Business Online

Business Online allows you to give your customers access to their accounts via the internet.

Customer Access

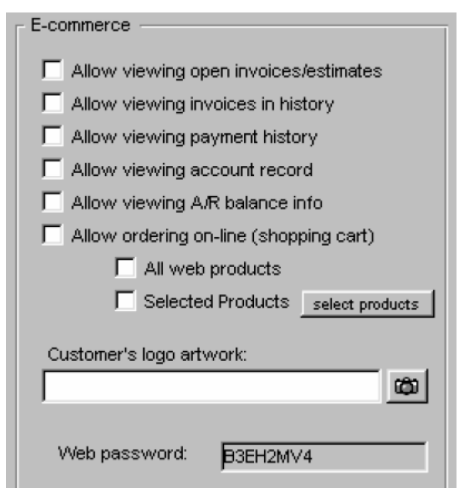
Business Online has security restrictions so that the people logging in will only see what you want them to see. Both applications are also in real-time, so as soon as someone saves a transaction at your company, you can view it online!

You will probably not wish for all of your customers to have access to this application. You determine which customers are made aware of this application as well as what information they are allowed to access.

To give a customer access to **Business Online**:

- Click on the **Financial/Misc** tab within customer maintenance for the specific customer you want to give access to:

- Under **E-Commerce**, check off the features you would like the customer to have access to:



We suggest you inform your customer and implement **Business Online** in the following way:

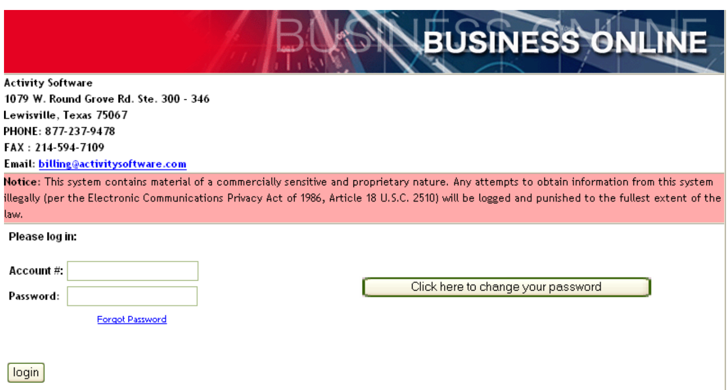
- Using the **Marketing** application, create a mail merge document that introduces the **Business Online** application. Be sure to include their **Account Number** and **Web Password** as merge fields as *they will need this information to log in to **Business Online***. Also, be sure to tell them where to access this information from your webpage. You may wish to create a document for emailing, faxing, and standard mail.

- On your web page you will either need to create a label, button, or menu link option that will redirect your clients to the **Business Online** application.

Our technical support staff will help you set up **ADVNATAGE** to work with **Business Online**, but you will have to make the changes to your website with the technicians that normally help you in your website maintenance. The instructions here are for everyday use of the software. You will receive more instructions from the technician who will help you set up the program.

Logging on to Business Online

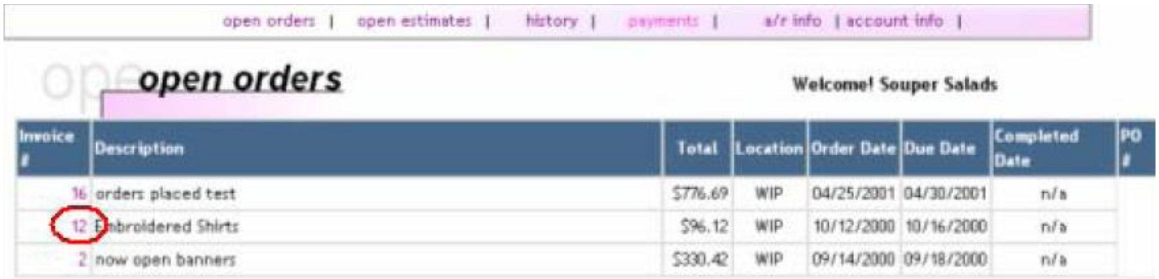
When your customers log on to **Business Online** (the website address will be similar to the following: http://your.ip.address/activity/bo/blogin.asp), they will see a screen like this:



- They will need to enter their **Account #** and **Password** that has automatically been assigned in **Customer Maintenance**.

- If the customer wishes to change their password to something more memorable, they can click **Click here to change your password** and follow the instructions. This changed password will be reflected in **ADVANTAGE** so you can remind them if they forget.

- After the customer logs in, they will see the following:



open orders | open estimates | history | payments | a/r info | account info |

open orders

Welcome! Souper Salads

Invoice #	Description	Total	Location	Order Date	Due Date	Completed Date	PO #
16	orders placed test	$776.69	WIP	04/25/2001	04/30/2001	n/a	
12	Embroidered Shirts	$96.12	WIP	10/12/2000	10/16/2000	n/a	
2	now open banners	$330.42	WIP	09/14/2000	09/18/2000	n/a	

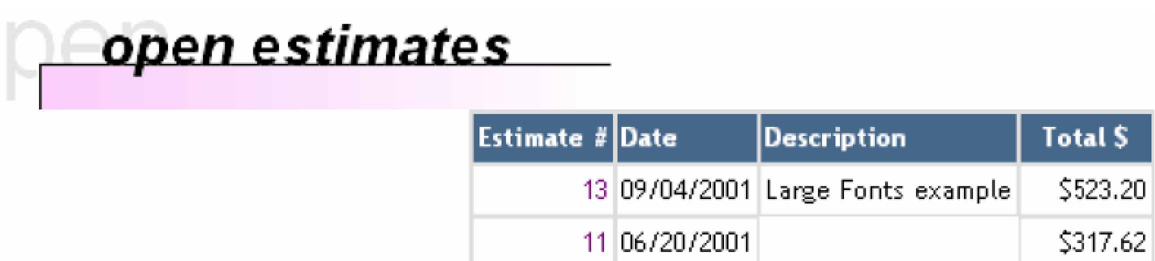
- The menu options at the top will vary according to what you have given specific customers access to. If you have not given the customer access to a particular area, they will not see it in **Business Online**.

Open Orders

- **Open Orders**, as shown above is the first screen customers see. These are all of their invoices in **Work in Progress**. Customers can click on each invoice to see its details.

Open Estimates

- **Open Estimates** is similar to the **Open Orders** screen. The customer will click on the estimate they want to view to see its details:

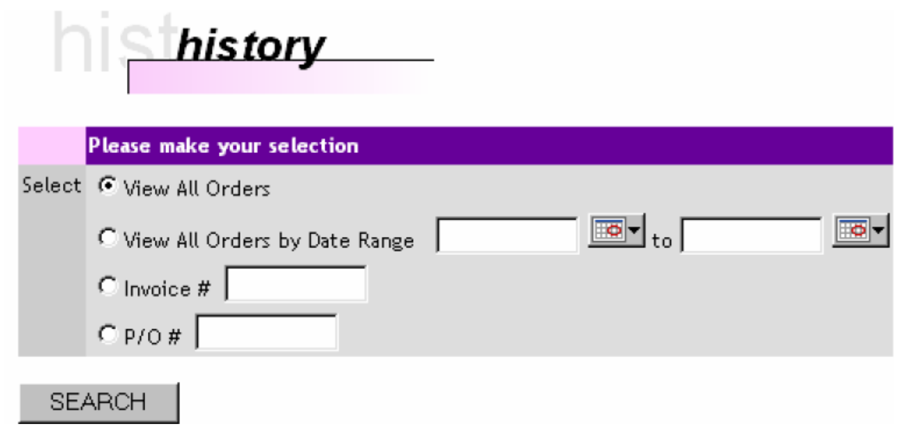


open estimates

Estimate #	Date	Description	Total $
13	09/04/2001	Large Fonts example	$523.20
11	06/20/2001		$317.62

History

The **History** screen provides customers with search options:



- **View All Orders** shows every invoice the customer has ever placed, including open orders.
- **View All Orders by Date Range** shows invoices that were created within the chosen date range.
- **Invoice #** allows customers to look up specific invoice numbers.
- **P/O #** allows customers to look up all invoices associated with a certain purchase order number.
- Clicking on **Search** will show their results based on the chosen filters.

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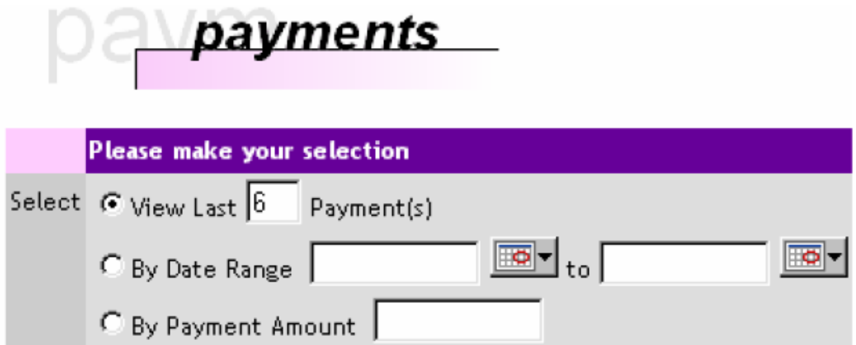
Payments

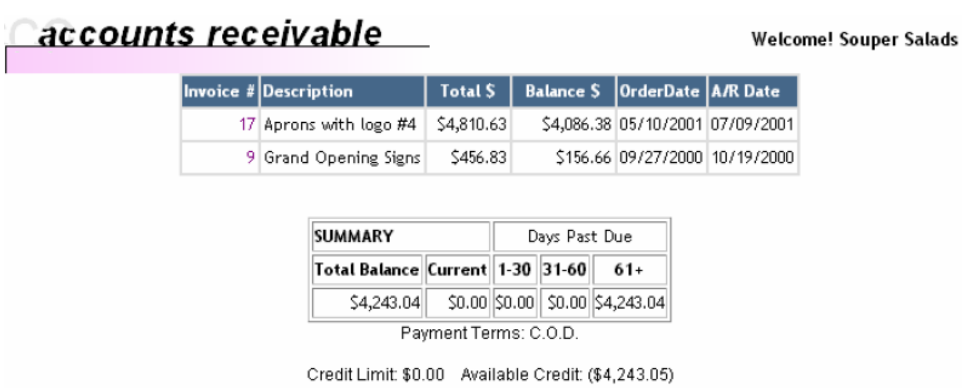
The **Payments** screen gives the customer search options:



- **View Last Payment(s)** allows the customer to lookup their recent payments without specifying a date range or downloading a huge list.
- **By Date Range** allows them to look up payments posted during the given date range.
- **By Payment Amount** allows the customer to look up payments based on amount.
- They will click **Search** to view their results. Again, they can click on the invoice number to view details.

A/R Info

The **A/R Info** screen shows the customer a list of all of their outstanding invoices in accounts receivable. It includes a summary table at the bottom of the list. They can again click on the invoice number to see the details of that invoice:



Invoice #	Description	Total $	Balance $	OrderDate	A/R Date
17	Aprons with logo #4	$4,810.63	$4,086.38	05/10/2001	07/09/2001
9	Grand Opening Signs	$456.83	$156.66	09/27/2000	10/19/2000

SUMMARY		Days Past Due		
Total Balance	Current	1-30	31-60	61+
$4,243.04	$0.00	$0.00	$0.00	$4,243.04

Payment Terms: C.O.D.

Credit Limit: $0.00 Available Credit: ($4,243.05)

Account Info

The **Account Info** screen has all of the general information from the **Basic Information** tab in **ADVANTAGE**. This allows the customer to update their address, phone numbers, and other contact information. The screen shot below is only a partial showing. **Purchaser**, **A/P Contact**, and **Tax Exempt #** are also available for editing. The customer is also shown their **Account Rep**, **Payment Terms**, **Tax Classes**, **Credit Limit**, and **Available Credit**. These fields are for viewing only. The customer cannot make changes to these fields (shown below):

account info

ACCOUNT

Company: Souper Salads

Billing Address

Address 1: 555 Arapaho Rd

Address 2:

Address 3:

City/State/Zip: Dallas TX 75001

Shipping Address

Address 1:

Address 2:

Address 3:

City/State/Zip: Dallas TX

Account Rep: New Signs

Payment Terms: C.O.D.

Tax Class/Rates:City/State Tax - 8.25

Credit Limit: $0.00
Available Credit: ($4,243.05)

Revised: 3/20/07