



eCommerce

Jennifer S - 2021-11-12 - 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.

Currency And Pricing Display

Section to setup display of prices on the website.

My Preferred Currency is:

US Dollar (USD) ▼

- Show Products with US pricing
- Show Products with Canadian pricing
- Show All Products

Use an exchange rate of

1 Canadian Dollar (CAD) to US Dollar (USD)

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

Show supplier's Catalog Price (default)

Do not show product pricing on my website NOT RECOMMENDED: Price will show as QUR (Quote Upon Request)

Show pricing codes? Yes No

Hides prices for products with pricing not confirmed this year? Yes No

Maximum decimal places on my product pricing:

Show default decimal places set by supplier If you choose to show less decimal places than the supplier, the price will be rounded up to the nearest place.

Change max decimal places on pricing (2 or 3)(e.g. 1.211 will become 1.22 if you choose 2 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.

Change Price Label

Price (Catalog Price: Default caption "Price")

Savings (Savings between Catalog Price and any adjustments you've made to reduce cost only: Default caption: "Savings")

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.

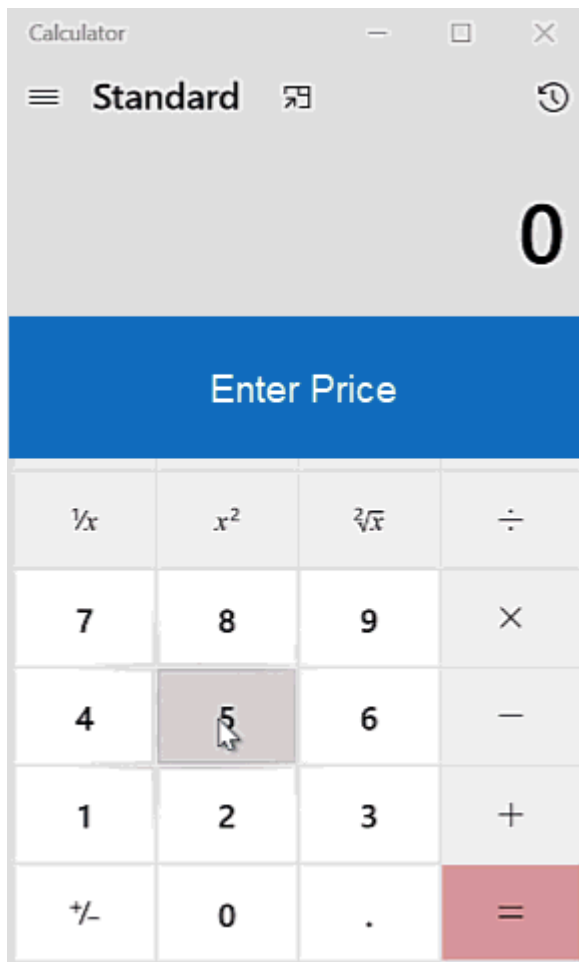
Add a Percentage to the Default Catalog Price

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:



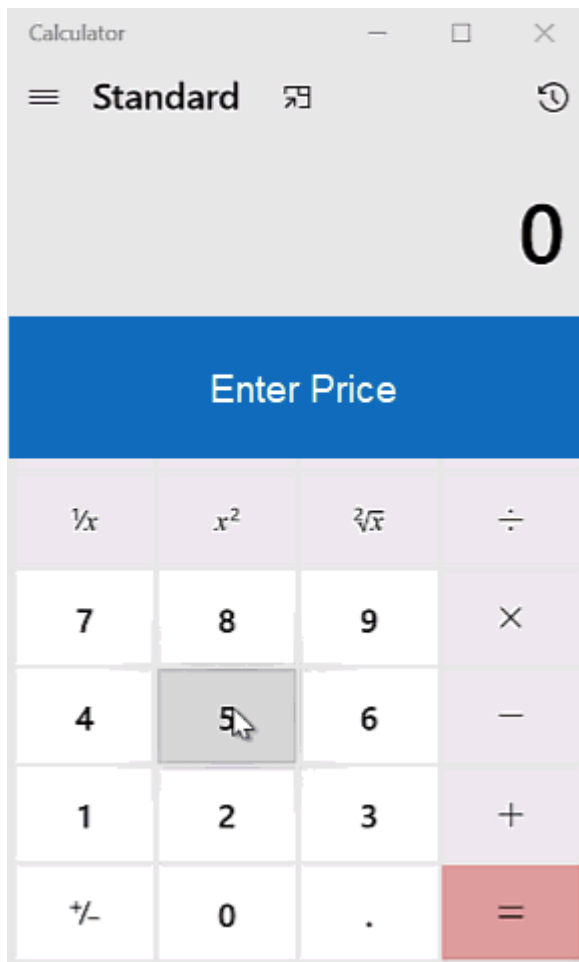
Subtract a Percentage to the Default Catalog Price

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:



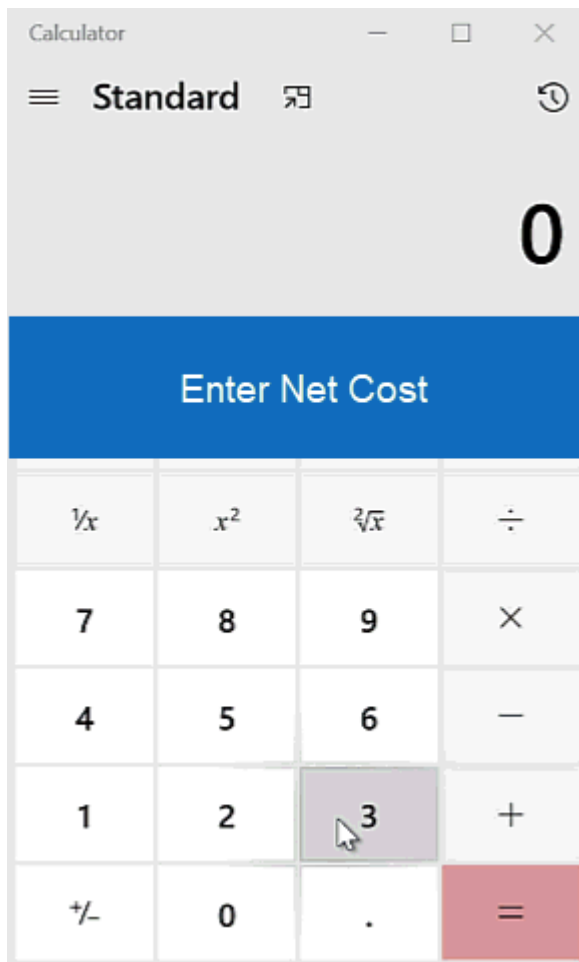
Add a Percentage of Net Cost to the Catalog Price

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:



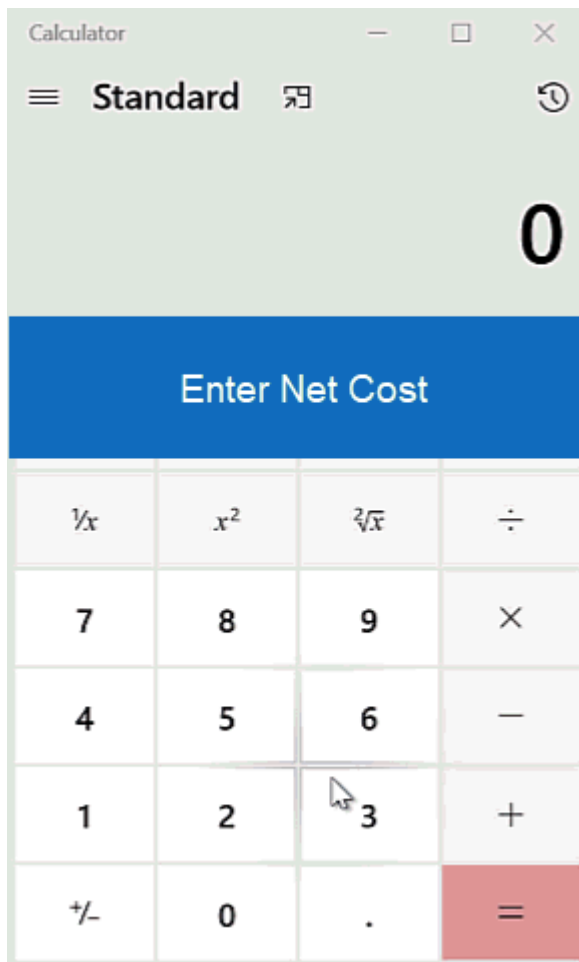
Add a Percentage of Net Cost to Net Cost as the Catalog Price

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.

Flat Charges

Apply setup charge

per Product (Line item)

Name

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.

Minimum Quantity Orders

Apply a charge for orders of less than minimum quantities

Or


Display warning text as

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.

Quantity

Attention! You have ordered a quantity that is less than the minimum required. (48) Additional charges may apply.

Enter your quantities below. Once your order is created, you can edit the colors, add additional instructions and make other updates.

Black	\$13,540
	<input type="text" value="12"/>

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.

Modified Supplier Charges

Charge Type ^ Markup Rate ^

[+ Add Charge Type](#)

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.

Modify Supplier Charges ×

Charge Type

Set-up Charge

Markup Rate

10%

Percentage (%) Amount (\$)

Increase Discount

Cancel Done

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.

Select Payment Provider for Credit Cards and Electronic Payments

A screenshot of a web form's dropdown menu. The dropdown is titled "Select a Payment Provider" and is currently open, showing four options: "Select a Payment Provider" (highlighted in blue), "Authorize.Net", "PromoPayment", and "Stripe".

The Invoice the customer option will only be available as a payment option for the final payment. Users will not have the option when submitting a deposit.

I do not want to accept payments on my site.

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.

Deposit

I want to require a deposit on the estimated order total.

Percentage % Fixed Amount \$

Credit Card Setup

Visa MasterCard Discover American Express

PromoPayment Security Key

PayPal™ Account ID

Authorize.Net Credentials

API Login ID

Transaction 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.

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.

Order Display Options

Purchase Order Number

▼ Display as

Date Needed

▼ Display as

Require minimum business days for production and shipping time

Additional Comments

▼ Display as

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.

Other Charge Options

Shipping Charges

Setup a predefined shipping charge using a fixed dollar amount or a percentage based on the subtotal of the order being processed. If percentage is selected; you may specify a minimum and a maximum amount.

Fixed Amount \$

Percentage % Min \$ Max \$

No Shipping Charges

Charge Sales Tax on my site

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.

Coupon & Points Options

Accept Coupons Accept Company Points

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.

Coupon & Points Options

Accept Coupons Accept Company Points

Company Points

Choose if you want to use company issued points during checkout. Define a currency naming scheme; a symbol to represent the currency; (two characters; example; 'AX'); and the exchange rate; (ratio = 5 AX = 1 USD).

Currency Name

Currency Symbol

Points Exchange Rate*

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.

Account Control Options

CRM Records

CRM Record Owner



Who will new websites accounts be assigned to

 ✕ ▼

Visible to

Who can see accounts created on your website

- Everyone
- Only the Record Owner ?
- Select a Team ?
- Select Individual People ?

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.

Order Control Options

Orders

Orders Owner

Who will new orders be created to

ESP User



Visible to

Who can see orders from your website

- Everyone
- Only the Record Owner ?
- Select a Team ?
- Select Individual People ?

Tenant

Orders and CRM Records from this Website will be available in

ASI Tech Training

CC Order confirmation

Enter email address below to add a CC on all order confirmation emails

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.

Submit Order Content

Define the content you would like displayed on your "Thank You" page and within your order confirmation e-mail when the customer submits an order.

Thank You Page

Thank you for shopping with us. Please check your e-mail for confirmation details. We will be in touch soon to review your order and answer any additional questions you may have.

E-mail

Thank you for shopping with us! The following is a confirmation of your request.

Submit Payment Content

Define the content you would like displayed on your "Thank You" page and within your order confirmation e-mail when the customer submits a payment.

Thank You Page

Thank you for your payment! Please check your e-mail for order details.

E-mail

Thank you for your payment! The following is a confirmation of your order and payment:

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.

Disclaimer Settings

Show Disclaimer on Product Option Assistant

[Restore to Default Message](#)

Total Price is for Merchandise Only. This price does not include any tax, setup, or decoration charges

Show notification on Checkout/Cart

[Restore to Default Message](#)

IMPORTANT: Exchange rates are set by the provider and are subject to change. Additional fees, such as setup, imprint and shipping charges may not be reflected in your order total. We will contact you to confirm these additional charges.

Show Disclaimer on Checkout/Cart and Confirmation E-mail

[Restore to Default Message](#)

All prices and descriptions are subject to change without notice. If the price listed is different from the actual price, we will notify you before processing your order. Prices will be calculated using end of day exchange rates if orders contain products with different currencies. Total price is for merchandise only. Prices may be exclusive of any setup charges, art changes, shipping charges, state / provincial required taxes, rush charges or any other additional charges, which will be communicated prior to processing the order.

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.