

eSales Center 5.0 User Guide

**NxTrend Technology's
storefront web application**

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Using eSales Center

This guide explains customer-related functionality within eSales Center. It contains everything you need to search for products, place orders, and manage your account with your distributor. You can, however, also access the online help within eSales Center.

Main Menu

When you initially access eSales Center, the following window displays. Depending on your security levels you may or may not have access to all of the tabs or functions within the tabs.



Accessing eSales Center

Accessing eSales Center requires a login name and password. You can apply for a login by accessing the eSales Center web site and following the instructions on the initial page. While waiting for a login, you can access

product information by entering **wiiq** in both the **Login Name** and **Password** fields.

The following tasks are defined in this section:

- Requesting an eSales Center login
- Logging on to eSales Center
- Logging out

Requesting an eSales Center Login

Use the following procedure to request a login and password.

- 1 Access eSales Center. The following window displays:

here. If you have forgotten your Password, click [Lost Password](#). If you wish to contact us, click: [Contact Us](#). *You do not have an account, you can log in to eSales Center from Product Information by entering 'wiiq' in both the Login Name and Password fields, above.'" data-bbox="355 308 737 682"/>

- 2 Click the **here** hyperlink to apply for a login and password.



eSales Center - New Account Request Form

Your Name: *

Company Name: *

Office Phone Number: *

Office Fax Number:

Your E-mail Address:

* required information

Go

If you are waiting for a Login/Password,
[login](#) as 'wiiq', password 'wiiq' for a limited view of the site.

- 3 Enter your name, company name, office telephone number, fax number, and e-mail address.

Note: The **Your Name**, **Company Name**, and **Office Phone Number** fields are required.

- 4 Click **Go**. You will receive an e-mail notification with your login and password. Once you receive your login and password, you can use eSales Center immediately.

Logging in to eSales Center


Follow the steps below to log in to eSales Center.

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



- 3 Select a company and click **Login**. The eSales Center home page displays.

Logging Out

Use the **Logout** button  to log out of the current session without closing your browser. You can log in again by clicking the **Login** button.



Products Tab

Use the **Products** tab to search for products based on keywords, categories, vendor or ordering history.

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

The following tasks are defined in this section:

- Performing a keyword search
- Performing a product category search
- Performing a vendor search
- Performing an order history search

Searches

A basic search window allows you to perform a search by a keyword, category, vendor, or order history and then narrow that search by warehouse. The advanced search window is used with the keyword type search and is used to enter additional information, such as order number.

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

Performing a Keyword Search

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

You can also click **Advanced Search** to enter additional criteria, which will narrow the search results.

From the **Method** drop-down, you can choose a method of searching for results. The product method will perform cross-referencing if you type in a complete product number.

If you want to narrow the search to a specific type of product, select an option from the **File** drop-down.

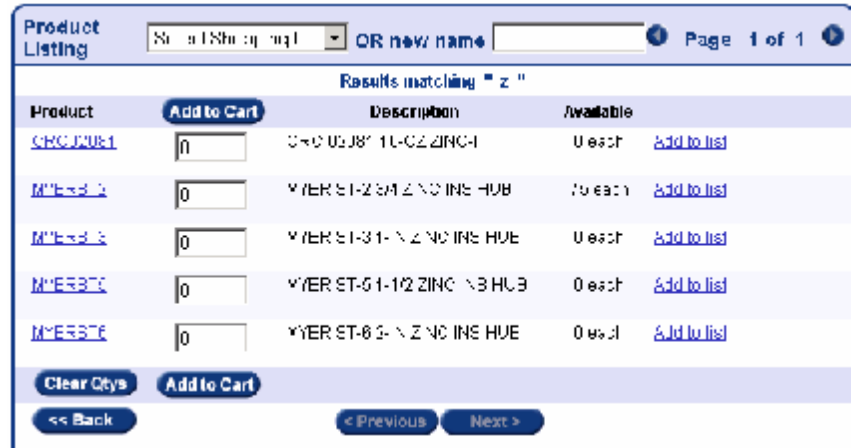
- 1 Hover over the **Products** tab. The Products submenu displays.
- 2 Click **Keyword**. The basic search window displays.

- 3 Enter a keyword into the **Keywords** field; then choose a warehouse from the **Warehouse** drop-down field.
- 4 Click **Go** to perform a basic search. Or, click **Advanced Search** to enter additional search criteria.

Note: If no records match, eSales displays a message that no matching product was found.

- 5 Enter a product number into the **Keywords** field then choose the warehouse.

- 6 Select the type of search from the **Method** drop-down field.
- 7 Select stock items, catalog items, or all products from the **File** drop-down field.
- 8 Click **Go**.



- 9 Click a product number to display more information about that product, such as available quantity and price and other warehouse availability.
- 10 If you want to add a product to your current shopping cart, enter the quantity in the **Add to Cart** field then click the **Add to Cart** button.
- 11 If you want to add a product to an existing shopping list, select a list. Or, to create a new list enter new list name, then click **Go**.

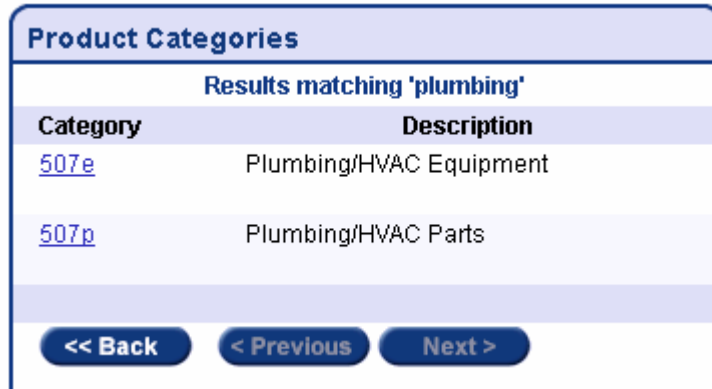
Performing a Category Search

A product category is a method for grouping products together for reporting and distribution. For example, if you are not sure of specific plumbing parts, you can enter plumbing in the category search field. From these results, you can select a category to display specific products from that group.

- 1 Hover over the **Products** tab. The Products submenu displays.
- 2 Click **Category**.

- 3 Enter a product category in the **Category** field; then choose a warehouse from the **Warehouse** drop-down field.
- 4 Click **Go**.

Note: eSales displays a message if no matches are found.



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



- Click a product number to display more information about that product, such as available quantity and price.
- If you want to add products from the list to your current order, enter the quantity of the product in the **Add to Cart** field then click the **Add the Cart** button.
- If you want to add a product to an existing shopping list, select a list. Or, to create a new list enter new list name, then click **Go**.

Performing a Vendor Search

Use the vendor search to find products from a specific vendor.

- Hover over the **Products** tab. The Products submenu displays.
- Click **Vendor**.

Find Products by Vendor ?

Vendor:

Warehouse:

Go

- 3 Enter a product category in the **Vendor** field; then choose a warehouse from the **Warehouse** drop-down field.
- 4 Click **Go**.

Vendor Listing

1 Results matching 'Dynamics'

Vendor No.	Name	1st Address	City	State	Zip Code	Phone #
122	Dynamics Research	1221 Court 12th Street	Oakdale	CA	94345	(916)555-1222

<< Back < Previous Next >

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

Product Listing Select Shopping List OR new name:

Page 1 of 4

Results matching " Vendor: Dynamics Research "

Product	Add to Cart	Description	Available
1-103	<input type="text" value="1"/>	Tap Extension Size C-6 Red You'll Product at 1-103	300 each Add to list
1-111	<input type="text" value="0"/>	103 HP Grinder Buffer 8" Multi-Unit	0 each Add to list
1-112	<input type="text" value="0"/>	34 HP Grinder Buffer 8" Multi-Unit	0 each Add to list
1-113	<input type="text" value="1"/>	Linear Duffel Chd 24" HIF 3-C"	0 each Add to list
1-114	<input type="text" value="0"/>	Printer Buffer Chd 8" HIF 3-P, F, R	0 each Add to list
1-115	<input type="text" value="0"/>	Binocular Buffer 10"	8 each Add to list
1-116	<input type="text" value="1"/>	Linear Duffel w/stand 24" HIF Pre-mounted	2 each Add to list
1-117	<input type="text" value="0"/>	1-117 HI 300 300 FEET BLOC	35 each Add to list

Clear Qties Add to Cart

<< Back < Previous Next >

- 6 Click a product number to display more information about that product, such as available quantity and price.
- 7 If you want to add products from the list to your current order, enter the quantity of the product in the **Add to Cart** field then click the **Add the Cart** button.
- 8 If you want to add a product to an existing shopping list, select a list. Or, to create a new list enter new list name, then click **Go**.

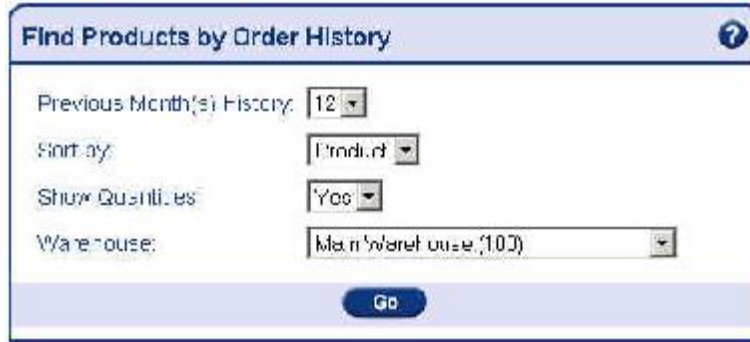
Performing an Order History Search

When you perform an order history search, the returned results list all of the products you have ordered that match the criteria entered. This detailed

list allows you to quickly find items you have purchased in the past for easier re-ordering.

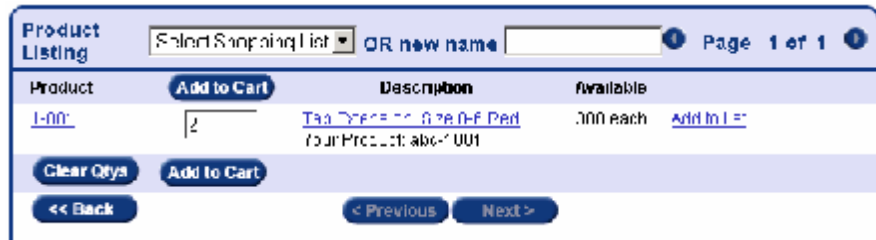
Note: This type of search currently only displays results for the ship-to shown on the Session window.

- 1 Hover over the **Products** tab. The Products submenu displays.
- 2 Click **Order History**.



The screenshot shows a search form titled "Find Products by Order History". It contains four dropdown menus: "Previous Month(s) History" set to "12", "Sort by" set to "Product", "Show Quantities" set to "Yes", and "Warehouse" set to "Main Warehouse (100)". A "Go" button is located at the bottom center of the form.

- 3 From the **Previous Month(s) History** drop-down field, select the number of months of order information you want to include.
- 4 Choose your sort method from the **Sort by** drop-down field.
- 5 If you want to include quantities you previously ordered in the results, select **Yes** from the **Show Quantities** drop-down field.
- 6 Select a warehouse from the **Warehouse** drop-down field.
- 7 Click **Go**.



The screenshot shows a "Product Listing" page. At the top, there is a search bar with "Select Shopping List" and "OR new name" followed by a text input field. The page is labeled "Page 1 of 1". Below the search bar is a table with columns: "Product", "Add to Cart", "Description", and "Available". The table contains one row with product ID "1-00", a quantity of "2" in the "Add to Cart" field, a description "Tap Dressing 8oz 0-F Perf", and "1000 each" in the "Available" column. Below the table are buttons for "Clear Qty", "Add to Cart", "<< Back", "< Previous", and "Next >".

- 8 Click a product number to display more information about that product, such as available quantity and price.
- 9 If you want to add products from the list to your current order, enter the quantity of the product in the **Add to Cart** field then click the **Add to Cart** button.
If you want to add a product to an existing shopping list, select a list. Or, to create a new list enter new list name, then click **Go**.

Orders Tab and Shopping

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

The following tasks are described in this chapter:

- Clearing a cart
- Switching carts
- Creating a new shopping cart
- Entering an order
- Copying items
- Adding and deleting notes
- Adding and deleting comments
- Inquiring on a present/past order
- Inquiring on a back order
- Placing a quote
- Working with shopping lists

Shopping Cart

The shopping cart is divided into four sections: items, shipping, notes, and checkout. There are also two buttons that allow you to clear your cart or change carts.

Use the shopping cart to place an order or create a quote. You can also change information, such as a purchase order number or request date, and view the order lines, shipto information, and order notes.

Warning: eSales Center holds multiple open orders for different shipto locations and/or different warehouse locations. However, upon access of the shopping cart, you are not notified that you have multiple orders. The Cart that displays corresponds to the warehouse and ship-to currently shown on the Session page. It is

your responsibility to make sure you are displaying the correct order. You can verify which cart you are viewing by clicking **Switch Carts**. Refer to the Switch Carts section in this chapter for more information.



Items

Use the Items section of the Shopping Cart to review your order and add any products to the Shopping Cart.

Click the **Items** button from the Shopping Cart Index to add products to the order.

When you are finished adding products to the order, you can move to various sections of the Shopping Cart. To move in linear fashion, you can click **Shipping** or **Continue** to verify or edit the shipping information. In addition, you can select the **To Checkout** button to proceed to the final ordering section of the Shopping Cart.

Shipping

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

The Shipping Information section contains the default billing address and a section where you enter shipto information for the order. Enter your shipto address, purchase order number, type of order, etc., into these fields of the Shipping Details section.

As in the Items section, when you are finished working in the Shipping section, you can move to various sections of the Shopping Cart. To move in linear fashion, you can click **Notes** or **Continue** to add textual comments regarding the order, but you must click **Continue** to save any changes you have made to the Shipping page. In addition, you can select the **To Checkout** button to proceed to the final ordering section of the Shopping Cart, which will also save changes to the Shipping page.

Note: From the Shipping page, you must click **To Checkout** or **Continue** to save changes you have made.

Notes

Notes, along with line comments, are an excellent way to provide additional information about an order or line item. You have the option to attach notes to orders and/or attach comments to line items on your order.

Notes and comments are similar in that they both provide electronic annotations and can be printed directly on the pick ticket.

A note is a record attached to an entire order. There are order notes and products notes. Order notes can be viewed, modified, created, or deleted from the Order Notes window. You can view notes in the Order Details window by clicking View Order Notes.

A product note is indicated by an asterisk (*) or an exclamation point (!) next to a product number. An * indicates that the note is not required. An ! indicates that the note is required; there is valuable information pertaining to the order or the product, and you should read the note before continuing. You can only view product notes.

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

Note: From the Notes page, you must click **To Checkout** or **Continue** to save changes you have made.

Check Out

The check out section of the shopping cart is used when you are ready to place the order or quote?.

From the Checkout page, you can place the order on account, pay for the order by credit card or delete the order. If you created a quote order, a **Clear Cart and Place Quote Order** button displays.

Warning: Once you click **Place on Credit Card** or **Place on Account**, you cannot delete the order.


If you choose not to finish or place the order at this time, you can access the order in the Shopping Cart the next time you open eSales Center.

Clear Cart

Use the **Clear Cart** button to delete orders that have not been placed. Once you place an order through eSales Center, you cannot it from eSales Center. Deleting an order is synonymous with the clearing a cart.

To clear a cart

Use the following instruction to clear a cart.

- 1 Click the **Shopping Cart** button .
- 2 Click **Clear Cart** from any of the 4 Shopping Cart pages. You must confirm your decision.
- 3 Click **OK** to delete the order.

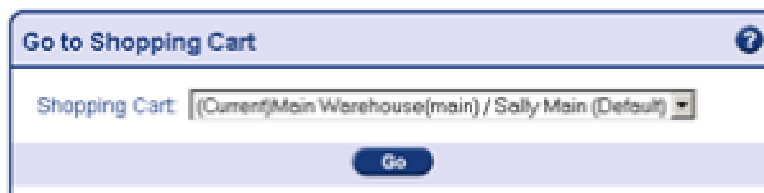
Switch Carts

eSales Center holds multiple open orders (shopping carts) for different shipto locations and/or different warehouse locations. However, upon accessing the shopping cart, you ARE NOT notified that you have multiple orders. The cart that displays corresponds to the warehouse and ship-to currently shown on the Session page. It is your responsibility to make sure you are displaying the correct order. Use the **Switch Carts** screen to verify this.

To switch carts

If you have multiple orders, follow these instructions to switch to a different order.

- 1 Click the **Shopping Cart** button . The current Shopping Cart window displays.
- 2 Click **Switch Carts**. The Switch Carts window displays.



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

To create a new shopping cart without replacing an existing order

Use these instructions to add a new shopping cart (order) without replacing the existing order in eSales Center.


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

Entering an Order

You use the shopping cart to enter new orders, or if you have existing orders, add a new cart by clicking the **Switch Carts** button.

Once you have placed the order, you will receive an e-mail notification that your order has been received.

Warning: eSales Center will hold multiple open orders for different shipto locations and/or different warehouse locations. However, upon access of the shopping cart, you will not be notified that you have multiple orders. Refer to the Switching Carts section in this chapter for more information.

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



The screenshot shows a window titled "Add Items to Shopping Cart". Inside the window, there are three rows of input fields. Each row consists of an "Order Quantity" field (with a "0" in it) and a "Product" field. Below these fields is a blue "Add" button.

Note: If you do not know the product number, access the Product Inquiry window by clicking the **Products** tab. Refer to the section on Performing Searches.

- 3 Continue to enter products and quantities; click **Add** to include these products in your shopping cart.
- 4 Click **Continue >** when you are finished adding products to your order. The Shopping Cart Shipping Information page displays. Or, click **To Checkout** to go the Shopping Cart Checkout window.
- 5 If you clicked **Continue >**, confirm that the shipping information is correct or make any changes. In particular, verify that the Ship To information is correct before changing other settings.

Note: If you have security to only enter quote orders, the **Order Type** field defaults to QU-Quote order, and you cannot change the order type to a sales order.

- 6 Click **Continue >**. The Shopping Cart Notes page displays. Or, click **To Checkout** to go the Shopping Cart Checkout window.
- 7 If you clicked **Continue >**, enter any notes you want associated with this order.
- 8 Click **Continue >**. The Shopping Cart Checkout page displays.

Shopping Cart Checkout

Shipping Information

Bill To:	Ship To:
Grandview Manufacturing	Grandview Manufacturing (doors)
401 Woodman Drive	401 Woodman Drive
Colorado Springs	Colorado Springs
CO 80918	CO 80918

Shipping Details

PO:	Warehouse: Main Warehouse (main)
Reference:	Instructions: No Friday Deliveries
Entered: 07/22/04	Ship Via: LPS Card-Comm
Requested: 07/23/04	

Total: \$ 003.25

[<< Back](#)
[Clear Cart](#)
[Place on Credit Card](#)
[Place on Account](#)

[View Printable Version](#)

- 9 To print the order, click **View Printable Version**. On the printable version page, click **Print**. Your computer's print dialog box displays.
- 10 To place the order on a credit card, click **Place on Credit Card**.
- 11 To place the order on account, click **Place on Account**.

Order Details for Stock Order 1000973-00

Order placed successfully

Shipping Information

Bill To:	Ship To:
ES Systems Inc.	Fleet North Shore
17 Governors Court	23-2 Edinborough Drive
Suite 105	
Lanham	Lanham
MD 21044	CO 81521

Shipping Details

PO:	Terms: 2% 10 Net 30
Entered: 01/20/04	Warehouse: main
Requested: 01/21/04	Ship Via: UPS Ground
Shipped:	Instructions: No Friday Deliveries

Line	Product	Description	Quantity	UOM	Price	Ext.
			Ord.	Ship	B/O	
1	1-102	3x4 FT. On-line Eoffer Motor Unit	1	1	0	156.00
						Subtotal: 156.00
						Whole Order Discount: 0.00
						Taxes: 11.10
						Total: 156.10

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

Copying Items

Use the Copy Items function to copy the lines of an existing order to the active Shopping Cart. If no Shopping Cart exists, one will be created. This functionality is available when accessing an order through Order Inquiry, Back Orders, or Transaction Listing.


To copy items to the current shopping cart

Use these instructions to copy items from an order to the current shopping cart via Order Inquiry.

- 1 Hover over the **Orders** tab to display the Orders submenu..
- 2 Click **Order Inquiry**.
- 3 Find the order you wish to copy by order number or using the Basic Order search function.
- 4 Select the order number from **Order/Batch** column of the Order Listing window. The Order Details window displays.
- 5 Verify that this is the order you wish to copy. Click **Copy Items to the Current Shopping Cart**. The Shopping Cart window displays.
- 6 Proceed with the regular order entry flow: Shipping, Notes, and Checkout.

Adding and Deleting Notes


Follow the steps below to add or delete notes to an order.

- 1 Click the **Shopping Cart** button . The current Shopping Cart window displays.
- 2 Click **Notes** from the Index to access the Shopping Cart Notes window.
- 3 Enter your note or modify existing notes in the text field.
- 4 Click **Continue** to save your note, or click **Delete** to remove the note.

Note: Click a button on the Index or click **Back** to go to that window with no changes being made to the note.

Adding and Deleting Comments

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

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

Shopping Cart Items							
Line	Product	Description	Qty.	Available	Price	Disc.	Ext.
1	com_3	test	5	0 - each	0.00	0.00%	0.00
2	com_1-016	Tapper "T" handle - 6"	10	43 - each	0.00	0.00%	0.00
3	com_1-131	Conveyor Belt Frame 1 3/4" Black	10	32 - each	1,500.00	0.00%	15,000.00
Total:							\$ 15,000.00

[< Previous](#) [Next >](#)
[Continue >](#) [To Checkout >>](#)

- 3 Enter comments or modify existing comments in the text field.
- 4 Click **Add** to save the comment, or click **Delete** to remove the entire comment.

Note: Click **Back** to return to the Current Order window.

Order Inquiry

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

To inquire on an order

- 1 Hover over the **Orders** tab to display the Orders submenu.
- 2 Click **Order Inquiry**. The Order Inquiry window displays.
- 3 Enter an order, search via the Basic Order Search function, or for a more detail search, choose **Advanced Search**.
- 4 Click **Go**. The Order Listing screen displays with your search results.
- 5 Click an order/batch hyperlink for specific information about an individual order.

Back Orders

Use the back order functionality to display a list of current back orders for your company.

Back Order Listing							
Product	Description	Qty.	UOM	Order No.	Line(s)	Order Date	Due Date
1-001	Tap Extension, Size 0-4Red	35.00	each	1005472-01	1	02/16/98	02/17/98
1-005	Tap Extension, Size 3/16Style B, 5"	81.00	each	1005472-01	2	02/16/98	02/17/98

To inquire on a back order

Use these instructions to display a list of back orders.

- 1 Hover over the **Orders** tab to display the Orders submenu.

Note: The message **No Back Order is Found** displays when there are no back orders. Back Orders are currently displayed only for the shipto displayed on the Session page.


- 2 Click **Back Orders**.
- 3 Click a product number hyperlink to display more information about the product.

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

- 4 Click an order number to display the Order Details window.

Placing a Quote

A quote order allows you to view prices on products without actually submitting an order. A quote is entered like an order. A quote has no effect on inventory or account balances and must be converted to a regular stock order by your sales representative before it impacts your account balance.

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

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

- 3 Click **Continue** when you are finished adding products to your order.
- 4 Select **Quote** from the **Order Type** option. Click **Continue** to save the change and access the Notes page.



The screenshot shows a 'Shipping Details' form with the following elements:

- PO:** [Empty text box]
- Reference:** [Empty text box]
- Entered:** 04/08/03
- Requested:** [04/08/03]
- Warehouse:** Main Warehouse (main) [Dropdown menu]
- Instructions:** [Empty text box]
- Ship Via:** [Empty dropdown menu]
- Total:** \$ 15,000.00
- Order Type:** Quote, Sales Order
- Disposition:** Normal, Just in Time, Will Call, Ship Complete, Tag and Hold
- Navigation:** << Back, Continue >, To Checkout >>

- 5 Or, click **To Checkout** to place the quote. After clicking **Place Quote Order**, the Order Details for Quote page displays with the quote number.

Shopping List

The Shopping List functionality allows you to create lists of frequently-ordered products. Once you have created and saved a shopping list, you can use them to create orders. For example, you can copy items from a list or multiple lists to the current shopping cart. Then you can select another list and copy those items to the cart.

To create a shopping list

- 1 Hover over the **Orders** tab to display the submenu.
- 2 Click **Shopping List**.
- 3 Enter the name of the new shopping list in the **create a new list** field.

The screenshot shows the 'Create a Shopping List' interface. At the top, there are three tabs: 'Products', 'Orders', and 'Profiles'. Below these, a blue navigation bar contains 'Shopping Cart', 'Order Inquiry', 'Back Orders', and 'Shopping Lists'. The main content area has a header 'Select a Shopping List: List 2' with a dropdown arrow, followed by 'or create a new list:' and an input field. A 'Go' button is to the right. Below the header, it says 'Products in this list: List 2' with a 'Delete this list' link. A table with columns 'Product', 'Order Qty', and 'Description' is shown. At the bottom are '< Previous' and 'Next >' buttons.

- 4 Click **Go**. You can now enter items to that list.

To add items to a shopping list

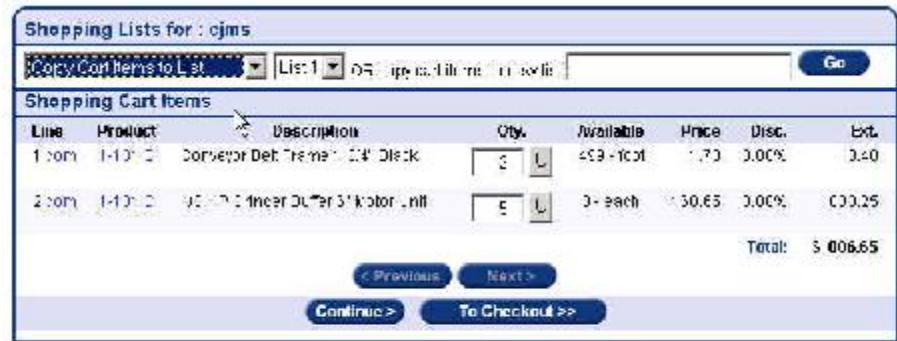
You add items to your shopping list from a shopping cart or from a search.

Note: Before you add items to a shopping list, make sure you have created a shopping list.

- 1 Hover over the **Orders** tab to display the submenu.
- 2 Click **Shopping Cart**.
- 3 Enter the quantity and products in the **Add Items to Shopping Cart** section.

The screenshot shows the 'Add Items to Shopping Cart' form. It has a title bar 'Add Items to Shopping Cart'. Below are three rows of input fields. Each row has 'Order Quantity:' followed by a text box and 'Product:' followed by a text box. The first row has '2' and '1-131'. The second row has '5' and '1-101'. The third row has '0' and an empty box. An 'Add' button is at the bottom.

- 4 Click **Add**. The Shopping Cart page refreshes with your order. Continue to add products, or go to the next step.



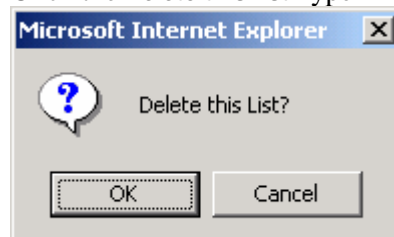
- 5 From the **Shopping Lists for:** section, select **Copy Cart Items to List** from the drop-down list.
- 6 Choose the shopping list from the drop-down list.
- 7 Click **Go**. The items from this cart are copied to your shopping list.
- 8 Proceed shopping.

To view a shopping list

- 1 Hover over the **Orders** tab to display the submenu.
- 2 Click **Shopping Lists**.
- 3 If you have more than one list, select one from the **Select a Shopping List** drop-down list. The list automatically displays.

To delete a shopping list

- 1 Hover over the **Orders** tab to display the submenu.
- 2 Click **Shopping Lists**.
- 3 If you have more than one list, select the appropriate list from the **Select a Shopping List** drop-down list. The list automatically displays.
- 4 Click the **Delete this list** hyperlink.



- 5 Click **OK** to confirm the deletion. The list is deleted.

To copy items to a cart from a list

This function is helpful if you want to use two or more shopping list for a shopping cart or use a shopping list and then add more products.

- 1 Hover over the **Orders** tab to display the submenu.
- 2 Click **Shopping Cart**.

- 3 From the drop-down list, select **Copy Items to Cart from List**.
- 4 Click **Go**. The lines from the shopping list are added to the shopping cart.

Line	Product	Description	Qty.	Available	Price	Disc.	Excl.
1	1-10	1-10 HP (single) Full 16" Mon. Unit	1	11.00	11.00	11.00%	8.8326
2	1-10	1-10 Hewlett-Packard 104" Disk	2	409.00	170.00	0.00%	0.00

Total: \$ 806.09

- 5 Add items from another list, or proceed with shopping.

ProfilesTab

The following tasks can be performed under the **Profiles** tab:

- Viewing your account information
- Changing information for the current session

Account Information

The Account Information page allows you to review your account. You can view information, such as monthly balances and the transactions that make up that balance. Year-to-Date information is displayed along with terms.

Account Information - Grandview Manufacturing			
Contact Information			
Customer ID: 101	Type: xyz		
Grandview Manufacturing	Phone: (719)555-1111		
401 Woodmen Drive	Fax: 5551313		
Colorado Springs			
CO 80913			
Balance Information			
(1) 11/03/03 - 12/03/03	<u>32,347.27</u>	Future Invoice Balance	59,431.90
(2) 10/03/03 - 11/02/03	0.00	Service Charge	0.00
(3) 09/02/03 - 10/02/03	<u>1,522.25</u>	Misc. Credits	- 8,931.83
(4) 08/02/03 - 09/01/03	0.00	Unapplied Cash	30.26
(5) 07/00/00 - 08/01/03	<u>522,385.83</u>	CCD Balance	1,321.90
		Total Balance	608,928.82
Miscellaneous Information			
Credit Limit	99999999	Terms	2% 10 Net 30
Avail. Credit	98,428,050.30	Avg. Days to Pay	51
Down Payments	2,287.26	On Order	963,339.83
Service Chg. YTD	0	Future Order	3,287.72
Cash Disc. YTD	0.00	Last Estmt. Bal.	192,433.97
Unearn. Disc. YTD	0.00	Pror. Start. Bal.	192,400.97
Sales YTD	351,481.69	Last Payment	200.00
Returns YTD	10,081.10	Last Purchase	102.57

Viewing Your Account Information

Follow the steps below to display information about your account.

- 1 Hover over the **Profiles** tab to display the submenu.
- 2 Select **Account**. The Account Information window displays.
- 3 Click a period balance to display the Transaction Listing window and view detailed information about specific invoices.

Viewing Transaction Listings

Use the Transaction Listing page to view order details of an invoice. Once you select a particular invoice, you can copy the items to the current shopping cart or print it.

- 1 Hover over the **Profiles** tab to display the submenu.
- 2 Select **Account**. The Account Information window displays.

Account Information - Grandview Manufacturing			
Contact Information			
Customer ID: 101	Type: MFG		
Grandview Manufacturing	Phone: (712)555-1111		
401 Woodman Drive	Fax: 5551313		
Colorado Springs			
CO 80910			
Balance Information			
(1) 1/1/2003 - 12/31/03	32,947.27	Future Invoice Balance	58,205.97
(2) 1/1/2003 - 12/31/03	1.00	Service Charges	0.00
(3) 09/1/2003 - 10/01/03	<u>5,522.25</u>	Misc. Credits	8,331.83
(4) 08/1/2003 - 09/01/03	1.00	Unapplied Cash	-59.35
(5) 00/0/000 - 08/01/03	<u>22,657.68</u>	CC Balance	1,521.90
		Total Balance	617,342.04
Miscellaneous Information			
Credit Limit	99999999	Terms	2% 10 Net 30
Avail. Credit	31,427,756.71	Avg. Days to Pay	511
Down Payments	2,297.26	On Order	962,750.10
Service Chg. YTD	0	Future Order	3,267.73
Cash Disc. YTD	0.00	Last Stmt. Bal.	192,433.27
Unearn. Disc. YTD	0.00	Print. Print. Bal.	192,433.27
Eclos. YTD	351,091.59	Last Payment	200.00
Returns YTD	11,091.18	Last Purchase	1,025.00

- 3 Click a balance period hyperlink from the **Balance Information** section. The Transaction Listing page for that balance displays.

Transaction Listing			
Invoice No.	Invoice Date	Due Date	Amount
15-00	06:10/03	?	512.21
18-00	11:15/03	?	11.29
19-00	11:05/03	?	11.29
20-00	11:05/03	?	300.20
1001375-00	06:03/03	?	215.27
1001385-00	08:15/03	?	138.47
1001386-00	08:06/03	?	138.47
1001430-00	06:15/03	?	287.18

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- 4 Click an invoice number from the **Invoice No.** column. The Order Details page for that invoice displays.

Order Details for Stack Order 15-00						
Shipping Information						
Bill to:			Ship to:			
Crescent Manufacturing 471 Columbia Drive Colton, CA 95318			Default - Crescent Manufacturing 401 Whittier Drive Colton, CA 95318			
Shipping Details						
PO		Entered:		J03013		
Warehouse: 02		Revised:		050000		
Ship Via: UPS Ground		Shipped:		050000		
Instructions: No Friday Deliveries						
Line	Product	Description	Quantity	UOM	Price	Ext.
	1-001	Tap Extension, Female-6 5 1 Your Product: abc-1111	5	0	84.24	421.20
						421.20
						Whole Order Amount: 512.21
						Taxes: 11.01
						Total: 512.21

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[Copy Items to Current Shopping Cart](#)
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- 5 To view product details, click the product number hyperlink under the **Product** column.
- 6 To copy the items for the invoice to the current shopping cart, click **Copy Items to Current Shopping Cart**.
- 7 To print this invoice, click **View Printable Version**. On the printable version page, click **Print**. Your computer's print dialog box displays.

Session Information

A session is the active connection between you, the user, and a computer, in this case eSales. Each session lasts until you log out or close the browser. It may also time out based on a certain time span of inactivity.

The Session Information page displays information about the active session, such as company number, operator, default shipto address, and warehouse. You can also modify the shipto address, the warehouse number, or page size for this session only. When you log out and log back in, the shipto is the same as it was when you logged out, the warehouse defaults from the first existing Shopping Cart eSales can find (or else your default), and Page Size returns to the default.

The screenshot shows a web form titled "Session Information". The form contains the following fields and values:

- Company: 1000
- Operator/Type: Operator
- Customer / Ship To: 1000
- Warehouse: Warehouse(main) (dropdown menu)
- Shipping Cart: MF0120
- Page Size: 10 Records
- Admin Email: (empty)
- Sales Email: (empty)

An "Update" button is located at the bottom right of the form.

The following table shows information about each field in the Session information screen.

Session Info	Description
Company	Displays your company
Customer / Ship To	Displays the customer number and shipto you are currently using. Select the Ship To hyperlink to change the session shipto.
Warehouse	Choose a session warehouse from the drop-down.
Shopping Cart	If one exists, this field indicates the active shopping cart order number.
Page Size	Change how many rows of results are displayed on various screens.
Operator /Type	Displays the operator information
Login	Displays your login name
Admin Email	The e-mail address new login requests are sent to
Sales Email	The e-mail address quote order notifications are sent to

Setting the Session Shipto Information

- 1 Hover over the **Profiles** tab to display the submenu.
- 2 Click **Session**.

The screenshot shows a form titled "Session Information". It contains several fields: "Company" with a dropdown menu, "Warehouse" with a dropdown menu set to "Main Warehouse", "Page Size" with a dropdown menu set to "8", and "Shipping Cost" with a text input field. There are also fields for "Admin Email" and "Sales Email". An "Update" button is located at the bottom right of the form.

- 3 Click the **Ship To** hyperlink. The Ship To Listing page opens.

The screenshot shows a table titled "Ship To Listing" with 10 columns: "Dist.", "Ship To", "Name", "1st Address", "City", "State", "Zip Code", and "Phone #". There are three rows of data. Below the table are navigation buttons: "< Previous", "Next >", and "<< Back".

Dist.	Ship To	Name	1st Address	City	State	Zip Code	Phone #
101	12345	Generic Manufacturing	1234 5th Avenue	Denver	CO	00920	(718)555-1111
101	67890	Generic Manufacturing	701 Founders Drive	Coltsville Springs	CO	00910	(718)555-1111
101		Generic Manufacturing	One Street in Ohio	Worthington	OH	20115	(718)555-1111

- 4 Click the **Select** hyperlink of the shipto you want to use.

Changing Your eSales Center Display

There are two methods of modifying the display: changing the number of lines displaying and changing the screen resolution. Modifying these settings is a matter of preference and will not affect your data.

To change the number of lines

- 1 Hover over the **Profiles** tab to display the submenu.
- 2 Choose **Session**.
- 3 In the **Page Size** field, enter a number to increase or reduce the number of lines that display.

Note: This function applies to the page size for the Shopping Cart, the Order Inquiry list, the Back Order list, and Shopping Lists only.

- 4 Click **Update**.

All changes made take effect for the current session; the default of 8 lines resets when you log out or close your browser.

To change the screen resolution

Consult your Windows User Guide or Microsoft.com.

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