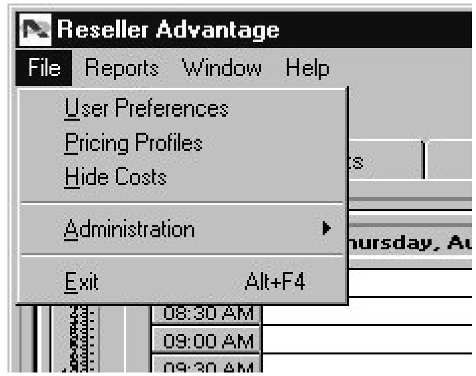
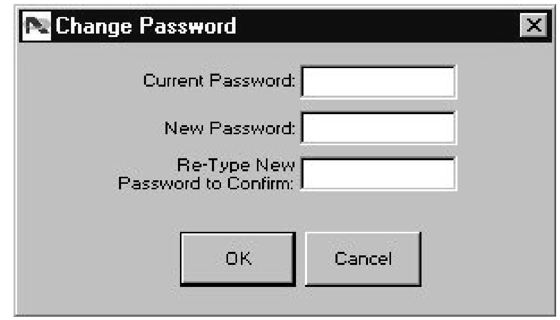
Reseller ADVantage©

System Administration

User Preferences Dialog





The User Preferences dialog is available to everyone from the File>User Preferences menu item from main processing window. It is used to setup and change information specific to each user.

User ID

User ID's are first assigned by a System Administrator. In the single user and trial versions, this ID can be changed by anyone. Just be careful to remember the new ID and password if you do. (The trial version user id and password are Guest and Guest.)

Password

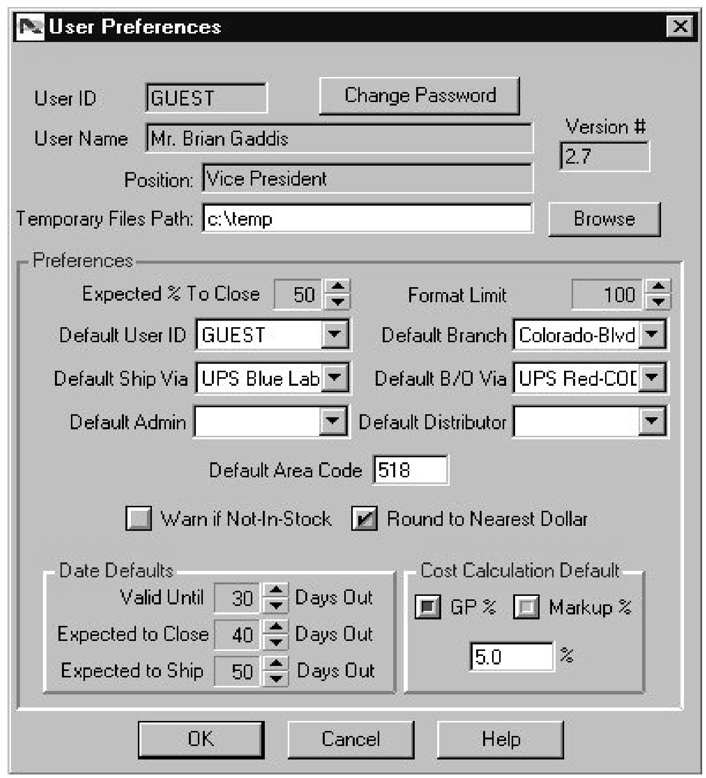
Your password can be changed by clicking the Change Password button. The Change Password dialog then opens to allow you to change it.

User Name & Position

Your name and position are retrieved from your contact record that is created by the System Administrator when they add you as a user in the system.

Version

Shows what version of Reseller Advantage you are currently running.



Temporary Files Path

This is the location where all temporary files created by Reseller Advantage will be located. The default is the C:\Temp directory.

Preferences

This area allows you to set system defaults that are specific for you. They range from who you use as your default distributor to your default cost calculation. Change any of the fields and click OK to make them permanent.

All of the Systems Administration functions in ***Reseller Advantage*** can be accessed from the main Reseller Advantage window. Only the system administration functions that you are authorized for are displayed. In the Trial Versions, user GUEST is authorized for all system administration functions.

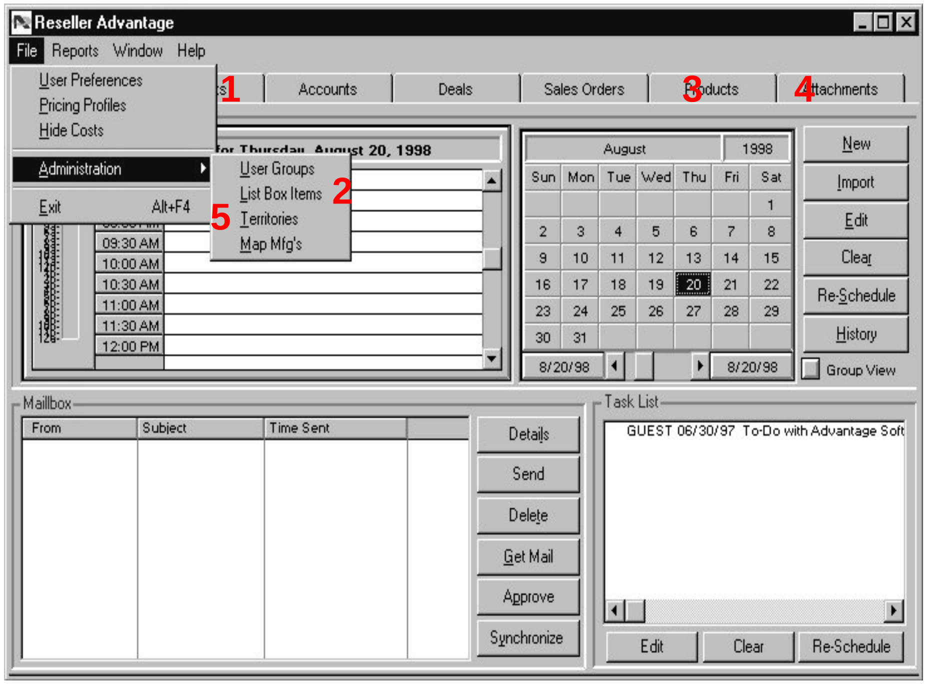
There are 5 main areas to system administration:

1. User Administration

Entering and maintaining user information including all of their security and control information is performed via the Contacts tab. Each user of the system starts as a contact within Reseller Advantage. If you have user administration rights you can create a user id, password and set user authorizations from within the Contact processing dialog's external systems tab.

2. List Box Administration

Selecting this menu item opens the List Box Maintenance Dialog in which all list box information is entered and maintained (e.g. Country Codes, Titles, Departments, etc.) You also have access to system wide setting from the System Variables table.



Administration options will only be accessible by users with the correct security settings.

3. Product Administration

From the Products tab administrators can add and maintain products and the product hierarchy. From here you can add, edit or delete individual products or you can import products from any of the 4 major distributors or from a generic import format.

4. Attachment Administration

From the Attachments tab administrators can add and maintain documentation, pictures, images, graphics, video and audio information. From here you can add, edit, delete or launch individual attachments. Attachments can also be associated to products for easy access to spec sheets, service instructions, etc.

5. Territory Administration

Selecting this menu item opens the Territory Maintenance dialog where you can set up and maintain all of your areas, territories, regions and zip codes. Accounts are added to a territory by using their default bill-to addresses zip code.

List Box Maintenance Dialog

This opens when the "List Box Items" menu item on the Administration Menu is clicked.

All of the list box information like Customer Type, Address Types, State abbreviations, etc. are maintained from this dialog.

Administrators can tailor these to better suit your company needs.

Each entry is identified with a short and a long name. Both are required, but you have the option of naming them whatever you wish, though there is one convention: the short name cannot be longer than 8 characters.

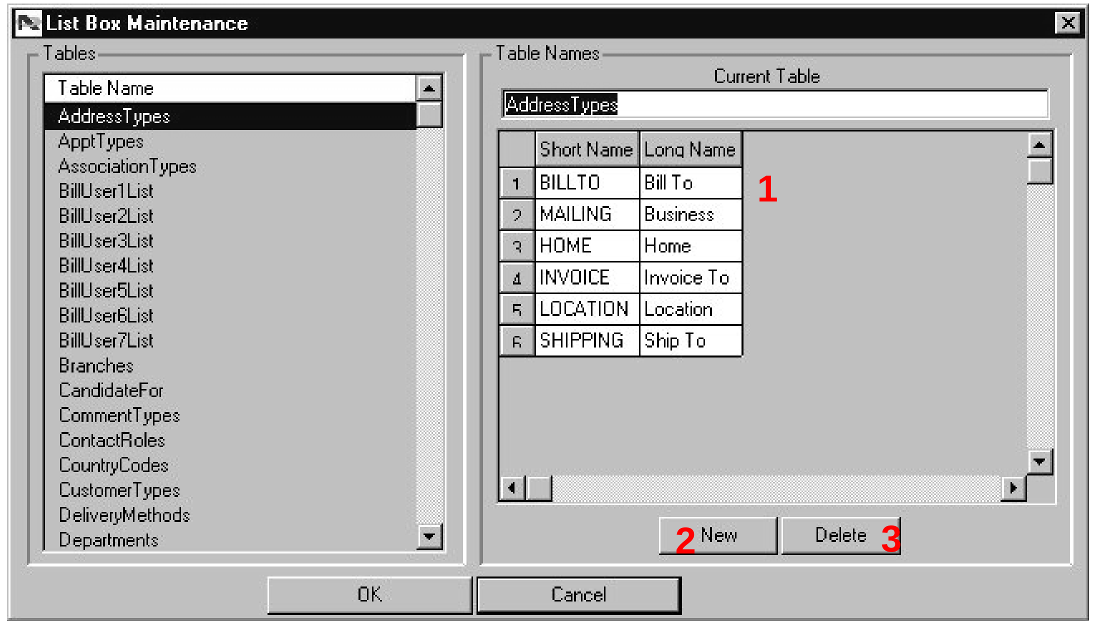
Internally we use the short name for processing, but when using the system, users will always see the long name.

1. Changing Entries

You cannot actually add a new list box table, but you have the option of changing and adding new entries. To change an entry, simply click on the long name (do not change the short name), and it will darken. Type the changed entry, and when you click anywhere outside of the entry it will be updated.

2. Adding New Entries

If you want to add a new entry (includes both short and long names) click on the New button. A set of blank boxes on the top of the list will be displayed, and all you need to do is enter both a short and a long name.



Opened when the "List Box Items" menu item on the Administration Menu is clicked.

3. Deleting Entries

If you want to delete an entry click on the row number to select the entry then click the Delete button.

To apply your updates and exit, hit the OK button. If you wish to cancel all of your changes, additions or deletes, hit the Cancel button.

With Reseller Advantage you have full control over how you wish to define your territorial assignments.

The lowest common denominator is the Zip Code, which is used to build whatever structure you need.

All of the territory information is described in hierarchical form.   For example, in this picture Country is the highest level (United States). Within country there are regions, and within regions there are areas.

Changing Territorial Names

If you want to change the name of any territory, highlight it by clicking on it (it will display in the Territory Name field), change it to what you want, and press the Rename button.

Adding Names

To add a name, first find the level that you wish to be at (e.g. Region) by clicking on an existing name at that level. Type over the existing name and hit the New button. A new name at that level will be displayed.

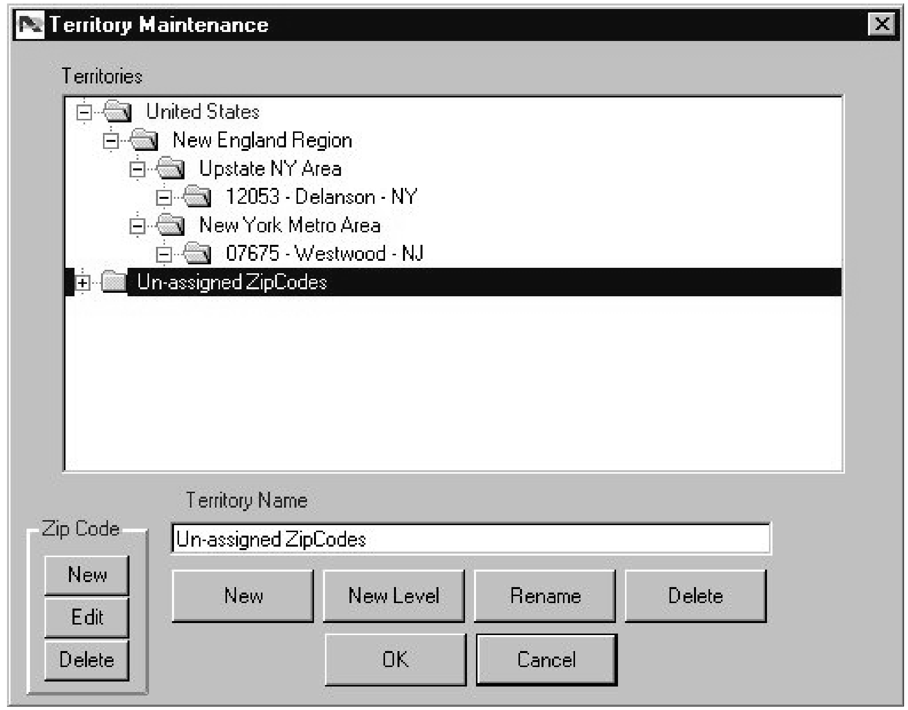
Adding Levels

You may wish to add a level (e.g. parts of a city). Position yourself at the lowest level within the area you wish to add it to, type in the name that you wish to add as the first entry in that level, and click on the New Level button. A new entry at the new level will be added.

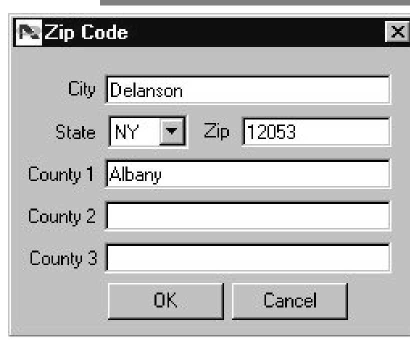
Moving Zip Code

Using Drag and Drop you can select and assign zip codes to territories. New zip codes are added to the Unassigned Zipcodes level.

When finished, push the OK button. If you do not wish to save your additions and changes, click Cancel.



Opened when the "Territories" Menu item on the Administration Menu is clicked.



Opened when the "Zip Code" new or edit button is clicked. Allows changing of City, State and County information.

The system comes pre-loaded with the vast majority of items that are sold by the average computer reseller. They are divided into types, categories and sub-categories. For example, Computers/Terminals are divided into Desktop Computers, Tower Computers, Portable Computers, etc. Within Desktop Computers there are different types, 386, 486DX/2, and so on.

If the products and services you sell fall within the pre-defined categories, you do not need to add a new type category or sub-category. If they do not fit, you will need to add a new one

Adding New Types, Categories and Sub Categories

This process works just like the territory maintenance dialog. Simply position yourself at where you want to add a new type, category or sub-category, enter it in the entry field on the bottom, and click on New. If it requires a new level, Position yourself at the lowest level within the heirarchy you wish to add it to, type in the name that you wish to add as the first entry in that level, and click on the New Level button. A new entry at the new level will be added.

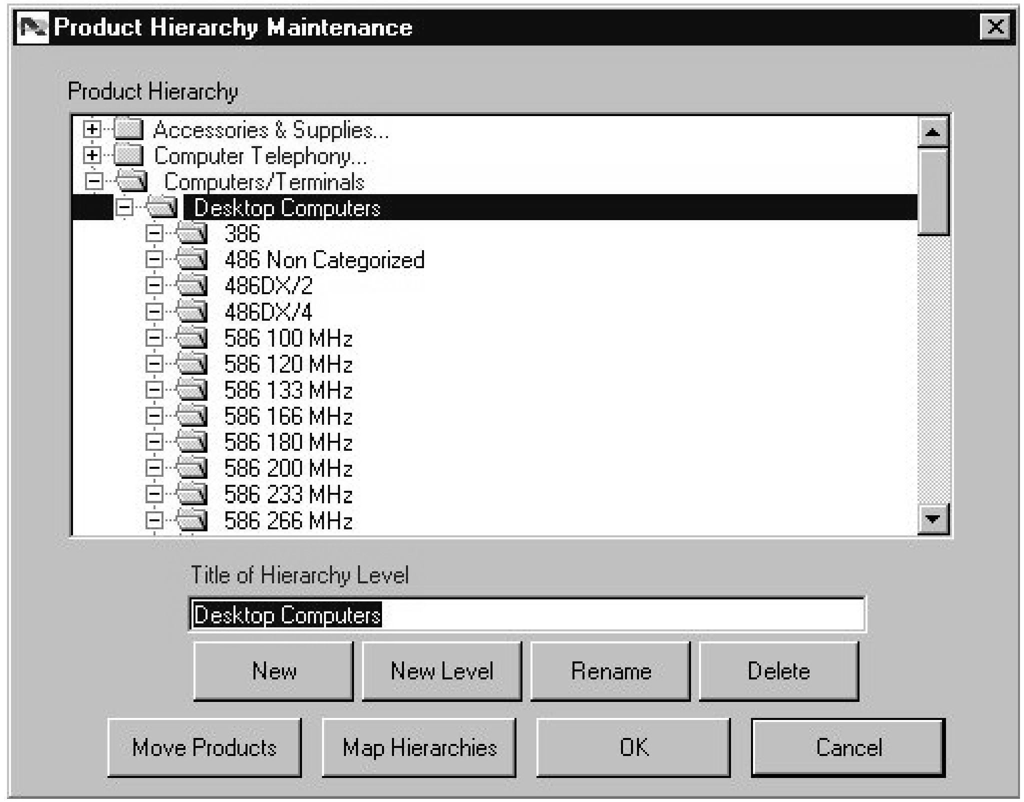
Changing Entries

Highlight the entry and it will be displayed in the title of Heirarchy Level field. Make your changes, and click on rename.

Click on OK or Cancel.

The Move Products button allows you to move products from one part of the product hierarchy to another.

The Map Hierarchies button is used to maintain the mappings between the distributors product hierarchies and reseller advantages product hierarchy.



Opened when the "Product Hierarchy Maintenance" button on the Product tab is clicked.

The Products tab allows you to Search for, Edit, Add or Delete products and services that are unique to your company, or that are from local distributors.

1. Searching for Products

To show the products within a category locate the category in the Product hierarchy. If it has a "+" sign next to it, there are sub-categories beneath. Double-click on the "+" or the name, and all sub-categories are displayed.

If you also select a manufacturer **(2)** you will only retrieve products for that manufacturer with products in the category selected.

When you have positioned yourself on the right category **(3)**, and/or selected a manufacturer click on the Search button.

All product meeting your search criteria will be displayed in the list box to the right of the product hierarchy.

4. Adding Products

To start the add product sequence, click on the New Button.

5. Changing Product Information

To change a product, highlight it in the search display area and click on the Edit button.

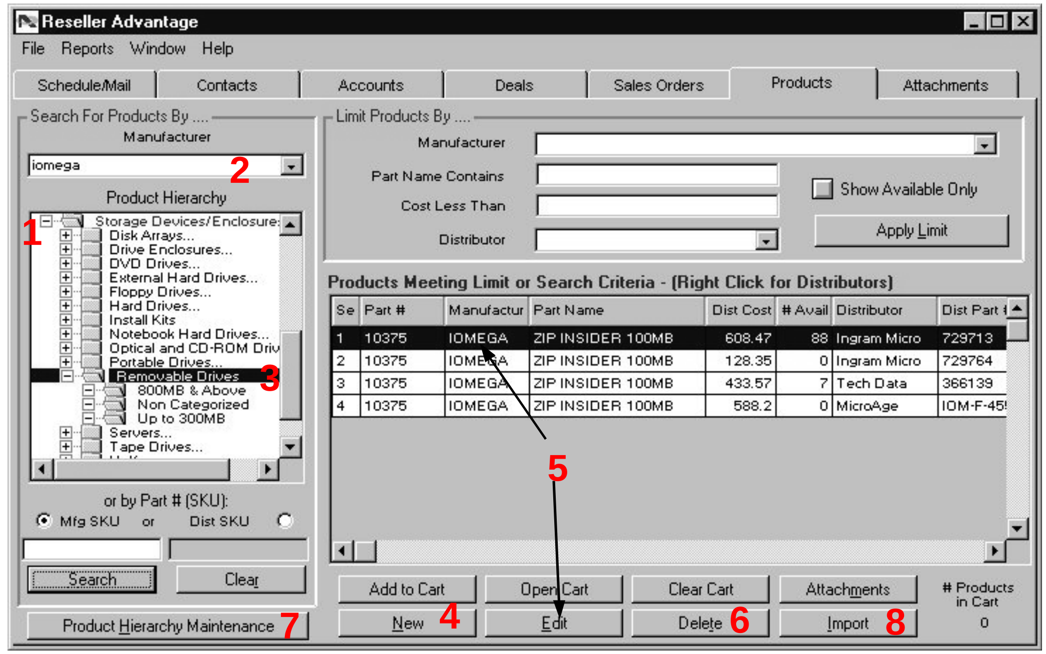
6. Deleting Products

If you want to delete a product, highlight it in the search display area and click on the delete button.

Do not delete any common items, only those that have been added by you or someone else in your company.

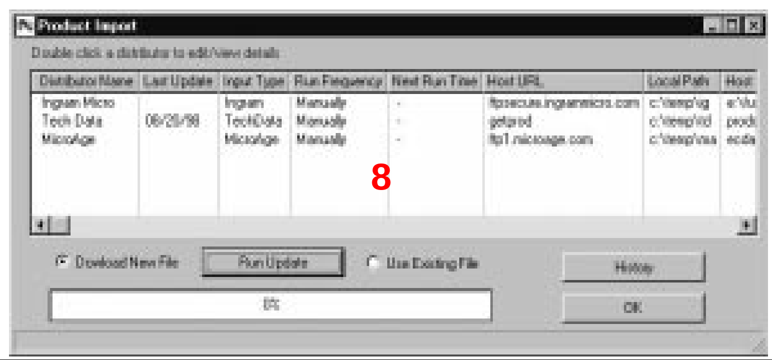
7. Product Hierarchy Maintenance

If you do not find a category to support the product or service you need click on the Product Hierarchy Maintenance button to add and maintain the product hierarchy.



8. Import Products

Click the Import button to access the Product Import dialog which allows you to import distributor products and to update their prices and availability. Scheduling the PRODLOAD.BAT batch file to run nightly automates the entire product update process.



The Product Dialog allows you to add or change product information.

The main area contains the manufacturer part #, the product type or the product name.

The 3 tabbed pages that contain:

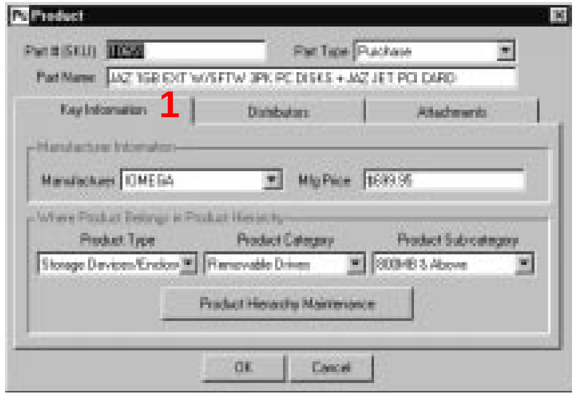
1. Key Information

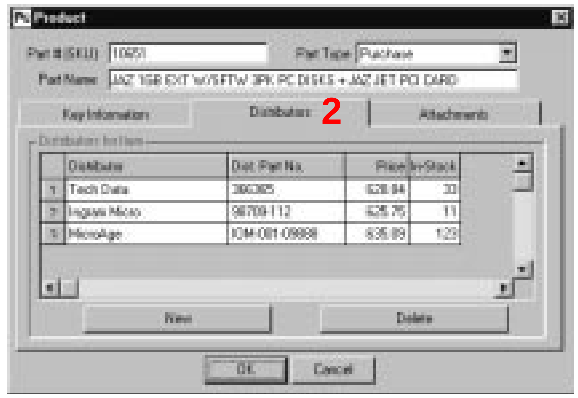
This area contains the product manufacturer, the manufacturers' list price, the product type, category, and Sub-Category. If you need a new category you can start the Product Hierarchy Maintenance process by clicking on the Product Hierarchy Maintenance button.

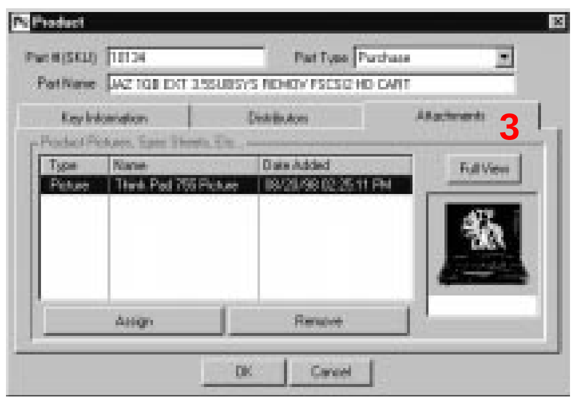
2. Distributors Data

It is likely that you purchase products from more than one distributor. This listing contains all distributors in the system that provide this product or service, their internal part number, Cost and how many they have in stock. To attach a distributor click on New button and a blank line at the bottom will be added. Select the Distributor from the drop down list (click in the Distributor input area), enter their part number, price and instock information if you know it.

The in-stock number will be decreased as each product is put on a sales order.



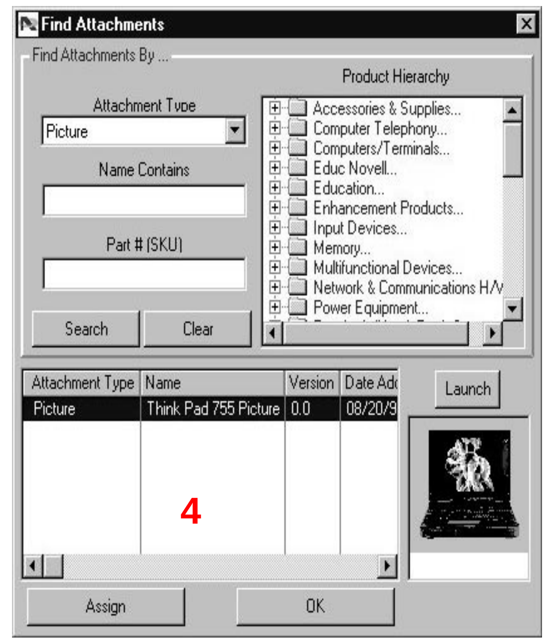




Distributor and manufacturer information is added and changed via the Account processing screen. When you add them, be sure and select whether they are a distributor or manufacturer (or both).

3. Attachments

This page is used to view, remove, and assign attachments (document, picture, etc.) to a product or service. When the Assign button is clicked, the Attachment Search dialog is opened and you can identify and select the attachments associated with this product **(4).**



Attachment Maintenance

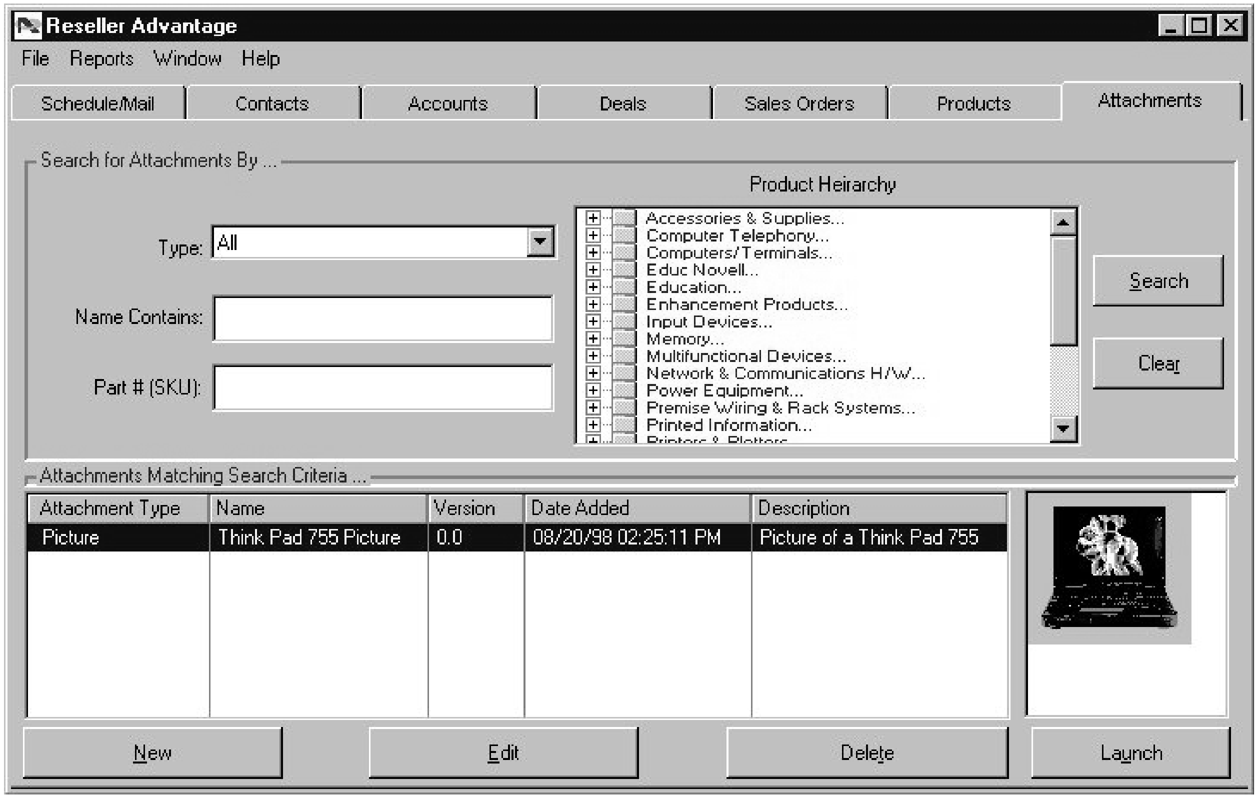
Attachments are used in ***Reseller Advantage*** primarily to provide visual backup for computer hardware and software items. Many documents and images are stored in the central database so that you can send information out with quotes and help explain the options to customers better.

Any type of information can be stored, from documents and images to multi-media PowerPoint presentations.

From the Attachments tab you can search for attachments by the product hierarchy or by type, name contains and product number.

Selecting an item fills in it's thumbnail image. Selecting Launch shows the full image or launches the program to process the attachment.

To add an attachment click on the New button. To edit an attachment, highlight it and click on the Edit button. Both use the Attachment dialog for processing. To delete an attachment highlight it and click on the Delete button

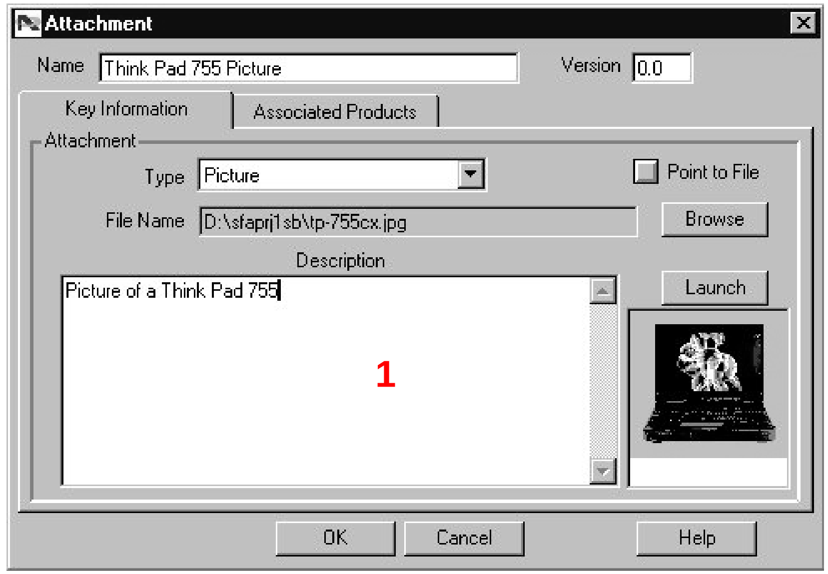


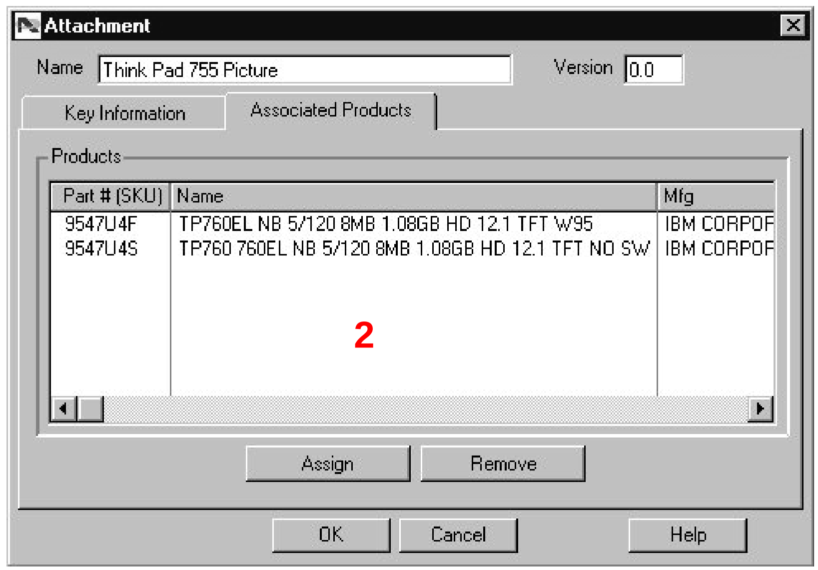
1. Key Information

- Enter the attachment name.
- Select the type of Attachment from the Type drop-down list,
- Hit the Browse button and a Find File system dialog opens up. Locate the file (document, image, etc.) and select it. That file name will be stored in the File Name field, but the file contents will actually be stored separately in the data base as a BLOB (a technical expression used to describe very large objects like documents and images). If the "*Point to File*" is selected then the file will **not** be stored in the database but will only be pointed to.
- If the item can be displayed, a thumbnail version will be displayed, and you can add whatever comments you wish.
- If you want to see the document or image in actual size, click on the Launch button, and the correct viewer will be displayed.

2. Associated Products

- From here all products associated with this attachment will be displayed. Using the Assign button you can select all products that this attachment is associated with.





Reseller ADVantage®

System Administration Feedback Page

Concerns and Suggestions

From:

Company:

Date:

Please fax to (518) 872-9137