eCommerce

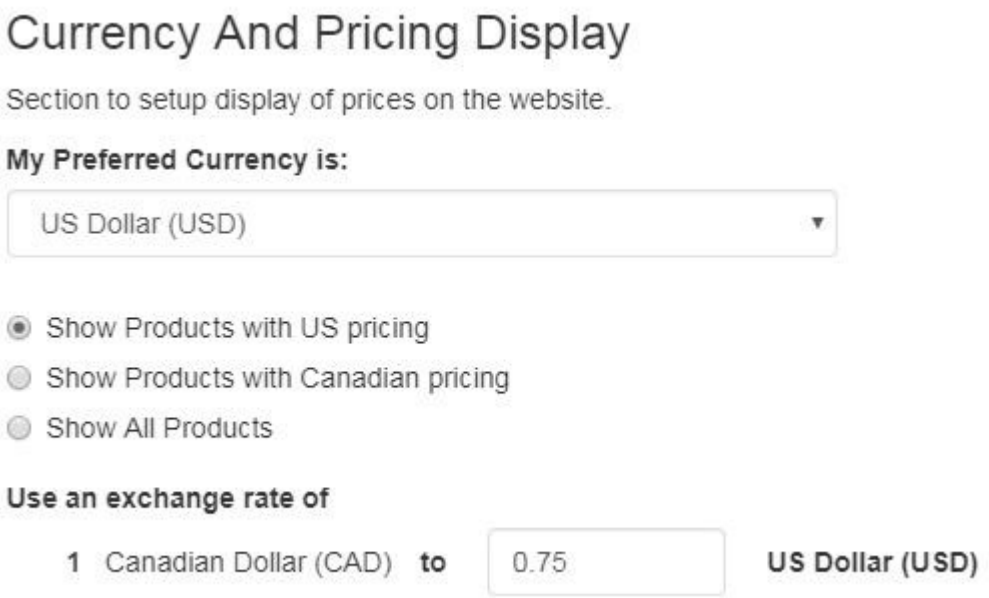
Jennifer M - 2022-07-08 - eCommerce

The eCommerce section enables you to manage the pricing and payment settings for your site, including:

Currency and Pricing Display

This section enables you to determine how the currency and pricing information is shown on the site.

In the Currency and Pricing Display section, you are able to select a default currency for your site. Use the dropdown to select the preferred currency for your site. Use the options below the dropdown to select to show products with only US pricing, only Canadian pricing, or show all products using an exchange rate.

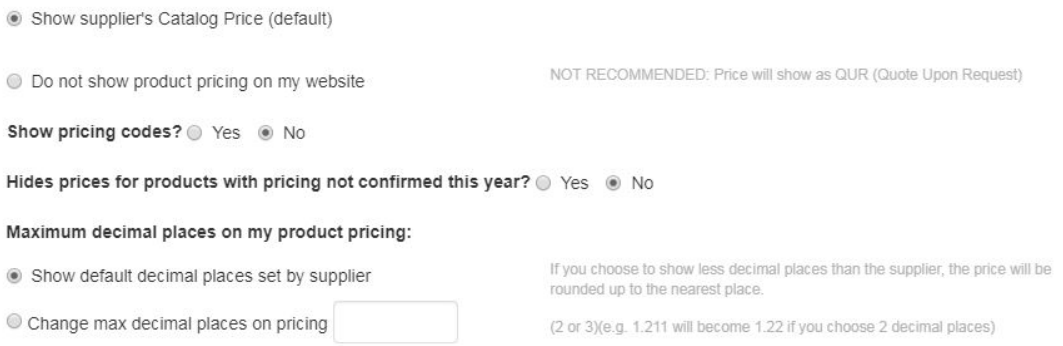


Below the currency section, you are able to establish which pricing information you would like to display. By default, websites are set to show supplier's catalog pricing. If you would like to adjust the product pricing, you can do so in the Price Adjustment and Fees section. If you do not wish to show supplier pricing on your site, click in the circle for "Do Not show product pricing on my website" All pricing will then be displayed as "QUR" (Quote Upon Request).

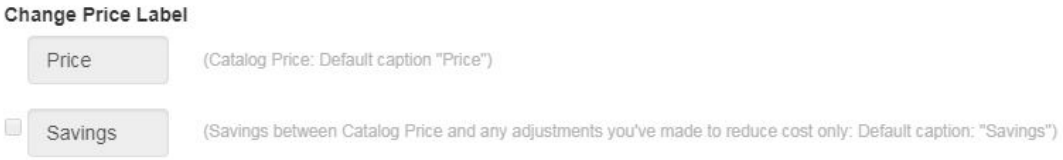
Also in this section, you can choose whether to:

- Show pricing codes

- Hide prices for products with pricing not confirmed this year
- Show two or three decimal places



Also in the Currency and Pricing Display section, you are able to include special labels for the pricing grid by changing the Price Label.



When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Price Adjustments and Fees

Pricing on an ESP Website or Company Store will automatically display the default Catalog Price, meaning the suggested retail price provided by the Supplier. You are also able to adjust price shown on the site based on the net cost. While the net cost (amount to be paid to the supplier by the distributor) will not be displayed on the site, the Catalog Price (also referred to as Price, List Price, or List) can be determined using one of five options.

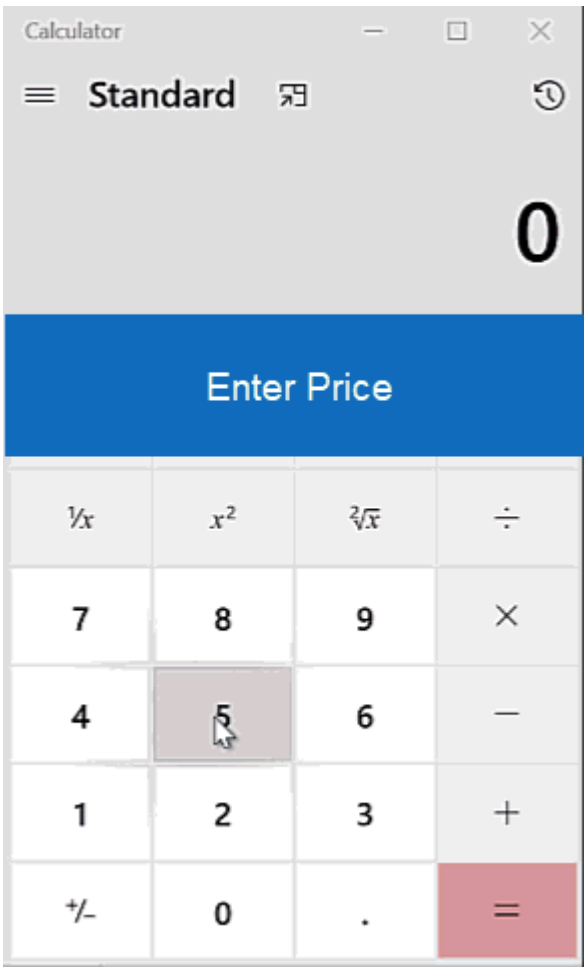
Add a Percentage to the Default Catalog Price

This option enables you increase the price by a percentage based off the default catalog price. With this option, you are working solely with catalog pricing, net cost is not involved at all.

For example, a product has a supplier catalog price (list price) of $5.00. If you enter 5 in the "Add % of to the Catalog Price" box, then 5% of the catalog price of $5.00 will be calculated and that amount will be added onto the default catalog price. In the example above, 5% of $5.00 is $.25; so the new price of the item will be $5.25.

When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Here is a demonstration of how to check the pricing adjustment using a calculator:



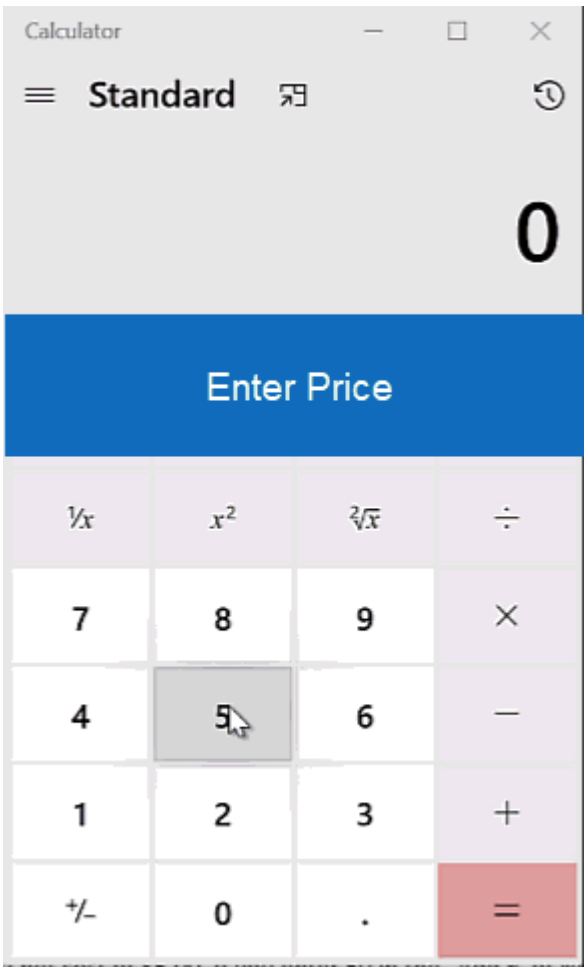
Subtract a Percentage to the Default Catalog Price

This option enables you decrease the price by a percentage based off the default catalog price. With this option, you are working solely with catalog pricing, net cost is not involved at all.

For example, a product has a supplier catalog price (list price) of $5.00. If you enter 5 in the "Subtract % from the Catalog Price" box, then 5% of the catalog price of $5.00 will be calculated and that amount will be subtracted from the default catalog price. In the example above, 5% of $5.00 is $.25; so the new price of the item will be $4.75.

When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Here is a demonstration of how to check the pricing adjustment using a calculator:



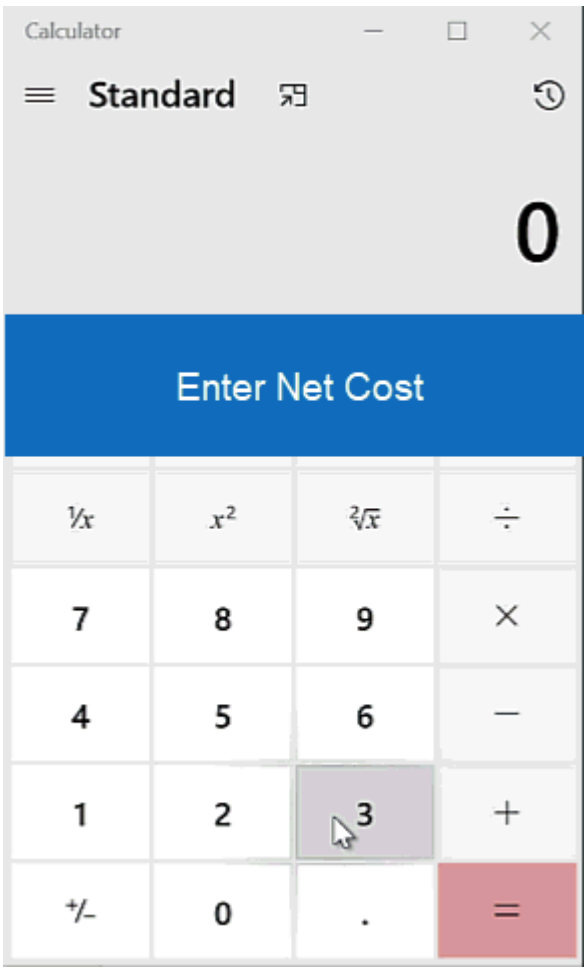
Add a Percentage of Net Cost to the Catalog Price

This option enables you increase the price by a percentage based off the net cost. With this option, you are using a percentage of the net cost and adding it to the catalog price.

For example, a product has a net cost of $3.00 and a default catalog price of $5.00. If you select the “Add Percentage of Net Cost to the Catalog Price” option and then enter 5 in the percentage box, then 5% of the net cost of $3.00 will be calculated and that amount will be added onto the default catalog price of $5.00. In the example above, 5% of $3.00 is $.25; so the new price of the item will be $5.25.

When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Here is a demonstration of how to check the pricing adjustment using a calculator:



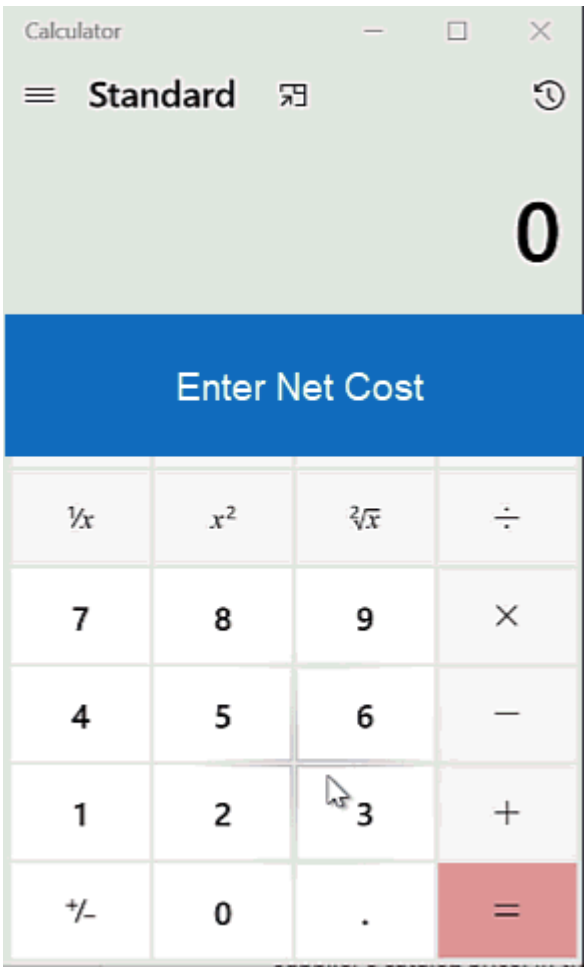
Add a Percentage of Net Cost to Net Cost as the Catalog Price

This option enables you increase replace the default catalog pricing by calculating a percentage of the net cost and then adding that percentage to the net cost. With this option, you are working solely with the net cost.

For example, a product has a net cost of $3.00. If you select the “Add Percentage of Net Cost to the Catalog Price” option and then enter 5 in the percentage box, then 5% of the net cost of $3.00 will be calculated and that amount will be added onto the net cost. In the example above, 5% of $3.00 is $.15; so by adding the $.15 to the net cost of $3.00, the new price of the item will be $3.15.

When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Here is a demonstration of how to check the pricing adjustment using a calculator:



Use a Profit Margin

This option enables you maintain a percentage between the net cost and catalog price.

For example, if a product has a net cost of $3 and the distributor wants to make a 50% profit, they will need to increase the list price to $6 so that they make 50% of the total sale. They charge $6 and then pay the supplier $3. The remaining $3 is their profit, which is 50% of the completed transaction.

It is important to note that this option will override the suggested profit margin and varying profit margins provided by the supplier. This means that if a product had five price breaks and different profit margins (for example, first quantity is 50%, remaining four quantities are 45%) and you have selected to have a profit margin of 40% applied to your site; all of the price breaks will now be a 40% discount.

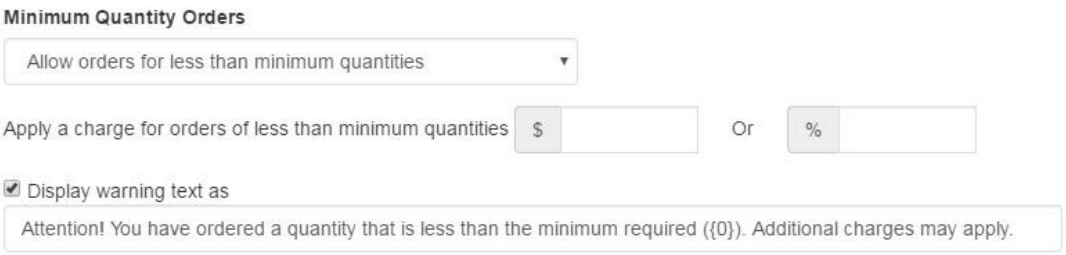
Please keep in mind that the maximum profit margin is 99.

When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

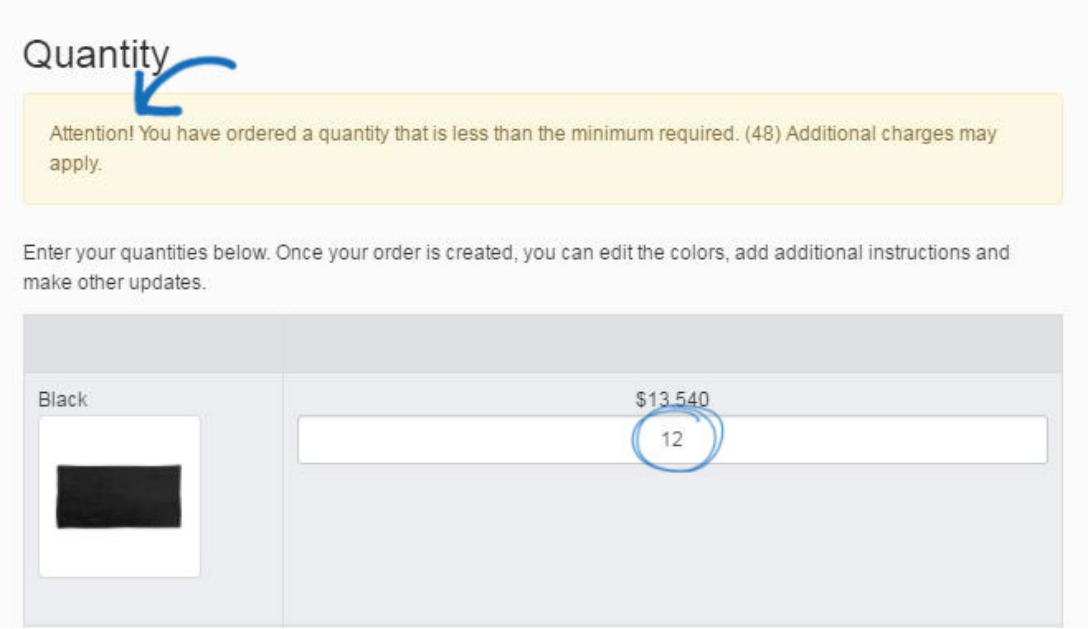
Flat Charges

The Flat Charges section enables you to establish a charge that is applicable to all products. Enter a dollar amount in the "per Product (Line item)" box and then type a name for the charge.

You are also able to control if customers are able to place orders with less than the minimum quantity. Use the dropdown to select to allow or not allow orders with less than minimum to proceed. If orders are allowed to with less than the minimum quantity, you are able to set a charge for these orders. Use the box with the dollar sign to add a fixed amount (such as $250) or use the box with the percent sign to have the charge calculated as a percentage of the total order.



If you would like a warning to appear when a customer is adding the product to their shopping cart and the quantity entered is less than the minimum, check the "Display warning text as" option and use the default message provide, or type a custom one. When a product is added to the shopping cart, a pop-up window called the Product Option Assistant will open. This window contains the product information and the user can enter a quantity and select additional criteria regarding options for the item prior to checking out. The charge you create in the Pricing Options and Display area will appear above the quantity in the Product Option Assistant.

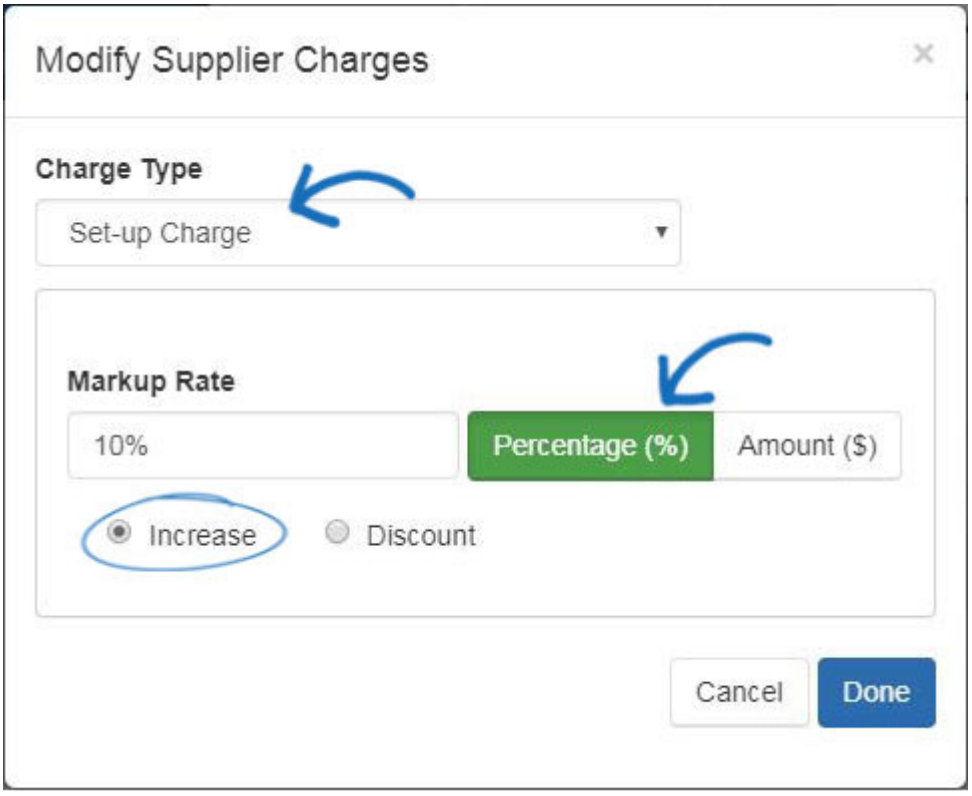


When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Markups

Within this section, you can control and modify the supplier charges shown on your site using Markups. In the Markups section, click on the Add Charge Type link.

Select the charge type from the dropdown and modify the rate. You can increase or decrease the supplier provided charge by a percentage or an amount. In the example below, supplier provided set-up charges have been increased by 10%. Click on Done when you are finished.



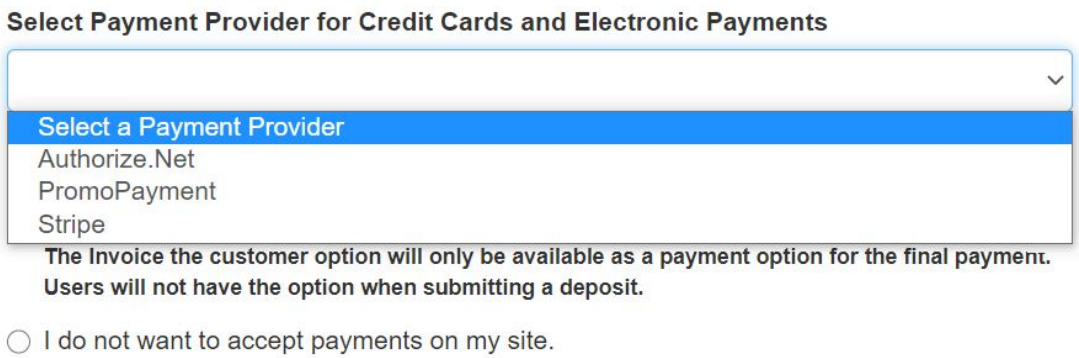
When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Payment Methods

If you would like to accept credit card and e-check payments you must have a PromoPayment , Authorize.net, or Stripe account. To sign-up for PromoPayment, click on the "Enroll Today" banner in the Payment Processing Center and create a PromoPayment account.

The Payment Processing Options enable you to begin accepting credit card payments by selecting a payment provider from the dropdown and selecting the "I Want to Accept Payments on My Site" option. Then, check the "Credit Card" and "Electronic Payment" boxes.

For added security, there is also an option to enable a reCAPTCHA during the check-out process. For more information on this, please expand the Check-Out and Order Management section below.



Note: PayPal will not function properly if you frame (iframe) your website.

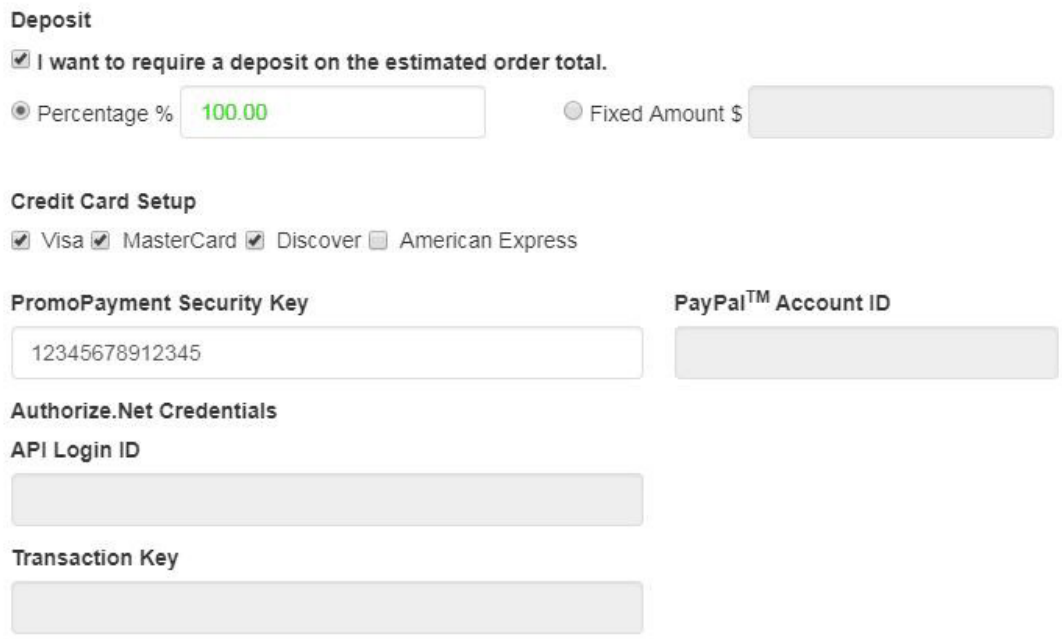
If you would like to use PayPal as the payment processor for your site, please take the following steps:

1. Leave the dropdown set to "Select A Payment Provider"
2. Choose "I want to accept payments on my site" and select PayPal
3. You must enable a deposit. You have control over the percentage or fixed amount, but the recommended percentage is 100
4. Enter your PayPal Account ID (email address for your PayPal account)

If you would like to use Invoice Me to enable your customers to receive an invoice, check the final box. It is important to also check the box under "Request Final Payment" and strongly recommended that the amount for deposit should be set to 100%

After selecting the payment provider from the available options, enable deposits and add a dollar amount or percentage in the deposit field.

Next, check all credit cards that you will accept on your site. Lastly, enter the credentials for the payment processor you selected, for example, your PromoPayment Security Key, Authorize.net credentials, or Stripe Publish Key and Secret Key.



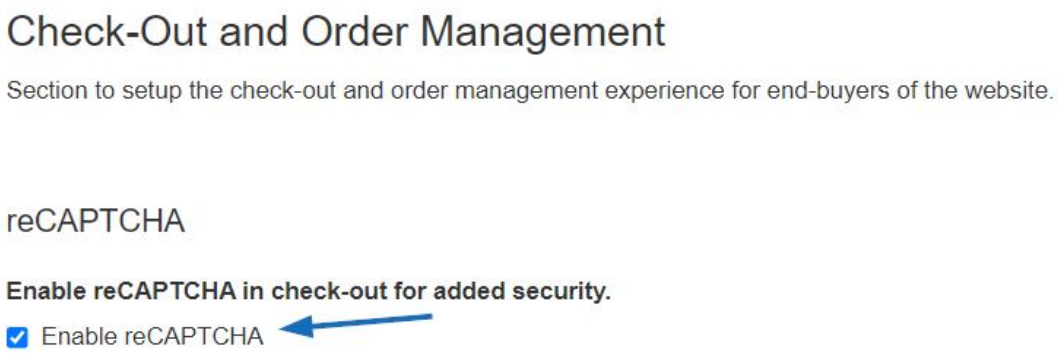
When you are finished making changes , click on the Save button and then click on the Make Changes Live link.

Check-Out and Order Management

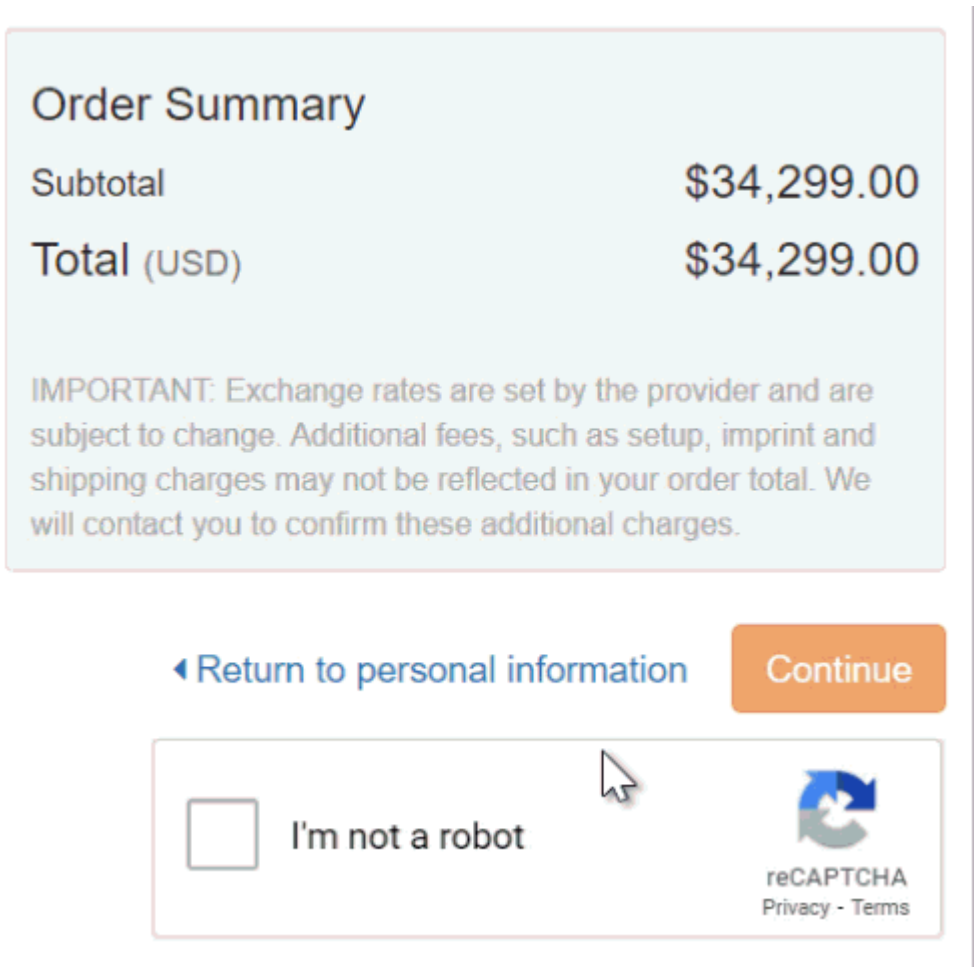
In this section, you can set your order display options, choose to accept coupons and company points, add shipping options and sales tax, and set order management defaults.

reCAPTCHA

To enable a reCAPTCHA during the check-out process, click the checkbox to enable the reCAPTCHA. Be sure to click on the Save button and then click on the Make Changes Live link.

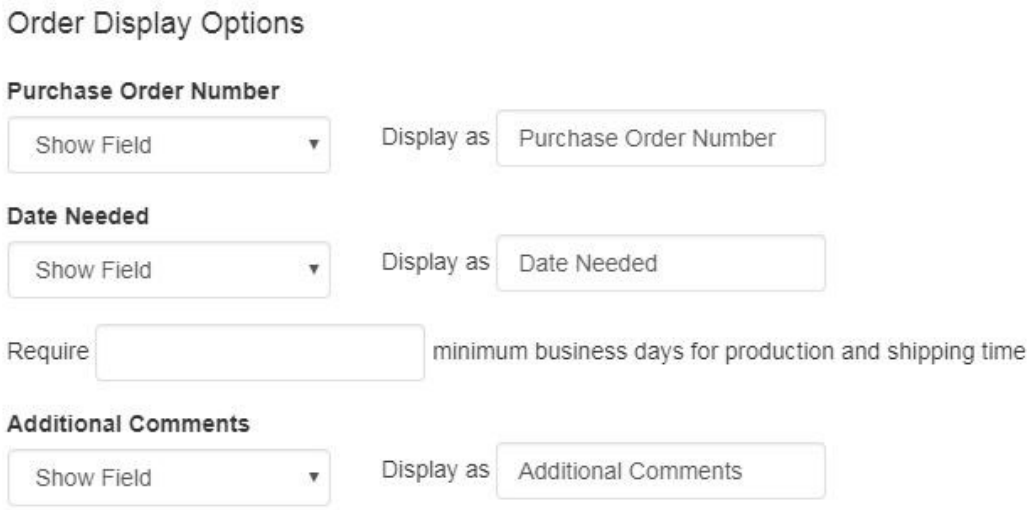


After the reCAPTCHA option has been enabled and made live on your site, customers will need to check the box before they are able to submit an order.



Order Display Options

The Order Display Options area enables you to select the fields to display during the checkout process, such as purchase order number, date needed, minimum required days, and additional comments.



Other Charge Options

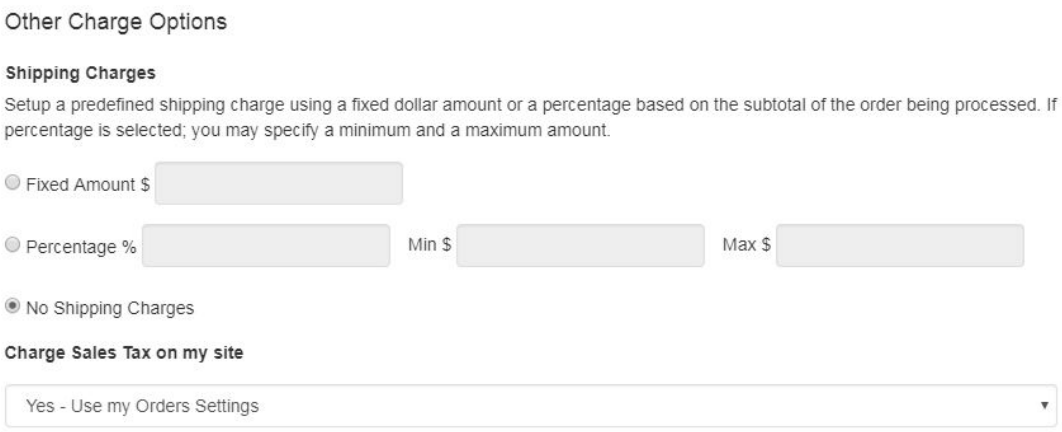
In the Other Charge Options section, you can set shipping charges and sales tax to be applied at checkout.

To enable your shipping charges, select from:

- Fixed Amount (flat rate)
- Percentage
- No Shipping Charges

Then, enter the value in the respective box.

If you are entering a percentage, the Min and Max are the shipping amount which will be applied.



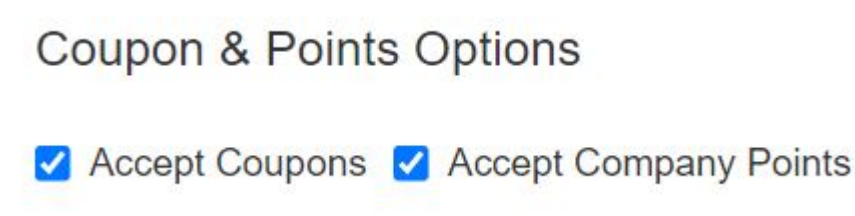
To set up a tax code, use the dropdown to make your selection. The dropdown will link into your CRM Tax Rates, so you will want to consult your CRM Admin. If you do not wish to use a sales tax rate, use the dropdown to select No Tax Rate.

When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Coupon & Company Points

The Coupon & Points Options in the eCommerce section enable you to enable coupons, establish company points and manage supplier specials.

To enable Coupons and Company Points, check the corresponding checkbox.



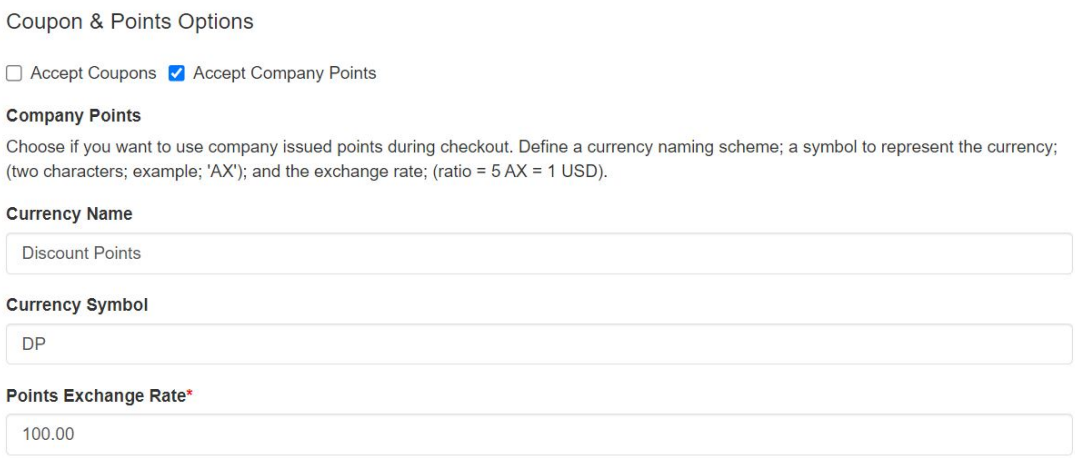
To create and manage coupons, go to Global Features and click on Coupon Manager.

When setting up company points:

- Type a currency name, such as "Discount Points".
- Add a currency symbol, to represent your currency. The currency symbol should be a two letter abbreviation such as "DP".

- Set the points exchange rate, meaning the amount of points that will equal one (1) US dollar. As an example, if you type 100 in the points exchange rate box, the customer will receive a one dollar discount from their order total for every 100 points they entered on your site.

If you have a company points system in use on a company store, users must have an account balance in order to be able to view and apply their points during checkout.

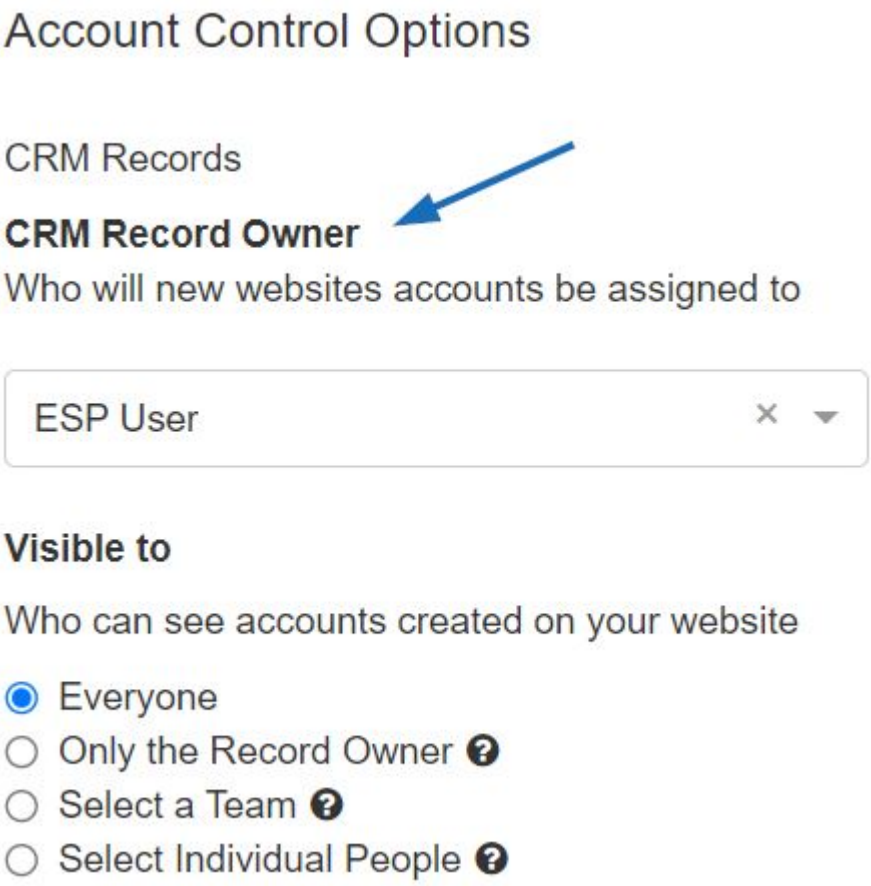


When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Account Control Options

The Account Control Options are the defaults for when orders are placed on your site. Use the CRM Record Owner dropdown to select which representative will be assigned to new accounts that are created on the site.

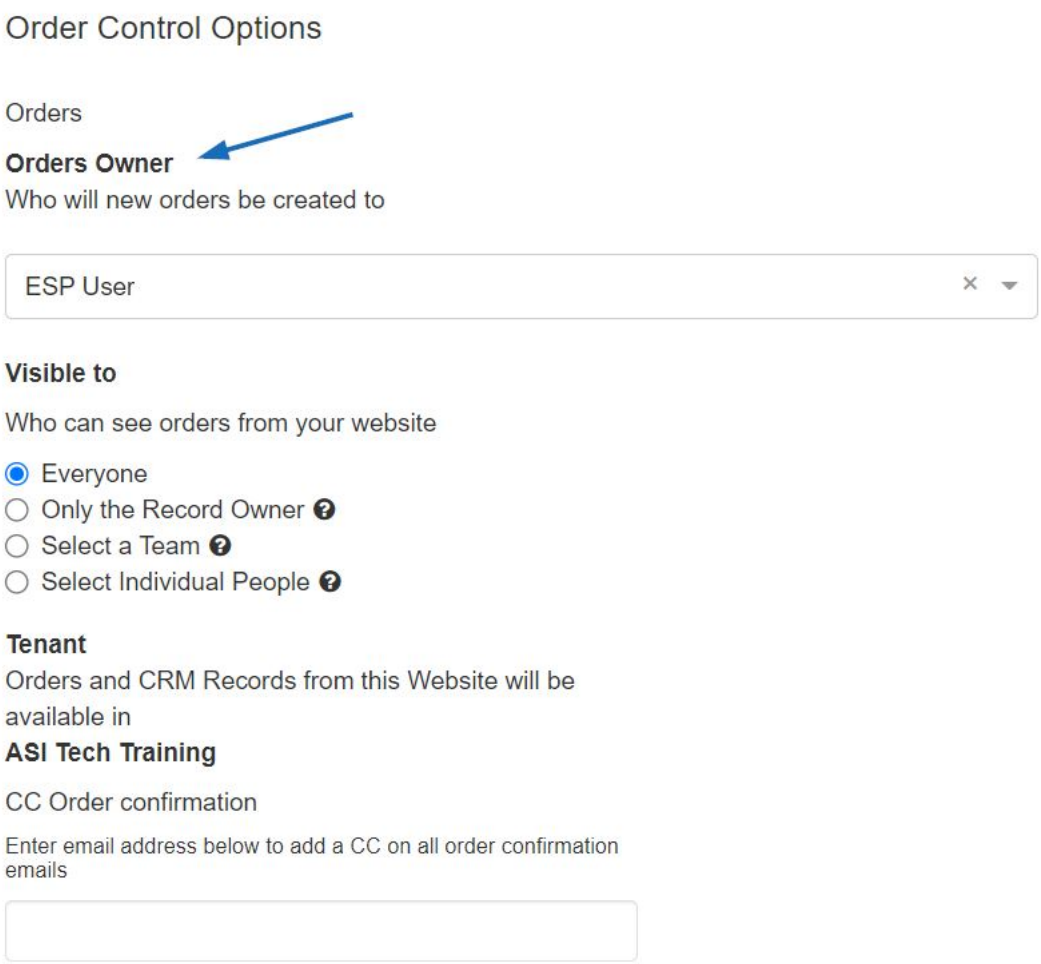
Then, use the Visible To options to select which users within your company should be able to view the accounts created on the site.



When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Order Control Options

The Order Control Options enable you to use the dropdown to select which representative will be the owner of new orders placed on the website. Below the dropdown, you can use the Visible To options to select who can see orders from the website in ESP Orders.

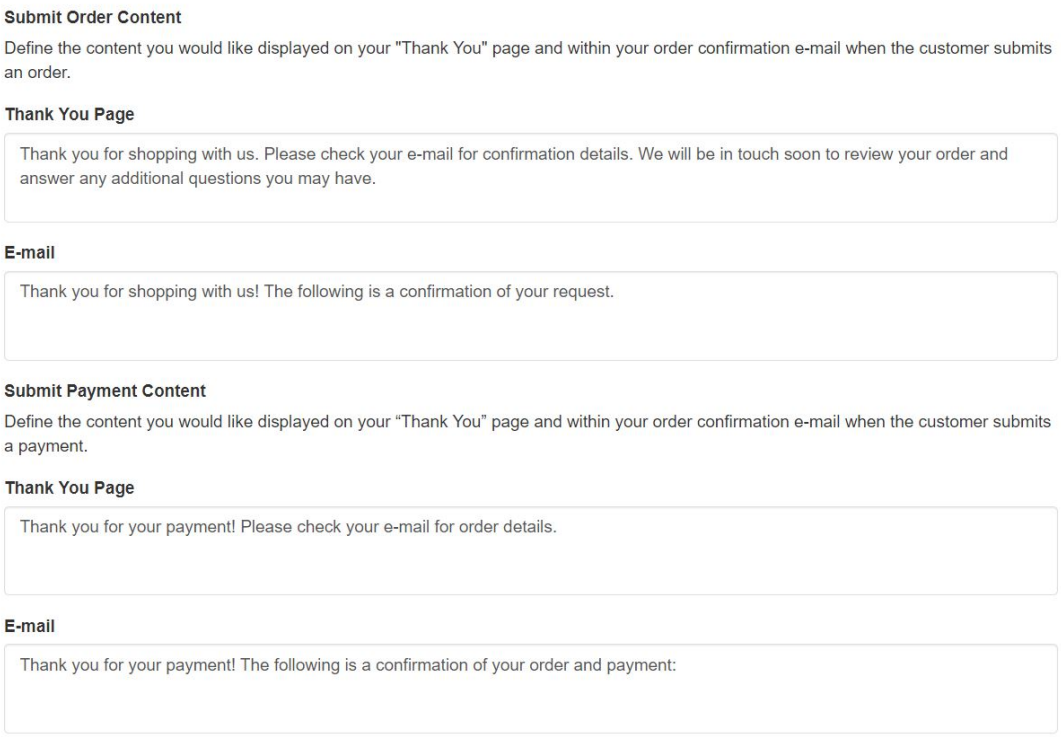


When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Submit Order Content and Submit Payment Content

After an order is submitted on your site, a thank you page will display. You can edit the text of the thank you page, as well as the text of the outgoing order confirmation email. Also, when the customer submits a payment on your site, a thank you page will display and a confirmation email will be sent. You can use the Thank You Page and E-mail boxes to customize the text.

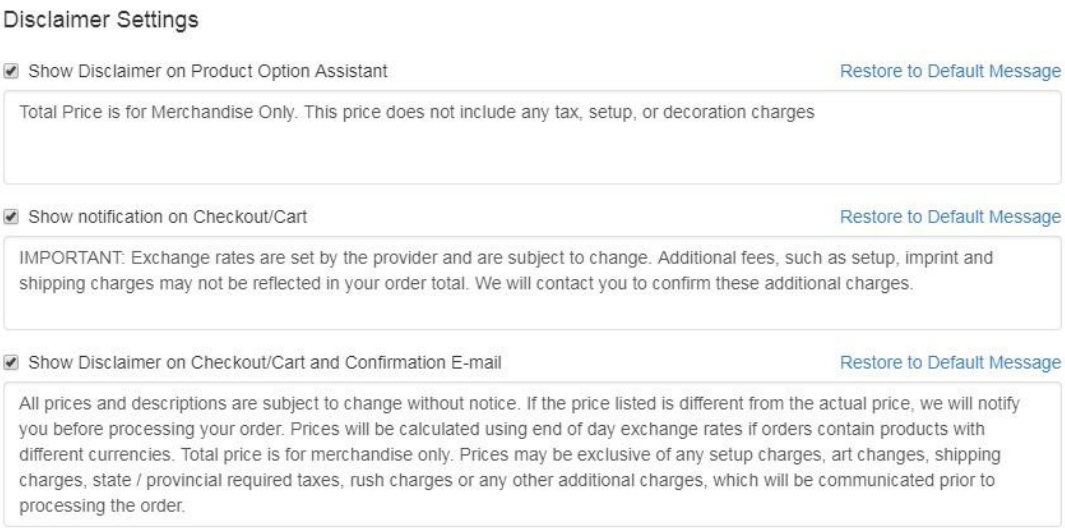
Note: Your ESP Website will automatically have standard, default text available in these fields.



When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Disclaimer Settings

When customers are adding a product to the shopping cart or checking out, the Product Option Assistant enables customers to enter specifics about the item, such as colors, sizes and quantities. You are able to include custom disclaimer text on the Product Option Assistant, as well as on the Checkout screen and in the Order Confirmation E-mail.



When you are finished making changes, click on the Save button and then click on the Make Changes Live link.

Artwork Options

The Artwork Options enable you to choose whether to accept art files sent through the site.

- The "Use uploaded artwork" option would enable customers to import their logo to the order.
- The "Use approved artwork" option would only allow logos that are currently uploaded to your site to be used.

Selecting one or both of these options will create a notification message reminding customers to scroll down to upload or select the artwork. If neither option is selected, no message will be shown during check-out.

When you are finished making changes, click on the Save button and then click on the Make Changes Live link.