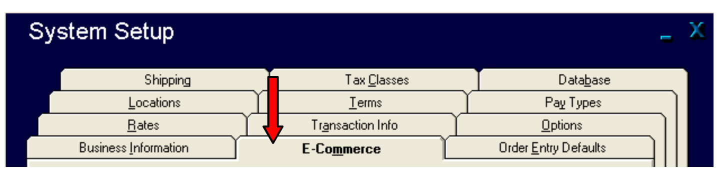
Web Order Processing

This document assumes that either you or Activity Software® has successfully installed web applications previous to following these instructions.

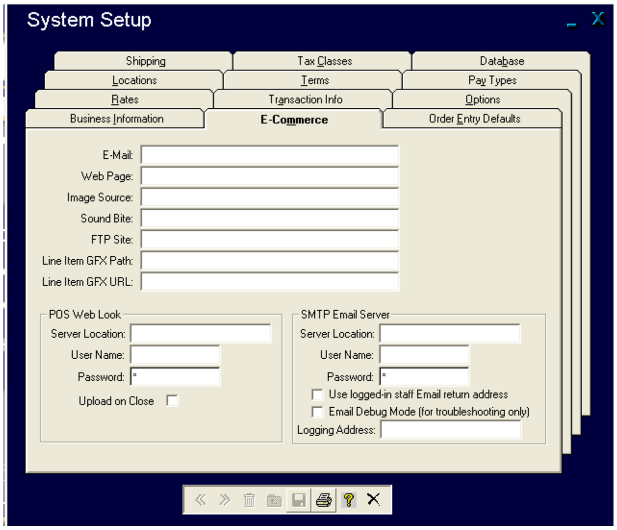
Setting up Web Order Processing within __ADVANTAGE__

- From the **ADVANTAGE** main menu, select **System** then **System Setup**:

- Click on the **E-Commerce** tab:



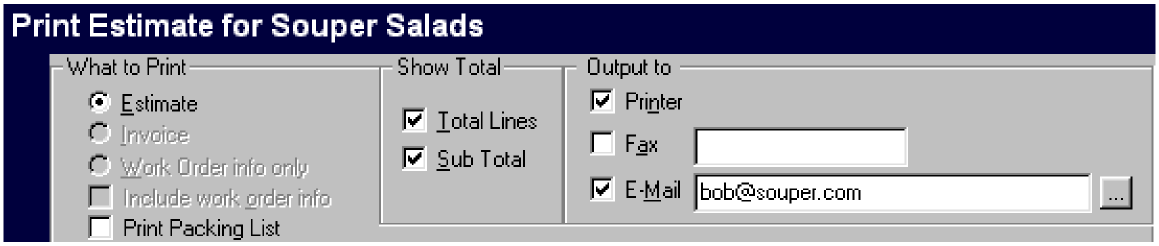
- **ADVANTAGE** displays the **E-Commerce** screen:



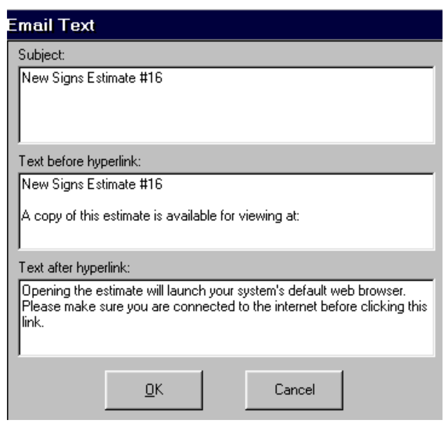
- Fill in the following fields:
  - **Email address** - your general email address such as sales@yourcompany.com
  - **Web page** (if you have a web page) - http://www.yourwebpage.com. This will allow your clients to click on your logo, taking them to your web page (from the various web-applications).
  - **Image Source** - http://127.0.0.1/logo.gif (where 127.0.0.1 is the static IP address for your web server pc) (where logo.gif is your company's logo. This file must be located on your web server pc in the c:\inetpub\wwwroot directory and can be either a .gif or a .jpg file)
  - **Sound Bite** - http://127.0.0.1/sound.wav (where 127.0.0.1 is the static IP address for your web server pc) (where sound.wav is a sound file that plays when your client's receive a emailed Estimate. This file must be located on your web server pc in the c:\inetpub\wwwroot directory. This file is optional. If you choose to record a wav file, be sure to use modest record settings. If you record in the highest quality available, the file will be large and take extra time to download. In other words, record the sound file with the lowest quality acceptable to you.
  - **FTP Site** - (not currently used)
  - **Line Item GFX path** - F:\graphics\ (where F:\graphics is the drive\path to your common shared graphics directory).
  - **Line Item GFX URL** - /graphics/ (where graphics is the same name you used in creating the virtual directory in PWS or IIS).
  - **Server Location** - http://127.0.0.1/activity/eqp/view.asp (where 127.0.0.1 is the static IP address for your web server pc)
  - **Username** - (not currently used)
  - **Password** - (not currently used)

Emailing Estimates

- Create the estimate in normal fashion.
- Proceed to print the estimate as you usually would.



- Check the box next to **E-Mail**.
- You can change the email shown here or enter a new one if the contact did not already have one. If you change the contact's email address, it will ask you if you want to permanently change the email. Simply say **Yes** to change it or **No** to use this as a temporary address only.
- Click on the **Browse** (...) button next to the email address to see the Email Text:



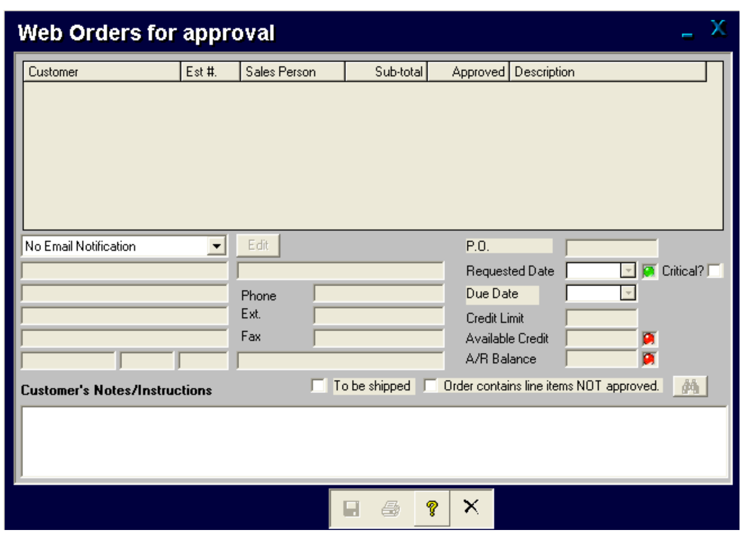
- Click in any of the boxes to change the default notes.
- The customer will receive an email with these notes and a link to the web page of the estimate on your web server. They can then choose which items on the estimate that they want to approve, they can enter notes, a PO#, a requested date for the order to be done, and any other instructions/notes that they want to make. When they are done, they can click on **Make Order**. This estimate will then appear in your **Web Order Processing** area ready to be officially converted.

Converting the Estimate

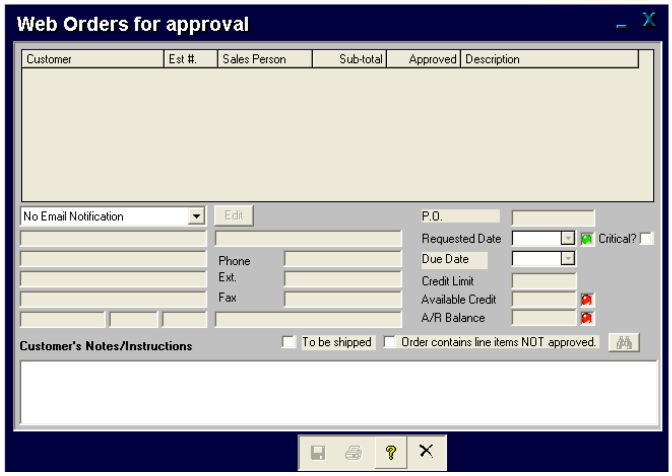
When you email an estimate to the customer, they receive a web page where they can select which items they'd like to order, view the graphics attached to line items, enter any special instructions, and click on **Make Order**. When you open the **Web Order Processing** area, you are looking at the confirmed estimates that have been returned.

- From the **ADVANTAGE** main menu, click on **Order Processing** then **Web Order Processing**:

- **ADVANTAGE** will display the **Web Orders for Approval** screen with a list of web orders available:



You cannot make any adjustments on this screen. If the customer has requested any changes that require you to adjust the estimate (ie. Changing quantity), you must open the estimate in Estimates/Invoices. The customer can select which line items are actually processed when they make the order. The fields in the lower half of the screen are for information purposes. The red and green lights next to the date and currency fields are warning lights to let you know about stretched credit limits and upcoming requested dates. Estimates that are highlighted in red have line items that the customer unchecked.



- Click on the estimate that you want to convert from the list of available estimates.

- Are there any red lights showing on the screen? Next to **Requested Date**, **Available Credit**, and **A/R Balance** there will be either a red or green light. If the customer's **Requested Date** is today or earlier, it will give you a red light. If their **Available Credit** is lower than the A/R Balance, you will get a red light next to **Credit**. If they have past due invoices, the **A/R balance** will be red.

- When you click on the invoice at the top, does it show in blue or red? If it's red, then the **Order Contains Line Items NOT Approved** will be checked. Since a customer can uncheck line items, this warning is set in to tell you if they have refused anything. Click on the binoculars to see the invoice/estimate details to see what's missing.

- Write down or copy/paste any notes from the **Customer Notes/Instructions** field. This is a temporary field. The notes are not saved for future reference. If you are going to copy/paste them, then we suggest you use the **Customer Notes** on the Toolbar to add the notes to the customer's account.

- Be sure that the **Email Notification** selection is correct. You have three choices in the drop down list.
  - **No Email Notification** does not send an email to let the customer know that their order is being processed.
  - **Default Email Notification** sends the customer a standard note which you create by clicking on the Edit button next to the drop down list.
  - **Custom Email Notification** pops up a textbox for you to type in a note that you only want to use this one time for this customer. This note will not be saved for future use.
- Click on **Print** if you want to print a copy of the invoice or the work order. That will automatically save and convert the estimate at the same time.

- Click on **Save** if you want to convert it without printing it.