



ManageOrders

Online Customer Portal



1655 Palm Beach Lakes Blvd.
Ste 708
West Palm Beach, FL 33401
Ph: 561-491-6000
Fx: 877-491-5860

Rev. 02
Effective: 9/30/15

Introduction

ManageOrders is a web application that allows your company to “project” sales order information to the web. Your end-users (customers and salespeople) login to the website and can use ManageOrders to:

- View order details including products on the order, payments, designs and thumbnails.
- Print out copies of the orders.
- Pay for orders and/or invoices.
- Check on order status.
- Track packages related to an order.
- See open Proofs (requires optional ProofStuff service)

Benefits

- **Cost Savings**

Having customers help themselves using your website is less expensive than hiring new CSR employees. ManageOrders enhances your current CSR efforts...it does not replace them.

- **Happier Customers**

Most of your customers LIKE helping themselves! You look better and they get better service by having a full service website where they can see what is going on and even make payments online.

- **Brand Distinction**

You are in a competitive industry. Having a full-service website where customers can get questions answered will help you distinguish yourself from the competition.

How It Works

Below is an overview of how ManageOrders.com works. For more details on setting up and using ManageOrders, view the training videos available on www.ShopWorksCentral.com.

Step 1 – Orders are Uploaded From OnSite

Every hour your OnSite server automatically uploads Orders and related information to your ManageOrders website. You can setup OnSite so that ALL Orders are released automatically or you can decide how and when Orders are released.

Some of the information included:

- Order details including line items and shipping addresses
- Order notes to the customer
- Package tracking information
- Payments
- Design thumbnails
- Order status



To use ManageOrders you must be using OnSite 8.2 or later.

Step 2 – User Access

Users of ManageOrders can be customers and/or your employees. You decide which users have access and what they can see.

The screenshot shows the 'ManageOrders.com Settings' page for a customer user. At the top, there is a navigation bar with icons for Sales, Purchasing, Receiving, Production, Shipping, Invoicing, Accounting, Inventory, Analysis, and Utilities. Below this is a sub-menu with 'Customers' selected, and further sub-menus for Profile, Accounting, Commissions, Receivables, Web & Email, and Attachments. The main content area shows the company name '3954 Josha Distributing' and website 'http://www.ivoryfurby.com'. Under 'ManageOrders.com Settings', there is a checkbox 'Give this Customer ManageOrders.com Access.' which is checked. Below it, the email 'josh@distribute.com' and password 'josh2000' are entered, with a 'Generate' button. A green checkmark indicates 'No Errors'. A red-bordered box contains the text: 'You assign an email and password for customer logins. Customers can only see their orders on the website.'

The screenshot shows the 'ManageOrders.com Access' page for an employee user. At the top, there is a navigation bar with icons for chasing, Receiving, Production, Shipping, Invoicing, Accounting, Inventory, Analysis, Utilities, Marketing, and Customers. Below this is a sub-menu with 'Employees' selected, and further sub-menus for Employee Logs, Price Calculators, Messaging, and External Data. The main content area shows the employee name 'Tony Williamson'. Under 'ManageOrders.com Access', there are radio buttons for 'No ManageOrders.com access', 'Show their orders only (as defined by Customer Service field)', 'Show all orders', and 'Allow administrative rights'. The 'Show all orders' option is selected. Below it, the email 't.williams@shopworx.com' and password 'tony' are entered, with a 'Generate' button. A green checkmark indicates 'No Errors'. A red-bordered box contains the text: 'Employees can see all orders on the site, only their orders or can be an Administrator.'

Step 3 – Users Login to See Order Information

Users login using the credentials you provide. Optionally, you can let customers login with an Order ID and their email address (they can see that order only).

You control the “look and feel” of your user’s online experience including logo, branding, and how and what data is displayed.



Your data is secure on our website and at this point is only accessible by your administrator.



ManageOrders ONLY keeps a history of the past 2 years of Orders. For Orders that are completed and older than 2 years your customer will have to call you for details.

Order #2716

Order Summary

Company Name : Robeson Industries
 Ordered By : John Hardy
 Phone : 555-1000 x140
 Fax : 555-777-6789
 Email : moeszlack@hotmail.com

Sales Person :
 Subtotal : 556.20
 Shipping : 92.03
 Sales Tax : 51.86
 Total : 700.09
 Balance : 700.09

Dates

Date Ordered : 08/12/13
 Req. Ship Date : 08/26/13
 Date Shipped :
 Date Invoiced : 08/27/13

Status

On Hold
 Des
 Ord App
 Art App
 Pur
 Sub Pur
 Rec
 Prod
 Post Prod
 Ship
 Inv
 Paid

Order Information

Qty	Part Number	Part Color	Part Description	Small	M	LG	XL	XXL	Other	Unit Price	Total Price
24	Tee	White	100s Cotton Tee				0	24		6.95	166.80
4	5180_2X	White	6.1 Oz. Beefy-T&B					4		8.50	34.00
1	tee	tri-color	Short Sleeve T-Shirt	1						5.20	5.20
3	art		Art Design Fees, per hour						3	55.00	165.00
4	screen		Screen Charges						4	45.00	180.00
	5180		Adult Tee							23.00	
1	tee	tri-color	Short Sleeve T-Shirt	1						5.20	5.20



NOTE: This is just an overview of ManageOrders and how it works. For a more detailed look please contact ShopWorks for a personalized demo or view the training videos available on www.shopworkscentral.com.

Pricing and Billing

ManageOrders pricing is based on the number of OnSite users that you have.



NOTE: This does NOT limit the number of customers or employees who can use your ManageOrders website.



NOTE: The bundled price below is for customers who use ProofStuff and ManageOrders.

OnSite User Count	Regular		ProofStuff	
		Price		Bundle Price
1-5 Users	\$	99.00	\$	89.00
6-15 Users	\$	199.00	\$	179.00
16-25 Users	\$	299.00	\$	269.00
25-50 Users	\$	399.00	\$	359.00

All prices are per month

- ManageOrders is charged as a monthly web-based service and there are no setup charges.
- We must have your credit card on file for monthly charges. To begin your service, please fill out the credit card authorization form at the end of this document and fax to 877-491-5860.
- Charges are made on the 15th of each month for the next month's service.
- Your ManageOrders service can be terminated at any time by sending an email to accounting@shopworx.com.



shopworks
business software

credit card authorization



ManageOrders

Company Name

Date

Monthly Recurring Charges - ManageOrders.com

Signing this form authorizes ShopWorks to charge credit card based on website usage as shown below. Charges will be made on or about the 15th of each month for service for the following month. Customer can cancel service at any time provided ShopWorks receives verbal or email notification by the 15th of a month. Email should be sent to accounting@shopworx.com.


Charge Amount	OnSite User Count	Monthly Price		ProofStuff Bundle Price	
	1-5 Users	\$	99.00	\$	89.00
	6-15 Users	\$	199.00	\$	179.00
	16-25 Users	\$	299.00	\$	269.00
	25-50 Users	\$	399.00	\$	359.00

START DATE

Authorization Information

MasterCard  Corporate

Visa  Personal

Amex 

We MUST have your complete address below and this MUST match the billing address for the Credit Card being used.

Card Number

- - -

Expiration Date

V-Code

V-code is the 3 or 4 digit security code listed on the back of your card.

CARDHOLDERS NAME (PLEASE PRINT)

CARDHOLDERS BILLING ADDRESS

CITY

STATE

ZIP

CARDHOLDERS SIGNATURE

fax completed form to 877-491-5860 or
email completed form to accounting@shopworx.com