

SAMCO

Building business and technology relationships.

eSamco



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Please note that this document has been formatted for ease of reading in the electronic version. If you do print them to paper, you will note that a larger font has been used.



eSamco Introduction

Welcome to the world of e-commerce. Your Power Accounting software will be updated to include new programs and features to assist you in creating a site for your customers to utilize for purchasing product, checking on orders, getting pricing, looking up account information and, if you purchased the option, even paying their account with their credit card.

All of this is designed so that your customers will be working for you, allowing you to spend more time growing your business.

This is a partnership between you and Samco. We want you and your site to succeed, and will work with you to help you achieve an attractive and effective site. You will or may already have discussed a number of options and setup configurations with your eSamco assistant or sales rep.

Your Power Accounting software will be updated with the most recent set of programs. Included in this update are the **WEB INTEGRATION** and **GLOBAL DX** modules which control the running of your eSamco site.

A special user has been or will be added to the Power Accounting system. It is **VITAL** that no one change, delete or use this user (SSI with initials of SSI) as this user controls the importing of your customer orders from the eSamco site into your accounting software.

Remember the services of your eSamco Assistant are included in your set up fee as well as in your monthly charge. We are here to offer advice and assistance wherever possible.

There are a number of rules that must be followed for the eSamco (your e-commerce) site. We have utilities and reports to assist with any conversions that might need to take place.

If you are new to the Power Accounting suite, then your Project Manager will be working with you to set up and organize your data so that your data is in the best possible shape for eSamco. If you and/or your Project Manager have questions or concerns, remember to contact your eSamco Assistant (esamcohelp@samco.com) at any time.

We've included a form on the next page for use if you or your customers encounter an error or other problem on the eSamco site. Please help us help you by completing it with as much detail as you have available to you. Please be assured that when you provide the user's login and password, we will maintain confidentiality. We can contact your customer directly if you wish, but we do not have to, our goal is to provide assistance as efficiently as possible.



eSamco request for support

Please use this form to report issues you or your customers (end user) have with the esamco site.

Fax (604) 597-4878 ♦ Phone (604) 597-4211 ♦ Email: esamcohelp@samco.com

Support id# _____
(we'll assign)

WHO ARE YOU?

Your Company Name: _____

Contact: _____

Phone number: _____

Email: _____

WHO IS YOUR CUSTOMER?

End user customer #: _____

End user login name: _____

End user name: _____

End user password: _____

CAN WE CONTACT YOUR CUSTOMER DIRECTLY?

Yes / No

End User Phone #: _____

End User Fax number: _____

IS THERE AN ERROR PRINTED IN RED?

What error in red says: _____

Where error is seen: _____

What steps have you taken to fix: _____

IS THERE ANOTHER PROBLEM?

Please describe problem, including where it can be seen. Include steps already taken by you:

HAS ORDER BEEN RECEIVED IN YOUR OFFICE? (either via eSamco or other method):

Yes / No

If **YES**, we may empty the cart if that will resolve the issue. If **NO**, we will attempt to save the cart before we empty it, and if that is not successful, we will take a 'picture' of the cart so that it can be re-entered.



Let's check out your data

WEB INTEGRATION → REPORTS → WEB CUSTOMER READINESS CHECK

There are non-allowable characters which must be removed from the customer number. Run this report to get a list of those customer numbers that need to be changed. Non-allowable characters mostly consist of the special characters found on the typewriter keyboard, above the numbers (accessed with shift), but also include the slashes (\ or /).

To begin:

- Go to **WEB INTEGRATION → REPORTS → WEB CUSTOMER READINESS CHECK**
- Enter F1/F1 for the starting and ending customer number.
- Reply N for warnings
- Reply Y to create a file to be used when the customer numbers are changed.

Print the report. Any customer number containing non-allowable characters will be listed, along with a suggested replacement number.

If you wish to accept the suggested replacements, then at your earliest convenience, please have all users exit the software.

- Go to **ACCOUNTS RECEIVABLE → F2 → FILE UTILITIES → CHANGE CUSTOMER NUMBER.**
- Press F1 to use a file
- Enter in the file name of XX/WICUSFIX.TXT where XX is your company number.

If you do not like the suggested replacements, contact your eSamco assistant to discuss other possibilities and have the file changed accordingly. Then the above steps for changing the customer number can be followed.

WEB INTEGRATION → REPORTS → WEB ITEM READINESS CHECK

As listed above in the overview, there are non-allowable characters which must be removed from the item number. Run this report to get a list of those item numbers that need to be changed. Non-allowable characters mostly consist of the special characters found on the typewriter keyboard, above the numbers (accessed with shift). You may see items using the slashes (/ or \) on this list. If possible, we would recommend replacing them with the underscore (_), however they are allowed.

For images, the slashes MUST be replaced with the underscore, even if the item number remains with the slashes instact.

To begin:

- Go to **WEB INTEGRATION → REPORTS → WEB ITEM READINESS CHECK**
- Enter F1/F1 for the starting and ending item number.
- Reply N for warnings
- Reply Y to create a file to be used when the item numbers are changed.

Print the report. Any customer number containing non-allowable characters will be listed, along with a suggested replacement number.

If you wish to accept the suggested replacements, then at your earliest convenience, please have all users exit the software.

- Go to **INVENTORY MANAGEMENT → F2 → FILE UTILITIES → CHANGE ITEM NUMBER.**
- Press F1 to use a file
- Enter in the file name of XX/WIITMFIX.TXT where XX is your company number.

If you do not like the suggested replacements, contact your Samco assistant to discuss other possibilities and have the file changed accordingly. Then the above steps for changing the item number can be followed.



Power Accounting Setups for eSamco

WAREHOUSES (INVENTORY → F2 → SETUP → WAREHOUSES)

The field 'allow on web' determines if this warehouse is to be included on the eSamco site. When the item is displayed, and the customer clicks on the quantity available icon, only those warehouses with Y in this field will be included for viewing. The name of your warehouse should be something that will be appropriate for the public to see.

CATEGORY/SUB-CATEGORY (INVENTORY → F2 → SETUP → CATEGORIES AND SUB-CATEGORIES)

The set up and assignment of categories to items is most crucial for your eSamco site. It is the method by which your customers will be able to easily locate the items you have for sale. Every item for display on your eSamco site must be connected to at least a category, as sub-categories are optional. An item that is not attached to a specific category should be attached to a 'miscellaneous' category as no blank categories are permitted. The same applies to sub-categories if they are being used.

There are two distinct situations regarding Categories and Sub-Categories and separate instructions for each situation. Please determine your specific situation and read the associated information.

You are set up for categories (and possibly Sub-Categories) and your Inventory Control Information (INVENTORY → F2 → SETUP → CONTROL INFORMATION → 4TH PAGE) says to VALIDATE

You will want to review your current categories to ensure that the list is what you want your customers to see on the eSamco site. The category name is displayed on almost all screens, as is the sub-category name when the cursor hovers on its associated category.

If changes are to be made, you can use the menu option INVENTORY MANAGEMENT → F2 → FILE UTILITIES → SET ITEM FIELDS to make group changes to your item records or use INVENTORY MANAGEMENT → ITEMS → ENTER to make them individually.

The category record has a field called allow on website, the default response is Y. If there is a category that should not be included on the eSamco site, please set this flag to N. Please repeat for sub-categories. Remember that a category that does not display on the eSamco site means that your customer will not be able to find any of the items associated with that category, unless they search for it specifically by item number. The same applies for the sub-category.

When happy with the categories and sub-categories assigned to your items, move to the next step.

You are either set up for categories (and possibly Sub-Categories) but your Inventory Control Information (**INVENTORY MANAGEMENT → F2 → SETUP → CONTROL INFORMATION → 4TH PAGE**) says to not validate or you are not using categories or sub-categories.

In either situation, we must begin by setting the above field(s) to Y and then begin designing a system by which you can gather your items into logical groupings. This is not a case of more is better, actually quite the opposite. A good number to aim for would be 20-30. Once the first grouping has been done, then sub-categories can be used to refine the groupings within a category.

Samco can assist you in developing this categories and sub-categories, and whenever possible, we can provide utilities to make the changes for you. In some instances, users will be required to change the item records.

You will need to determine whether it is easier to start from scratch, setting all categories and sub-categories to one default value, and then working from there, or altering what is already entered and bringing all categories and sub-categories into some standard. Once you are happy with the categories and sub-categories, switch to validating your categories and sub-categories in the control file (**INVENTORY → F2 → SETUP → CONTROL INFORMATION → 4TH PAGE**) so that all items from that point onward will be correctly classified.

When setting up the valid category records, the field called allow on website determines if the items associated with this category will be included on the eSamco site or not. When you do not wish all of the items associated with the category, please set this flag to N. Please repeat for sub-categories. Remember that a category that does not display on the eSamco site means that your customer will not be able to find any of the items associated with that category, unless they search for it specifically by item number. The same applies for the sub-category.

WEB INTEGRATION → UTILITIES → LOAD CATEGORIES FROM ITEMS

This procedure can be used to assist in you in creating your categories if you have not been entering / validating them prior to this exercise. When run, any category that is listed on any item will be created in the appropriate file. Once run, use **INVENTORY → F2 → SETUP → CATEGORY CODES** to see all of the now valid codes. Determine which should be kept, which ones deleted and what they should be replaced with. Use **INVENTORY → F2 → FILE UTILITIES → SET ITEM FIELDS** to move items from one category to another.

WEB INTEGRATION → UTILITIES → LOAD CAT/SUBCAT RELATIONS

This procedure can be used to assist in you in creating your sub-categories if you have not been entering / validating them prior to this exercise. When run, any sub-category that is listed on any item will be created in the appropriate file. Once run, use **INVENTORY → F2 → SETUP → SUB-CATEGORY CODES** to see all of the now valid codes. Determine which should be kept, which ones deleted and what they should be replaced with. Use **INVENTORY → F2 → FILE UTILITIES → SET ITEM FIELDS** to move items from one sub-category to another.

WEB INTEGRATION → UTILITIES → LOAD CAT / SUB-CAT RELATIONS

Once the categories are set and the sub-categories are set, use this option to load the various category / sub-category combinations. These combinations are what control the display on the eSamco site. Because you have done the work in the Inventory Management module, there should be few changes required.

WEB INTEGRATION → CATEGORY / SUB-CATEGORY LINKS

If any changes or additions/deletions need to be made to the category / sub-category relationship that is displayed on the eSamco site, this tool will help. The relationship is open. You may have sub-categories that apply to many categories (small, medium, large sub-categories applied to both the category for shirt and the category for pants) or you may have a strict one-to-one relationship (Category Chevy with a Sub-Category Blazer). Either option is acceptable. Remember that connecting a sub-category to a category here does not mean that any items are associated with it yet. That still needs to be done in **INVENTORY MANAGEMENT → ITEMS → ENTER.**

Recap on category / sub-category

Here are a couple of examples of how your categories and sub-categories can be set up. What determines the best method (these are just samples) is what set up will assist your customers in find your products with ease.

Category	Sub-Category	(B)	3 categories, 2 shared sub-categories, 3 unique sub-categories
Adidas	Shoes		
	Pants		
Roots	Hoodies		
	Hats		
	Jackets		
UnderArmor	Pants		
	Hats		

Category	Sub-Category	(C)	4 categories, 3 shared sub-categories.
Hats	UnderArmor		
	Roots		
Jackets	Roots		
Pants	UnderArmor		
	Adidas		
Hoodies			Roots

INVENTORY MANGEMENT → ITEMS → ENTER

On the second page of the item, a flag called 'allow on web' controls where or not this item will appear on your eSamco site. Please remember that if you have *misc items you use for notations or labour items, you will need to decide which, if any, will appear on the eSamco site.

ACCOUNTS RECEIVABLE → F2 → SETUP → SHIP-VIA

The field 'show on web' determines if this ship-via method is to be included on the eSamco site. When the customer completes the order, on the billing screen the customer can select the shipping method from a list generated from the ship-via codes set up in power accounting. Only those ship-via codes with Y in this field will be included for viewing. The name of your ship-via code should be something that will be appropriate for the public to see.

INVENTORY MANAGEMENT - IMAGES

Your eSamco system will first be setup with a standard 'no-image' image until such time as you replace that image with one of your own. Image files must have the exact same number as the item it belongs to, and must be in .jpg format. (The .jpg file for item number ABC123 must be ABC123.jpg) If one picture can be used for more than one item, then multiple image (.jpg) files must exist. (ABC123 and ABC678 can use the same picture, but that means that two .jpg files, ABC123.jpg and ABC678.jpg are required)

In the same way that .jpg files can be downloaded to allow images of your items to be displayed on your eSamco site, .pdf files containing extra information on your products can also be downloaded. The naming convention is the same as for images, the file name must match exactly the item number. (The .pdf file for item number ABC123 must be ABC123.pdf)

If you have a great number of image and or pdf files, they can be sent either via email to esamcohelp@samco.com or burned to a CD and sent to our office. We will publish the images to your eSamco site for you. If, however, you wish to upload your images on a one by one (actually you can do 4 image files at a time) yourself, log onto your ADMIN panel and follow the instructions. More detail on how to upload jpg and pdf files will appear later in this documentation.



yourcompany.esamco.com

This system has been designed to display what you want to have displayed, within reason and certain guidelines. Updating information on your eSamco site is as simple as making the desired change in your Power Accounting software or providing us with the pictures/images and text you want added.

The Banner

This is the section at the very top of the page. In the very right hand corner is a reference to eSamco. The remainder of this section usually contains your company name and / or logo. It may also have a picture or design in the background.



The Welcome

The welcome message sits (normally) in the centre of the first page and is displayed when the site yourcompany.eSamco.com is first entered. The first part of the welcome (for members) is “Welcome to MYCOMPANY, Member Name”. The next part is one which should entice the viewer to look further into the site. Pictures may be added if you wish, discuss any specifics with your e-Samco assistant.

The Navigation

The navigation area is split between those available to active members and those for guests (and non-active members).

Categories

Both members and guests will see the section of categories, which has been discussed in detail in the Power Accounting section of this documentation. If, when looking at your site, you are not satisfied with your list of categories, making changes to what is seen on the eSamco site is controlled by what is changed within your Power Accounting setups.

Items

Once a list of items is displayed, the headings item number, description, qty avail and retail price are all open to be used in re-sorting the data. As well, the quantity available for each item is a link to a more detailed view of the item, listing each warehouse (those that have been set up to be included) the quantity available in each of those warehouse, as well as the quantity on order and the estimated date of arrival (ETA). These last two pieces of information are optional.




Added to the navigation area for active members only are:

Categories (cart to completion)

Click on a category and (optional) sub-category to locate all of the items that have been assigned there. The advanced search may be used further refine the search.





The item will be listed, along with the description, the quantity currently available, the retail/standard pricing and your own specific price for that item. Should you wish to purchase one of the items, enter the quantity desired and click on the cart icon.

Image	Item Number	Description	Qty Avail.	Sugg. List	Net Price
	AA90051	KEY CHAIN, ROPE BALL	27 <input type="text"/>	<input type="text"/>	<input type="text"/>
	AA90070	KEY CHAIN, CORK FLOAT SINGLE CORK	167 <input type="text"/>	<input type="text"/>	<input type="text"/>
	AA90071	KEY CHAIN, CORK FLOAT DOUBLE CORK	39 <input type="text"/>	<input type="text"/>	<input type="text"/>

This process is repeated until you are finished shopping. Click on the view cart (x) link in the top right hand corner to review the order; making any adjustments that are required. The subtotals and totals are displayed for convenience, but may not include freight or any applicable handling charge that is determined at the time of invoicing, unless it has been specifically set up to do so.

View Cart

#	Image	Item#	Qty.	Description	Comments	Qty Avail.	Per Unit	Extended	Del
1		FL001	<input type="text" value="5"/> EACH	Pike leech black Bass and Pike	Add	48	\$ 14.85	\$ 74.25	
								SubTotal:	\$ 74.25
								Discount:	-\$ 0.00
								Freight:	\$ 0.00
								Misc:	\$ 0.00
								GST 12 %	\$ 8.91
								PST 0 %	\$ 0.00
								Total:	\$ 83.16

This is the message that will appear when MEMBERS access their CART. What is written here is controlled by you.

[Save Cart](#) [Check Out](#) [Empty Cart](#)

If changes are made, be sure to use the update icon.

When the order is complete, you may use the save cart option before checking out to save this exact order for recall and later submission as a repeat order, the empty cart option to permanently remove this order or the check out link to continue.

Save Cart

New Order

Overwrite Existing Order

The next screen will display information for billing and shipping addresses, as well as a place for a Purchase Order number if required and a place the desired shipping method to be selected.

Billing Address:		Shipping Address:	
First Name:	Joe	First Name:	Joe
Last Name:	Smith	Last Name:	Smith
Company Name:	KAMLOOPS FARMING CO-OP	Company Name:	KAMLOOPS FARMING CO-OP
* Address:	BOX 5555	* Address:	BOX 5555
	1234 GOTTSBURG AVENUE		1234 GOTTSBURG AVENUE
* City:	MOOSE JAW	* City:	MOOSE JAW
* State or Province:	SK	* State or Province:	SK
* Country:	Canada	* Country:	Canada
* Zip or Postal Code:	S4P 3W7	* Zip or Postal Code:	S4P 3W7

Order Details :	
* PO # :	
Shipping Method:	DHL/LOOMIS
Courier Account #:	
Order Comments:	

Payment Details:	
Method:	<input checked="" type="radio"/> On Account

Reset Submit

Note: Changes to the ship-to address will NOT affect taxes

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Enter the order comments if they are required, then click on the submit radio button. If your eSamco site has been configured for Credit Card purchases by guests only, then the Payment Details box will look like.

Payment Details:	
Method:	<input checked="" type="radio"/> Credit Card

If your eSamco site has been configured for Credit Cards for both guests (non-customers) and members (customers), the Payment Detail box for customers/members will look like:

Payment Details:	
Method:	<input type="radio"/> On Account <input checked="" type="radio"/> Credit Card

If you do not allow Credit Card purchases for members/customers, the Payment Details box will look like:

Payment Details:	
Method:	<input checked="" type="radio"/> On Account

Account Management

View Current Account

When your customer clicks on this link, the information from **POWER ACCOUNTING → ACCOUNTS RECEIVABLE → VIEW CUSTOMER ACCOUNTS** will be displayed. If there is detail to the invoice (not available for payments), the user can click on the magnifying glass icon. In **POWER ACCOUNTING → ACCOUNTS RECEIVABLE → VIEW CUSTOMER ACCOUNTS**, use the F4 key to display the detail on an invoice. This is identical to what your

customer will see on the eSamco site when requesting the details on an invoice. Comments are included on the view, as well as the totals and the order status field from the first page of the order.

The customer may use their browser print icon to print a copy of this invoice.

The columns for doc#, date (invoice) and due (date) are open for your customers to use in re-sorting the display. The more data there is displayed, the longer the screens will take to load and to refresh. Therefore it is very important that your accounting staff is keeping this display clean. To do this, ensure that all payments received are properly applied to the documents which they are paying and that on a regular basis, the fully paid open items are purged. If you are not sure of these functions, please work with your eSamco assistant.

Bal Fwd	Invoices	Payments	Cr-Memos	Dr-Memos	Fin-Charges	Balance
\$0.00	\$727,464.11	\$674,967.34CR	\$0.00	\$0.00	\$0.00	\$52,496.77

Page 1 of 5						Page 1	GO
-------------	--	--	--	--	--	--------	----

1	2	3	4	5	next
---	---	---	---	---	------

Doc#	Detail	Type	Date	Applyto	Due	Total	Balance
00117632		I	1/19/2011	00117632	2/18/2011	\$249.31	\$249.31
00117604		I	1/18/2011	00117604	2/17/2011	\$42.27	\$291.58

Access to the View Current Account function may be turned off if you wish.

View Account History

All of the same functions are available as above; only the information is coming from **POWER ACCOUNTING → ACCOUNTS RECEIVABLE → OPEN ITEM HISTORY → VIEW CUSTOMER ACCOUNT HISTORY**. You will need to determine the optimal amount of data to keep on file.

The system will display the total number of pages available, your customers will have access to two different methods of moving through the pages of items.

Drop down

Each page number is listed in a drop down style menu box. The user will select the page and then click the go radio button.

Next

Below the drop down page selector are the next page selector buttons. Pages 1-5 are displayed, click on any one of them or click on the next button to move one page at a time. Use the >> button to advance 5 pages or (when available the) << will move back by 5 pages.

Bal Fwd	Invoices	Payments	Cr-Memos	Dr-Memos	Fin-Charges	Balance
\$0.00	\$37,134,862.10	\$35,452,315.71CR	\$1,630,858.62CR	\$809.00	\$0.00	\$52,496.77

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Access to the View Account History function may be turned off if you wish.

Make Payment on Account

If you have made arrangements for credit card processing for your site, then your members will be able to make a payment to their Power Accounting account from your eSamco site. When the user clicks on the option, a listing of their open items is displayed.

Bal Fwd	Invoices	Payments	Cr-Memos	Dr-Memos	Fin-Charges	Balance
\$0.00	\$727,464.11	\$674,967.34CR	\$0.00	\$0.00	\$0.00	\$52,496.77

Doc#	Date	Due	Balance	Details	Full	Partial	Amount
00115080	09/10/2010	10/10/2010	\$38.12		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00115359	09/24/2010	10/24/2010	\$2,365.86		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00115598	10/05/2010	11/04/2010	\$155.49		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00115707	10/12/2010	11/11/2010	\$273.52		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00115934	10/22/2010	11/21/2010	\$83.85		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00116374	11/11/2010	12/11/2010	\$683.80		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00116471	11/15/2010	12/15/2010	\$67.97		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00116722	11/29/2010	12/29/2010	\$16.77		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00116830	12/03/2010	01/02/2011	\$813.31		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00116857	12/06/2010	01/05/2011	\$452.77		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00116859	12/06/2010	01/05/2011	\$125.77		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
00116872	12/06/2010	01/05/2011	\$154.94		<input type="checkbox"/>	<input type="checkbox"/>	\$0.00

The detail icon is available for displaying the individual line, where the apply-to number is also shown. The detail icon is available from that pop-up window so that the user may see the item detail for that specific invoice. The individual invoice with line detail is displayed in a separate window/tab. From there, the user may view and then print the invoice.

There are a number of payment options shown at the bottom of the page:

When this option is selected, all invoices are marked for full payment - the Balance (owing) and the Total (to be paid) are the same amount.

Bal Fwd	Invoices	Payments	Cr-Memos	Dr-Memos	Fin-Charges	Balance
\$0.00	\$727,464.11	\$674,967.34CR	\$0.00	\$0.00	\$0.00	\$52,496.77

Open Amt
 Total

Pay Due

When this option is selected, all invoices that are due (including overdue) as at the current date are marked for payment – the Balance (owing) and the Total (to be paid) are NOT the same amount.

Bal Fwd	Invoices	Payments	Cr-Memos	Dr-Memos	Fin-Charges	Balance
\$0.00	\$727,464.11	\$674,967.34CR	\$0.00	\$0.00	\$0.00	\$52,496.77

Open Amt	\$0.00
Total	\$16,053.82

Open Payment

When the open payment selection is chosen, a pop-up window appears for the user to enter in the amount that will be applied as an open payment (similar to what happens in Cash Receipts) to the account, as well as a description (reason) for the lump sum amount. The reason field is a required field. The user may enter 20000 rather than 2000.00 – the system will convert. Any lump sum payment that includes cents should be entered exactly with decimals (eg 1234.56).

Enter payment amount ✕

Account Number: MP0375

Note: For a partial payment, a reason must be specified.

Amount:

Reason:

Ok Cancel

Open Amt	Open Payment	\$2,000.00
Total		\$2,000.00

Individual invoice selections

The user is also able to pick and choose, not only the specific invoices that are to be paid, but also whether the selected invoices are to be paid in full or have a partial payment applied against them.

If the invoice displayed is to be paid in full, the user will click the box under the FULL heading. The amount will then reflect the full amount of the invoice in question.

Doc#	Date	Due	Balance	Details	Full	Partial	Amount
00115080	09/10/2010	10/10/2010	\$38.12		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$38.12

If an invoice is to be partially paid, the user will click the box under the PARTIAL heading. When that is done, a pop-up window appears for the user to enter in the amount that will be applied to this invoice as well as a reason for the difference. The reason field is a required field. The user may enter 1500 rather than 1500.00 – the system will convert. Any partial payment that includes cents should be entered exactly with decimals (eg 1234.56).

Enter payment amount ✕

Account Number: MP0375

Note: For a partial payment, a reason must be specified.

Amount:

Reason:

When the user is satisfied with the partial payment entry, clicking OK will return the entered information to the main payment screen.

Doc#	Date	Due	Balance	Details	Full	Partial	Amount
00115080	09/10/2010	10/10/2010	\$38.12		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$38.12
00115359	09/24/2010	10/24/2010	\$2,365.86		<input type="checkbox"/>	<input checked="" type="checkbox"/> Bal 2B paid next week.	\$1,500.00

Clicking this button will clear all of the payment arrangements previously entered and the user will be able to start over at the beginning.

Access to the Make Payment on Account function may be turned off if you wish.

Order Management

View Open Orders

Displaying from your **POWER ACCOUNTING → BILLING (FORMERLY ORDER ENTRY) → ORDERS → ENTER**, your customer can locate and get details on any order that has not yet been completed by invoicing. The details icon (the magnifying glass) is available.

To see what information the customer will see; use **POWER ACCOUNTING → BILLING → VIEW ORDERS**. Enter the customer number and then F1 for the first order or enter in a specific order number.

In this example, an order entered directly into **POWER ACCOUNTING → BILLING (FORMERLY ORDER ENTRY) → ORDERS → ENTER** as well as two orders entered and submitted from the eSamco site are displayed.

View Open Orders

Page 1 of 1 Page 1

1

00060023	View Details	Order	6/2/2011	666	WE LOVE PENS AND PENCILS BOX 4372 2621 GOTTSLEIG ROAD REGINA, SK S4P 3W7 Canada		ASAP	ML	All
WEB00004	View Details	Order	6/3/2011	1	WE LOVE PENS AND PENCILS BOX 4372 2621 GOTTSLEIG ROAD REGINA, SK S4P 3W7	DHL/LOOMIS	ASAP	ML	All
WEB00005	View Details	Order	6/3/2011	5	WE LOVE PENS AND PENCILS BOX 4372 2621 GOTTSLEIG ROAD REGINA, SK S4P 3W7	DHL/LOOMIS	ASAP	ML	All

Access to the View Open Orders function may be turned off if you wish.

Create New Order

Should your customer have a standing / recurring order with you, they may enter it using this link, then save it for later recall and submission. The item number must already be known, as there is no search available here. There are options to save the order or submit it to the cart (start the process of submission to the Power Accounting system).

While adding orders, your customer will be able to use either the [tab] or [enter] key. Key in the item number, press [enter]. Key in the quantity, press [enter]. If the quantity that is ordered each time is fixed, it should be entered. If the quantity varies with each order, then a quantity of zero (0) is acceptable here. The system will display the description on the item, and the per-unit pricing. If the quantity is zero (0), then no cost will display. However, if a quantity is entered, then the extended cost will be displayed.

Key in the next item number and repeat the process. As long as the user continues this pattern, the system will add a new empty line with the focus on the item number field.

If you are using the [enter] method (from above), then as long as you don't click on submit, the system will continue to add a line automatically for you. If you are using the [tab] method, then clicking on [add] following the entry of the last quantity will add a line, and the focus will be on the item number field ready for entry.

You will repeat this process until the order is completed.

You may save the order by clicking on the save order icon. A reference for this order must be entered, or if you are replacing an order that has already been saved, click on the select arrow to see the current orders that have been previously saved. There is room for 10 orders in total. In either situation, when done, the associated save icon must be clicked on.

There is also the option of submitting the order to the cart for immediate processing.

Create New Order							
#	Image	Item#	Qty	Description	Qty Avail.	Per Unit	Ext
1		<input type="text" value="000000000418846"/>	<input type="text" value="10"/> EA	SOLENOID FAIL SECURE 24V NEW EL410	Call	\$198.94	\$1,989.40
<input type="button" value="Add Line"/> <input type="button" value="Remove Line"/> <input type="button" value="Save Order"/> <input type="button" value="Clear Order"/> <input type="button" value="Submit to Cart"/>							

Access to the Create New Order function may be turned off if you wish.

Load Order

We automatically keep the history of each web order submitted (called Last Order) so that, it may be picked up at a later date for alteration and submission. The user may also choose to save an order for later recall in the case of a booking or recurring order.

Load Order

Please pick an order to load

#	Name	Date	Del
	Last Order	4 May 2012, 13:30	
1	my order	3 Feb 2011, 14:20	X
2	mine	3 Feb 2011, 14:26	X
3	July 6, 2011	6 Jul 2011, 09:41	X
4	Blank		
5	Blank		
6	Blank		
7	Blank		
8	Blank		
9	Blank		
10	Blank		

Access to the Load Order function may be turned off if you wish.

View my Web Orders

Also displaying from your **POWER ACCOUNTING → BILLING (FORMERLY ORDER ENTRY) → ORDERS → ENTER**, your customer can locate and get details on orders that has not yet been completed by invoicing. The difference between this function and the View Open Order function from earlier is that only orders created and submitted through the eSamco system will be shown.

10 (1 Webusers)					
Total Orders :	5				
Submitted Orders :	5				
Total Sales :	\$ 3,154.35				
Show Orders (Toggle)					
Order #	Web User	Status	Method	Sale Amt	Created
WEB00005	samco	Submitted	On Account	\$ 532.75	06/03/11
WEB00004	samco	Submitted	On Account	\$ 213.10	06/03/11
WEB00003	samco	Submitted	On Account	\$ 2,280.00	04/15/11
WEB00002	samco	Submitted	On Account	\$ 64.25	03/22/11
WEB00001	samco	Submitted	On Account	\$ 64.25	03/22/11



Invoice Management

View Invoice Details

Displaying from your **POWER ACCOUNTING → BILLING → INVOICE HISTORY → VIEW INVOICE HISTORY → BY INVOICE**, your customer will be able to get details for a specific invoice number and reprint it if required. The detail icon is available for each item on that specific invoice.

View Invoice Details

Invoice number

Item #	Get	Description	Qty	Unit Price	Line Disc	Extended
NKK66CC		CPC003148ABLOY PROTEC KEYSTAMPED CPC, SERIES #SEQUENCE #	1420	\$3.71	\$0.00	\$5,268.20
CPC		ABOVE PRICING BASED ON 160,000 YEARLY LOCKVOLUME AS PER CONTRACT.	1	\$0.00	\$0.00	\$0.00

Comments:

EXITING CODE - BUILT HERE!

[View Print version](#)

Subtotal	\$5,268.20
Disc Amt	\$0.00
Net Total	\$5,268.20
Freight	\$0.00
Misc	\$0.00
Sales Tax	\$684.87
Total	\$5,953.07

Access to the View Invoice Details function may be turned off if you wish.

Item Purchase History

Displaying from your **POWER ACCOUNTING → BILLING → INVOICE HISTORY → VIEW INVOICE HISTORY → BY ITEM#**, your customer will be able to get details for a specific item number. The detail icon is available for your customer to then get invoice history details for any invoice that the specific item was purchased on

Item Purchase History

Item number

Item Purchase History

Item Number: NKK66CC

Description: CPC E-78 ABLOY PROTEC KEYSTAMPED CPC, SERIES #SEQUENCE #, PRODUCT NO.

Inv #	Detail	Date	Qty	Unit Price	Extended
00084246	Details	4/28/2006	243	\$3.50	\$850.50
00084267	Details	4/28/2006	261	\$3.50	\$913.50
00084430	Details	5/8/2006	542	\$3.50	\$1,897.00
00084602	Details	5/17/2006	542	\$3.50	\$1,897.00
00084669	Details	5/19/2006	299	\$3.50	\$1,046.50
00084761	Details	5/26/2006	277	\$3.50	\$969.50
00084825	Details	5/30/2006	15	\$3.50	\$52.50

Access to the Item Purchase History function may be turned off if you wish.



eSamco Admin Panel – new members

Home Page Welcome Message

From your Admin panel (xxxxxx.eSamco.com/admin), you are able to write your own welcoming message. This is the message that appears on the home page underneath the 'welcome to [here], [customer name].

This is the welcome-to text., Joe Smith

Type your message, using
 for each line feed you desire. The entry window will automatically wrap after 40 characters, but the actual welcome message that displays is in a proportional font, so the wrap will depend not only on the content, but also the style you choose to use. (WWW takes more space than iii)

This is the message that MEMBERS to your site will see after they log in. What is written here is controlled by you.

When the typed message has been completed, click the [update message] radio button to update.

Generic Customer Cart Message

From your Admin panel (xxxxx.eSamco.com/admin), you are able to add a generic customer message that will appear to ALL customers when they click on [view cart]. Found to the left and below of the cart options of [save cart], [check out] and [empty cart], this message is displayed in a smaller font than the Home Page Welcome Message and uses a reverse colour scheme.

Type your message, using
 for each line feed you desire. The entry window will automatically wrap after 40 characters, but the actual welcome message that displays is in a proportional font, so the wrap will depend not only on the content, but also the style you choose to use. (WWW takes more space than iii).

When the typed message has been completed, click the [update message] radio button to update.

Customer (USER) SPECIFIC Message

From your Admin panel (xxxxxx.eSamco.com/admin), select the [customer] options (where you add new users). Select a specific user and click on the [edit] icon. At the bottom of the display is a section for entering in a specific message that will appear to ONLY that user after they first complete the login. This message will appear above the Home Page Welcome Message in RED and in the same font as the Home Page Welcome Message.

Type your message, using
 for each line feed you desire. The entry window will automatically wrap after 40 characters, but the actual welcome message that displays is in a proportional font, so the wrap will depend not only on the content, but also the style you choose to use. (WWW takes more space than iii).

This is a message specific to this login. No other user from this company will see this message. What is written here is controlled by you.



eSamco Admin Panel – new members

The eSamco admin panel is where you will set up your customer (called members) so that they may have access to their own information. Not all links are currently active, but reserved for subsequent releases.

Clicking on Customers and then Add New User will present this screen:

Home

User

User Name:	<input type="text"/>	* Required
Password:	<input type="password"/>	* Required <input type="button" value="Auto Generate"/>
Confirm:	<input type="password"/>	* Required

Personal

First Name:	<input type="text"/>	* Required
Last Name:	<input type="text"/>	* Required
E-Mail Address:	<input type="text"/>	* Required

Customer information

Customer #:	<input type="text"/>	* Required
Currency:	Canadian Dollar ▼	
Group:	Default ▼	
Warehouse:	ACI ▼	

Contact

Telephone Number:	<input type="text"/>	* Required
Position:	<input type="text"/>	

Options

Active:	No ▼
---------	------

<input type="button" value="add"/>	<input type="button" value="cancel"/>
------------------------------------	---------------------------------------

Username

The username is used as the customer log in. There are numerous possibilities to setting a user name. In these examples, we've used three different formats, each one of which is valid:

- nickname
- last name first name
- first name last initial

Password

Enter a password for the customer to use. The same rules apply to this password as for most other passwords in the computer age. Our recommendation is that it should contain at least 5 characters and contain both numbers and letters. A minimum of 4 characters is required.

Auto generate

Should you wish to generate a password for your client, click on the auto-generate radio button. A password with numerals and both lower and upper case letters will be generated.

Confirm

Re-enter the password as entered above. If you have used the auto-generate option, both the password and the confirmed password fields are populated for you.

First name / Last name

This can be an individual person; Steve / Jones, or a company name; Absolute Consulting (example). What is written here will be used to welcome your member to your site following their login, as in "Welcome to XYZ Company, Steve Jones".

Email address

Enter an email address associated with this customer or individual. This address is used to send order confirmations to your customer once an order has been successfully placed.

Customer #

This is the customer number from **POWER ACCOUNTING, ACCOUNTS RECEIVABLE → CUSTOMERS → ENTER.**

Currency

Please choose the home currency of the customer in question.

Group

Please choose the group which determines access for this customer. You will have decided this along with your eSamco Assistant earlier. It is the creation of these groups that allows you to restrict access to one or more of the functions described above.

Warehouse

If your company wishes to sell out of multiple warehouses, you will have set them up for access prior to setting up your members. The warehouse on the member record is the default warehouse for that user.

Telephone number

Enter the telephone number associated with this customer or individual.

Position























This is an optional field.

Active

The choices are only Y or N. See below for a discussion on members and guest.

[Home](#)

Add New Member

#	Username  	Customer #  	GRP  	Last Name  	First Name  	Created  	Active	Edit 	Del 	E-mail	Customer Specific Msg
1	samco	MP0375	Manager	Software	Samco	01/31/11	Y				
2	manager	SAMCO	Manager	Manager	Manager	01/27/11	Y				
3	admin	SAMCO	Administrator	Administrator	Administrator	01/27/11	Y				
4	orders	SAMCO	Orders	Orders	Orders	01/27/11	Y				

Members (active and non-active) / Guests

Members

Active members are your Power Accounting customers that have been set up as described above and have the active flag set to Y. Members are able to search for products, get their specific pricing, as well as purchase products. They can look up their history, get details on previous purchases, and view current orders awaiting completion. They can also create booking / recurring / standard orders, saving them for submission later on.

You may group together members by function, adding or removing the features or sections that were described above:

Account Management
View Current Account
View Account History
Make Payment On Account
Order Management
View Open Orders
Create New Order
Load Order
View my Web Orders
Invoice Management
View Invoice Details
Item Purchase History

Non-active members are Power Accounting customers that have been set up as described above and have the active flag set to N. When the user attempts to logs in they will be successful, but will only able to look up items. There is no discernable difference between a non-active member and a guest. However, all it takes to move a non-active member to being an active member is changing the active flag on their customer record in the eSamco/admin panel.

Guests

Guests may search for product, but they can only see the pricing that you have determined is available for viewing to the general public. This is usually a retail or MSR price.



eSamco Admin panel – Customer >> Orders

On your ADMIN PANEL, under the major heading of CUSTOMERS are sub-headings for Customers Orders Statistics.

Home > Orders

Your total sales of finalised weborders is \$1,234,567.89 (\$98,765.43 pending)

Order #	Customer #	Status	Method	Sale Amt	Created
WEB00010	Customer 1	Recently Submitted	On Account	\$ 611.71	06/11/07
WEB00009	Customer 2	Unsubmitted	On Account	\$ 9.05	06/07/07
WEB00008	Customer 3	Pending	On Account	\$ 67.68	06/07/07
WEB00007	Customer 1	Missing	On Account	\$ 272.25	06/07/07
WEB00006	Customer 1	Finalised	On Account	\$ 219.55	06/07/07
WEB00005	Customer 4	Pending	On Account	\$ 212.62	06/07/07
WEB00004	Customer 1	Cancelled	On Account	\$ 62.44	05/17/07

The entire page is listed by order number, with the most recent order being displayed first. All orders from the beginning are included, although the earliest of them may have detail as we were not tracking it at the very beginning. This page may not be resorted.

Order number

Order Details :	
Order # :	WEB00010
Status :	Recently Submitted Re-Check
Created :	2007-06-11 10:44:14
Customer # :	Customer 1
Web User :	Samco
Method :	On Account
Po #	
Shipping Address	Samco Software Inc #61-7789 134 Street Surrey, BC V2X 2M5
Last Update :	2007-06-11 10:44:38

Web Totals :	
Current Subtotal :	\$ 611.71
Order Subtotal :	\$ 611.71
Discount :	\$ 0.00

Samco Totals :	
Subtotal :	\$ 611.71
Discount :	\$ 0.00
Misc :	\$ 0.00
Freight :	\$ 0.00
Total Tax :	\$ 36.77
Total :	\$ 648.48

This display provides some of the information contained on the header or first page of the order within the Billing module of Power Accounting as well as the order totals, including tax and discounts that would be shown on the last page of the order in Power Accounting.

Also provided is the current status of the order. A list of the statuses and what they mean:

Finalized:

The order has been received into your Power Accounting system and completely processed, the invoice is found in Billing > Invoice History.

Pending:

The order has been received into your Power Accounting system and is waiting to be filled and invoiced. The order is found in Billing > Orders > Enter.

Recently submitted:

The order has been submitted to the Power Accounting system after the update at 4am. Click on Re-check to update the status for this particular order.

Missing:

The order failed to be found in the Power Accounting system. This could mean that the order was deleted once it arrived.

Unsubmitted:

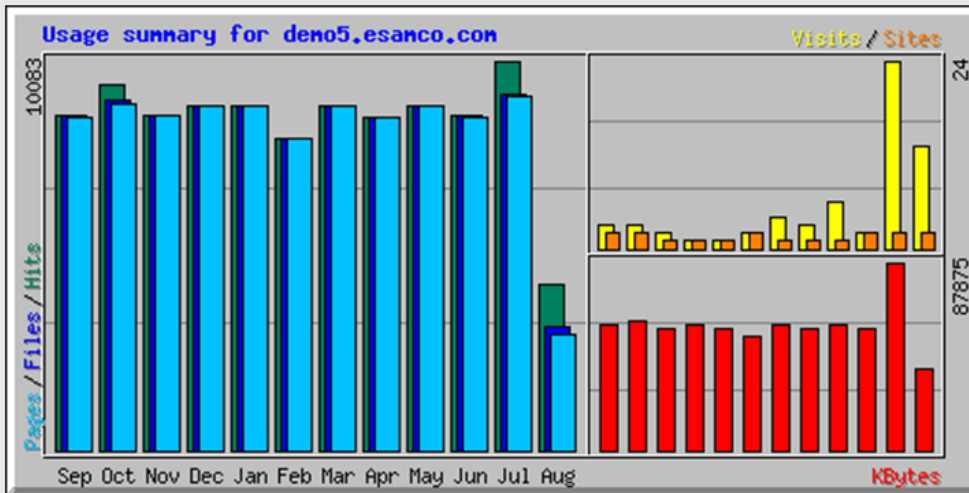
The order failed to leave the eSamco site. This could be due to errors on the order or a failure in the ftp transfer or as a result of the user leaving the site (using the X) prior to the transfer taking place.

As well, there is a link to recheck the status.



eSamco Admin panel - Statistics

Below is one sample of a statistics result, which contains colorful bar charts and detailed summary in a table sorted by month.



Summary by Month										
Month	Daily Avg				Monthly Totals					
	Hits	Files	Pages	Visits	Sites	KBytes	Visits	Pages	Files	Hits
Aug 2009	429	318	299	1	2	38143	13	2996	3186	4290
Jul 2009	325	298	296	0	2	87875	24	9176	9238	10083
Jun 2009	288	288	287	0	2	57318	2	8639	8649	8650
May 2009	286	286	286	0	1	58801	6	8893	8893	8893
Apr 2009	287	287	287	0	1	56900	3	8616	8616	8616
Mar 2009	287	287	287	0	1	58836	4	8906	8906	8906
Feb 2009	288	288	288	0	2	53437	2	8074	8080	8085
Jan 2009	287	287	287	0	1	57308	1	8915	8915	8915
Dec 2008	287	287	287	0	1	58988	1	8924	8924	8924
Nov 2008	288	288	288	0	1	57177	2	8652	8652	8652
Oct 2008	304	291	289	0	2	60972	3	8970	9047	9453
Sep 2008	288	288	288	0	2	59076	3	8642	8649	8662
Totals						704831	64	99403	99755	102129

Hits

Any request made to the server which is logged, is considered a 'hit'. The requests can be for anything... html pages, graphic images, audio files, CGI scripts, etc... Each valid line in the server log is counted as a hit. This number represents the total number of requests that were made to the server during the specified report period.

Files

Some requests made to the server, require that the server then send something back to the requesting client, such as a html page or graphic image. When this happens, it is considered a 'file' and the files total is incremented. The relationship between 'hits' and 'files' can be thought of as 'incoming requests' and 'outgoing responses'.

Pages

Pages are, well, pages! Generally, any HTML document or anything that generates an HTML document would be considered a page. This does not include the other stuff that goes into a document, such as graphic images, audio clips, etc... This number represents the number of 'pages' requested only, and does not include the other 'stuff' that is in the page.

Visits

Whenever a request is made to the server from a given IP address (site), the amount of time since a previous request by the address is calculated (if any). If the time difference is greater than a pre-configured 'visit timeout' value (or has never made a request before), it is considered a 'new visit', and this total is incremented (both for the site, and the IP address). The default timeout value is 30 minutes (can be changed), so if a user visits your site at 1:00 in the afternoon, and then returns at 3:00, two visits would be registered.

KBytes

The KBytes (kilobytes) value shows the amount of data, in KB, that was sent out by the server during the specified reporting period.

Sites

The 'sites' number shows how many unique IP addresses made requests to the server during the reporting time period.



eSamco ADMIN panel Removing Items or Categories

When you need to remove items from your esamco site, there are a couple of different ways to accomplish this, depending on the number of items involved:

Single Item

Go to each item using **IC >> ITEMS >> ENTER**, setting the flag on the second page called Allowed on web to N

43. Allow on web ?

PgUp, F5 = mrgn, F6 = notes, F7 = status, ShF5 = Vndltm,
Field number to change ?

Multiple items (category/sub-category)

If an entire sub-category or category of items is no longer to be displayed or available on your esamco site, the flag called Allowed on website can be set to N, thus removing all items within that category. The same flag is available for sub-categories.

Setup
Category codes (Enter)

* 1. Category code

2. Category description

3. Allowed on website ?

Multiple items (range of items)

If a whole range of items is being removed, setting the same flag on each item can take a very long time. If you have a way to group these items then there is a function that will accomplish the same thing for you. Go to **IC >> F2 >> FILE UTILITIES >> SET ITEM FIELDS**, define your test and set the flag to N:

Start item #

Options: Enter an item number
[?] to select from the Find item pop-up window
[F1] for "First"

End item #

Options: Enter an item number
[?] to select from the Find item pop-up window
[F1] for "Last"

When field 'Equals this'

Use these fields to refine the selection of items (optional). For our example, when Stock Code is equal to I, select the item.

Inventory control account	Barcode multiple	Mark-up code
Sales account	Vendor-item	Allowed on web flag
Expense account	Vendor number	** Stock code **
Credit-memo account	Category	Price list flag
Liability account	Sub-category	Currency code
Discount account	Price code	
Barcode single	Commission code	

Once you select the field, enter the value that the field must have before anything can be changed. When you are finished entering the selection criteria, or to bypass the selection criteria, press [TAB] at *When field*. If you do not enter selection criteria fields/values, the item or range of items that you entered will be changed regardless.

Change field 'To this'

Use these fields to specify which field is to be changed and the value that it is to be changed to. For our example, change field *Allowed on web flag* to N.

Inventory control account	Barcode single	Price code
Sales account	Barcode multiple	Commission code
Expense account	Vendor-item	Mark-up code
Credit-memo account	Prime vendor	** Allowed on web flag **
Liability account	Category	Stock code
Discount account	Sub-category	Price list flag
		Currency code

To end entry of the new value(s), press [TAB] at *Change field*.

File utilities
Set item fields
ACME SUPPLIES LIMITED

1. Start item # "First"
2. End item # "Last"
3. Stock code When-field I Equals-this I
4.
5.
6.
7.
8. Allowed on web flag To this N
9.
10.
11.
12.
13.
14.

Field number to change ?

In either case, once the flag on the item has been set to N, go to the main menu, select **WI >> UTILITIES >> LOAD CAT/SUBCAT RELATIONS** and run it. Double check the results by going back one level to choose **CATEGORY / SUB-CATEGORY LINKS**. The arrow up and down will help you see all of the active cats and sub-cat combinations that appear on your site.

NOTE: BLANKS are not allowed. If you see them - delete them. You will need to add the cat/sub-cats to the item record later on.

After these steps have been done in the software, go to yourcompany.esamco.com/admin on the web. Click on the **Update Categories Now** radio button and the job is complete.

Update Categories Table

Update Categories Now

**You can update the live version immediately
OR you can wait until it is put in effect automatically at 2am (PST) Pacific Time.**



eSamco Additional Features

Error Reporting

If there are errors on the order attempting to submit to the accounting software, a message to the client will be displayed. The items in the cart will remain in the cart, so your customer will not have to worry about losing their order. You are the administrator mentioned in the message:

There are some errors in your cart. Please contact your administrator with the following information:

<error as reported from the accounting software>

Some of these errors may be:

- Invalid item (the item entered is incorrect, or the item entered was previously deleted)
- Item not stocked at this warehouse (add the status record)
- Ship-via not on file (check the customer record for the SHIP-VIA field)

Type of Order

Valid types of order coming into the Power Accounting system are [O]rder, [I]nvoice, [H]old and [Q]uote. If you wish to use a different type for orders coming from the web than you do for orders placed directly into the accounting software, please contact your eSamco Assistant.

Credit Card Processing

If you wish to begin offering your clients the option of paying for their purchase at the time of the order and/or the ability to pay their account on line please contact sales@samco.com or Barry Clarke at 1-888-LV-SAMCO (1-888-587-2626) or 1-800-663-2080. While the eSamco system is capable of that feature, it is as an add-on option with a one-time configuration fee.

Line item comments (each line)

When viewing the cart, your client is able to add comments to each line item. The comment column appears to the right of the description. Click on the Add to start entering the comments. There are 9 lines of 50 characters available. When done, click on save.

Once a line comment has been entered, the add link changes to edit. The first 20 characters of the first line of comments, and the first 8 characters of the second line of comments are displayed.

In Power Accounting, please go to **BILLING (OE) F2 → SETUP → CONTROL INFORMATION**. Page down 4 times. Change the field called Use additional description to [Y] and the following field called Length of Additional description to [50]

Should you require your Billing (OE) forms to be altered to utilize this new feature, please advise us at support@samco.com. This service will be included as part of your monthly maintenance.

Order comments

During checkout, there are 5 lines of 30 characters available as an order comment. These are the comments that appear on the last page of an order in the Power Accounting system.

Should you require your Billing (OE) forms to be altered to utilize this feature, please advise us at support@samco.com. This service is included as part of your monthly maintenance.

Courier account number

During checkout, the ship-via from the customer record (**AR → CUSTOMERS → ENTER**) is automatically displayed. A new field has been added on the eSamco site for the courier account number, which will take its information from the Courier Account #, also from the customer record.

If the shipping method is changed during checkout, then the courier account number field will be blanked out and is available for entry.

Processing note:

In order to avoid errors during order submission from the eSamco site, please remember that you must get a list of customers attached to a particular ship-via code before you delete it, and assign those customers to a new ship-via code.

View invoice details – reprint invoice

For some browsers, in order to have the printout most closely resemble an invoice, some settings will need to be completed.

On your customers' browser, have them:

- Click on tools and select internet options from the available menu.
- Click the advanced tab
- Scroll down until the printing options are displayed
- Check the box for print background colours and images
- Click on OK to apply the new setting

Once the desired invoice is displayed from any of the available options, the user will simply click on the printer icon on the task bar or use the menu file > print option.

Pagination

From your ADMIN panel (your site.eSamco.com/admin) you can choose the number of items to show on a page. To activate a new setting (the current and default is 20 items per page) key in the desired number and click on the associated icon to finish.

Sorting

When displaying current or historical account history, your clients will be able to clearly see which columns are available for sorting, as red up / down arrows have been added for this purpose.

Instructions

Click on the displayed up or down arrows to re-sort the items on display

Upload images/PDF files

From your eSamco/admin page, you are able to upload item images and pdf files on your own. However, if you have more than 20 images to upload, it may be easier for you to email them to your eSamco Assistant or burn them to a CD and send that to #61 – 7789 134th Street, Surrey, BC. V3W 9E9

Rules

Each image must be a .jpg file

Each image file must not be more than 500kb in size.

Each image name (as is the rule now) must exactly match an item number that already exists (or will exist) in your Power Accounting system.

You may upload both .jpg and .pdf files, but not within the same batch.

Enter in the full path of the image file you wish to upload to your eSamco page, or use the browse radio button to search your system for the file. When done, click on the update file(s) radio button.

Hide Costs

In the Advanced Search area, the flag for [hide costs] {responses are: ON (hiding costs) and OFF (not hiding costs)} automatically refreshes the display, rather than waiting for the user to click on [search]. This feature is for those of you that show not only the retail price, but your customers' pricing as well, and have the circumstance where your customers are showing the eSamco screen to their customers. The retail price remains displayed and your customer's cost is hidden.

The cost is hidden until your customer clicks the option off again.



eSamco Administration Features

Customer Setup Page Sort Options

From your Admin panel (xxxxxx.eSamco.com/admin), select the [customer] options (where you set up new users). Columns that are available for sorting (up or down) are: user name, customer number, last name, first name and date created. They are clearly indicated with large arrows.

Who is Online?

From your Admin panel (xxxxxx.eSamco.com/admin), select the [users online] options (located under Tools) to display information regarding the users currently visiting your eSamco site. The member / user name, customer number, IP address, browser information, location and date are displayed. Columns available for sorting are clearly marked with large red up and down arrows.

A column showing an ID is also displayed, and the location column will display the page that the user is currently looking at – these are both for support purposes.

Waybill and Courier/Courier Account

In the View Open Orders, View Current Account, View Account History and View Invoice Details links, the waybill#, courier and courier account number from the order/invoice will be displayed. These are fields that previously only displayed the defaults from the customer record, but now come from the historical record of the invoice.

Suspend operations message

From time to time, it may become necessary to lock out your users, perhaps if you have done a lot of changes to categories and sub-categories and want to update the site. Another instance is when we update the programmes and scripts that run your .eSamco site.

For those times a suspension of service is required, this new option on your admin page allows you to type in a message that will appear when users attempt to access your site. When the work has been completed, come back to the admin page and remove the message. Your site will return to normal.



eSales Information

Overview

Allows sales reps to log into any of their own customers' accounts and perform all the same functions as the customer himself. This is an optional feature. Please contact your sales rep for information and pricing.

Power Accounting requirements

Sales Reps must be in use. Go to **ACCOUNTS RECEIVABLE → F2**. If Sales Reps is NOT on the menu, choose **SETUP → CONTROL INFORMATION** and make the appropriate changes. See your Accounts Receivable manual or the on-line help for further details on setting up Sales Reps.

Once Sales Rep numbers/codes have been created, assign the sales reps to their customers in **ACCOUNTS RECEIVABLE → CUSTOMERS → ENTER**.



Information available for sending to your clients

Once you have been activated as a member, please review this information which should assist you in moving around your supplier's site. These are basic step by step instructions for completing an order. Some features may not be activated as they are custom. Please contact your supplier for further information.

Some rules:

You may log into the site from any location, but may only be logged in once from the same location.

If you require more than one person to be logging in from a single place of business, please request a separate username and password for them.

Please remember to log out when you are done, especially if you intend to log in later from someplace else.

As with any other password, please keep your password private.

You may search for items using the simple search at the top of the screen on the home page, the categories and subcategories, or the more advance search available once a specific category has been selected.

Navigating from the home page