Portal Prodigy™

Items and Product Catalog Feature in Detail

Chapter Excerpt from Software User & Administration Guide
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www.portalprodigy.com

1.1 Introduction

Feature, display, demonstrate and sell your organization's products online. Define an unlimited number of product categories and hierarchy of sub categories. Enter detailed descriptions, categorize products, display pictures, setup inventory and selection by colors and sizes, enter initial inventory quantities, attach full featured multimedia product brochures, and track inventory manufacturer, purchasing and cost information.

Product Catalog feature benefits include:

- Ability to create online shopping catalog storefront, complete with categorized product pages, product search feature, shopping cart, shopping cart viewer, customer registration, online order entry, online payment entry, real time online credit card approval, automated emailed copy of order, and more.

- Provides the customer with a feature rich shopping experience that includes the ability to search for products using keywords; browse products by categories; access products via direct links from documents and brochures; from highlighted specials displayed on the site's home page; by direct links from targeted email broadcasts sent by PORTALPRODIGY; and by browsing a colorful online product catalog.

- Shopping features are fully integrated with the back office features such as Inventory Control, Order Fulfillment, and Payment Processing.

- Stores the details for each Product or Service that your organization offers as an Item record in an Items table for easy administration update.

- Select from a variety of data elements for describing products and services; including narrative description, pictures, brochures, classifications, and keyword categorization.

- Highly customizable product view pages including placement, color schemes and image management.

- Attach brochure documents or digital demonstration files such as video to specific items.

- Designate relationships between main products and accessories to push up selling.

- Products & Services are automatically formatted into sleek Product Catalog without user intervention required. An Advanced Product Catalog feature can be enabled to provide full control over your Product Catalog including many advanced features.

- Customize customer registration forms to collect the information required by your organization.

- Administrators can display special promotion items from catalog in the home page mini-browser with a simple click.
- Classify products by gender, name, accessories, product codes, manufacturer, vendor, brand, quantity, color, models, sizes, etc.
- Manages purchasing and reorder information.
- Implement Average Cost, Specific Cost, LIFO or FIFO costing methods.
- Automated promotion and reminder broadcasts capability for consumable and recurring order items.
- Complete terms management facility for payment periods, grace days, discount days, discount rates, etc.
- Quotation feature allows customers to submit RFQ for specific items. Includes back-office system for pricing RFQs, automated creation of quotes, emailing quote to customer, online acceptance, and automated conversion to Order.
- Online bidding feature allows you to offer and accept bids for items.

Some of the components, fields and settings of the Orders feature, discussed in detail in this chapter, are:

Search for Product Items page:
Feature:
All
Ad
Event
Exchange
Membership
Press Release
Product
- Classification:
- Product ID:
- Gender:

Product Name:
Accessories:
- Include
- Ignore
- Limit To
- Exclude

Product Code:
Consumables:
- Include
- Ignore
- Limit To
- Exclude

Manufacturer:
Vendor:
Brand:
Display in Mini Browser:
Created Date Range
Modified Date Range –
Product Type

Product & Inventory Feature Management page:
Initial Inventory Entry
Prompt Customer for Partial Shipment
Display Out of Stock Items
Always Show First Level Categories (SM Only) .
Default Product Image
Product Brands
Product Classifications
Product Types
Unit Types
Detail Categories
Cost of Goods Sold
Inventory Account
Inventory Adjustments
Purchases
Receivables Account
Revenue Account

Product Brands Management page
Description:
Active:

Product Classifications Management page:
Description:
Active:

Product Types Management page
Description:
Active:

Unit Types Management page
Description:
Active:

Product Details Category Management page
Description:
Sort Order:
Display Section:
Below Product Name
In Product Details
- Include in Search
- Include in Sort
- Active:

Item Management page

Item Description:
Feature:

- Event
- Exchange
- Membership
- Press Release –
- Product
  - Item
  - Service
  - Discount
  - Adjustment

Item ID:
Product Description:
Product Name:
Product Code:
Product Type
Manufacturer:
Manufacturer Model Number:
Manufacturers Product Code:
Colors:
Long Description:
Price:
Cost:
Product Sub Type:
Unit Type:
Shipping Weight:
Costing Method:

- Average Cost
- Specified Cost
- LIFO
- FIFO -

Sizes:
Options:

- Taxable
- Inventory
- Limit Order to Qty on Hand
- Display in Mini Browser

GL Accounts:

- Cost of Goods Sold:
- Inventory Account:
- Inventory Adjustments: .
- Payables Account:
- Revenue:

Purchasing:

- Preferred Vendor:
- Preferred Vendor Product Code:
- Avg. Reorder Frequency
- Minimum Reorder Quantity:

Product Details:

- Category/Label:
- Keyword/Value:

Instant Publishing:
Descriptions:

- Update Large Picture:
- Update Small Picture:
- Resize to Fit?
- Gender:
- Brand:
- Classification:
- Price Rating:
- Quality Rating:
- Value Rating:
- Accessory:
- Consumable:

Brochure:
Other:
Responsible Group:
Created By
Modified By .
Active
ChapterID
Topics
Inventory -
Inventory Management:
Sub Code
Mfr. Sub Code
Color
Size
Qty On Hand
Qty Committed
Qty Committed BO

Terms Management page

Description
Net Days
Grace Days:
Discount Days
Discount Rate:
Active

Products Catalog Management page

Category Name:
Short Description:
Long Description:
Update Image:
Sort Order:
Show Category Image On:
Product Listings:
Product Page's View:
Show Products List:
Show Products List Background:
Show Product's Image:
Show Product's Name:
Show Product's Code:
Show Product's Colors:
Max Products in a Row:
Max Rows with Products on a Page:
Max Product's Colors in a Row:
Sub Categories List Alignment:
Products Category:

- Category Name:
- Short Description:
- Long Description:
- Picture:
- Update Image:
- Sort Order:

Copy Category Options:

- Copy All Sub Categories:

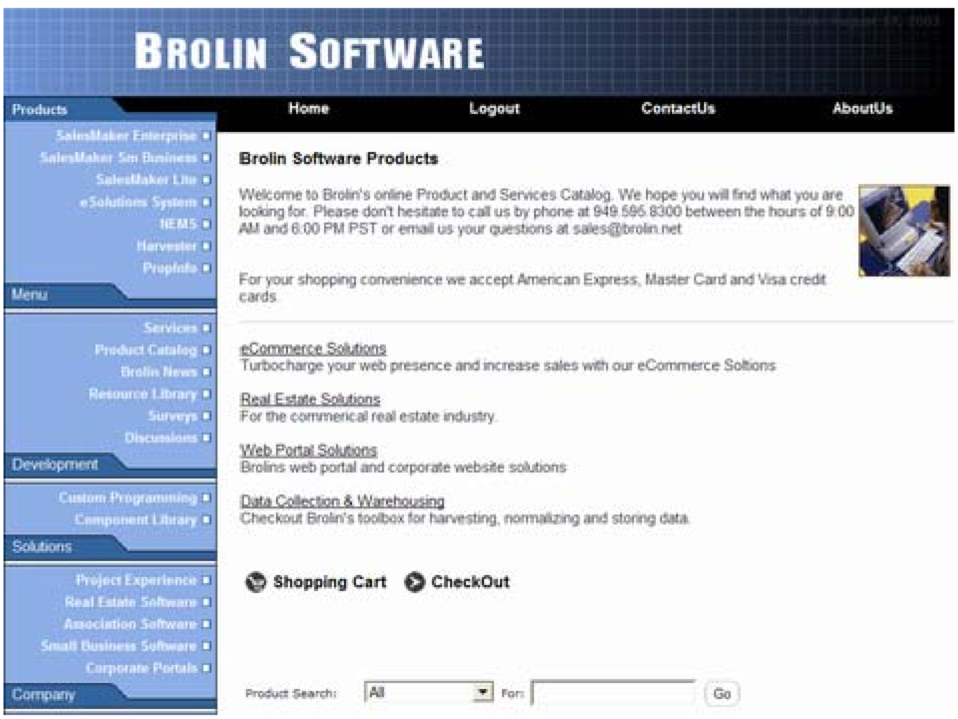
Copy Products:

1.2 The Customer Experience

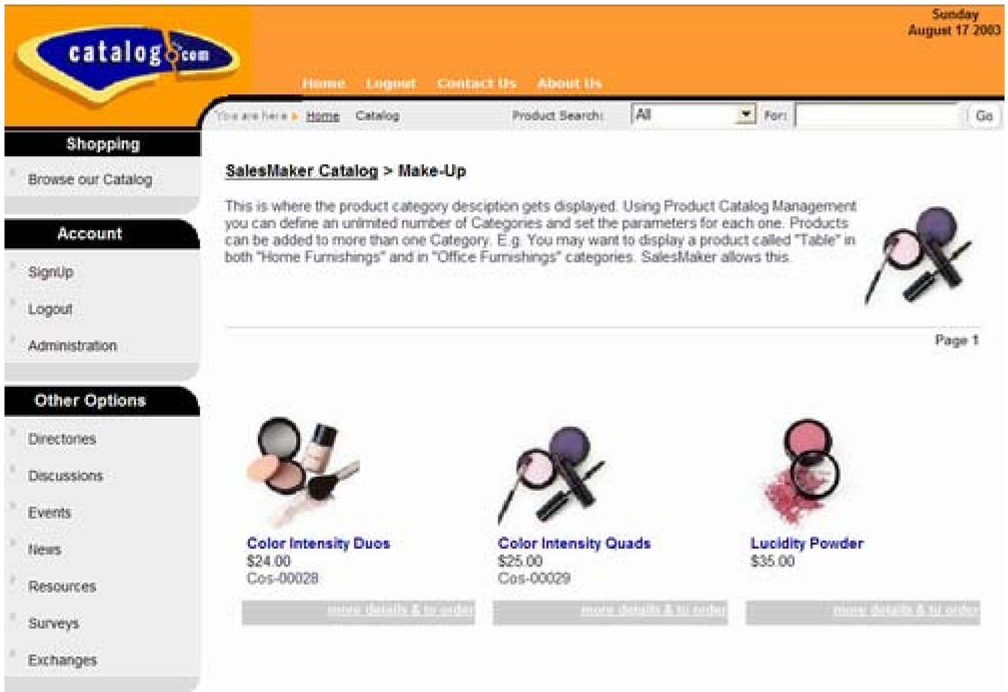
The customer experiences Items via the Shopping Catalog and various Feature Components such as Event Registration. For a detailed description of experiences outside the Shopping Catalog, see the Chapter for the applicable Feature Component.

PORTALPRODIGY provides the customer with a feature rich shopping experience that includes the ability to search for products using keywords; browse products by categories; access products via direct links from documents and brochures; from highlighted specials displayed on the site's home page; by direct links from targeted email broadcasts sent by PORTALPRODIGY; and by browsing a colorful online product catalog.

Product Catalog page Example 1:



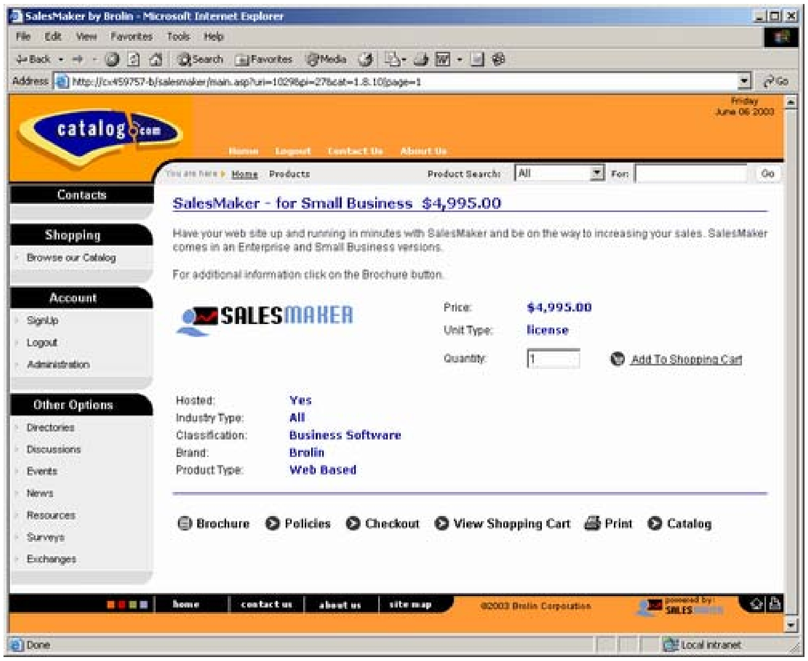
Product Catalog page Example 2:



1.2.1 Viewing Product Details and Adding Items to Cart:

From within the Shopping Catalog the customer simply clicks on the Product 

name, the image, or the more details & to order to display the Product Details page. The Product Detail page provides a description of the product along with an image, pricing and purchase options. If applicable the user may select sizes and colors. To purchase an item, the customer clicks on Add to Shopping Cart. If the customer is not logged into the site they will be prompted to login or Signup. PORTALPRODIGY provides a Quick Registration form builder so you can customize the registration form. When the customer is finished shopping, they select Checkout to finalize their purchase.



1.2.2 Checkout Process:

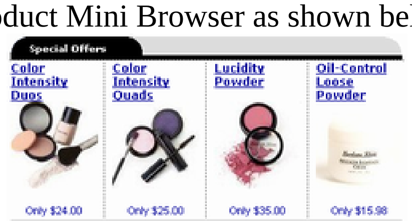
Once the customer has initiated the checkout process there are five major steps or pages for them to complete. They are:

Step 1: Enter Billing Information
Step 2: Enter Payment Information
Step 3: Enter Shipping Information
Step 4: Order Approval
Step 5: Order Receipt

Upon completion of the process, the customer will receive a copy of their order by email.
See the Tutorial section of this Chapter for a detailed explanation of how to use the checkout process.

1.2.3 Product Mini Browser:

PORTALPRODIGY provides the ability to promote products on you Website's Home page using the Product Mini Browser as shown below.

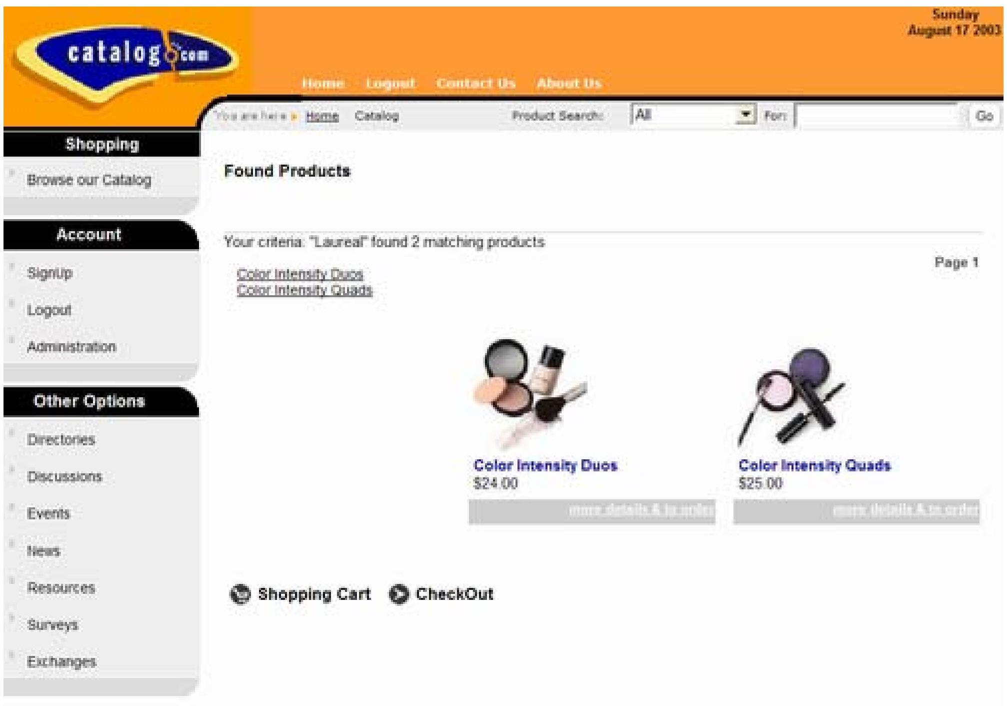


Customers click on a product title to display the product's Product Detail page.

1.2.4 Product Search:

The Product Search feature is displayed on the Home page and all Shopping Catalog pages. The customer may use it to search for products.

The results are displayed as shown below.



Product Search is configured by a permitted Administrator by first using Product Detail Categories Management to define Product Categories, then using Items Management to enter keywords for each Product.

Product Search ignores dashes, slashes and periods, thus customers may enter Product Codes (Part #s) with out without such symbols.

1.2.5 Product Detail page:

The Product Detail page provides a description of the Product including a narrative description, picture, price, size and color options, link to view a product brochure, order quantity, and an option to add the Item to the customer's shopping cart.

1.2.6 Saving Items in Shopping Cart for Future Use:

This feature allows the customer to create an order over time without losing the items in their cart due to session time-out. The customer can save the items in their shopping cart by clicking Save Cart option.

When the customer selects View Cart they will be given the option to remove previously saved items as shown below.

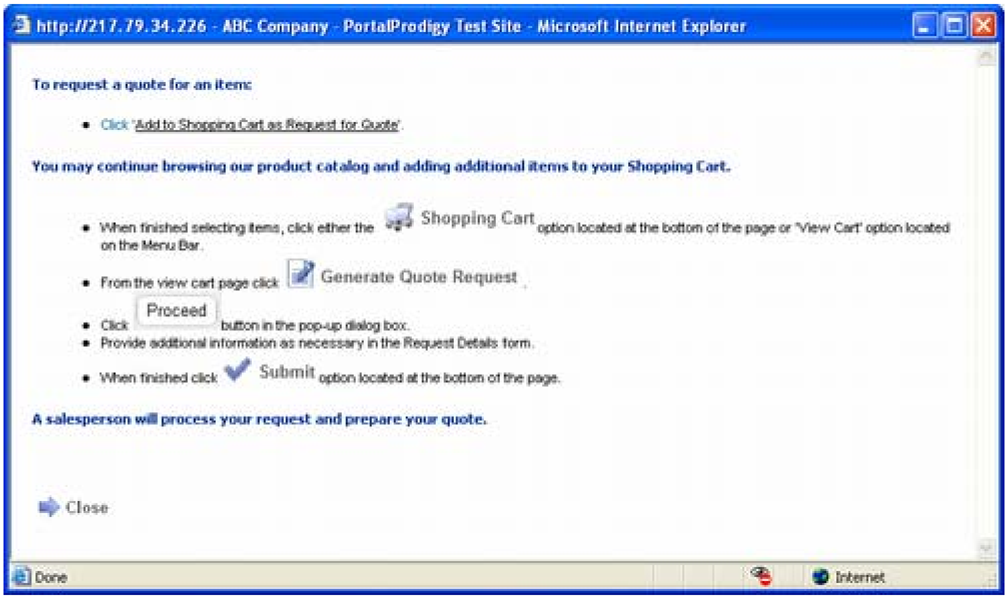
This is especially useful for customers creating large orders.

1.2.7 Request for Quote for Product Catalog Items:

This feature allows customers to request a price quote for items listed in your Product Catalog that have their Pricing Method set to "Request Quote". For such items your Product Catalog will display the words "Request Quote" in lieu of a price.

The same thing is displayed in the Product Detail page.

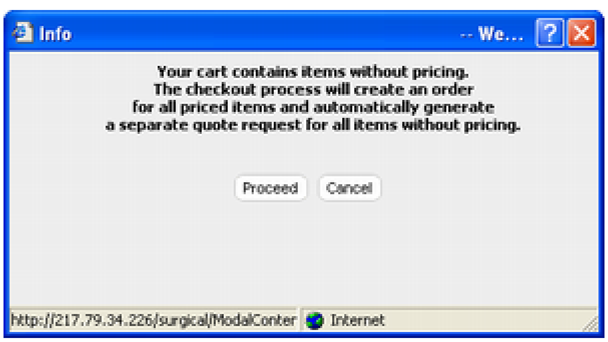
If the customer clicks on the Request Quote link in the Product Detail page, it will provide them with instructions how to Request a Quote. The instructions are shown in a pop-up window.



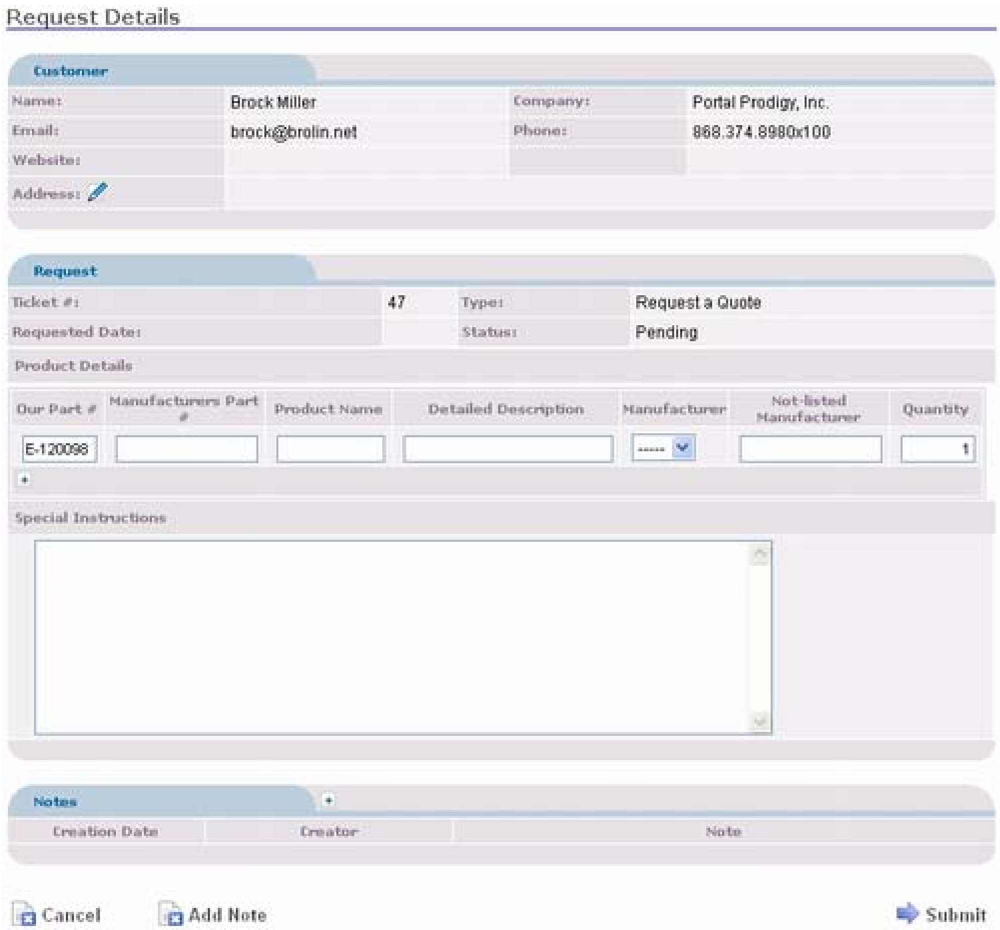
To request a quote for an item, the customer clicks Add To Shopping Cart as Request for Quote.

The customer may continue browsing your product catalog and adding additional items to their shopping cart.

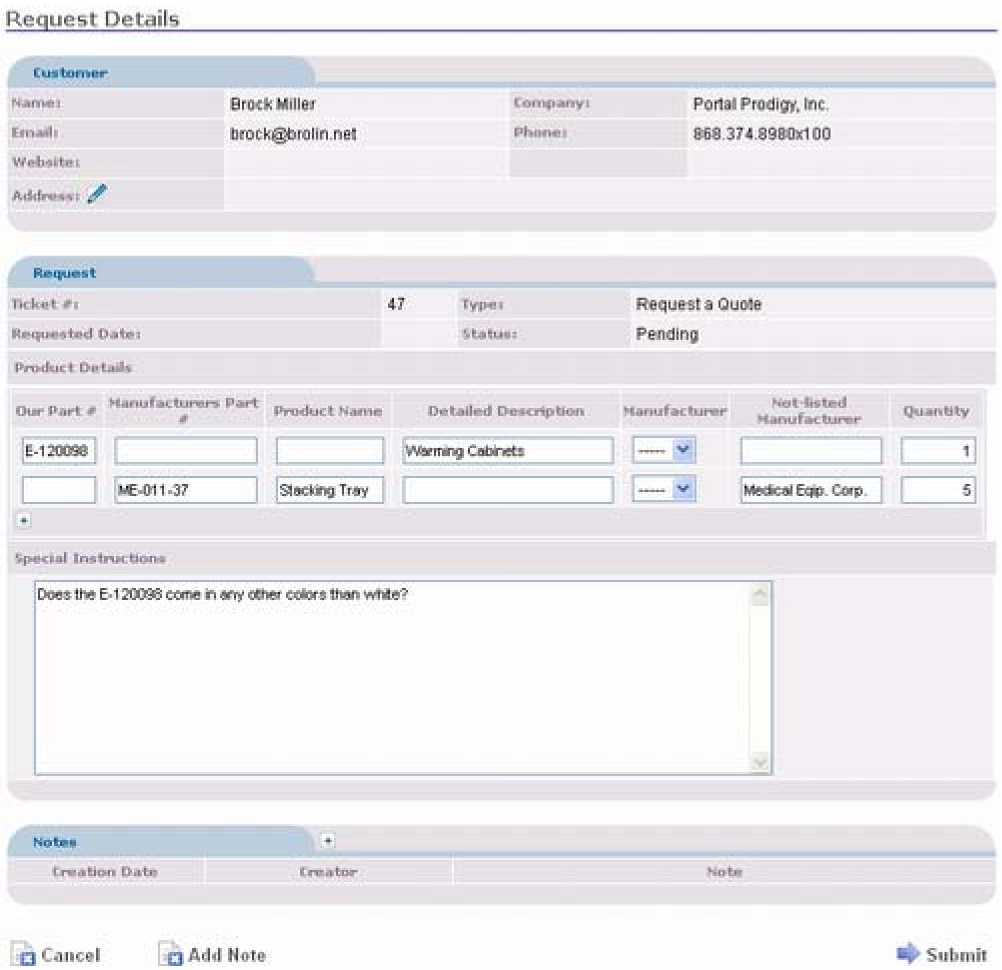
If the user clicks Checkout and there are items in their cart with Pricing Method set to "Request Quote" they will be prompted as follows:



If they click Proceed they will be taken through the normal checkout process for Items in their shopping cart with Pricing Method set to "Specified Price". They will then be taken to your Request For Quote form similar to the one shown below:



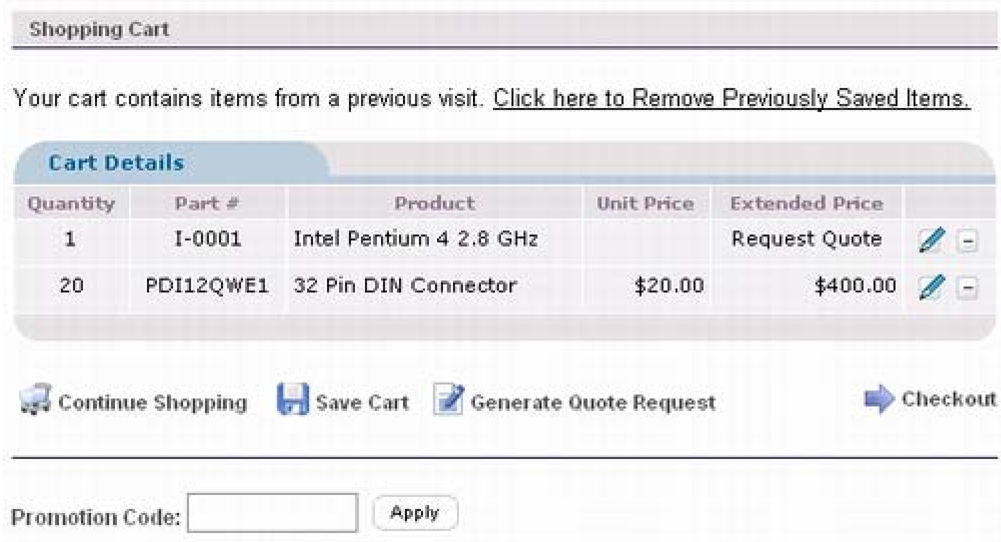
The customer will complete the form. They may manually add additional items like in the example shown below:



When finished the customer clicks Submit. The customer is assigned a Ticket # for their RFQ as shown below.

If you configured the RFQ to send a User Confirmation, the customer will receive it my email. It can contain a link back to your Website that will allow them to view the status of the RFQ including viewing the resulting Quote once it has been created, and approving the quote and completing the order process.

During the shopping process, if the customer clicks **Shopping Cart** or any other View Cart option and their Shopping Cart contains items with Pricing Method set to "Request Quote", the Shopping Cart page will include the **Generate Quote Request** option as shown below.



If the user clicks the Generate Quote Request option they will prompted with the following message:

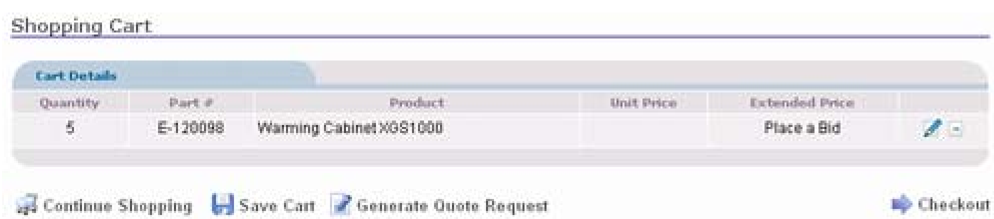
This message instructs them that clicking the Proceed button will generate a quote request for all items in their cart including items that are priced. In further instructs them that may click Cancel then click the Checkout option to place an immediate order for all items in their cart that are priced and to separately generate a quote request for items without prices.

1.2.8 Place a Bid for Product Catalog Items:

This feature allows customers to submit a bid for items listed in your Product Catalog that have their Pricing Method set to “Place a Bid”. For such items your Product Catalog will display the words “Place a Bid” in lieu of a price.

The same thing is displayed in the Product Detail page.

If the customer clicks on the **Place a bid** link in the Product Detail page, it will provide them with instructions how to place their bid. The instructions are shown in a pop-up window. The remainder of the process is the same as the Request for Quote process.



See the previous section of this chapter titled Request for Quote for Product Catalog Items. The only exception to the process for customer's place a bid is that they will enter their bid amount for each item in the Request for Quote form.

1.3 Components

The following components are used to create and manage items and the items/product shopping catalog.

1.3.1 Product & Inventory Feature Management page:

The Product and Inventory Features Management page is used to configure universal options and settings for the Product and Inventory feature.

Feature Options section:

- **Initial Inventory Entry** – used to allow direct setup of initial inventory quantities. This should be set to "Off" once the initial inventory setup has been completed. Default setting is "Off". Changing the values causes a warning prompt to be displayed.
    - **On** – allows inventory quantities to be entered directly into Item/Product Management and does not create GL Journal Transaction entries.
    - **Off** – requires inventory quantities to be entered and adjusted via either: Inventory Entry, Fulfillment, or Inventory Adjustment pages, which create GL Journal Transaction entries.
- **Default Costing Method** – used to set a default value when a new Item record is created. You can leave it set to blank or chose one of the following:
    - **Average Cost** – used to value inventory of the Item at the average cost of the Item.
    - **Specified Cost** – used to value inventory of the Item at the cost entered in the Cost field for the Item record in Item Management.
- **Display Out of Stock Items** – default setting is "Yes".
    - **Yes** – causes inventoried Items with Quantity on Hand of zero to not be displayed in Product Catalog.

  - **No –** causes inventoried Items with Quantity on Hand of zero to be displayed in Product Catalog. When a customer orders an Item that is not in stock, PORTALPRODIGY will prompt customer with notification that item is not in stock and provides option to accept backorder or to remove from their shopping cart.

- **Prompt Customer for Partial Shipment –** used to turn option on/off. Default setting is "No".

  - **Yes –** causes prompt to be displayed during Shopping Checkout process that asks Customer if they will accept partial shipment. If the customer selects "No", PORTALPRODIGY will require complete fulfillment of all of the Order's Items before the order can be shipped.

  - **No –** turns prompt off and allows Orders to be partially shipped, creating a backorder for the unshipped Items.

    Note that for each Item, you can Limit Orders to Qty on Hand using setting in Items Management.

- **Display List Price on Product Detail Page? –** if you want customers to see the List Price in addition to your Sales Price, set this to "Yes"; otherwise leave it set to "No".

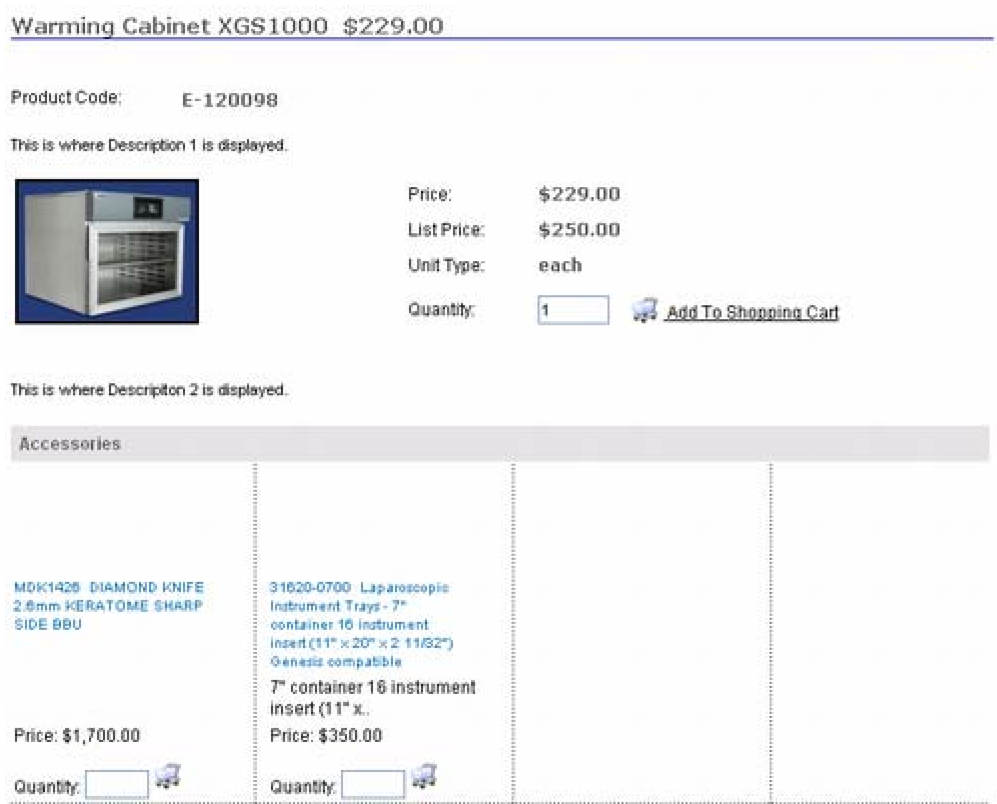
- **Enable Advanced Product Catalog –** set this to "No" only if you have a really simple product line and you do not care to control how your product catalog is displayed; otherwise set to "Yes". Setting to "Yes" enables the Product Catalog option on the Site Administration Menu. The Product Catalog gives you the ability to define your product categories and how your products are displayed.

- **Enable Place a Bid Pricing Method –** set to "Yes" to turn on the Bid Pricing feature. When Bid Pricing is enabled "Place a Bid" is included as one of the Pricing Method selections in Item Management. Bid Pricing allows customer to submit bids for items in your Product Catalog. Leave set to "No" to disable Bid Pricing.

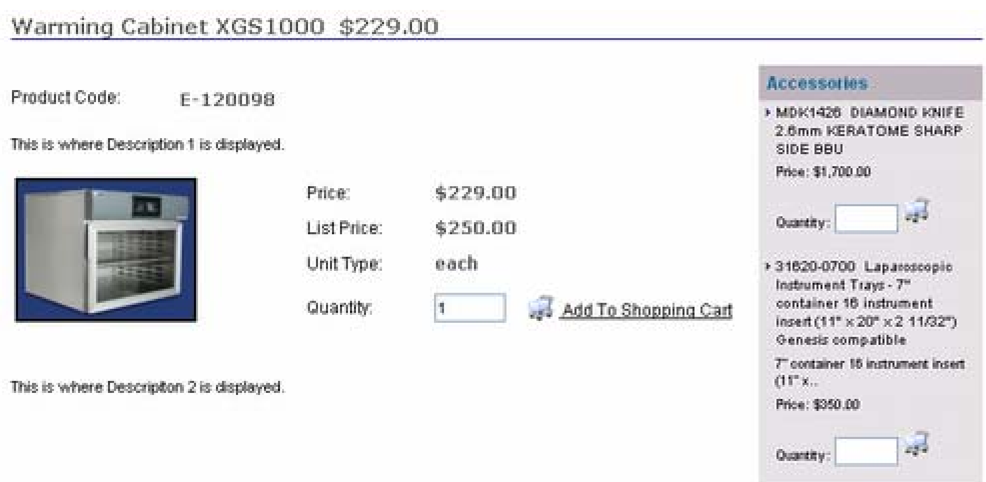
- **Enable Request a Quote Pricing Method –** set to "Yes" to turn on the Request for Quote (RFQ) feature. When Request a Quote Pricing is enabled "Request Quote" is included as one of the Pricing Method selections in Item Management. Request a Quote Pricing allows customer to submit a RFQ for items in your Product Catalog. Leave set to "No" to disable Request a Quote Pricing.

- **Display Related Item Section –** use to specify where Related Items are displayed on the Product Detail page. Related Items are used to generate add-on-sales, cross selling, and up-selling. The following choices are available:

  - **Below Product Detail –** displays the related items in the location shown below:



- o **Right Sidebar** – displays the related items in the location shown below:



- **Default Products Image** – you may load an image here that will be displayed in the Product Catalog and Product Detail pages when no image has been loaded in Item Management for the Item. Click Browse... to load an image file from your computer. Once an image has been loaded it can be deleted by clicking Remove Image option.

- **Manage** – click on any of the following links to display the management page for that data type:

- **Product Classifications** - create list of available Classifications that can be assigned to Items using Item Management. Example values: `Clothing, Gifts, Books, & Stationary.`

- **Product Types** - create list of available Types that can be assigned to Items using Item Management. Example values: `T-Shirts, Sweat Shits, Hats, & Sports Shirts.`

- **Unit Types** - create list of available Unit Types that can be assigned to Items using Item Management. Example values: `Each, Box, Dozen, & Hour`.

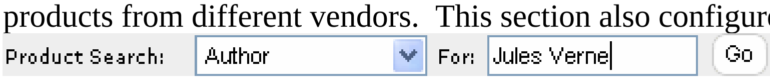
- **Price Groups** – create Price Groups that can be assigned to customers. Price Groups are used to assign special pricing, including volume pricing. Examples values: `Reseller Tier 1, Reseller Tier 2,& Preferred Retail Customer.`

- **Brands** – create list of available Brands that can be assigned to Items using Item Management. Example values: `Nike`, `Ralph Lauren`, & `DK&Y`. Also used to create Comparable Brands.

- **Related Document Types** – create a list of Types that can be used to categorize related documents. Example values: Brochures, Warranty Information`, & White Pagers`.

- **Related Item Types** – create a list of Types that can be used to categorize related products. Example values: `Accessories, Customers that bought this also bought, & You may also want to consider`.

Item Comparison section:

This section is used to set up a special page for searching and displaying comparable products. E.g. the customer could use this page to enter a competitor's product code (part#) to find your comparable product; or the customer could use it to locate an alternative product when the one they are looking for is not available; or the customer could use it to compare pricing of comparable products from different vendors. This section also configures how the standard Product Search 

is used for finding Comparable Products. You should create your Comparable Brands after configuring this section.

- **Comparison Products Section Title** – enter the label that you want displayed on the Product Detail page when listing Comparable Products.

- **Comparable Product Search Page Title** – enter the page heading that you want displayed on the Comparable Product Search page. This is a page that customers can use to enter competitors product codes and manufacturers product codes to find your equivalent products.

- **Search Label –** enter the label you want displayed for the search criteria text box on the Comparable Product Search page.

- **Comparable Product Search Page Instructions –** enter instructions or any other information that you want displayed on the Comparable Product Search page. You may enter them as text directly into the memo field or you may click to create them using the HTML editor.

- **Naming Method for 'Product Code' Search Category –** this is used for controlling Product Search. It allows you to control how Product Detail Categories for the Product Code of Comparable Products get listed in your Product Search. Product Search is comprised of a Product Detail Category list box and a text box. The Product Detail Category list box allows the customer to limit their search to a selected category such as "Brands", "Product Code" and "Product Name". E.g. for Comparable Products you may want customer to search for them listed under the category "Product Code" which is the same category used by your other products; or you may want to specify a category such as "Comparable Product Code"; or you may want to create unique categories for each of your competitors brand's such as "IBM Product Code", "Microsoft Product Code", "Oracle Product Code, etc. The naming choices are:

    - **Use Existing Product Code Category –** choose this setting to use the category "Product Code" for searching for Comparable Product Codes.

    - **Create Category using Search Category Name –** choose this setting to use the category entered in the Product Code Search Category Name field as shown below.

    - **Create Category by Appending Brand Name to Search Category Name –** choose this setting to have the system automatically create a category for each new Comparable Brand that you create. E.g. for the comparable brands "Apple", "IBM", Microsoft", and "Oracle" it will create the following categories: "Apple Part #", "IBM Part #", "Microsoft Part #", "Oracle Part#", etc.

If you plan to use this setting select it prior to creating your Comparable Brands. When you save a new Comparable Brand the system automatically creates a Product Detail Category for the Comparable Product Code based on the settings in this section. When you change the settings, previously created Product Detail Categories will need to be manually changed. This can be done by clicking on the Detail Categories option located in the Product Detail Options section of this page.

- **Comparable options for Brand, Product Code and Price**:
  - **Label** – enter the label that you want the customer to see.
  - **Product Detail Page** – check if you want to display on the Product Detail page.
  - **Standard Product Search –** check if you want to include in the standard Product Search. If checked the customer will have the option of searching on this value using the standard product search.
  - **Search Category Name –** enter the name that you want listed in standard Product Search available to customers.
  - **Comparable Product Search –** check if you want to include in search option displayed on the special Comparable Products page.

Product Detail Options section:

Product Detail Categories are equivalent to custom fields. You can define as many of these custom fields (referred to in PortalProdigy as a Product Detail Categories) as you need. Product Details Categories can be individually defined as searchable by customers. When a Product Detail Category is defined as searchable, it is listed in the Product Search list box that customers use to search your product catalog. PortalProdigy also allows you to specify whether the pre-defined fields Product Type, Brand, and Classification should be added as Product Detail Categories so your customers can search on them.

The following fields which entered in Item Management are automatically added to Product Search: Product Name, Short Description, Description 1, and Description 2. Thus PortalProdigy will automatically index these fields (including HTML Descriptions) and the field names will be listed in the Product Search list box.

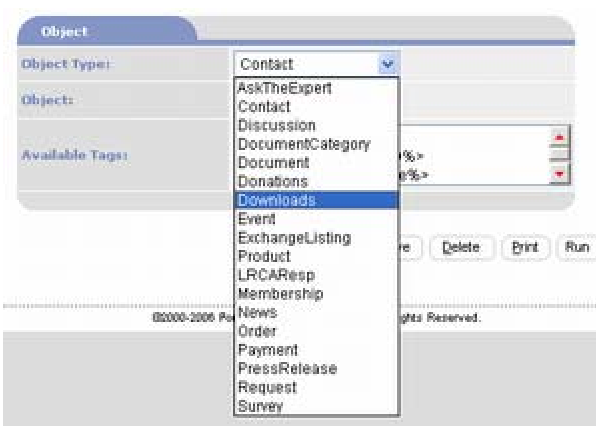
- **Add to Product Detail Categories**:
  - **Product Type –** set to “Yes” to allow customers to search on the Product Type field.
  - **Brand –** set to “Yes” to allow customers to search on the Brand field.
  - **Classification –** set to “Yes” to allow customers to search on the Classification field.

- **Manage**:
    - **Detail Categories** - create list of available Detail Categories that can be assigned to Items using Item Management. Detail Categories are used by the Product Keyword Search feature. Example values: `Author, Subject, ISBN, & Publisher`.

Product Downloads section:

Use to configure downloading of digital products such as music, video, images, documents, etc.

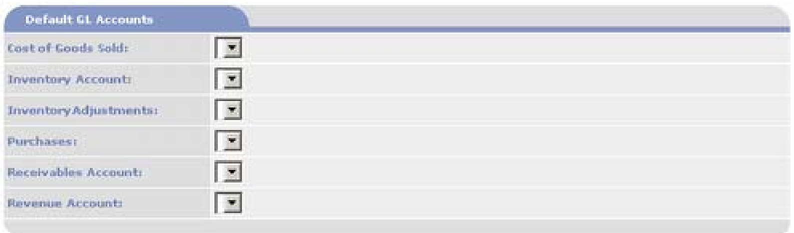
- **Enable –** set to “Yes” to turn on the Product Catalog feature.
- **Broadcast Template –** used to select a Broadcast Template that will format the automated email sent to the customer. The automated email is used to send the customer a download code and link to the download page of your website. It gets sent upon payment approval. Broadcast Templates are created using Broadcaster. The Broadcast Template list box only lists Templates that have Object Type set to “Downloads”. Object Type is a selection in the Broadcaster as shown below. The “Downloads” Object Type includes object tags to insert various fields including the <%DOWNLOADS:DownloadID%> tag used to insert the customers download key and the <%DOWNLOADS:DownloadLink%> tag used to insert a link to the website to download their product.



- **Days Active –** enter the number of days, as an integer, that the customer’s download key shall remain active. E.g. set to “30” to allow them to use their download key for 30 days from the date of their order before it expires.
- **Download Limit –** enter a number of times, as an integer, that the customer may use their download key. E.g. set to “3” to allow them to download their product 3 times.
- **Download Instructions –** enter instructions to be displayed on the download page.

GL Accounts section:

Used to specify the default GL accounts when adding new products in Item Management. For each Item you may specify the GL Accounts to be posted when the Item is sold, received or adjusted. The Enable GL Entries option must be turned on in GL Features Management in order for PORTALPRODIGY to record GL Transaction Entries.



- **Cost of Goods Sold –** used to select a default account value for Items. This is the GL expense account that is debited when an Item is sold.

- **Inventory –** used to select a default account value for Items. This is the GL asset account that is debited when an Item is received in inventory and credited when an Item is shipped or adjusted for loss.

- **Inventory Adjustments –** used to select a default account value for Items. This is the GL expense account that is debited when an Item is adjusted for loss.

- **Purchases –** used to select a default account value for Items. This is the GL liability account that is credited when an Item is purchased.

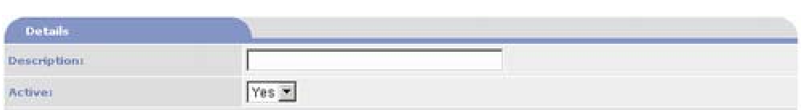
- **Revenue –** used to select a default account value for Items. This is the GL revenue account that is credited when an Item is fulfilled.

- **Unfulfilled Revenue –** used to select a default account value for Items. This is the GL revenue account that is credited when an Item is ordered but not fulfilled. When an Item is fulfilled and invoiced this account is debited and the specified Revenue is credited.

- **Sales Returns & Allowances –** used to select a default account value for Items. This is the GL revenue account that is debited when an Item is returned or an allowance is made to the customer.

1.3.2 Product Classifications Management page:

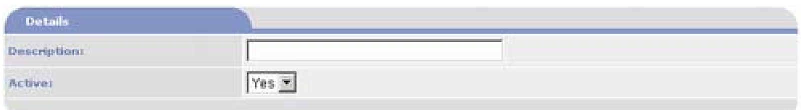
Used to maintain a lookup table of product classifications. If for example you were selling tennis shoes you might enter the following classifications: “Athletic”, “Casual”, “Dress”, etc.



- **Description:** enter the Classification name.
- **Active:** defaults to "Yes". Set to "No" to deactivate the Classification, removing it as a selection from lookup list boxes.

1.3.3 Product Types Management page

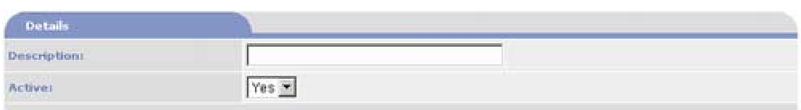
Used to maintain a lookup table of product types. If for example you were selling tennis shoes you might enter the following types: "Basketball", "Tennis", "Running", etc.



- **Description:** enter the Type name.
- **Active:** defaults to "Yes". Set to "No" to deactivate the Type, removing it as a selection from lookup list boxes.

1.3.4 Unit Types Management page

Used to maintain a lookup table of unit types such as: "Each", "Dozen", "Box", etc.



- **Description:** enter the Unit Type name.
- **Active:** defaults to "Yes". Set to "No" to deactivate the Unit Type, removing it as a selection from lookup list boxes.

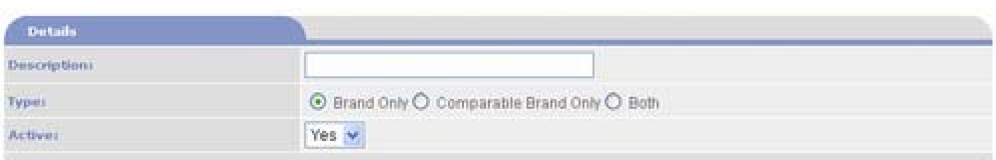
1.3.5 Price Groups

Used to assign special pricing to select groups of customers. Includes ability to assign quantity level pricing. Each customer can be assigned to a Price Group. For each Product Item you can specify the pricing for each Price Group.

- **Description:** enter the Price Group name.
- **Default Method:** this value is used to create a default pricing method that can be overridden for each Item. It provides the following choices:
    - **Specified Price:** use when you want to manually enter the sales price.
    - **% Discount List Price:** use when you want the system to automatically calculate the sales price as the list price minus a specified percentage.
    - **% Discount Sales Price:** use when you want the system to automatically calculate the sales price as the standard sales price minus a specified percentage.
    - **% Markup Cost:** use when you want the system to automatically calculate the sales price as the cost plus a specified percentage.
- **Copy From:** use to automatically copy the Item pricing for one group to another.
- **Active:** defaults to “Yes”. Set to “No” to deactivate the Price Group, removing it as a selection from lookup list boxes.

1.3.6 Product Brands Management page

Used to maintain a lookup table of the product brands you offer. If for example you were selling tennis shoes you might enter the following brands: “Nike”, “Reebok”, “Adidas”, etc. It is also used to create a table of comparable brands.



- **Description:** enter the Brand name.
- **Type:** used to specify how the record is to be used. The following choices are available:
    - **Brand Only:** select if you sell the Brand’s products and will not be comparing your own Brand’s products to it.

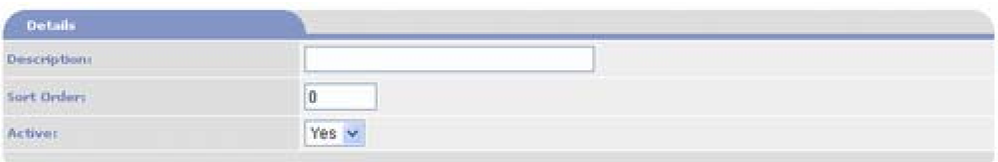
  - **Comparable Brand Only:** select if you do not sell the Brand's products and will only be comparing your own Brand's products to it. Use to define competitor brands.

  - **Both:** select if you sell the Brand's products and you will be comparing your own Brand's products to it. E.g. you may offer both brand name products and a generic brand and may want to allow customers to compare your generic brand with the brand names.

- **Active:** defaults to "Yes". Set to "No" to deactivate the Brand, removing it as a selection from lookup list boxes.

1.3.7 Related Document Types

Use to create categories for making documents available on the Product Detail page. Such documents are referred to as Related Documents or Document Collections. They are listed by Related Document Type on the Product Detail page.



- **Description:** enter the Related Document Type name. E.g. "Specifications", "Warranty & Return Policies", "White Papers", etc.

- **Sort Order:** determines the order of the Related Document Types on the Product Detail page. Leave set to 0 to have them displayed in alphabetical order.

- **Active:** defaults to "Yes". Set to "No" to deactivate the Related Document Type, removing it as a selection from lookup list boxes.

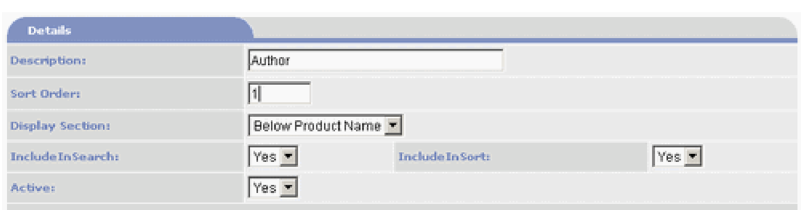
1.3.8 Related Item Types

Used to maintain Related Item Types which are categories for displaying related products on the Product Details page. Customers can add Related Items to their shopping cart as well as click on the Item to view its Product Details. Related Items are used to create add-on-sales, cross-selling, and up-selling.

- **Type ID:** this is the record ID that is auto assigned by the system.
- **Type:** enter a name for the Related Item Type. E.g. "Accessories", "Customers that bought this also bought", "You may also want to consider", etc.
- **Active:** defaults to "Yes". Set to "No" to deactivate the Related Items Type, removing it as a selection from lookup list boxes.

1.3.9 Product Details Category Management page

Used to maintain a lookup table of categories (customized fields) used by the Product Search feature and to provide customers with additional standardized information on the Product Detail page. Product Search allows customers to find products by selecting categories and searching on keywords. If for example you were selling books you might want to create the following categories: "Author", "Subject", "ISBN", "Publisher", etc. The customer could then search for a specific author by selecting "Author" from the Product Search list box and entering the author's name in the Product Search text box. Product Detail Categories can also be specified as non-searchable. E.g. you could create a Product Detail Category named "Number of Pages". It would be displayed on the Product Detail page as a standard piece of information.



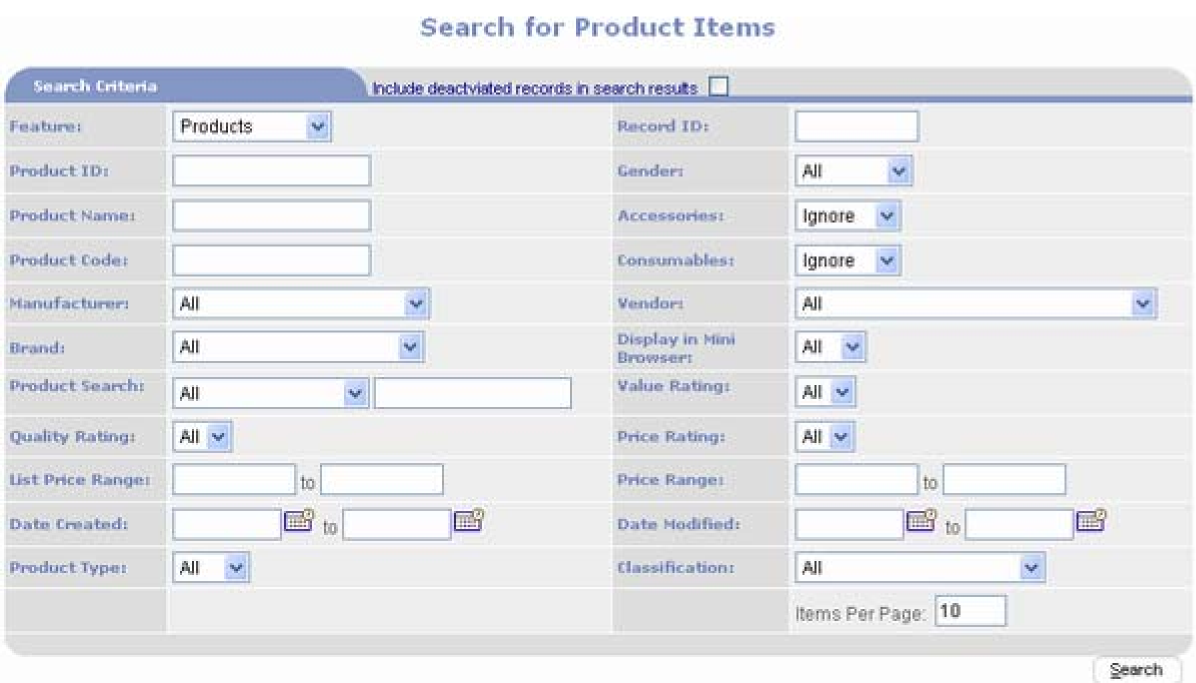
- **Description:** enter a name for the Detail Category.
- **Sort Order:** defaults to 0. You can control the display order of the Categories by entering an integer value. Don't fret if you enter the same number more than once, PORTALPRODIGY will resolve this by sorting the duplicates alphanumerically.
- **Display Section:** this setting determines where the Item is displayed in the Shopping Catalog Product Details Page. Make one of two choices:

- **Below Product Name** – displays the Category directly below the Product Name in the header.
- **In Product Details** – displays the Category with the other details in the lower portion of the Product Details page.

- **Include in Search** – set to "Yes" to make this category searchable using Product Search. Set to "No" to exclude from Product Search, but still display in Shopping Catalog for informational purposes.
- **Include in Sort** – set to "Yes" to sort the Products by this category. Set to "No" to exclude from sort, but still display in Shopping Catalog.
- **Active:** defaults to "Yes". Set to "No" to deactivate the Category, removing it as a selection from lookup list boxes.

1.3.10 Search for Product Items page:

Used to locate and open Items in Item Management.



Search Criteria section:

- **Include deactivated records in search results:** when unchecked, only active records are included. Check to include deactivated records.

- **Feature:** this is the PORTALPRODIGY Feature Component that the Item belongs to. The following choices are available in the drop down list box:
    - **All –** this is the default value. It is used to include all Features in search.
    - **Ads –** used to search for Items that are used by CPI Feature Component for advertisement fees. CPI is a special add-on component that is not available in the standard version of PORTALPRODIGY.
    - **Donations** - used to search for Items that are used by Donations Feature Component for donations.
    - **Events –** used to search for Items that are used by Events Feature Component for event fees.
    - **Exchanges –** used to search for Items that are used by Exchanges Feature Component for exchange listing fees.
    - **Memberships –** used to search for Items that are used by Membership Feature Component for membership fees.
    - **Press Releases –** used to search for Items that are used by Press Release Feature Component for press release broadcasting fees.
    - **Products –** used to search for Items that are used by Shopping Features Component for Products & Services.
    - **Requests -** used to search for Items that are used by Requests & Help Desk Feature Component for service fees.
- **Record ID:** used to limit your search to a specific Feature record when Feature is selected. E.g. if you set Feature to “Events” you may enter the record ID of a specific Event to limit the display of Items created for that Event.
- **Product ID:** used to search for a specific Item by the Item ID. Note that Product ID and Item ID are the same thing. This is the ID that is automatically assigned by the system to each Item.
- **Gender:** used to search for Items by Gender. Options include:
    - **All –** includes all Items regardless of Gender.
    - **Male Only –** includes only Items with Gender set to *Male*.
    - **Female Only** - includes only Items with Gender set to *Female*.
    - **Universal -** includes only Items with Gender set to *Universal*.
- **Product Name:** used to search for Items by their Product (Item) Name.

- **Accessories:** used to search for Items categorized as Accessories. Options include:
  - **Include** - includes Items categorized as Consumables.
  - **Ignore –** includes all Items regardless of consumables categorization.
  - **Limit To –** includes only Items categorized as Consumables.
  - **Exclude** - includes only Items not categorized as Consumables.
- **Product Code:** used to search for Items by product code. Product Code is the part number assigned to an Item.
- **Consumables:** used to search for Items categorized as Consumables. Options include:
  - **Include** - includes Items categorized as Consumables.
  - **Ignore –** includes all Items regardless of consumables categorization.
  - **Limit To –** includes only Items categorized as Consumables.
  - **Exclude** - includes only Items not categorized as Consumables.
- **Manufacturer:** used to search for Items by Manufacturer name. Manufacturers are defined in Companies Management as Companies with Company Type set to *Manufacturer*.
- **Vendor:** used to search for Items by Vendor name. Vendors are defined in Companies Management as Companies with Company Type set to *Vendor*.
- **Brand:** used to search for Items by Brand. Brands are defined in Features Management.
- **Display in Mini Browser:** used to search for Items by Display in Mini Browser setting. Options include:
  - **All –** used to include all Items regardless of Display in Mini Browser setting.
  - **Yes** – used to search for Items with Display in Min Browses set to *Yes*. These are Items that are highlighted by displaying them on the Home page in the Products/Shopping Mini Browser.
  - **No –** used to search for Items with Display in Min Browses set to *No*.
- **Product Search**: includes a list box for selecting a specific field to search on and a text box for entering the value to search for. The default value “All” will search on all of the fields that are listed. The fields listed are the same field selections that are offered in the Product Search for customers.
- **Value Rating:** used to search for Items with a specific Value Rating.

- **Quality Rating:** used to search for Items with a specific Quality Rating.
- **Price Rating:** used to search for Items with a specific Price Rating.
- **List Price Range:** used to search for Items within a specified List Price Range.
- **Price Range:** used to search for Items within a specified Sales Price Range.
- **Date Created range –** when a new Item is created, PORTALPRODIGY stores the date maintained by the PORTALPRODIGY web-server system clock. Entering a date in the first text box only, will retrieve all Items with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.
- **Date Modified range –** when a new Item is created, PORTALPRODIGY stores the date maintained by the PORTALPRODIGY web-server system clock. Entering a date in the first text box only, will retrieve all Items with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.
- **Product Type –** used to search for Items by Product Type. Product Types are defined in Features Management.
- **Classification:** used to search for Items by Classification. Classifications are defined in Features Management.
- Search - used to submit search criteria to PORTALPRODIGY.

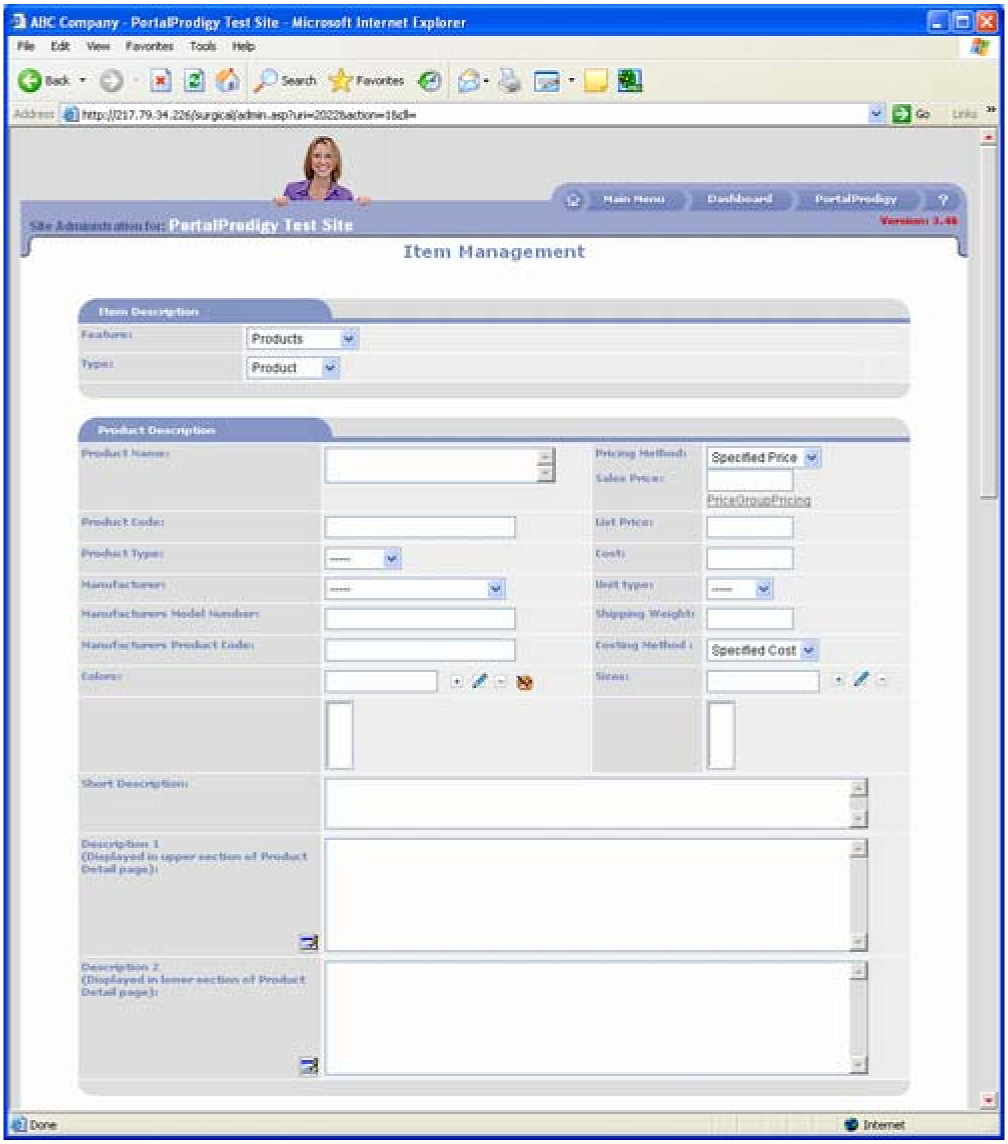
Option buttons section:

Add New	Opens Item Management in add new mode to create a new Item record.
Copy Item	Opens Copy Data page which is used to create a new Item record by copying the specified Item record.
Clear	Clears the search criteria.
Print	Prints the website page to the user's local printer.
Main Menu	Closes the page and displays the site administration menu.

1.3.11 Item Management page

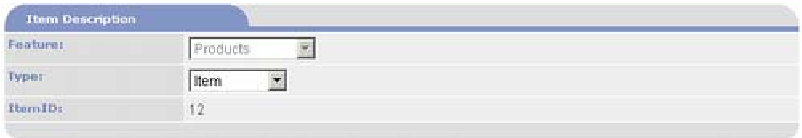
This is where permitted Administrators add, edit and delete Items (Products). For convenience due to the large number of data elements in the Items record, PORTALPRODIGY hides those data elements that are not applicable to the Feature you have selected. Thus in Items Management page if you set Feature = "Events", the page will refresh to show the Items inputs that are applicable to Event Items. This section describes the Items Management page as viewed when Feature setting is

Product. See the individual chapters for each Feature Component for description of the Items Management for that Feature Component's Items.



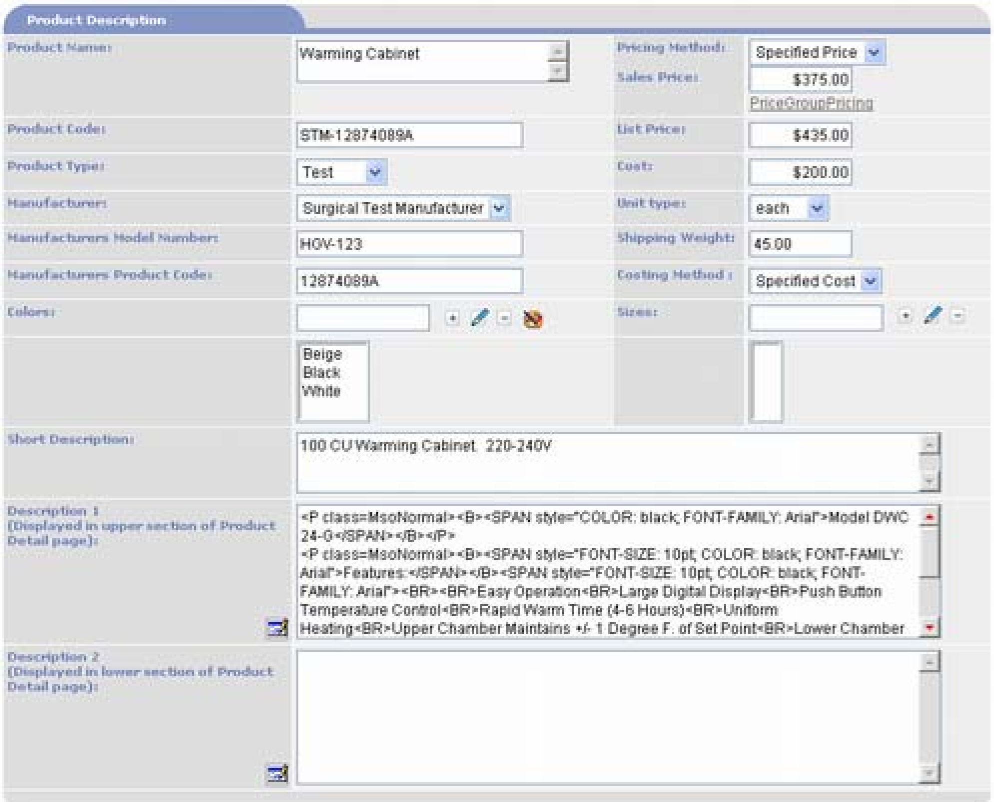
Time Saver! *The right click key may be used on the Items Management page to display a pop-up menu for viewing and selecting options. These same options are also available at the bottom of the page as option buttons. Use the right click menu to avoid scrolling to the bottom of the page.*

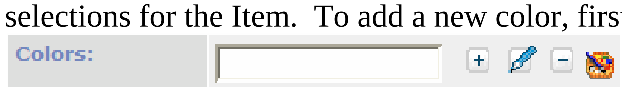
Item Description section:

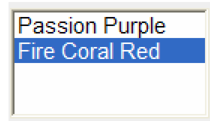


- **Feature:** this is the PORTALPRODIGY Feature Component that the Item belongs to. Changing the value causes PORTALPRODIGY to refresh the page to display the data elements applicable to the selected Feature. This field allows you to use the Items Management page to create Items for any Feature Component, however it is recommended to access Item Management directly form the other Feature Components. The following choices are available:
  - **Ad –** specifies the Item as and advertisement fee for the CPI Feature Component. CPI is a special add-on component not available in PORTALPRODIGY.
  - **Donation –** specifies the Item as Donation type for collecting donations.
  - **Event –** specifies the Item as an event fee for the Events Feature Component.
  - **Exchange –** specifies the Item as an exchange listing fee for the Exchanges Feature Component.
  - **Membership –** specifies the Item as a membership fee for the Membership Feature Component.
  - **Press Release –** specifies the Item as a press release broadcasting fee for the Press Release Feature Component.
  - **Product –** specifies the Item as a product or service for the Shopping Features Component.
  - **Request –** specifies the Item as a service fee for use with Request Types.
- **Type:** there are four possible values.
  - **Product** – this is the value you will use most often. It is used to define an Item that is a Product or a fee for a feature component.
  - **Service** – only listed when Feature is set to “Products”. It is used to track and differentiate labor from non-labor Items in the Product Shopping Catalog. Select Service to define an Item that is for labor as opposed to a product.
  - **Discount** – used to define Items that track and apply promotional and trade discounts.
  - **Adjustment** – used to define Items for tracking and applying adjustments to Orders that are not for discounts such as an adjustment for damage to a Product.
- **Item ID:** read only. This is a unique sequential number that is assigned by PORTALPRODIGY when the Item record is saved for the first time.

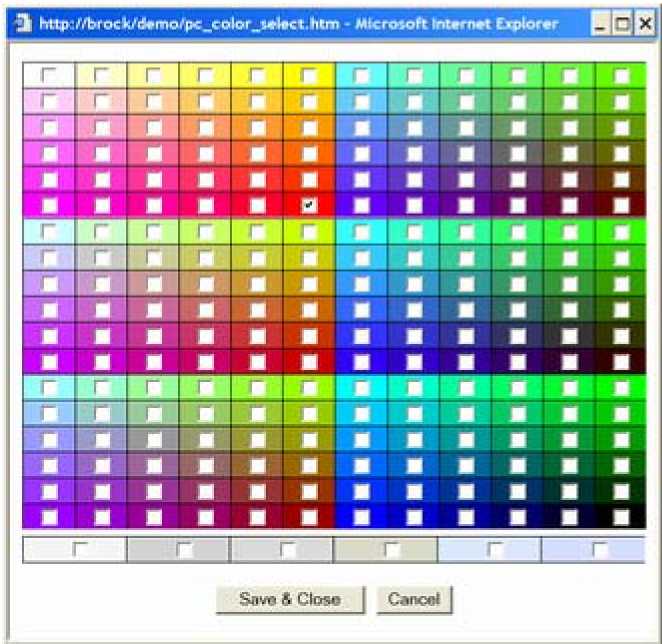
Product Description section:



- **Product Name:** enter the Item's name. A Product Name is required for all Items.
- **Product Code:** if your organization uses part numbers or SKUs this is where you enter it. You may use any combination of letters, numbers, periods, dashes, and slashes. Product Search will ignore the dashes, periods, and slashes.
- **Product Type -** select one of the product types from the drop down list. Product Types are defined in Items Feature Management.
- **Manufacturer:** you may select a manufacture from the drop down list. Manufacturers are defined in Companies Management as Companies with Company Type set to *Manufacturer*.
- **Manufacturer Model Number:** used to store the Manufacturer's model number for the Item.
- **Manufacturers Product Code:** used to store the Manufacturer's product code (part number) for the Item.
- **Colors:** used to define the available color selections for the Item. To add a new color, first enter the name of the color in the text box 

then click the + button to add the item to the list control 

. With the color highlighted in the list control, such as "Fire Coral Red", click on to open the color palette pop-up window to select a color. The selected color is used for example color swatches.



- + click to add a new color.
- click to edit the selected color in the color list control. When done editing click to save the edits.
- − click to delete the selected color in the color list control.
- click to open the color palette window to select an example color. Example color swatches can optionally be displayed on the Items Detail page in the Shopping Catalog.

- **Pricing Method:** select one of the following:
  - **Specified Price:** use when you want to offer the Item at the specified Sales Price. The Sales Price is displayed in your product catalog and product detail page. Customers assigned to a Price Group will see their pricing listed in a separate table on the product detail page.
  - **Place a Bid:** use when you want the customer to place a bid for the Item. Instead of displaying the Sales Price it will display "Place a Bid" and the Add to Shopping Cart option will be changed to "Add to Shopping Cart as Bid Request".

  - **Request Quote:** use when you want the customer to submit a Request for Quote (RFQ) for the Item. Instead of displaying the Sales Price it will display "Request Quote" and the Add to Shopping Cart option will be changed to "Add to Shopping Cart as Request for Quote".

- **Sales Price:** this is the Item's Sales Price that is listed in the Product Catalog and it is the default unit price the customer is charged for the Item.

- **<u>Price Group Pricing</u>:** use this link to define the pricing for each of your Price Groups. Use Price Groups to offer special pricing to selected groups of customers and to offer quantity level pricing.

- **List Price:** enter a List Price if you want to compare your Sales Price with the List Price such as the Manufacturer's List Price. See the Product & Inventory Features Management section to enable display of the List Price on the Product Detail page. Note that List Price is an information only value.

- **Cost:** this is the Item's unit cost. Its usage is dependent on the Costing Method chosen for the Item. When either Initial Inventory Entry (see Product & Inventory Features Management) is turned *On* or the Item's Costing Method is set to *Specified*, manual entry of the Cost is allowed; otherwise, the Cost is read only and maintained by PORTALPRODIGY. See Costing Methods below for additional explanation.

- **Unit Type:** select one of the pre-defined values form the list box such as *Each, Box, Case, Cartoon, Pound*, etc. Unit Types are maintained in Order Features Management.

- **Shipping Weight:** enter the shipping weight for one unit of the Product. Enter the weight in the same unit of measure that is used for Shipping Methods. Typically entered as pounds using a decimal to enter a fraction of a pound.

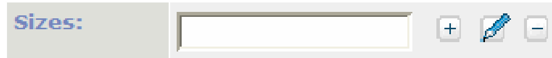
- **Costing Method:** select a costing method from the list box. PORTALPRODIGY offers the following choices:

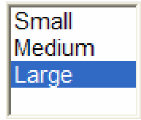
  - **Average Cost -** the Average Cost method recalculates the Item's Cost each time Inventory is received. It calculates this by adding the Qty Received multiplied by the Unit Cost to the Total Cost of the Qty On Hand before the Received Qty, then divides by the new Qty On Hand. Thus the Item's Cost is the average cost for what is on hand.

  - **Specified Cost –**this costing method is used to manually specify the Item's cost by entering it into the Item's Cost field. When this costing method is selected, PORTALPRODIGY does not update the Item's cost when new inventory is entered.

  - **LIFO -** (At this time this costing method has not been implemented, however it is planned as a future enhancement) this is the Last In First Out method.

  - **FIFO -** (At this time this costing method has not been implemented, however it is planned as a future enhancement) this is the First In First Out method.

- **Sizes:** used to define the available sizes for the Item. To add a new size, first enter a description of the size in the text box 

then click the button to add the item to the list control 

.
    - o click to add a new size.
    - o click to edit the selected size in the size list control. When done editing click to save the edits.
    - o click to delete the selected size in the size list control.
- **Short Description:** used to display a short text description of the Item in the Product Catalog.
- **Description 1:** this is where you describe the Product or Service. The Description is displayed on the Product Detail page of the Shopping Catalog. Description 1 is displayed below the Product Name and above the product details. Enter as text directly in the memo field or use the HTML Editor option to format as HTML and include pictures.
- **Description 2:** this is where you can provide an additional description of the Product or Service. The Description is displayed on the Product Detail page of the Shopping Catalog. Description 2 is displayed below the Product Details section. Enter as text directly in the memo field or use the HTML Editor option to format as HTML and include pictures.

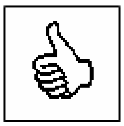
Options section:

- **Taxable? –** Set to *Yes* if Sales Tax should be applied to the Item. Set to *No* if Sales Tax should not be applied to the Item. See Orders Feature Management for more information about Sales Tax and defining Tax Districts.
- **Inventory? –** Set to *Yes* to track inventory for the Item. This will cause PORTALPRODIGY to maintain the Qty on Hand for the Item. Set to *No* if inventory should not be tracked for the Item. When set to *No*, PORTALPRODIGY will not maintain the Qty on Hand for the Item. Typically you will set this to *No* when your organization's suppliers are directly

fulfilling the Item or when an Item is a special order Item that you don't maintain in your inventory.

- **Limit Order to Qty on Hand? –** Set to *Yes* to prevent customers from ordering the Item when it is out of stock. Set to *No* to allow customers to order the Item even when it is out of stock.

- **Display in Mini Browser?** Set to *Yes* to include the Item in the Products Mini Browser displayed on your Home page. The Products Mini Browser allows you to showcase selected items on your Home page. Set to *No* to turn off display of the Item in the Products Mini Browser.



Cool Feature: *the Display in Mini Browser feature makes promotion of Items on your organization's Home page as simple as clicking a few buttons and voila your Home page is instantly updated.*

GL Accounts:

Used to specify the GL accounts to be posted when the Item is sold, received or adjusted. The Enable GL Entries option must be turned on in GL Features Management in order for PORTALPRODIGY to record GL Transaction Entries.

- **Cost of Goods Sold –** used to select the GL expense account that is debited when an Item is sold.

- **Inventory –** used to select the GL asset account that is debited when an Item is received in inventory and credited when an Item is shipped or adjusted for loss.

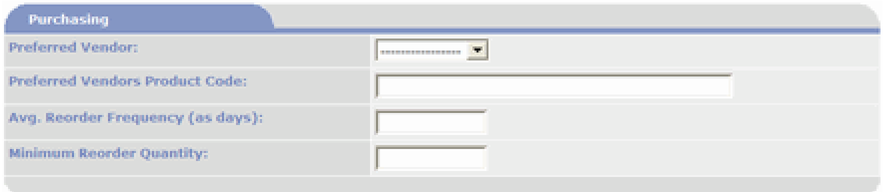
- **Inventory Adjustments –** used to select the GL expense account that is debited when an Item is adjusted for loss.

- **Revenue –** used to select the GL revenue account that is credited when an Item is fulfilled.

- **Unfulfilled Revenue –** used to select the GL revenue account that is credited when an Item is ordered but not fulfilled. When an Item is fulfilled and invoiced this account is debited and the specified Revenue is credited.

- **Sales Returns & Allowances –** used to select the GL revenue account that is debited when an Item is returned or an allowance is made to the customer.

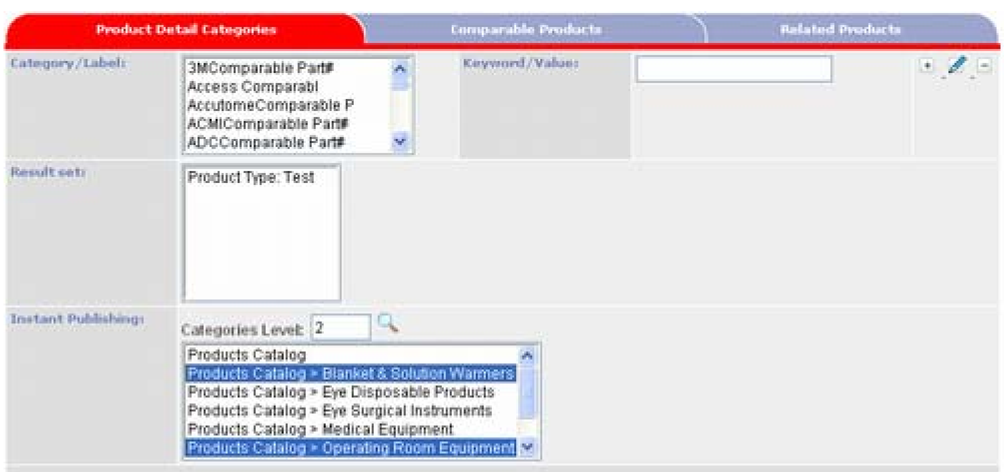
Purchasing:



- **Preferred Vendor:** used to specify a preferred Vendor (Supplier) for the Item. Vendors are defined in Companies Management as Companies with Company Type set to *Vendor*.
- **Preferred Vendor Product Code:** used to enter the Vendor's SKU or part number for the Item.
- **Avg. Reorder Frequency (as days):** used to specify the average time in days that the Item should be reordered.
- **Minimum Reorder Quantity:** used to specify the minimum unit quantity that can be ordered from the Vendor.

Product Detail Categories tab:

Used to provide additional information about the Product that is displayed in the Shopping Catalog Product Details page and is searchable by customers using the Product Search Feature. Product Detail Categories must first be defined in Product & Inventory Features Management using the Detail Categories option.



- **Category/Label:** used to specify a Category. When adding new Keywords, first highlight a Category then enter the keyword or phrase into the Keyword text box, then click option to add it to the Result Set.

- **Keyword/Value:** used to enter a searchable keyword or phrase.

- **Result Set:** displays the matched Categories and Keywords.

  - To edit an entry, click on the entry in the Result Set then click the option. Edit the entry in the Keyword/Value text box field, then click option to update the Result Set.
  - To delete an entry, click on the entry in the Result Set, then click option.

- **Instant Publishing:** timesaver that is used to quickly publish the Item in the Product Catalog. Lists the first two levels of Categories in the Product Catalog. Highlight each Category that the product is to be listed under. To list product in Categories that are on third level or below you must use the Product Catalog Management page's Add Product to Selected Category option.

Comparable Products tab:

Used to enter and edit comparable items.

- **Comparable Brand:** enter the competitor/other vendor's brand name. Note that the label for this column is customizable using Product & Inventory Features Management.

- **Comparable Part#:** enter the competitor/other vendor's product code. Note that the label for this column is customizable using Product & Inventory Features Management.

- **Comparable Price:** enter the competitor/other vendor's sales price. Note that the label for this column is customizable using Product & Inventory Features Management.

Related Products tab:

Used to enter and edit related Items.

- **Type:** select a Related Products Type (category) from the list box. Related Product Types are defined from Product & Inventory Features Management.

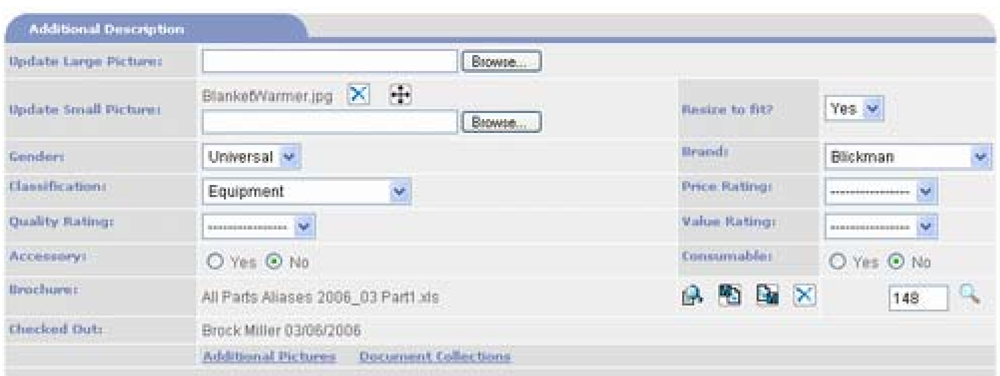
- **Item ID:** enter the Related Product's Item ID or use the lookup option to search for and select an Item. In lieu of an Item ID you enter a Product Code in the next column's text box.

- **Product Code:** enter the Related Product's Product Code if you did not use the Item ID field; otherwise this field is auto filled when an Item ID is entered or selected using the lookup option.

- **Item Name:** auto filled when an Item ID or Product Code is entered or selected.

- **Sort Order:** used to control the display order within the Related Product Type. Leave blank or set to 0 to sort alphabetically.

Additional Description:



- **Update Large Picture:** used to attach a picture to the Item that is displayed in the Product Details page when the customer double clicks on the small picture. Click on the Browse... button to locate and upload the picture.

- **Update Small Picture:** used to attach a picture to the Item that is displayed in the Product Details page and as a thumbnail in the Shopping Catalog Categories listings. This picture is also used when the Item is included in the Products Mini Browser. Click on the Browse... button to locate and upload the picture.

- **Resize to Fit?** Set to *Yes* and PORTALPRODIGY will automatically resize the Small Picture to a size that is appropriate for the Product Details page. When set to No, PORTALPRODIGY will display the picture using the pictures native size. It is recommended to set this option to *Yes*.

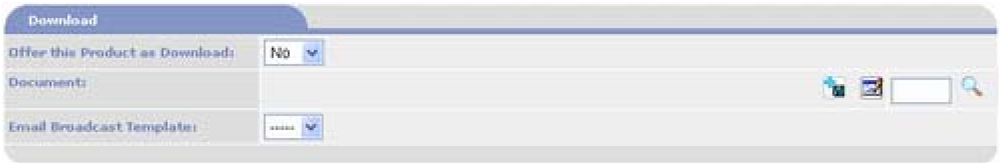
  Helpful Hint: *Many Internet users are still using dial-up connections. Consequently it is a good idea to keep the file size of your Pictures to a minimum. Whenever possible use GIF or JPG format and reduce the resolution of your pictures to an acceptable minimum. If you want to display higher resolution or larger images, use the Large Picture option for this. Most users are accustomed to double clicking on an image to view the image in higher resolution or larger size.*

- **Gender:** used to specify which Gender the Item is designed for. This is a useful option for Items such as clothing. Options include:
  - **Universal –** this is the default value which indicates the Item is not Gender specific.
  - **Males –** use to specify the Item as being designed for males.
  - **Females –** use to specify the Item as being designed for females.
- **Brand:** used to specify the Items Brand. Brands are defined in Product & Inventory Features Management. This field can be used to search for and report on Items.
- **Classification:** used to assign the Item a Classification. Classifications are defined in Product & Inventory Features Management. This field can be used to search for and report on Items.
- **Price Rating:** used to assign the Item a price rating. Price Ratings are defined in Product & Inventory Features Management. This field can be used to search for and report on Items.
- **Quality Rating:** used to assign the Item a quality rating. Quality Ratings are defined in Product & Inventory Features Management. This field can be used to search for and report on Items.
- **Value Rating:** used to assign the Item a value rating. Value Ratings are defined in Product & Inventory Features Management. This field can be used to search for and report on Items.
- **Accessory:** set to *Yes* to designate the Item as being an accessory. This field can be used to search for and report on Items. (Note that a planned enhancement to PORTALPRODIGY is a feature for linking accessories to other Items so they can be displayed on the Product Detail page.)
- **Consumable:** set to *Yes* to designate the Item as being a consumable. This field can be used to search for and report on Items.

- **Brochure:** used to attach a Brochure to the Item. Brochures are a great tool for providing a multimedia presentation of the product to the Customer. Customers view the Brochure using a button in the Shipping Catalog Product Detail page. PORTALPRODIGY stores Brochures as documents in the Document Resource Library, which allows the Brochure to be linked to other Items and pages within your PORTALPRODIGY Website. The following options are used to attach, edit and remove brochures from the Item:
  -  - used to view the Brochure. The Brochure will open in a new browser window.
  -  - used to upload a Brochure to the PORTALPRODIGY Document Resource Library and automatically attach it to the Item. If a Brochure has already been uploaded it will update the file.
  -  - used to checkout the Brochure for editing.
  -  - used to create or edit an existing Brochure using the PORTALPRODIGY Document Editor.
  -  - used to attach a Brochure that already exists in the Document Resource Library. Either enter a Document ID into the text box or click on the  lookup icon to use the Search For Documents feature to locate and select an existing Brochure.
- **Checked Out** – if the Brochure has been checked out of the Document Resource Library, it will display the name of the user that checked it out.
- Additional Pictures - used to upload additional pictures. A link for customers to view the additional pictures is included on the product detail page.
- Document Collections - used to upload and attach related documents to the Item. Documents are displayed by category. E.g. “Specifications”, “Warranty & Policy Documents”, “White Papers”, etc.

Download section:

Used to enable and configure downloading of the item. This feature must be enabled in Product & Inventory Features Management. If not enabled, this section will not be visible in Item Management.



- **Offer this Product as Download:** set to "Yes" to make the Item available as download.

- **Document:** used to upload the downloadable file. The following options are used to upload, edit and remove the Item's downloadable file:

  -  - used to view or open the file. If your browser supports opening the file, it will be opened in a new browser window.

  -  - used to upload the downloadable file to the PORTALPRODIGY Document Resource Library and automatically attach it to the Item. If a file has already been uploaded it will update the file.

  -  - used to checkout the file for editing.

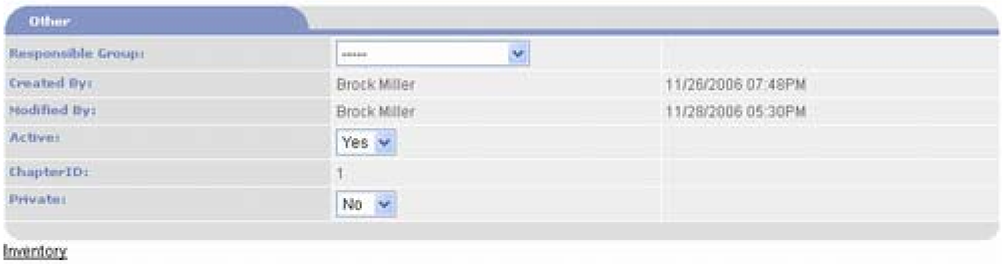
  -  - if the file is an HTML file this option is used to edit the file using the PORTALPRODIGY Document Editor. This option may also be used to create an HTML file.

  -  - used to attach a file that already exists in the Document Resource Library. Either enter a Document ID into the text box or click on the  lookup icon to use the Search For Documents feature to locate and select an existing Brochure.

- **Email Broadcast Template:** select an email template used for sending the customer their download key with instructions and link to your website to download their product. This email is sent upon payment approval. Templates are created using Broadcaster. Object Type must be set to "Download".

Other section:

This section displays standard record information along with additional options.



- **Responsible Group:** used to specify a Security Group that is responsible for maintaining the Item. Groups are defined using the Security Management feature.

- **Created By –** the name of the user that created the record and the date it was created. Lists user's first name followed by last name. Note that this field is not displayed until an Item record is saved for the first time.

- **Modified By –** the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name. Note that this field is not displayed until an Item record is saved for the first time.

- **Active –** by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records. Deactivating an Item removes it from the Shopping Catalog.

- **ChapterID –** This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.

- **Topics –** The Topics field is only displayed when Advanced Product Catalog option is set to "No". The Topics Field contains a selection list based on entries made on the Product & Inventory Topics Management pages. This is an additional method of categorizing Items for searching and reporting purposes.

- **Private –** The Private Field can be set to *Yes* or *No.* Selecting *No* indicates that the Item may be displayed to all customers. Selecting *YES* indicates that only customers with appropriate privileges may view and purchase the Item.

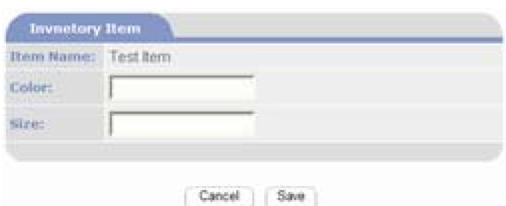
- Inventory **-** this option is used to display the Inventory Management page for the Item.

Inventory Management:

This page displays a record (row) for each combination of color and size. Each record (row) displayed has a corresponding Inventory record. Items without colors and sizes and Items with only one color/size combo have only one Inventory record.

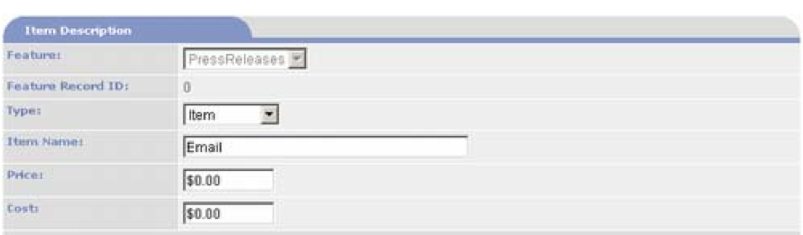
When Initial Inventory Entry (see Product & Inventory Features Management) is turned *On*, the Qty fields on this page allow entry of quantities (can be manually maintained). When Initial Inventory Entry is turned *Off*, the quantities are automatically maintained by PORTALPRODIGY and made read only on this page (do not allow manual entry or editing).

- **Sub Code –** allows you to assign a sub code to each color/size combo. If there is only one Inventory record (color/size combo) for the Item, this value is not necessary.
- **Mfr. Sub Code –** enter the manufacturers sub code (sub product number or SKU) for color/size combo.
- **Color –** displays the color option.
- **Size** – displays the size option.
- **Qty On Hand –** displays the current quantity in stock (inventory).
- **Qty Committed –** display the current quantity of available inventory that is committed to unshipped Orders.
- **Qty Committed BO –** displays the current quantity of unavailable inventory (out of stock) that is committed to unshipped Orders.
-  - this option is used to display the Inventory Item Edit page which is used to change the Color and Size of the Inventory record. See below:



Item Description section for Press Release Feature Items:

This section is only visible when the field Feature is set to “Press Release”.

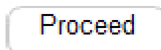


Special Options for Press Releases Feature Items:

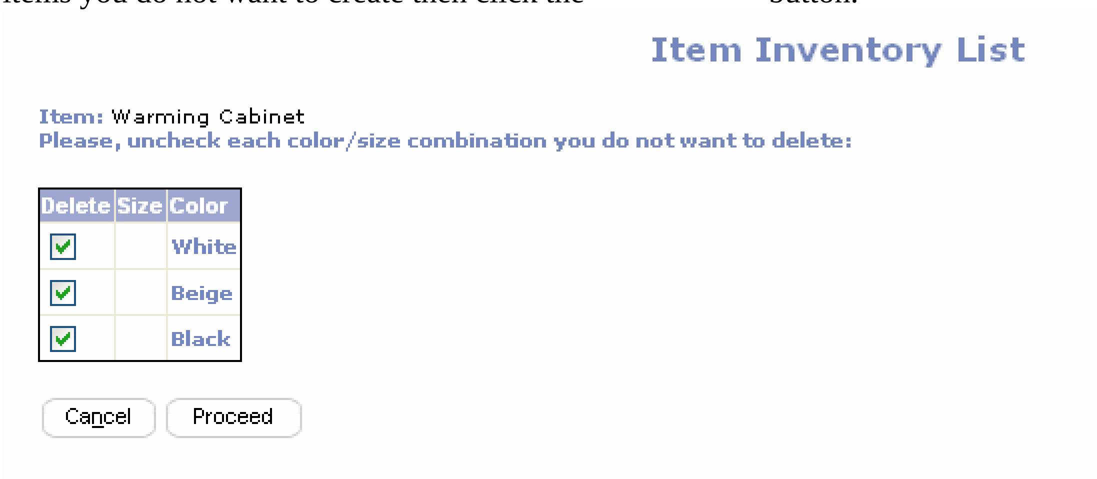
This section is only visible when the field Feature is set to "Press Release".

1. Default Item - defaults to "No". When set to "Yes" it causes the Item to be the default price in the Press Release Feature Management page. This is the price that users will automatically be charged when using the customer user interface to creates and send Press Releases.

Automated Inventory Record Creation of Sub-Items:

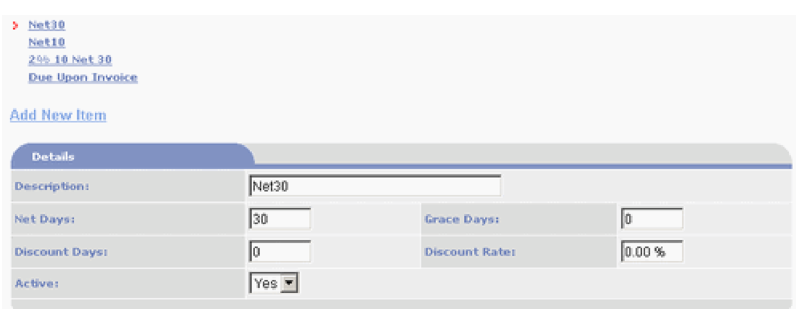
This option is displayed when sub-items (colors and sizes) are defined. You will be prompted to confirm creation of separate sub-items for each combination of color and size. Uncheck any sub-items you do not want to create then click the 

button.



1.3.12 Terms Management page

This is where you define credit terms offered to customers.



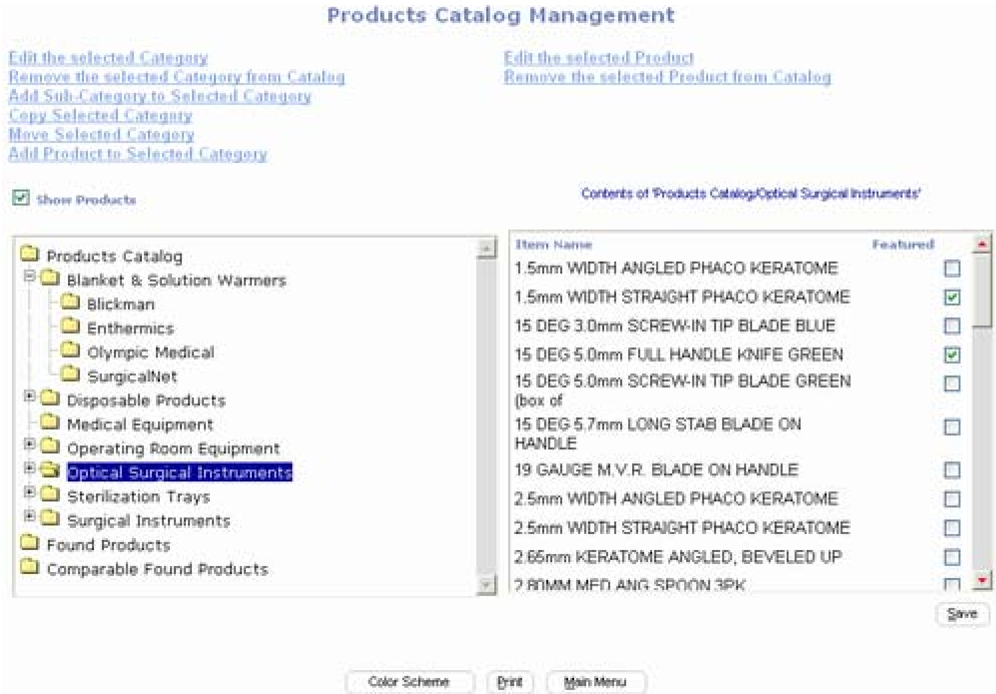
Contains the following data elements:

- **Description -** this is the name that is assigned to the Terms and displayed in selection list boxes, such as"2% 10 Net 30"
- **Net Days -** This is the number days from the Date of Invoice that the payment is due. Enter as an integer such as "30" to make the payment due date the Invoice Date + 30 days.
- **Grace Days:** This is the number of days beyond the payment due date before late payment collection process is begun and late fees begin accruing. Enter as an integer such as"5" to make it Payment Due Date + 5 days.
- **Discount Days -** This is the number of days beyond the Date of Invoice that payment may be made to earn early payment discount. Enter as an integer such as "10" to make it Date of Invoice + 10 days.
- **Discount Rate:** This is the rate applied to the Invoice Amount Due when payment is received within the discount period. Enter as a percentage as any number from .00 to 100.00%.
- **Active -** To disable the term so that it is no longer available as a selection within PORTALPRODIGY, set to "No"; otherwise it should remain as "Yes", which is the default value.

1.3.13 Products Catalog Management page

This is where you define your Product Catalog for customer shopping. Products Catalog Management is used to create a hierarchal catalog structure composed of an unlimited number of categories and sub categories that are used to list your products. The catalog can also contain an unlimited number of sub category levels. You define how each category and sub category should appear and what product items each should contain.

Items are easily added to categories from the Category Management page using a batch selection process. Items may also be individually assigned to categories from Item Management. Each Item may be listed in multiple categories. E.g. the book "John Adams" could be listed both under "American History > Biographies" and under "Authors > McCullough". When a customer clicks on an item listed in a Product Catalog Category listing it is opened in a Product Details page. Note that the options selected here do not affect how the item is displayed in the Product Detail page. The Product Detail page is individually managed for each item using the options available in Item Management.



- Edit the selected Category: click on this option to edit the configuration of the category selected (highlighted) in the category list. You may alternatively double click on the Category name.

- Remove the selected Category from Catalog: click on this option to delete the category selected (highlighted) in the category list.

- Add Sub-Category to Selected Category: click on this option to create a new category. The new category is added as a sub-category to the category selected (highlighted) in the category list below it. PORTALPRODIGY supports an unlimited number of categories, sub-categories and levels.

Products Category section:

- **Category Name:** enter a name for the Category.

- **Short Description:** enter a short description to appear below the category name in category listings.

- **Long Description:** enter a long description to appear in the header for the category.

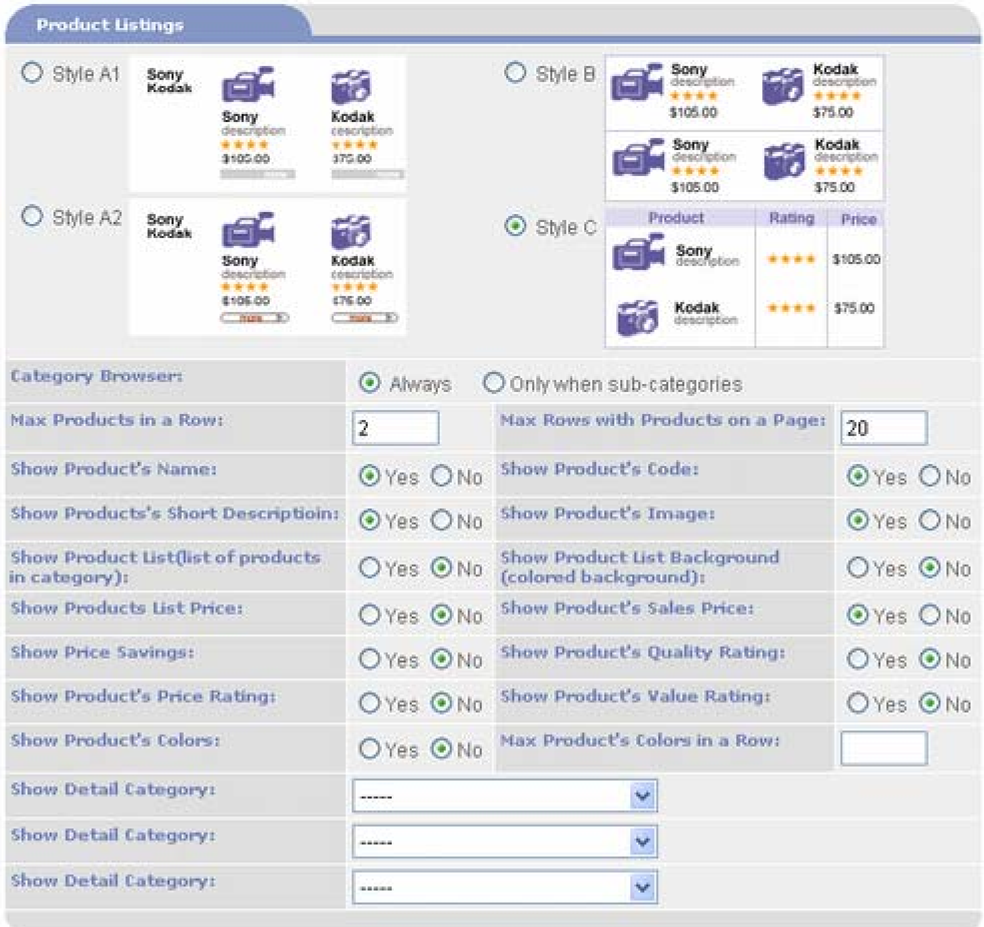
- **Update Image:** used to upload a picture to appear in the header for the category.

- **Sort Order:** used to control the order of categories and sub-categories within the catalog. When set to *0*, the categories are sorted alphabetically.

Category Appearance in Clients Part section:

- **Show Category Image On:** select either left or right side.

Product Listings section:



- **Style:** select one of the four predefined Styles for listing products.

- **Category Browser:** used to display a listing of the other sub-categories on same level as well as their sub-categories. The following choices are available:

  - **Always:** select this option to always display a Category Browser.

  - **Only when sub-categories:** select this option to only display a Category Browser when the currently selected category has sub-categories.

- **Max Products in a Row:** if the selected Product Listing Style supports multiple products per row, enter the maximum number per row. E.g. enter *2* to display 2 products per row. The number of products displayed per page is determined by the Max Products in a Row and Max Rows with Products on a Page settings (multiply the two values to determine the number of products per page). PORTALPRODIGY automatically inserts a product count, page count, links to each page and next and last page navigation options.

- **Max Rows with Products on a Page:** enter the maximum number of rows to display per page. E.g. enter 20 to display 20 rows of products per page.

- **Show Product's Name:** set to *Yes* to display the name of the product in the Product Info section.

- **Show Product's Code:** set to *Yes* to display the Product Code in the Product Info section. Product Code is your Part# or SKU for the Item.

- **Show Product's Short Description:** set to *Yes* to display the Short Description.

- **Show Product's Image:** set to *Yes* to display a thumbnail of each products image in the Product Info section. Product and Inventory Features Management allows a default image to be uploaded. The default image is displayed whenever a Product does not have an image.

- **Show Products List:** set to *Yes* to display an alphabetized list of product names on the left side of the content section. See callout in the picture above. This list is in addition to the products and their information listed within the page. This list includes all product names belonging to the currently selected category and servers as quick access method to products not shown on the page. Set to *No*, to not display the list.

- **Show Products List Background:** set to *Yes* to enable the background color selected in Color Scheme page for the Products List on the left hand side of page. Used to make the Products List standout by having a colored background.

- **Show Products List Price:** set to Yes to display the List Price. This is meant to show a comparison between your discounted Sales Price and the List Price.

- **Show Products Sales Price:** set to *Yes* to display the Sales Price.

- **Show Price Savings:** set to *Yes* to display the Price Savings amount. This is calculated by the system as List Price less Sales Price.

- **Show Product's Quality Rating:** set to *Yes* to display the Product's Quality Rating. This is a numerical value entered in Item Management.

- **Show Product's Price Rating:** set to *Yes* to display the Product's Price Rating. This is a numerical value entered in Item Management.

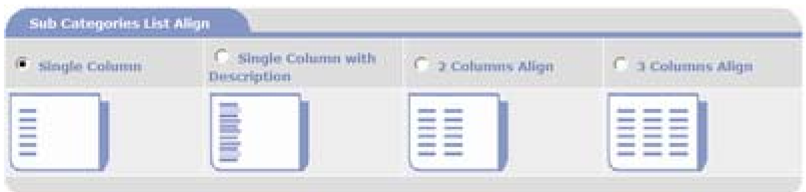
- **Show Product's Value Rating:** set to *Yes* to display the Product's Value Rating. This is a numerical value entered in Item Management.

- **Show Product's Colors:** set to *Yes* to display color swatches in the Product Info section for each available color.

- **Max Product's Colors in a Row:** if Show Product's Colors is set to *Yes*, enter the number of colors to display per row in the Product Info Section.

- **Show Detail Categories:** use to select a Product Detail Category to display. Up to three Product Detail Categories may be selected for display in the Product Catalog Listing.

Sub Categories List Align:



- Used to select one of the following options for how Categories are listed:

  - **Single Column:** displays a single column of Category Names.

  - **Single Column with Description:** displays a single column of Category Names with the Categories Short Description displayed below the Category Name.

  - **2 Columns Align:** displays the Category Names in two columns.

  - **3 Columns Align:** displays the Category Names in three columns.

- Copy Selected Category: click on this option to create a new category by copying the selected (highlighted) category in the category list. This option displays the

Products Category:

- **Category Name:** used to change the name of the copied category.

- **Short Description:** used to change the short description of the copied category.
- **Long Description:** used to change the long description of the copied category.
- **Picture:** displays the original file name of the image, if one has been uploaded for the category.
- **Update Image:** used to upload an image. Click on Browse... to select a new image file.
- **Sort Order:** used to control the order of categories and sub-categories within the catalog. When set to *0*, the categories are sorted alphabetically.

Copy Category Options:

- **Copy All Sub Categories:** set to *Yes* to copy all sub-categories of the copied category. Set to *No* to just copy the selected category.
- **Copy Products:** set to *Yes* to copy all products assigned to the copied category. If Copy All Sub Categories is set to *Yes*, it will copy products for them also. Set to *No* to leave Category empty when copied.

▪ Move Selected Category: click on this option to move the selected (highlighted) category to another location.

- : The Paste icon option is displayed after selecting the category to move. You must highlight the category to move to and click this option.

▪ Add Product to Selected Category: click on this option to add Items to the category selected (highlighted) in the category list. This displays the Product Search page as follows:

- o For an explanation of the Product Search see the Search For Product Items page section of this chapter.

- o **Select:** checkbox used to check each item to be added to the Category.
- o Select All selects all Found Items.
- o Deselect All deselects all Found Items.
- o Update Category adds the selected Items to the Category.
- o Clear clears the search criteria.
- o Print prints the website page to the customer's local printer.
- o Cancel closes the page without saving or updating values.
- o Close on this page Close does same thing as Cancel.

- ▪ Edit the Selected Product: click on this option to retrieve the selected Item (highlighted in the category Contents column) in Item Management.
- ▪ Remove the Selected Product from Catalog: click on this option to remove the selected Item (highlighted in the category Contents column) from the Category.

1.4 Feature Administration

Before making your site available to Customers for Shopping, you must perform the following:

- ▪ Configure GL Features defining GL Account Types and GL Accounts
- ▪ Configure Order Features

- Define Credit Terms
- Configure Sales Tax
- Define Shipping Carriers, Methods, & Fees
- Configure Product & Inventory Features
- Define Product Unit Types
- Define Product categorizations including:
    - Product Brands
    - Product Classifications
    - Product Types
    - Detail Categories
- Create Contact Company records for Vendors and Manufacturers
- Configure Payment Features
- Create Item record for each Product
- Enter Initial Inventory quantities if using Inventory Control features.
- Define Shopping Catalog Product Categories
- Assign Products to Shopping Catalog Product Categories

It is also a good idea to define a Quick Registration form for new customer registration.

If you are going to offer special pricing to select groups of customers or if you are going to offer quantity level pricing you will need to define Price Groups.

If you are going to display Comparable Products you will need to define Comparable Brands.

If you are going to display Document Collections as part of your Product Details you will need to define Related Document Types (Document Collection Categories).

If you are going to offer downloading of digital products you will need to configure Product Downloads. Product Downloads is configured from Product & Inventory Features Management.

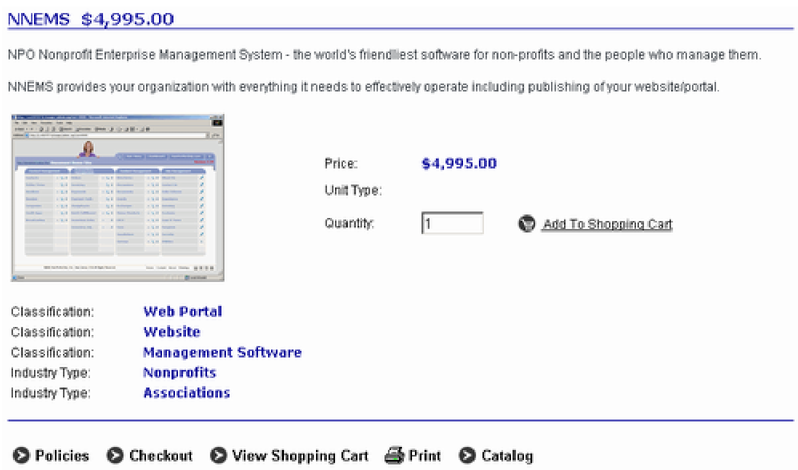
1.5 Tutorials

The following are tutorials for the various tasks necessary to maintain and manage your products and shopping catalog.

1.5.1 How to Purchase Products from the Product Catalog:

Describes step-by-step how customers purchase products from the Product Catalog. Once the customer selects a product there are five major steps (pages) to complete the checkout (purchase) process. The process for requesting a quote and placing a bid are described in separate sections of this chapter.

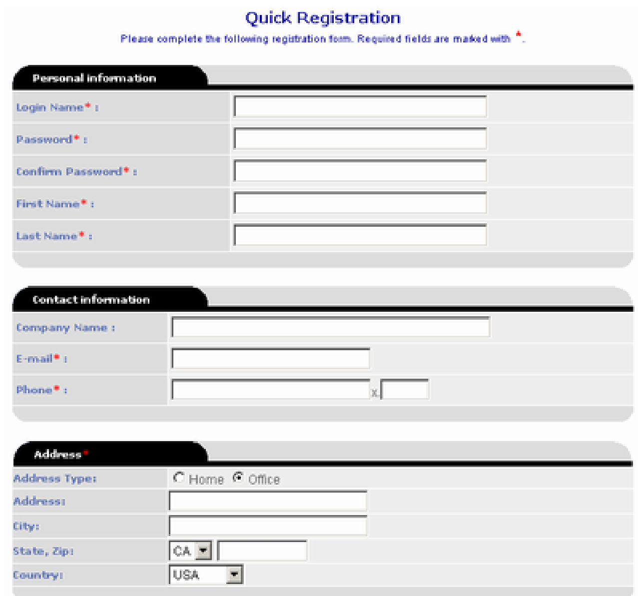
- The Customer browses the Product Catalog and clicks on a Product to view its Product Detail page.
- The Product Detail page provides detailed information about the Product along with various options as shown below.



- One of the options is the purchase quantity. The customer may select a different quantity than the default value of *1*.
- If the product is available in different colors and sizes, the customer may select from the available choices.
- When finished selecting options, the customer clicks Add To Shopping Cart .

a. The first time the customers adds an Item to their Shopping Cart, PORTALPRODIGY will prompt them to login or signup.

- First time customers need to click on first time users Sign up here option.
- The first time customer is then presented with the Registration page that has been defined in Signup Features Management.


Quick Registration

Please complete the following registration form. Required fields are marked with *.

Personal information

Login Name* :	
Password* :	
Confirm Password* :	
First Name* :	
Last Name* :	

Contact information

Company Name :	
E-mail* :	
Phone* :	x

Address*

Address Type:	Home Office
Address:	
City:	
State, Zip:	CA
Country:	USA

- The customer must complete all fields marked with a red asterisk.
- When finished completing the form, the customer clicks **Done** to save the page and return to the Product Catalog.
- At any time the customer may view their shopping cart by clicking **Shopping Cart**.

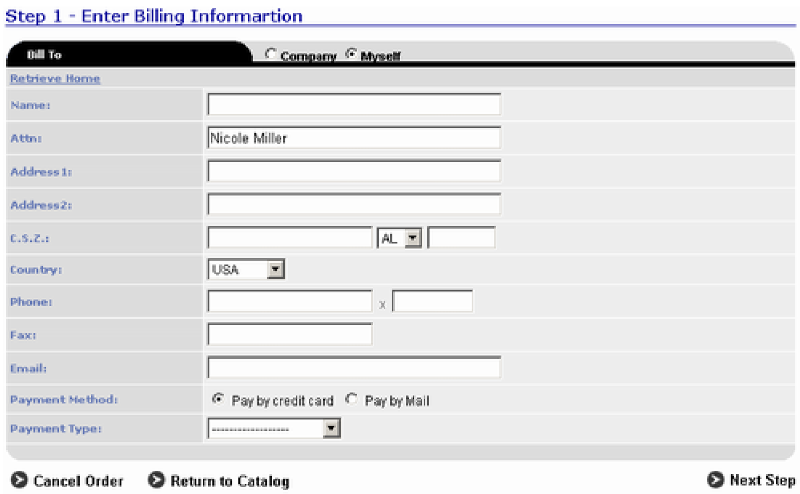

Cart Details

Quantity	Part #	Product	Unit Price	Extended Price
1	NPO-007	NNEMS	$4,995.00	$4,995.00

- When the customer is finished shopping they clicks **CheckOut** to complete the order process.
- The customer may view their cart first or proceed directly to checkout. Click on Checkout button to proceed directly to checkout.

- The customer is prompted asking them if their order is for their Company/Organization. The customer clicks "Yes" if for "Company/Organization" and "No" for an individual.

- The customer must now complete **<u>Step 1: Enter Billing Information page</u>**.



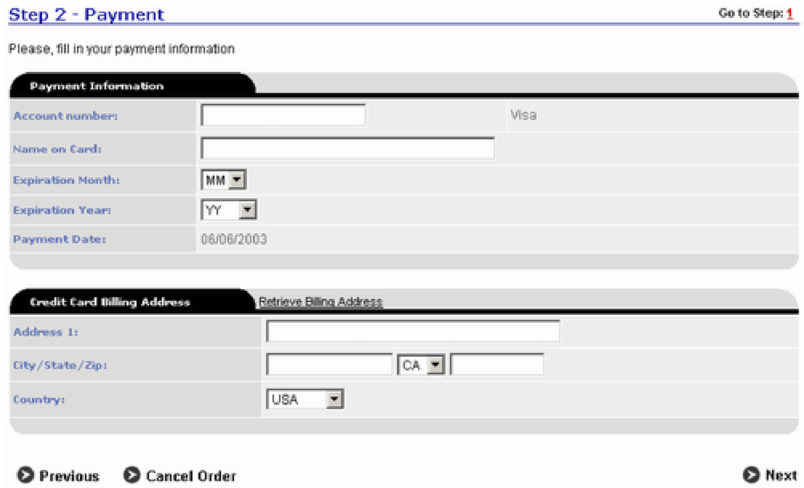
- The customer may click on <u>Retrieve Home</u> or <u>Retrieve Office</u> links to auto-fill from their Contact record which is created as a result of the Registration (Signup) process.

- The customer may select a Payment Method or select the default. The available Payment Methods are defined in Site Administration.

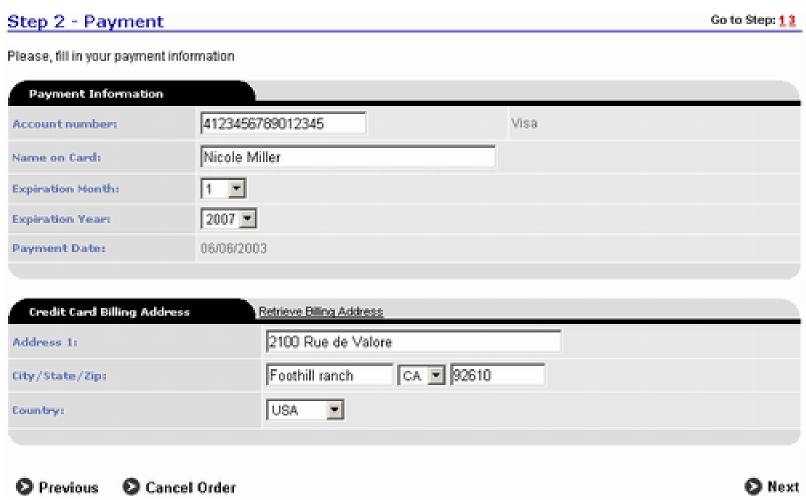
- The customer must select a Payment Type from the available list, such as “American Express”, “Master Card”, or “Visa”. Payment Types are defined in Site Administration.

- When finished completing the Billing Information page, the customer clicks 
.

- Now the customer must complete **<u>Step 2: Payment page</u>**.

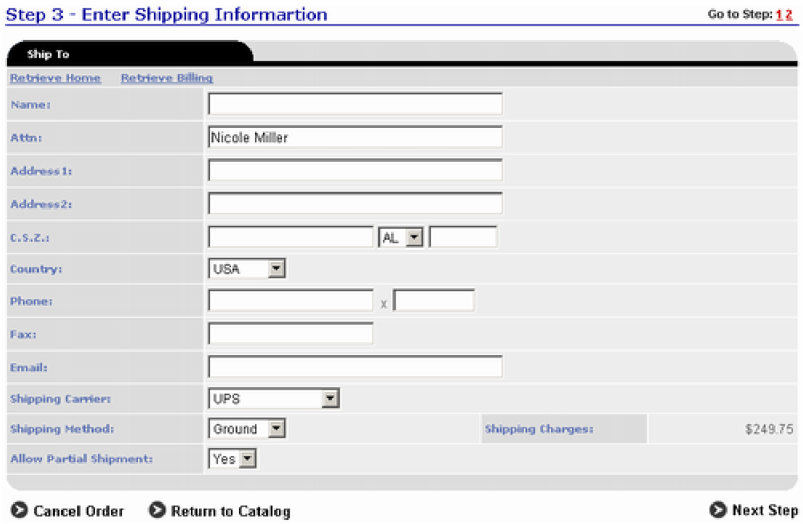


- The information requested on the Payment page is dependent on the Payment Method selected by the customer in Step 1. Whether the Credit Card Billing Address is included is dependent on the settings in Payments Features Administration. The customer may click the Retrieve Billing Address option to copy the Billing Address from Step 1; otherwise the customer must enter their credit card billing address.

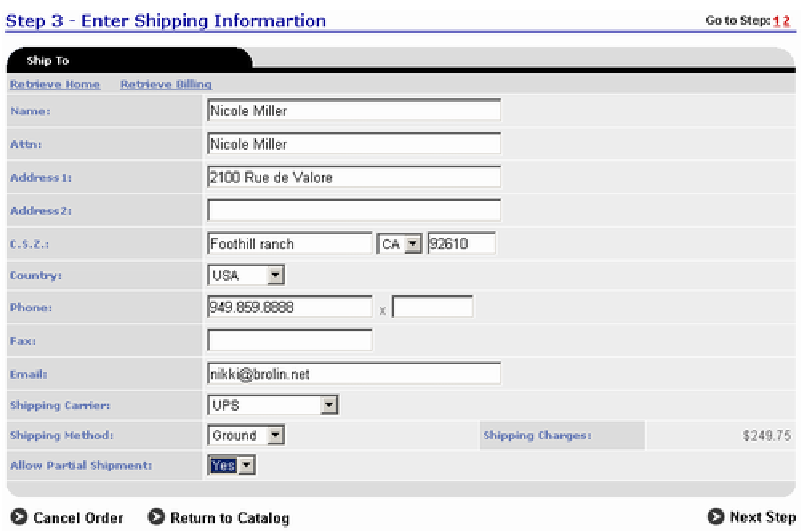


- When finished completing the Payment information page, the customer clicks **Next**.

- If Automated Card Authorization is turned on, the customer will be prompted with the message "Please wait while authorizing your credit card transaction". If the transaction is declined or an error occurs, an explanation message will be displayed along with appropriate instructions; otherwise the Customer will be asked to complete **Step 3: Enter Shipping Information page**.



- The customer may click on <u>Retrieve Home</u> , <u>Retrieve Office</u> or <u>Retrieve Billing</u> links to auto-fill the required information.



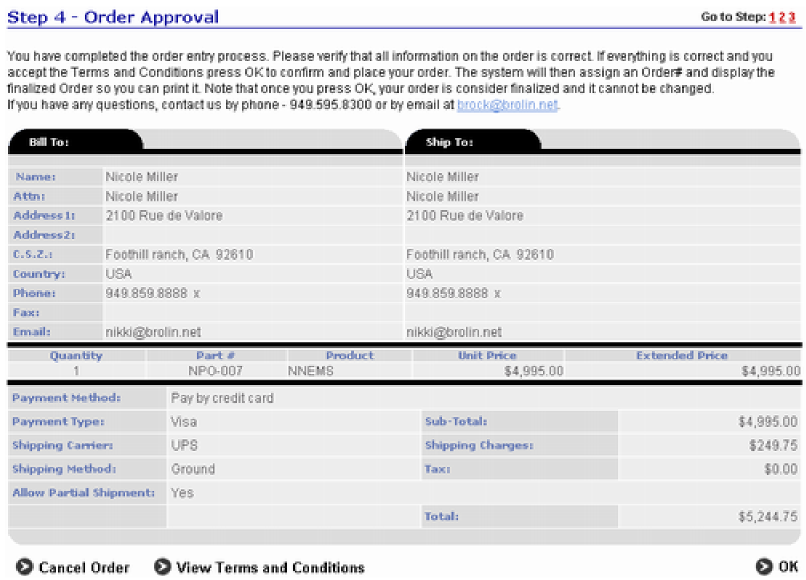
- The customer may select a Shipping Carrier or select the default. When a different Carrier is selected, the available Shipping Methods change according to the selected Carrier. The available Shipping Carriers and Methods are defined in Site Administration Shipping Carriers Feature Management.

- The customer may select a different Shipping Method or accept the default. Each time either the Shipping Carrier or Method are changed, the Shipping Charges are automatically recalculated.

- If Prompt Customer for Partial Shipment is turned on in Site Administration Product Features Management, the "Allow Partial Shipment" option is included in the page. The Customer may accept the default of "Yes" or change to "No".

- When finished completing the Shipping Information page, the customer clicks **Next Step**.

- From the **Step: 4 Order Approval page**, the customer may click on View Terms and Conditions.



Step 4 - Order Approval

Go to Step: 1 2 3

You have completed the order entry process. Please verify that all information on the order is correct. If everything is correct and you accept the Terms and Conditions press OK to confirm and place your order. The system will then assign an Order# and display the finalized Order so you can print it. Note that once you press OK, your order is consider finalized and it cannot be changed.
If you have any questions, contact us by phone - 949.595.8300 or by email at brock@brolin.net.

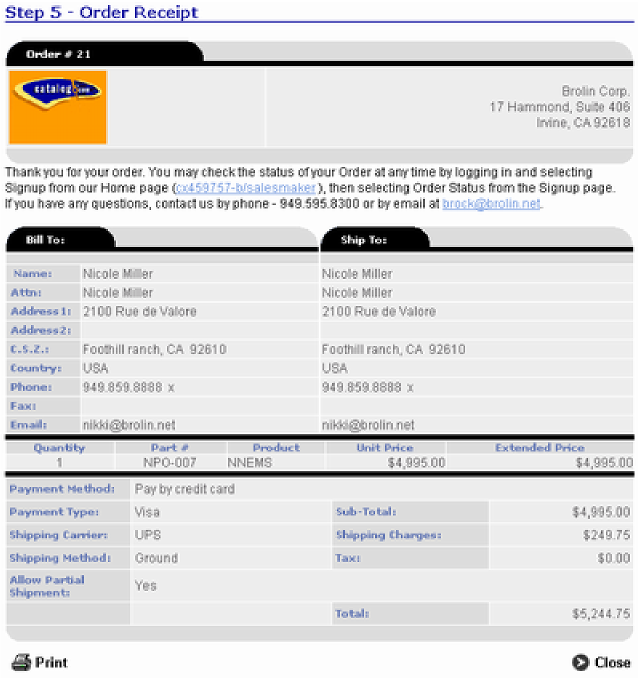
	Bill To:	Ship To:
Name:	Nicole Miller	Nicole Miller
Attn:	Nicole Miller	Nicole Miller
Address1:	2100 Rue de Valore	2100 Rue de Valore
Address2:		
C.S.Z.:	Foothill ranch, CA 92610	Foothill ranch, CA 92610
Country:	USA	USA
Phone:	949.859.8888 x	949.859.8888 x
Fax:		
Email:	nikki@brolin.net	nikki@brolin.net

Quantity	Part #	Product	Unit Price	Extended Price
1	NPO-007	NNEMS	$4,995.00	$4,995.00

Payment Method:	Pay by credit card		
Payment Type:	Visa	Sub-Total:	$4,995.00
Shipping Carrier:	UPS	Shipping Charges:	$249.75
Shipping Method:	Ground	Tax:	$0.00
Allow Partial Shipment:	Yes		
		Total:	$5,244.75

Cancel Order View Terms and Conditions OK

- To complete the checkout process the customer is required to approve their order by pressing **OK**. Once this step has been completed the order is finalized and the **Step 5: Order Receipt page** is displayed in a printer friendly format.



Step 5 - Order Receipt

Order # 21

Brolin Corp.
17 Hammond, Suite 406
Irvine, CA 92618

Thank you for your order. You may check the status of your Order at any time by logging in and selecting Signup from our Home page (cx459757-b/salesmaker), then selecting Order Status from the Signup page. If you have any questions, contact us by phone - 949.595.8300 or by email at brock@brolin.net.

	Bill To:	Ship To:
Name:	Nicole Miller	Nicole Miller
Attn:	Nicole Miller	Nicole Miller
Address1:	2100 Rue de Valore	2100 Rue de Valore
Address2:		
C.S.Z.:	Foothill ranch, CA 92610	Foothill ranch, CA 92610
Country:	USA	USA
Phone:	949.859.8888 x	949.859.8888 x
Fax:		
Email:	nikki@brolin.net	nikki@brolin.net

Quantity	Part #	Product	Unit Price	Extended Price
1	NPO-007	NNEMS	$4,995.00	$4,995.00

Payment Method:	Pay by credit card		
Payment Type:	Visa	Sub-Total:	$4,995.00
Shipping Carrier:	UPS	Shipping Charges:	$249.75
Shipping Method:	Ground	Tax:	$0.00
Allow Partial Shipment:	Yes		
		Total:	$5,244.75

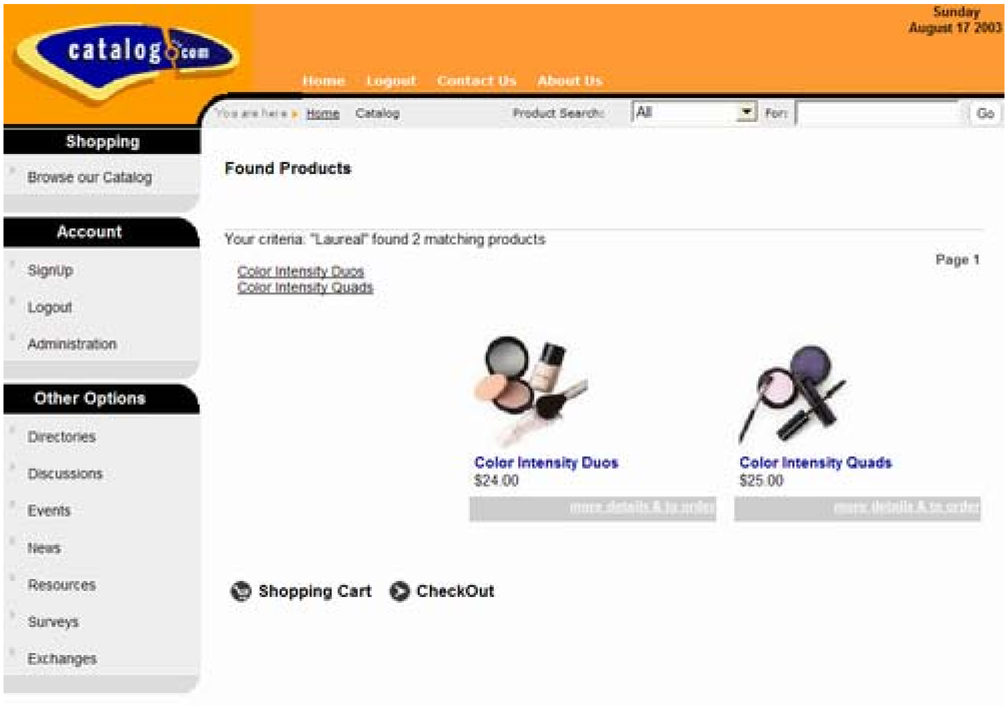
Print Close

- The customer may print their Order Receipt then click **Close** to return to exit the checkout process.

1.5.2 How to Use Shopping Catalog Product Search:

Using Product Search, Customers may perform a broad search for Products with the *All* Search Category (default) or narrower search by selecting a specific Search Category. To use the Product Search feature:

- Select a Search Category from the drop down list or leave the default value of *All*.
- Enter a keyword or phrase in the text box.
- Click **Go** to perform a search.
- PORTALPRODIGY will locate all Products that begin with the entered keyword or phrase and display the results as shown below:



Product Search is configured by a permitted Administrator by first using Product Detail Categories Management to define Product Categories, then using Items Management to enter keywords for each Product. Search results are formatted according to the configuration of the Product Catalog Category ***Found Products****. Product Name, Short Description, Description 1, and Description 2 are automatically indexed and made searchable using Product Search.*

1.5.3 How to Add a New Product:

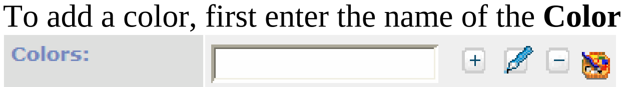
The first step is to create an Item record using Item Management. If you use PORTALPRODIGY Inventory Control then the next step is to enter the quantity on hand using Inventory Entry. The final step is to publish the Item (Product) in the Product Catalog.

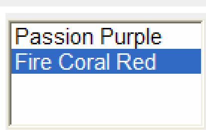
- From the Site Administration Menu 

 option, click on the + icon.

Note: don't be put off by the long scrolling Item Management page and its many fields. The only field that requires you to enter a value is the **Product Name** field. All other fields are optional.

- Leave **Feature** field set to *Products* (the default value) and **Type** field set to *Product* (the default value).

- Enter a unique name in the **Product Name** field. This is the name that will be displayed in the Product Catalog.
- Enter the price you are selling the product for into the **Sales Price** field. This is the dollar amount for a single unit. Use a decimal for cents.
- If your organization offers quantity level pricing or special pricing for selected groups of customers, you need to configure Price Group Pricing. For detailed instructions see the section of this chapter titled How to Setup Customer Price Groups and Volume Pricing:
- If your organization uses part numbers or SKUs, enter it in the **Product Code** field. Although a value is not required, if you enter one it must be unique.
- If you are offering a sales price at a discount to the list price and want to show the comparison, enter the **List Price**.
- If you are using **Product Types** select one from the list box.
- If you want to specify the cost for the item, enter the unit **Cost** and set **Costing Method** to *Specified Cost*. If you want to use the average cost and you have the Initial Inventory Entry enabled, then you may enter the unit **Cost**; otherwise, leave blank as the **Cost** will be calculated by the system each time new quantities of the Item are received in Inventory.
- If you have setup Manufacturers select the products **Manufacturer** from the list box and optionally enter the **Manufacturers Model Number** and **Manufacturers Product Code**.
- Select a **Unit Type** from the list box. Unit Type is displayed on the Product Details page.
- You may enter a **Shipping Weight** per unit of the Item. This should be entered in the same unit of measure that is used for Shipping Rates based on Weight. Typically this is entered in pounds and a decimal is used for ounces. You may use another unit of measure such as Kilograms. Just be sure to be consistent and use the same unit of measure for all Items.
- Select either *Average Cost* or *Specified Cost* in the **Costing Method** field. Currently these are the two Costing Methods supported by PORTALPRODIGY. It is a planned enhancement to add the following the additional costing methods: *LIFO* & *FIFO*.
- If the Item comes in different colors and sizes you need to separately define each color and size using the **Colors** and **Sizes** input fields.
    - To add a color, first enter the name of the **Color** in the text box 

then click the  button to add the item to the list control 

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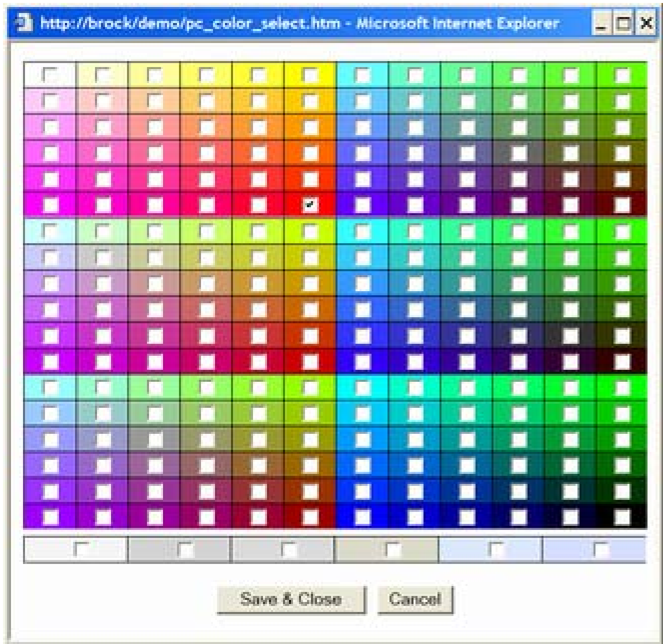
- o If you want to display sample color swatches in the Shopping Catalog then with the color highlighted in the list control, such as “Fire Coral Red” show above, click on to open the color palette pop-up window shown below.



- o Check the applicable color and click the Save & Close button. Note that the display of colors is dependent on each customers monitor, graphics chips, etc.

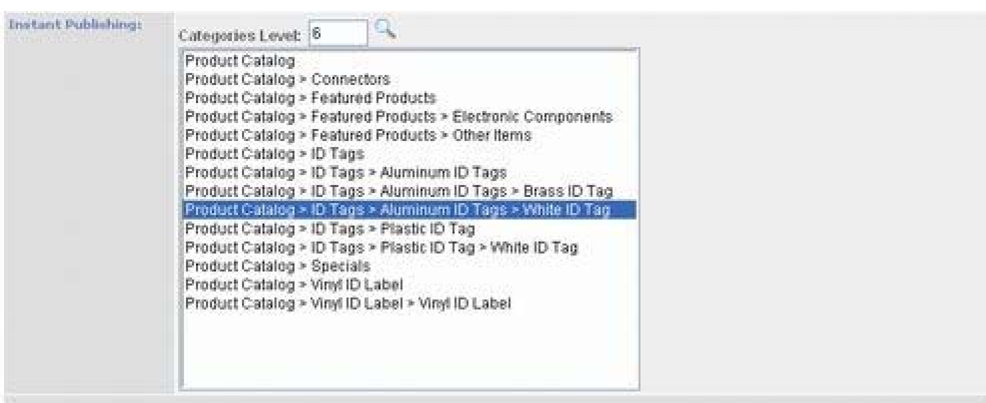
- o To add a size, first enter a description of the **Size** in the text box Sizes: then click the + button to add the item to the list control Small Medium Large.

▪ Enter a brief plain text description of the product in the **Short Description** field. The Short Description is displayed in the Product Catalog listings pages.

▪ Using either plain text or HTML enter a description of the product in the **Description 1** and **Description 2** fields. Both of these are displayed on the Product Detail page. The purpose of having two fields is to allow you to split the description into two different locations on the Product Detail page. E.g. you may enter a summary description of the product in **Description 1** which is displayed in the upper section of the Product Detail page and a detailed description such as bullet points of features, ingredients, etc. in **Description 2** which is displayed in the lower section of the Product Detail page. Use the HTML Editor option to create and edit the descriptions as HTML.

- Configure the **Options** section and **GL Accounts**. The GL Accounts default to the values specified in Product & Inventory Features Management.
- If you have set up Vendors, complete the **Purchasing** section.
- Define Keywords using the **Product Details** feature.

  - Select and click on a Category / Label to highlight it.
  - Enter the keyword or phrase into the Keyword/Value text box.
  - Click + option to add it to the Result Set.
  - Repeat for each Keyword / Value.



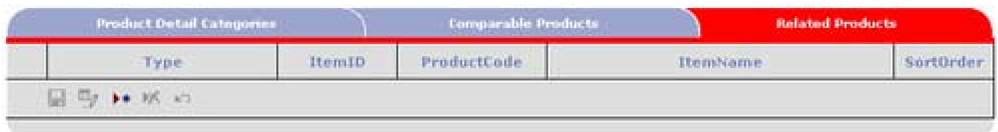
- If you know what Product Categories you want to publish the Item in, use **Instant Publishing** to select them.
  - To minimize page loads **Instant Publishing** initially lists just the first two levels of Categories in your Product Catalog. If you need to publish the Item below the second level, enter the **Categories Level** you want to publish to and click the icon to retrieve and display the additional levels.
  - Click on a Category to select it.
  - To select additional Categories hold down the Ctrl key when you click on a Category.

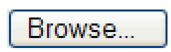
- Click on the 

button located at the bottom of the page or use the ***CTRL-ALT-S*** hotkey to save what you have entered thus far.

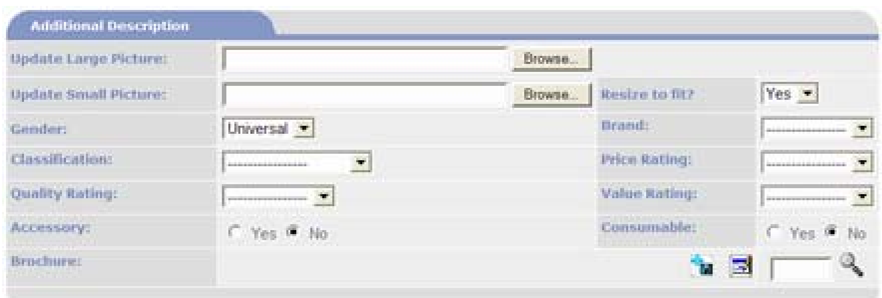
- If you want to enter comparable products, click on the **Comparable Products** tab. For detailed instructions see the section of this chapter titled How to Add Comparable Products:

- If you want to enter related products such as accessories, click on the **Related Products** tab. For detailed instructions see the section of this chapter titled How to Add Related Products:



- If you have a large picture of the product, click on the 

button to the right of the **Update Large Picture** textbox.



- Using the file dialog box select the file of the picture to upload.
- Repeat for **Small Picture**.
- Leave **Resize to Fit** set to *Yes*, which is the default value.
- If applicable select values for the other fields in **Additional Description** section.
- To add a **Brochure**:
  - Click on the  Add Brochure icon to upload a new brochure from you computer;
  - Or click on the  Edit Brochure icon to create a brochure using the PORTALPRODIGY Document Editor;

- Or enter a **Resource Document ID** in the text box to use an existing Brochure that is loaded in the Resource Document Library;

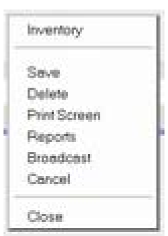
- Or click on the Search for Brochure Icon to find and link an existing Brochure that is in the Resource Document Library.

- If you want to display additional pictures of the Item, click Additional Pictures to load the pictures.

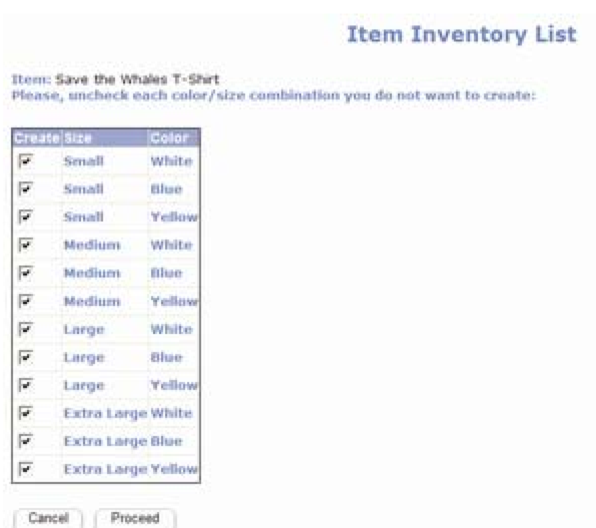
- If you want to attach documents to the Item such as specifications, white papers, and warranty information, click Document Collections to load the documents.

- Click the Save option button at the bottom of the page to save the Item.

Right Click Menu: you may right click anywhere on the Items Management page to display a pop-up menu as shown below that contains duplicates of the option buttons at the bottom of the page.



- If you created both **Sizes** and **Colors**, as part of the Save process PORTALPRODIGY displays the Item Inventory List page shown below:



Item Inventory List

Item: Save the Whales T-Shirt
Please, uncheck each color/size combination you do not want to create:

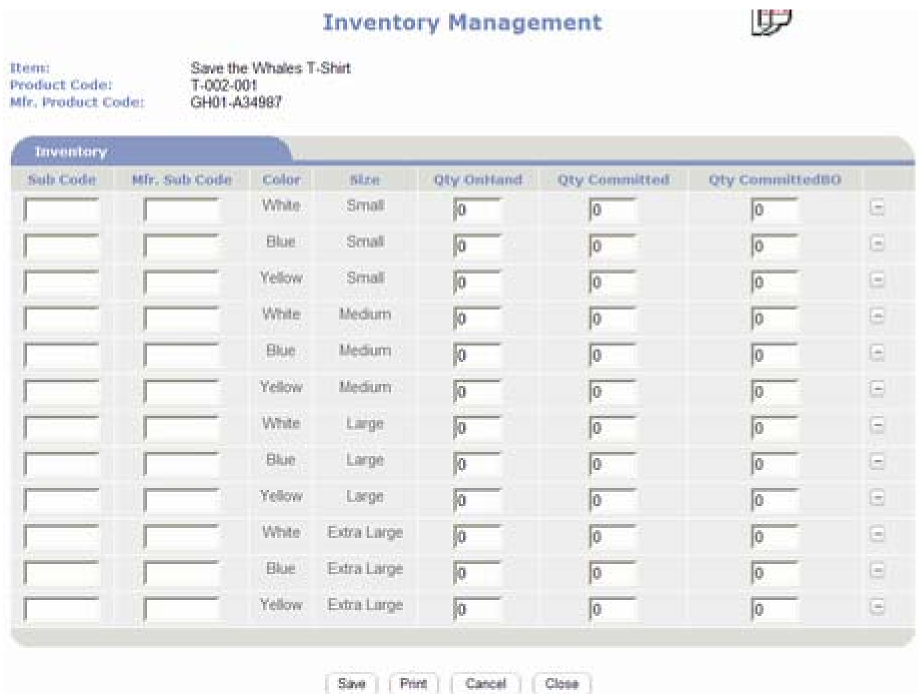
Create	Size	Color
☑	Small	White
☑	Small	Blue
☑	Small	Yellow
☑	Medium	White
☑	Medium	Blue
☑	Medium	Yellow
☑	Large	White
☑	Large	Blue
☑	Large	Yellow
☑	Extra Large	White
☑	Extra Large	Blue
☑	Extra Large	Yellow

Cancel Proceed

- o By default all combinations of sizes and colors are checked.
- o Uncheck each combination that you do want included in your Product Catalog.
- o Click Proceed to save.

▪ If you have the option to enter Initial Inventory turned on in Product & Inventory Features Management you may enter your initial inventory quantities as follows:

- o Click on the Inventory link displayed at the bottom of the Items Management page to display the Inventory Management page shown below.



Inventory Management

Item: Save the Whales T-Shirt
Product Code: T-002-001
Mfr. Product Code: GH01-A34987

Inventory

Sub Code	Mfr. Sub Code	Color	Size	Qty OnHand	Qty Committed	Qty CommittedBO
		White	Small	0	0	0
		Blue	Small	0	0	0
		Yellow	Small	0	0	0
		White	Medium	0	0	0
		Blue	Medium	0	0	0
		Yellow	Medium	0	0	0
		White	Large	0	0	0
		Blue	Large	0	0	0
		Yellow	Large	0	0	0
		White	Extra Large	0	0	0
		Blue	Extra Large	0	0	0
		Yellow	Extra Large	0	0	0

Save Print Cancel Close

- o If you are using **Produce Codes**, enter a **Sub Code** for each color / size combination.
- o You may also the manufacturers sub code in **Mfr Sub Code** for each color / size combination.
- o Enter the current quantity on hand into the **Qty. OnHand** field for each color / size combination.
- o Enter the current quantity of your Qty. OnHand that is committed to orders into the **Qty. Committed** field for each color / size combination.
- o Enter the current quantity that is committed to orders that is not on hand (on backorder) into the **Qty. CommittedBO** field for each color / size combination.

- When finished click Close and confirm save.

- PORTALPRODIGY returns to the Item Management page. If finished entering Item information, you can click Close .

1.5.4 How to Delete an Existing Product:

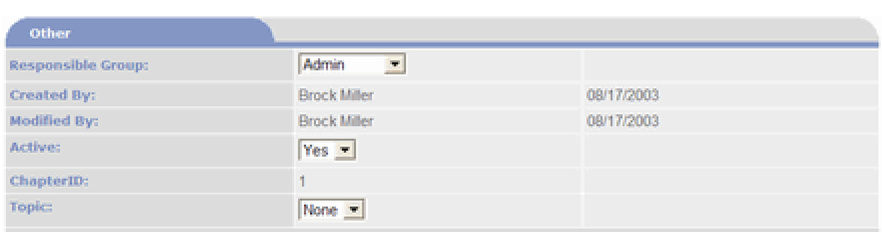
PORTALPRODIGY only allows deletion of Items that have no related Transactions. Once an Item has related Transactions you can deactivate the Item which causes the Item to be removed from your Product Catalog, but the Item will remain accessible for reactivation and for reporting purposes.

To Delete an Item:

- From the Site Administration Menu Items/Products option, click on the icon to retrieve the Search for Product Items page.
- Use the Search for Product Items page to locate the Item.
- Click on the Item in the Found Items grid.
- With the Item displayed in Items Management page click on Delete option button located at the bottom of the page.
- Confirm deletion.
- PORTALPRODIGY will delete the Item and return to the Search for Product Items page.

To Deactivate an Item:

- Use the Search for Product Items page to locate the Item.
- Click on the Item in the Found Items grid.
- With the Item displayed in Items Management page, scroll down to the Other section shown below.



- Click on the Active: Yes list box and select *No*
- PORTALPRODIGY will prompt you to confirm the deactivation as shown below.

- Click Yes to confirm the deactivation.
- Click Close option button located at the bottom of the Item Management page and confirm save.
- The Item is now deactivated and PORTALPRODIGY will return to the Search for Product Items page.

To Reactivate a Deactivated Item:

- Go to the Search for Product Items page.
- Check Include deactviated records in search results .
- Enter any other applicable search criteria then click Search .
- Click on the Item in the Found Items grid that you want to reactivate.
- With the Item displayed in Items Management page, scroll down to the Other section.
- Click on the Active: Yes list box and select *Yes*.
- Click Close option button located at the bottom of the Item Management page and confirm save.
- The Item is reactivated and PORTALPRODIGY will return to the Search for Product Items page.

1.5.5 How to Edit an Existing Product:

- From the Site Administration Menu **Items/Products** option, click on the icon to retrieve the Search for Product Items page.
- Use the Search for Product Items page to locate the Item.
- In the Found Items grid click on the Item you want to edit.
- The Item is displayed in the Item Management page for editing.
- When finished with your edits, click **Close** option button located at the bottom of the Item Management page and confirm save.

1.5.6 How to Setup Customer Price Groups and Volume Pricing:

1. Read chapter of Administrator Manual titled "Item/Products Catalog Features in Detail".
2. Go to Site Administration Menu.
3. Click on the Features Go To icon located in the Site Management section.
4. Click on Product & Inventory link to go to the Product & Inventory Features Management page.
5. Click on the Price Groups link to go to the Price Groups Management page.
6. Click Add New Price Group link.
7. Enter a Description.
8. Select a Default Method. The following choices are available:
    a. Specified Price – used to specify a specific price.
    b. % Discount List Price – used to calculate a price as percentage off of the List Price.
    c. % Discount Sales Price – used to calculate a price as a percentage off of the Sales Price.
    d. % Markup Cost – used to calculate a price as cost plus a percentage markup.
9. Click Save button to save.
10. Repeat that last four steps to add additional Price Groups.

11. When finished adding Price Groups go to Item Management and either add a new product Item or retrieve an existing one. Read tutorial titled "Create a New Product Item Record".

12. Click on <u>Price Group Pricing</u> link.

13. Select a Price Group from the list box.

14. Select a Method.

15. To define volume pricing repeat the following steps for each quantity range. To define a single price regardless of quantity purchased perform the following steps once.

    a. In the Prices grid click on the Add New Record icon, located on the bottom of the grid. This inserts a row in the grid.

    b. Enter a quantity in the Qty. From field.

    c. Enter a quantity in the Qty. To field.

    d. Depending on the Method selected either, enter a price, a percentage markup, or percentage discount. Percentages are entered as follows:

        - 10 for 10%
        - 10.75 for 10.75%

    e. Click the Save Record icon, located on the bottom of the grid, to save the record.

16. Repeat the above steps for each Price Group. The Copy From list box can be used to copy the Pricing records from other Price Groups. To use the Copy From:

    a. Select the Price Group that you want to create prices for (copy to).

    b. Select a Copy From price group.

    c. Click the Save button. This copies the price records and automatically saves them.

    d. If applicable, you may edit the Price records by clicking on a Price record in the grid, then clicking the Edit Current Record icon, located at the bottom of the grid.

    e. When finished making changes to the price record, click the Save record icon, located at the bottom of the grid.

17. Click the Close button when finished.

1.5.7 How to Setup Product Downloads

1. Prerequisites that directly pertain to setup of Product Downloads include:

    a. Read chapter of Administrator Manual titled "Broadcasting Features in Detail".

    b. Product & Inventory is configured as described in the tutorial titled "Setup a Product Catalog and Online Shopping".

    c. Read chapter of Administrator Manual titled "Item/Products Catalog Features in Detail".

    d. Read tutorial titled "Create a New Product Item Record".

2. Go to Site Administration Menu.

3. Click on the Broadcasting Add icon located in the Contact Management section.

4. The following steps will guide you through process to create a template that will be used to send an email to the customer, upon approval of the customer's order and payment for downloadable products.

    a. Set Type to "Email".

    b. Enter a valid email address for your organization.

    c. Enter a Subject, e.g. "Portal Prodigy Product Download"

    d. Set Body Format to "TXT".

    e. Set Object Type to "Downloads".

    f. Create the Message. It should contain:

        - A <%DOWNLOADS:DownloadLink%> tag for the download ink;
        - A <%DOWNLOADS:DownloadID%> tag for the download code;
        - Instructions for downloading the product item;
        - Any other instructions deemed applicable;

    Example of a download template Message:

    Dear <%CONTACT:FirstName%>,

    To download your software go to <%DOWNLOADS:DownloadLink%> and enter the following Code: <%DOWNLOADS:DownloadID%>

For assistance please contact us by email at support@brolin.net or by phone 949.595.8300

g. Click the Close button and confirm save.

5. Go to Site Administration Menu.

6. Click on the Features Go To icon located in the Site Management section.

7. Click on Product & Inventory link to go to the Product & Inventory Features Management page.

8. In the Product Downloads section, Set Enable to “Yes”.

9. Select the Broadcast Template that was created in the previous steps.

10. Enter a Days Active number. This sets the number of days that a Product Code remains active from the date it is issued. E.g. set it to “30” to allow customers thirty days to download their product.

11. Enter a Download Limit number. This is the number of times during the Active period that the customer may download the product. E.g. set to “3” to allow the customer to download the Product three times.

12. Enter Download Instructions to be displayed on the Product Download page. This is the website page the customer is taken to when they click on the link in the email that is broadcast to them. The customer enters the Download Code into this page and if the code is valid, the download process is initiated.

13. Click Close and confirm to save.

14. Go to Site Administration Menu.

15. Follow the steps outlined in the tutorial titled “Create a New Product Item Record” to create a new Item record or click on the Items/Products browse icon, located in the Content Management section, to use the Search for Products to select an existing Product Item.

16. Using Item Management configure the Download section as follows:

    a. Set Offer this Product as Download to “Yes”.

    b. Click on the Add Document icon to upload the Product Item file to the website.

    c. On the Product Download page, click Browse.

    d. Click Close to initiate upload.

    e. When prompted to save changes, click Ok.

f. When prompted with Do you agree to upload? Click Ok.

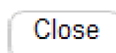
g. When prompted with message that file was uploaded successfully! Click Ok. You will be returned to the Item Management page.

h. Either accept the default Download Template or select a different one. This will default to the template set in Product & Inventory Features Management.

17. When finished setting with Item Management, click the Close button and confirm to save.

1.5.8 How to Add Comparable Products:

Use to enter and edit Comparable Products. Comparable Products are competing items from other manufacturers or vendors that you want to compare your product to. Unlike Related Products, you do not have to create Item records for each Comparable Product.

- Go to Features Management
- Click on Product & Inventory Features Management.
- Follow the instructions outlined in the section of this chapter titled Product & Inventory Feature Management page to configure Item Comparison.
- When finished configuring Item Comparison click 

option button located at the bottom of the page and confirm save.
- You are now ready to enter Comparable Products for your Items.
- For each Item that you want Comparable Products, repeat the following steps:
  - o Using Search for Products, retrieve the Item record in Item Management.
  - o Click on the 

tab.

  - o For each Comparable Product repeat the following steps:

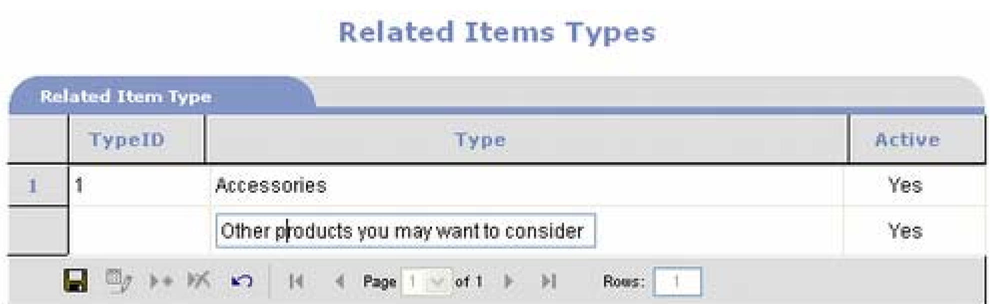
- Click on to add a new record.
- Select a **Comparable Brand** using the list box.
- Enter the **Comparable Products Part#**.
- Enter the **Comparable Price**. This is your competitor's sales price.
- Click to save the record.

o Close the Item record.

1.5.9 How to Add Related Products:

Use to display accessories, suggested alternatives, etc. on the Product Detail page. Related Products are listed by category and includes option to specify purchase quantity and add to cart.

- Each Related Product must have its own Item record. To create and Item record for each Related Product, follow the steps outlined in the section of this chapter titled How to Add A New Product.
- Next you need to define Related Item Types.
- Go to Features Management
- Click on Product & Inventory Features Management.
- Click on Related Items Types .

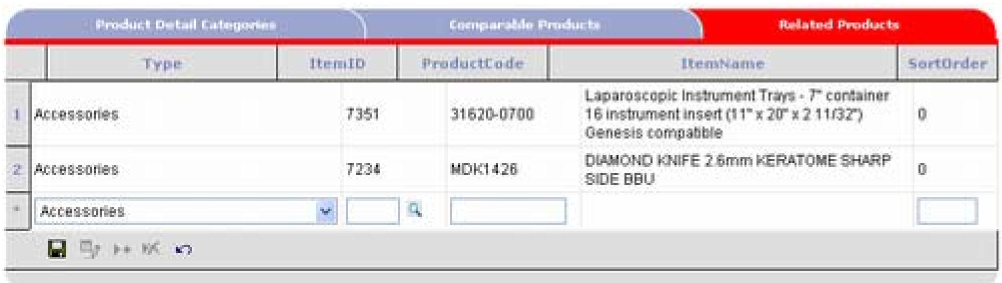


- For each Related Item Type you want to create repeat the following steps:

o Click on to add a new type.

- o Enter its name in the Type column.
- o Click to save the new Type.

- When finished creating Related Item Types you are ready to select Related Items for your products.
- For each Item that you want to display related Items, repeat the following steps:
  - o Using Search for Products, retrieve the Item record in Item Management.
  - o Click on the Related Products tab.



  - o For each Related Item repeat the following steps:
    - Click on to add a new type.
    - Select a Related Products Type (category) using the list box.
    - Specify the Related Item using any of the following three methods:
      - Enter the Related Product's Item ID.
      - Use the lookup option to search for and select an Item.
      - Enter a Product Code in the next column's text box.
    - If you want to control the sort order enter a sort value otherwise leave blank or set to 0. When set to 0 (or blank) it will be sorted alphabetically.
    - Click to save the new Type.
  - o Close the Item record.

1.5.10 How to Import Products:

Use to create new Item records and edit existing Item records by importing from a CSV (comma delimited file). PortalProdigy offers two different product import methods, a simple import and an advanced import.

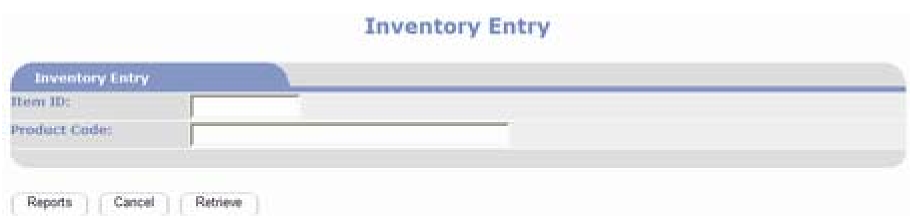
- For how to used the simple import see the Quick Tutorial titled **Import Products**.
- For how to used the advanced import see the Quick Tutorial titled **Advanced Import Products**.

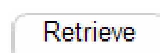
1.5.11 How to Receive Goods into Inventory:

Used to update inventory when goods are received. When receiving inventory each Item must have an existing Item record. If not, use Item Management to create the Item records.

- From the Site Administration Menu 

click on  to add new inventory.



- For each Inventory Item received:
  - Either enter the Item ID or the Product Code, then click 

.
  - In the page shown below, enter the Unit Cost of the new quantities received.

Inventory Entry

Item: Save the Whales T-Shirt
Product Code: T-002-001
Mfr. Product Code: GH01-A34987
Unit Cost:

Inventory

Sub Code	Mfr. Sub Code	Color	Size	Qty OnHand	Qty Committed	Qty CommittedBO	Qty Received
-001	-001	White	Small	10	0	0	
		Blue	Small	5	0	0	
		Yellow	Small	5	0	0	
		White	Medium	10	0	0	
		Blue	Medium	10	0	0	
		Yellow	Medium	10	0	0	
		White	Large	10	0	0	
		Blue	Large	10	0	0	
		Yellow	Large	10	0	0	
		White	Extra Large	10	0	0	
		Blue	Extra Large	10	0	0	
		Yellow	Extra Large	10	0	0	

Save and Process | Print | Cancel | Close

- Enter the quantity received for each combination of color and size. Quantities should be entered in same Unit Quantity specified for the Item in Item Management.
- Click Save and Process when finished entering the quantities received.
- PORTALPRODIGY update the Item's inventory and is ready for entry of the next Item.

1.5.12 How to Adjust Inventory:

Used to account for inventory shortages due to theft, damage, or other loss. Do not use for recording sales or receiving of goods.

- From the Site Administration Menu Inventory Adj. click on + to add an adjustment entry.

Inventory Entry

Inventory Entry

Item ID:
Product Code:

Reports | Cancel | Retrieve

- For each Inventory Item requiring adjustment:
  - Either enter the Item ID or the Product Code, then click Retrieve .
  - Enter the quantity into Quantity Adjusted for each combination of color and size to be adjusted. Quantities should be entered in same Unit Quantity specified for the Item in Item Management. Enter as negative number to reduce inventory quantity. Enter as positive number to increase inventory quantity.

  - You may also enter an explanation for the adjustment in the Reason memo field.
  - Click Save and Process when finished entering the quantities received.
  - PORTALPRODIGY update the Item's inventory and is ready for entry of the next Item.

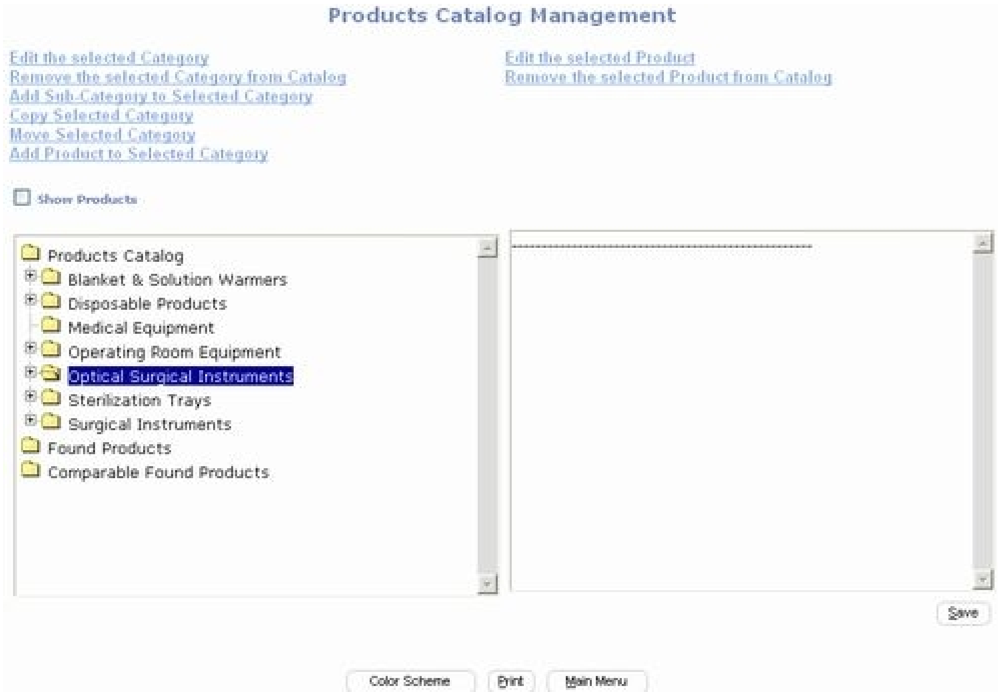
1.5.13 How to Create New Shopping Catalog Categories:

This tutorial describes how to build a conveniently organized shopping catalog that organizes your products by categories. It allows you to create a hierarchal product catalog with an unlimited number of levels and an unlimited number of categories within each level. Product Items can be placed in multiple categories. E.g. you may want to place "King Louis XIV Armoire" in both the "Armoires" and "King Louis XIV Furniture" categories.

Portal Prodigy provides a number of different options that allow you to customize the style and layout of each category. Differentiating your categories keeps your catalog interesting.

Pre-requisite: The feature Enable Advanced Product Catalog must be set to *Yes* in the Product & Inventory Features Management page in order to access the Product Catalog Management features.

- From the Site Administration Menu  option, click  to display the Product Catalog Management page.



- The Catalog automatically contains the following pre-defined categories:

    - **Products Catalog** – this is the top level of your product catalog. All categories and levels you add are inserted below this category.

    - **Found Products** – this is a special category used by the Search For Products Feature. It allows you to configure the Search For Products results page. Do not insert categories below this special category.

    - **Comparable Found Products** – this is a special category used by the Search for Comparable Products Feature. It allows you to configure the Search for Comparable Products results page. It is only shown when the Comparable Products feature is enabled. Do not insert categories below this special category.

- Highlight Products Catalog as shown below.

- Click Add Sub-Category to Selected Category option. This will display the Products Category Management page displayed below.

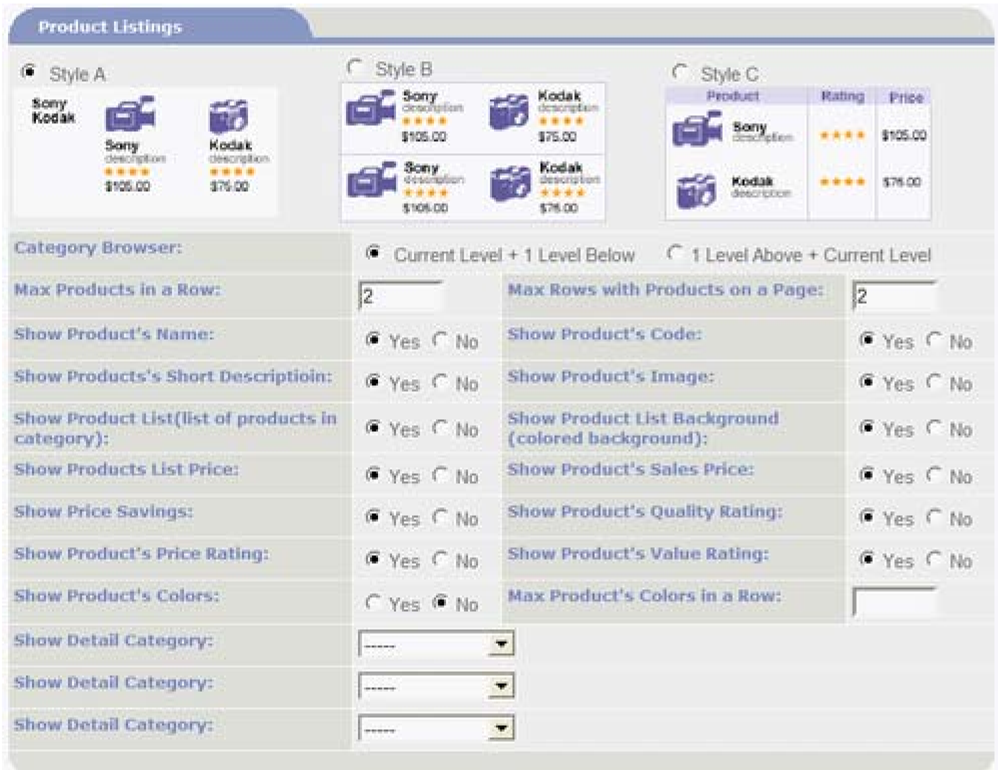
- There are three parts to configuring a Category:
  - Part 1 – describe the category.
  - Part 2 – configure how products are to be displayed within the category.
  - Part 3 – configure how sub categories are to be displayed within the category.

Part 1- Describe the Category:

- Enter the Category Name that you want displayed as the page title for this category. This is also the name that is shown in category listings.
- Enter a Short Description of the category. This must be no more than 255 characters. The Short Description can be displayed below the Category Name on category listings.
- Enter a Long Description to be displayed at the top of the Category page.
- If you want to display a picture along with the description at the top of the Category page use the Browse... button to open the Choose File window and select either a JPG or GIF image from your computer.
- Enter a number corresponding to the order position you want this category to be listed in your catalog. Leave as *0* to sort display alphabetically.
- Select whether you want the Category Image loaded on the right side or left side as shown below:

Part 2 – configure how products are to be displayed within the category

- If the Category is to include Products, the following section is used to configure how the products are displayed and what information is shown. If the Category will only display Sub-Categories, then skip this section and go to Part 3.



- Select one of the three styles defining the layout.

- Select which method to use for Category Browser.

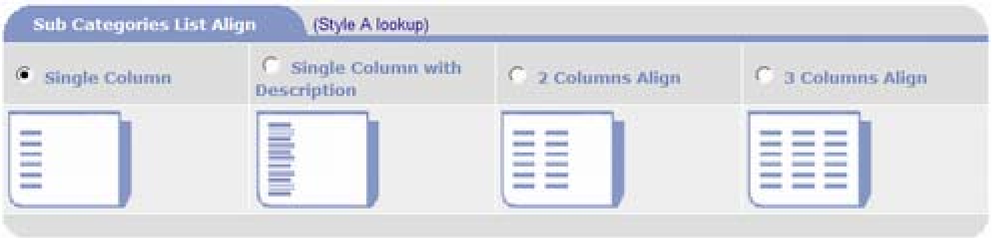
- Enter Integer values in Max Products Row and Max Rows with Products on a Page fields to define the number of products displayed on the page.

- Answer *Yes* or No to each question to show or not show it on the page.

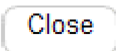
- You can display up to three Detail Categories on the Catalog page. These are values that you define using Detail Category Management. Detail Categories are displayed on the Product Detail page, but you can also include them on the Category page. Select a Detail Category from list box to include, otherwise leave as is.

Part 3 – configure how sub categories are to be displayed within the category:

- If the Category contains Sub-Categories configure how they are displayed here.



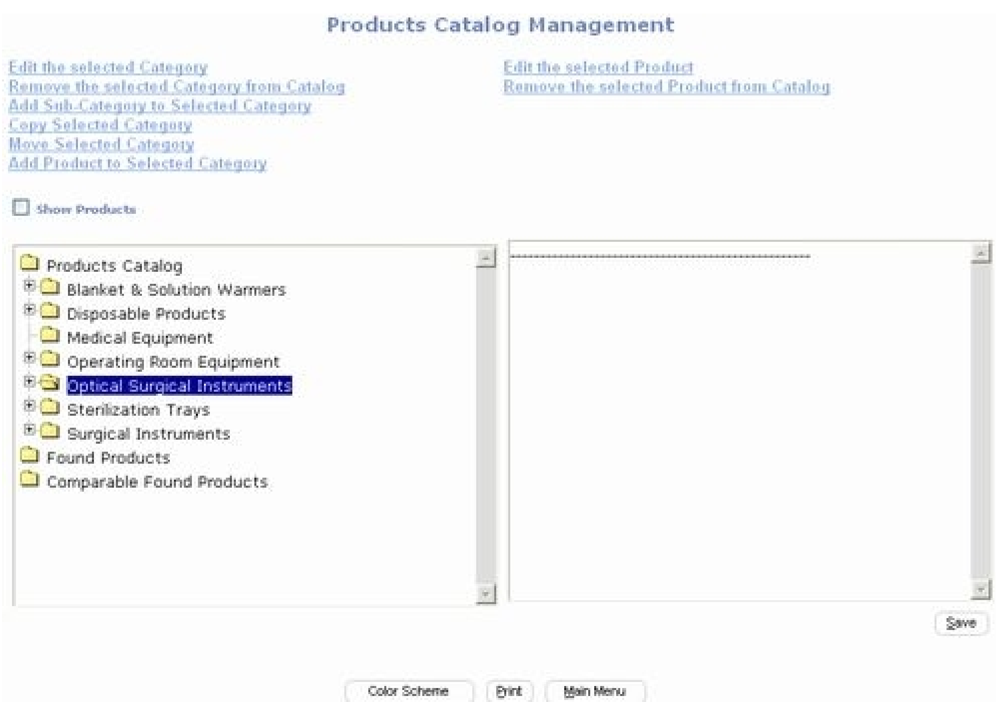
- Select from one of the four choices. The second choice includes the Short Description below the Category Name.

- Click  option button located at the bottom of the Products Category Management page and confirm save.

- The Category is now a part of your Product Catalog and ready to have products assigned to it. PORTALPRODIGY will return to the Product Catalog Management page.

1.5.14 How to Edit Shopping Catalog Categories:

- From the Site Administration Menu  option, click  to display the Product Catalog Management page.



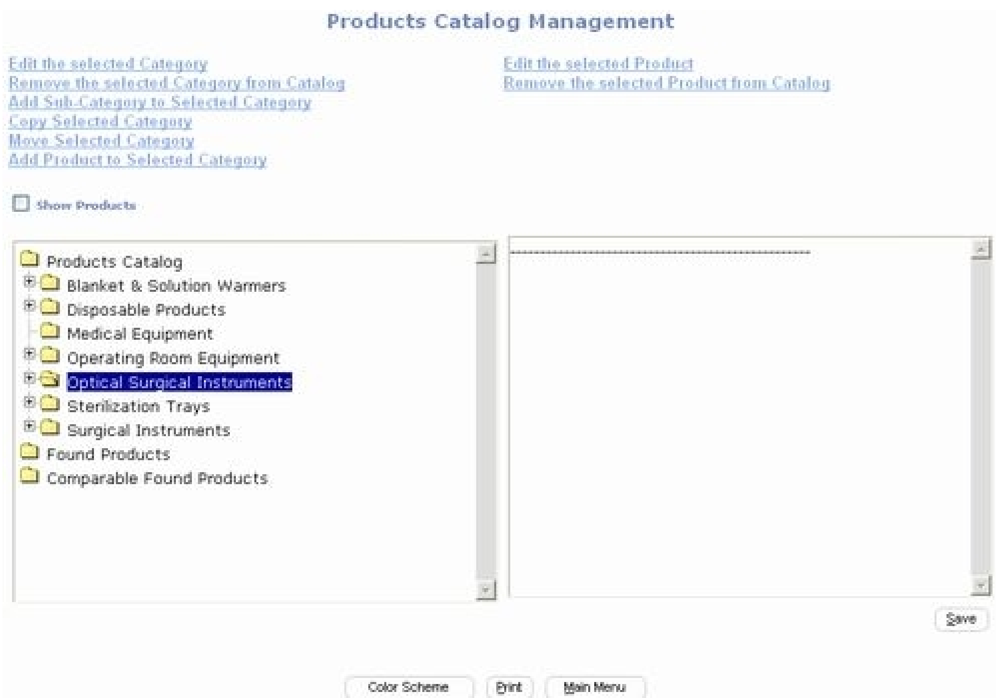
- Highlight the Category you want to edit and click Edit the Selected Category.

- Follow the same steps described in Creating New Shopping Catalog Categories.

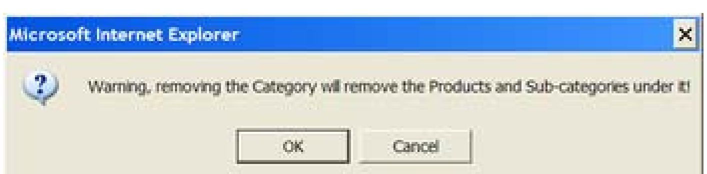
1.5.15 How to Delete Shopping Catalog Categories:

- From the Site Administration Menu  option, click  to display the Product Catalog Management page.

- From the Site Administration Menu  option, click  to display the Product Catalog Management page.



- Highlight the Category you want to delete and click [Edit Remove the Selected Category From Catalog].



- Click  to remove the Category.

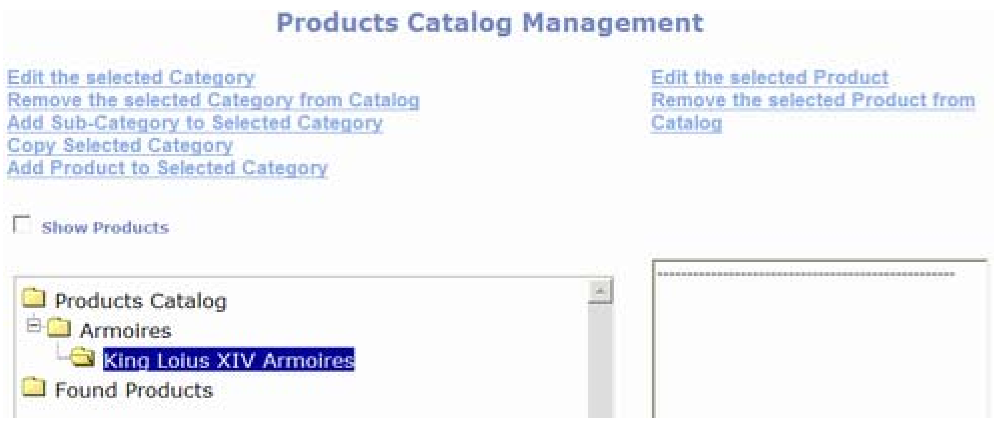
1.5.16 How to Assign Products to Shopping Catalog Categories:

This tutorial describes how to add Product Items to your Shopping Cart.

Pre-requisite: You must first define Product Categories and Product Items.

- From the Site Administration Menu 

option, click  to display the Product Catalog Management page.



- Highlight the Category you want to assign Product Items to and click Add Product to Selected Category. This will display the Product Search page.

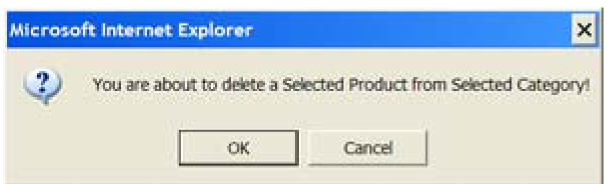
- From here there are three steps to assigning Product Items to a Category:
  - Step 1 – Use Product Search to display Products.
  - Step 2 – Select (check) Products to be assigned.
  - Step 3 – Update Category

- Use the Product Search feature to enter search criteria. See the section on Product Searches for detailed instructions how to perform search.
- Click Search to display Found Items as shown below.

- You can manually check each Item to include or you can click Select All.
- After clicking Select All you can manually uncheck Items to not include.
- You may repeat the Search and Selection process to select additional Items using different criteria. Portal Prodigy will keep track of the Items you have selected.
- When finished selecting Items, click Update Category to assign all selected Items to the Category.

- PORTALPRODIGY will return to the Product Catalog Management page. The selected Items are now posted in your Shopping Catalog
- To view the Items you have assigned to the Category, check  . The Product Items for the selected Category are displayed in the left side listing control.

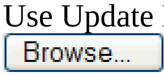
- You can individually remove Items from the Category by highlighting the Item and clicking Remove the Selected Product from Catalog.



- Click  to remove the Item.

1.5.17 How to Copy a Shopping Catalog Category:

- From the Site Administration Menu  option, click  to display the Product Catalog Management page.
- Select (highlight) the category to be copied.
- Click Copy Selected Category.
- The following options are displayed:

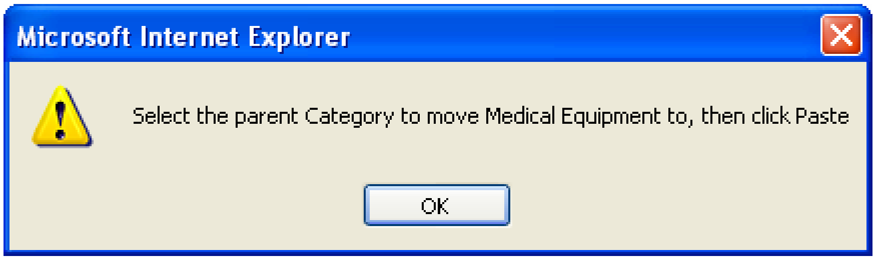
- Enter a Category Name for the copied category.
- You may change the short description.
- You may change the long description.
- Use Update Image if you want to upload a different image for the copied catgegory. Click on  to select a new image file.
- Use Sort Order to control the order of categories and sub-categories within the catalog. Leave it set to *0* to sort alphabetically.
- Use the Copy Category Options to specify how to handle the following:
    - **Copy All Sub Categories:** set to *Yes* to copy all sub-categories of the copied category. Set to *No* to just copy the selected category.
    - **Copy Products:** set to *Yes* to copy all products assigned to the copied category. If Copy All Sub Categories is set to *Yes*, it will copy products for them also. Set to *No* to leave Category empty when copied.

1.5.18 How to Move a Shopping Catalog Category:

This tutorial describes how to move a Shopping Catalog Category.

- From the Site Administration Menu  option, click  to display the Product Catalog Management page.
- Select (highlight) the category to be moved.

- Click Move Selected Category:
- Click Ok on the dialog box shown below:



- Select (highlight) the parent category to move to.
- Click the icon displayed next to the 

1.5.19 How to Setup the Request a Quote feature:

See the chapter of this guide titled **Quotes Feature in Detail**.

1.5.20 How to Setup the Place a Bid feature:

See the chapter of this guide titled **Quotes Feature in Detail**.