The Uniform Solution
Session III – How to Setup and Personalize Your WebStore
2:00 pm to 3:00 pm

Workshop Outline
- WebStore Overview
  - Purpose
  - Key Features
  - How Does it Work?
- Features
  - Customer Features
  - Employee Features
- WebStore Walk-Through
- WebStore Setup
  - WebStore Configurations
  - Content Pages
  - Vendors, Departments, Items
- Deploying Your WebStore

WebStore Purpose
- Extend Your Retail Operation to the Internet
  - Serve your local (or existing) customers better
  - Keep their on-line business with your business
  - Allow your customers to make purchases anytime from anywhere
  - Provide eCommerce features your larger accounts need and prefer
  - Meet the needs of younger customers that prefer using the internet over the phone
- Extend The Uniform Solution to the Internet
  - Owner/Manager/Employee Features
Key Features

- Easy to Set Up
  - Set up and configuration is done in The Uniform Solution
  - A customizable WebStore is created for you as a starting point
  - Existing vendors, departments, and contracts are used to easily find and locate items you sell in the WebStore

- Easy to Maintain
  - Item Prices and Descriptions are the same in the WebStore and the retail store
  - Images are automatically downloaded for new products from “Connected Vendors”

- Customizable
  - Menus
  - Content Pages
  - Header Graphic

Seamless integration with The Uniform Solution keeps the information identical in the WebStore and The Uniform Solution

Customer Features

- Shop on-line
  - Automatically see pricing based on discounts and contracts
  - Check in-store stock availability, and vendor stock availability
  - WebStore accounts can be linked to existing accounts
  - View purchases, orders, and payment history – reprint if needed
  - Update Account Details (addresses, contact information, telephone)
  - 3rd Party Billing
  - Request 3rd Party Billing from a Store Account
  - Store Accounts are notified by email and can Approve or Deny a request

- Group Sign-In
  - View the products and pricing for the Group
  - Show a logo of the Group while viewing items

Employee Features

- Sign-in with Employee Privileges
  - Run and Save The Uniform Solution Reports that are Web-Enabled
  - View Sales Entry Transactions (invoices, orders, layaways, gift cert, quotes)
  - Reprint Sales Entry Transactions
  - Item Lookup

How Does it Work?

- The Uniform Solution Web Server
  - Installed on the computer that is your Server
  - Runs each time the computer starts (as a Service)
  - Uses a WebStore Configuration defined in The Uniform Solution to create the WebStore
  - Receives Requests to display a web page from a Browser (like Internet Explorer)
  - Creates Web Pages that are displayed in the WebStore Users Browser
**WebStore Walk-Through**
Shopping, Sign-in Options, Shopping Cart, Adding Embroidery, Payment Options

**Creating Your WebStore**
Design, Customizable Options, and Preferences

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**WebStore Setup Concepts**

- **The WebStore Configuration Form**
  - Contains all preferences, settings, and design options for a WebStore
  - Is used to select Vendors to include in the WebStore

- **Content Pages**
  - User definable Web Pages made up of text or objects (i.e. items, graphics, brands)
  - Referenced by a WebStore Configuration

- **Pre-Defined Content**
  - Called by menu items and objects on a Content Page (i.e. Shop by Brand/Department, Sign-In, Customer Menu, Employee Menu, Run a Report, etc.)

- **Items Included in the WebStore**
  - All items for a Vendor are included when the Vendor is set to include All items in the WebStore Configuration Form
  - Items with **Include in WebStore** checked (if only selected items are included for a vendor)

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**WebStore Design and Options**

**Pre-Designed Framework**
- Header Area, Menu Bar, Left Menu, Footer

**Customizable Options**
- Header Graphic, Title & Sub-Title, Menu, Content Page
Creating Your WebStore

- WebStore Configurations (Setup > WebStore)
  - Contain preferences and selection options that control the display and operation of a WebStore
  - Select Preferences (cart, stock, emails, customers, header graphic, titles, etc.)
  - Choose Brands and Departments to Include
  - Customize the Menu and Menu items
  - Content Pages are assigned to Menu items and the Home, Contact Us, and Privacy Page options
  - Use store settings for pricing, store stock, etc.

Content Pages

- User Defined Web Pages Referenced by a WebStore Configuration
- Display Content (text and graphics) in the WebStore
  - *.htm or *.html files
  - Used by Menu Items in a WebStore Configuration (or Home Page, Privacy Page)
  - User Defined
  - Pages are built from rows of Text or Objects (1–4)
WebStore Options
 Contracts, Customers, & Users

Contracts

Customers

Users

WebStore Options
 Inventory Items, Vendors, Departments

Styles

Products

Colors, Departments, Vendors

Personalized Content

- User defined header images
- User defined header and sidebar menu options
- User defined image placement with link capability
- Seasonal images provided and updated via URL by vendors
- .htm and .html content pages

Personalize Your WebStore
User Defined Header Images

- Display your own corporate brand logo
- Image can be added to your WebStore in seconds through the Graphics tab in the WebStore configuration
- Obtain the image from a vendor approved source such as a website, CD-Rom or other electronic file
- Save the image to a folder on your computer. You may want to give it a name that is easy to recall
- From the Item list simply select the item and click on Select Image
- Select the F2-New Image button and use windows explorer to find the image you saved in the previous step

User Defined Menus

- Create custom header menu options which can link to pre-defined content pages or user defined content pages
- Control visibility by requiring sign-in.
- Custom images such as banners and buttons can be added with ease giving you the flexibility to add social networking links and more

User Images

Selling a style or product from a vendor that does not provide images is no problem. A style or product image can be added in a flash

- Obtain the image from a vendor approved source such as a website, CD-Rom or other electronic file
- Save the image to a folder on your computer. You may want to give it a name that is easy to recall
- From the Item list simply select the item and click on Select Image
- Select the F2-New Image button and use windows explorer to find the image you saved in the previous step

User Images

- Save the Image to your computer
- Go to Setup > WebStore
- Click on the content page button
- Select the desired content page or start a new page
- Select the desired content section or start a new section
- Show: Object
- Select desired number of columns and click on setup
- Type: Graphic
- Link: URL (ie.Web Address)
- Enter URL (Note: If the desired URL is too long to fit in the URL field you can go to www.tinyurl.com, enter your URL on that site and the site will provide you with a shortened URL. Use Ctrl+C to copy from www.tinyurl.com and CTRL+V to paste the shortened URL into the field)
- Use the “Open a new tab in the browser” button if you do not want your customers to be directed off of your website
URL Graphic Images
› This is a great way to add vendor images that are seasonally maintained to a Content Page
  • Go to Setup > WebStore
  • Click the Content Page button
  • Select the desired Content Page or start a new page
  • Select the desired Content Section or start a new section
  • Show: Object
  • Select desired number of columns and click on setup
  • Type: Graphic from a URL
  • Click on the Select URL button and select a graphic from the list provided. You can hit the View Graphic button to see a preview of the image
  • Many of the images have ‘Shop Now’ embedded. It may be a good idea to create a department and link the image to a department

.Htm and .Html Pages
Create your own content page using your own text fonts, colors, graphics and more
› Create an .htm or .html page file and save it to the root of C:\usw\web. Any images associated with that page will need to be saved in the same location
  • Go to Setup > WebStore
  • Click on the content page button
  • Start a new Content Page
  • Name your page
  • Type: .htm or .html File
  • Enter your file name in the HTML File field.
  • OK to save
  • Go into your WebStore configuration and assign the Content Page to a menu option

WebStore Deployment
› See Deploying the WebStore in the On-line Help
  • Get Your WebStore working on your LAN (Local Area Network)
  • Make sure you have Business Level Broadband that allows port 80 and 443 traffic
  • Forward Port 80 and 443 on your Router to Your Server
  • Get a Fixed IP Address
  • Get a Domain Name for the IP Address
    • www.uniformusaicharleston.com
    • www.landsuniformsNashville.com
  • Get an SSL Certificate if plan you to sell on-line
  • Stores with Multiple Locations
    • Determine if you need multiple WebStores
    • Create a WebStore Configuration for each store with a WebStore
  • Get Set up for X-Web
    • To process credit cards you will need an eCommerce Terminal ID or a separate Merchant Account

Conclusion and Review
› The Uniform Solution WebStore
  • Easy to set up and maintain
  • Offers seamless integration and all the essential features you need in a solution that is dependable and affordable
  • Major vendors keep their products, pricing, and images up-to-date
  • Basic functionality is provided with your Software Subscription
  • Shopping Cart functionality is $100/month and includes 2 hours of technical support
› In 2012, a WebStore is a critical extension of your retail business
Questions

Accessing the WebStore
- Accessing the WebStore
  - Option 1: Select The WebStore button on the Application Tool Bar to load the WebStore in your default Browser
  - Option 2: Enter the address 127.0.0.1 in you Browser

Task 1
- Start the WebStore
- Select **Shop By Brand > Cherokee**
- Find **2074** and select it by (1) clicking the image or (2) selecting the link **2074 by Cherokee**
- Set the Color to **CHOB** and the size to **2XL** (in the drop lists)
- What is the Price of the Item? ____________
- What is the stock level of the Item? ____________
- What happens when you change the drop list that has the color options? _________________________________________
- What happens when you click a color in the color chart? ____________________________________________________
- What happens when you select the [+] Larger image? ________________________________________________________

Workshop Exercises

Looking for Items
Looking For Items

- **Task 2**
  - Start the WebStore
  - Select **Shop by Department > Labcoats**
  - In the Shop Listing, change the Brand to **Peaches**
  - How many **Peaches Labcoats** are listed? _______
  - How many **Barco Labcoats** are listed after selecting to show Labcoats for Barco? _______

### Exploring Customer Features

- **Task 1 – My Account Menu**
  - Start the WebStore
  - Select **Sign-in**
    - Email: armando@gmail.com
    - Password: 1234
  - Select **My Account > Sales History**
    - How many Sales invoices are there (sold to the customer)? _______
    - How many Sales invoices are there (sold to Baylor)? _______
    - What **Time** was invoice No. 105 created on 10/23/10? _______
      - Hint: You’ll have to Print it.
  - Select **My Account > Open Orders**
    - How many open orders for the Customer sold to Baylor? _______
  - Select **My Account > My Account Settings**
    - Select **Edit My Billing Information**. Check out the options and make a change to an address field. See if the changes are reflected in The Uniform Solution.

- **Task 2 – Link to an Existing Account**
  - Select **Sign-out** if you are signed in or Select **Sign-in**
  - Select **Link to My Existing Account**
    - **Step 1 – Locate Your Account**
      - Phone Number: 972-578-5068
      - Zip: 75083
      - Account #: 5
    - Select **Lookup**
    - **Step 2 – Enter Your Email Address and Password**
      - Email Address: beth@gmail.com
      - Password: 1234
    - What does the “Welcome” message say? ____________________________________________

### Exploring Employee Features

- **Task 1**
  - Select **Sign-in** (or **Sign-out** if still signed in)
    - Email: clerk@gmail.com
    - Password: 1234
  - Select **Employee Menu > Sales by Date**
    - Select the **Calendar** button to set the Date to 10/23/2010
    - What is the **color** of the heading in the Calendar popup? __________
    - Select **Total Sales**
      - What is the total sales for the day? __________
      - Select the **Return** button to go back to **Sales by Date**
Exploring Employee Features

- Task 2
  - Select Run a Report form the Employee Menu
  - Select Cash Flow Summary > Run Report (link)
  - Select Run Report Button (using the defaults on the Form)
  - What is the “Status” of the report you just ran? ________________
  - Select the Refresh button
  - What is the “Status” of the report now? ________________
  - Select the ‘View’ link in the table for the report
  - What is the Gross Sales for the Report? ________________
  - Go back to the My Reports Table
  - Select to Save the report
  - Change the Show drop list to “Saved”
  - How many saved reports are in the list? ________________

Modifying a WebStore Configuration

- Task 1 – Change the Header Graphic
  - Select Setup > WebStore
  - Select the WebStore button and Edit Configuration
  - Select the Graphics option in the left menu Design and Selections
  - Select the Down Arrow on the Drop List with the mouse, then use the keyboard’s arrow up and down keys to select a new header graphic for the WebStore (Light Blue with Flower will look good with subsequent changes)
  - Continue to Task 2

- Task 2 – Add White Swan to the WebStore
  - Select the Vendors option in the left menu Design and Selections
  - Select White Swan in the Available Vendors and select Add
  - In the Include column for White Swan, click the “All” value to make it change to “Selected” for White Swan
  - Select the Save option in the left menu Configuration
  - Select Refresh WebStore button on the WebStore Configuration List
  - Select the WebStore button to verify your modifications

Modifying a Content Page

- Task 1 – Modify the Heading of the Home Page
  - Select the Content Pages button from the WebStore Configuration List
  - Right-click the Home Page in the list and select Edit Content Page
  - Modify the Heading 1 Text to: Welcome to %Store:Name%'s WebStore
  - Continue to Task 2

- Task 2 – Add a New Heading to the Home Page
  - Select the Section button and select New Content Section
  - Set the following values
    - Show: Text; Alignment: Left; Type: Heading 3; Text: How to Sign-in
  - Select OK to save the New Section
  - Continue to Task 3

- Task 3 – Modify the Home Page Graphic
  - Modify the last item on the Content Page - Object(s) 1 Column
  - Select the Setup button for Column 1
  - On the Object Setup Form - make the following changes
    - Type: Graphic from URL
      - Link: Brand
      - Click the Select Brand button and choose Barco
      - Click the Select URL button
      - Highlight the Home Page Graphic provided by Barco
      - Notice the column named Changes. How often is the graphic updated? ________________
      - Click the Select button to save the selection
    - Click OK on the Object Setup Form
    - Click OK on the Changing Content Section Form
    - Click OK on the Changing Content Page Form
    - Click the Refresh WebStore button on the WebStore Configuration List
    - Select the WebStore button to see your changes in the WebStore’s Home Page