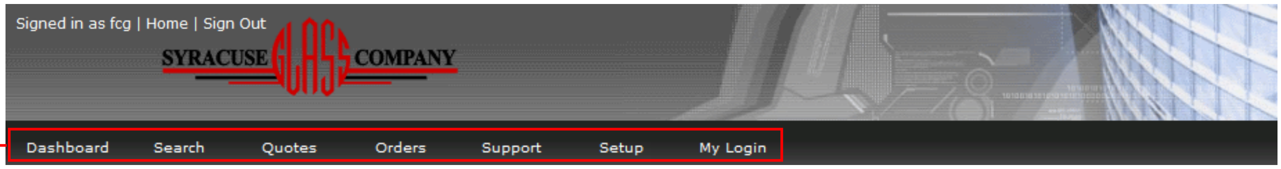
Setup

There are several required and optional features to be setup before using Web Center.

The top portion of the Dashboard contains navigation menus and links described below:



The above navigation menu includes the following items:

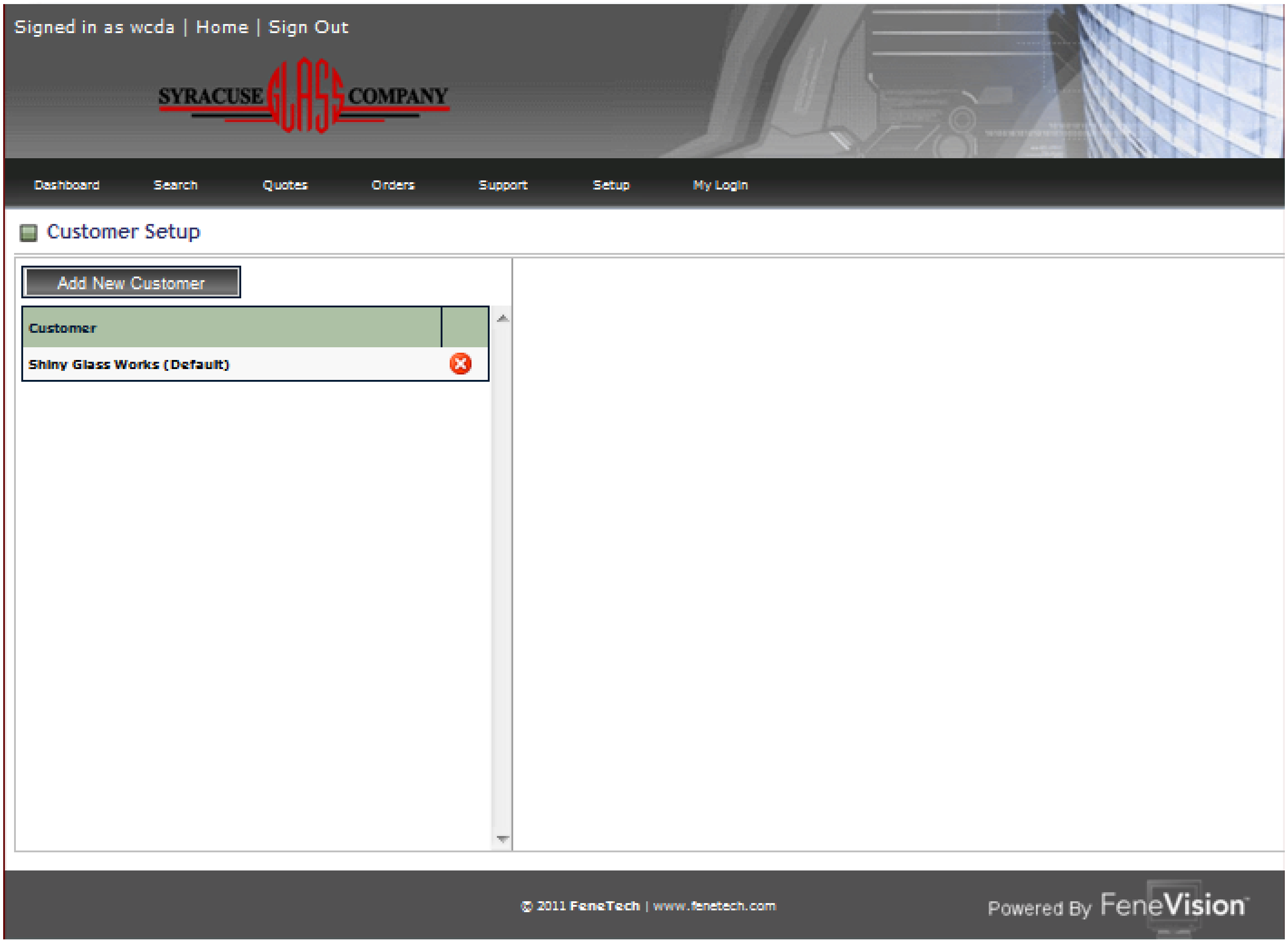
Dashboard – Landing page for Web Center.
Search – Displays the Search Screen.
Quotes – Directs the user to a menu of links: Quote Entry and Quote Maintenance.
Orders – Directs the user to a menu of links: Order History and Purchase History.
Support – Display a menu containing a link to Files. *(Set-up required)*
Setup – Directs the user to a menu of links to setup the application.
My Login – The user can enter their name and change their password.

The setup menu contains links to setup a customer base, payment terms, shipping methods, pricing table and company information. This section will explain the setup menu options.

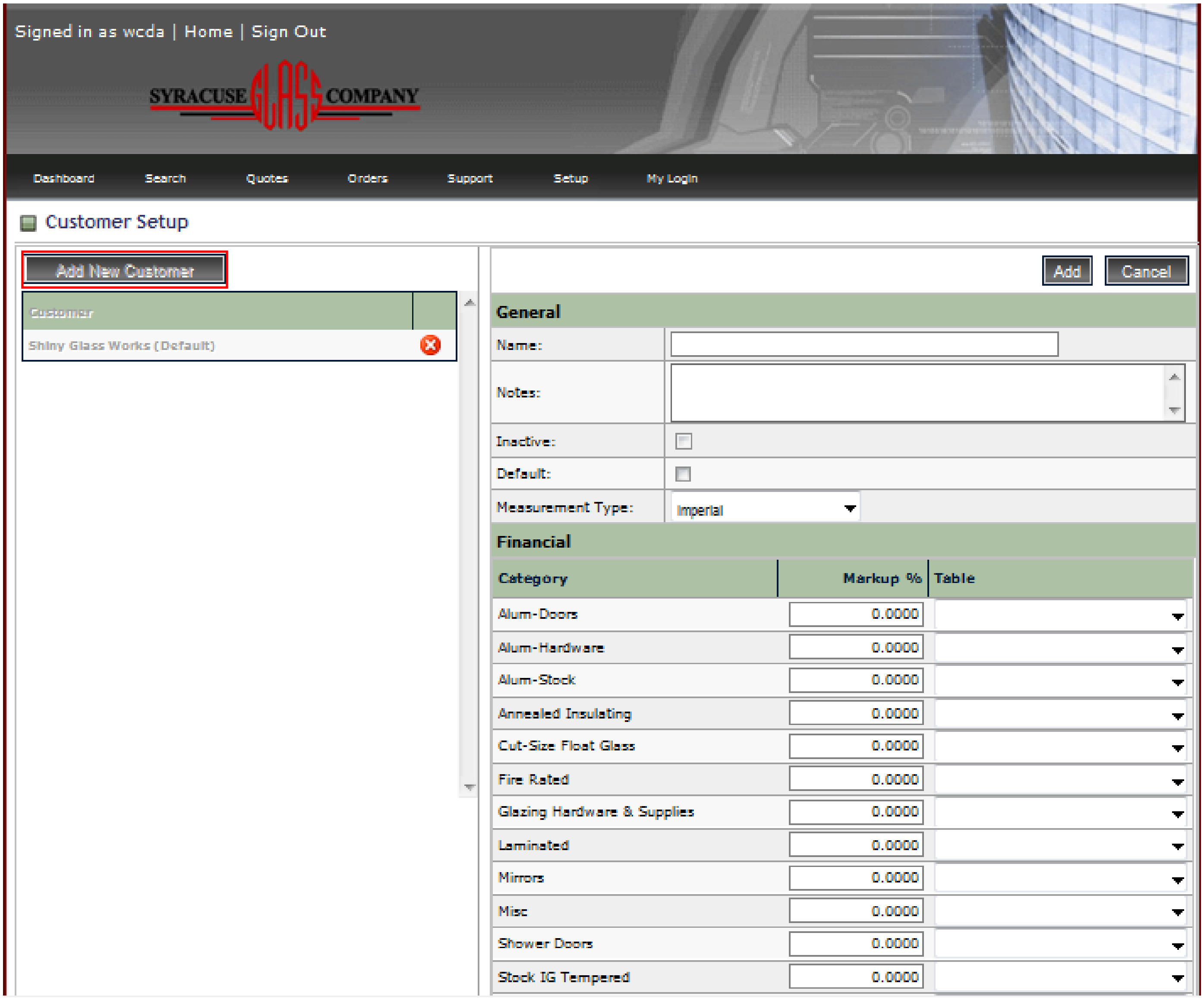
Customer

A customer must be setup in the application prior to an order being entered for the customer. To setup an account complete the following:

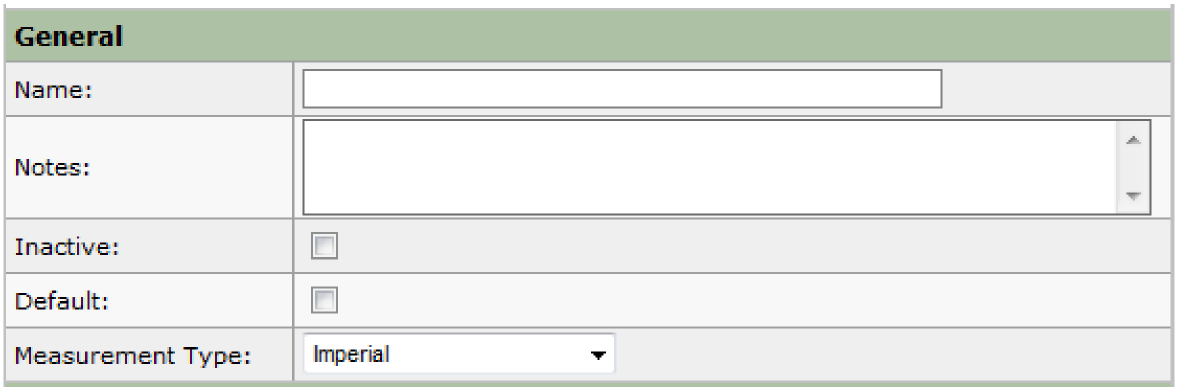
1. Click Setup → Customers. The left side of the screen is where customers are added. The right side of the screen lists customer details for the selected customer.



2. Click the "Add New Customer" button, producing a new template for adding customer information, as shown below.



3. Enter the customer information under the General Section.



The General Section consists of the following:

Name – Customer's name *(Required)*

Notes –Notes regarding the customer. Notes are for internal use only, and do not show up on any reports. *(Optional)*

Inactive – Enables an inactive status for the customer. Quotes can not be added for inactive customers.

Default – Default customer information used to pre-populate information when adding new customers. Only one default customer can be set up.

Measurement Type – Default measurement type.

4. Enter information into the Financial Section.

Financial		
Category	**Markup %**	**Table**
Alum-Doors	50.0000	
Alum-Hardware	50.0000	
Alum-Stock	40.0000	
Annealed Insulating	40.0000	
Cut-Size Float Glass	30.0000	
Fire Rated	50.0000	
Glazing Hardware & Supplies	25.0000	
Laminated	30.0000	

Pricing Method:	Markup From Cost		
Terms:	Net30		
Salesperson:	Snyder, Emily		
Tax Percent:	10.0000 %	Tax Title:	state tax
Tax Percent 1:	0.0000 %	Tax Title 1:	

The user can enter information into the following fields:

Categories - Pre-assigned by the manufacturer. Categories contain their own orderable parts and discount tables. *(Optional)*

Markup / Margin / Discount - Each product category can have a markup (percent or multiplier based upon manufacturer settings), margin or discount (percent or multiplier based upon manufacturer settings), depending on the pricing method specified for the customer. The price to the end customer will apply the specified value to the part and each option if a table isn't defined. If a table is defined, this value will be used for the part given no value is defined in the table for the part, and the value will be used for all options that have no value defined in the table.

Table – Each product category can have a Markup / Margin / Discount table, depending on the Pricing Method specified for the customer. *(Optional)*

Pricing Method - Customer pricing calculation method. The user must select one of these three options from the dropdown list: *(Required)*

- Markup from Cost
- Discount from List
- Gross Margin

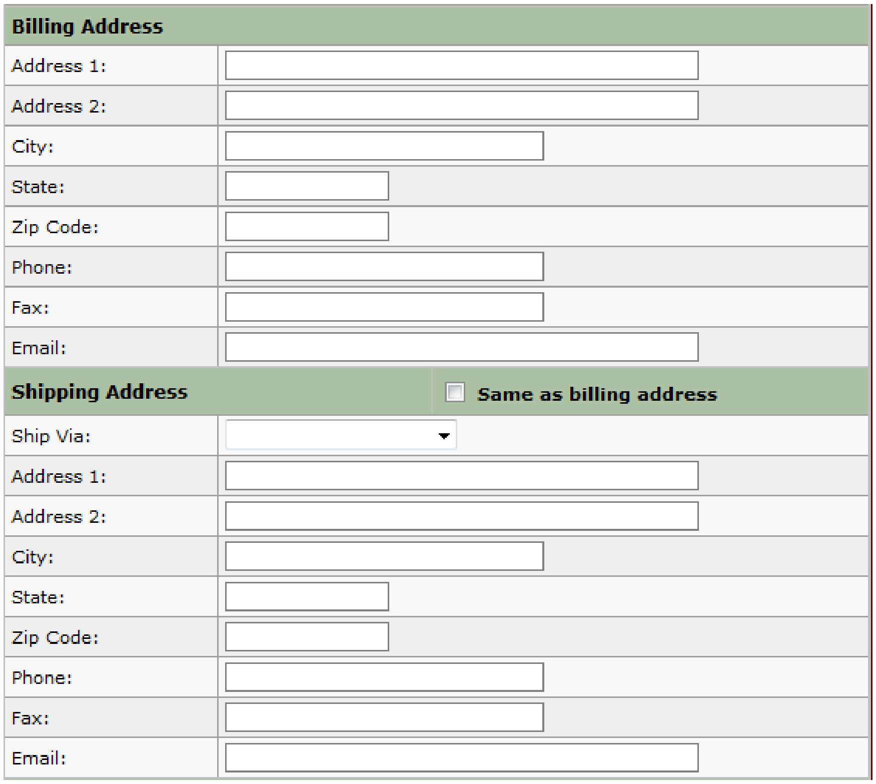
Terms – Default payment terms selected via the Terms dropdown list. *(Optional)*

Salesperson – Identifies the default salesperson for the customer through the dropdown list. *(Optional)*

Tax Percent – Customer tax rates. *(Optional)*

Tax Title – The title for each tax rate. *(Optional)*

5. Enter address information into the Billing Address and Shipping Address Sections.



In the billing address section, the user can enter the billing information for the new customer. If the shipping address is the same as the billing, click the “Same as billing address” checkbox which will become read-only.

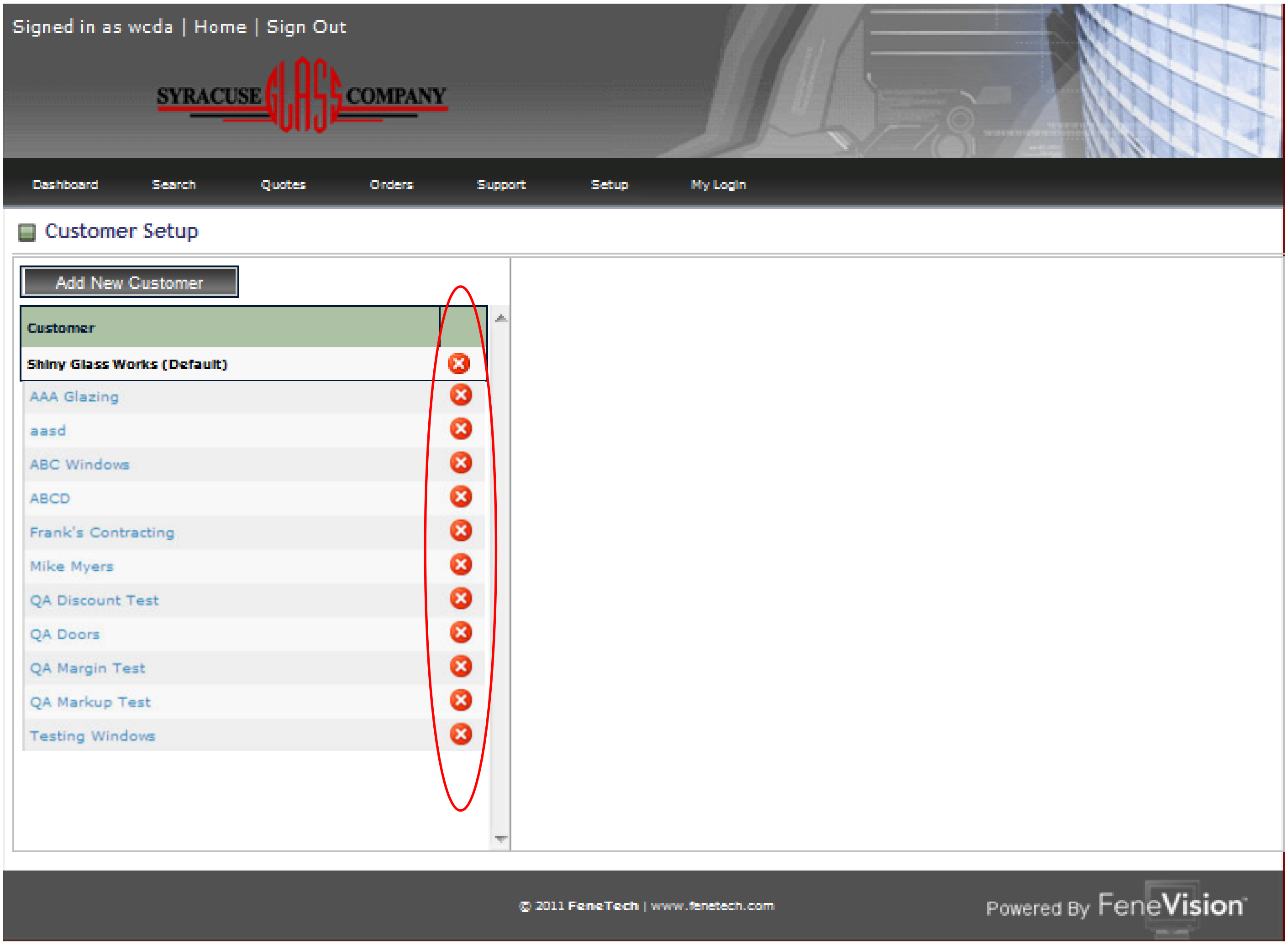
6. Whether the “Same as billing address” checkbox is selected or not, the Ship Via will not be read-only. Click on the apppropriate method using the Ship Via dropdown list.

7. Click the “Add” button. The customer will be added to the list on the left side of the Customer Setup Screen. If the user does not want to add the customer, click the “Cancel” button. The customer will not be added to the customer list.

To delete a customer from the existing customer list, complete the following:

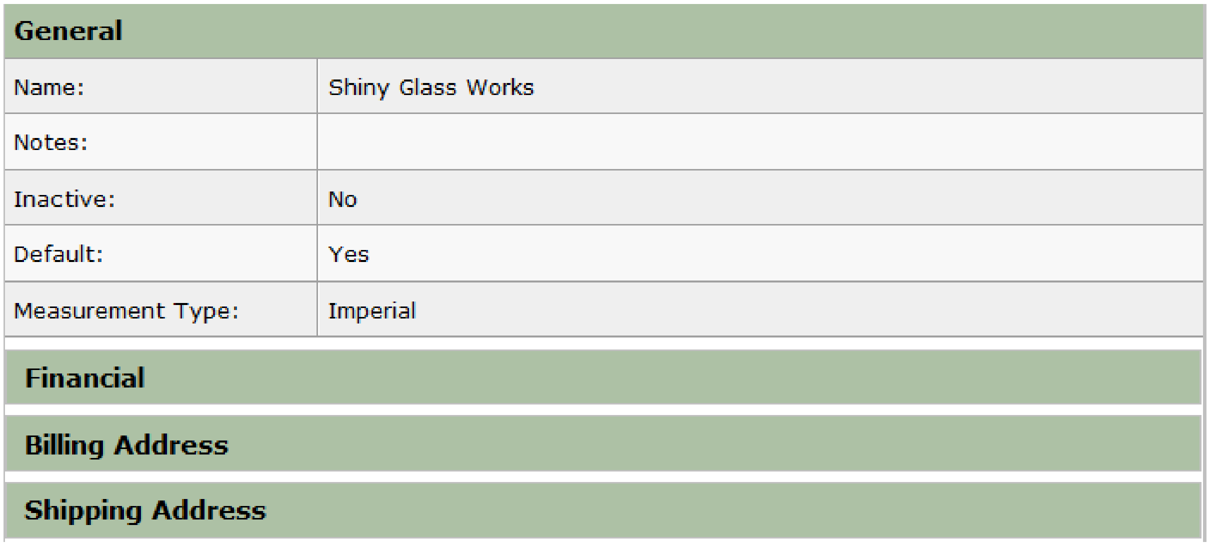
1. Find the customer to be deleted in the list on the left side of the customer setup screen.

2. Click the  button next to the customer.



To edit a customer, complete the following:

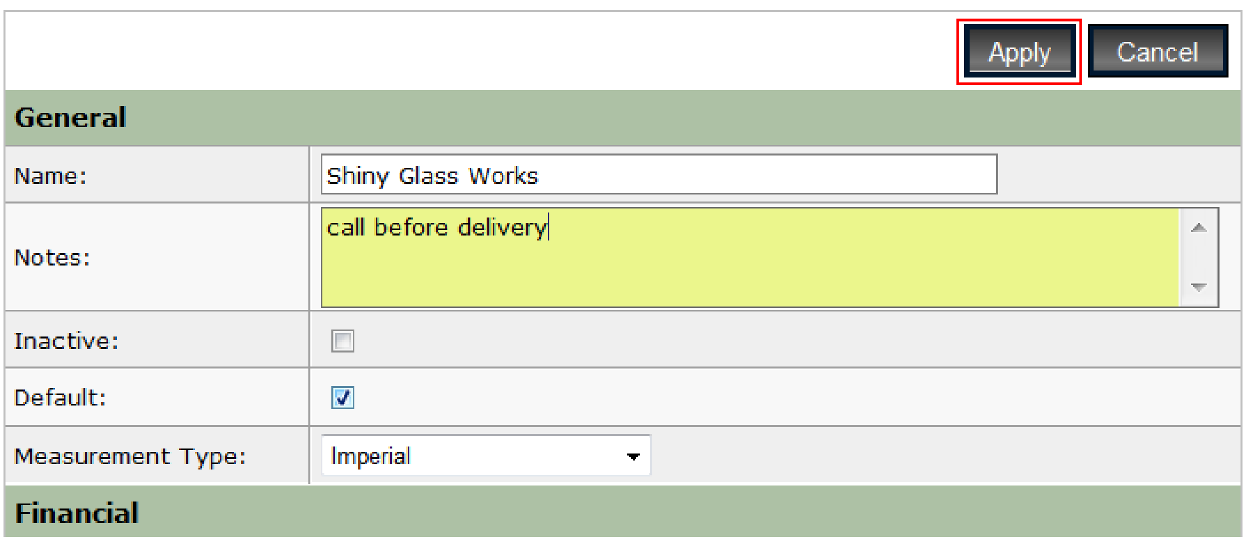
1. Click on the customer in the customer list on the left side of the screen and the following screen will display on the right.



2. Click the "Edit" button. 

3. Make all necessary changes.

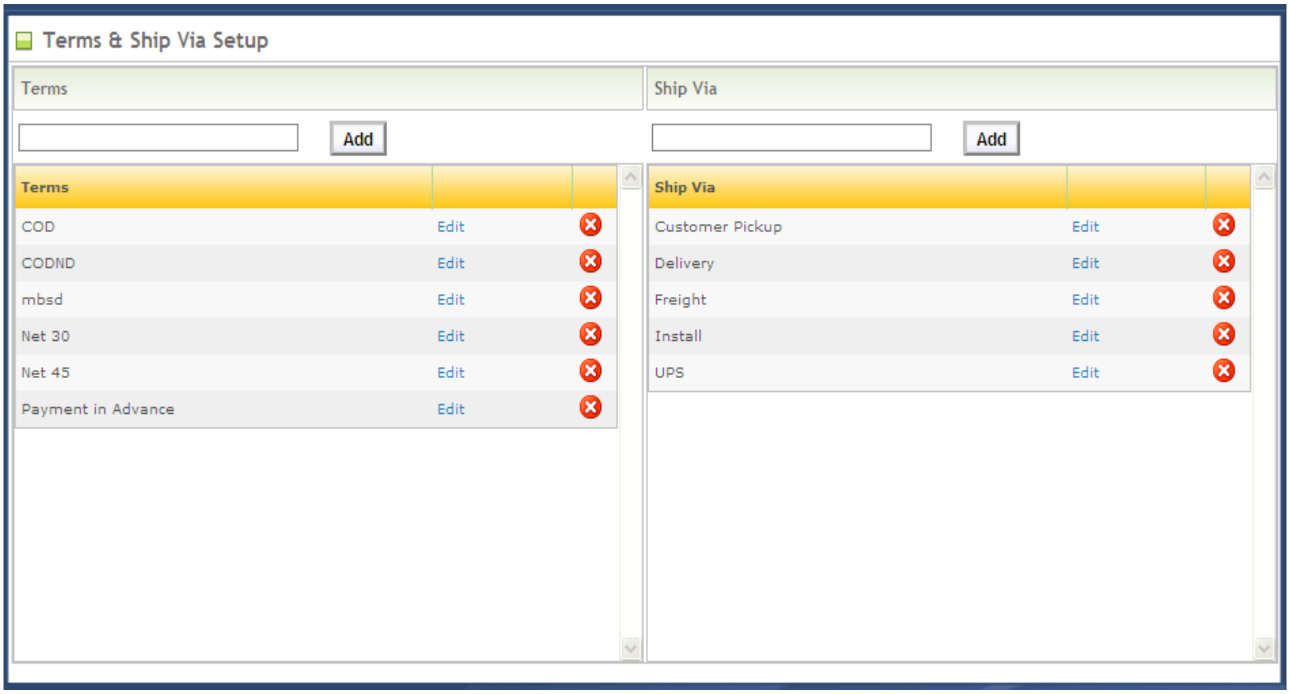
4. Click the "Apply" button to save the changes or the "Cancel" button to cancel the changes.



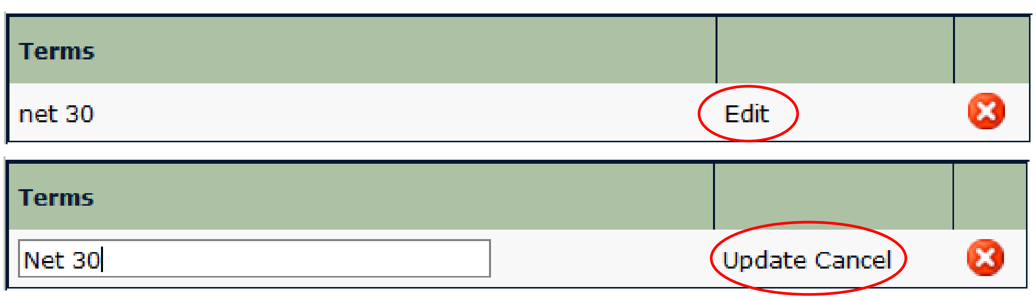
Terms & Ship Via

To add payment terms and shipping methods, complete the following:

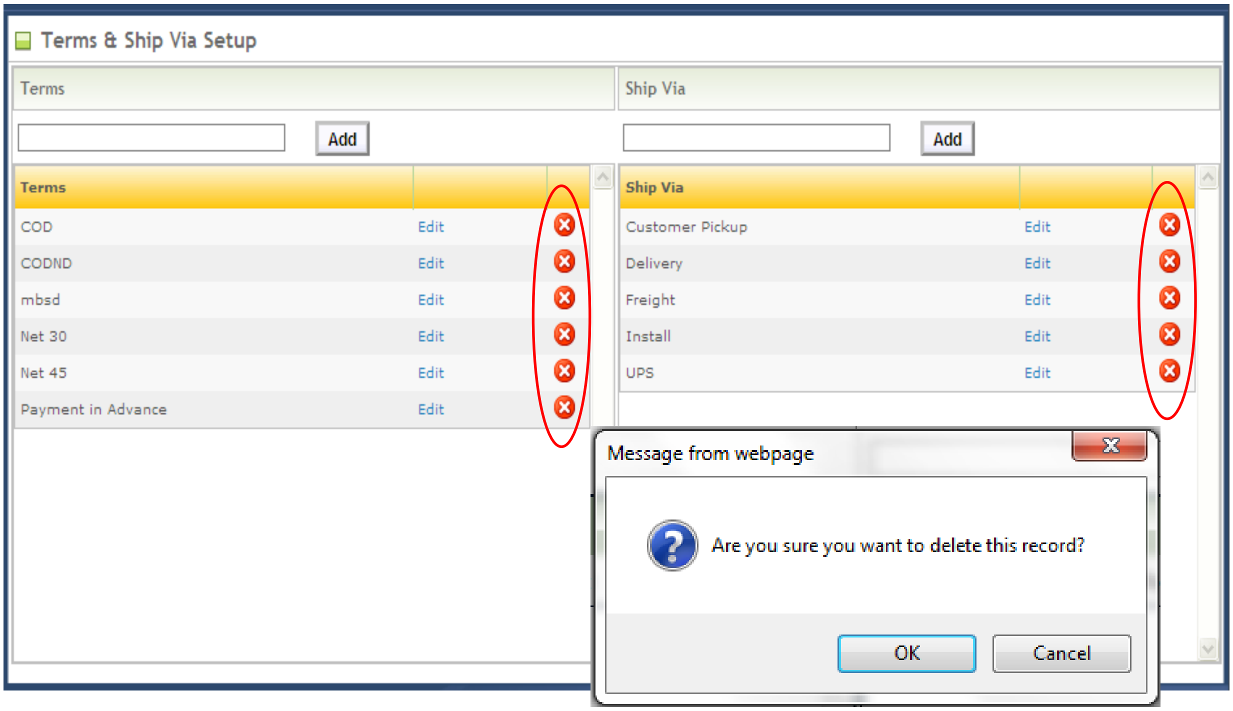
1. Click on Setup → Terms & Ship Via. On the left side, the user can add, edit, or delete terms. On the right side, the user can add, edit, or delete the ship via records.



2. In the field under the Terms section, enter the name.
3. Click the “Add” button. These can now be used in order entry or customer setup.
4. Click on the “Edit” button next to the appropriate Term or Shipping Method to edit them.
5. Rename the value.
6. Click on the “Update” button to save or the “Cancel” button to cancel changes.



7. Click the  button next to the appropriate value to delete a Term or Shipping Method. The user will be prompted to validate the deletion.



Pricing

Below are the three types of pricing methods a price table can be setup with:

- **Discount from List** - Reduction from manufacturer's list price. For example, if the manufacturer list price for a window is $50.00 and the discount is 10%, the price to the end customer will be $45.00.

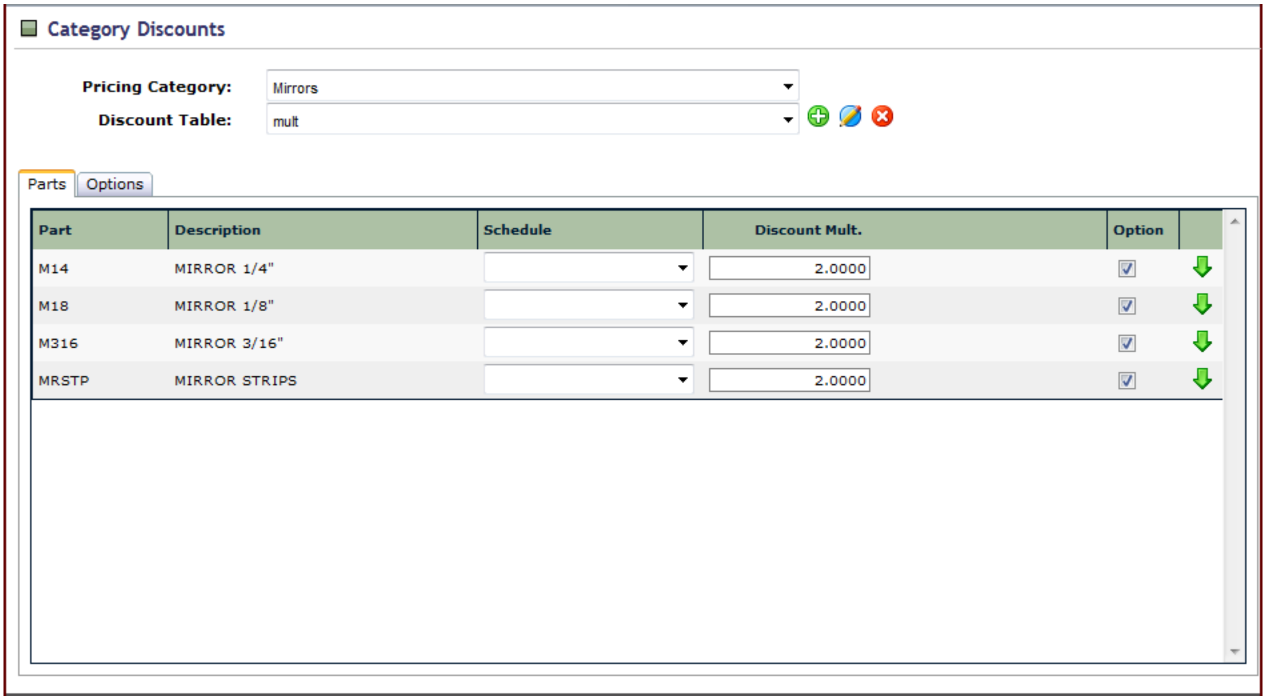
- **Markup from Cost - I**ncrease from cost (manufacturer's price to the Web Center user). For example, if the manufacturer's price to the Web Center user is $50.00 and the markup is 10%, the price to the end customer will be $55.00.

- **Gross Margin** - Difference between cost and selling price. For example, if the manufacturer's price to the Web Center user is $100.00 and the margin is 20%, the price the end customer will be $125.00

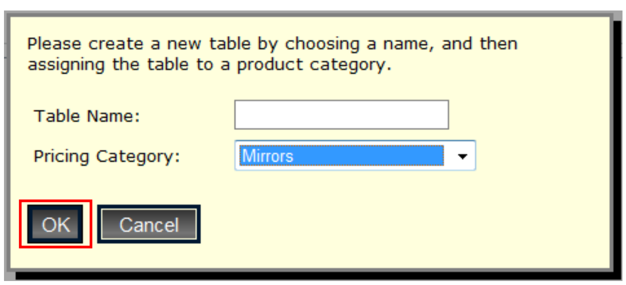
Discount, Markup, and Margin Tables

To set up pricing tables, complete the following:

1. Click Setup → Pricing → {Discounts / Markups / Margins}.
2. In the example below, category discounts is used as the pricing method. (Follow the same procedure to set up markup and margin tables.)

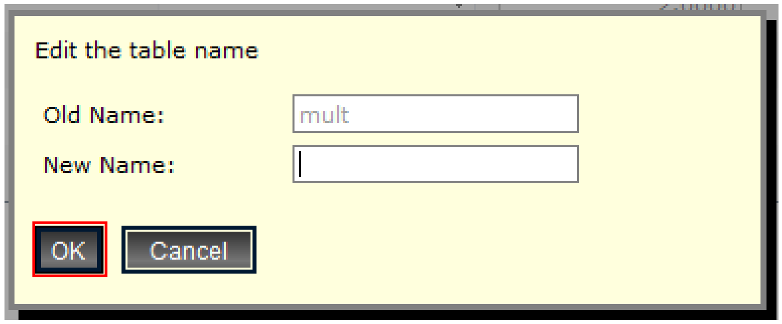


3. To add a new discount table, click the  button.



4. Enter the name of the new discount table and choose the product category.
5. Click the "OK" button to add the new table or the "Cancel" button to cancel the changes.
6. When "OK" is selected, the screen will display the parts for the category. The user can fill in the table with the discount(s), per global option and per part-specific option. Now, the table is available to be assigned to customers in Customer Setup.

7. To edit the name of a discount table, select the  icon. The user will be prompted with the following box:



8. Enter the new name.

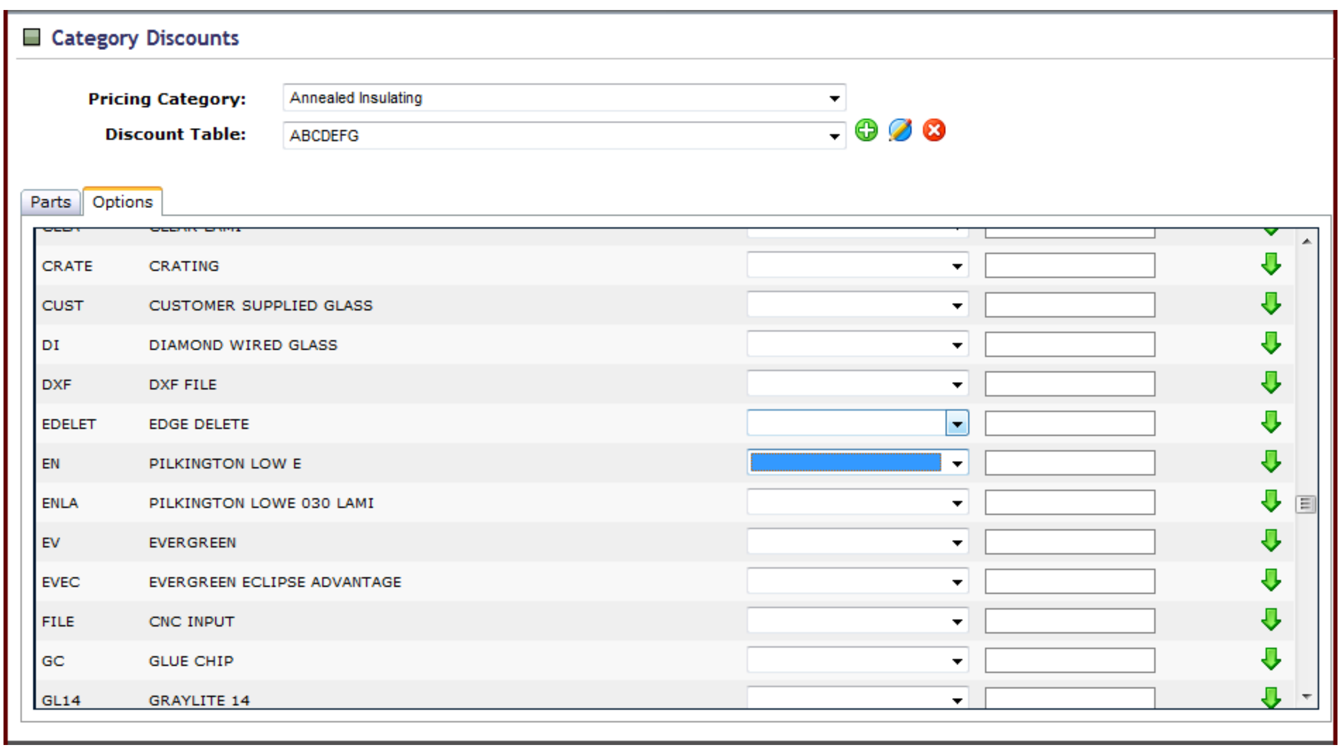
9. Click the "OK" button to save or "Cancel" button to delete changes.

10. To delete a table, click the  icon. This will permanently delete the selected table.

11. In the Parts tab, if the option checkbox is checked off for a part then the value entered for the part will be used for the part's options unless an overriding value for the option has been entered.

12. Click the Options tab to add pricing to options. For example, if the user wanted to give away Low-E in a special promotion, the following steps would be completed:

    a. Click the Options tab, find the Low-E option and enter 100%. This will give free Low-E to any customer assigned to the Free Low-E table.



b. The green down arrow allows the specified value to be filled down to all parts below the row (if in the parts tab) or all options below the row (if in the options tab).

Company

This section will show how to enter company information and create users.

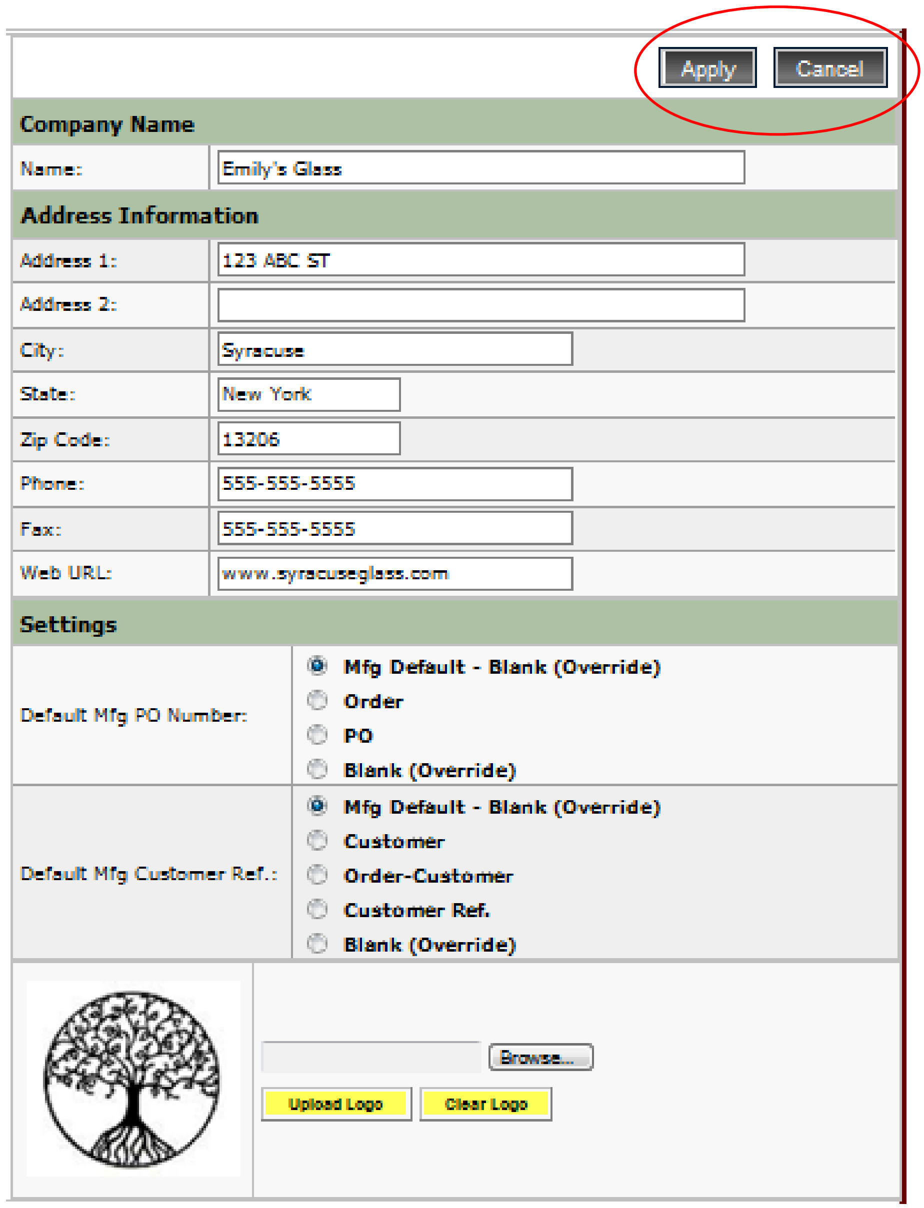
Information

To enter information about a company, complete the following:

1. Click Setup → Company → Information.

2. Click the name of the Web Center user's site in the list on the left side of the screen.

3. Click the "Edit" button on the right side of the page to add information.



4. Edit the Company and address information in the provided fields, as needed. *Note: this information will be displayed on the quote report given to the end user.*

5. The Default Mfg PO Number and Default Mfg Customer Ref settings are used when the quote is uploaded to the manufacturer. The PO Number and Customer Ref between the Web Center user and the end customer are not necessarily the same PO number and Customer Ref between the manufacturer and the Web Center user.

6. To add a logo, click the “Browse…” button. Select the logo to be added.

7. Press ‘Upload Logo’ to upload the logo to Web Center. Press ‘Clear Logo’ to remove the logo from Web Center. The logo will be displayed on reports given to the end customer.

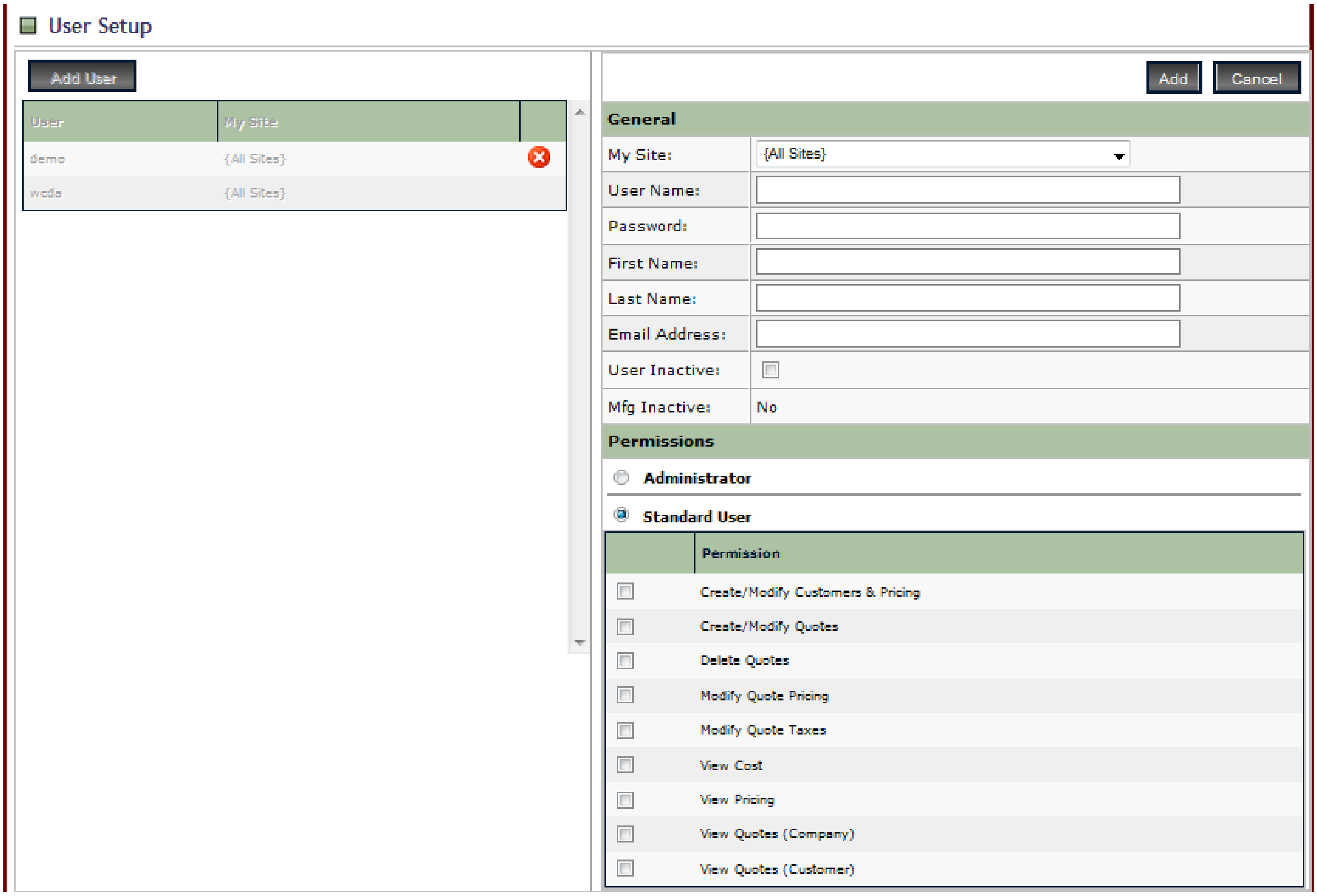
8. Click the “Apply” button to save or the “Cancel” button to delete the changes.

Users

To add additional users or change the permissions of a user, complete the following:

1. Click on Setup → Company → Users.

2. Click the "Add New User" button, and then complete the information on the right side of the screen. *(User name, password and permissions are required.)Note:* If the Inactive box is checked, the user will not be able to log into Web Center.



3. The default permission is set to Administrator, equivalent to a standard user with all boxes checked. If a Standard User is selected, permissions can also be selected. Permissions that can be selected are as follows:

   - Create/Modify Customers & Pricing
   - Create/Modify Quotes
   - Delete Quotes
   - Modify Quote Pricing
   - Upload Quotes
   - Upload Quotes with Exceptions
   - View Cost
   - View Pricing

- View Quotes of All Users

4. Click the “Add” button.

Note: Users can be edited and deleted. Some users don’t have a delete icon next to them – these users were created by the manufacturer and therefore cannot be deleted.

My Login

The ‘My Login’ screen allows the currently logged-in user to change their First Name, Last Name, E-Mail Address and Password.