



eBusiness Manager Overview Document

for Sage 100 ERP

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Introduction

This document includes overview information about each task in the eBusiness Manager module that is accessible from the menus. You can print this document to use as an offline reference.

The information in this document is also available in the Help system in the overview Help topics.

For additional information about the software, refer to the Help system, which also includes the following:

- Overview information for windows that cannot be accessed directly from menus
- Procedures that guide you step-by-step through common activities
- Explanations of important concepts
- Field descriptions
- Flowcharts
- FAQs

Main Menu

User ID Maintenance

Navigation

Select eBusiness Manager Main menu > User ID Maintenance.

Overview

Use User ID Maintenance to set up user IDs for .order customers allowed to access your Web pages, and to maintain user ID information for both .order and .store customers. Security for User ID Maintenance is separate from the security for Library Master User Maintenance.

You can use User ID Maintenance to maintain .store customers, but not create them. A user ID is automatically created when a .store customer accesses your Web site. In addition, when a .store customer submits a shopping cart order, a customer record is created, and a customer number is assigned using the Next Customer Number specified in the eBusiness Manager Options window, or in the Accounts Receivable Options window. If the Accounts Receivable Divisions check box is selected in the Accounts Receivable Options window, the .store division number entered in eBusiness Manager Options is used in conjunction with the next customer number.

By default, .store customers can submit shopping cart orders and modify profile information through the Internet.

UID/Customer Accept/Reject Entry

Navigation

Select eBusiness Manager Main menu > UID/Customer Accept/Reject Entry.

Only one user at a time can access this task. The second user accessing this task will open an inquiry window where fields can only be viewed.

Overview

Use UID/Customer Accept/Reject Entry to set the status of submitted changes to .order user IDs and customer information that did not go through the automatic acceptance process. User ID changes submitted over the Internet go through the automatic acceptance process if the Require Acceptance of User ID Changes check box is cleared in the Accounts Receivable Internet Customer window. Customer changes submitted over the Internet go through the automatic acceptance process if the Require Acceptance of Customer Changes check box is cleared in the Accounts Receivable Internet Customer window.

Profile changes submitted by .store customers update both the eBusiness Manager user ID record and the customer record, and are always updated through the automatic acceptance process.

NOTE Because changes to user ID and customer information for .store customers are automatically updated from your Web pages, only .order customer records appear in UID/Customer Accept/Reject Entry unless there is an error in the automatic update.

When changes that require manual acceptance are submitted, the changes are assigned a status of Pending. You can set the status to Accepted or Rejected and enter an e-mail reason code containing a standard e-mail message. You cannot make modifications to the change submitted over the Internet.

During the update process, e-mail notifications are sent if the appropriate options have been selected in eBusiness Manager Options and E-mail Notification Maintenance.

If the update fails, any orders that were not updated appear in UID/Customer Accept/Reject Entry with a status of Error. You can change the status of each user ID/customer change to Accepted or Rejected again and restart the update process, or view the Web Error Log for more information about errors that occurred during the update.

UID Customer Register

Navigation

Select eBusiness Manager Main menu > UID/Customer Register.

Overview

Use UID/Customer Register to print and update user ID and customer change information. Changes with a status of Pending do not print on the register. Information on the register includes the type of change (user ID or customer), the user ID/customer number, the user submitting the change, the date and time of the submission, the change status, and the e-mail reason. Review the UID/Customer Register for accuracy before updating.

UID Customer Auto Acceptance Log

Navigation

Select eBusiness Manager Main menu > UID/Customer Auto Acceptance Log.

Overview

The UID/Customer Auto Acceptance Log prints a list of the user ID and customer changes and additions that were automatically updated from the Web engine for both .order and .store customers. Information on the log includes the type of change (user ID or customer), the user ID/customer number, the user submitting the change, and the update date and time. If the Suspend Access to Web check box is selected for a user ID in the User ID Maintenance window, a Y appears in the Suspend Access column on the log. If a customer number is not assigned to a new record for a .store customer, Unassigned prints in the customer number column. After the log prints, you can clear the log file.

Shopping Cart Accept/Reject Entry

Navigation

Select eBusiness Manager Main menu > Shopping Cart Accept/Reject Entry.

Only one user at a time can access this task. The second user accessing this task will open an inquiry window where fields can only be viewed.

Overview

Use Shopping Cart Accept/Reject Entry to set the status of changes to shopping cart submissions that do not go through the automatic acceptance process. Shopping cart submissions go through the automatic acceptance process if the Require Acceptance of Shopping Cart Submits check box is cleared in the Accounts Receivable Internet Customer window.

Shopping cart submissions from .store customers appear in Shopping Cart Accept/Reject Entry with a status of Pending if the order has a payment type other than credit card, and the Require Acceptance of Sales Order Submits check box is selected in the Accounts Receivable Internet Customer window. If an Internet Customer record has not been created for the .store customer, the Require Acceptance of Shopping Cart Submits check box must be selected in eBusiness Manager Options for .store non-credit card orders to appear in Shopping Cart Accept/Reject Entry.

If the Credit Card Processing module is installed and registered, orders with a credit card payment type will always go through the automatic acceptance process. If the pre-authorization transaction for the credit card submitted is not successful, the status of the shopping cart order is set to Pending. The CVV number included on the shopping cart is not stored. To include the CVV number in the credit card transaction request, select the Perform Credit Card Authorization when Submitted check box in eBusiness Manager Options.

When shopping cart orders that require manual acceptance are submitted, they are assigned a status of Pending. You can set the status to Accepted or Rejected and enter an e-mail reason code containing a standard e-mail message about the status change. Only reason codes defined in E-mail Reason Code Maintenance can be entered. The status change and e-mail reason code are then displayed in the grid. You cannot make modifications to the submitted shopping cart.

You can change the status of the submission. During the update process, e-mail notifications are sent based on the options selected in eBusiness Manager Options and E-mail Notification Maintenance. In the Sales Order files, shopping cart orders are treated like new sales orders entered in Sales Order Entry. Orders can be put on hold and assigned hold reason codes only after the update to the Sales Order files. Kits for which Automatic is selected in the Explode Kit field in Item Maintenance are exploded when the Shopping Cart Register is updated. For more information, see Using Sales Kits.

If the update fails, any orders that were not updated appear in Shopping Cart Accept/Reject Entry with a status of Error. You can change the status of each order to Accepted or Rejected again and restart the update process or view the Web Error Log for more information about errors that occurred during the update.

Shopping Cart Register

Navigation

Select eBusiness Manager Main menu > Shopping Cart Register.

Overview

Use Shopping Cart Register to print and update shopping cart orders from .store and .order customers. Orders with a status of Pending do not print on the register. Information on the register includes the customer number and name, the user submitting the order, the date and time of the order, the order status, the e-mail reason, and the order total.

For new .store customers without a customer number, Unassigned prints in the customer column. Review the Shopping Cart Register for accuracy before updating.

Shopping Cart Auto Acceptance Log

Navigation

Select eBusiness Manager Main menu > Shopping Cart Auto Acceptance Log.

Overview

The Shopping Cart Auto Acceptance Log prints a list of shopping cart submissions that were updated automatically from the Web. Information on the log includes the sales order number, customer number and name, the user submitting the change, the update date and time, the order status, payment type, customer type, the order total, and the order status/reason.

If an item does not have sufficient quantity available (based on the update calculation), the following information is also included on the log: item code and description, warehouse, and quantity ordered. After the log prints, you can clear the log file.

NOTE The order status and reason code information prints on the log if the order is on hold.

Web Error Log

Navigation

Select eBusiness Manager Main menu > Web Error Log. In the Web Error Log window, select a record and click the Zoom button.

Overview

Use Web Error Log Detail to view Web error detail for the selected record.

Setup Menu

e-Business Manager Options

Navigation

Select eBusiness Manager Setup menu > eBusiness Manager Options.

- For new companies, you can only access this task after completing the eBusiness Manager Setup Wizard.
- Only one user at a time can access this task. The second user accessing this task will open an inquiry window where fields can only be viewed.

Overview

Use eBusiness Manager Options to maintain features most appropriate for your business. Some of these options are defined during new company setup using the eBusiness Manager Setup Wizard, but can be maintained in this window.

Web Template Options

Navigation

Select eBusiness Manager Setup menu > Web Template Options.

Overview

Use Web Template Options to customize links, buttons, menu styles, and other options on your Web pages. You can also set up preferences for your Products and Services Web page, and set up attachments to display with items on the Item Detail Web page.

Images are stored in the MAS90\Images\xxx folder (where xxx is the company code). If you associate an image with an attachment, only file names with a .bmp, .jpg, or .gif extension are accepted.

WARNING When .bmp image files are used on a Web page, performance is extremely slow. Use .jpg or .gif files for faster performance.

Web Menu Maintenance

Navigation

Select eBusiness Manager Setup menu > Menu Maintenance.

Overview

Use Web Menu Maintenance to add new menu items, modify the default menus, and modify the menu text on your Web pages. Separate menus are set up for .store and .order customers.

You can change the display order of menu items. Although you cannot delete default menu items (permanent records), you can modify the menu item settings so that the menu items do not appear. You also can create new menu items using different sequence numbers.

Web Menu Maintenance can also be used to add Help pages to your Web site, which can provide customers with information such as the return policy or shipping rates.

Category Maintenance

Navigation

Access this window using one of the following methods:

- Select eBusiness Manager Setup menu > Category Maintenance.
- Select eBusiness Manager Setup menu > Category Tree Maintenance. In the Category Tree Maintenance window, click Category.

Only one user at a time can access this task. The second user accessing this task will open an inquiry window where fields can only be viewed.

Overview

Use Category Maintenance to create and maintain categories for the Products and Services Web page. Creating categories allows you to organize your inventory items under category names (not category codes) that appear on your Web pages. You can also create separate categories for your .order and .store customers, as needed. You can perform a search for a top category, or for all categories.

You can enter a short category description that is limited to 200 characters, or enter a long description for the category that includes HTML markup. Both category descriptions appear with the category on the Products and Services Web page.

Items must be assigned to categories in Item Maintenance or Product Line Maintenance for the items to appear on the Products and Services Web page.

Changes made to categories in this window are also reflected in Category Tree Maintenance.

Category Tree Maintenance

Navigation

Select eBusiness Manager Setup menu > Category Tree Maintenance.

This task is available only if the appropriate security is set up.

Only one user at a time can access this task. The second user accessing this task will open an inquiry window where fields can only be viewed.

Overview

Use Category Tree Maintenance to build a tree structure that defines how categories appear on the Products and Services Web page. After you set up your category tree structure and click Accept, a JavaScript is generated for use on the Products and Services category frame page.

Separate category trees can be created for .order and .store customers. All categories are established in Category Maintenance.

NOTE Categories set up as top categories cannot be used as subcategories in category trees, and cannot be removed from category trees.

E-Mail Notification Maintenance

Navigation

Select eBusiness Manager Setup menu > E-mail Notification Maintenance.

Overview

Use E-mail Notification Maintenance to maintain e-mail notifications. You can select whom to notify (user, client supervisor, Webmaster, salesperson, or other), enter the e-mail notification subject, insert merge fields, and modify the message to be sent with the notification.

E-Mail Reason Code Maintenance

Navigation

Select eBusiness Manager Setup menu > E-mail Reason Code Maintenance.

Overview

Use E-mail Reason Code Maintenance to establish e-mail reason codes. Reason codes can be created for order rejections (for example, Incomplete Address Information, Credit Limit Exceeded, and Incomplete Order Information), order acceptances (for example, Order Received and Order Shipped), or order messages (for example, Thank you for your Order and Special Pricing Announcement).

Reason codes can be merged into e-mail notifications. They can also be added to user ID and customer changes in UID/Customer Accept/Reject Entry and to shopping cart submissions in Shopping Cart Accept/Reject Entry. In addition, a reason code can be entered when a sales order generated from a shopping cart submission is deleted in Sales Order Entry. When a reason code is entered, the reason code description established in E-mail Reason Code Maintenance replaces the <<REASON>> merge field inserted in E-mail Notification Maintenance.

Template Maintenance

Navigation

Select eBusiness Manager Setup menu > Template Maintenance.

Only one user at a time can access this task. The second user accessing this task will open an inquiry window where fields can only be viewed.

Overview

Use Template Maintenance to change the HTML templates used to display your Web pages.

The .inquiry, .order, and .store applets each contain a collection of Web templates. The Template Maintenance window displays which applets must be registered for the template code selected. At least one of the applets assigned to the template must be registered for the template's Web pages to be accessible on the Internet.

NOTE When a new eBusiness Manager applet is installed, the Web Engine must be stopped and restarted for the changes to take effect.