................... 47
Favourites Maintenance Page
   Overview ..................................................................................................................... 48
Sales Reports Page
   Overview ..................................................................................................................... 49
Budget Reports Page
   Overview ..................................................................................................................... 50
Site Administration Page
   Overview ..................................................................................................................... 51
   Site Options ................................................................................................................. 52
   Maintenance Options ................................................................................................ 53
   Uploads and Downloads ........................................................................................... 54
Program Overview

The Streamline E-Commerce module is a powerful and robust application that seamlessly delivers data between Visual Streamline and the Visual Streamline client’s website. It is available as a separate module that will bring many added benefits to the existing Streamline application.

Streamline E-Commerce offers the following benefits to Visual Streamline clients:
- gives their customers the ability to place, view and track their own orders;
- reduces the number of calls into the order desk regarding inventory pricing and availability;
- data is extracted and uploaded automatically to E-Commerce as it is fully integrated.

The following is a list of the features contained in the standard package of Streamline E-Commerce that is available to Visual Streamline clients:
- web quote and order entry;
- detailed product and order information available;
- full control over viewable data and functionality per web user;
- web users can request additional product information;
- automatic email confirmation to web users of orders and quotes;
- product images can be displayed;
- standard list pricing, customer specific pricing and multiple units of measure (UOM) can be displayed;
- prospective customer can access catalogue or log in as guest users;
- comprehensive search for products;
- quotes and orders are automatically created in Visual Streamline;
- comprehensive and intuitive shopping cart.

The following is a full list of E-Commerce Modules and Sub-Modules available at the time of writing:
- Front page and catalogue functionality 1
- Quote and order entry 2
- Product pricing and availability 2
- Shopping cart functionality 2
- Quotes and orders tracking 2
- Restricted buying based on budgets 3
- Restricted buying based on contracts 3
- Restricted buying based on favourites lists 3
- Holding of orders in E-Commerce for future submission 3
- Reorder from historical quotes/orders 3
- Sales reporting 3
- Newsletters 3

1 Sold as a separate module
2 Sold as a separate module or as a package
3 Sold as a separate sub-module

The integration between the website and Visual Streamline is live… Information entered on E-Commerce over the internet is available instantly in Visual Streamline; and conversely, updates in Visual Streamline are available instantly in E-Commerce.
Streamline E-Commerce needs to be installed and set up by a programmer directly on your site upon purchase. Please email a support specialist at IDMSupport@tecsys.com for assistance if you do not have access to E-Commerce on your system after you have made the purchase. If you have not purchased E-Commerce, and are interested, please contact our sales department.

The purchased E-Commerce modules are controlled by Optional Business Rules, as shown in the screenshot on the right. The controlling business rules are as follows:

- CUS48 – E-Commerce – Enable shopping functionality;
- CUS52 – E-Commerce – Enable products page;
- CUS53 – E-Commerce – Enable submissions tracking;
- CUS54 – E-Commerce – Enable front page/catalogue functionality.

The first three modules are the ones that are typically sold as the E-Commerce standard package.
Setup in Visual Streamline ................................................................. Sub-Modules

Other E-Commerce sub-modules (available for purchase) are controlled by the sub-modules within the E-Commerce integration module, as shown in the screenshot on the right.

The sub-modules are as follows:

**BUD Budgets:**
Some distributors’ customers want to set monthly budgets to which their web orders will be restricted. This module allows budgets to be maintained in Visual Streamline and any orders exceeding that budget will be held in E-Commerce pending authorization from a web user that has been designated as a supervisor or subsequent maintenance from the originating web user.

*NOTE: The budget month against which orders are compared is the month in which the goods will be shipped.*

**COI Contract Items:**
Some distributors’ customers may want to restrict their web orders to only items that are subject to contract pricing. This module allows web users to be restricted in this way via a flag in Visual Streamline’s Web User Account tables. Orders outside of contracts will be held in E-Commerce pending authorization from a web user that has been designated as a supervisor or subsequent maintenance from the originating web user.

**FAL Favourites Lists:**
This module allows distributors to create product lists and link them to their customers. Access can be given to the web users to create their own unique product lists. The Products page in E-Commerce can be filtered to display only items on lists and web users can be optionally restricted to buying items on these lists. Orders outside of these lists will be held in E-Commerce pending authorization from a web user that has been designated as a supervisor or subsequent maintenance from the originating web user.

**HOF Hold for Future:**
This module adds another option to the E-Commerce Checkout Page. Rather than submit the shopping cart as a quote or an order, the web user can opt to ‘Hold for Future’ the items currently in the shopping cart. This will hold the items in E-Commerce where they can be accessed from the Submissions page for submission as a quote or an order at a future date. This effectively gives the web user multiple shopping carts. Currently, held-for-future orders store an expiry date 30 days after the entry date that changes the status from Entered to Expired on the proper date, but has NO effect on the ability to further process or delete these orders.
Setup in Visual Streamline .............................................................. Sub-Modules

**NEW  Newsletters;**
This module allows distributors to link newsletters (but it may be any document) to customers, and therefore web users, for viewing in Streamline E-Commerce. These documents can be linked to all customers, specific customers or even specific ship to addresses (linking can be by inclusion or exclusion). Once linked, the documents will need to be uploaded to E-Commerce by an E-Commerce administrator set up in Visual Streamline. Further these documents can be assigned starting and ending dates, before which or after which they will no longer be available for viewing in E-Commerce.

**REO  Reorder from History;**
This module adds a ‘Reorder’ button to the Details section of Quotes and Orders displayed in the E-Commerce Submissions page. This button will put the items, from the details section in which the button was pressed, into the shopping cart so that a new quote or order may be submitted.

**REP  Reporting;**
This module adds a new Reporting page to E-Commerce. This page will allow the web user to view sales (dollars or quantities) by product or product line starting at any month for any number of months back (from 1 to 12). These reports can be copied and pasted into Excel spreadsheets for further manipulation by the web user.
Setup in Visual Streamline  ................................................................. Business Rules

Behaviour within Streamline E-Commerce can be further controlled by the distributor through the multitude of ever-growing E-Commerce Business Rules found within the Integration tab in the Company Controlled Business Rules, as shown in the mocked-up screenshot below.
Setup in Visual Streamline ................................................................. User Rights

And, of course, there are a few user rights that control user access to the E-Commerce related functions within Visual Streamline, as shown in the screenshot below right.

The applicable rights are as follows:

- **RTWS** Right to Streamline E-Commerce;
- **RTWSDEFS** Right To E-Comm Default Setup;
- **RTWSVP** Right to E-Commerce View Pwd;
- **RTSOWOM** Right to SO Web Order Menu;
- **RTMT** Right to Modify Tables.
Setup in Visual Streamline .................................................. E-Commerce Master Files

Overview

Once E-Commerce has been activated on your site, you will see a new menu option called ‘Streamline E-Commerce’. This menu option allows the user to set up and modify various E-Commerce related master files as follows:

- **Web User Accounts:** This table contains information about users who will be accessing E-Commerce;
- **E-Commerce Default Controls:** This table contains the company’s default E-Commerce display and filter settings that will be applied to each web user, in the absence of settings specific to that user;
- **Customer Newsletters:** This table maps newsletters (but it may be any document) to customers for viewing in E-Commerce. This option is only available if the distributor has purchased the E-Commerce integration sub-module NEW – Newsletters;
- **E-Commerce Administrator Accounts:** This table contains information about the E-Commerce administrators, who are responsible for uploading newsletters, setting E-Commerce session parameters, …;
- **E-Commerce Favourites:** This table maps product lists to customers. These lists may be created by the distributor or the web users themselves. They may be used to restrict purchases, promote specials, display favourites,… The usages are limitless. This option is only available if the distributor has purchased the E-Commerce integration sub-module FAL – Favourites Lists.
- **E-Commerce Categorization:** The categorization tables are only available if the distributor has purchased the E-Commerce integration sub-module CAT-Product Categorization. The category tables allow you to create unlimited customized product categories. The category relationships table allows you to create a tree-structure hierarchy of these categories into which web users will drill to easily find products of interest.

This is an enhanced front end to our standard E-Commerce package creating a more friendly shopping experience for your customers.
Setup in Visual Streamline .................................................. E-Commerce Master Files

Web User Accounts

Clicking on Web User Accounts from the menu will launch the program from which web users can be created and/or modified. This program can also be accessed from the Customers Master File, but in a more limited capacity in that it will only access web users linked to the customer on which the user was parked.

Initially this program will display (as shown in the screenshot on the right), in user code sequence, a list of all users currently set up with access to Streamline E-Commerce.

When web users are set up with access to E-Commerce, they are attached to a customer code, as you are effectively granting your customers’ employees access to your inventory pricing and availability.

The web user’s name and the name of the customer to which they are linked are always visible once they have logged into E-Commerce.

To begin to set up a new web user, click on the NEW button from the screenshot shown above. The system will then display a blank screen, as shown in the screenshot below, that will enable you to enter information for your new web user.

The top half of the screen deals with information about the user, while the bottom half of the screen has various tabs containing information about the web user’s access, defaults and settings for each of the Streamline E-Commerce modules.

The information contained in the top half of the screen (highlighted area in the screenshot to the right) is as follows:

**User ID**

This field contains the ID with which the web user will log in to E-Commerce.

**User Name**

This field contains the web user’s name in full.

**Customer ID**

This is the Customer code to which the web user is linked.

**Default ShiptoID**

This field represents the web user’s Shipto ID that will initially be presented and upon which pricing and availability will be based.

**Email Address**

This field contains the email address for the web user. This is the email address to which confirmations, product information requests, acknowledgments, forgotten passwords, … will be sent.

**User Password**

This field contains the password that is required for the web user to log in to E-Commerce.

**Warehouse**

This field contains the warehouse against which availability will be determined and orders will be placed. **NOTE:** In the absence of this field, availability will be determined and orders will be placed using the customer’s default warehouse. In the absence of a customer default warehouse, availability will be determined and orders will be placed using the products’ default warehouses.

**User Language**

This field contains the language of the web user. This language has no effect in E-Commerce other than to display the product descriptions in the chosen language (if descriptions don’t exist in that language, the description field will be <blank>).
Setup in Visual Streamline ............................................. E-Commerce Master Files
Web User Accounts

As stated earlier, the bottom half of the screen of the screen has various tabs containing information about the web user’s access, defaults and settings for specific E-Commerce functions. Each tab represents a particular E-Commerce function, and they each contain similar groupings of information relating to accessibility, filters, defaults and options for the web user within that function.

The screenshot on the right shows Product Pricing (highlighted area in the screenshot to the right). This document will only be generalizing the similar groupings within each tab, rather than detailing the fields contained within each tab as they are self-explanatory.

Each tab has similar prompts or groups of prompts that fall into the following categories:

**Allow Access**  This checkbox determines whether the web user is allowed access to the applicable E-Commerce function.

**Inclusion Filters**  This group contains the web user’s filters settings that will be applied to the data for the particular E-Commerce function. These settings are much more specific than the settings that are maintained by the Edit Settings button at the bottom of the screen (see below).

**Display Defaults**  This group contains the default settings that will be presented to the web user for the particular function each time that they log in to Streamline E-Commerce.

**Other Options**  This group contains any other parameters that will apply to the web user for the particular function.

And, lastly there is the bottom section of the page containing buttons for assigning other settings and filters, as well as saving or cancelling any modifications that have been made to this point.

The screenshot on the right shows the buttons that are available. The buttons function as follows:

**Edit Settings**  This button launches the company default settings program (which is described on the next page), but allows for web user specific settings to be created. This button will be bolded if web user-specific settings already exist, and will be non-bolded if the web user is subject to the company default settings.

**Remove Settings**  This button will remove any web user-specific settings making the web user dynamically controlled by the company web default control files. This button is only enabled if web user-specific settings exist.

**ShipTo**  This button launches a program to grant or restrict the web user access to the customer shipto addresses.

**Save**  This button saves modifications.

**Cancel**  This button cancels any changes that have been made and goes back to the initial browse screen.
Streamline E-Commerce has been designed in such a way that it offers a lot of flexibility and control in terms of security and access to your company’s data. As a company, you fully control the data that will be available to your customers’ web users.

Clicking on E-Commerce Default Controls from the menu will launch the program from which default E-Commerce settings can be created and/or modified. These default controls will be applied to any web user to which specific settings have not assigned. There are three different types of default settings that can be controlled from within this program, each controlled under a different tab: Page Display; Product Filters; and Product Search.

**Page Display Settings**
Initially this program will display (as shown in the screenshot below right) the default controls for the Page Display settings for various pages within E-Commerce.

The following is a brief discussion of the various fields, columns and buttons within the Page Display tab.

- **E-Commerce Screen**  This pulldown identifies the screen grid for which display default settings can be assigned. There are many, but in this example, the default settings displayed are for the header details of the E-Commerce Products grid.

- **Database Columns**  This column contains the internal database names for the fields that are available for display on the grid identified in the E-Commerce Screen pulldown (these fields are hard-coded and cannot be altered by the Streamline user).

- **Column Headings**  This column contains the field labels that the web user will see on the E-Commerce grid identified in the E-Commerce Screen pulldown.

- **Display**  This column contains integers representing the order in which the database fields will display on the E-Commerce grid identified in the E-Commerce Screen pulldown (a display value of zero means that the field will not display).

- **Sortable**  This column contains a checkbox to determine whether this field will be sortable by the web user on its applicable E-Commerce screen grid. This field will be disabled if the Display field is zero.

- **Sort**  This column contains integers defining the default sort hierarchy of the data display on the E-Commerce grid identified in the E-Commerce Screen pulldown (a display value of zero means that the field plays no part in the default sort order, a display value of blank means that the field cannot be part of the sort hierarchy).

- **ASC/DESC**  This column identifies the type of sort to be applied to any field that is defined as part of the default sort hierarchy for the E-Commerce grid identified in the E-Commerce Screen pulldown. This field will be disabled if the Sort field is zero.

- **Affected Users**  This button will display a table of web users that are subject to Page Display defaults.

- **Unaffected Users**  This button will display a table of web users that are subject to their own Page Display settings and will not be affected by any change to the web default controls.
Setup in Visual Streamline ........................................E-Commerce Master Files

E-Commerce Default Controls

Product Filter Settings
The screenshot below right shows the Product Filters tab within the E-Commerce Defaults Control program. The E-Commerce Products page has various product-related code dropdowns that allow web users to filter the product display. This tab enables the Distributor to determine the list of codes that will appear in those various dropdowns on the E-Commerce Products page. It is important to note that only products that are gated through these filters will be available to the web user.

The following is a brief discussion of the various fields, columns and buttons within the Product Filters tab.

**Filter Column**
This pulldown identifies the product-related code field to be filtered.

**First Column**
This column contains all the acceptable values for product-related code field.

**Description**
This column contains the description associated with the values displayed in the first column.

**Tag**
This checkbox determines whether or not products containing the product-related code field will be included.

**Affected Users**
This button will display a table of web users that are subject to Product Filter defaults.

**Unaffected Users**
This button will display a table of web users that are subject to their own Product Filter settings and will not be affected by any change to the E-Commerce default controls.

Product Search Settings
The screenshot below right shows the Product Search tab within the E-Commerce Defaults Control program. The E-Commerce Products page has a Search option whereby the web user can enter a keyword or keyword(s) for which to search. Further there are Advanced Search options which allow the web user to identify fields in which to search and the manner with which to search.

This tab enables the E-Commerce host to determine the default list of product fields and manner of search.

The following is a brief discussion of the various fields, columns and buttons within the Product Search tab.

**Search Fields**
These checkboxes identify the default product fields in which key words will be searched.

**Search Options**
These radio buttons identify the default manner with which key words will be searched.

**Affected Users**
This button will display a table of web users that are subject to Product Search defaults.

**Unaffected Users**
This button will display a table of web users that are subject to their own Product Search settings and will not be affected by any change to the E-Commerce default controls.
Setup in Visual Streamline ............................................................... E-Commerce Master Files
Customer Newsletters

NOTE: This functionality is only available if the E-Commerce sub-module NEW (Newsletters) has been purchased and is described in full in the White Paper for E-Commerce Newsletters module.
Setup in Visual Streamline ....................................................... E-Commerce Master Files

E-Commerce Administrator Accounts

There are certain required functions in E-Commerce that remain the responsibility of the distributor and should not be accessible to the web users. For these functions, there is a requirement for an E-Commerce administrator. These functions are mentioned in the Logging In section of this document and described in detail in the Site Administration Page section of this document.

Clicking on E-Commerce Administrator Accounts from the menu will launch the program from which these administrators can be created and/or modified.

Initially this program will display (as shown in the screenshot on the right), in creation sequence, a list of all web administrators currently setup in the current company.

NOTE: Web administrator IDs cannot be duplicated across companies, but, each web administrator only administers E-Commerce for the company in which they were created.

To create or modify a Web Administrator, click on the NEW or MODIFY button from the screenshot shown above. The system will then display a screen, similar to the one shown in the screenshot below, that will enable you to enter or edit information for your Web Administrator.

The information required in a E-Commerce Administrator Account record is as follows:

**Administrator ID**
This field contains the ID with which the administrator will log in to E-Commerce.

**Administrator Name**
This field contains administrator’s name in full.

**User Password**
This field contains the password that is required for the administrator to log in to E-Commerce.

**Email Address**
This field contains the email address for the administrator. This email address is not yet in use. Emails with a salutation of ‘E-Commerce Administrator’ are currently determined by the following hierarchy:
- the Sales Rep of the Customer linked to the Default Catalogue User;
- the E-Commerce Administrator Default Email in the Company Info File.
Setup in Visual Streamline .................................................. E-Commerce Master Files
E-Commerce Favourites

NOTE: This functionality is only available if the E-Commerce sub-module FAL (Favourites Lists) has been purchased and is described in full in the White Paper for E-Commerce Favourites Lists module.
Using Streamline E-Commerce ........................................................................................................ Getting Started

Login Page

The distributor will be provided with a URL for E-Commerce that can be clicked or launched from Internet Explorer. This link can be attached to their website for easy access by their customers.

The opening E-Commerce Login page will vary depending on the modules that have been purchased.

If the module for Front Page and Catalogue Functionality has been purchased, the opening E-Commerce page will look something like the screenshot shown here.

There is a catalogue button to allow customers that do not have a login account to browse the catalogue and place an order.

There is also a section to allow either Web Users or Administrators, that have been setup as described in the Web User Accounts and E-Commerce Administrator Accounts sections earlier in this document, to log in to E-Commerce.

If the module for Front Page and Catalogue Functionality has not been purchased, the opening E-Commerce page will look something like the screenshot shown here.

There is an area to allow either Web Users or Administrators, that have been setup as described in the Web User Accounts and E-Commerce Administrator Accounts sections earlier in this document, to log in to E-Commerce.

There is also an area to allow existing or new web users to request, review or change login accounts. These functions are described in detail later in this document.

NOTE: A guest user account can be set up such that it is linked to a Miscellaneous Customer. Guest users would then be required to enter name and address when submitting orders. Any order submitted by a Miscellaneous Customer will generate a quote regardless of business rule settings.
Using Streamline E-Commerce ......................................................... Getting Started

Logging In

In order to successfully log in to E-Commerce, a valid account and password previously set up in Visual Streamline must be provided. This account may represent a Web User or an E-Commerce Administrator.

If the account and password provided represent those of a web user account, then E-Commerce will present a page that looks something like the screenshot shown on the left.

If the account and password provided represent those of an E-Commerce administrator account, then E-Commerce will present a page that looks something like the screenshot shown on the right.

The functions available from this screen are described in further detail in the Site Administration Page section of this document.
Typically, E-Commerce is accessed from the distributor’s web page which is openly accessible. Should E-Commerce be accessed from within the distributor’s web page by an individual who does not currently have a web user account, they can make the request by launching the Request a Login Account page via the appropriate link from within the Select Another Option group on the E-Commerce Login Page.

The ‘Request a Login Account’ text link will launch the Request a Login Account page, from which the individual will be asked to provide pertinent information to the distributor so that a web user account can be created.

The OK button, after confirming that all mandatory information has been provided, will send an email to the default E-Commerce Administrator (as set up in the Company Info file), as shown below.

After a determination has been made as to the needs of the individual requesting the login account, the web user account will be set up with the information provided, a password, appropriate filters and access.

The web user will need to be advised by phone or email on completion, as there is currently no automated process for this.
Using Streamline E-Commerce ........................................... Getting Started

Forgot Your Password?

It is not unusual for individuals to have multiple passwords for various reasons… debit card PINs, banking websites, shopping networks, home computers, business computers… And there is always that standing rule that passwords should never be written down. So it is understandable that passwords get forgotten.

Should an individual forget their password, they can request an email containing their forgotten password, by launching the Forgot Your Password? Page via the appropriate link from within the Select Another Option group on the E-Commerce Login Page.

The ‘Forgot Your Password’ text link will launch the Forgot Your Password? page, from which the individual will be asked to provide pertinent information to the distributor so that the forgotten password can be emailed.

The only field required by Visual Streamline is the User ID, as the email address can then be extracted from the Web User Account files.

The Reset button at the bottom of the page will clear any information already entered.

The ‘Return to Customer Login’ text link will take the individual back to the login page with nothing submitted to the distributor.

The OK button, after confirming that a valid User ID has been supplied, will send an email to the email address associated with the User ID entered as shown below.

Provided that the individual has indeed provided a User ID that was associated with them, they will receive the email and will then be able to log in to E-Commerce.
Using Streamline E-Commerce ............................................. Getting Started

Change Your Password

Should an individual want or need to change their password, they can do so by launching the Change Your Password page via the appropriate link from within the Select Another Option group on the E-Commerce Login Page.

The ‘Change Your Password’ text link will launch the Change Your Password page, from which the individual will be asked to provide information so that the password can be changed.

The OK button, after confirming that valid information has been provided, will make the requested password change.

The information provided must pass the following validity checks:

- User ID must be valid;
- Old Password must be the correct password for the User ID provided;
- New Password must be non-blank AND different than Old Password;
- Confirm New Password must match New Password;

NOTE: All fields are case insensitive.
Using Streamline E-Commerce ................................. E-Commerce Pages Overview

Overview

At the time of the writing of this document, there are seven different E-Commerce pages that can be accessed via the E-Commerce Navigation tabs, after successfully logging in to E-Commerce. The seven E-Commerce pages are as follows:

- Products;
- Submissions;
- Newsletters;
- Favourites Maintenance;
- Sales Report;
- Budget Reports
- Site Administration.

Their individual functionality will be discussed in detail later in this document. The purpose of this section is to identify elements that are common to all E-Commerce pages so that they need only be discussed once rather than revisited when discussing each E-Commerce page in detail.

Each E-Commerce page contains elements that are common to all pages as well as elements that are unique unto themselves. The common elements that all pages share are as follows:

- Distributor’s Name and Logo;
- Current Web User Information;
- E-Commerce Navigation Tabs;
- Current Web Page;
- Page Navigation;

These elements will be explained in detail in the pages that follow. Since, the Products page is the page with which users will be most familiar, these elements will be discussed and highlighted using screenshots from the Products page.
Using Streamline E-Commerce ..................... Common E-Commerce Page Elements

E-Commerce Host’s Name and Logo

The page element being described here is shown in the screenshot below as the exploded area. This element is common to all E-Commerce pages. This page element contains the distributor's company logo, name and address information. This information needs to be set up by a programmer directly on your site upon purchase.

Current Web User Information

The page element being described here is shown in the screenshot below as the exploded area. This element is common to all E-Commerce pages. This page element contains the current Web User’s full name (from the Web User table) and the name of their company (from the A/R Customer table) and the currently identified ship-to address. The current web user may be responsible for multiple ship-to addresses, so there is a dropdown here to allow the web user to identify the appropriate ship-to address. As long as the shopping cart is empty, the ship-to address can be changed at any time and the contents of each web page will be changed to reflect the currently identified ship-to address.

Welcome: Steven Michael Weiss (Web User STEVE) (Steve's Test Customer)
ShipTo ID: Charles Weiss
Using Streamline E-Commerce ..................... Common E-Commerce Page Elements

E-Commerce Navigation Tabs

The page element being described here is shown in the screenshot below as the exploded area. This element is common to all E-Commerce pages. These tabs allow the web user to navigate to the various pages within E-Commerce. The tabs that are present are dependent upon the modules purchased. The pages launched by the tabs in the illustration on the right are as follows:

**Products**

The Products page shows the distributor’s products. This is the page that will be used the most as it is from this page that the web user shops. The products and information shown to the web user, both in the regular view and the additional information available via the Show Details chevron, are determined by the distributor as explained in the Setup (Web Default Controls) section of this document.

**Submissions**

The Submissions page displays quotes and orders that have already been submitted. Depending on modules purchased, the Submissions page may also contain orders that are being held for various reasons (intentionally for future processing, automatically as they are over-budget, non-contracted items, or outside of favourites lists). Again depending on modules purchased, previous quotes and orders may also be used to initiate new orders.

**Newsletters**

The Newsletters page is only available if the sub-module NEW - Newsletters has been purchased. This page will display newsletters (any document actually) that have been made available to the current web user from within Visual Streamline and that have been uploaded to E-Commerce by an administrator.

**Favourites Maintenance**

The Favourites Maintenance page is only available if the sub-module FAL - Favourites List has been purchased and the web user has been granted access to this functionaility. This page will allow web users to create and maintain their own product lists (they may contain favourite items, repeat orders, types of items, …). The lists can be subsequently used as product filters for the products page.

**Sales Reports**

The Sales Reports page is only available if the sub-module REP - Reporting has been purchased and the web user has been granted access to this functionality. This page will allow the web user to view sales (dollars or quantities) by product or product line starting at any month for any number of months back (from 1 to 12). These reports can be copied and pasted into Excel spreadsheets for further manipulation by the web user.

**Budget Reports**

The Budget Reports page is only available if the sub-module BUD - Budgets has been purchased and the web user is subject to a budget. This page will allow the web user to view actual sales (dollars or quantities depending on the figure that is being budgeted), total budget and remaining budget, sorted by budget category starting at any month for any number of months back (from 1 to 12). These reports can be copied and pasted into Excel spreadsheets for further manipulation by the web user.
Using Streamline E-Commerce .................... Common E-Commerce Page Elements

Current Page

The page element being described here is shown in the screenshot below as the exploded area. This element is common to all E-Commerce pages. This page element contains the name of the currently displayed E-Commerce page.

Page Navigation

The page element being described here is shown in the screenshot below in the exploded area. This element is common to all E-Commerce pages. This page element allows the web user to navigate through the pages and pages of product data that may be available as follows:

- **Double Left Arrow** moves to the first page;
- **Left Arrow** moves to the previous page;
- **Go To Page** allows the user to select from a dropdown or specify a page;
- **Page Size** allows the user to change the number of items per page;
- **Right Arrow** moves to the next page;
- **Double Right Arrow** moves to the last page.
Using Streamline E-Commerce .................................................................................................................................. Products Page

Overview

The Products page, as the name implies, displays inventory items and pertinent details. Product filtering and information displayed can be assigned globally or on a web user by web user basis as explained in the Setup (E-Commerce Default Controls) section of this document. The Products page is also the page from which web users will shop. The Products page contains elements that are common to all of the E-Commerce’ pages as well as elements that are unique to the Products page. Since the common elements have been discussed earlier in this document, only the elements unique to the Products page will be described in the following pages.

The elements that will be explained in detail on the pages that follow are:

- Current Web User’s Budget Information;
- Filtering;
- Display Matrix;
- Shopping Cart;
- Required Shopping Fields.

Shown below is a screenshot of a typical Products page.

Normally, only a single line of header information for the product is displayed, but there is a chevron to the left that will show or hide optional product details. There is also a ? icon to allow the user to request further product information.
Using Streamline E-Commerce ................................................................. Products Page

Current Web User’s Budget Information

The page element being described here is shown in the screenshot below as the exploded areas and is only available on the Products page. This functionality is only available if the E-Commerce sub-module BUD (Budgets) has been purchased and if the current web user is subject to a budget.

For any web user subject to a budget there is a table, as shown in the screenshot below in the exploded area, that is automatically displayed whenever the Products page is initially launched or revisited.

There is also a ‘Budgets’ button to allow the web user to hide a displayed budget table or alternatively show a hidden budget table.

This budget display is a table summarizing the budget for the current month (initially). It also has the following characteristics:

- it shows, for each budget category, the budget amount, actual amounts and remaining budget amounts;
- these figures pertain to the currently identified customer and ship-to address;
- any change to the currently identified ship-to address would be immediately reflected in the budget window;
- the web user can scroll backward or forward a month at a time to see past or future budgets.

<table>
<thead>
<tr>
<th></th>
<th>Budget</th>
<th>Used</th>
<th>Remain</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROD 16001C-01</td>
<td>100.00</td>
<td>0.00</td>
<td>100.00</td>
</tr>
<tr>
<td>PROD 16001C-02</td>
<td>200.00</td>
<td>0.00</td>
<td>200.00</td>
</tr>
<tr>
<td>PROD 16001C-03</td>
<td>300.00</td>
<td>0.00</td>
<td>300.00</td>
</tr>
<tr>
<td>PROD 16001C-04</td>
<td>400.00</td>
<td>0.00</td>
<td>400.00</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1,000.00</td>
<td>0.00</td>
<td>1,000.00</td>
</tr>
</tbody>
</table>
Using Streamline E-Commerce ................................................................. Products Page Filtering

The page element being described here is shown in the screenshot below as the exploded area.

The filtering being shown here is unique to the Products page although there is filtering of sorts for most of the E-Commerce pages.

There are various ways in which the web user can set the filters to display only those items that are of interest to them at any particular time. It is important to note that the web user can only filter the product set that may have already been constrained by filters imposed by the distributor. It is also important that ALL filters are considered when displaying data. The filter options available at any given time are as follows:

**Search For**

The web user can enter a keyword against which all products satisfying the current filter settings will be compared and only those items that match will be displayed. There is an Advanced button that allows the web user to specify the fields against which the search will be executed and to further specify the type of search to be executed. This is explained further in the next section.

**Show Products For**

There are several options in this dropdown to allow the web user to further filter the products that are displayed. Some of these options are dependent on the modules that have been purchased. There are options to display only products for which there is contract pricing (Contract Products), only products that the web user has previously purchased (Customer History), only products that are on product lists (Favourite Products – this option will present another dropdown to further select the list) or only products that are in the shopping cart (Shopping Cart).

**ProdLine ID**

This dropdown allows the web user to select specific product lines to display. This dropdown list is built based on the product lines to which the web user has been granted access. There is a business rule (WEB12 – Product Line drop down filter display) to control if and how this drop down will be displayed. It is important to note that the ‘All’ option means ‘All product lines to which the web user has been granted access’.

**SubCategory ID (not shown)**

This dropdown allows the web user to select specific product sub-categories to display. This dropdown list is built based on the sub-categories to which the web user has been granted access. There is a business rule (WEB13 – Sub Category drop down filter display) to control if and how this drop down will be displayed. It is important to note that the ‘All’ option means ‘All product sub-categories to which the web user has been granted access’.

**ProdGroup ID (not shown)**

This dropdown allows the web user to select specific product groups to display. This dropdown list is built based on the product lines to which the web user has been granted access. There is a business rule (WEB14 – Product Group drop down filter display) to control if and how this drop down will be displayed. It is important to note that the ‘All’ option means ‘All product groups to which the web user has been granted access’.

**SubGroup ID (not shown)**

This dropdown allows the web user to select specific product sub-groups to display. This dropdown list is built based on the product sub-groups to which the web user has been granted access. There is a business rule (WEB15 – Product Sub Group drop down filter display) to control if and how this drop down will be displayed. It is important to note that the ‘All’ option means ‘All product sub-groups to which the web user has been granted access’.
Using Streamline E-Commerce ........................................................ Products Page

Advanced Search

The page element being described here is shown in the screenshot below as the second exploded area.

In addition to the filters described in the previous section, there is the Advanced Search option which is perhaps the most powerful of all the filtering methods.

In addition to the Search For keyword(s), the Advanced Search allows the web user to specify the fields against which the search will be executed and to further specify the type of search to be executed.

It is important to remember that the search will only be performed against the product set satisfying the current filter settings.

The search in E-Commerce utilizes Full Text Searching. Full Text Searching is a free, optional component of MS SQL 2000. When installed, it offers a vast array of additional string querying abilities. Full Text Searching allows for string comparisons similar to internet search engines, returning both results and a matching score or weight. With regular TSQL, string matching is usually limited to an exact match, or a wildcard match with the keyword "LIKE." Full Text Searching exceeds this by searching for phrases, groups of words, words near one another, or different tenses of words, such as run, running, and ran.

The web user will specify the fields to search by checking or unchecking the applicable fields in the ‘Search Fields’ section.

The web user will specify the type of search by clicking on the appropriate radio button in the ‘Search Options’ section. The search is initiated by clicking on the Go button.

The options are best illustrated by the examples in the table below:

<table>
<thead>
<tr>
<th>Search For</th>
<th>Option</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>RED BALL</td>
<td>Exact Phrase</td>
<td>RED BALL-PEEN HAMMER</td>
</tr>
<tr>
<td></td>
<td>All Words</td>
<td>RED BALL-PEEN HAMMER</td>
</tr>
<tr>
<td></td>
<td>Any Word</td>
<td>6&quot; RED RUBBER BALL</td>
</tr>
<tr>
<td></td>
<td>Synonyms</td>
<td>6&quot; RED RUBBER BALL</td>
</tr>
<tr>
<td></td>
<td>Begins With</td>
<td>RED BALL-PEEN HAMMER</td>
</tr>
<tr>
<td></td>
<td>Pattern</td>
<td>CRIMSON SPHEROID</td>
</tr>
<tr>
<td>RED BALL</td>
<td>All Words</td>
<td>RED BALL-PEEN HAMMER</td>
</tr>
<tr>
<td></td>
<td>Any Word</td>
<td>RED BALL-PEEN HAMMER</td>
</tr>
<tr>
<td></td>
<td>Synonyms</td>
<td>RED BALL-PEEN HAMMER</td>
</tr>
<tr>
<td></td>
<td>Begins With</td>
<td>CRIMSON SPHEROID</td>
</tr>
<tr>
<td></td>
<td>Pattern</td>
<td>???</td>
</tr>
</tbody>
</table>
Using Streamline E-Commerce ................................................................. Products Page Display Matrix (Header)

The page element being described here is shown in the screenshot below in the exploded area.

The display matrix for the header information of the Products page is determined by the Page Display Settings that have been assigned to the current web user in Visual Streamline.

The Page Display Settings control many properties of the display matrix, such as the following:

- the fields that are displayed for each record;
- the order in which the fields are displayed for each record;
- the column heading for the field;
- sortability of the field (future release);
- justification of the field (future release);
- the order in which records are displayed.

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>ListPrice($)</th>
<th>Discount(%)</th>
<th>SellPrice($)</th>
<th>Availability (OutOfStock)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10JC11V</td>
<td>10C TYPE TUNGSTEN HALOGEN LAMPS 12W (12PK)</td>
<td>1.33</td>
<td>0.00</td>
<td>1.22</td>
<td>0</td>
</tr>
</tbody>
</table>

Each web user can have their own unique Page Display Settings or they can be governed by the company default settings.

The display matrix for the header information of products shown in the exploded area above was based on the Page Display Settings shown in the screenshot on the right.
Using Streamline E-Commerce ........................................................... Products Page Display Matrix (Details)

The page element being described here is shown in the screenshot below in the exploded area.

The display matrix for the detailed information of the Products page is determined by the Page Display Settings that have been assigned to the current web user in Visual Streamline. The Page Display Settings control many properties of the display matrix, such as the following:
- the fields that are displayed for each record;
- the order in which the fields are displayed for each record;
- the row heading for the field;

Each web user can have their own unique Page Display Settings or they can be governed by the company default settings.

The display matrix for the detailed information of products shown in the exploded area above was based on the Page Display Settings shown in the screenshot on the right.
Using Streamline E-Commerce .......................................................... Products Page

Required Shopping Fields

The page element being described here is shown in the screenshot below in the exploded area.

This element is unique to the Products page.
In order for a customer to place an order, they need to be able to enter a quantity and a unit of measure for the product being purchased. Therefore, if the optional business rule CUS48 (E-Commerce – Enable shopping functionality) is turned ON, then UOM and Quantity fields are automatically placed as the final two fields in the product display.
Web users can navigate through or filter the products page as they wish, entering the desired quantity for each item required. If the product is sold in multiple UOMs, then the UOM column will be presented as an editable dropdown (pricing will change to reflect any change in the UOM).
Using Streamline E-Commerce ................................................................. Products Page

Shopping Cart

The page element being described here is shown in the screenshot below in the exploded areas.

This element is currently unique to the Products page.
This shopping cart is currently the only gateway to the Checkout page for submitting (or holding if sub-module HOF – Hold for Future has been purchases) quotes or orders.
The shopping cart icon will appear on the top and bottom of any page of the Products display regardless of filter settings.
Filter settings on the web page will not affect the contents or display within the shopping cart (i.e., if the web user has entered quantities for various type of ‘bolts’ and then filters the products page by searching for ‘nuts’, the bolts will still be in the shopping cart).

Clicking on the shopping cart icon once will open the shopping cart as shown in the screenshot below right. Clicking on the shopping cart icon again will close it.

As with other web pages, the fields that are displayed in the shopping cart can be assigned company wide or per web user.
The products in the shopping cart are currently displayed in the order in which they were entered.
In future releases, the columns in the shopping cart will be sortable.

Products can be easily removed from the shopping cart by clicking the ‘Remove’ button within the shopping cart, or by changing the quantity to zero on the Products page.
Any quantities entered or modified on the Products page while the shopping cart is open will be dynamically created or modified in the shopping cart.
The shopping cart can be cleared using the ‘Clear’ button which will issue a further confirmation window.
The ‘Checkout’ button within the Shopping Cart is currently the only way to submit quotes or orders. The entire order submission will be covered in length later in the next section of this document.

Each web user can have their own unique Page Display Settings or they can be governed by the company default settings.

The display matrix for the detailed information of products shown in the exploded area above was based on the Page Display Settings shown in the screenshot on the right.
Using Streamline E-Commerce .............................................. Order Submission Process

Quick Overview

Web users can submit their shopping cart as a quote or as an order. However, in either case, the web submission will initially create a quote in Visual Streamline. This allows management to review all submissions from E-Commerce without committing any inventory. This is a safeguard that has been put in place to prevent Web Services orders from depleting the inventory. It is important to note that at no time is the immediately staged quote of a submitted order visible to or trackable by the web user.

There are flags and business rules to control this behaviour to suit each user’s needs. Web users can be allowed to submit both quotes and orders, or be restricted to submitting only one or the other. There is also a Business Rule WEB08 (Create Orders directly from Web Quotes) that, if enabled, will automatically turn these immediately staged quotes into orders.

Various emails will be sent to the following addressees at various stages of the process as follows:
- to web users confirming receipt of the submitted quote or order;
- to appropriate sales reps and CSRs advising of web requests;
- to web users when the order has been created in Visual Streamline.

Entering Quantities in E-Commerce

The order submission process is going to be shown in detail from the point at which the web user has entered the quantities (as shown in the screenshot below).

It is important to note that for this example, BR WEB08 (Create Orders directly from Web Quotes) is enabled.

Web Users must ensure that they have correctly identified the ShipTo ID. Pricing shown in the Products display or in the Shopping Cart may vary with the ShipTo ID. AND, the ShipTo ID cannot be changed if there are items in the Shopping Cart.

In order to submit the items in the shopping cart, the web user must click on the Checkout button. This will trigger the Checkout page as shown in the screenshot on the following page.
Using Streamline E-Commerce ...................................... Order Submission Process

The Checkout Page

The screenshot below and to the right shows the Checkout page. For purposes of the flow of this document, the information was entered as shown in the screenshot and the ‘Submit Order’ button was clicked.

There are several editable fields as follows:

**Ship Via:** This field contains a dropdown from which the web user can select the Ship Via code (currently, it only contains the default Ship Via code for the current ShipTo ID).

**Customer P/O:** The attributes of this field vary with conditions. This field may be disabled or mandatory, may allow freeform text and/or may contain a drop down list of acceptable blanket PO numbers depending on customer ‘Purchase Order Required’ flag, linked customer blanket POs and BR WEB07 (Display Customer P/O drop down list).

**Customer P/O Release:** This field is only editable if the Customer P/O field contains a value.

**Moneris Supplemental Data:** This field is only present if BR WEB08 (Create Orders directly from Web Quotes) and BR WEB17 (Auto Authorization of Orders created via the web) are both ON.

This field will be mandatory if the ‘Moneris Supplementary Data Required’ flag is ON for the customer ship to address being processed.

**Rush Order:** This checkbox will populate the Rush Order checkbox in Visual Streamline.

**Special Instructions:** This is a freeform text field that will appear on any emails generated during the order submission process and will be carried in the Comments fields of the created quotes and/or orders.

There are also several buttons on the bottom of the page that function as follows:

**Continue Shopping:** Clicking here will return the web user to the Products page and close the shopping cart. Any previous filters, search parameters will remain intact. Previously entered quantities will also remain intact so that the web user can resume shopping.

**Clear Shopping Cart:** Clicking here, after a secondary prompt, will return the web user to the Products page and close the shopping cart. Any previous filters, search parameters will remain intact. Previously entered quantities will be cleared so that the web user can re-start their shopping experience.

**Hold for Future:** This button only appears if the sub-module HOF – Hold for Future has been purchased. Clicking this button will store the order in E-Commerce, launch the Submissions page with the Held Submissions filter preselected. From this page, these held submissions can be processed (processing will launch the Products page, with the quantities entered and the ‘Show Products’ filter set to Shopping Cart’, so that web users can complete the shopping session) or deleted.

**Submit Quote:** This button only appears if the web user has been granted access to Quote Entry. Clicking this button will submit the selected items and quantities as a quote in Visual Streamline. An order will only be created if it is done manually from Streamline, but the user will be warned that the submission was intended for quoting purposes only.

**Submit Order:** This button only appears if the web user has been granted access to Order Entry. Clicking this button will still submit the selected items and quantities as a quote in Visual Streamline. If BR WEB08 (Create Orders directly from Web Quotes) is ON, an order will automatically be created based otherwise it will need to be done manually from Streamline. **NOTE:** This button will be disabled if the customer is on manual hold.
Using Streamline E-Commerce

Order Submission Process

The Print E-Commerce Confirmation Page

After submitting, the web user is presented with a page similar to the screenshot below.

As with other web pages, the fields that are displayed in the details can be assigned company wide or per web user.

There are buttons on the bottom of the web confirmation page that function as follows:

Print: Clicking the Print button will launch the web user’s local Print dialog so that the confirmation can be printed.

Continue: Clicking the Continue button will launch the page shown below.

NOTE: The submission has already been processed and confirmation emails have already been sent prior to presenting this page, so any action (or non-action, if the session times out) taken from this page will have no effect.
Using Streamline E-Commerce

Submission Confirmation Email – Web User

After submitting, various confirmation emails are triggered. The screenshot below shows the confirmation email that is sent to the web user based on the information contained in all the illustrations to this point.

The email address and salutation are pulled from the ‘Email Address’ and ‘User Name’ fields of the ‘Web User Accounts’ table in Visual Streamline.

In that way, all possible emails relating to a single web submission (quote confirmations, order confirmations, order acknowledgments, over-budget holds, …) will have similar subject lines all referencing the same Web Confirmation Number.

Unlike other web pages, the fields that are displayed in this ‘Details’ section CANNOT be assigned either company wide or per web user.

The text within the confirmation email changes based on the type of submission and BR WEB08. The following text would be sent if an ORDER is submitted with BR WEB08 ON (as above).

Thank you for your Web Order.
This order has been intermediately staged as a quote within our system to be automatically converted to a Web Order.
You will be advised of the order number, once it has been processed.
The details of this web submitted order are as follows:

The following text would be sent if an ORDER is submitted with BR WEB08 OFF.

Thank you for your Web Order.
This order has been intermediately staged as a quote within our system to be manually converted to a Web Order.
You will be advised of the order number, once it has been processed.
The details of this web submitted order are as follows:

The following text would be sent if a QUOTE is submitted regardless of BR WEB08.

Thank you for the opportunity to quote.
You will need to notify your customer service representative if we are to process this quote as an order.
The details of this web submitted quote are as follows:
Using Streamline E-Commerce ........................................... Order Submission Process
Submission Confirmation Email – Sales Rep and CSR

After submitting, various confirmation emails are triggered. The screenshot below shows the confirmation email that is sent to the Sales Rep and the CSR based on the information contained in all the illustrations to this point.

The text within the confirmation email changes based on the type of submission and BR WEB08. The following text would be sent if an ORDER is submitted with BR WEB08 ON (as above).

_A new web order has been submitted by [Web User Name] on behalf of [Customer Name]. This order has been intermediately staged as a quote within our system to be automatically converted to a Web Order._

_The details of this web submitted order are as follows:_

_1. X3 TUNGSTEN HALOGEN LAMPS 10W (120)_: $1,248.00
_2. MINI CARM TUNGSTEN HALOGEN LAMPS 53W 130V/CL_: $2,240.00

_Summary:_

<table>
<thead>
<tr>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>$3,488.00</td>
</tr>
</tbody>
</table>

_A new web order has been submitted by [Web User Name] on behalf of [Customer Name]. This order has been intermediately staged as a quote within our system to be manually converted to a Web Order._

_The details of this web submitted order are as follows:_

_1. X3 TUNGSTEN HALOGEN LAMPS 10W (120)_: $1,248.00
_2. MINI CARM TUNGSTEN HALOGEN LAMPS 53W 130V/CL_: $2,240.00

_Summary:_

<table>
<thead>
<tr>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>$3,488.00</td>
</tr>
</tbody>
</table>

_This is the body of text when the users has submitted an order with BR WEB08 (Create Orders directly from Web Quotes) ON. The text will change based on the nature of the submission and the value of BR WEB08, as outlined below._

The email address and salutation for the Sales Rep email are pulled from the ‘Email Address’ and ‘Name’ fields of the ‘Sales Rep’ table for the Sales Rep linked to the ShipTo Address in Visual Streamline.

The email address and salutation for the CSR email are pulled from the ‘Email Address’ and ‘User Name’ fields of the ‘User’ table for the User linked to the CSR linked to the Web User’s customer in Visual Streamline.

This is the body of text when the users has submitted an order with BR WEB08 (Create Orders directly from Web Quotes) ON. The text will change based on the nature of the submission and the value of BR WEB08, as outlined below.
Using Streamline E-Commerce ........................................ Order Submission Process
Viewing Submission in Visual Streamline (before Order Creation)

Information exchange between Visual Streamline and E-Commerce is almost instantaneous (based on the frequency of the replication process). For example, if a new item is entered in Visual Streamline, it instantly appears in E-Commerce (subject to the web user’s product filters). Conversely, shopping cart submissions from E-Commerce instantly show up in Visual Streamline.

Since ALL submissions from E-Commerce are initially stored as quotes, all web submissions are initially accessible from Sales Order Processing > Processing > Quote Entry (as shown in the screenshot below left). Quotes originating from E-Commerce are easily distinguished from regular quotes within Visual Streamline by the presence of a confirmation number in the Web Confirm column. If the quote originating from E-Commerce actually represents an intermediate staging area for an order, it will be displayed in blue.

The screenshots that follow show the staged quote prior to the automatic creation of the order. These screenshots shown are again based on the information contained in all of the previous illustrations to this point. For purposes of these screenshots, the DXServer was shutdown to temporarily prevent the automatic creation of the order. The order was created as soon as the DXServer was started up again.

This screenshot shows the browse screen for quotes. The highlighted row represents the intermediate staged quote for the order that has been submitted in all previous illustrations to this point.

The highlighted quote is clearly a web submission as it has a confirmation number in the Web Confirm column. It is just as clear that it was submitted as an order since it is shown in blue.

There is a Web Quotes button in the lower right of the screen that will toggle between viewing Web Submissions or All Quotes.

The Select button was clicked to bring up the highlighted quote as shown in the next screenshot.
Using Streamline E-Commerce ............................................. Order Submission Process
Viewing Submission in Visual Streamline (before Order Creation)

This screenshot shows the details of an order that has been submitted in all previous illustrations to this point.

There are several noteworthy fields:

**Type:** Web submissions are always initially identified as document type 'W'.

**Status:** In this example with BR WEB08 ON, the order has a status 'In Process'. See table below for further details about possible values in the Status field.

**Operator:** For web submissions, this field will always contain the Web User ID;

**Quote Type:** Web submissions are identified as quote type WEBQ depending on whether they were submitted as orders or quotes.

It is important to note that, in this example, normal processing for the staged quote has been disallowed. The disabled buttons are as follows:
- Print Quote;
- Delete Quote;
- Modify;
- Create Order;
- Create Contract;
- Close Quote.

See table below for further details about possible processing restrictions within quote entry.

**NOTE:** At no time is the intermediarily staged quote of an order viewable by the web user on the E-Commerce Submissions page.

The following table shows, at various stages, the possible status values and processing allowed for the quote documents that are generated from E-Commerce. All possible scenarios are shown.

<table>
<thead>
<tr>
<th>Stage</th>
<th>BR WEB08</th>
<th>Submitted</th>
<th>Status</th>
<th>Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before Order Creation</td>
<td>ON</td>
<td>Order</td>
<td>In Process</td>
<td>Disabled</td>
</tr>
<tr>
<td></td>
<td>OFF</td>
<td>Quote</td>
<td>Open</td>
<td>Normal</td>
</tr>
<tr>
<td>After Order Creation</td>
<td>ON</td>
<td>Order</td>
<td>Open</td>
<td>Normal</td>
</tr>
<tr>
<td></td>
<td>OFF</td>
<td>Quote</td>
<td>Open</td>
<td>Normal</td>
</tr>
<tr>
<td></td>
<td>ON</td>
<td>Order</td>
<td>Closed</td>
<td>Normal</td>
</tr>
<tr>
<td></td>
<td>OFF</td>
<td>Quote</td>
<td>Closed</td>
<td>Normal</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Order</td>
<td>User Choice</td>
<td>Disallowed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Quote</td>
<td>User Choice</td>
<td>Normal</td>
</tr>
</tbody>
</table>

NOTE: At no time is the intermediarily staged quote of an order viewable by the web user on the E-Commerce Submissions page.

The following table shows, at various stages, the possible status values and processing allowed for the quote documents that are generated from E-Commerce. All possible scenarios are shown.

<table>
<thead>
<tr>
<th>Stage</th>
<th>BR WEB08</th>
<th>Submitted</th>
<th>Status</th>
<th>Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before Order Creation ON</td>
<td></td>
<td>Order</td>
<td>In Process</td>
<td>Disabled</td>
</tr>
<tr>
<td>OFF</td>
<td></td>
<td>Quote</td>
<td>Open</td>
<td>Normal</td>
</tr>
<tr>
<td>After Order Creation ON</td>
<td></td>
<td>Order</td>
<td>Open</td>
<td>Normal</td>
</tr>
<tr>
<td>OFF</td>
<td></td>
<td>Quote</td>
<td>Open</td>
<td>Normal</td>
</tr>
<tr>
<td>OFF</td>
<td></td>
<td>Order</td>
<td>Closed</td>
<td>Normal</td>
</tr>
<tr>
<td>OFF</td>
<td></td>
<td>Quote</td>
<td>Closed</td>
<td>Normal</td>
</tr>
<tr>
<td>OFF</td>
<td></td>
<td>Order</td>
<td>User Choice</td>
<td>Disallowed</td>
</tr>
<tr>
<td>OFF</td>
<td></td>
<td>Quote</td>
<td>User Choice</td>
<td>Normal</td>
</tr>
</tbody>
</table>
Using Streamline E-Commerce

Order Submission Process

Order Creation Confirmation Email – Web User

The screenshot below shows the email that is sent to the web user once an order has been created in Visual Streamline based on the information submitted. Again, these screenshots are based on the information contained in all the illustrations to this point.

As with all previous emails, the subject line contains the Web generated confirmation number and a bracketed blurb describing the nature of the email.

The email address and salutation are pulled from the ‘Email Address’ and ‘User Name’ fields of the ‘Web User Accounts’ table in Visual Streamline.

---

This is an unformatted email from DAVE DEVELOPMENT. Please do not reply to it.

---
Using Streamline E-Commerce ........................................... Order Submission Process

Viewing Submission in Visual Streamline (after Order Creation)

The screenshots that follow show the submitted order after the automatic creation. These screenshots shown are again based on the information contained in all of the previous illustrations to this point.

The screenshot below right shows the browse screen for orders. The highlighted row represents the order that has been submitted in all previous illustrations to this point.

The highlighted order is clearly a web submission as it has a confirmation number in the Web Confirm column. There is no colour distinction to differentiate between quote or order submissions as the order type is present in the table.

The Select button was clicked to bring up the details of the highlighted order as shown in the next screenshot.

This screenshot shows the details of order that has been created from the intermediated staged quote. These screenshots shown are again based on the information contained in all of the previous illustrations to this point.

There are some noteworthy fields:

**Doc Type:** Web submissions are always identified as document type ‘OE’.

**Operator:** For web submissions, this field will always contain the Web User ID;

**Order Type:** Web submissions are identified as order type WEBO or WEBQ depending on whether they were submitted as orders or quotes.

Once the order has been created within Visual Streamline (either automatically via DXServer or manually under operator control, based on web user’s request to turn a submitted quote into an order), the order will be processed in Visual Streamline as any other order. As the order moves through the various stages, E-Commerce will be updated to reflect any changes.
Using Streamline E-Commerce .............................................. Order Submission Process
Viewing Submission in Visual Streamline (E-Commerce Submission Lookup)

There is another program on the menu for specifically looking up Web Submissions. This program can be found under
Sales Order Processing > Processing > E-Commerce Submissions Inq. The program has 2 tabs: Quotes for looking up
web submitted quotes; and Orders for looking up web submitted orders.

The first screenshot below shows the Quotes tab selected. These screenshots shown are again based on the information
contained in all of the previous illustrations to this point.

This screen displays web quotes in a table in the upper portion of the screen showing pertinent fields, with other pertinent
data for the highlighted row in a middle section of the screen and all product particulars in a scrollable table in the bottom
section of the window.

There are some noteworthy buttons:

Details: This button will launch Quote Entry for the quote number on
which the user is currently parked. (This can also be
accomplished by parking on the Quote Number and hitting F5.
In addition, parking on the Order Number and hitting F5 will
launch Order Entry for the
appropriate order number).

Open: This button will toggle back and forth between displaying Open
web quotes and All web quotes.

NOTE: This screen shows web quotes (type WEBQ) ONLY. The web submitted order
that has been used in all illustrations to this point will, therefore, not appear under the
Quotes tab.

The second screenshot below shows the Orders tab selected. These screenshots shown are again based on the
information contained in all of the previous illustrations to this point.

Information and functionality of this screen are identical to the Quotes tab illustrated above.

NOTE: This screen shows any order that
originated from E-Commerce (type WEBQ
or WEBO).
Using Streamline E-Commerce........................................Order Submission Process

Viewing Submission in Streamline E-Commerce

There is, of course, a page for looking at Web Submissions in E-Commerce. This program can be found under Submissions tab. The Submissions page displays quotes and orders that have already been submitted. Depending on modules purchased, the Submissions page may also contain orders that are being held for various reasons (intentionally for future processing, automatically as they are over-budget, non-contracted items, outside of favourites lists). Again depending on modules purchased, previous quotes and orders may be used to initiate new orders.
Using Streamline E-Commerce.......................................................... Submissions Page

Overview

The Submissions page, as the name implies, displays orders or quotes that have been successfully submitted from E-Commerce for the customer and shipto associated with the current web user.

E-Commerce has optional functionality to hold orders for future consideration (sub-module HOF), constrain web users to budgets (sub-module BUD), to restrict web users to contract items (sub-module COI) or to restrict web-users to item lists (sub-module FAL). The Submissions page is the area from which orders or quotes, that are held for future, are over-budget or are outside of imposed restrictions, can be reviewed, repaired and re-submitted by the originating web user or force-submitted by a supervisor. The Submission page is also the area from which orders or quotes can be reordered, provided the Streamline customer has purchased the REO (Reorder from History) sub-module.

Submission filtering and information displayed can be assigned globally or on a web user by web user basis as explained in the Setup (Web Default Controls) section of this document.

The Submissions page contains elements that are common to all of the E-Commerce’ pages as well as elements that are unique to the Submissions page. Since the common elements have been discussed earlier in this document, only the elements unique to the Submissions page will be described in the following pages.

The elements that will be explained in detail on the pages that follow are:

- Filtering;
- Display Matrix.

Shown below is a screenshot of a typical Submissions page.

Normally, only header information of the submission is displayed, but there is a chevron to the left that will show or hide the submission details.

If the customer has purchased the REO (Reorder from History) sub-module, there is a Reorder button that appears on quotes and orders (not on held submissions). This button will take the items and quantities from the quote or order, put them into the shopping cart and launch the products page with the Show Products filter set to Shopping Cart. The same quote or order can be reordered multiple times…multiple quotes or orders can be reordered… all within the same shopping session.
Using Streamline E-Commerce ................................................................. Submissions Page Filtering

The page element being described here is shown in the screenshot below as the exploded area. The filtering being shown here is unique to the Submissions page although there is filtering of sorts for most of the E-Commerce pages. There are various ways in which the web user can set the filters to display only those items that are of interest to them at any particular time. It is important to note that the web user can only additionally filter those submissions to which they have already been granted access from within Visual Streamline. It is also important that ALL filters are considered when displaying data. The filter options available at any given time are as follows:

**Search For**

The web user can enter a keyword against which all submissions satisfying the current filter settings will be compared and only those submissions that match will be displayed. The search will be executed ONLY against those fields that are currently displayed. Date fields cannot be properly searched as the search is performed against the data as it is stored rather than as it is displayed.

**Show Type**

There are several options in this dropdown to allow the web user to further filter the type of submissions (ALL Quotes, User Web Orders, ALL Web Orders, …) that are displayed. Some of these options are dependent on the modules that have been purchased. For instance, there are options to display orders that have been held for future consideration, orders that will generate an over-budget condition, orders that are outside of restrictions that have been imposed on the web user (eg. web user cannot buy items outside of contracts or outside of product lists). Other options are dependent on the web user’s quote and order inclusion filters that are pre-assigned in Visual Streamline. As mentioned earlier in this document, the intermediately staged quote of a submitted order is NOT considered a quote and will therefore not be displayed when the ‘Show Type’ filter is set to display quotes.

**Status**

This dropdown allows the web user to select the status of the types of submissions currently displayed. This dropdown list varies depending on the type of submission currently selected in the Show Type dropdown.

For web quotes, the status dropdown list contains the following:
- **Entered**: the web quote exists in Visual Streamline but an order has not yet been created;
- **Confirmed**: the web quote still exists in Visual Streamline after an order was created in Visual Streamline;
- **Expired**: the web quote has gone past its expiry date.

At no time are web quotes that were deleted, closed or closed after order creation visible to the web user.

For web orders, the status dropdown list contains the following:
- **On Hold**: the order has been placed on hold in Visual Streamline;
- **Open**: the order has an Open status in Visual Streamline;
- **Shipped**: the order has been fully invoiced.

For held submissions, the status dropdown list contains the following:
- **Entered**: the quote/order has not yet been submitted;
- **Expired**: the quote/order has gone past its expiry date.
Using Streamline E-Commerce ................................................................. Submissions Page Display Matrix (Header)

The page element being described here is shown in the screenshot below in the exploded area.

The display matrix for the header information of the Submissions page is determined by the Page Display Settings that have been assigned to the current web user in Visual Streamline.

The Page Display Settings control many properties of the display matrix, such as the following:
- the fields that are displayed for each record;
- the order in which the fields are displayed for each record;
- the column heading for the field;
- sortability of the field (future release);
- justification of the field (future release);
- the order in which records are displayed.

Each web user can have their own unique Page Display Settings or they can be governed by the company default settings.

The Display Matrix for the header information of orders shown in the exploded area above was based on the Page Display Settings shown in the screenshot on the right.

<table>
<thead>
<tr>
<th>OrderDate</th>
<th>Web Number</th>
<th>OrderQty</th>
<th>CustPO</th>
<th>String</th>
<th>ShipVia</th>
<th>Waybill</th>
<th>Update4</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/08/24</td>
<td>816</td>
<td>0001</td>
<td>00000</td>
<td>On Hold</td>
<td>CDU</td>
<td>3</td>
<td>2010/08/24</td>
</tr>
</tbody>
</table>

May 2014

TECSYS Visual Streamline White Paper Series
The display matrix for the detailed information of the Submissions page is determined by the Page Display Settings that have been assigned to the current web user in Visual Streamline. The Page Display Settings control many properties of the display matrix, such as the following:

- the fields that are displayed for each detail line;
- the order in which the fields are displayed for each detail line;
- the column heading for the field;
- sortability of the field (future release);
- justification of the field (future release);
- the order in which detail lines are displayed.

Each web user can have their own unique Page Display Settings or they can be governed by the company default settings.

The Display Matrix for the header information of orders shown in the exploded area above was based on the Page Display Settings shown in the screenshot on the right.
NOTE: This functionality is only available if the E-Commerce sub-module NEW (Newsletters) has been purchased and is described in full in the White Paper for E-Commerce Newsletters module.
Using Streamline E-Commerce  Favourites Maintenance Page

Overview

NOTE: This functionality is only available if the E-Commerce sub-module FAL (Favourites Lists) has been purchased and is described in full in the White Paper for E-Commerce Favourites Lists module.
Using Streamline E-Commerce .......................................................... Sales Reports Page

Overview

NOTE: This functionality is only available if the E-Commerce sub-module REP (Reporting) has been purchased and is described in full in the White Paper for E-Commerce Reporting module.
Using Streamline E-Commerce .................................................. Budget Reports Page

Overview

NOTE: This functionality is only available if the E-Commerce sub-module BUD (Budgets) has been purchased and is described in full in the White Paper for E-Commerce Budgets module.

Some distributors’ customers want to set monthly budgets to which their web orders will be restricted. This module allows budgets to be maintained in Visual Streamline and any orders exceeding that budget will be held in E-Commerce pending authorization from a web user that has been designated as a supervisor or maintenance from the originating web user.
Using Streamline E-Commerce ............................................. Site Administration Page

Overview

There are certain required functions in E-Commerce that remain the responsibility of the distributor and should not be accessible to the web users. For these functions, there is a requirement for an E-Commerce administrator. E-Commerce Administrator Accounts are set up in Streamline as described in the E-Commerce Administration Accounts section of this document.

Logging into E-Commerce as an administrator account will present the Site Administration page that looks something like the screenshot shown on the right.

This page is divided into three distinct sections:

**Site Options**  This section allows the administrator to assign the Home Page URL and the Session Timeout.

**Maintenance Options**  This section allows the administrator to set the E-Commerce state to one of the following states: Online; Maintenance Scheduled; or Maintenance in Progress.

Logging in will not be allowed during the Maintenance in Progress state. Warnings will be issued each time that users navigate to a new page during the Maintenance Scheduled state.

**Potentially Active Users**  This section is for information purposes only. It allows the administrator to determine how many potentially active users are currently on line by showing a list of users that have logged in within the last 30 minutes, 1, 2, 3 or 6 hours.

**Uploads**  This section allows the administrator to make newsletters or other documents available to web users.

*NOTE: This functionality is only available if the E-Commerce sub-module NEW (Newsletters) has been purchased.*

**Downloads**  This section is not currently being used.