Exact Synergy Enterprise

User Guide
B2B E-Commerce Portal

257

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CONTENTS

1. INTRODUCTION 1
2. SYSTEM REQUIREMENTS 3
3. INSTALLATION AND CONFIGURATION 4
3.1 Installation 5
3.2 Updating Procedures 7
3.3 Configuration 7
4. SETTING UP B2B E-COMMERCE PORTALS 17
4.1 Back-office Connection 18
4.2 Setting Up B2B E-Commerce Portals 18
4.3 Pages and Widgets 40
4.4 Practical Guide to Pages and Widgets Usage in B2B E-Commerce Portals 151
5. PROCESSES FOR VISITORS 155
5.1 The Order Process 156
5.2 The Request Information Process 157
5.3 The Create Prospect Process 158
6. ANONYMOUS ORDERING 159
7. CREATING AND MODIFYING LOGINS IN EXACT SYNERGY ENTERPRISE 160
8. LINKING DEBTOR CODES TO ACCOUNTS IN EXACT SYNERGY ENTERPRISE .. 163
9. MERGING CODES 164
10. CSS CUSTOMIZATION GUIDELINES 167
10.1 CSS Files for B2B E-Commerce Portal Themes 167
10.2 B2B E-Commerce Portal Page Structure 168
10.3 Using CSS Classes for Customizations 170
10.4 Internet Explorer Web Developer Tools 173
11. SEARCH ENGINE OPTIMIZATION (SEO) 174
11.1 What is SEO? 174
11.2 SEO in B2B E-Commerce Portals 175
12. ADD-ONS 176
APPENDIX 1: PRODUCT UPDATE CHANGES 177

1. INTRODUCTION

This document describes the installation, configuration, and workings of the B2B E-Commerce Portal (ECP). This solution has been developed to support companies to better work together with their customers and resellers, since it increases speed and efficiency in the supply chain. In order to make use of the B2B E-Commerce Portal solution, it is necessary to have Exact Globe Next and Exact Synergy Enterprise installed.

In short, the B2B E-Commerce Portal offers an extensive Business-to-Business (B2B) Webshop that enables your customers, resellers, and employees to easily find products and order them, with real-time stock and price information. The B2B E-Commerce Portal is fully integrated with Exact Synergy Enterprise (for portal access, documents, and requests) and Exact Globe Next, where all the item-, price-, stock-, sales order-, and invoice-related data are stored.

From a high level perspective, the following features and functionalities are available:

- Easy and fast implementation
- Customizable look and feel with the possibility to set a preferred style and position data by using pages and widgets
- Multiple languages and the possibility to create own translations (by use of terms)
- Multiple portals (one Exact Globe Next administration can have multiple portals with different look and feel)
- Active Directory or Forms authentication
- Different styling, positioning, and display of data for anonymous and authenticated visitors or users
- Enter orders as a customer
- Enter orders as a reseller
- Enter orders as an employee
- Fully-integrated maintenance in Exact Synergy Enterprise
- Multi-browser support
- Search engine friendly
- Item catalog
- Advanced item search
- Item detail information
- Multiple images per item (Item image gallery)
- Real-time stock information
- Exact Globe Next assortment support
- Item categories
- Item selections per customer (group)
- Price list and price agreement support
- Multiple currency support
- Save shopping carts
- Quick entry with item codes
- Import shopping carts from Microsoft Excel worksheet (link with your customers' ERP systems)
- Authorize shopping carts by your customers' purchase managers
- (Back) order and invoice overviews
- Favorites
- Support for E-Variant
- "Anonymous ordering"
- Support for Electronic Payment via Ogone
- Request new login
- Forgot password
- Display of Exact Synergy Enterprise documents
- Enter Exact Synergy Enterprise requests
- Four standard themes (style sheets with different look and feel)

In order to run the B2B E-Commerce Portal solution, the following products and modules are needed:

Exact Globe Next:

- E-Order (SE1200)

Exact Synergy Enterprise:

- B2B E-Commerce Portal (YA1812)

2. SYSTEM REQUIREMENTS

The B2B E-Commerce Portal is based on Exact Synergy Enterprise and Exact Globe Next, and basically has the same system requirements. For more information, see *Hardware and software requirements for Exact Synergy Enterprise (Doc ID: 17.389.758)* and *Hardware and software requirements for Exact Globe Next (Doc ID: 16.320.346)* in the Exact Synergy Enterprise website.

On top of these requirements, the following applies:

- For the B2B E-Commerce Portal maintenance, Internet Explorer 9 or higher is needed.
- The B2B E-Commerce Portal supports Internet Explorer and Firefox, and while it works with other browsers, the look and feel might differ.
- Microsoft .NET framework 4.5 is required for the B2B E-Commerce Portal.

3. INSTALLATION AND CONFIGURATION

This chapter describes the necessary procedures to get your B2B E-Commerce Portal up and running, starting with the installation of the B2B E-Commerce Portal to setting up the portal.

3.1 INSTALLATION

The installation of the B2B E-Commerce Portal consists of two parts:

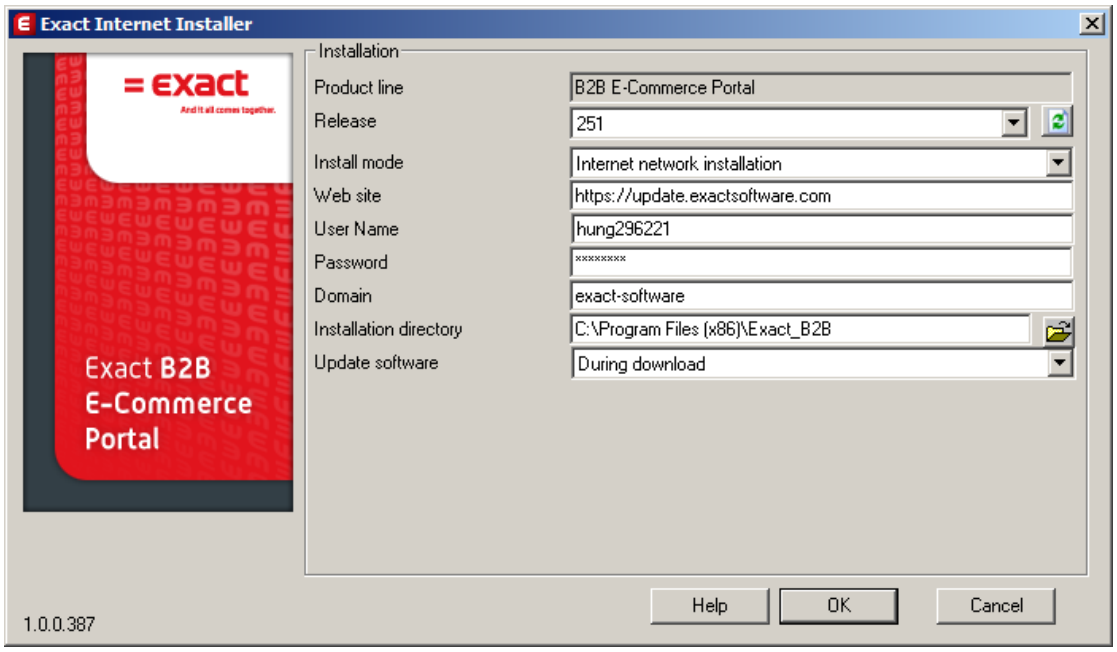
1. Installation of all targets needed for Exact Synergy Enterprise.
2. Installation of all targets needed for the B2B E-Commerce Portal that is installed on the Internet Information Services (IIS) server.

Installation of all targets needed for Exact Synergy Enterprise

All targets needed for modifying pages, widgets, master data, and settings for the B2B E-Commerce Portal are installed in your Exact Synergy Enterprise environment automatically during the installation or updating of the Exact Synergy Enterprise environment.

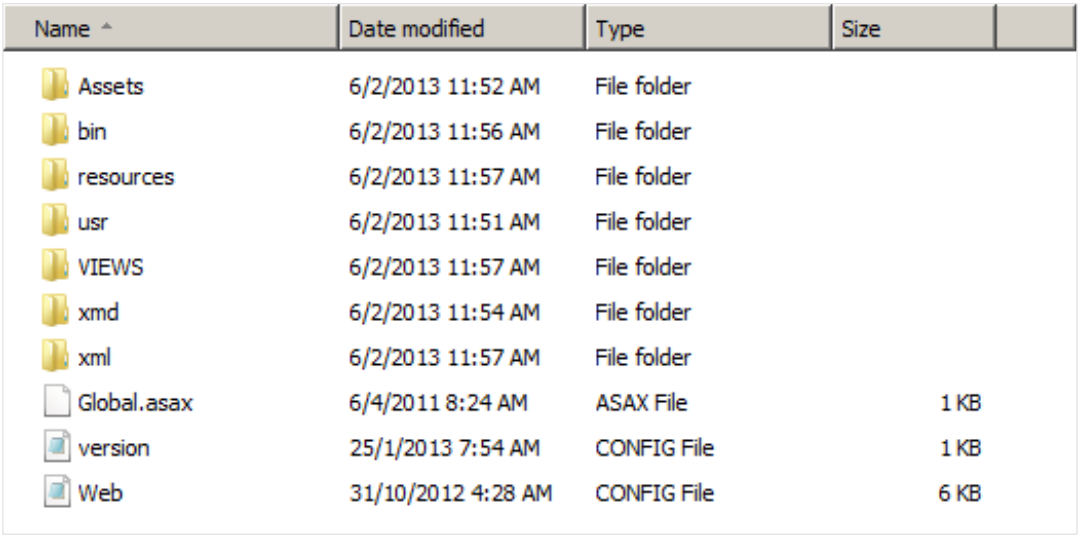
Installation of all targets needed for the B2B E-Commerce Portal that is installed on the Internet Information Services (IIS) server

The **B2B E-Commerce Portal** should be installed on the IIS server in a different folder other than that of Exact Synergy Enterprise. A separate installation will install all the needed files. All the needed files can be installed using the Exact Synergy Enterprise Product Updater application (ProductUpdater_T17_AE.exe or ProductUpdater_T17_NL.exe), which you can find in the **bin** folder where your Exact Synergy Enterprise is installed.



After installation, the specific files for the B2B E-Commerce Portal will be available in the installation directory on the IIS server that you have defined.

After the B2B E-Commerce Portal has been installed on your computer, the directory structure should look like the following:



Name	Date modified	Type	Size
Assets	6/2/2013 11:52 AM	File folder	
bin	6/2/2013 11:56 AM	File folder	
resources	6/2/2013 11:57 AM	File folder	
usr	6/2/2013 11:51 AM	File folder	
VIEWS	6/2/2013 11:57 AM	File folder	
xmd	6/2/2013 11:54 AM	File folder	
xml	6/2/2013 11:57 AM	File folder	
Global.asax	6/4/2011 8:24 AM	ASAX File	1 KB
version	25/1/2013 7:54 AM	CONFIG File	1 KB
Web	31/10/2012 4:28 AM	CONFIG File	6 KB

3.2 UPDATING PROCEDURES

When you are updating Exact Synergy Enterprise, make sure that you update the B2B E-Commerce Portal as well, and vice versa.

After an update of the portal, the ASSETS\DEFAULT\THEMES folder should be copied to your portal directory manually.

3.3 CONFIGURATION

This section describes the B2B E-Commerce Portal configuration in general. Depending on your preferences, some details such as the names of directories may vary.

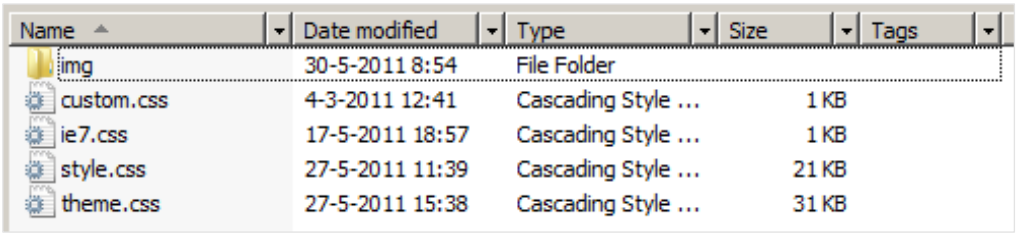
3.3.1 SQL login

On the SQL Server, a specific login has to be created for the B2B E-Commerce Portal access. The login should have the **Owner server role** for the Exact Synergy Enterprise database. A password should be defined for this login.

3.3.2 Style sheets

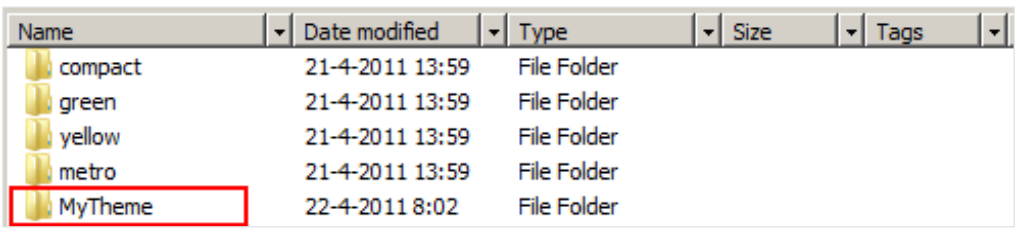
The **Portals** directory, which can be found on the IIS server or in the installation folder where the B2B E-Commerce Portal is installed, contains one sub-directory or more (for more information, see *Chapter 4 Setting Up B2B E-Commerce Portals*). This sub-directory will be created automatically each time you create a portal within the ECP maintenance in Exact Synergy Enterprise via Modules → Documents → Setup → Maintenance → ECP Maintenance. Each sub-directory contains a sub-directory called **themes**. The B2B E-Commerce Portal has four standard themes, which are **compact**, **green**, **metro**, and **yellow**. Each theme is stored individually in the **themes** sub-directory.

Each theme contains the following contents:



Name	Date modified	Type	Size	Tags
img	30-5-2011 8:54	File Folder		
custom.css	4-3-2011 12:41	Cascading Style ...	1 KB	
ie7.css	17-5-2011 18:57	Cascading Style ...	1 KB	
style.css	27-5-2011 11:39	Cascading Style ...	21 KB	
theme.css	27-5-2011 15:38	Cascading Style ...	31 KB	

The **theme.css** file contains the look and feel of the theme. It is possible to create your own theme or change an existing one. If you want to create your own theme, copy one of the existing theme directories to a new one within the **themes** sub-directory, such as the **MyTheme** sub-directory in the following:



Name	Date modified	Type	Size	Tags
compact	21-4-2011 13:59	File Folder		
green	21-4-2011 13:59	File Folder		
yellow	21-4-2011 13:59	File Folder		
metro	21-4-2011 13:59	File Folder		
MyTheme	22-4-2011 8:02	File Folder		

In your own theme directory, you will have full control, so the **theme.css** can be changed. It will never be overwritten by an update. In the standard themes directories, the **theme.css** file will be overwritten during an update. That is why a **custom.css** file can be created. All exceptions on the **theme.css** can be entered in this file. This file prevails over the **theme.css**. Initially, the **theme.css** is read while opening a page and after that, the changes in the **custom.css** are applied.

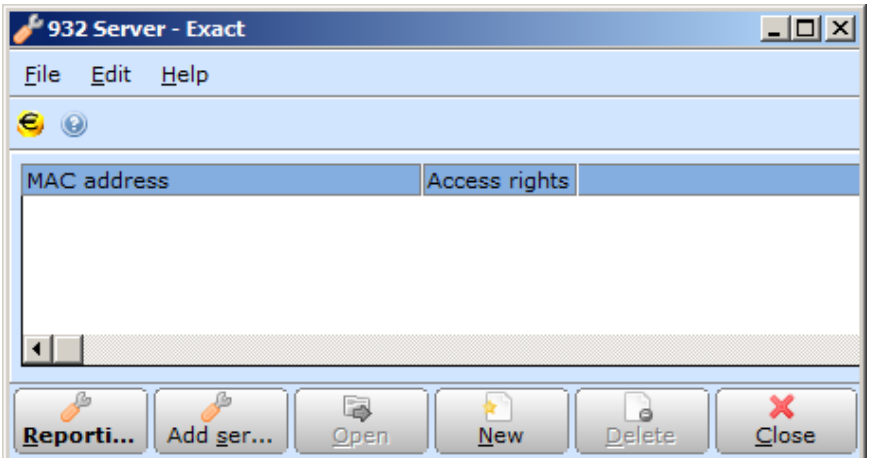
3.3.3 Connectivity

All data reading and writing from and to Exact Globe Next is handled by Exact Entity Services. The services are installed automatically during the Exact Globe Next installation or update. The **MAC address** settings need to be configured before it can be used.

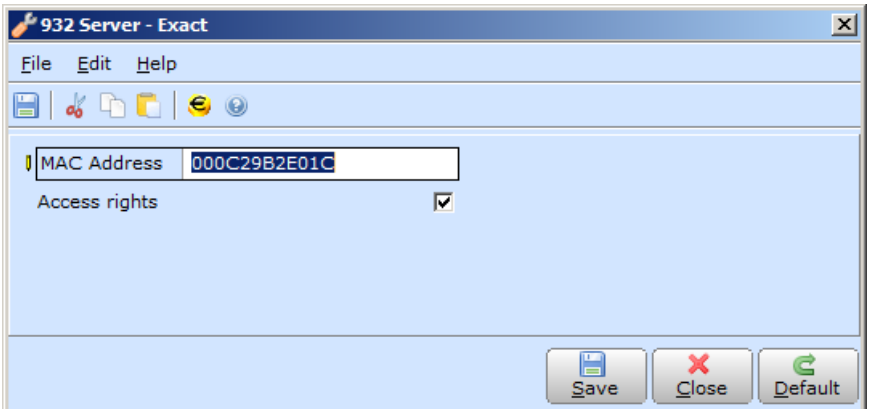
Access to Exact Globe Next from the entity services is secured using the MAC address check. In the Exact Globe Next database, you have to define the MAC address of the machine that is running the services (in this case, it is probably the IIS server). One way of retrieving the MAC address is to start Exact Globe Next on the system where the service should run (via System → HR & Security → Workstations).

To define MAC addresses and grant access to entity services:

1. Go to System → HR & Security → Workstations. The **Server** screen will be displayed, as shown in the following:



2. In the **Server** screen, click **New**.



3. Click **Default**. The MAC address key will be displayed at **MAC address**.
4. Copy **the** MAC address key, and then click **Close**.
5. Start **Microsoft SQL Server Management Studio**.

6. Open the Exact Globe Next database, and then expand the **Tables** folder to edit the table **dbo.BacoAccessServers**.
7. Paste the MAC address key in the columns **MachineName** and **MacAddress2**.

The columns **CheckIPAddress**, **CheckMachineName**, and **CheckMacAddress** should have the value **0**. The columns **IPAddress**, **MacAddress**, **MachineName2**, and **Division** should contain the value **NULL**, as shown in the following:

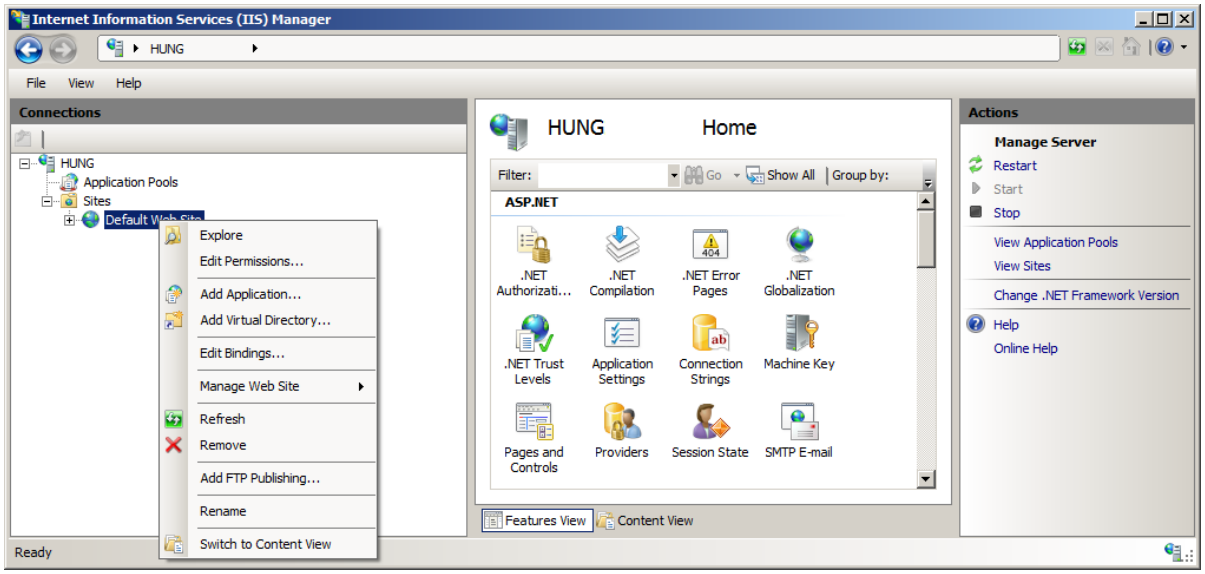
	ID	IPAddress	CheckIPAddress	MachineName	CheckMachineName	MacAddress	CheckMacAddress	MacAddress2	MachineName2	Division
1	1	NULL	0	000C29B2E01C	0	NULL	0	000C29B2E01C	NULL	NULL

3.3.4 Adding applications in Internet Information Services (IIS 7)

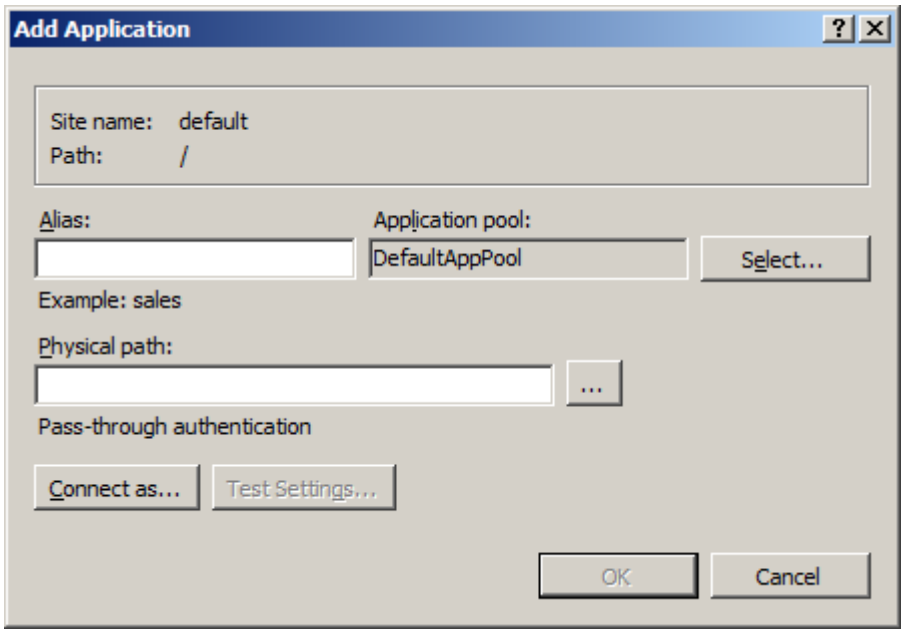
On the IIS server, you need to create an application for each of the portal that you want to create.

To create applications for B2B E-Commerce Portals on IIS servers:

1. Go to Start → Administrative tools → Internet Information Services (IIS) Manager, and then select the applicable server.
2. Expand the **Sites** folder, and then select **Default Web Site.**



3. Right-click **Default Web Site**, and then select **Add Application**. The **Add Application** screen will be displayed, as shown in the following:



4. Type a name at the **Alias** field. This is the name that you want to use in the URL of the B2B E-Commerce Portal, for instance **CommercePortal**.
5. Type or select an installation directory path at **Physical path**. The **Physical path** field should be defined with the installation directory that was entered while running the B2B E-Commerce Portal installation (with Exact Synergy Enterprise Product Updater).
6. Click **OK**.

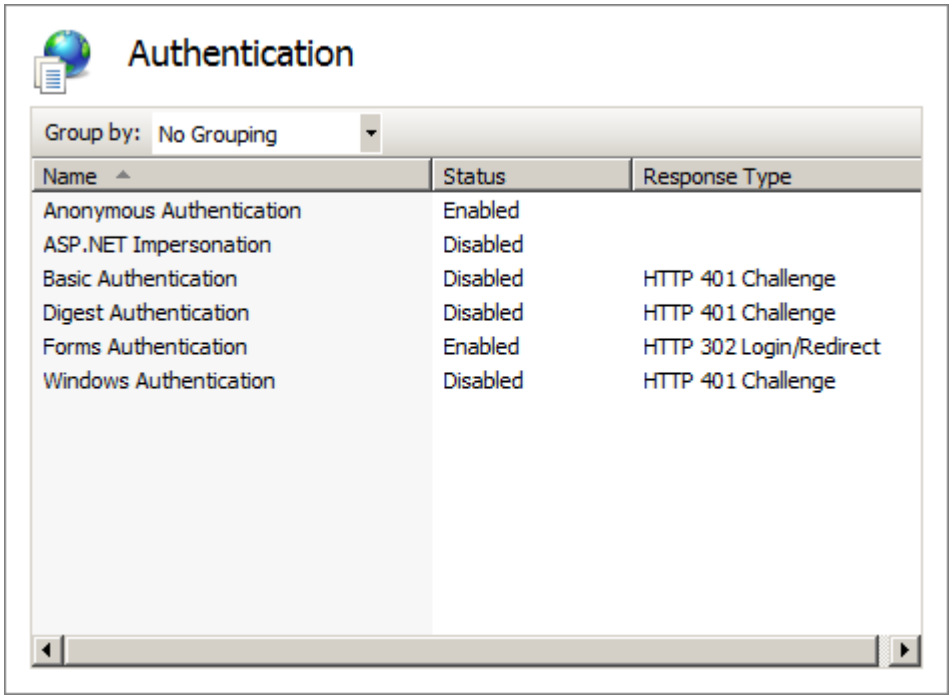
Caution:
Make sure that the application pool displayed at **Application Pool** is the same as the one used in Exact Synergy Enterprise. Not having the same application pool can result in a decrease of performance.

3.3.5 IIS authentication

On the IIS server, the authentication has to be set correctly to allow the correct authentication method to take place.

To configure Windows Authentication (IIS) for B2B E-Commerce Portals:

1. Go to Start → Administrative tools → Internet Information Services (IIS) Manager.
2. Expand the server node and the **Sites** folder.
3. Select the required B2B E-Commerce Portal application.
4. In the middle pane of the **Internet Information Services (IIS) Manager** screen, double-click the **Authentication** icon under the **IIS** section.
5. Right-click **Anonymous Authentication**, and then select **Enable**. Similarly, enable the **Forms Authentication** setting.
6. Disable the rest of the authentication methods, as shown in the following:

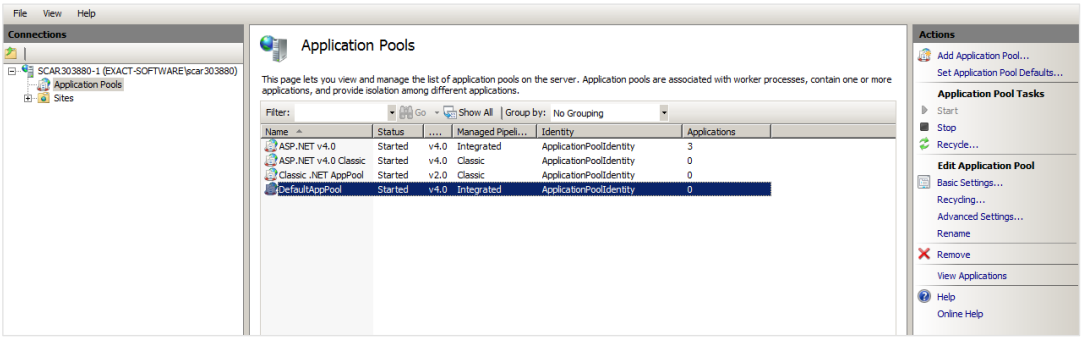


3.3.6 Configuring application pools

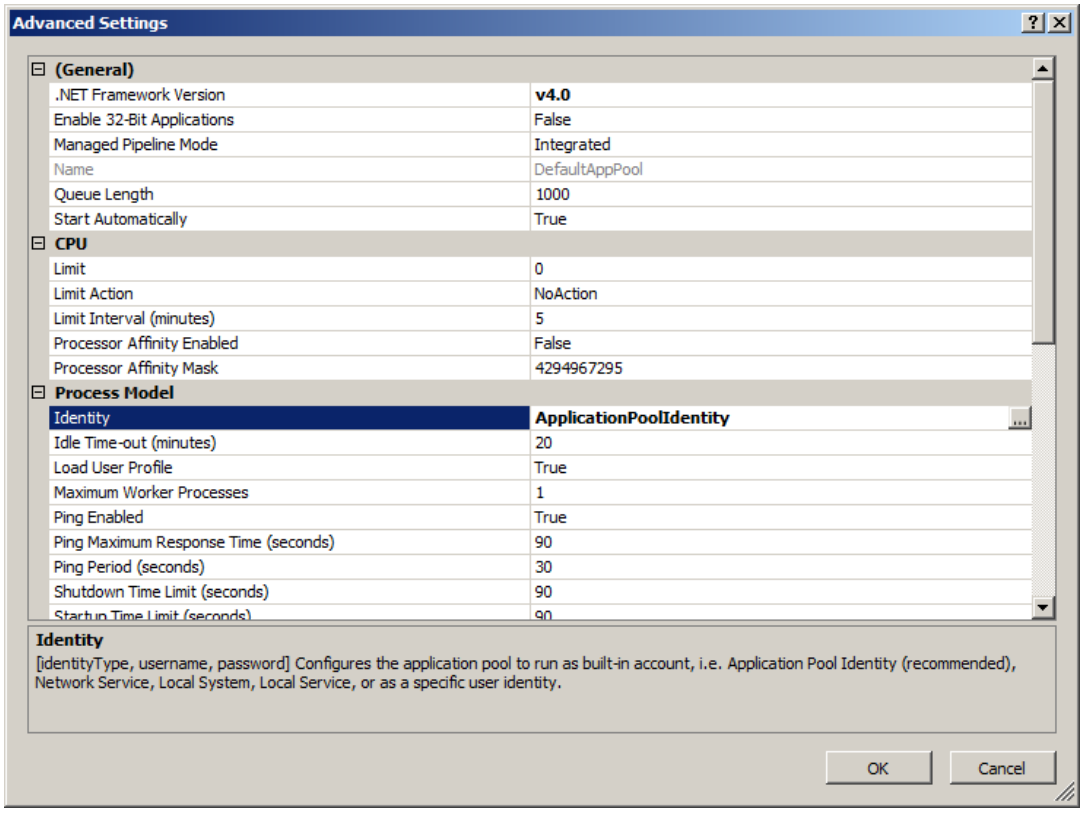
The application pool which associated with the selected portal on the IIS server has to be configured correctly. It is used by the B2B E-Commerce Portal to access Exact Globe Next. A valid Exact Globe Next username should be defined here to allow access to the correct user.

To configure application pools for B2B E-Commerce Portals:

1. Go to Start → Administrative tools → Internet Information Services (IIS) Manager.
2. Expand the applicable server, and then select **Application Pools**.
3. In the middle pane of the **Internet Information Services (IIS) Manager** screen, select the required application pool.

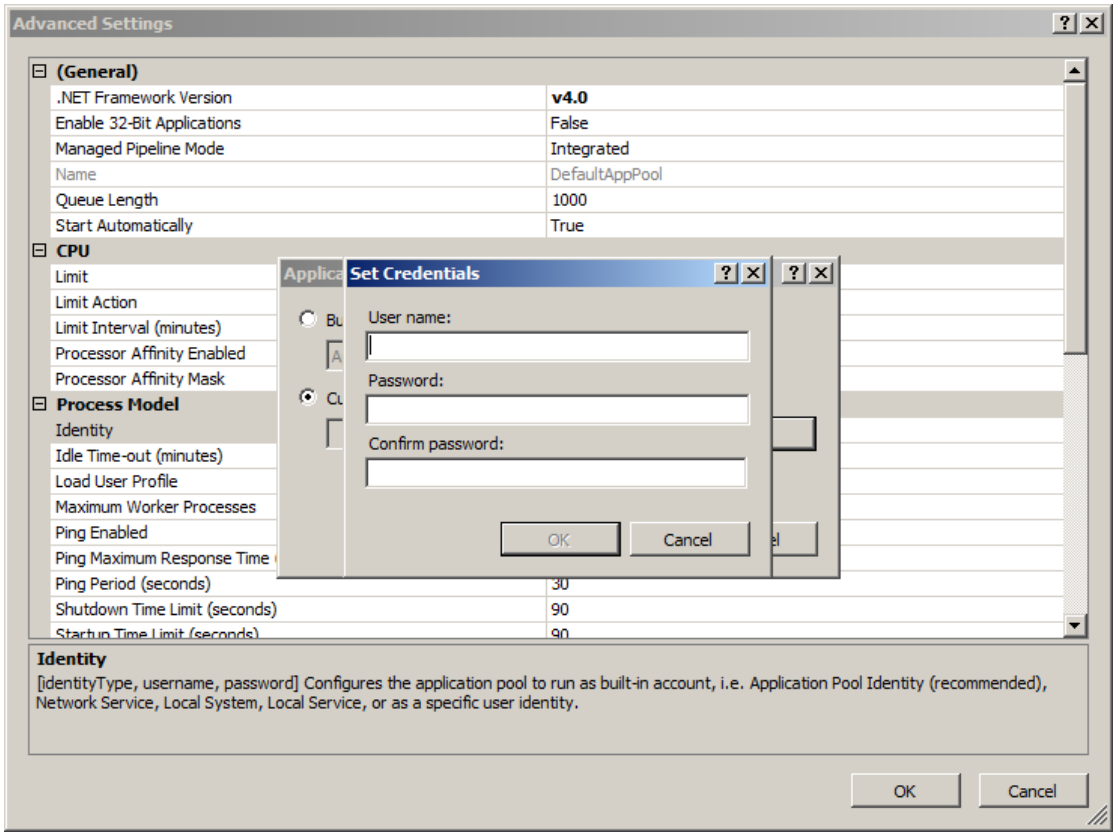


4. In the **Actions** pane, select **Advanced Settings**. The **Advanced Settings** screen will be displayed, as shown in the following:



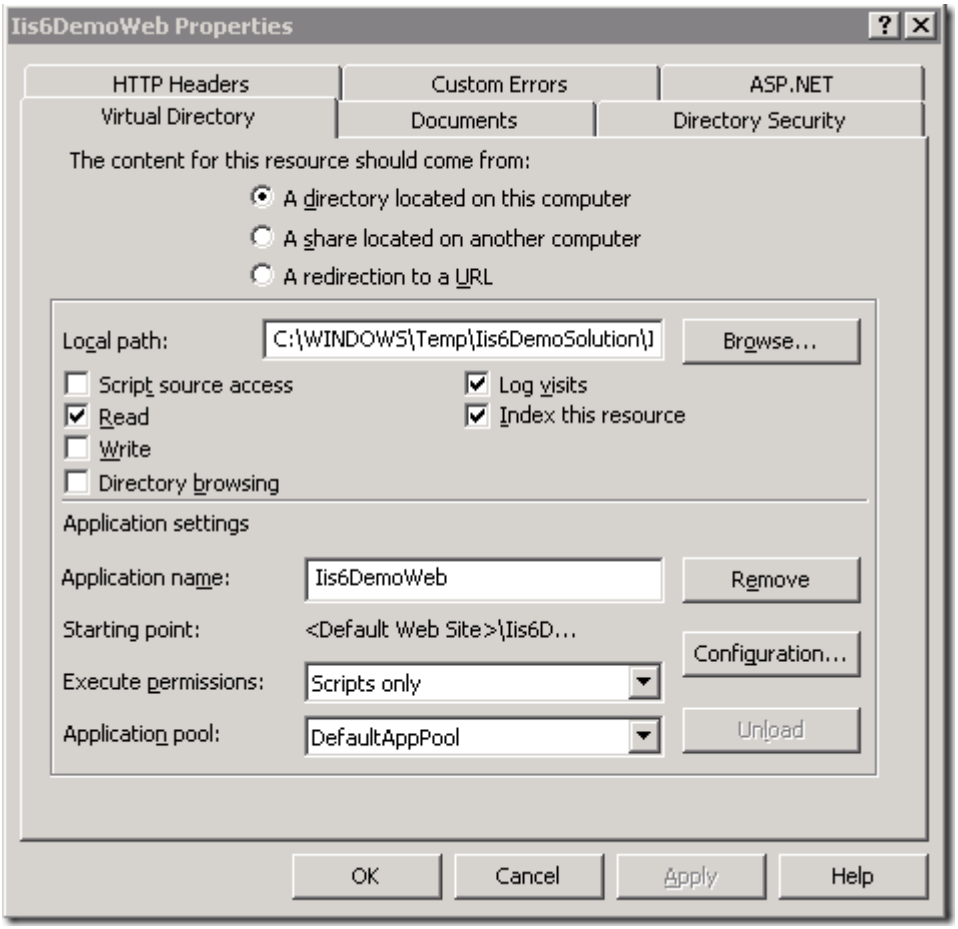
5. At **Identity** under **Process Model**, click ....

6. Select **Custom account**, and then click **Set** to define the correct username and password.

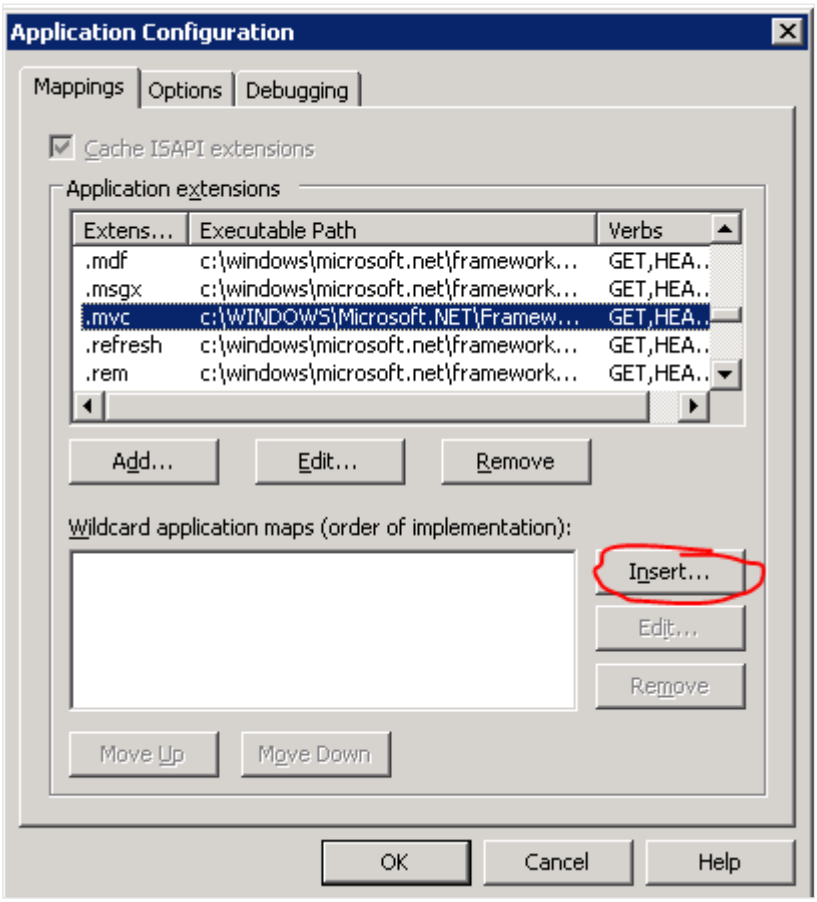


3.3.7 Setup for IIS 6

If you are using IIS 6, the setup is different. Once the B2B E-Commerce Portal application is created, go to the B2B E-Commerce Portal **Application Configuration** screen in IIS 6.



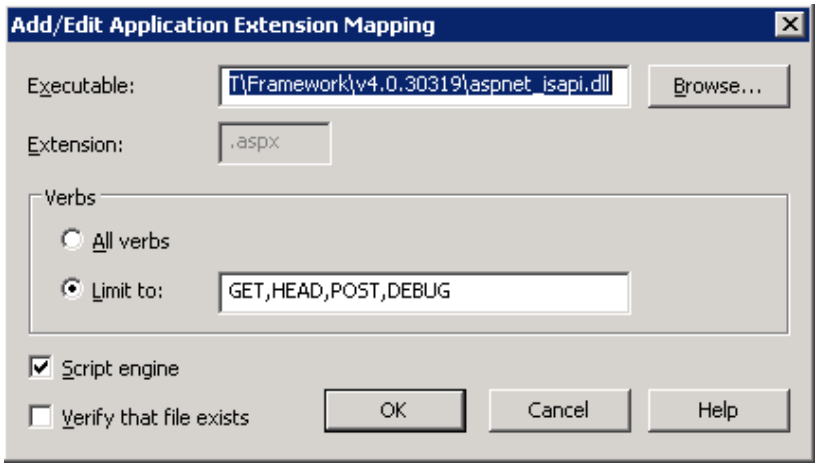
Under the **Virtual Directory** tab, click **Configuration**. The **Application Configuration** screen will be displayed, as shown in the following:



Under the **Mappings** tab, click **Insert**. At **Executable**, click **Browse** and map to **aspnet_isapi.dll** (all extensions will be handled by this dll file).

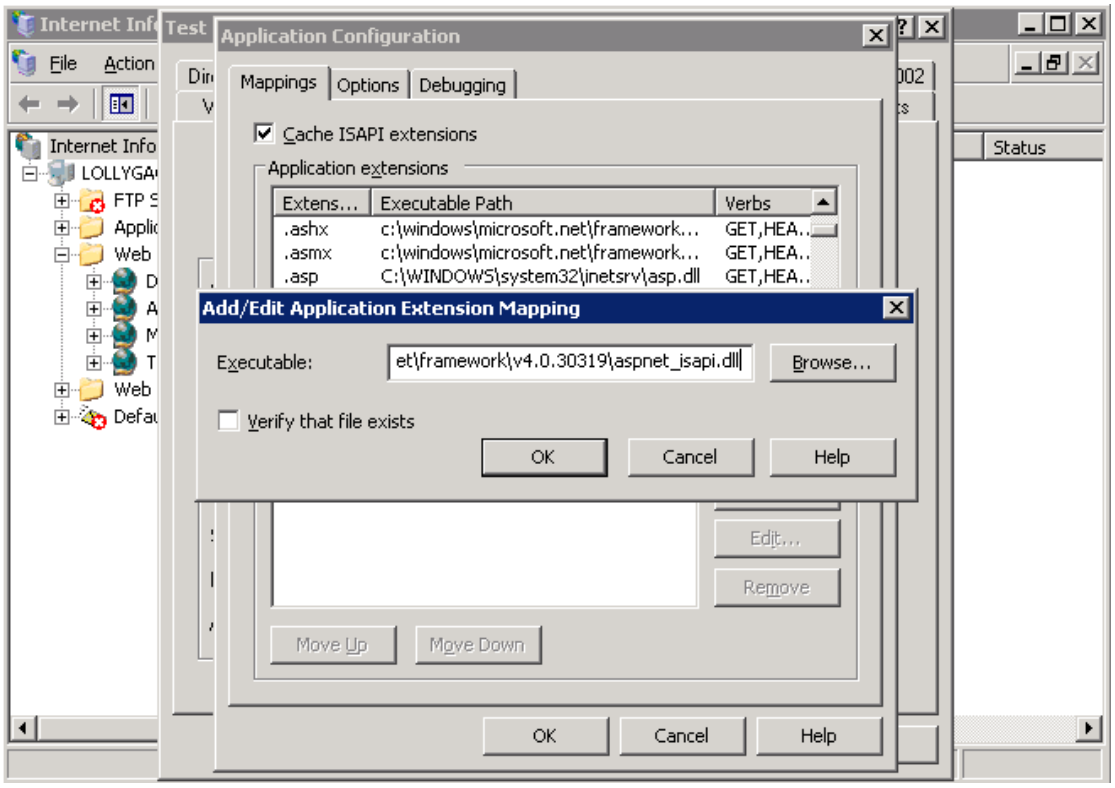
The **aspnet_isapi.dll** dll path should be residing in the directory, such as c:\windows\microsoft.net\framework\v4.0.30319\aspnet_isapi.dll. However, you need to ensure the right location on your machine.

To find out, select and double-click the **.aspx** file extension in the **Application extensions** list. The mapping screen will be displayed, as shown in the following:



Make sure that the **Verify that file exists** check box is cleared.

After adding the application extension mapping, define the **Executable** field with the executable path that you have found before.



4. SETTING UP B2B E-COMMERCE PORTALS

All functional ECP maintenance is done in Exact Synergy Enterprise. It can only be done by Exact Synergy Enterprise users with the **ECP administrator** role. For more information on the function rights applicable to the role, go to Modules → System → Setup → Security → Roles.

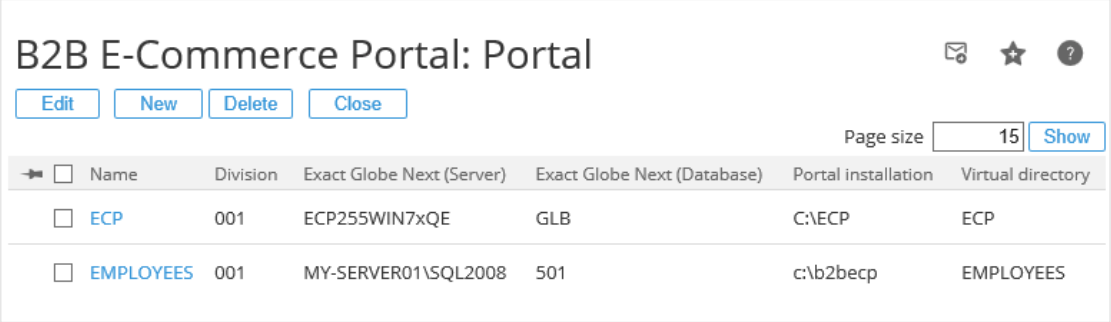
However, creating and setting up portals should be carried out on the IIS server.

4.1 BACK-OFFICE CONNECTION

Before a portal can be implemented, you should first make sure that the back-office connection towards Exact Globe Next is functioning. This connection can be maintained via Modules → System → Setup → Back office → Back office connection. For more information, see *Defining back office connection settings (Doc ID 19.390.125)* in Exact Synergy Enterprise.

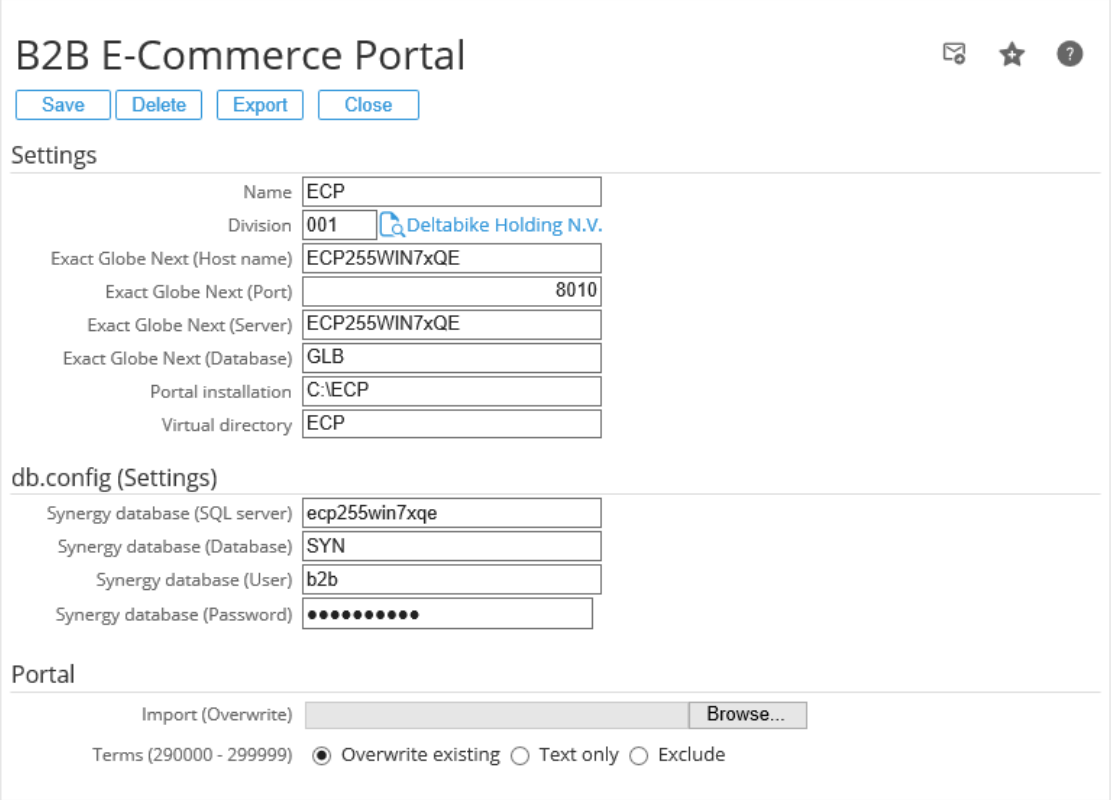
4.2 SETTING UP B2B E-COMMERCE PORTALS

The **B2B E-Commerce Portal: Portal** page, accessed via Modules → Documents → Setup → Maintenance → ECP Maintenance, displays all the B2B E-Commerce Portals that are available.



Each B2B E-Commerce Portal has the following basic settings. These settings can be edited by selecting the check box next to the required portal, and then clicking **Edit**. You can also create another portal by clicking **New**.

The following displays the basic settings of the portal named **ECP** in the edit mode:



To set up B2B E-Commerce Portals:

1. Go to Modules → Documents → Setup → Maintenance → ECP Maintenance and click **New**.
2. On the **B2B E-Commerce Portal** page, define the following fields under the **Settings** section:
   - **Name**: Type a name for the portal. This name is for internal use only.
   - **Division**: Type or select the division where the B2B E-Commerce Portal is linked to; one portal can be linked to one division. Multiple portals can be linked to the same division.
   - **Exact Globe Next (Host name)**: Type the name of the IIS server on which Exact Globe Next is running.
   - **Exact Globe Next (Port)**: Type “8010”.
   - **Exact Globe Next (Server)**: Type the SQL server on which the Exact Globe Next database is running, including instance name, if applicable.
   - **Exact Globe Next (Database)**: Type the name of the Exact Globe Next database to which this portal is linked.
   - **Portal installation**: Type the installation directory path that was entered during the installation of the B2B E-Commerce Portal (via Exact Synergy Enterprise Product Updater).
   - **Virtual directory**: Type the name of the virtual directory that was defined on the IIS server.
3. Under the **db.config (Settings)** section, define the following fields:
   - **Synergy database (SQL server)**: Type the SQL server on which the Exact Synergy Enterprise database is running, including instance name, if applicable.
   - **Synergy database (Database)**: Type the name of the Exact Synergy Enterprise database.
   - **Synergy database (User)**: Type the username that you have created on the SQL Server for the B2B E-Commerce Portal connection.
   - **Synergy database (Password)**: Type the password that you have created on the SQL Server for the B2B E-Commerce Portal connection.
4. Click **Save**.

Note:
All fields with the "**!**" icon are mandatory.

After saving the data, the **dB.config** file will either be created or modifed, depending on whether you have created a portal or edited a portal. The **dB.config** file is stored in the folder where Exact Synergy Enterprise is installed after creating or opening a database.

Instead of creating a portal, it is also possible to import portal pages and widgets from another environment. For this, you have to point to a XML file on the hard drive that contains the correct information. If you are overwriting an existing portal, you should decide what you want to do with the terms that are already available in the current portal.

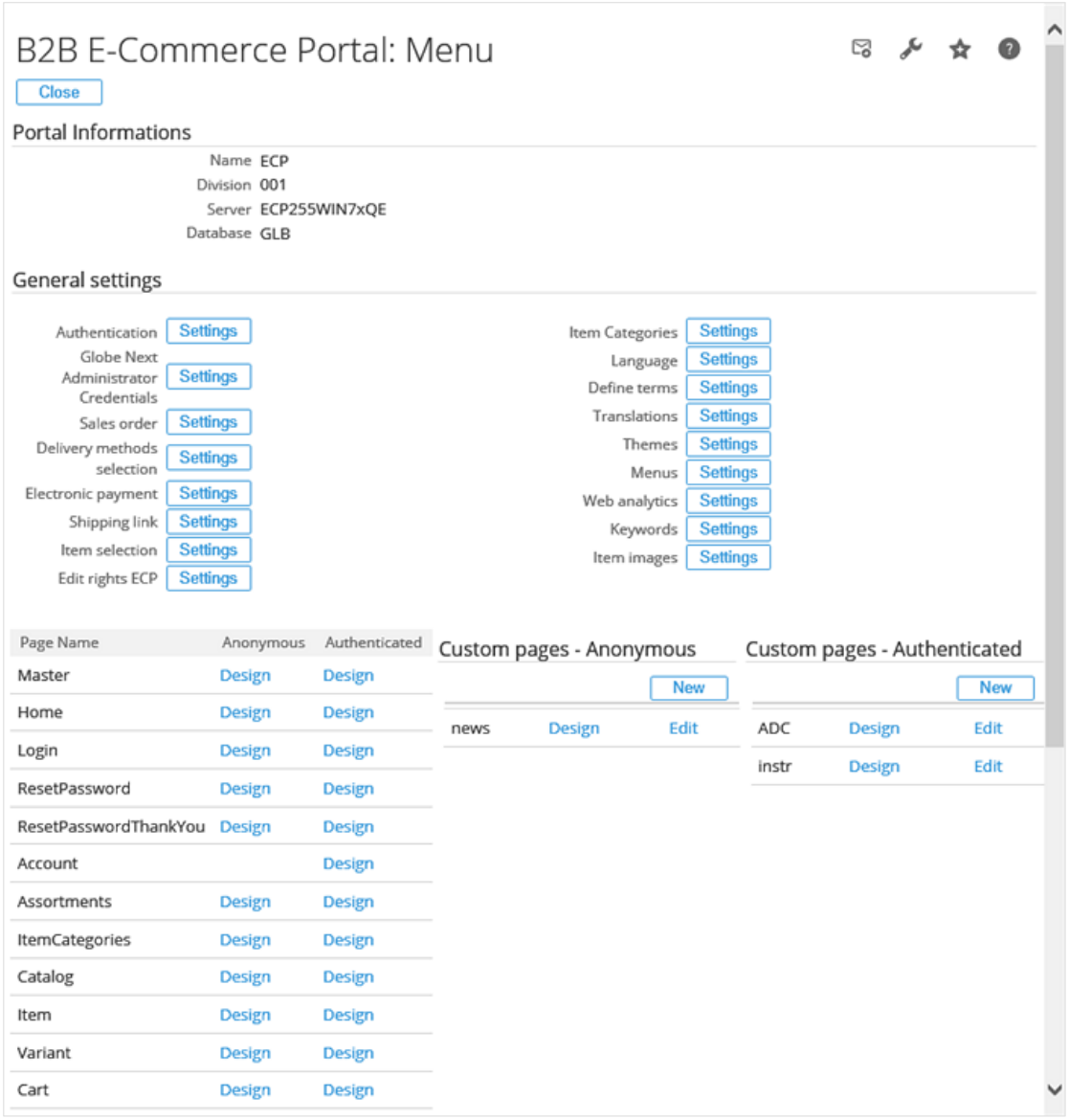
On the **B2B E-Commerce Portal** page, clicking the **Export** button will result in exporting the current portal pages and widgets to an XML file that can be imported in another environment.

Note that when you use the export and import feature, you do not export and import all the settings and widget settings. If the settings are linked to Exact Globe Next or to requests or documents in Exact Synergy Enterprise, the settings will be empty after the import.

For each portal, a virtual directory has to be created on the IIS server. This can be done via the **Internet Information Services (IIS) Manager**. For more information on the IIS section, see *Chapter 3 Installation and Configuration*.

After a B2B E-Commerce Portal is created, the portal settings can be viewed by clicking the required portal hyperlink in the **Name** column on the **B2B E-Commerce Portal: Portal** page.

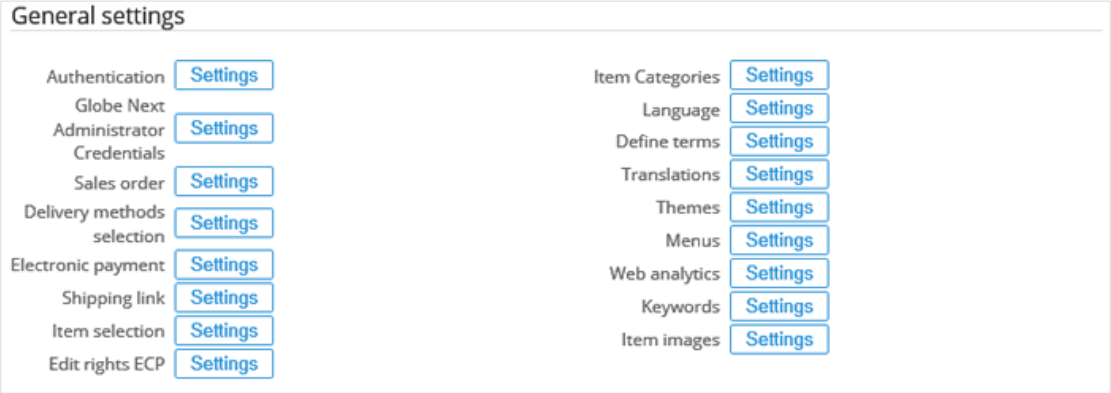
The **B2B E-Commerce Portal: Menu** page will be displayed, as shown in the following:



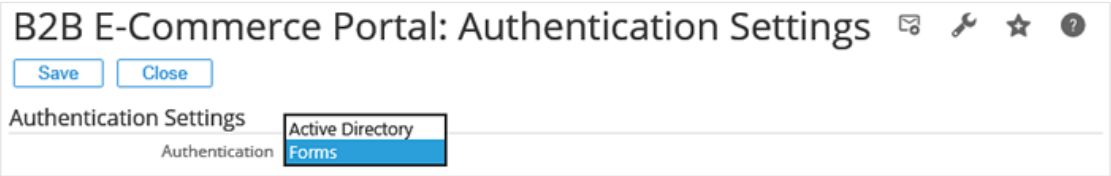
All settings for the portal can be modified on this page. This includes the settings for the widgets and pages for the portal. The **Portal Information** section contains the basic settings for the portal. The functional and technical settings are displayed under the **General settings** section. The other sections are used to configure the pages (content pages and custom pages) for anonymous and authenticated visitors or users.

4.2.1 Settings

This section describes each setting available under the **General settings** section of the **B2B E-Commerce Portal: Menu** page.



Authentication settings

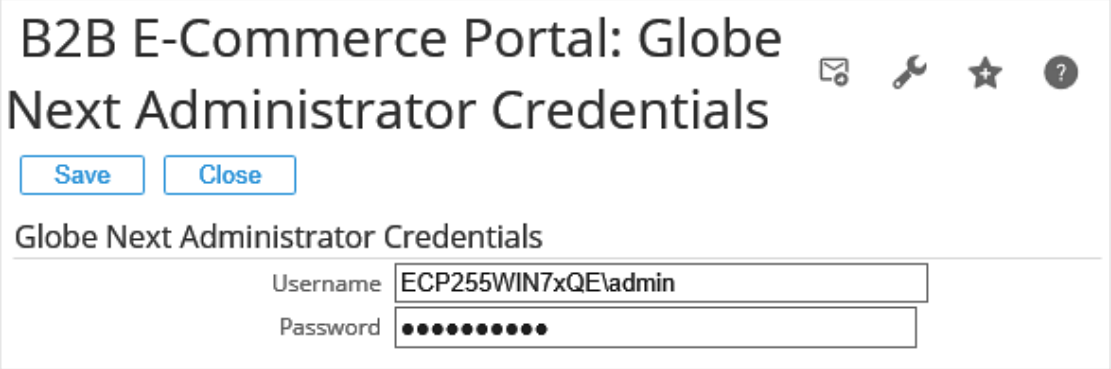


There are two methods of authentication on the B2B E-Commerce Portal:

- **Active Directory:** Every B2B E-Commerce Portal visitor or user has their own **Active Directory** user on the server. This is the way the Exact Synergy Enterprise customer and reseller portal authenticates the visitor or user. Note that Microsoft charges you per user.
- **Forms:** With the **Forms** authentication method, the B2B E-Commerce Portal visitor or user authenticates by a username and a password. These are maintained on the contact person card in Exact Synergy Enterprise.

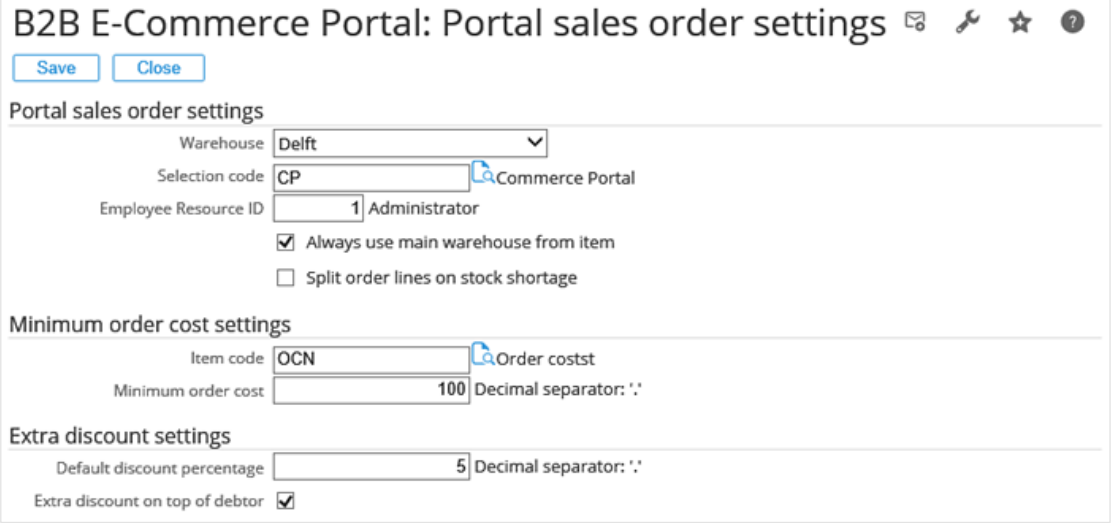
If the **Active Directory** authentication is enabled, the domain has to be defined, and the **Customer Portal** (YA1850) or **Reseller Portal** (YA1860) module should be included in your copy of the Exact Synergy Enterprise license so that you can make use of the customer or reseller portal functionality.

Globe Next Administrator Credentials settings



The entity service which manages all data reading and writing from and to Exact Globe Next will use the user information that is typed here. This should be an active user with administration rights for Exact Globe Next.

Sales order (or Portal sales order) settings



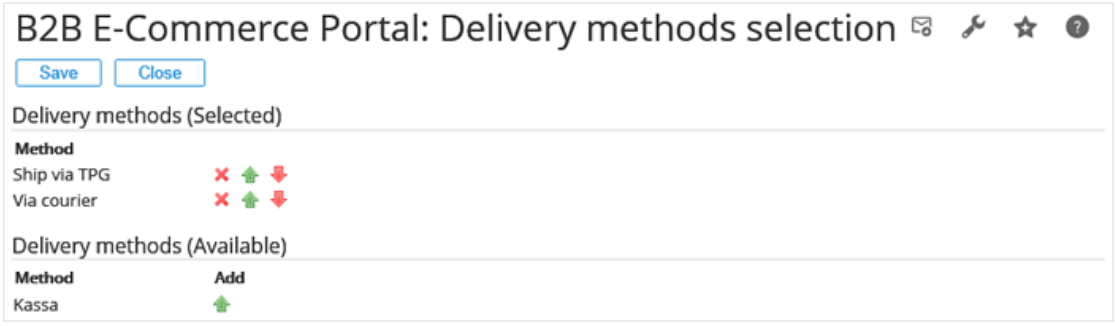
You can decide which warehouse, selection code, and employee to be used for the sales order creation in Exact Globe Next under the **Portal sales order settings** section. Besides that, you can also decide which warehouse to be used in the sales order, either the warehouse (first setting) or the main warehouse of the item. In case of stock shortage, it is possible to split order lines. In that case, a line with the total that can be delivered from stock and a line with the remaining quantity will be created. This line will get the delivery date set to **31-12-2299**.

Under the **Minimum order cost settings** section, you can impose extra charges automatically if the total order amount is less than the amount defined at **Minimum order cost**. The charge will be added to the sales order as a separate order line. The amount will be calculated using the Exact Globe Next sales price, price list, and price agreement algorithms.

When your customers order via the B2B E-Commerce Portal, it will save you money. To encourage your customers to use the B2B E-Commerce Portal, you can give them a discount for each order entered via the B2B E-Commerce Portal. You can decide to calculate this discount on top of the debtor discount that is defined in Exact Globe Next, or to replace the debtor discount with this discount. These settings can be defined under the **Extra discount settings** section.

Delivery method selection settings

During the check-out process on the B2B E-Commerce Portal, visitors or users can select a delivery method. These delivery methods are maintained in Exact Globe Next. There might be more methods in Exact Globe Next than those you want to display on the B2B E-Commerce Portal. The **B2B E-Commerce Portal: Delivery methods selection** page enables you to select the delivery methods to be displayed on the portals.



Electronic payment settings

The B2B E-Commerce Portal has built-in support for electronic payments. Exact Synergy Enterprise has selected Ogone as its payment services provider. For more information on supported payment methods per country and subscription, visit Ogone at www.ogone.com.

In case you have subscribed to Ogone and you want to enable electronic payment, the payment condition for electronic payment from Exact Globe Next should be linked here.

When a purchase is made via the portal, the transaction data will be passed to the Ogone payment gateway for further processing using a secure connection defined at **Ogone URL**. This URL address is given by Ogone. Once the transaction authorization request has been verified, the response is returned to the portal. If the response is successful or accepted, the payment condition in the sales order in Exact Globe Next will reflect the successful payment condition setting on this page. Otherwise, the payment condition status in the sales order will remain unchanged.

This allows for better integration when tracking electronic payment statuses in sales orders (generated from the B2B E-Commerce Portals) in Exact Globe Next.

Note:
You can also pass the transaction data to a test system so that you can check or verify the integration of the B2B E-Commerce Portals with the Ogone payment service provider whenever you change the settings for your B2B E-Commerce Portals. Transactions made to a test system are not processed towards attaining authorization from the bank. The default Ogone URL is linked to the Ogone test system address at *https://secure.ogone.com/ncol/test/orderstandard.asp*. The URL format must begin with “https://” followed by the domain name, such as “https://example .com”.

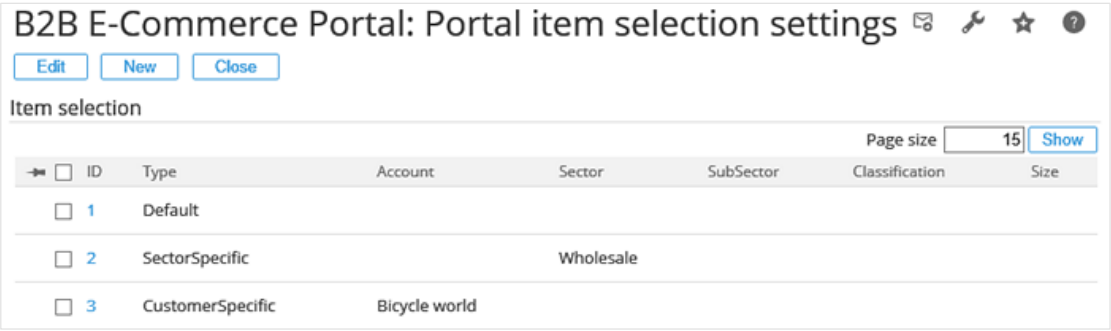
An error message will be displayed if the field is left blank, or if the URL format defined is not valid.

Shipping link settings

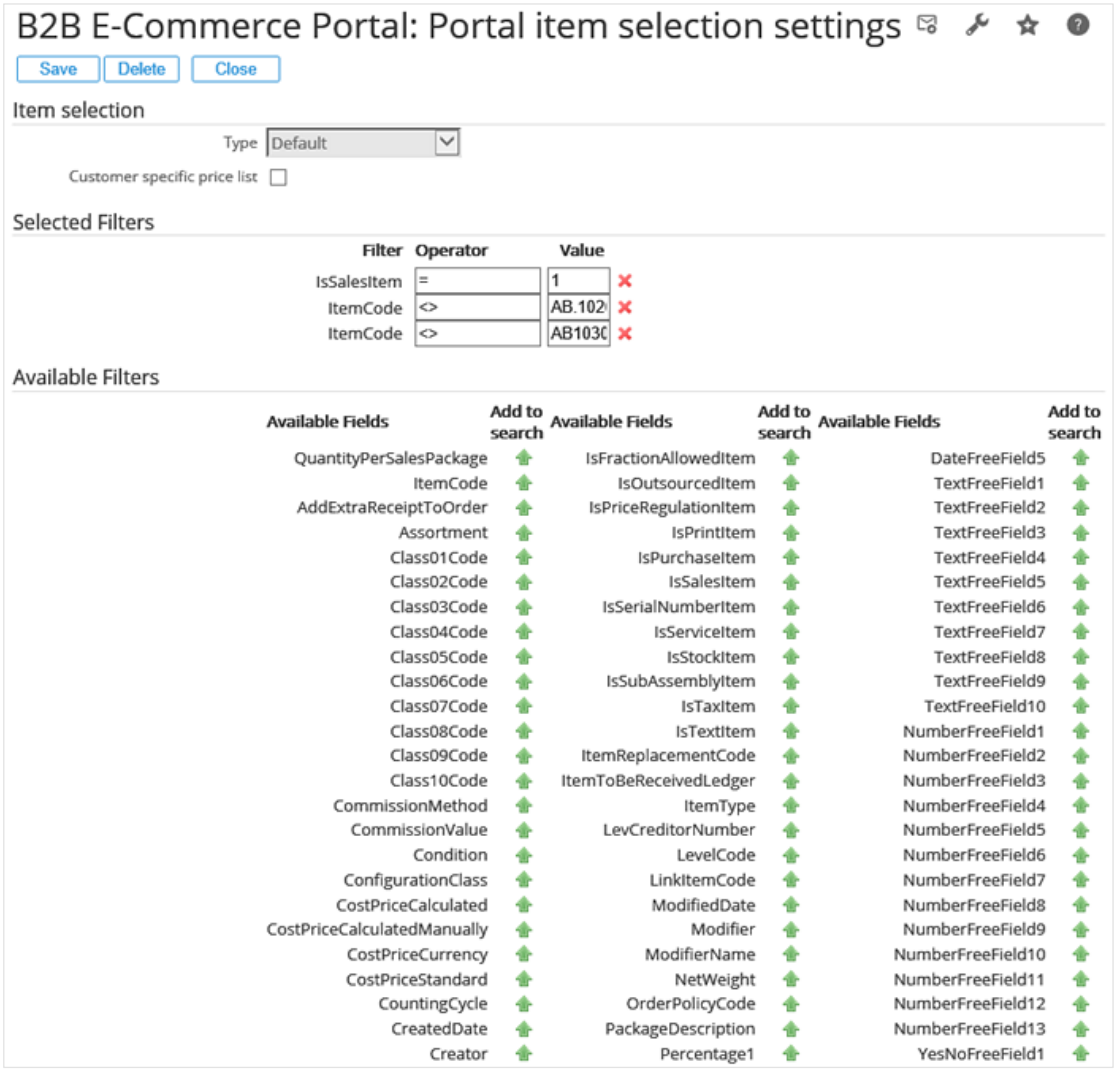
The B2B E-Commerce Portal has the capability to link with Transwise to calculate shipping costs. Depending on the carrier, service level time, and service level other information (all defined by Transwise), the delivery method in Exact Globe Next can be linked here.

Item selection settings

You might not want to display every item that has been created in Exact Globe Next on the B2B E-Commerce Portal. On the B2B E-Commerce Portal, a flexible item selection has been made available. Every item field in the Exact Globe Next database can be used as a filter. The item selection can be done by default (for all visitors or users), or according to the customer-specific, sector-specific, subsector-specific, classification-specific, or size-specific option. These are all properties that you can link to an account in Exact Synergy Enterprise.



On this page, you can modify an existing selection or add a new selection.

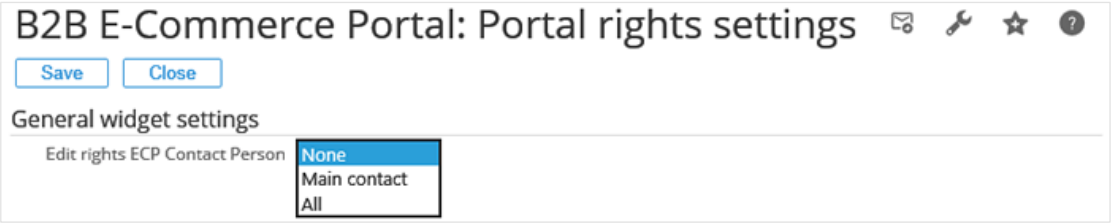


With the **Customer specific price list** option selected, you can display the items with price lists matching the one(s) predefined for the account(s) of a specific type such as customer-specific, sector-specific, subsector-specific, classification-specific, or size-specific.

Tip:
By selecting the Customer specific price list check box, you can also display different items in each language independently for the anonymous users across different countries. For more information, see *Language settings*.

Click the icon at the end of the field names to add the fields (items) to the filter. Then, define the operator and value at **Operator** and **Value** at the top of the page. The default filter applies to both anonymous and authenticated access. There is no difference between them.

Edit rights ECP settings



Access to the portal(s) is maintained via the contact cards in Exact Synergy Enterprise. You can define the person who has the authority to change the right, which can be maintained by your customers. The options are:

- None
- Main contact person of your customers
- All contact persons of your customers

The Exact Synergy Enterprise license is required in order to change the right in the customer portal(s).

Item Categories settings

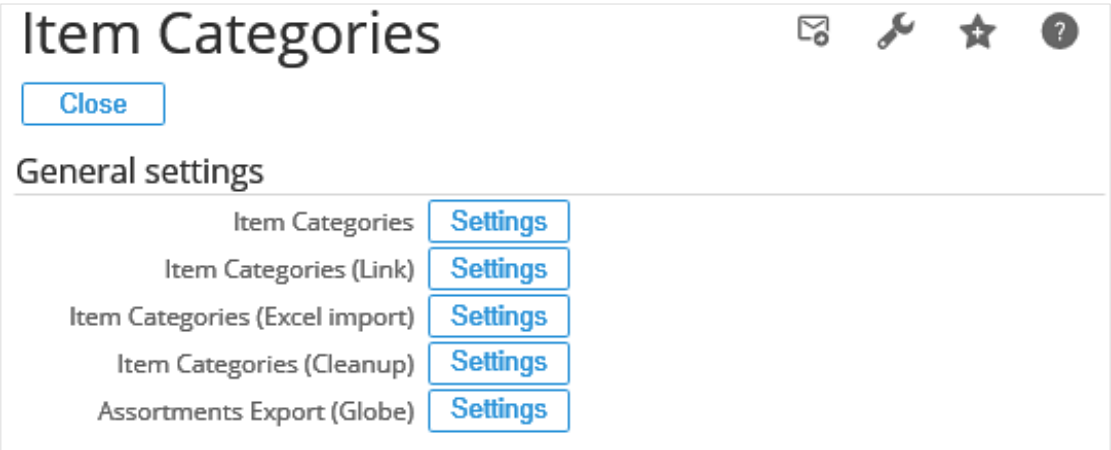
The item categories functionality has been added to the B2B E-Commerce Portal to support you in categorizing (tagging) items in a way different from using item assortments.

With item assortments, the Exact Globe Next assortment structure can be displayed on the portals with a drill down possibility, going from assortment to sub-assortments and finally the underlying items.

There are a number of down sides to using item assortments:

- Item assortments are often used for internal purposes and are not meant for structuring items for the portal.
- It is not possible to link an item to more than one assortment on the same level.
- It is not possible to display items only for specific dates within a specific assortment.
- If no items are linked to an assortment, the assortment cannot be hidden on the portal.
- Drilling down from assortments to sub-assortments is not fast.

The item categories functionality does not have all of the above down sides. It helps you to categorize items for each individual portal specifically and offers you a lot of flexibility. The item category data is not stored in Exact Globe Next, but in Exact Synergy Enterprise. The number of categories and sub-categories is indefinite and one item can belong to multiple categories. Click **Settings** next to **Item Categories**. The **Item Categories** page will be displayed with the following settings:



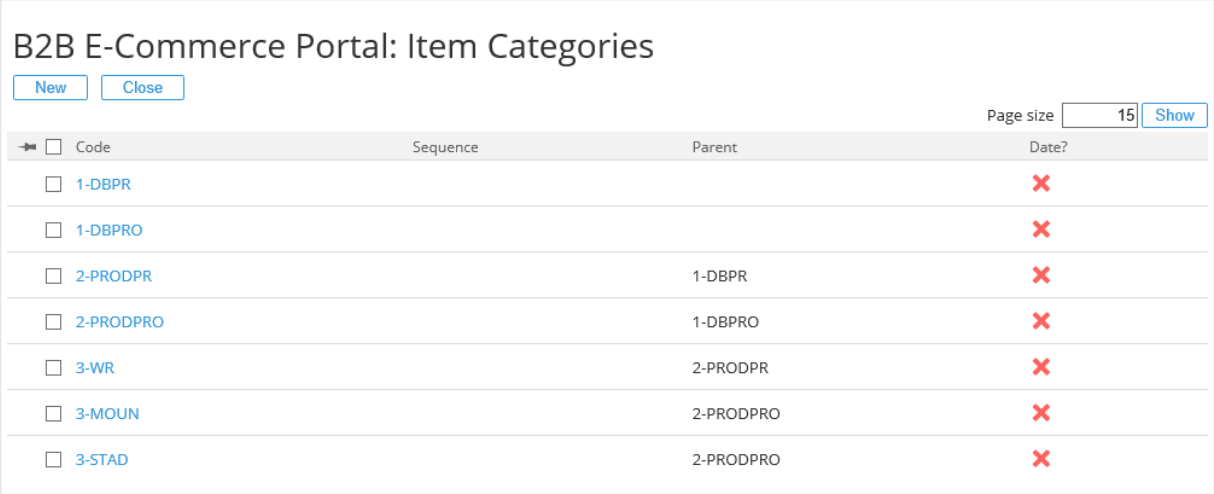
Basically, two types of information have to be maintained:

- The **Item Categories** information, which refers to the item categories.
- The **Item Categories (Link)** information, which refers to the items in each category.

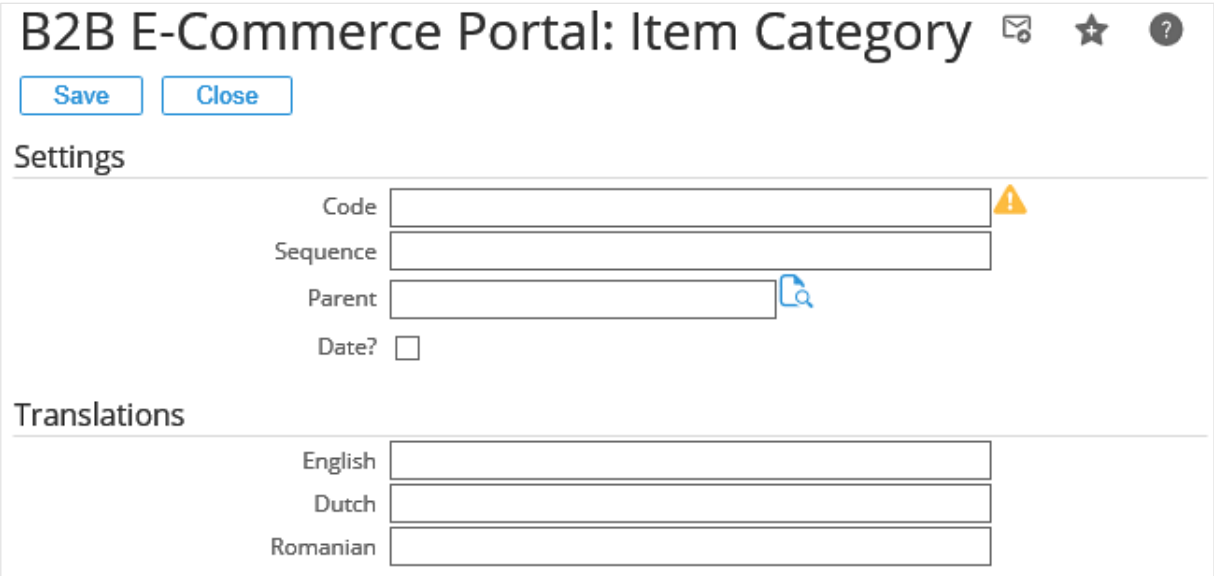
Both tables can be imported from a Microsoft Excel worksheet or can be maintained manually. Besides that, the **Item Categories (Cleanup)** functionality is available to get rid of pollution in the tables. For instance, when an item in Exact Globe Next is deleted, it should also be deleted in the item category link table.

Item Categories settings

The following displays the list of item categories on the **B2B E-Commerce Portal: Item Categories** page:



Each item can be categorized into different categories by defining the sequence and parent relationship among the items. Click **New** to create an item category. The **B2B E-Commerce Portal: Item Category** page will be displayed, as shown in the following:

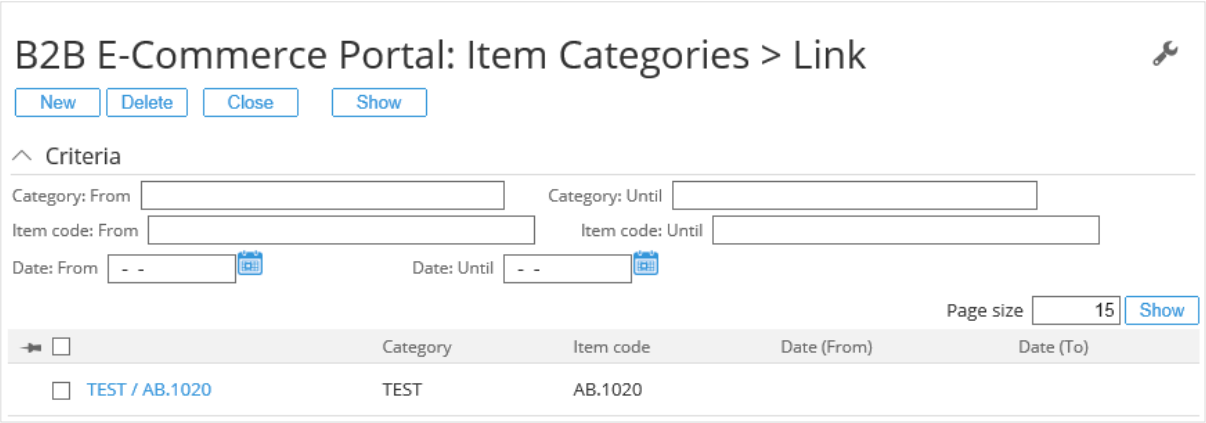


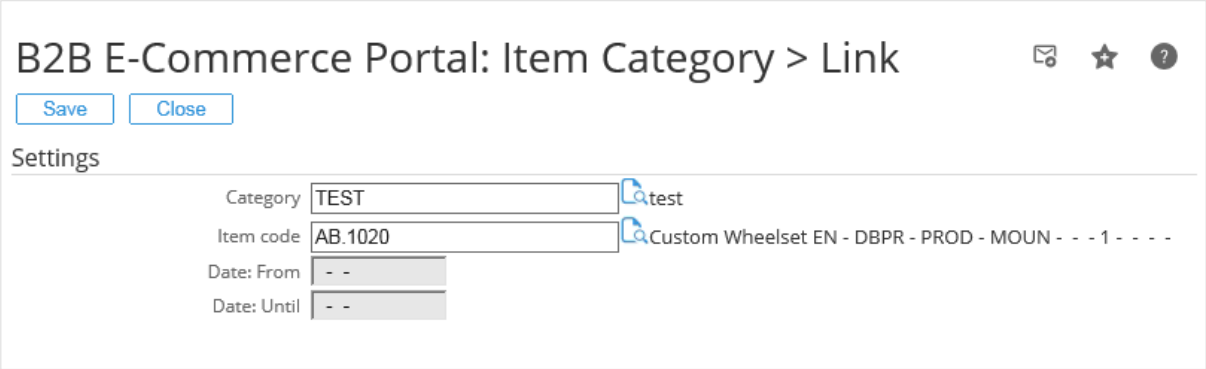
For each item category, define the following information:

- At **Code** under the **Settings** section, type a code for the item category. This information is mandatory and no space is allowed.
- At **Sequence**, type the sequence or level where this code will be displayed on the portal.
- At **Parent**, type or select the parent code to be linked to this category as sub-category.
- Select the **Date?** check box to add dates to the item category or item links. This refers to the **Use dates** of the item category.
- Under the **Translations** section, type the translation descriptions for each preferred language field.

Item Categories (Link) settings

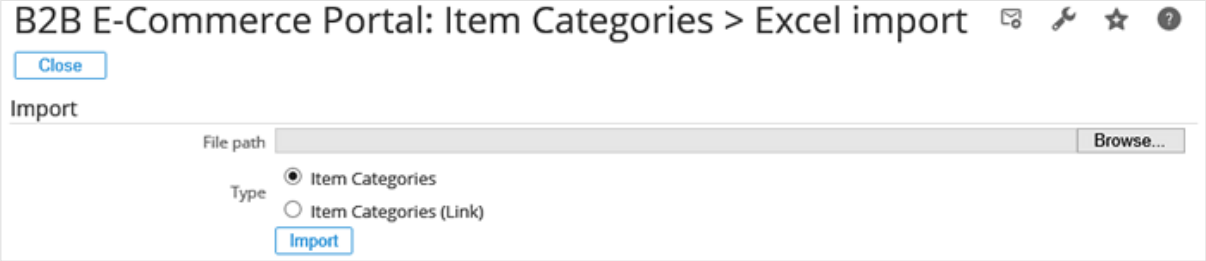
The following displays the list of item links on the **B2B E-Commerce Portal: Item Categories > Link** page:





With this maintenance feature, items can be linked to sub-categories with a date selection (if applicable).

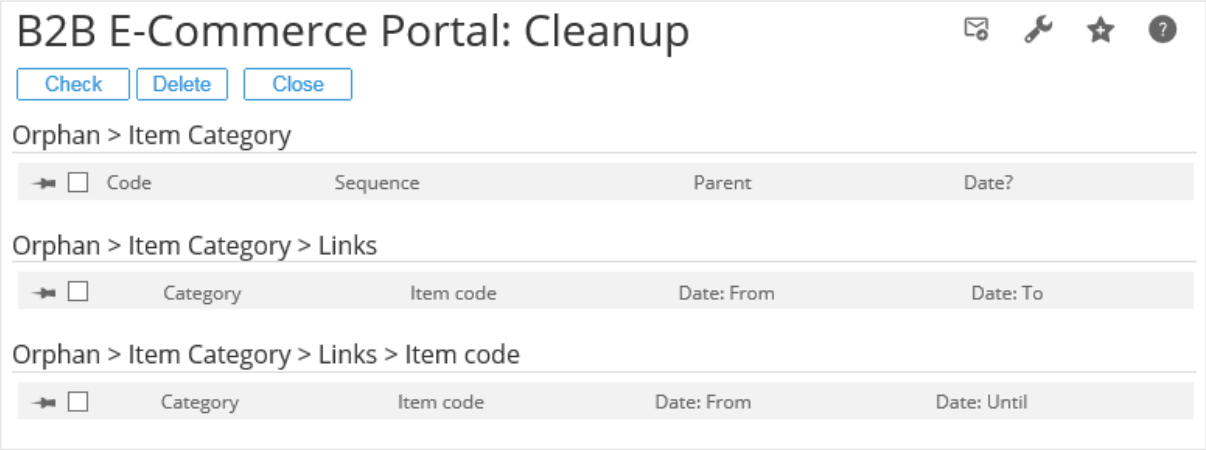
Item Categories (Excel import) settings



With this option, you can import item categories and links from a Microsoft Excel worksheet. Click **Browse** at **File path** to select an Excel file to be imported to the B2B E-Commerce Portal.

Select either **Item Categories** or **Item Categories (Link)** to import item categories or links, respectively at **Type**, and then click **Import**.

Item Categories (Cleanup) settings

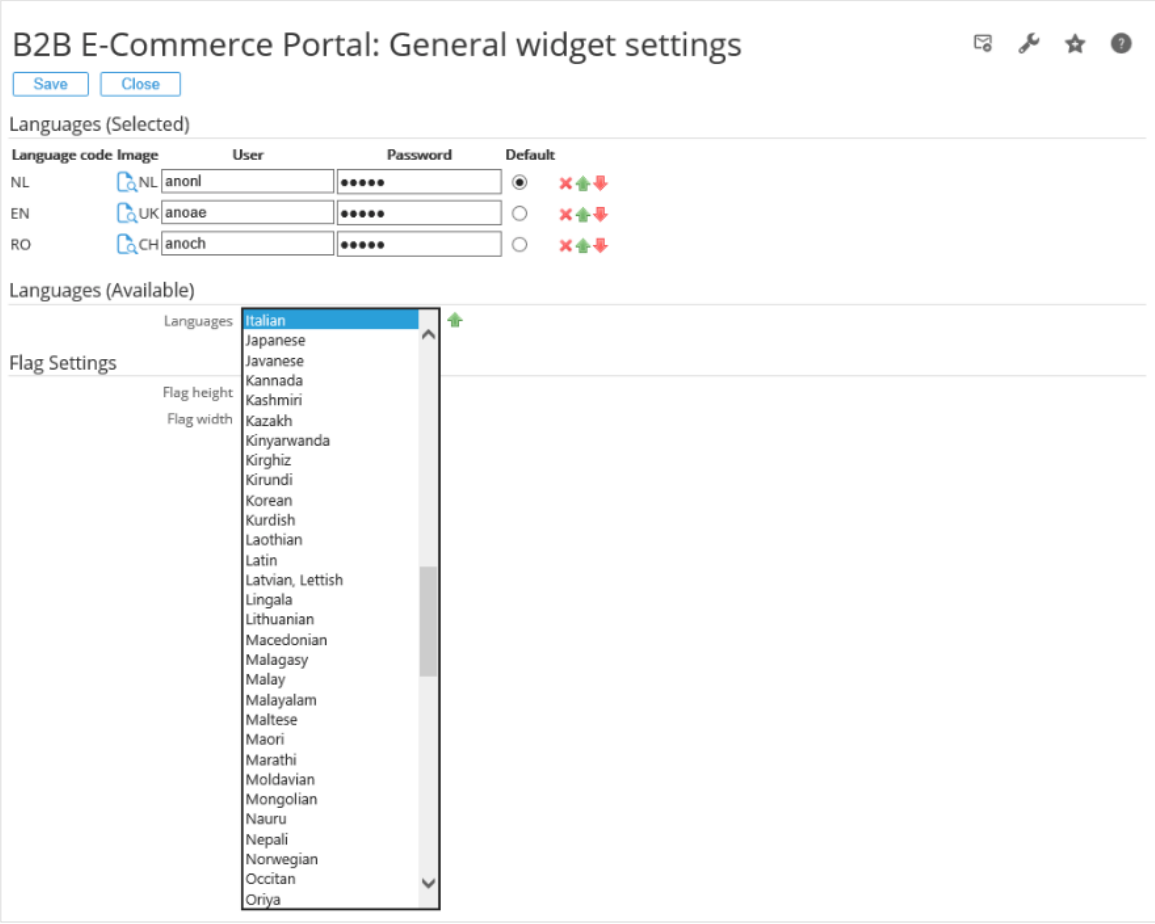


This function will validate item links and categories and will propose to delete item links and/or categories when they are not valid anymore. For instance, when an item is deleted from Exact Globe Next, the **Cleanup** feature will validate, and then delete it from the item links and/or categories once you click **Check**, and then **Delete**.

Assortments Export (Globe) settings

This function will help you to export Exact Globe Next assortments and items to either Microsoft Excel or directly to the Exact Synergy Enterprise database.

Languages settings



With this setting, you can select all the languages that the portal should support. Per language, an image can be linked from Exact Synergy Enterprise (image type is **Logo**) by clicking in the **Image** column. This image will be displayed on the B2B E-Commerce Portal in the **Language** widget. The **Flag height** and **Flag width** fields under the **Flag Settings** section are applicable for all selected images. The default language for the portal should also be defined.

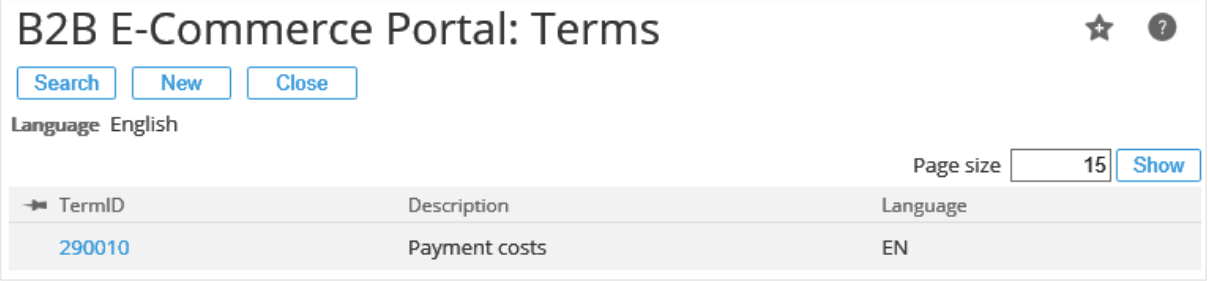
The sequence of displaying the languages in the **Language** widget can be changed by clicking the and icons.

Defining a user ID and password at **User** and **Password** for each language will activate the **Anonymous Ordering** functionality. For more information, see *Chapter 6 Anonymous Ordering*.

When you save these settings, all language dependent settings, such as term translations and widgets will be changed automatically to accommodate the new changes.

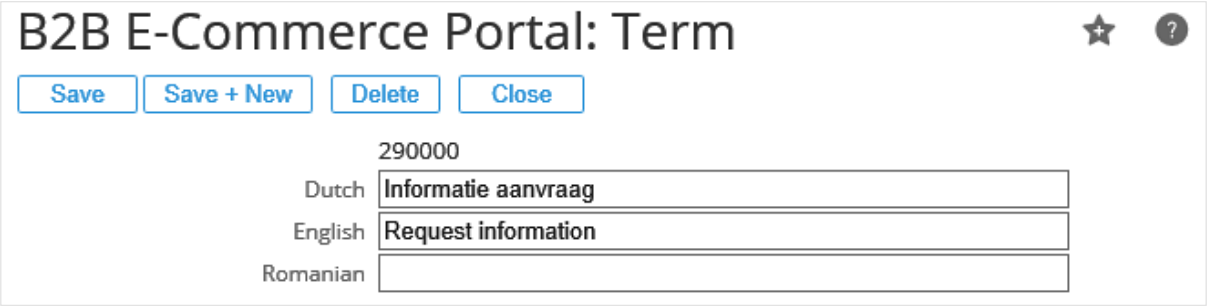
Tip:
Once the anonymous access has been configured, select the **Customer specific price list** check box under the **Item selection** section on the **B2B E-Commerce Portal: Item selection settings** page. This step allows you to display different items in each language independently for the anonymous users across different countries. For more information, see *Item selection settings*.

Terms settings



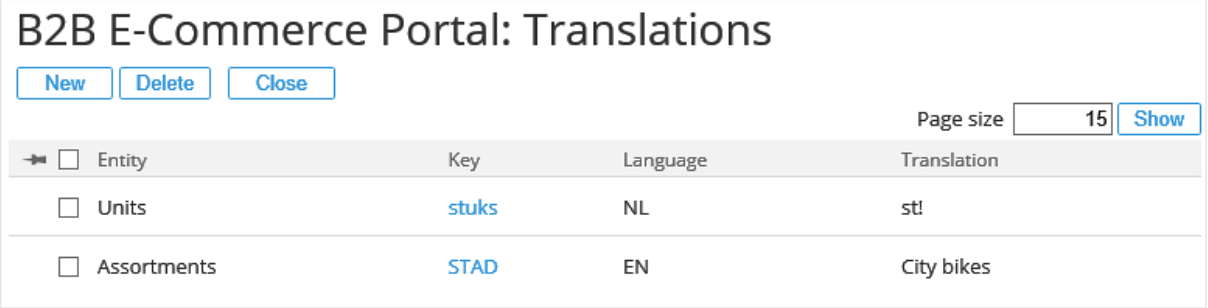
The B2B E-Commerce Portal is a multi-language solution. That means that a visitor or user should be able to view the B2B E-Commerce Portal in his or her own language. Exact has its own translation option which is implemented by using terms. Every word of a sentence has a number and during development, those numbers are used instead of the words or sentences. Every number has its own language-specific translation. The B2B E-Commerce Portal offers a lot of flexibility by using pages and widgets. The pages and widgets can use standard Exact terms which can be viewed and customized via Modules → System → Terms in Exact Synergy Enterprise.

However, during the implementation of the B2B E-Commerce Portal, you will find out that some terms are not available. In that case, you can create your own B2B E-Commerce Portal terms by clicking **Settings** next to **Define terms** under the **General settings** section.



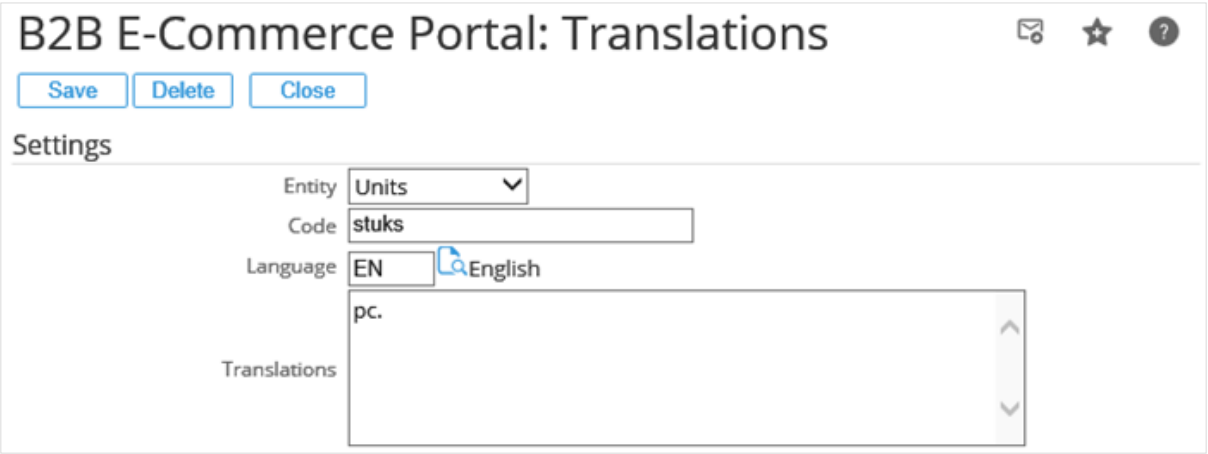
On the **B2B E-Commerce Portal: Term** page, click **New** to create a term for all the languages that were set in the language settings. The term gets a term ID automatically. On the pages and in the widgets, you can refer to this term ID.

Translations settings



The B2B E-Commerce Portal is a multi-language solution. All data will be displayed in the language choice of the visitor or user. Exact Globe Next already offers multiple descriptions for the entities that are mostly used, such as the items, payment conditions, delivery methods, and so on. However, this translation mechanism is not implemented for two important entities that are used in the B2B E-Commerce Portal, namely:

- Units
- Assortments

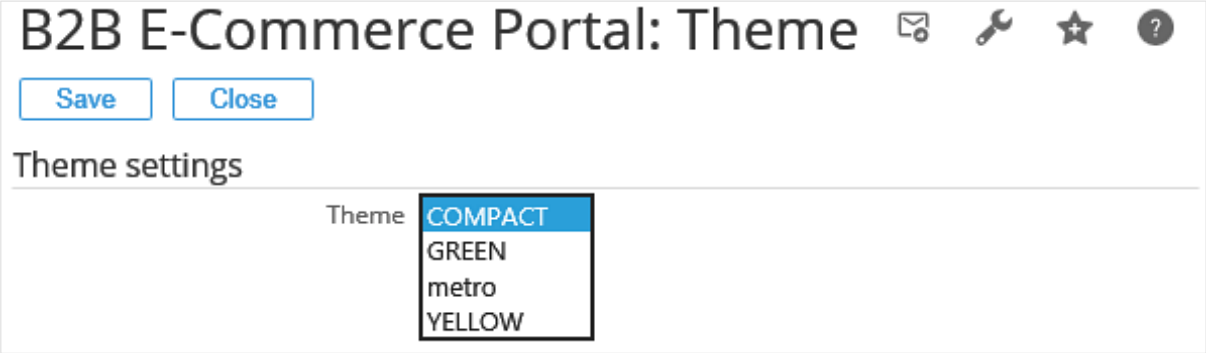


With this translation feature, you can edit the translations for these two entities. If you add or edit a translation, the following data has to be defined under the **Settings** section on the **B2B E-Commerce Portal: Translations** page:

- **Entity:** Select either the **Units** or **Assortments** entity, for which the translations are to be edited.
- **Code:** Type the unit code or assortment code in Exact Globe Next.
- **Language:** Type the required language or select the language from the list of languages.
- **Translations:** Type the unit or assortment in the selected language for the B2B E-Commerce Portal.

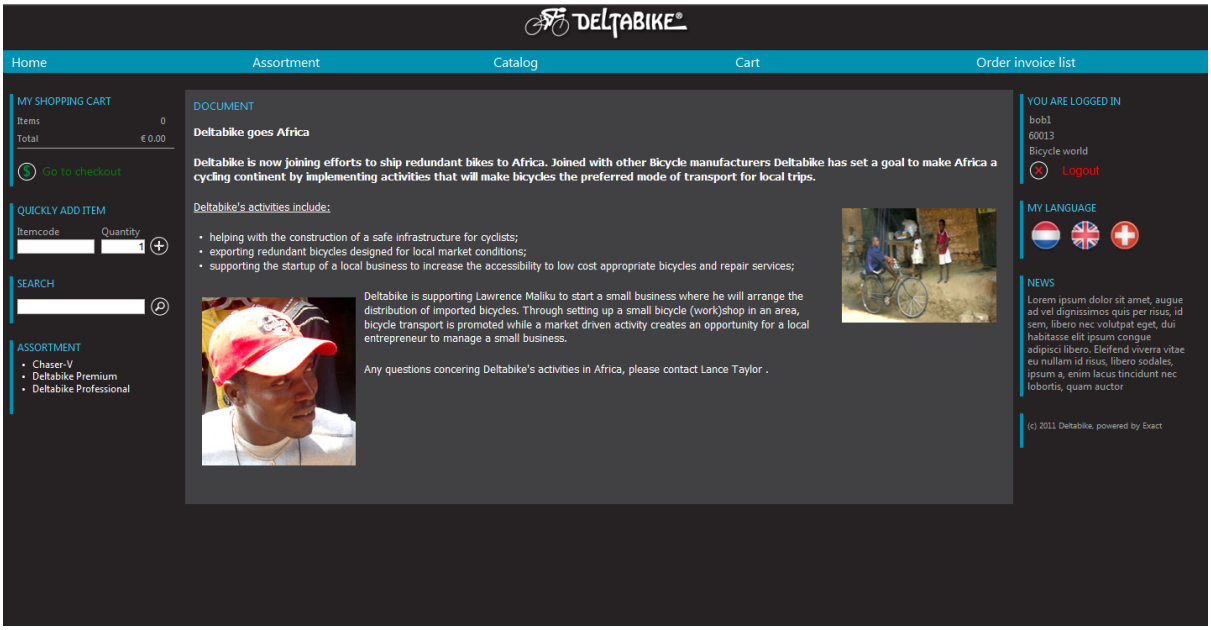
Themes settings

The B2B E-Commerce Portal comes with four standard themes. You can select a theme on this page.



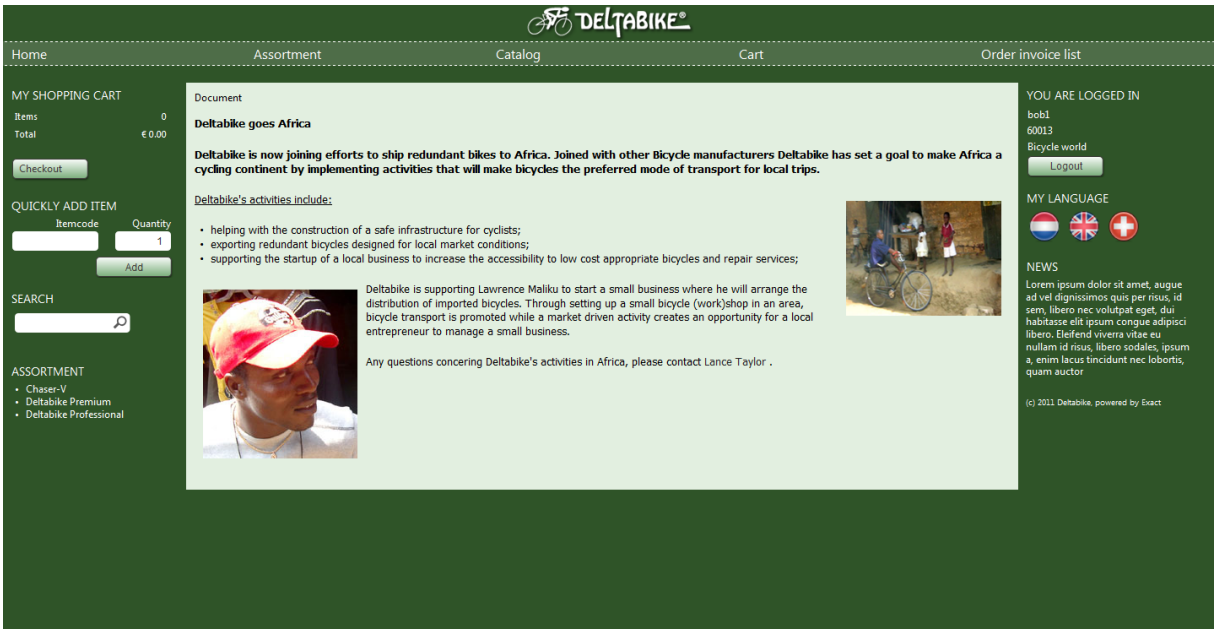
Here, you see examples of the standard themes and customized themes (if any). They have the same widget settings.

Metro theme

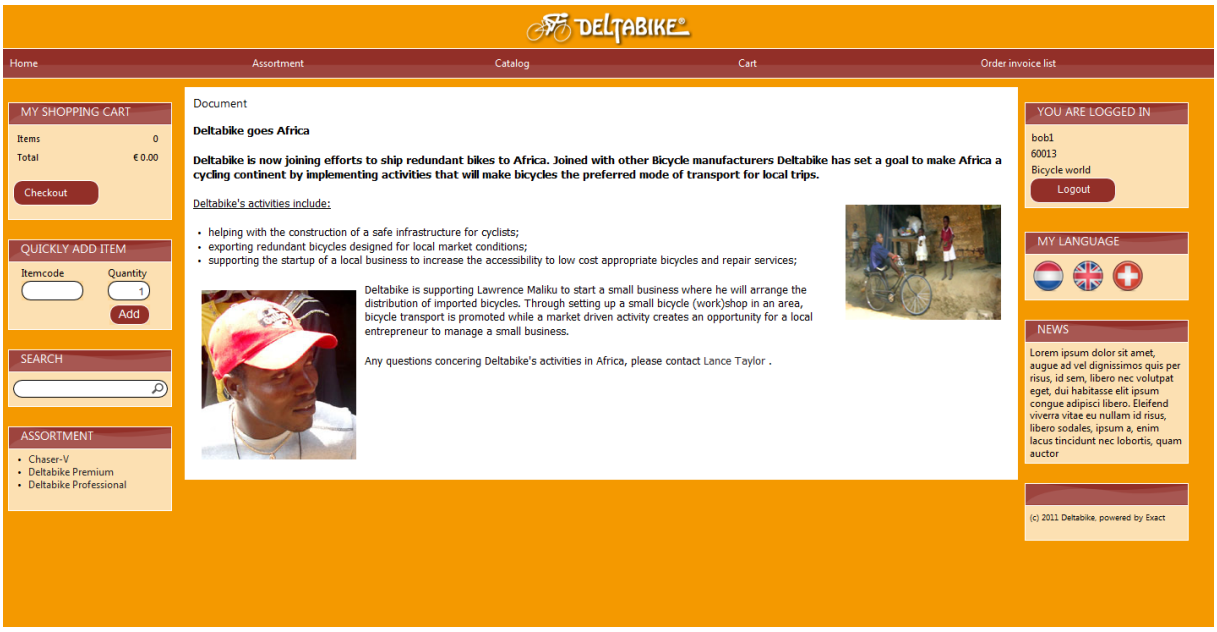


Compact theme

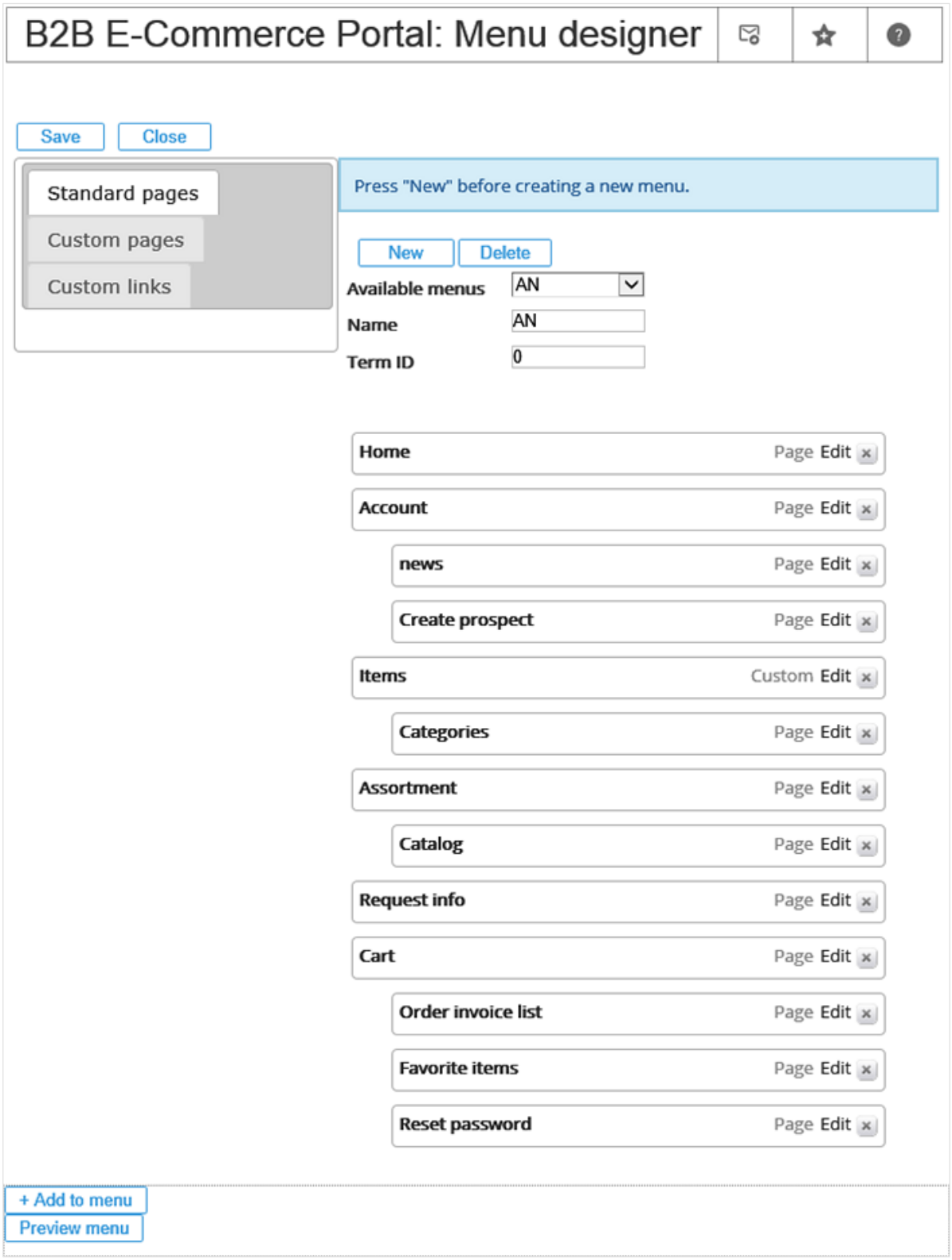
Green theme



Yellow theme



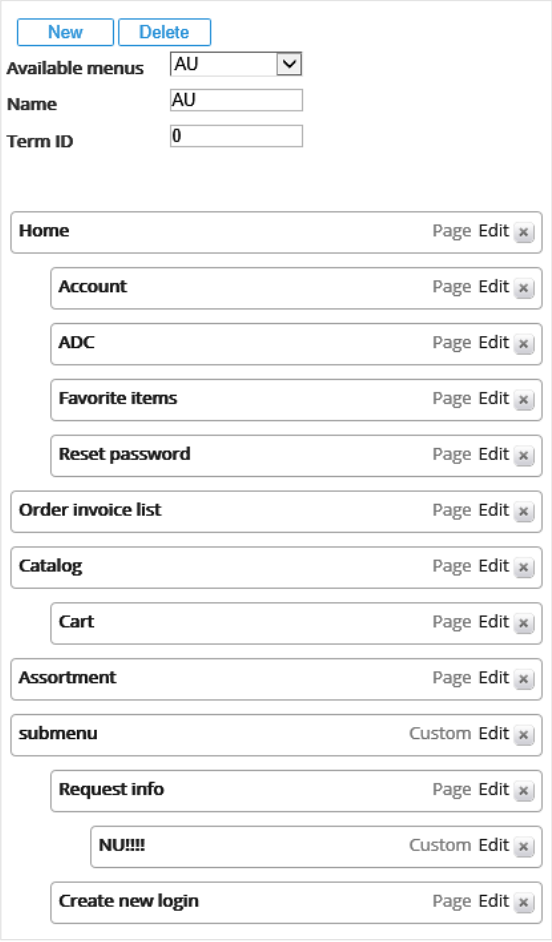
Menus settings



The B2B E-Commerce Portal gives the ECP administrator the possibility to create own menus by clicking **New**. You can select which existing menus to work on at **Available menus** by clicking from the drop-down list. The menus can be linked to the **Menu** widget. For each menu, you can add the following pages and links in the **Standard pages** tab, **Custom pages** tab, and **Custom links** tab, which are displayed on the left of the **B2B E-Commerce Portal: Menu designer** page.

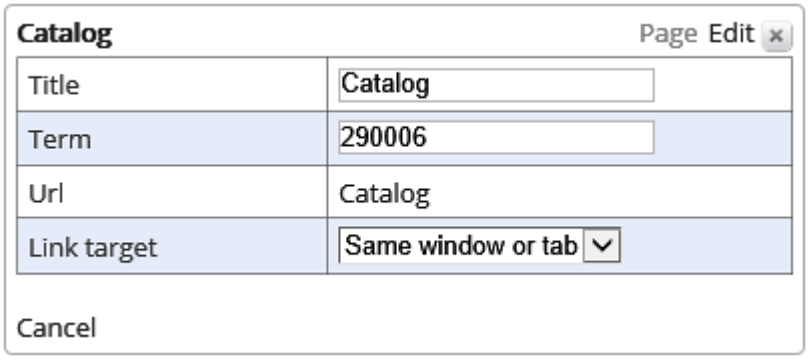
- **Standard pages:** In this tab, the list of standard pages that can be used in a menu are displayed. Select the pages, and then click **+ Add to menu**. The menu entries will be created in the menu on the right side of the page.
- **Custom pages:** In this tab, the list of custom pages that can be used in a menu are displayed if you have created any custom pages by clicking **New** at the bottom of the **B2B E-Commerce Portal: Menu** page. They are divided into **Anonymous** and **Authenticated**, just like the B2B E-Commerce Portal settings page. Select the check box next to the required pages, and then click **+ Add to menu**. The menu entries will be created in the menu on the right side of the page.
- **Custom links:** In this tab, you can either create menu entries that link to other websites or create blank menu entries. For instance, a main menu with sub-menus. By defining the **URL** and **Title** fields, and then clicking **+ Add to menu**, the menu entries will be created in the menu on the right side of the page.

Once the menu entries are available on the right side of the page, you can drag and drop them in the right sequence. You can also use levels by dragging menu entries to the right, as shown in the following:

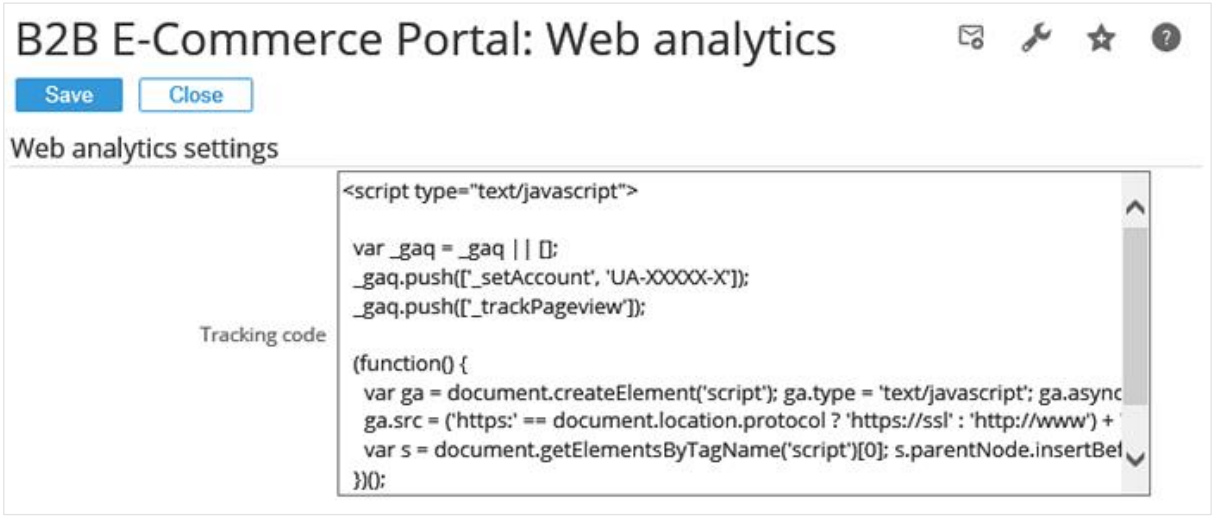


Click **Preview menu** to get an idea of how the menu will look on the B2B E-Commerce Portal.

Since the B2B E-Commerce Portal is a multi-language solution, this also applies to the menus. If you edit a menu entry, you can set the **Term** (which refers to the term ID) of the menu entry, as shown in the following:

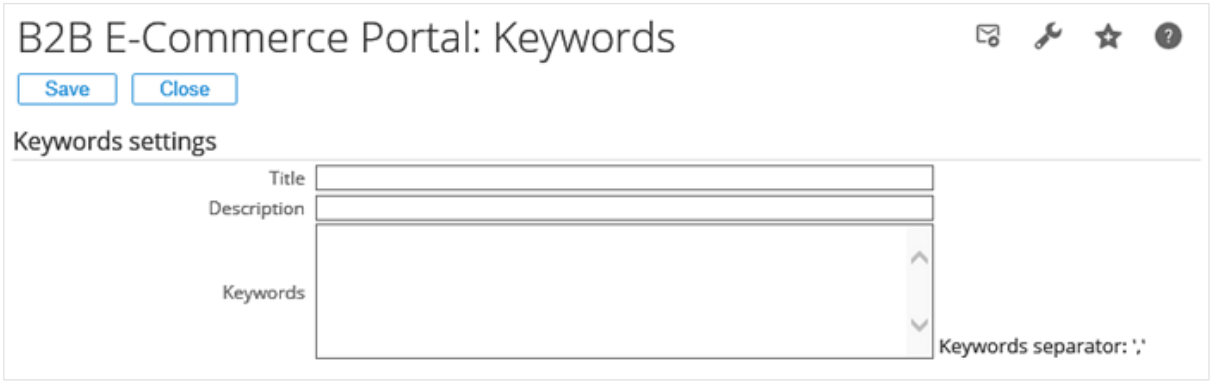


Web analytics settings



With this feature, you can type a script for the Google Analytics tracking codes. For more information on this script, see *Tracking Site Activity* at http://code.google.com/intl/nl-NL/apis/analytics/docs/tracking/asyncTracking.html

Keywords settings



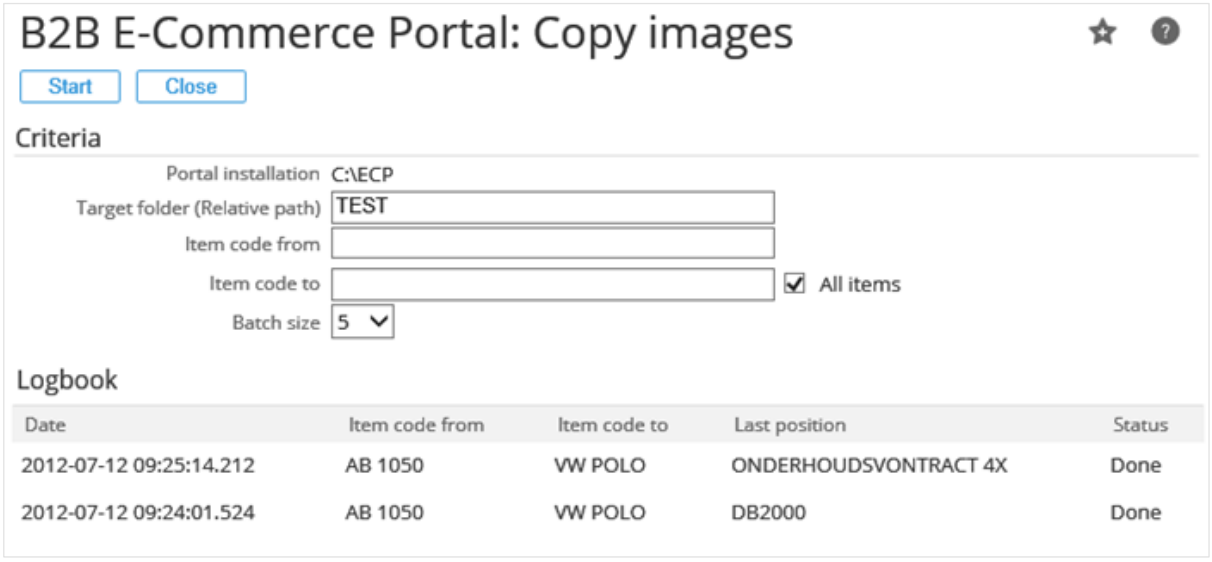
With this feature, you can store keywords, titles, and descriptions for your ECP portals. Your ECP portals can be found by the search engines such as Yahoo, Google, and others when users search online for the information that matches the one defined in your ECP portals. For more information, see *Chapter 11 Search Engine Optimization (SEO)*.

The title that you have defined at **Title** will be displayed on the results page of the search engine along with the description. The description should be a short and clear explanation of what the portal is about. The keywords are usually the important phrases which associate with the information or the content of the portal. Separate the keywords using commas (“,”) if more than one keyword is present.

The system will only recognize alphanumeric values for all the following fields and discard the presence of any special characters, such as <, >, ?, @, !, #, $, %, and *, for processing.

Item images settings

With this feature, you can display items with images on the B2B E-Commerce Portal. To improve performance of displaying the item images on the B2B E-Commerce Portal, you are advised against using the item images from Exact Globe Next, but you should store them on the hard drive of your portal server instead. If you already have the entire bulk of item images stored in Exact Globe Next, this feature can help you to create an environment for the images on the hard drive automatically instead of doing this manually, which can be time consuming.



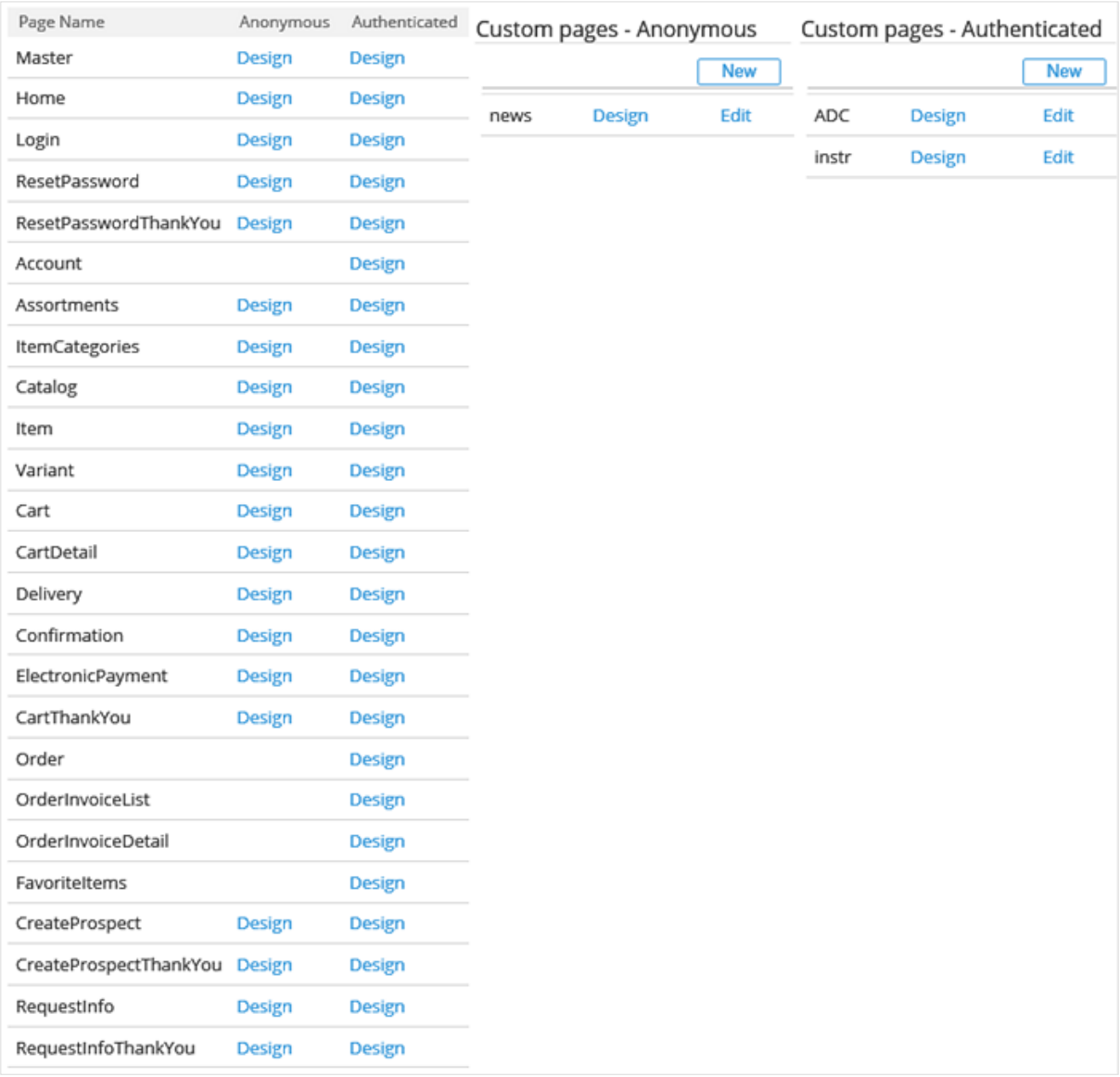
To create the images environment, the following data has to be defined under the **Criteria** section on the **B2B E-Commerce Portal: Copy images** page:

- **Portal installation:** This field displays the installation directory path of the B2B E-Commerce Portal.
- **Target folder (Relative path):** Type the sub-directory of the portal directory path where you want to create the images environment.
- **Item code from:** Type the first item code in the selection range if you are copying more than one image to the environment.
- **Item code to:** Type the last item code in the selection range if you are copying more than one image to the environment. Otherwise, select the **All items** check box to copy all the images.
- **Batch size:** Select **1**, **5**, or **10** for the batch size.

Creating the environment is a background process. The progress per batch (size) is displayed under the **Logbook** section at the bottom of the page.

4.3 PAGES AND WIDGETS

The **B2B E-Commerce Portal: Menu** page provides the ECP administrator the flexibility in setting up the look and feel of the portal. The administrator can decide what is displayed or not displayed on the page for visitors or users of the B2B E-Commerce Portal. This can be easily managed by using the pages and widgets functionalities which are available at the bottom of the **B2B E-Commerce Portal: Menu** page, as shown in the following:



In this section, you will learn what are the pages and widgets available and get familiarized with the terms and descriptions of the settings. For more information on how to apply the pages and widgets to your portals, see *4.4 Practical Guide to Pages and Widgets in B2B E-Commerce Portals*.

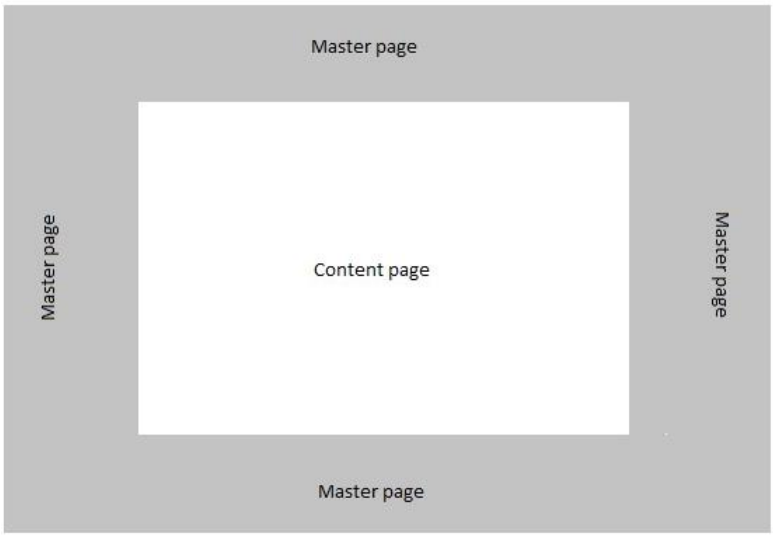
A set of pages and widgets can be configured by the ECP administrator for two scenarios:

- **Anonymous** (displayed for the B2B E-Commerce Portal visitors that have not logged in)
- **Authenticated** (only displayed for users, such as customers, resellers, or employees that have logged in)

The reason for providing two sets of configuration is that an authenticated user will have more options available on the B2B E-Commerce Portal, such as favorites, order invoice lists, et cetera. Also, the positioning of those options and the look and feel (presentation) of the options might be different.

4.3.1 Master page

The **Master** page contains the layout for the top, bottom, left, and right columns of a B2B E-Commerce Portal. Within the **Master** page, content pages are displayed in the center of the **Master** page.

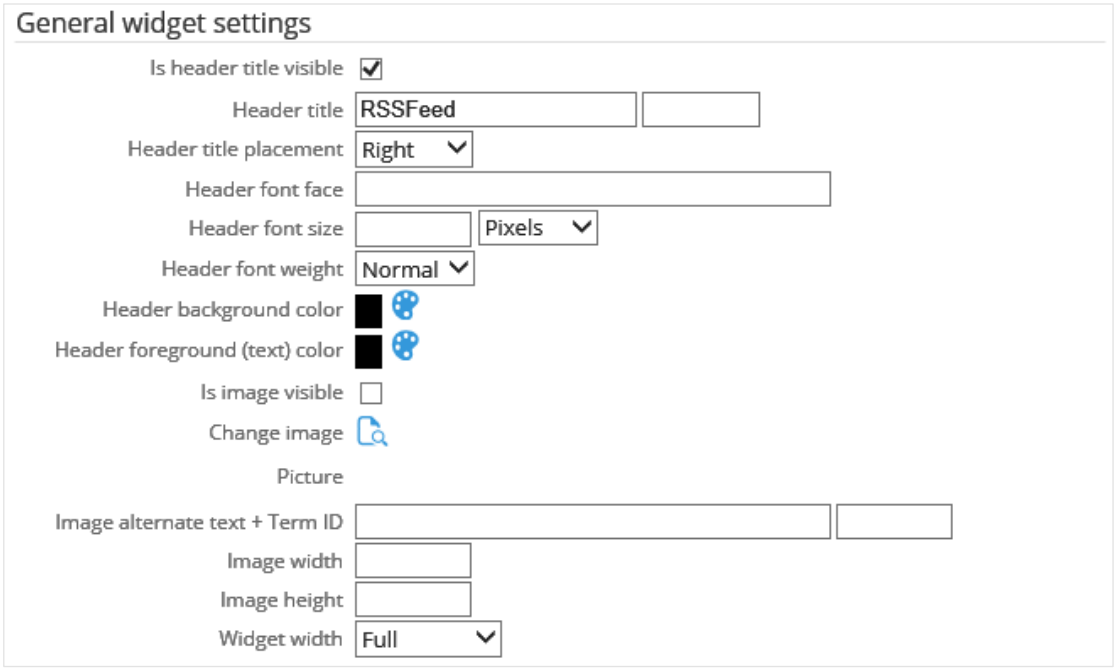


On the **Master** page, a number of widgets (or known as the master page widgets) can be placed. Widgets represent applications that can be easily installed and executed within a page. They can be dragged and dropped anywhere in the B2B E-Commerce Portal, and after that the ECP administrator can configure them. It is also possible to enable and disable them.

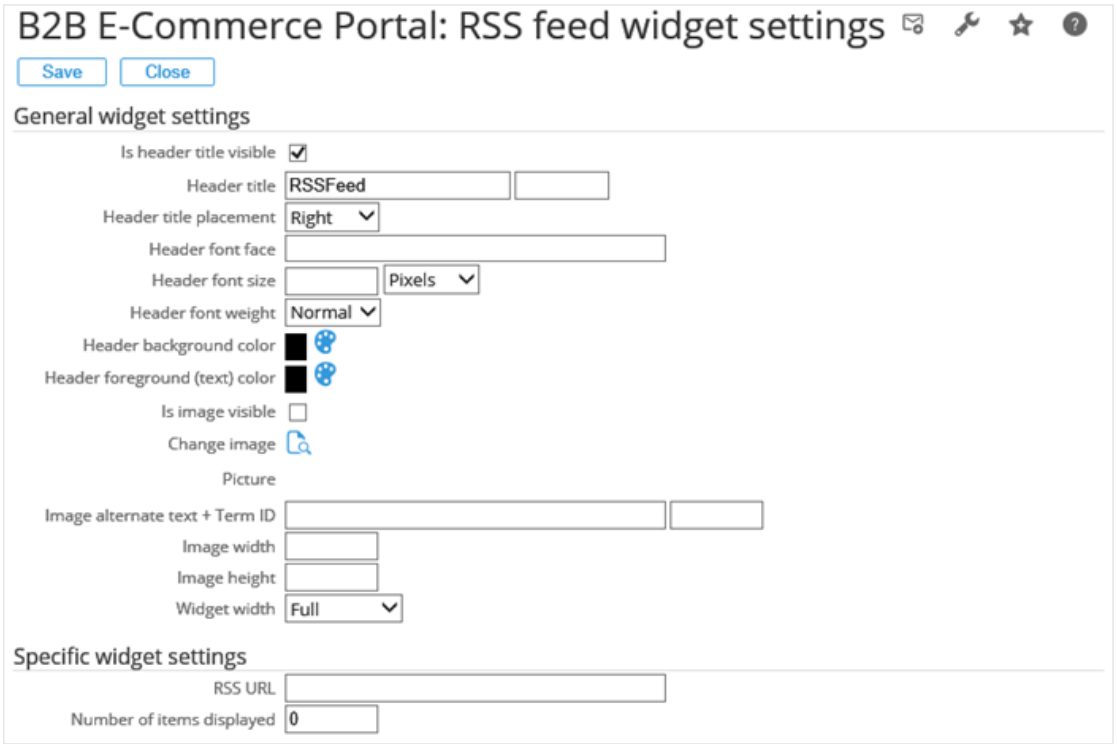
The following widgets are available on the **Master** page:

- Advanced search
- Assortments
- Cart
- Image
- Item categories
- Item Categories (Text)
- Item quick entry
- Language
- Login
- Menu
- RSS feed
- Search
- Text

For each widget, the general properties can be configured for customization, as shown in the following example:

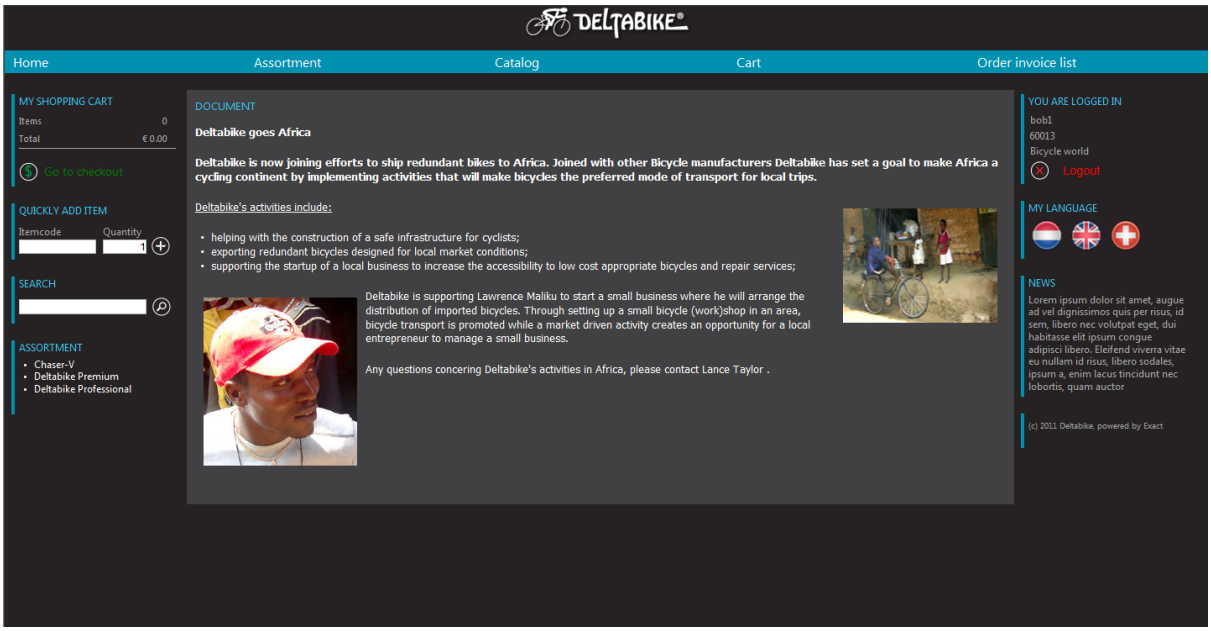


Besides the general widget settings, some widgets may contain specific settings which can also be configured. For instance, the text for the **Text** widget, or the URL for the **RSS feed** widget, as shown in the following:



For more information on the widgets and detailed descriptions, see *4.3.4 Widgets* and *4.3.5 Widgets in detail*.

The following is an example of a **Master** page containing widgets. Each block is a separate widget. The **Document** widget is displayed in the center of the **Master** page.



4.3.2 Content pages

All content pages are displayed in the center of the **Master** page. Just like the **Master** page, it is possible to create a different set of content pages (including the look and feel) for authenticated (logged in) visitors or users and another set of content pages for anonymous (not logged in) visitors or users of the B2B E-Commerce Portal.

There are two different kinds of content pages:

- Process-specific page
- Custom page

The process-specific page is the minimum set of pages that is needed for the B2B E-Commerce Portal to function correctly. These pages are pre-defined and can contain data from Exact Globe Next and data specifically for the B2B E-Commerce Portal. The ECP administrator can set up what to display and where to display the data.

Custom pages can be added by the ECP administrator. They can be different for authenticated and anonymous visitors or users. On a custom page, it is possible to display text, images, documents (from Exact Synergy Enterprise), and news (from Exact Synergy Enterprise). The custom pages can be accessed by the B2B E-Commerce Portal visitors or users via the (customizable) menu or links from other B2B E-Commerce Portal pages.

The following process-specific pages are available for the B2B E-Commerce Portal visitors or users. Some of the pages can be accessed only by authenticated visitors or users, as indicated in the following:

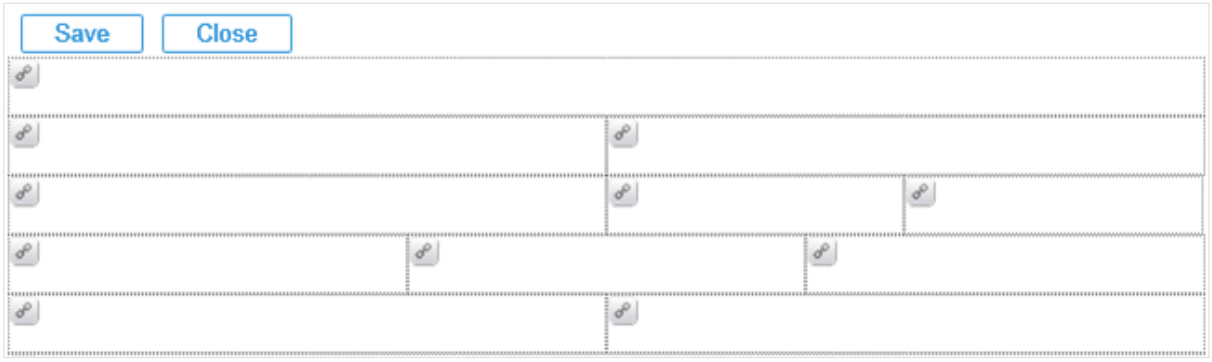
- Home
- Login
- ResetPassword
- ResetPasswordThankYou
- Account (Authenticated)
- Assortments
- AssortmentCard
- ItemCategories
- ItemCategories-ItemCategoryCard
- Catalog
- CatalogItem
- Item
- Variant
- Cart
- CartDetail
- Delivery
- Confirmation
- ElectronicPayment
- CartThankYou
- Order (Authenticated)
- OrderInvoiceList (Authenticated)
- OrderInvoiceDetail (Authenticated)
- FavoriteItems (Authenticated)
- CreateProspect
- CreateProspectThankYou
- RequestInfo
- RequestInfoThankYou

For more information on each content page, see *4.3.3 Content pages in detail*.

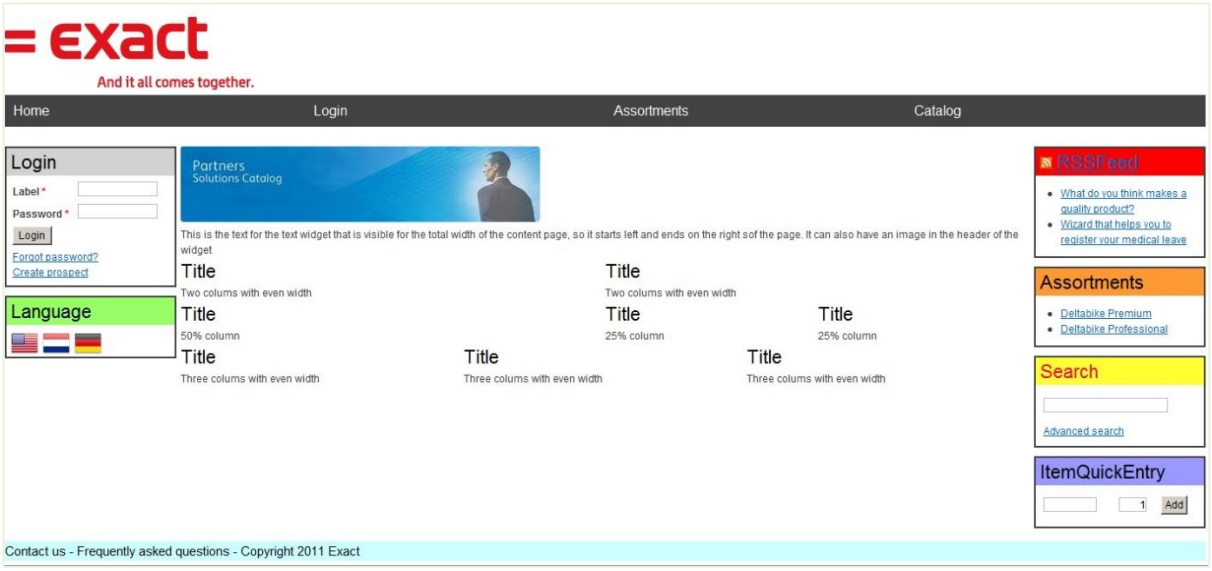
On the content pages, a number of content page widgets can be added. The ECP administrator can choose where to position the widget from the following:

- The full width of the content page.
- Two columns (with even width).
- Three columns (with even width).
- Three columns (one 50% column and two 25% columns).

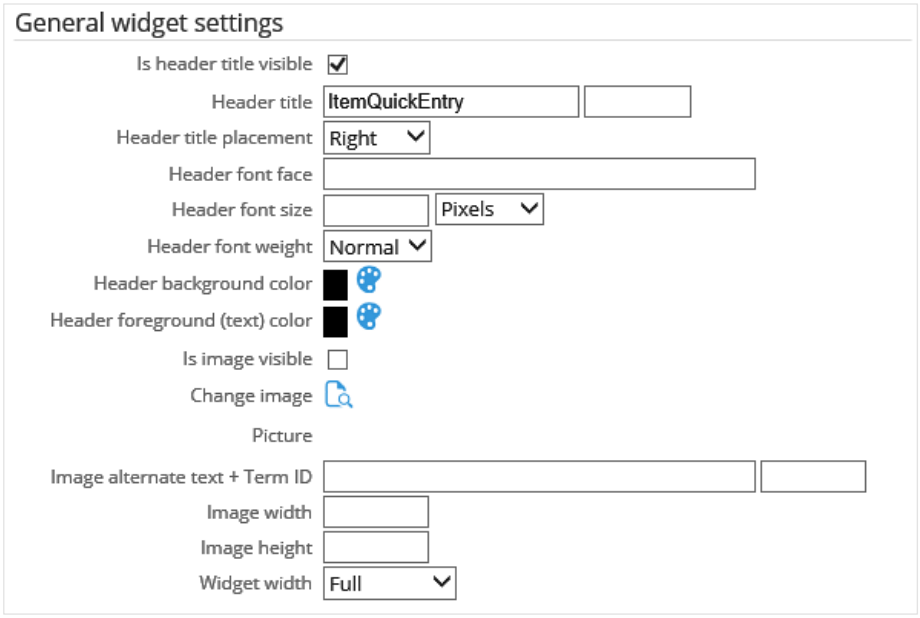
It is possible to create a combination of these settings. The following is an example of an empty content page in the edit mode:



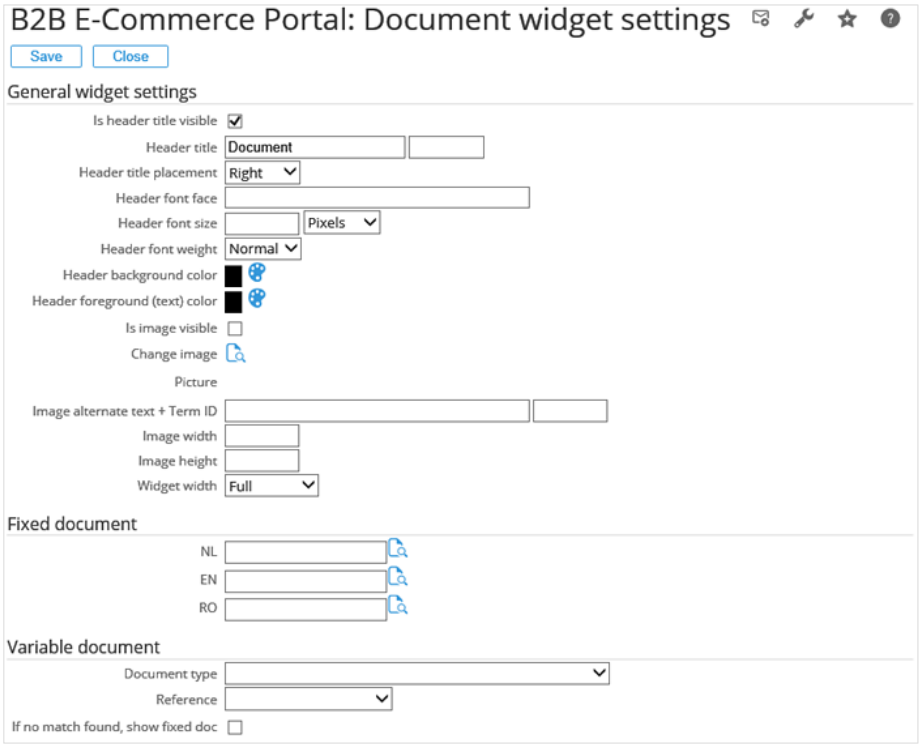
The following is an example of a content page (without a theme) containing only text widgets:



For each widget on the content page, the following properties can be configured, as shown in the following:



Besides these general settings, some widgets may contain specific settings which can also be configured. For instance, the text for the **Text** widget, or the Exact Synergy document for a **Document** widget, as shown in the following:



For more information on the widgets and detailed descriptions, see *4.3.4 Widgets* and *4.3.5 Widgets in detail*.

4.3.3 Content pages in detail

The objective of this section is to describe each content page in detail, such as the function of each page, how can it be accessed, and the list of all widgets available on each page. For more information on the widgets and detailed descriptions, see *4.3.4 Widgets* and *4.3.5 Widgets in detail*.

Home page

The **Home** page is the first content page that is displayed when the visitor or user opens the B2B E-Commerce Portal. This page can be used to display, for instance a welcome message, news, or a special offer.

This page can be accessed via the following:

- Automatically, whenever the B2B E-Commerce Portal URL is opened.
- The menu, usually at the top of the page depending on how the designer designed the portal.

Available widgets on this page:

- Breadcrumb
- Document
- Image
- News
- Tab
- Text

Login page

This page is displayed when incorrect login information is typed in the **Login** widget on the **Master** page or when the **Login** option is selected from the menu.

This page can be accessed via the following:

- The **Login** widget on the **Master** page
- The menu

Available widgets on this page:

- Breadcrumb
- Document
- Login
- Text

ResetPassword page

This page can be accessed whenever a reset or change of the password (from a visitor's perspective) is needed. You will need to access this page if you have forgotten the password (if not logged in) or if the visitor or user needs to change or reset a password.

This page can be accessed via the following:

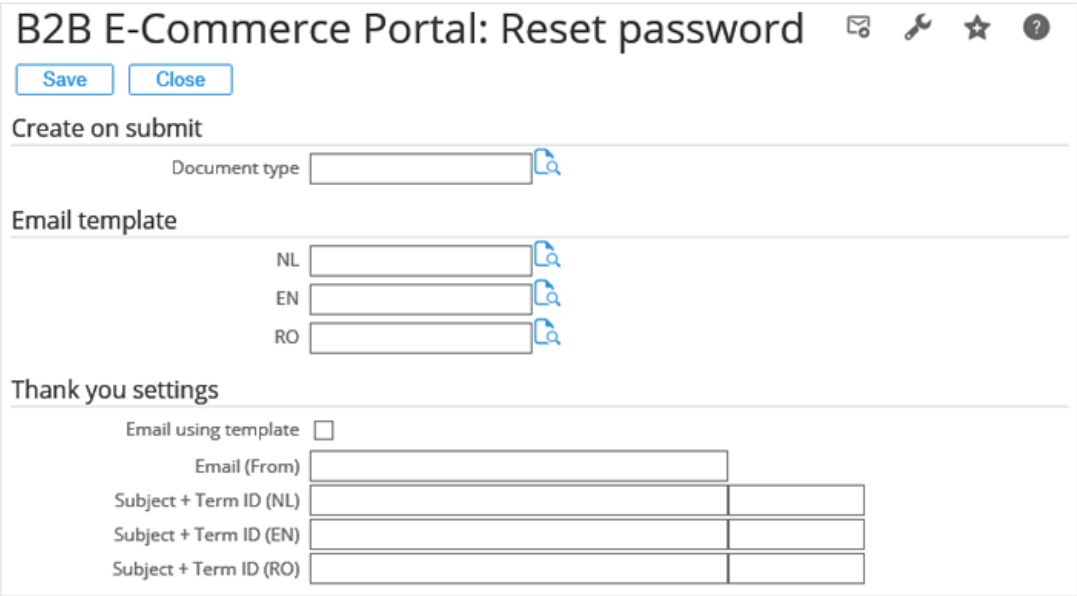
- The **Login** widget on the **Master** page
- The menu

Available widgets on this page:

- Breadcrumb
- Document
- Reset password
- Submit
- Text

Besides the possibility to add and position widgets on the **ResetPassword** page, certain specific page settings can also be configured here.

On the **ResetPassword** page, click **Page settings**. The **B2B E-Commerce Portal: Reset password** page will be displayed, as shown in the following:



- At **Document type** under the **Create on submit** section, type or select the document type created (and merged with the request data) in Exact Synergy Enterprise.
- Under the **Email template** section, type or select a merge document to be linked to each selected language field.
- Under the **Thank you settings** section, select the **Email using template** check box to enable the merge document to be mailed to the account, using the standard Exact Synergy Enterprise mail functionality (either the mail merge functionality or the **Word Merge** functionality).
- At **Email (From)**, type the e-mail address of the sender.
- At **Subject + Term ID**, type the subject and term ID for each selected language. This information is mandatory.

For more information on the list of merge codes that can be used in the merge document that is mailed automatically to the visitors or users, see *Chapter 9 Merging Codes*.

ResetPasswordThankYou page

After the **ResetPassword** page is submitted, a response message can be displayed on the **ResetPasswordThankYou** page.

This page can be accessed via the following:

- The **Login** widget on the **Master** page
- The menu

Available widgets on this page:

- Breadcrumb
- Document
- Text

Assortments page

The **Assortments** page displays the assortments which are maintained in Exact Globe Next. It is possible to display an image per assortment and sub-assortment, and to decide what assortments will or will not be displayed on this page. The number of assortments displayed per page can be defined.

This page can be accessed via the following:

- The **Assortments** widget on the **Master** page
- The menu

Available widgets on this page:

- Assortments details
- Breadcrumb
- Document
- Text

AssortmentCard page

The **AssortmentCard** page can be accessed if you have selected the **Click here to define the layout of the assortment card** hyperlink in the **Assortments details** widget on the **Assortments** page. This does not open a new page per assortment, but it will display the details on the **Assortments** page.

This page can be accessed via the following:

- The **Assortments details** widget on the **Assortments** page

Available widgets on this page:

- Document
- Image gallery
- Number of items
- Text
- Title (or AssortmentTitle)

ItemCategories page

The **ItemCategories** page displays the item categories which are maintained in Exact Synergy Enterprise. It is possible to display an image per category on this page. The number of categories displayed per page can be defined.

This page can be accessed via the following:

- The **Item categories** (or **ItemCategoriesDetails**) widget on the **Master** page
- The menu

Available widgets on this page:

- Breadcrumb
- Document
- Item categories (or ItemCategoriesDetails)
- Text

ItemCategories-ItemCategoryCard page

On the **ItemCategories** page, the **Item categories** (or **ItemCategoriesDetails**) widget can be placed. You can access the **ItemCategories-ItemCategoryCard** page by selecting the **Click here to define the layout of the item category card** hyperlink in the **Item categories** widget on the **Item Categories** page. This does not open a new page per item category, but it will display the details on the **ItemCategories** page.

This page can be accessed via the following:

- The **ItemCategories** page

Available widgets on this page:

- Document
- Image gallery
- Number of items
- Text
- Title (or ItemCategoryTitle)

Catalog page

The **Catalog** page displays a number of items with selected item fields and/or widgets which are maintained via the **CatalogItem** page. The number of rows and columns can be defined by the ECP administrator.

This page can be accessed via the following:

- The menu
- The **Advanced search** widget
- The **Assortments** widget or **Assortments** page

Available widgets on this page:

- Advanced search
- Assortment Image gallery
- Assortments
- Breadcrumb
- Catalog
- Item Category Image gallery
- Items most sold items
- Text

CatalogItem page

The **CatalogItem** page displays item information and/or widgets per item on the **Catalog** page. You can access this page if you have selected the **Click here to define the layout of the items as seen in the catalog** hyperlink in the **Catalog** widget on the **Catalog** page.

This page can be accessed via the following:

- The **Catalog** page

Available widgets on this page:

- Document
- Instruction line
- Item add to cart
- Item add to favorites (Authenticated)
- Item fields
- Item image gallery
- Item name
- Item Net price
- Item price list (Authenticated)
- Item Sales price
- Item stock

Item page

The **Item** page displays detailed information for one selected item.

This page can be accessed via the following:

- The **Catalog** page
- The **Confirmation** page
- The (Saved) **Carts** page
- The **Order** page
- The **FavoriteItems** page
- The **OrderInvoiceList** page

Available widgets on this page:

- Document
- Instruction line
- Item add to cart
- Item add to favorites (Authenticated)
- Item fields
- Item image gallery
- Item most sold items
- Item name
- Item Net price
- Item other people also bought
- Item price list (Authenticated)
- Item Sales price
- Item stock
- Mandatory items
- Optional items
- Related documents
- Related items
- Tab

Account page (Authenticated)

On the **Account** page, an authenticated visitor or user can see various account-specific data, such as related documents and saved carts. If the visitor or user is a reseller or employee, the visitor or user can impersonate a linked customer from the **Account** page.

This page can be accessed via the following:

- The menu

Available widgets on this page:

- Address
- Breadcrumb
- Customer data
- Document
- Favorite items
- Impersonate customers
- Related documents
- Saved cart list
- Submit
- Text

Variant page

In cases whereby an item that is a variant item in Exact Globe Next, is added to the shopping cart, mandatory and optional items may apply. These items are displayed on a pop-up page nested within this page. After submitting this page, the items will be added to the shopping cart.

This page can be accessed via the following:

- The **Catalog** page
- The **Item** page
- The **Delivery** page

Available widgets on this page:

- At least one
- Document
- Image
- Item name
- Mandatory items
- One of set
- One or none
- Optional items
- Text

Cart page

The **Cart** page displays all the items that were added to the cart. Items can also be added on this page. For instance, adding items through importing a Microsoft Excel worksheet. This is the page where the check-out process starts.

This page can be accessed via the following:

- The menu
- The **Cart** widget

Available widgets on this page:

- Breadcrumb
- Cart details
- Document
- Excel import
- Order total
- Saved cart (Authenticated)
- Submit
- Text

CartDetail page

The **CartDetail** page displays all the items in the (saved) cart.

This page can be accessed via the following:

- The **Cart** page

Available widgets on this page:

- Breadcrumb
- Cart details
- Document
- Text

Delivery page

After checking out from the **Cart** page, the **Delivery** page will be displayed, followed by the **Confirmation** page. Authenticated visitors or users with the check-out right can change specific delivery information before the final check-out.

This page can be accessed via the following:

- The **Cart** page

Available widgets on this page:

- Address (Authenticated)
- Breadcrumb
- Cart details
- Create prospect
- Customer data
- Delivery date
- Delivery method
- Document
- Image
- Payment method (Authenticated)
- Remarks
- Sales order reference
- Shipment cost
- Submit
- Text

Confirmation page

Once the data has been defined or confirmed and submitted on the **Delivery** page, the **Confirmation** page will be displayed. This is the last page before a sales order is created in Exact Globe Next.

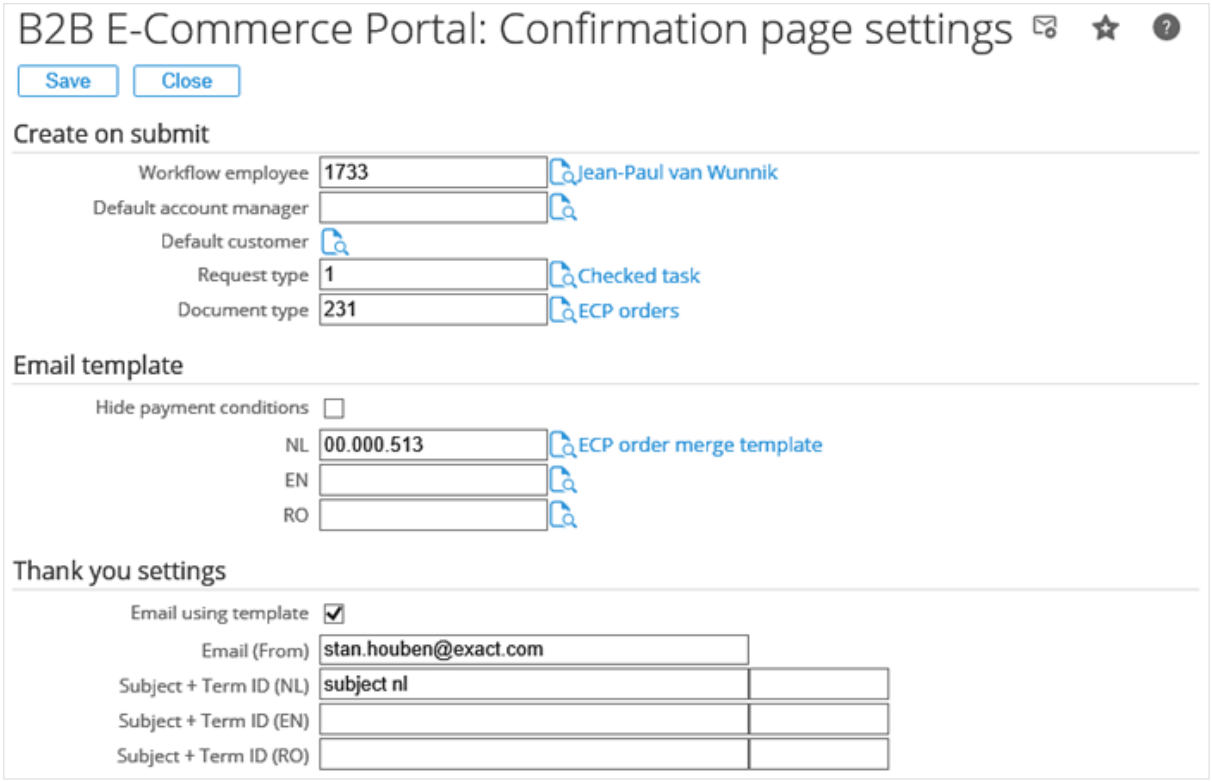
This page can be accessed via the following:

- The **Delivery** page

Available widgets on this page:

- Address (Authenticated)
- Breadcrumb
- Cart details
- Create prospect (Anonymous)
- Customer data
- Delivery date
- Delivery method
- Document
- Image
- Invoice to (this widget is no longer supported from product update 251 onwards)
- Order total
- Payment method
- Remarks
- Sales order reference
- Submit
- Terms and conditions
- Text

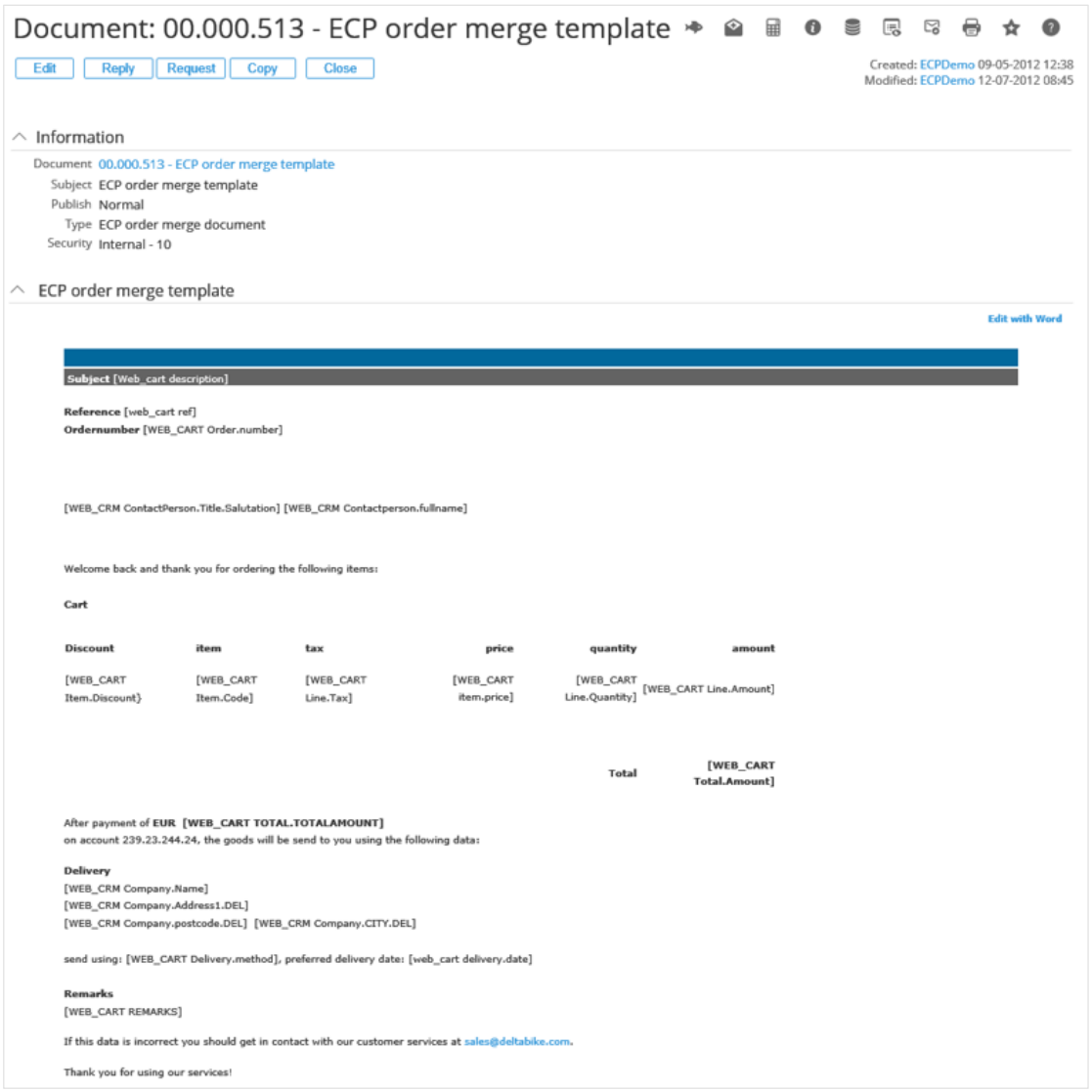
Besides the possibility to add and position widgets on this **Confirmation** page, you can also configure the page settings by clicking **Page settings**. The **B2B E-Commerce Portal: Confirmation page settings** page will be displayed, as shown in the following:



- At **Workflow employee** under the **Create on submit** section, type or select the employee who will be receiving the request. If this field is left blank, the request will be in the workflow of the account manager of the authenticated visitor or user.
- At **Default account manager**, type or select the default account manager for future use when ordering as an anonymous visitor or user.
- At **Default customer**, select the default customer for future use when ordering as an anonymous visitor or user.
- At **Request type**, type or select the request type which will be created in Exact Synergy Enterprise once the cart is submitted.
- At **Document type**, type or select the document type which will be created (and merged with the cart data) in Exact Synergy Enterprise once the cart is submitted.
- Under the **Email template** section, select the **Hide payment conditions** check box to hide the payment conditions from the merge document.
- Under the **Thank you settings** section, select the **Email using template** check box to enable the merge document to be mailed to the account, using the standard Exact Synergy Enterprise mail functionality (either the mail merge functionality or the **Word Merge** functionality).
- At **Email (From)**, type the e-mail address of the sender.
- At **Subject + Term ID**, type the subject and term ID for each selected language. This information is mandatory.

For more information on the list of merge codes that can be used in the merge document that is mailed automatically to the visitors or users, see *Chapter 9 Merging Codes*.

The following is an example of a merge document for a web order.



Document: 00.000.513 - ECP order merge template

Edit | Reply | Request | Copy | Close

Created: ECPDemo 09-05-2012 12:38
Modified: ECPDemo 12-07-2012 08:45

Information

Document 00.000.513 - ECP order merge template
Subject ECP order merge template
Publish Normal
Type ECP order merge document
Security Internal - 10

ECP order merge template

Edit with Word

Subject [Web_cart description]

Reference [web_cart ref]
Ordernumber [WEB_CART Order.number]

[WEB_CRM ContactPerson.Title.Salutation] [WEB_CRM Contactperson.fullname]

Welcome back and thank you for ordering the following items:

Cart

Discount	item	tax	price	quantity	amount
[WEB_CART Item.Discount}	[WEB_CART Item.Code]	[WEB_CART Line.Tax]	[WEB_CART item.price]	[WEB_CART Line.Quantity]	[WEB_CART Line.Amount]

Total **[WEB_CART Total.Amount]**

After payment of **EUR [WEB_CART TOTAL.TOTALAMOUNT]**
on account 239.23.244.24, the goods will be send to you using the following data:

Delivery
[WEB_CRM Company.Name]
[WEB_CRM Company.Address1.DEL]
[WEB_CRM Company.postcode.DEL] [WEB_CRM Company.CITY.DEL]

send using: [WEB_CART Delivery.method], preferred delivery date: [web_cart delivery.date]

Remarks
[WEB_CART REMARKS]

If this data is incorrect you should get in contact with our customer services at sales@deltabike.com.

Thank you for using our services!

Note:
Any remarks included via the Delivery and Confirmation pages by the visitors or users, will be processed and displayed in the Note screen of the sales order in Exact Globe Next. You can access the Notes screen by clicking the Notes (Sales order) icon directly on the tool bar in the Sales order screen via Order → To be processed → Sales orders in Exact Globe Next.

ElectronicPayment page

Once the order is confirmed, and if electronic payment is enabled (**Electronic payment** is selected at **Payment method** on the **Delivery** page), this page will be displayed before the visitor is redirected to the Ogone website for payment.

This page can be accessed via the following:

- The **Confirmation** page

Available widgets on this page:

- Breadcrumb
- Document
- Electronic payment
- Text

CartThankYou page

Once the cart is submitted, a response message can be displayed on the **CartThankYou** page.

This page can be accessed via the following:

- The **Confirmation** page

Available widgets on this page:

- Breadcrumb
- Document
- Text

Order page (Authenticated)

This page provides detailed information about a sales order, back order, or historical order that has been selected from the **OrderInvoiceList** page.

This page can be accessed via the following:

- The **OrderInvoiceList** page

Available widgets on this page:

- Add to cart
- Breadcrumb
- Customer data
- Order
- Order total
- Text

OrdersInvoiceList page (Authenticated)

This page displays data concerning back orders, order history, and invoice history. The columns can be selected by the ECP administrator.

This page can be accessed via the following:

- The menu

Available widgets on this page:

- Breadcrumb
- Document
- Order invoice list
- Text

OrderInvoiceDetail page (Authenticated)

This page provides detailed information on selected invoices from the **OrderInvoiceList** page.

This page can be accessed via the following:

- The **OrderInvoiceList** page

Available widgets on this page:

- Breadcrumb
- Order invoice detail
- Text

FavoriteItems page (Authenticated)

From the **Catalog** page or the **Item** page, it is possible to add an item to the favorite list. As a result, the favorite items are displayed on the **FavoriteItems** page.

This page can be accessed via the following:

- The menu

Available widgets on this page:

- Breadcrumb
- Document
- Favorite items
- Text

CreateProspect page

This page can be used by visitors or users to send a request for a new login. After the visitor or user has submitted the input, which forms a request in Exact Synergy Enterprise, an account and a document (if applicable) will be created. An e-mail can also be sent with the merge document.

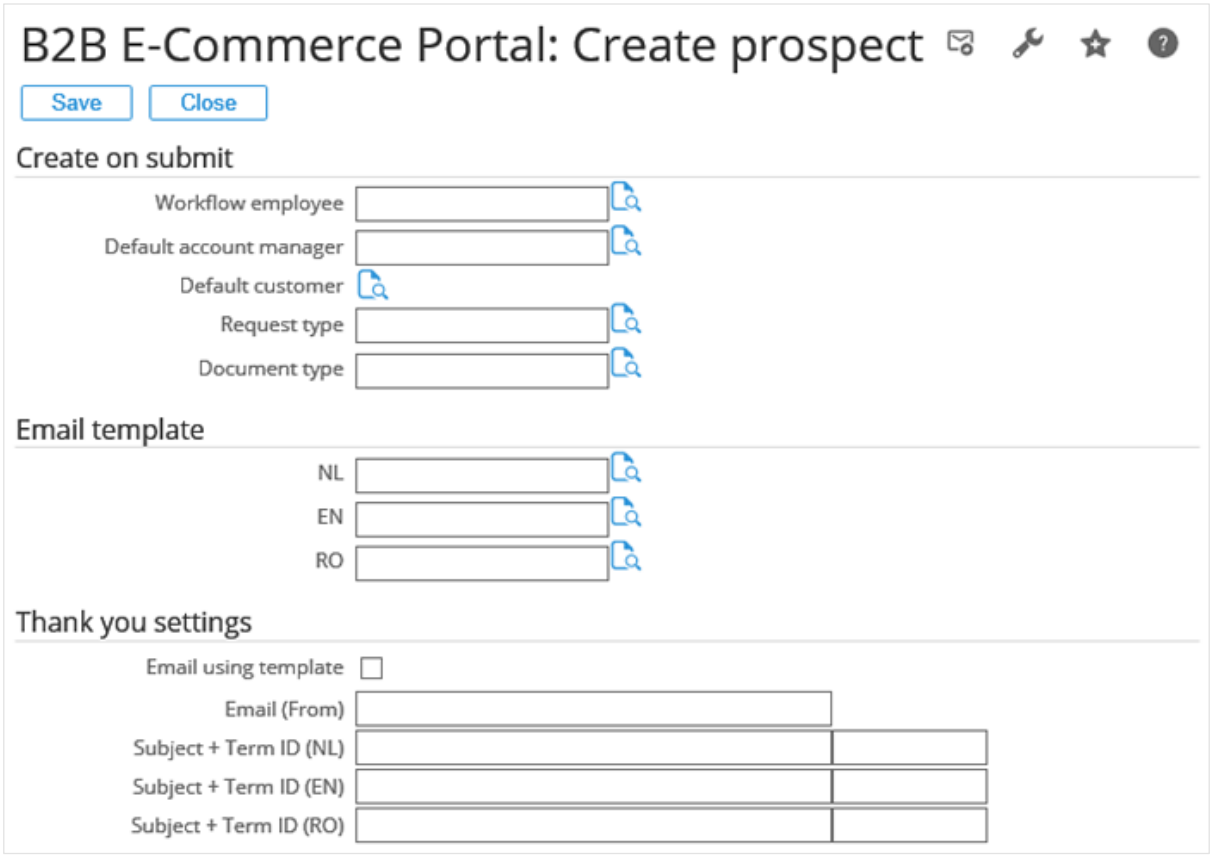
This page can be accessed via the following:

- The **Login** widget
- The menu

Available widgets on this page:

- Breadcrumb
- Create prospect
- Customer data (Authenticated)
- Document
- Text

Besides the possibility to add and position widgets on this **CreateProspect** page, you can also configure the page settings by clicking **Page settings**. The **B2B E-Commerce Portal: Create prospect** page will be displayed, as shown in the following:



- At **Workflow employee** under the **Create on submit** section, type or select the employee who will be receiving the request.
- At **Default account manager**, type or select the default account manager. For non-authenticated visitors or users, this account manager will be linked to the request if the **Workflow employee** field is left blank.
- At **Default customer**, select the default customer to whom the request and document will be linked in Exact Synergy Enterprise, if the request comes from an anonymous visitor.
- At **Request type**, type or select the request type which will be created in Exact Synergy Enterprise once the request is submitted.
- At **Document type**, type or select the document type which will be created (and merged with the request data) in Exact Synergy Enterprise once the request is submitted.
- Under the **Email template** section, select the merge document to be linked at each selected language field.
- Under the **Thank you settings** section, select the **Email using template** check box to enable the merge document to be mailed to the account, using the standard Exact Synergy Enterprise mail functionality (either the mail merge functionality or the **Word Merge** functionality).
- At **Email (From)**, type the e-mail address of the sender.
- At **Subject + Term ID**, type the subject and term ID for each selected language. This information is mandatory.

For more information on the list of merge codes that can be used in the merge document that is mailed automatically to the visitors or users, see *Chapter 9 Merging Codes*.

CreateProspectThankYou page

After submitting the **CreateProspect** page, a response message can be displayed on the **CreateProspectThankYou** page.

This page can be accessed via the following:

- The **CreateProspect** page

Available widgets on this page:

- Breadcrumb
- Document
- Text

RequestInfo page

This page can be used by visitors or users to send a request to the company that is hosting the B2B E-Commerce Portal (that is actually you). Once the visitor or user has submitted the form (or page), a request and a document (if applicable), will be created in Exact Synergy Enterprise.

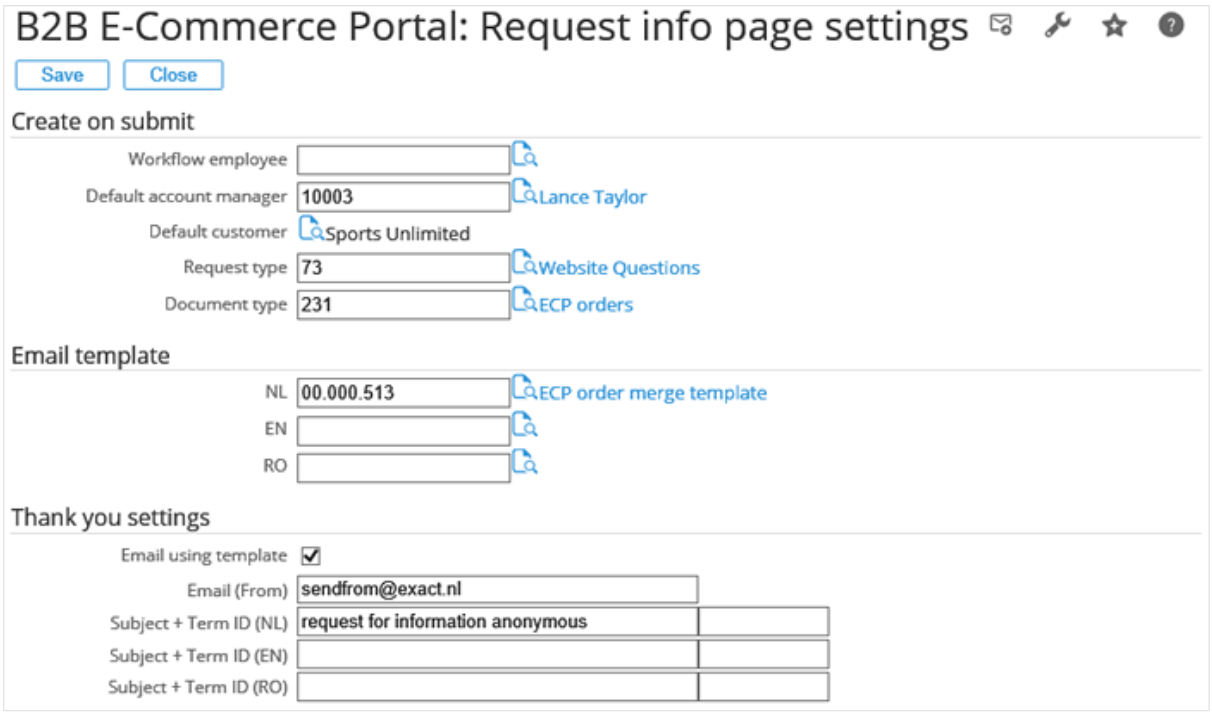
This page can be accessed via the following:

- The menu

Available widgets on this page:

- Address
- Breadcrumb
- Remarks
- Submit
- Text

Besides the possibility to add and position widgets on this page, you can also configure the page settings by clicking **Page settings**. The **B2B E-Commerce Portal: Request info page settings** page will be displayed, as shown in the following:



- At **Workflow employee** under the **Create on submit** section, type or select the employee who will be receiving the request.
- At **Default account manager**, type or select the default account manager. For non-authenticated visitors or users, this account manager will be linked to the request if the **Workflow employee** field is left blank.
- At **Default customer**, select the default customer to whom the request and document will be linked in Exact Synergy Enterprise, if the request comes from an anonymous visitor.
- At **Request type**, type or select the request type which will be created in Exact Synergy Enterprise once the request is submitted.
- At **Document type**, type or select the document type which will be created (and merged with the request data) in Exact Synergy Enterprise once the request is submitted.
- Under the **Email template** section, select the merge document to be linked at each selected language field.
- Under the **Thank you settings** section, select the **Email using template** check box to enable the merge document to be mailed to the account, using the standard Exact Synergy Enterprise mail functionality (either the mail merge functionality or the **Word Merge** functionality).
- At **Email (From)**, type the e-mail address of the sender.
- At **Subject + Term ID**, type the subject and the term ID for each selected language. This information is mandatory.

For more information on the list of merge codes that can be used in the merge document that is mailed automatically to the visitors or users, see *Chapter 9 Merging Codes*.

RequestInfoThankYou page

Once the **RequestInfo** page is submitted, a response message can be displayed on the **RequestInfoThankYou** page.

This page can be accessed via the following:

- The **RequestInfo** page

Available widgets on this page:

- Breadcrumb
- Document
- Text

Custom page

Custom pages can be added by the ECP administrator and they can be different for authenticated and anonymous visitors or users. You can create a custom page for various purposes, as long as you do not need data from Exact Globe Next, and as long as this custom page is not part of the B2B E-Commerce Portal process. For more information on process-specific page, see *4.3.2 Content pages*.

This page can be accessed via the following:

- The menu

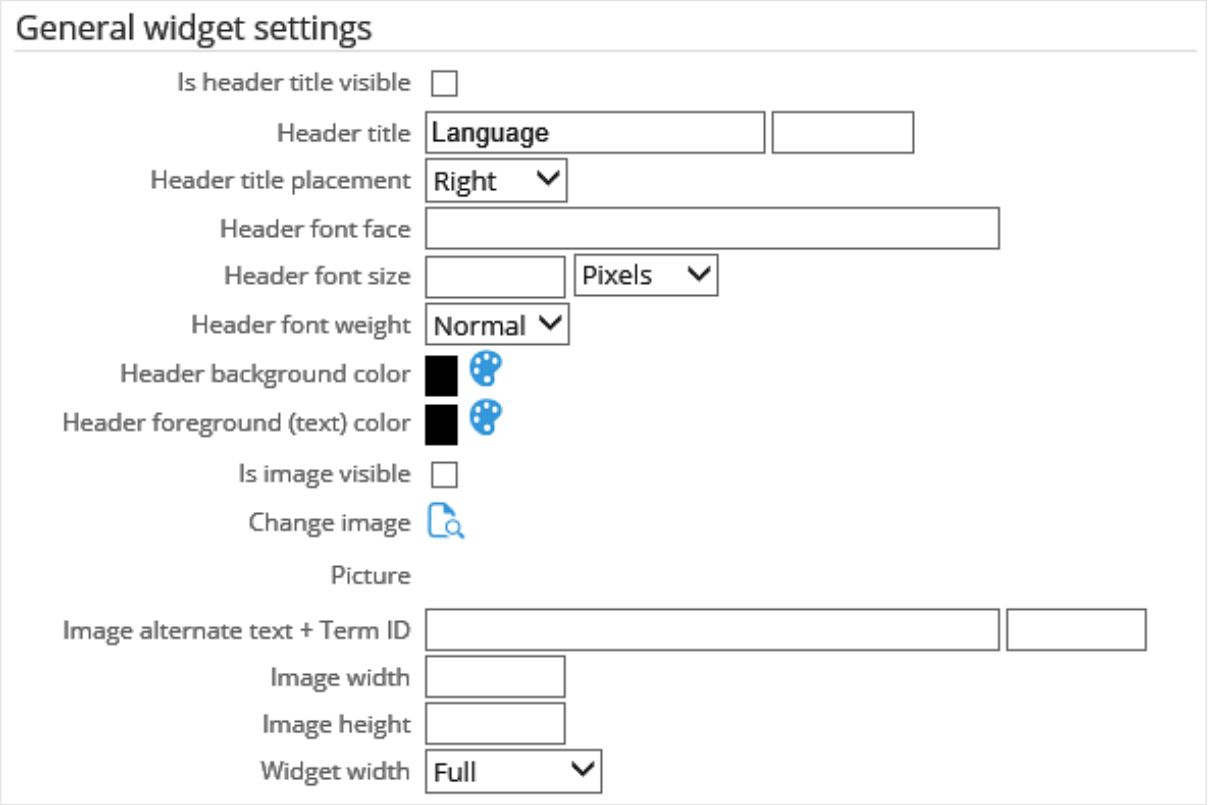
Available widgets on this page:

- Breadcrumb
- Document
- Image
- News
- Text

4.3.4 Widgets

Widgets represent applications that can be easily installed and executed on a page. They can be dragged and dropped anywhere on the B2B E-Commerce Portal. The ECP administrator can then configure them. It is possible to enable and disable the widgets as well.

For most of the widgets, the following general properties can be configured:



To configure widgets:

1. On the content page or **Master** page, click the icon to add a widget, and then the icon to configure the general settings for the widget.
2. Under the **General widget settings** section, select the **Is header title visible** check box to display the header title of the widget.
3. At **Header title**, type a title for the widget. Type the term ID for the header title in the next box. You can use the terms available directly from Exact Synergy Enterprise, or use the terms that are created for this portal specifically.
4. At **Header title placement**, select **Right**, **Left**, **Above**, or **Under** as the position where the header title should be displayed if a picture is selected. For example, if **Under** is selected, the header title will be displayed under the picture.
5. At **Header font face**, type the required font style for the header.
6. At **Header font size**, type a numeric value for the size of the font for the header. You can define the unit of measurement next to the value by selecting **Pixels**, **em**, or **Percent**.
7. Next, at **Header font weight**, select either **Normal** or **Bold** as the font weight of the header. By default, the header is displayed in regular font.
8. At **Header background color**, click the icon to select the background color for the widget.
9. At **Header foreground (text) color**, click the icon to select the text color for the widget.
10. Select the **Is image visible** check box to display the picture (usually a logo) of the widget.
11. Click the icon at **Change image** to select a picture (stored in Exact Synergy Enterprise) of the widget. This picture will be displayed at the **Picture** field.
12. At **Image alternate text + Term ID**, type the alternative text description for the picture of the widget. This text will be displayed when the mouse is hovered over the picture. Type the term ID in the next box.
13. At **Image width**, type the width for the picture of the widget in pixels. If this is left blank, the standard width of the image will be used or the width will be calculated based on the defined height.

14. At **Image height**, type the height for the picture of the widget in pixels. If this is left blank, the standard height of the image will be used or the height will be calculated based on the defined width.
15. At **Widget width**, select one of the available options to display the width of the widget. Select from the following options:

    - **Full** – Select this option whereby the widget will take the full width of the section where it is inserted.
    - **Automatic** – Select this option whereby the width will be set automatically based on the style sheet.
    - **Manual** – Select this option whereby the width will be based on the number of pixels.

Besides these general settings, the specific widget settings can also be defined. Depending on the individual widget, the specific widget settings may differ from one to another.

4.3.5 Widgets in detail

Add to cart widget

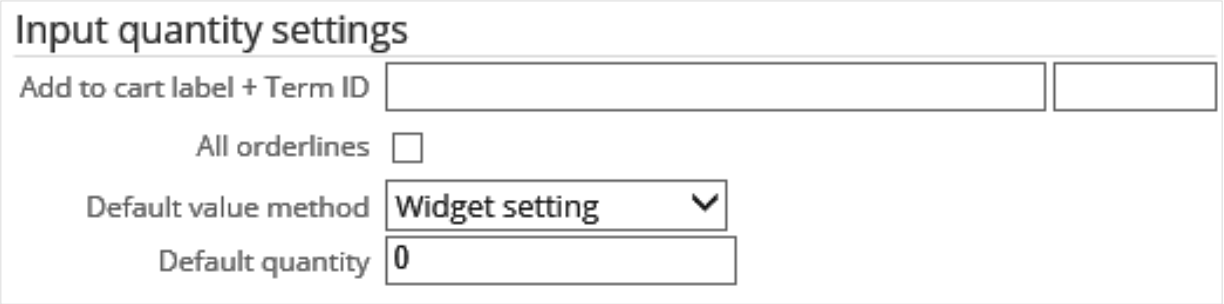
The **Add to cart** (or **OrderAddToCart**) widget provides the possibility to add an entire saved cart to the current cart from the details (**OrderInvoiceDetail**) page.

> **Tip**:
> Adding per line is also possible without this widget. This can be done if you open the saved cart, and then add lines to your new cart by clicking the plus sign on the line.

This widget can be used on the following page:

- Order (Authenticated)

The specific widget settings in the following should be defined:



- **Add to cart label + Term ID:** Type a name or a label for the widget. The name or label will be displayed on the portal. Next, type the term ID in the next box.
- **All orderlines:** Select this check box to add all order lines to the current cart with their original quantities.
- **Default value method:** Select the method to display the default quantity value in the widget. You can select from pre-defined values, such as **Widget setting**, **Minimum per item** (can be defined in Exact Globe Next), or from the free field values, which can be customized in Exact Globe Next. This field is only available if the **All orderliness** check box is cleared.
- **Default quantity:** Type the default quantity value to be displayed in the cart. This field is only available if **Widget setting** is selected at **Default value method**.

The following is an example:

Address widget

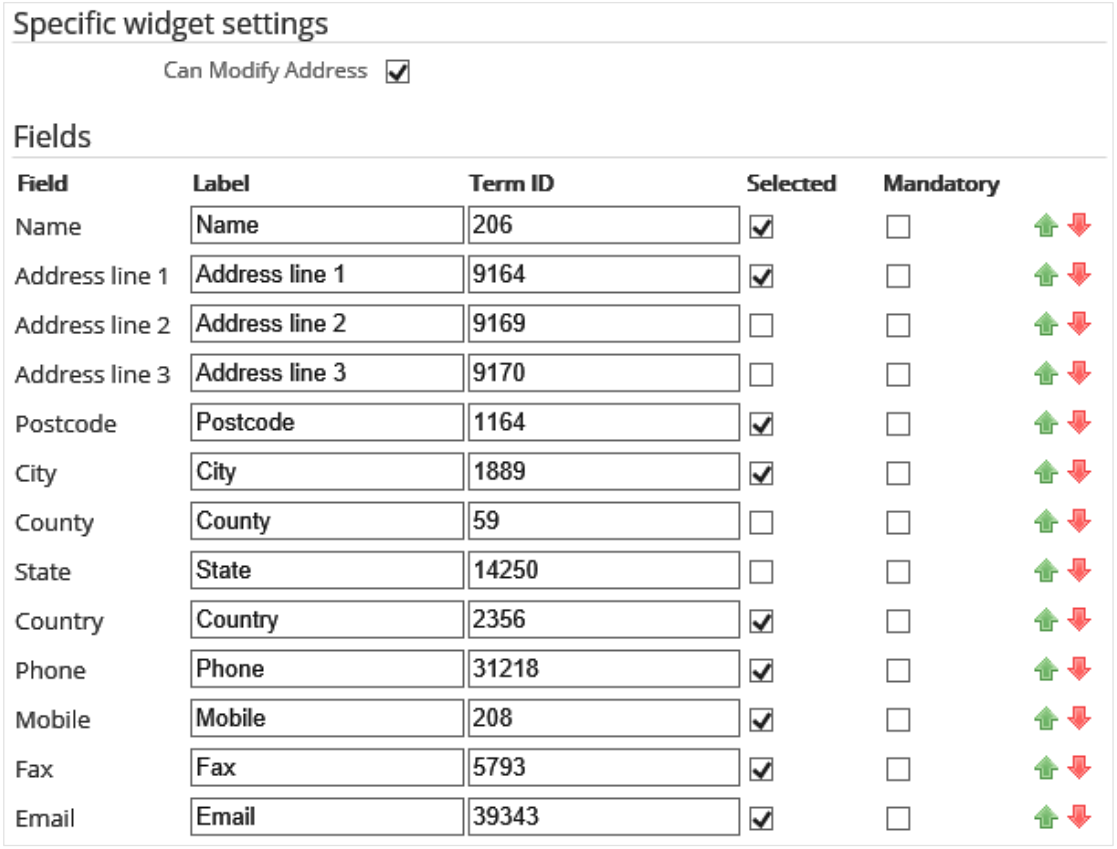
The **Address** widget can be used to define or view addresses. For an anonymous visitor or user, the address can always be defined on the **RequestInfo** page. On the **Delivery** page, the **Address** widget includes a **Delivery address** option which can be further configured.

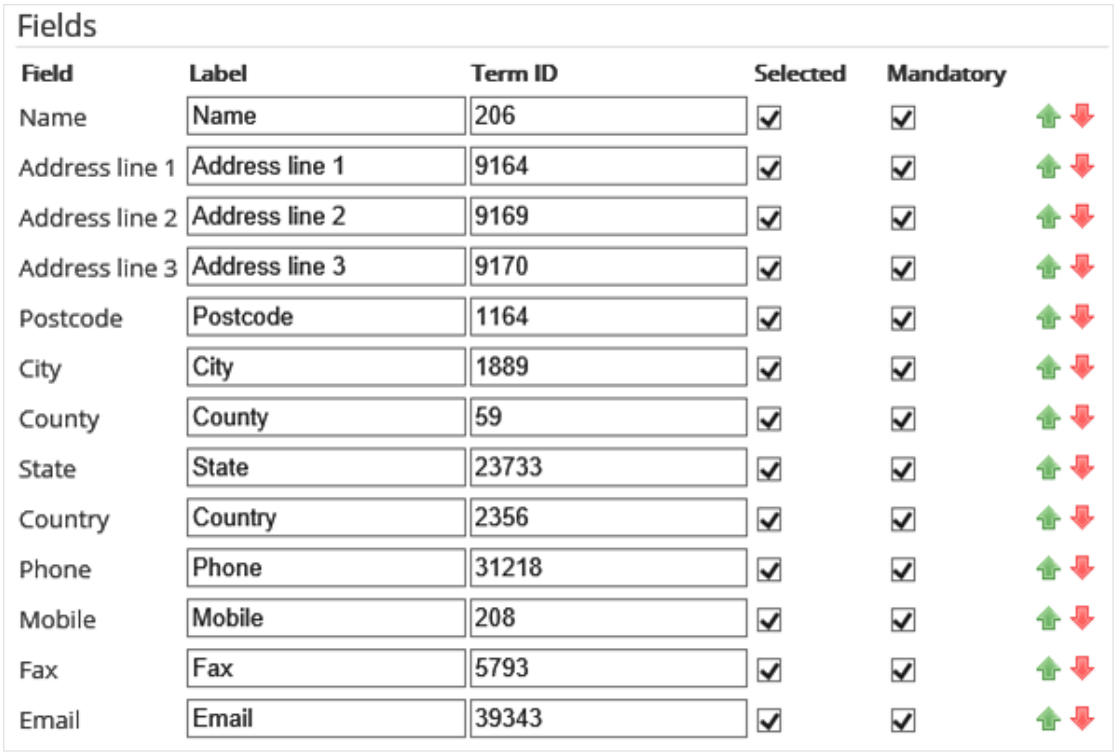
This widget can be used on the following pages:

- RequestInfo
- Delivery (Authenticated)
- Confirmation (Authenticated)
- Account (Authenticated)

Changes submitted by the visitors or users via the **Delivery** and **Confirmation** pages on the portals will be reflected in the sales orders and invoices in Exact Globe Next.

The specific widget settings in the following should be defined:

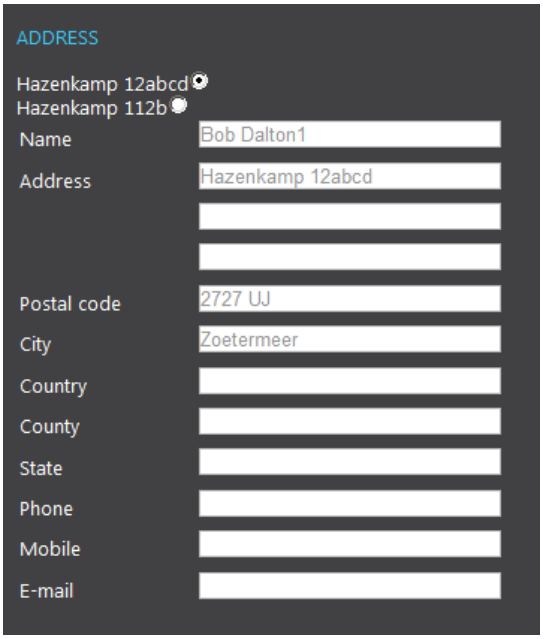




You can select the **Can Modify Address** check box under the **Specific widget settings** section to enable an authenticated visitor to modify the address (only for that occasion) during the delivery process and during information request.

The **Fields** section displays all the fields and the terms (term IDs) available for use. Select the **Selected** check box to display the fields. The fields can be labeled and moved up by clicking the icon or down by clicking the icon. The **Mandatory** check box must be selected if the field is a required field.

The following is an example of the **Address** widget with selected fields displayed on the portal:



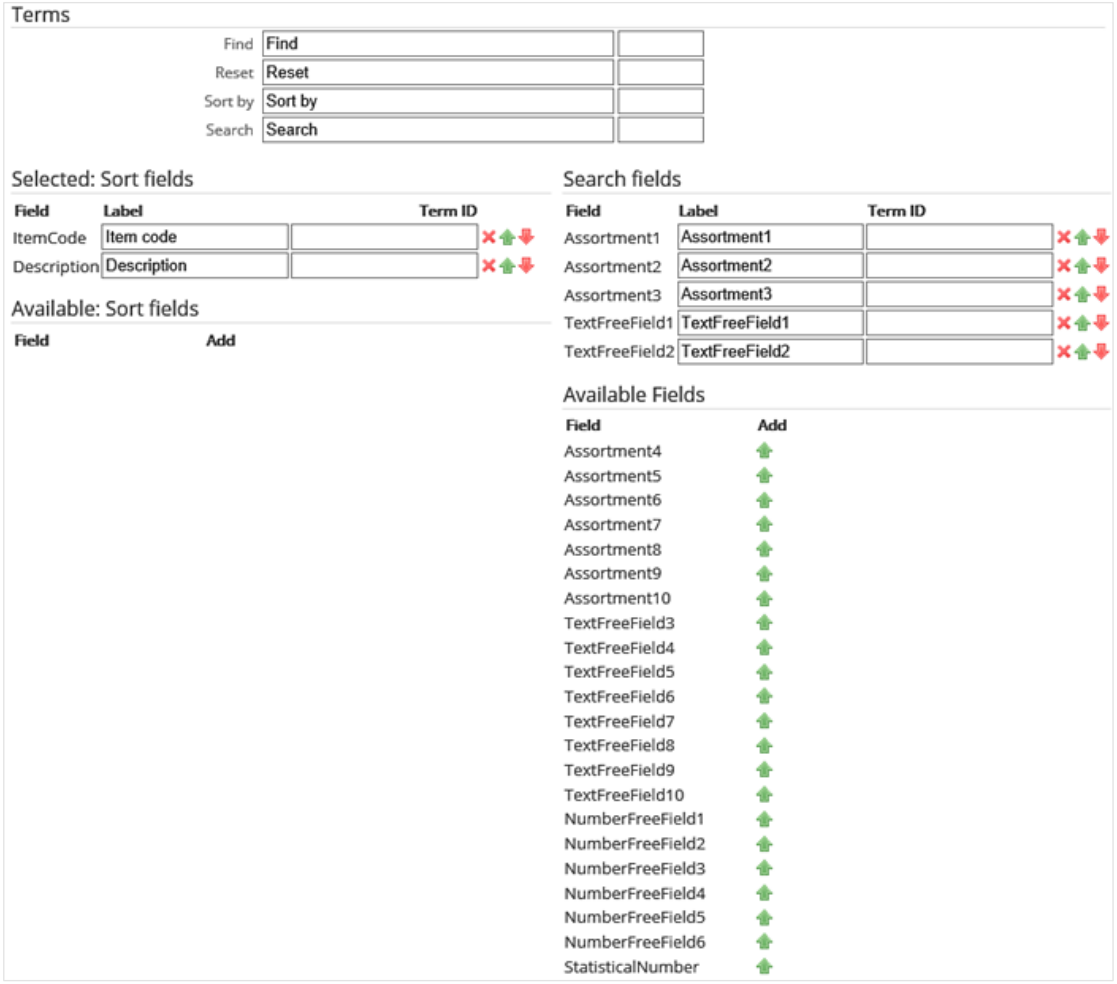
Advanced search widget

The **Advanced search** widget enables the visitor or user to search the item database. Depending on the settings made by the ECP administrator, the search criteria may vary.

This widget can be used on the following pages:

- Catalog
- Master

The specific widget settings in the following should be defined:



- Under the **Terms** section, type the title or label at **Find**. This text will be displayed next to the **Find** button on the portal. Type the term ID in the next box.
- At **Reset**, **Sort by**, and **Search**, type the title or label for each field. These texts will be displayed next to the **Reset**, **Sort by**, and **Search** buttons respectively on the portal. Type the term IDs in the boxes next to the corresponding fields.

The administrator can select a number of item fields that can be used during an item search by selecting them at the lower part of the page. Per field, a label including a term ID, can be linked. The sequence can also be defined here.

- The **Selected: Sort fields** section displays the selected fields in the widget on the portal only if you have clicked the icon in the **Add** column next to the required fields in the **Field** column under the **Available: Sort fields** section. You can change the title of the field in the **Label** column, and/or type the term ID in the **Term ID** column. The fields under this section, which will be displayed on the portal, can be deleted by clicking the icon, as well as moved up by clicking the icon or down by clicking the icon.
- The **Available: Sort fields** section displays the available fields for the sorting criteria. You can add fields to be sorted by clicking the icon in the **Add** column next to the required fields in the **Field** column. Once added, the selected fields will be displayed under the **Selected: Sort fields** section.

- The **Search fields** section displays the selected fields in the widget on the portal only if you have clicked the icon in the **Add** column next to the required fields in the **Field** column under the **Available Fields** section. You can change the title of the field in the **Label** column, and/or type the term ID in the **Term ID** column. The fields under this section, which will be displayed on the portal, can be deleted by clicking the icon, as well as moved up by clicking the icon or down by clicking the icon.
- The **Available Fields** section displays the available fields for the search criteria. You can add fields to be searched by clicking the icon in the **Add** column next to the required fields in the **Field** column. Once added, the selected fields will be displayed under the **Search fields** section.

The following is an example:

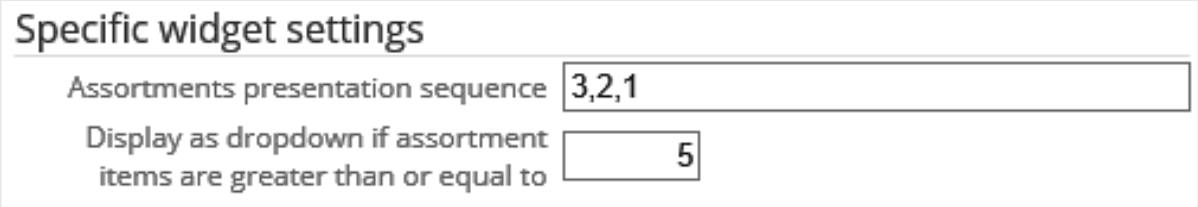
Assortments widget

The **Assortments** widget can be displayed on the **Master** page. It displays all assortments that are set in the widget property in the sequence you want to. This setting also applies to the way the assortments are displayed on the **Assortments** page.

This widget can be used on the following pages:

- Master
- Catalog

The specific widget settings in the following should be defined:

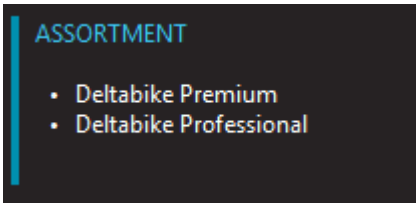


With this setting, you can decide which assortments to display and how the assortments should be displayed.

In the example shown above, the sequence is set to “1, 3, 2” at **Assortment presentation sequence**. This means that in the **Assortments** widget, assortment **1** is displayed. After selecting one of the lines, assortment **3** will be displayed on the **Assortments** page. Once one of the lines in assortment 3 is selected, assortment **2** will be displayed. So, with this widget, a drill down on item assortments can be done. Only assortments with valid items will be displayed.

The **Display as dropdown if assortment items are greater than or equal to** field enables you to opt for a different presentation when certain conditions are fulfilled.

The following is an example:



Note:
There can only be one **Assortments** widget on the **Master** page.

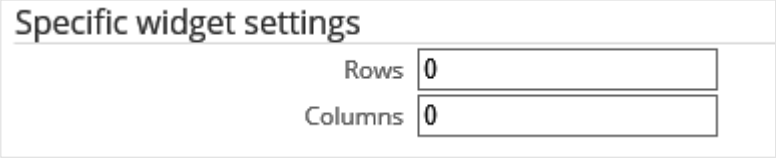
Assortments detail widget

The **Assortments detail** widget can be positioned on the **Assortments** page. It provides a link to the possible widgets that can be displayed for each assortment.

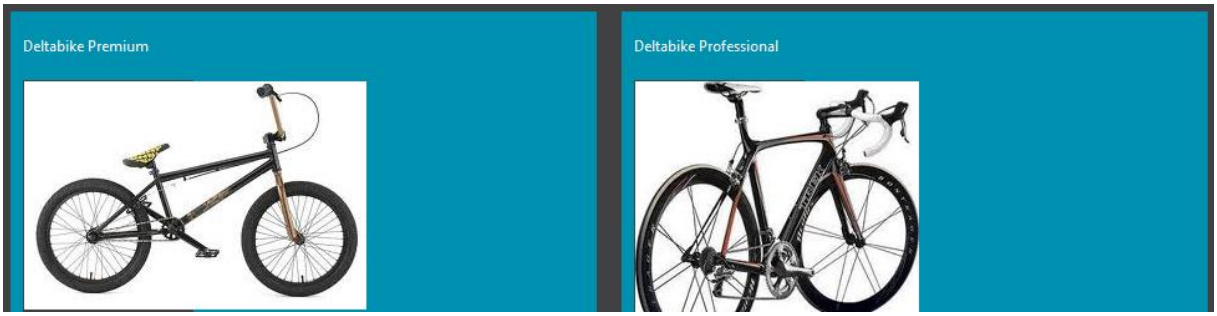
This widget can be used on the following page:

- Assortments

The specific widget settings in the following should be defined:



Under the **Specific widget settings** section, you can define the number of columns and rows. In the following example, two assortments are displayed next to each other:



Assortment image gallery widget

The **Assortment image gallery** widget can display images of an assortment on the **AssortmentCard** page and on the **Catalog** page.

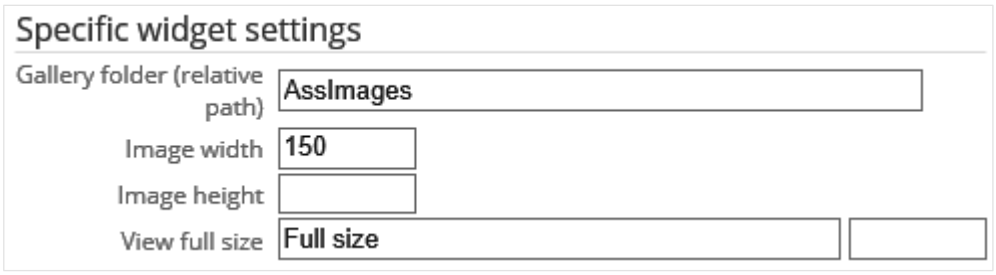
Note:
On the **AssortmentCard** page, the **Assortment image gallery** widget is known as the **Image gallery** widget.

These images are not stored in Exact Globe Next or Exact Synergy Enterprise. They are stored in a sub-directory of the B2B E-Commerce Portal installation directory. A sub-directory has to be created for each assortment, and the name has to equal to the assortment code. All the images that are copied into this directory will be displayed in the widget.

This widget can be used on the following pages:

- Assortment Card
- Catalog (the image of the last selected assortment will be displayed)

The specific widget settings in the following should be defined:



- **Gallery folder (relative path):** Type the path for the folder that stores the images for the assortments. In your B2B E-Commerce Portal installation directory, a new sub-directory should be created. In this new sub-directory, a sub-directory should be created for each assortment. The name should be in sequence which begins with the hyphen symbol (-) followed by the assortment code. For example 1-DBPR, 1 DBPRO, 2-PROD, and so on. The sequence is set in the **Assortments** widget on the **Master** page. All the images that are in this sub-directory will be displayed in the widget.
- **Image width:** Type the width for the picture of the Assortment image gallery widget in pixels. If this is left blank, the standard width of the image will be used or the width will be calculated based on the defined height.
- **Image height:** Type the height for the picture of the Assortment image gallery widget in pixels. If this is left blank, the standard height of the image will be used or the height will be calculated based on the defined width.
- **View full size:** Type the label to hyperlink to the full sized image once the hyperlink is clicked. This label will be displayed below the image. Type the term ID in the next box.

The following is an example:

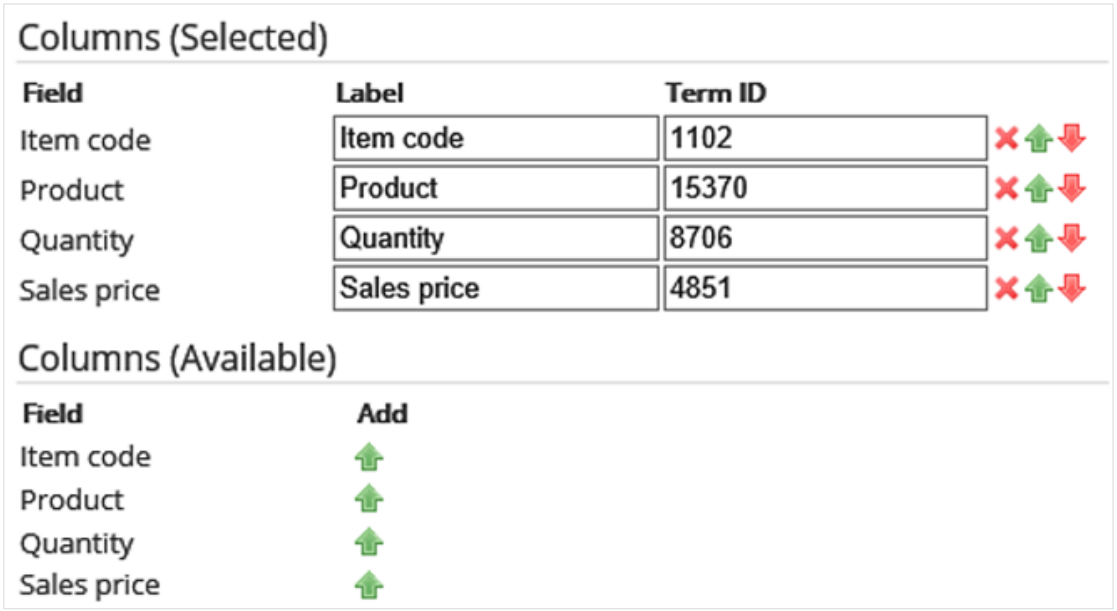
At least one widget

This widget displays all the items that are defined as **At least one** for the selected item in Exact Globe Next (**Variant** functionality).

This widget can be used on the following page:

- Variant

The specific widget settings in the following should be defined:



- The **Columns (Selected)** section displays the selected columns to be displayed in the widget on the portal only if you have clicked the icon in the **Add** column next to the required columns under the **Columns (Available)** section. You can change the title of the field at **Label**, and/or type the term ID at **Term ID**. The columns to be displayed on the portal can be deleted by clicking the icon, as well as moved up by clicking the icon or down by clicking the icon.
- The **Columns (Available)** section displays the available columns that can be added to the **Columns (Selected)** section by clicking the icon in the **Add** column. Once added, the selected columns will be displayed under the **Columns (Selected)** section.

Breadcrumb widget

The **Breadcrumb** widget is used to show the visitors or users the current menu path that they are on so that they are able to keep the navigation trail. It can practically be placed on all pages.

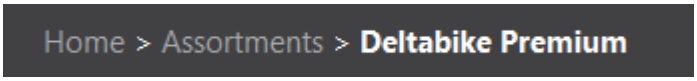
This widget can be used on the following pages:

- Home
- Login
- ResetPassword
- ResetPasswordThankYou
- Account (Authenticated)
- Assortments
- Item categories
- Catalog
- Cart (Authenticated)
- CartDetail (Authenticated)
- Delivery (Authenticated)
- Confirmation (Authenticated)
- ElectronicPayment
- CartThankYou
- Order
- OrderInvoiceList (Authenticated)
- OrderInvoiceDetail (Authenticated)
- FavoriteItems (Authenticated)
- CreateProspect
- CreateProspectThankYou
- RequestInfo
- RequestInfoThankYou
- Custom pages

The specific widget setting in the following should be defined:

- **Separator:** Type the separator to be displayed between the breadcrumb components.

The following is an example:



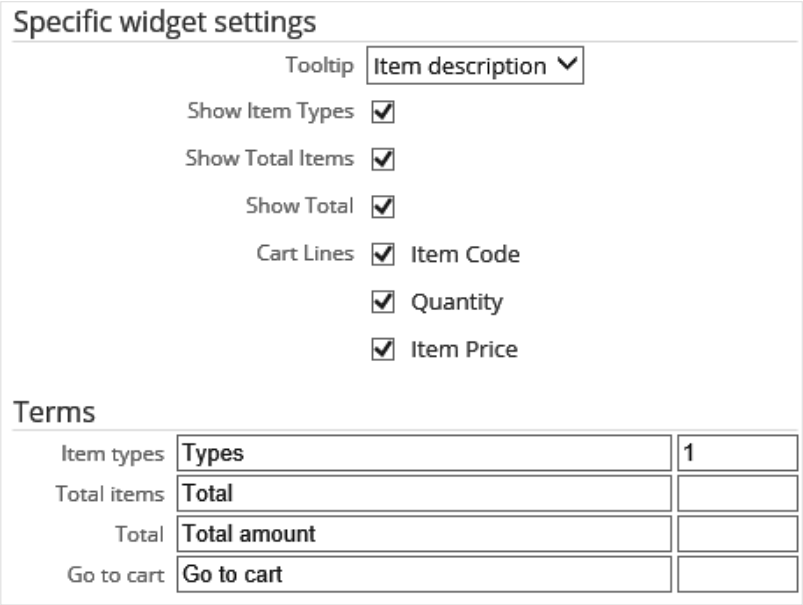
Cart widget

The **Cart** widget is used on the **Master** page. It contains information about the items that have been added to the shopping cart. The check-out process can be initiated through this widget.

This widget can be used on the following page:

- Master

You will able to decide what information you want to display in the Cart widget on the master page. The specific widget settings in the following should be defined:



- Under the **Specific widget settings** section, you can choose to display the information for the tool tips at **Tooltip** when the visitor or user hovers the mouse over the item code in the **Cart** widget. Select from the (language-specific) item descriptions or the item texts in Exact Globe Next or none at all.
- Select the required check boxes at **Show Item Types**, **Show Total Items**, and **Show Total** to show the types of the items, total of the items, and total amount. You can also select the **Item Code**, **Quantity**, and **Item Price** check boxes at **Cart Lines** to display the cart item lines that include the item code, quantity, and price.
- At **Item types, Total items**, **Total**, and **Go to cart** under the **Terms** section, type the label or text for the fields to be displayed in the cart. Type the term ID next to each label.

The following is an example:

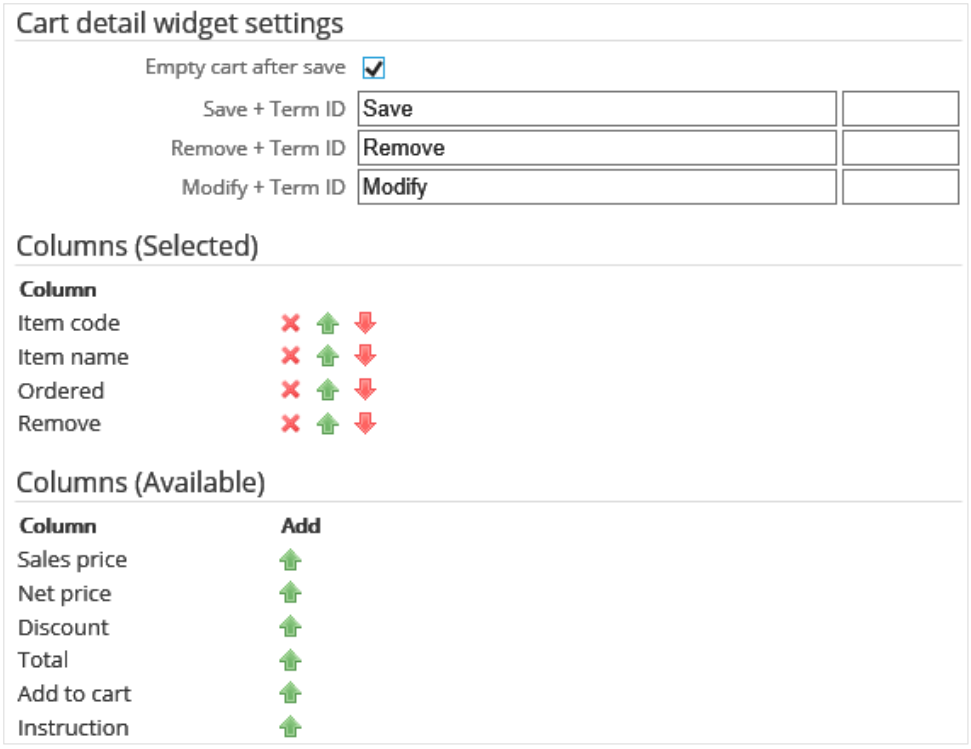
Cart details widget

The **Cart details** widget provides information about the filled shopping cart or the saved shopping cart.

This widget can be used on the following pages:

- Cart (this widget displays the details of the actual shopping cart)
- CartDetail (this widget displays the details of the saved cart)
- Confirmation (this widget displays the details of the actual shopping cart)
- Delivery

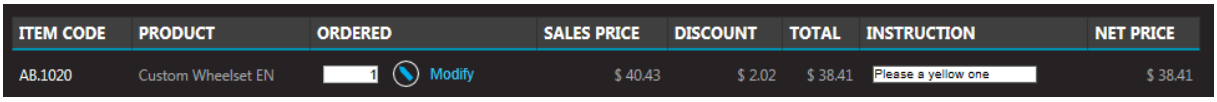
The specific widget settings in the following should be defined:



- Under the **Cart detail widget settings** section, select the **Empty cart after save** check box (available only for the **Authenticated Design** page) to enable the current cart to be emptied when it is saved to the saved cart. If this option is disabled, the current cart will be kept and saved.
- At **Save + Term ID** (available only for the **Authenticated Design** page), type a label to be displayed as the **Save** button. Type the term ID in the next box.
- At **Remove + Term ID**, type a label to be displayed as the **Delete** button. Type the term ID in the next box.
- At **Modify + Term ID**, type a label to be displayed as the **Modify** button. Type the term ID in the next box.
- The columns that are displayed on the portal are actually contained under the **Columns (Selected)** section. The columns can be selected from the **Columns (Available)** section. Click the icon to delete the columns or click the icon to add columns. Also, the sequence can be set by clicking the icon or the icon.

The **Instruction** column enables the visitors to add remarks specifically to cart lines. These will end up in the instruction lines of the sales order in Exact Globe Next.

The following is an example:



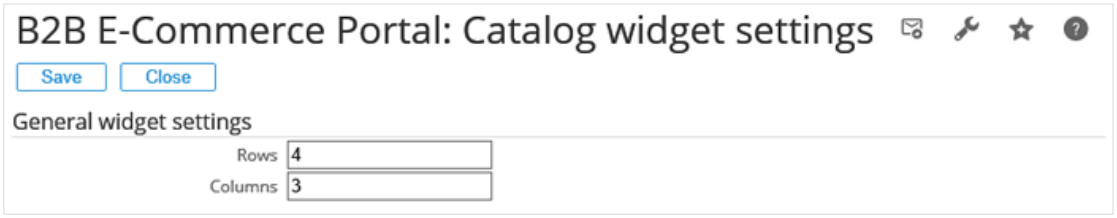
Catalog widget

The **Catalog** widget can be added on the **Catalog** page. It provides a link to the possible widgets that can be displayed for each item on the **Catalog** page.

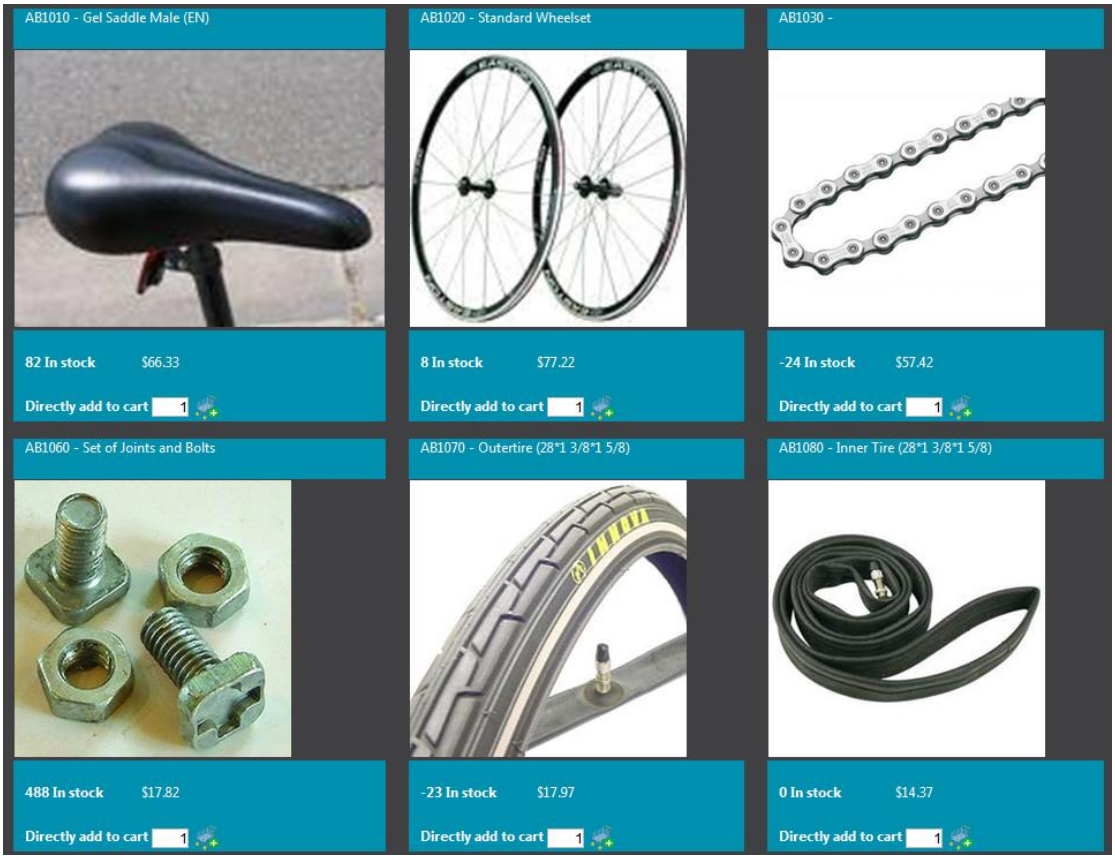
This widget can be used on the following page:

- Catalog

The specific widget settings in the following should be defined:



On this page, you can define the number of columns and rows. In the following example, two rows with three items per row are displayed:



Change password widget

This widget can be used on the **ResetPassword** page to provide an option for the authenticated users or visitors to change the system-generated password to another that is memorable to them. The password can only be changed once the authenticated users or visitors have logged on to the portal with the initial password given to them. Users will be automatically redirected to the **ResetPasswordThankYou** page once the password has been successfully changed.

The specific widget settings in the following should be defined:

- **Current password + Term ID** - Type the label for the **Current password** field. This is mandatory. Type the term ID in the next box.

Note:
When using the **Change password** widget on the portal, this field will be validated. An error message will be displayed if the field is left blank, or when the current password does not match the login password of the user.

- **New password + Term ID** - Type the label for the **New password** field. This is mandatory. Type the term ID in the next box.

Note:
When using the Change password widget on the portal, this field will be validated. The new password must be different from the current password. Otherwise an error message will be displayed.

- **Confirm password + Term ID** - Type the label for the **Confirm password** field. This is mandatory. Type the term ID in the next box.

Note:
When using the Change password widget on the portal, this field will be validated. An error message will be displayed if the password at New password does not match the password typed as a confirmation.

- **Submit + Term ID** - Type the label for the **Submit** button used for submitting the form data. Type the term ID in the next box.

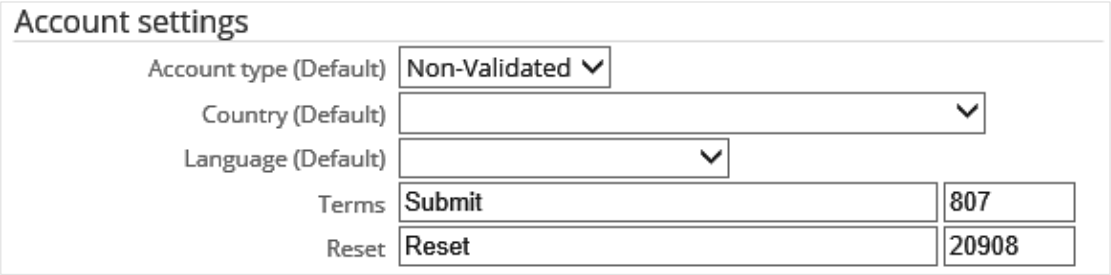
Create prospect widget

With this widget, an anonymous visitor or user can request for a login to the portal or an authenticated visitor or user can request for a login for a new contact person. This will result in the creation of a new account or a new contact person in Exact Synergy Enterprise, a request in Exact Synergy Enterprise, and a document or mail merge in Exact Synergy Enterprise. For more information on the **CreateProspect** page, see *4.3.3.Content pages in detail*.

This widget can be used on the following pages:

- CreateProspect
- Confirmation (Anonymous)
- Delivery (Anonymous)

The specific widget settings in the following should be defined:



These settings only apply to an anonymous visitor or user.

- Account type (Default): Select the default account type to be created in Exact Synergy Enterprise with the following status:
- Non-Validated
- Lead
- Suspect
- Prospect
- Associate
- Country (Default): Select the default country to be displayed on the portal.
- Language (Default): Select the default language to be displayed on the portal.
- Terms**:** Type the label or text to be displayed as the **Submit** button.
- Reset: Type the label or text to be displayed as the **Reset** button.

The type of information that you want to keep for tracking your prospects are all readily available under the **Fields** section at the bottom of the page, shown as following:

Fields

Field	Label	Term ID	Selected	Mandatory
Company data	Company data	1653		
Add free field				
Company name	Company name	11537	☑	☑
Tax code	Tax code	1119	☐	☐
Chamber of Commerce	Chamber of Commerce	32747	☐	☐
Postal address	Postal address	31270		
Address	Address	6817	☑	☑
Zip code	Zip code	31277	☑	☑
City	City	1889	☑	☑
County	County	59	☐	☐
Country	Country	2356	☑	☑
State	State	23733	☐	☐
Delivery address	Delivery address	31272		
Address	Address	6817	☑	☑
Zip code	Zip code	31277	☑	☑
City	City	1889	☑	☑
County	County	59	☐	☐
Country	Country	2356	☑	☑
State	State	23733	☐	☐
Contact person	Contact person	8484		
Title	Title	1672	☑	☑
Initials	Initials	1337	☑	☐
First name	First name	1673	☑	☐
Middle name	Middle name	30003	☑	☐
Last name	Last name	207	☑	☑
E-mail	E-mail	5804	☑	☑
Language	Language	1675	☑	☐
Job title	Job title	29537	☑	☑
Job description	Job description	2541	☑	☑
Phone	Phone	31218	☑	☐
Mobile	Mobile	208	☑	☐
Fax	Fax	5793	☑	☐
ECP Authentication	ECP Authentication	38226		
User name	User name	8928	☑	☑
Password	Password	8436	☑	☑
Confirm	Confirm	6593	☑	☑

- Select the check boxes that correspond to the required fields in the **Selected** column. The **Mandatory** check box must be selected if the fields are mandatory. You can change the name or title of the field at **Label**, and/or type the term ID at **Term ID**. The sequence of the fields to be displayed on the portal can be moved up by clicking the icon or down by clicking the icon. In case additional fields are required, click **Add free field**. These free fields can be deleted by clicking the icon.

The following is an example:

Customer data widget

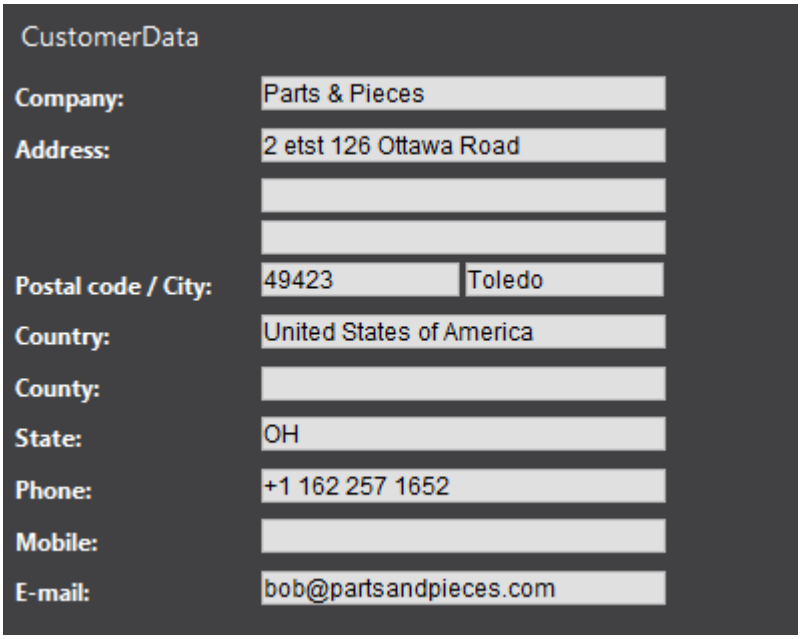
The **Customer data** widget displays the information related to the customers, such as the company name and address. The data cannot be edited. However, you can allow your customers to send in requests through e-mails or calls for changes to be done manually.

This widget can be used on the following pages:

- Account (Authenticated)
- Delivery
- Confirmation
- CreateProspect (Authenticated)
- Order (Authenticated)

Note:
There are no specific settings for this widget.

The following is an example:



Delivery date widget

The **Delivery date** widget enables the visitors to define or view the delivery date during the check-out process.

This widget can be used on the following pages:

- Delivery (on this page, the widget can be edited)
- Confirmation (on this page, the widget cannot be edited)

Note:
There are no specific settings for this widget.

The following is an example:

Delivery method widget

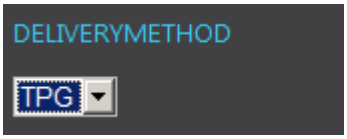
This widget enables the visitors to select one of the delivery methods that are available in Exact Globe Next. All delivery methods from Exact Globe Next will be displayed on the portal.

This widget can be used on the following pages:

- Delivery (on this page, the widget can be edited)
- Confirmation (on this page, the widget cannot be edited)

Note:
There are no specific settings for this widget.

The following is an example:



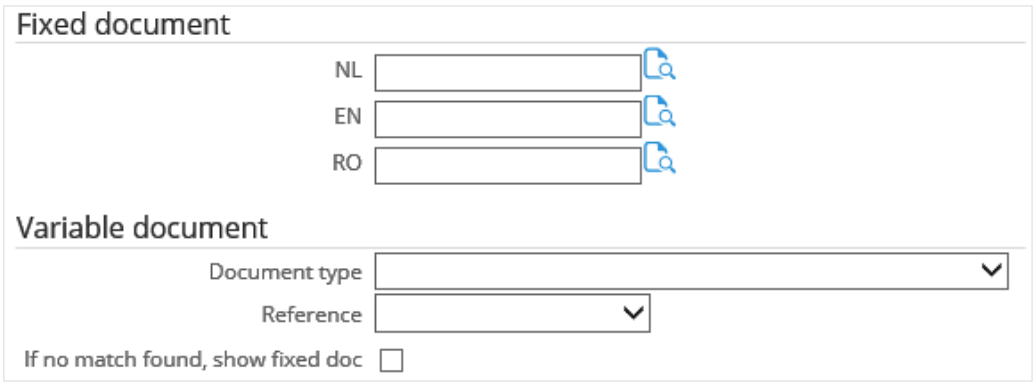
Document widget

The **Document** widget displays a document (content) that has been created in Exact Synergy Enterprise, including layout and images. The document should have the status **Approved** and the correct security level in Exact Synergy Enterprise to enable your viewers to view the document.

This widget can be used on the following pages:

- Account (Authenticated)
- Assortments
- AssortmentCard
- Cart (Authenticated)
- CartThankYou (Authenticated)
- CartDetail (Authenticated)
- CatalogItem
- CreateProspect
- CreateProspectThankYou
- Confirmation
- Delivery
- ElectronicPayment
- FavoriteItems (Authenticated)
- Home
- Item
- Login
- OrderInvoiceList (Authenticated)
- RequestInfoThankYou
- ResetPassword
- ResetPasswordThankYou
- Variant
- Custom pages

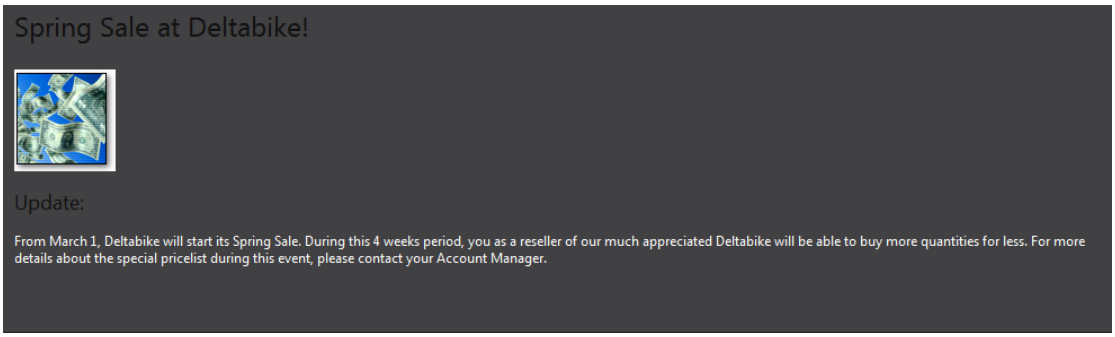
The specific widget settings in the following should be defined:



- Under the **Fixed document** section, select the document to be linked to each selected language field.
- At **Document type** under the **Variable document** section, select the document type available in Exact Synergy Enterprise that should be displayed in the widget.
- At **Reference**, select one of the following options:
  - **Referenced customer:** Select this option to display a document that is specifically linked to this account in Exact Synergy Enterprise, in the widget (for authenticated visitors or users).
  - **Referenced item:** Select this option to display a document that is specifically linked to the item that is on the page (**Item** page) in Exact Synergy Enterprise, in the widget.
  - **Fixed item:** Select this option to link a fixed item in Exact Synergy Enterprise. You have to make sure that the item code in Exact Globe Next is the same.
- **If no match found, show fixed doc**: Select this check box if no document can be found to be displayed based on the selection above. The fixed document will be displayed in the widget.

If more than one document is found, the document with the lowest document number (document ID) will be displayed.

The following is an example:



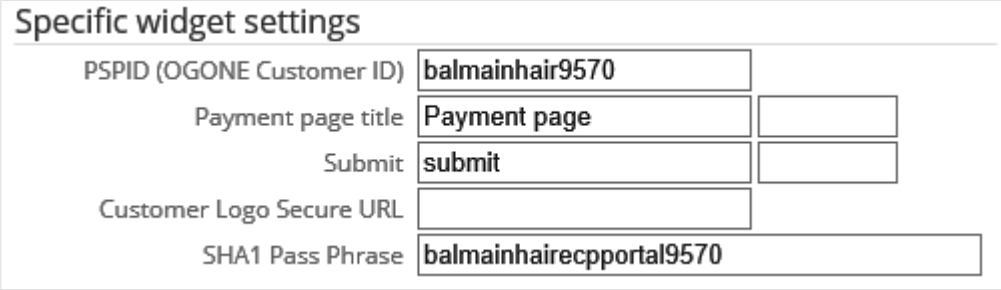
Electronic Payment widget

This widget can be added to the **ElectronicPayment** page. It enables you to define the necessary properties for Ogone. As mentioned before, you should subscribe to Ogone in order to be able to use electronic payment with the B2B E-Commerce Portal. For more information on the **ElectronicPayment** page, see at *4.3.3 Content pages in detail*.

This widget can be used on the following page:

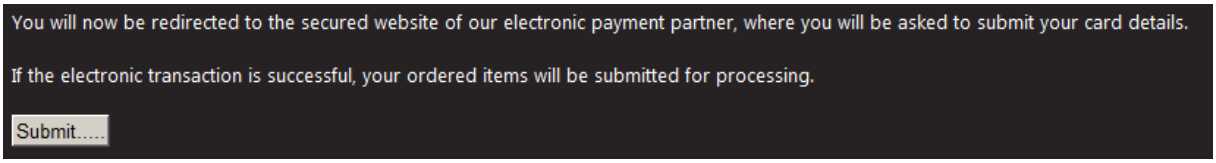
- ElectronicPayment

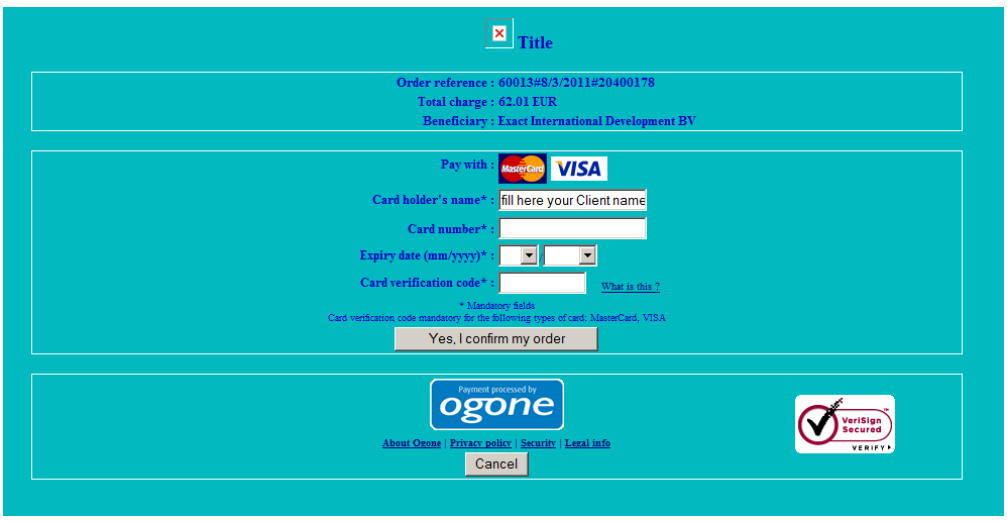
The specific widget settings in the following should be defined:



- **PSPID (OGONE Customer ID):** Type the customer ID provided by Ogone.
- **Payment page title:** Type the title of the payment page. It is available at the Ogone website. Type the term ID in the next box.
- **Submit:** Type the label or text to be displayed for the **Submit** button on the portal. Type the term ID in the next box.
- **Customer Logo Secure URL:** Type the URL containing the (your) customer logo. It will be displayed on the Ogone payment page.
- **SHA1 Pass Phrase:** Type the pass phrase which should be the pass phrase that was defined in the Ogone environment. The B2B E-Commerce Portal supports the SHA1 encryption from Ogone.

The following is an example:





Excel import widget

This widget can be used by the visitors or users to import a cart from a Microsoft Excel worksheet. This Excel sheet could be from the ERP system that is used by the visitor. The Excel sheet should only contain two columns with headers:

- Item code
- Quantity

Itemcode	Quantity
Ab1010	2
AB1021	3

The **Excel import** widget will only work if Microsoft Excel is installed on the IIS server.

This widget can be used on the following page:

- Cart

The specific widget settings in the following should be defined:

- **Import:** Type a name or label to be displayed for the **Import** button on the portal. Type the term ID in the next box.
- **Browse:** Type a name or label to be displayed for the **Browse** button on the portal. Type the term ID in the next box.

The following is an example:

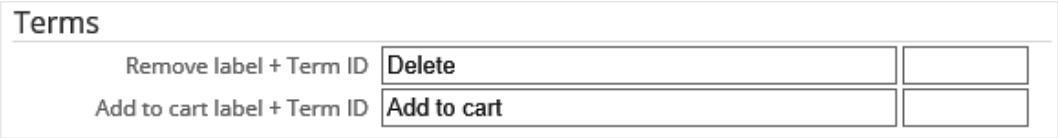
Favorite items widget

This widget is available on the **FavoriteItems** page, allowing you to view the favorite items.

This widget can be used on the following pages:

- FavoriteItem (Authenticated)
- Account (Authenticated)

The specific widget settings in the following should be defined:



- **Remove label + Term ID:** Type a name or label to be displayed for the **Remove** button on the portal. Type the term ID in the next box.
- **Add to cart label + Term ID:** Type a name or label to be displayed for the **Add to cart** button on the portal. Type the term ID in the next box.

The following is an example:

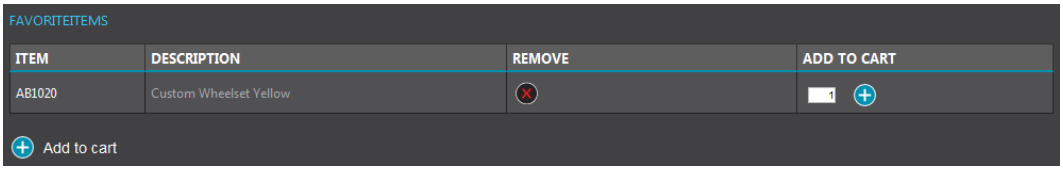


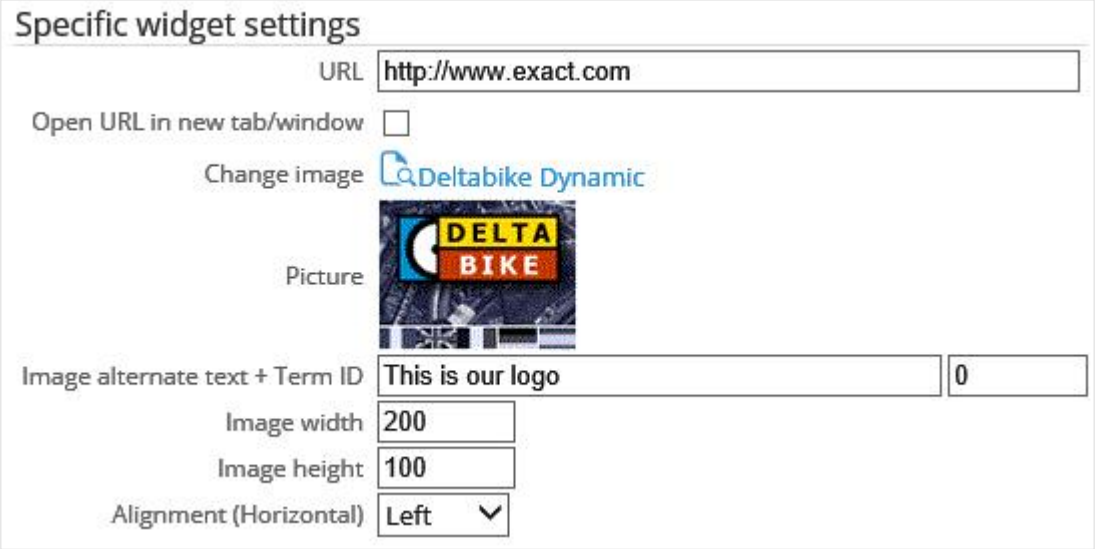
Image widget

The **Image** widget can be used to display an image that has been uploaded in Exact Synergy Enterprise, on the portal. For instance, your company logo can be displayed by using the **Image** widget.

This widget can be used on the following pages:

- Home
- Master
- Custom pages

The specific widget settings in the following should be defined:



- **URL:** Type the URL to which this image links, such as an item page on the portal.
- **Open URL in a new tab/window:** Select this check box if you want the link at **URL** to be opened in a new tab or window on the web browser of the visitor or user.
- **Change image:** Select the image or logo uploaded in Exact Synergy Enterprise.
- **Picture:** This field displays the image or logo selected at **Change image**.
- **Image alternate text + Term ID:** Type the alternate text or description of the image which will be displayed on the portal if you hover the mouse over the image. Type the term ID in the next box.
- **Image width:** Type the width for the picture of the **Image** widget in pixels. If this is left blank, the standard width of the image will be used or the width will be calculated based on the defined height.
- **Image height:** Type the height for the picture of the **Image** widget in pixels. If this is left blank, the standard height of the image will be used or the height will be calculated based on the defined width.
- **Alignment (horizontal):** Select **left**, **center**, or **right** for the image to be displayed on the portal.

The following is an example:

Impersonate customers widget

If a reseller or an employee is logged on to the portal, the reseller or employee can view a list of the customers (debtors) that are linked in Exact Synergy Enterprise (to the reseller or the employee as **Account manager**). The reseller or employee can impersonate the customer and can register a new order for that customer.

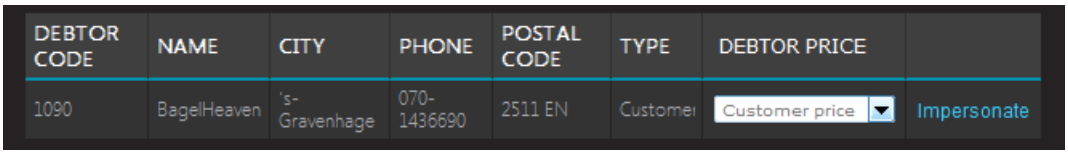
This widget can be used on the following page:

- Account (Authenticated)

The specific widget settings in the following should be defined:

- Under the **Terms** section at **Find**, type a name or label to be displayed for the **Find** button on the portal. Type the term ID in the next box.
- **Reset:** Type a name or label to be displayed for the **Reset** button on the portal. Type the term ID in the next box.
- **Impersonate:** Type a name or label to be displayed for the **Impersonate** button on the portal. Type the term ID in the next box.
- **Unimpersonate:** Type a name or label to be displayed for the **Unimpersonate** button on the portal. Type the term ID in the next box.
- Under the **Other settings** section at **Number of lines per widget**, type the number of linked customers to be displayed on one page.

The following is an example:



Note:
As of product update 251, when you log in as a reseller, you can decide which pricing (either Customer price or Reseller price) to be used as the net price and which pricing will be displayed on the Item or Catalog page before you impersonate the customers of your choice to conduct any business transactions on the portal.
With this enhancement, all price calculation related functions, such as sales prices, discounts, and total sum will reflect the change accordingly. This information will be displayed under the Cart section on the Account page, Cart page, Delivery page, and Confirmation page.

Also, the sales orders will be invoiced to the respective resellers or customers depending on the pricing selected in the widget. Hence, the **Invoice to** widget is no longer supported.

Instruction line widget

The **Instruction line** widget can be added to the **Catalog** and **Item** pages. It allows either the authenticated or anonymous visitors or users to type their remarks or instructions in text boxes for the items they order on the **Catalog** or **Item** page on the B2B E-Commerce Portals. When they click the **Add to cart** button and view the cart, these remarks or instructions will be displayed in the **Cart details** widget as additional information to the filled shopping cart or the saved shopping cart. You can use the **Cart details** widget on the **Cart**, **Delivery**, **CartDetail**, and **Confirmation** pages to show the cart details with the remarks or instructions on the portals. If the visitors or users continue to check out the cart, this information will be generated as the instruction lines of the sales order in Exact Globe Next.

This widget can be used on the following pages:

- CatalogItem via Catalog
- Item

Note:
There are no specific settings for this widget.

Invoice to widget

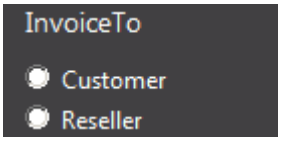
The **Invoice to** widget can to be added to the **Delivery** page. It will only be displayed if a reseller or employee is logged in. The reseller or employee can decide who to be invoiced (reseller or customer) for the cart during the check-out process. The **Invoice to** section of the sales order in Exact Globe Next will be changed accordingly.

This widget can be used on the following pages:

- Delivery (Authenticated)
- Confirmation, read-only (Authenticated)

Note:
There are no specific settings for this widget.

The following is an example:



Note:
This widget is no longer supported from product update 251 onwards due to the enhancement made on the **Impersonate customers** widget. For more information, see *Impersonate customer widget*.

Item add to cart widget

The **Item add to cart** widget can be used to add a selected item directly to the shopping cart.

This widget can be used on the following pages:

- CatalogItem
- Item

The specific widget settings in the following should be defined:

- **Image:** Select the image or logo in Exact Synergy Enterprise. This image will be displayed before or after the quantity value in the widget. If no image is selected, the default image from the theme will be used.
- **Change image:** This field displays the image or logo selected at **Image**.
- **Image width:** Type the width for the picture of the widget in pixels. If this is left blank, the standard width of the image will be used or the width will be calculated based on the defined height.
- **Image height:** Type the height for the picture of the widget in pixels. If this is left blank, the standard height of the image will be used or the height will be calculated based on the defined width.
- **Label:** Type the label or text for the widget to be displayed on the portal. Type the term ID in the next box.
- **Default value method:** Select the method to display the default quantity value in the widget. You can select from pre-defined values, such as **Widget setting**, **Minimum per item** (can be defined in Exact Globe Next), or from the free field values which can be customized in Exact Globe Next.
- **Default quantity:** Type the default quantity value to be displayed in the cart. This field is only available if **Widget setting** is selected at **Default value method**.
- **Add to cart position:** Select **Left**, **Right**, **Above**, or **Under** to position the widget around the quantity value.

The following is an example:

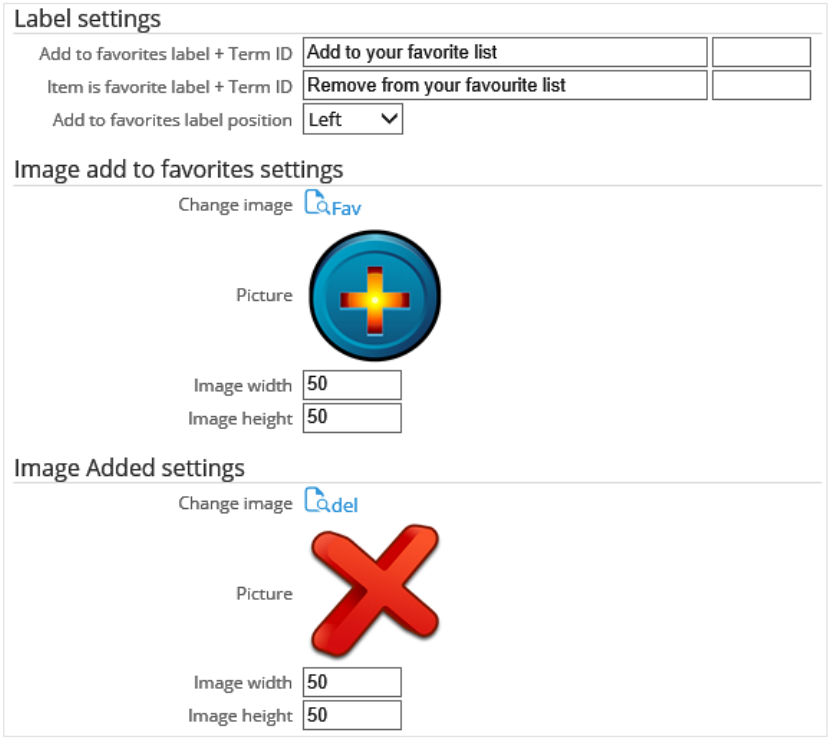
Item add to favorites widget

This widget enables an authenticated visitor to add items to a favorite list. The visitor can easily add items from the favorite list to the shopping cart.

This widget can be used on the following pages:

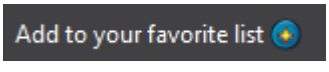
- CatalogItem (Authenticated)
- Item (Authenticated)

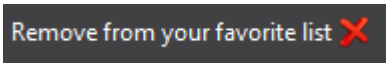
The specific widget settings in the following should be defined:



- Under the **Label settings** section at **Add to favorites label + Term ID**, type the label or text to be displayed when adding the item to the favorite list on the portal. Type the term ID in the next box.
- At **Item is favorite label + Term ID**, type the label or text to be displayed when an item is a favorite item on the portal. Type the term ID in the next box.
- At **Add to favorites label position**, select **Left**, **Right**, **Above**, or **Under** as the position to place the text around the image.
- Under the **Image add to favorites settings** section at **Change image**, select an image in Exact Synergy Enterprise to be displayed if the item is not yet a favorite item. Once selected, the image will be displayed at **Picture**. You can also define the width and height of the image at **Image width** and **Image height**.
- Under the **Image Added settings** section at **Change image**, select an image in Exact Synergy Enterprise to be displayed if the item is a favorite item. Once selected, the image will be displayed at **Picture**. You can also define the width and height of the image at **Image width** and **Image height**.

The following is an example:





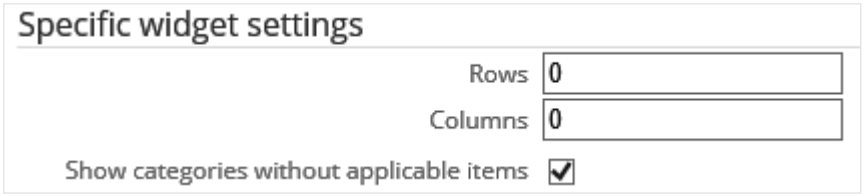
Item categories (or ItemCategoriesDetails) widget

The **Item categories** widget can display item categories on the **Master** page or **ItemCategories** page. This widget can also display picture(s) per category and can be placed horizontally or vertically.

This widget can be used on the following pages:

- Master
- ItemCategories

The specific widget settings in the following should be defined:



- **Rows:** Type the number of rows for the item categories to be displayed on the portal.
- **Columns:** Type the number of columns per row for the item categories to be displayed on the portal.
- **Show categories without applicable items:** Select this check box to display the item categories without the details (sub-categories). Only specific users from the selected account, sector, subsector, classification, or size (number of employees) defined on the **B2B E-commerce Portal: Portal item selection settings** page can view the sub-categories if this check box is selected.

The following is an example:

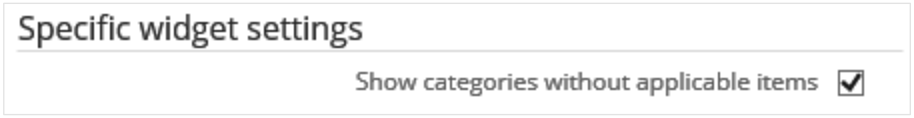
Item Categories (Text) widget

The **Item categories (Text)** widget can display item categories without pictures on the **Master** page.

This widget can be used on the following page:

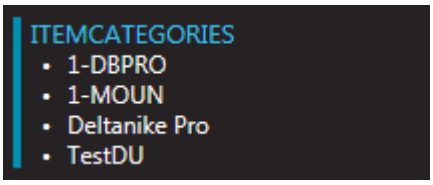
- Master

The specific widget setting in the following should be defined:



- **Show categories without applicable items:** Select this check box to display the item categories without the details (sub-categories). Only specific users from the selected account, sector, subsector, classification, or size (number of employees) defined on the **B2B E-commerce Portal: Portal item selection settings** page can view the sub-categories if this check box is selected.

The following is an example:



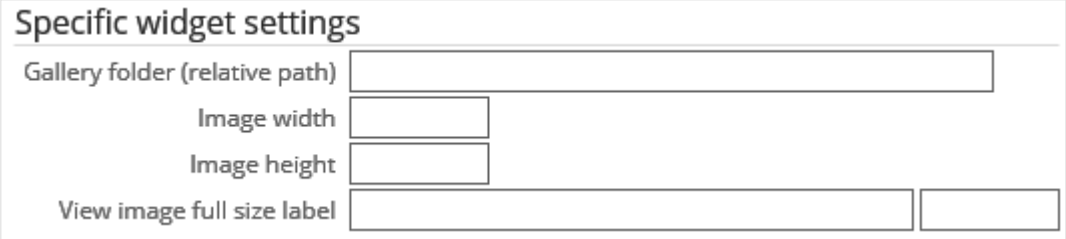
Item category image gallery widget

The **Item category image gallery** widget can display images of an item category on the **Catalog** page.

This widget can be used on the following pages:

- Catalog
- ItemCategories

The specific widget settings in the following should be defined:



- **Gallery folder (relative path):** Type the path for the folder that stores the images for the item categories. In your B2B E-Commerce Portal installation directory, a new sub-directory should be created. In this new sub-directory, a sub-directory should be created for each item category. The name should be equal to the item category code. All the images that are in this sub-directory will be displayed in the widget.
- **Image width:** Type the width for the picture of this widget in pixels. If this is left blank, the standard width of the image will be used or the width will be calculated based on the defined height.
- **Image height:** Type the height for the picture of this widget in pixels. If this is left blank, the standard height of the image will be used or the height will be calculated based on the defined width.
- **View image full size label:** Type the label to hyperlink to the full sized image once the hyperlink is clicked. This label will be displayed below the image. Type the term ID in the next box.

Item fields widget

The **Item fields** widget can display any item field on the **Catalog** or **Item** page.

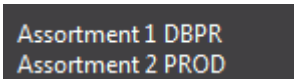
This widget can be used on the following pages:

- CatalogItem
- Item

The specific widget settings in the following should be defined:

All item fields that are available in the Exact Globe Next item table can be displayed to the visitor. In this widget, the fields under the **Search fields** section can be added by clicking the icon in the **Add to search** column next the fields under the **Available Fields** section. Once the search fields have been added under the **Search fields** section, you can change the label and the term ID can be defined. Select the **Hide free fields with no value** check box to display the free fields with values only.

The following is an example:



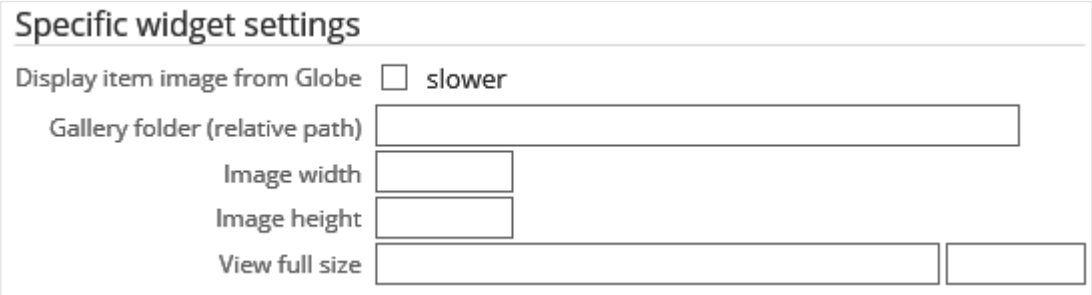
Item image gallery widget

In the standard Exact Globe Next product, one image can be linked to one item. More often than not, in a portal environment, additional images need to be displayed for one item. This can be accomplished with the **Item image gallery** widget. This widget will display the Exact Globe Next image and the extra images. The number of extra images (besides the Exact Globe Next image) is indefinite, and has a direct impact on the layout design and presentation of the widget.

This widget can be used on the following pages:

- CatalogItem
- Item

The specific widget settings in the following should be defined:



- **Display item image from Globe:** Select this check box to display the image that is linked to the item in Exact Globe Next. Note that displaying an image from Exact Globe Next is slower than displaying an image from the hard disk.
- **Gallery folder (relative path):** Type the location path of the gallery folder. In your B2B E-Commerce Portal installation directory, a new sub-directory should be created. A folder should be created for each item, and should be stored in this new sub-directory. The name of the folder should be equal to the item code. All the images that are in this sub-directory will be displayed in the widget. The first tab always contains the image that was linked in Exact Globe Next.
- **Image width:** Type the width for the picture of this widget in pixels. If this is left blank, the standard width of the image will be used or the width will be calculated based on the defined height.
- **Image height:** Type the height for the picture of this widget in pixels. If this is left blank, the standard height of the image will be used or the height will be calculated based on the defined width.
- **View full size:** Type the label to hyperlink to the full sized image once the hyperlink is clicked. This label will be displayed below the image. Type the term ID in the next box.

The following example displays an image linked in Exact Globe Next on tab **1**:

The following example displays another image in sub-directory on tab **2**:

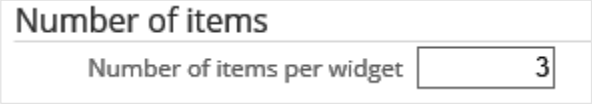
Items most sold widget

This widget displays the top number (this number can be defined) of items (sales items) that were sold in the entire sales order history that is available in the Exact Globe Next database. This is based on the number of times an item was sold and not on the total quantity of items sold.

This widget can be used on the following pages:

- Catalog
- Item

The specific widget setting in the following should be defined:



- **Number of items per widget:** Type the number of items most sold that you want to display on the portal.

The following in an example:

Item name widget

This widget will display the item code and description in the preferred language. In Exact Globe Next, a maximum of five different languages can be defined. If another language is selected on the portal, the default language description will be displayed.

This widget can be used on the following pages:

- CatalogItem
- Item
- Variant

The specific widget settings in the following should be defined:

- **Appearance:** Select **Item code**, **Item description**, or **Item code and description** as the type of appearance to be displayed for the widget on the portal.
- **Separator:** Type the separator to be displayed between the item code and description.

The following is an example:

Item Net price widget

This widget will display the price that the visitor has to pay for a specific item. This price is calculated based on the sales price, the price list, or the price agreement in the correct currency. The price list and price agreement only apply for authenticated visitors. This price will be equal to the net price that is calculated during the sales order entry in Exact Globe Next.

This widget can be used on the following pages:

- CatalogItem
- Item

The specific widget settings in the following should be defined:

- **Title label + Term ID:** Type the label or name and the term ID for the widget at the **Title label** and **Term ID** fields.
- **Show currency field:** Select this check box to display the currency symbol next to the price.
- **Label placement:** Select **Right**, **Left**, **Above**, or **Under** as the position of the label to be displayed around the price.

The following is an example:

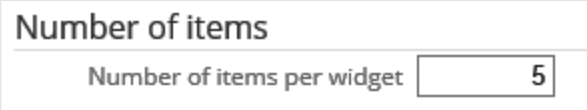
Item other people also bought widget

This widget displays the top number (the number can be defined) of items (sales items) that were also sold in the same sales orders where the selected item was in. This is based on the number of total quantity of items sold. The quantity is calculated from the entire sales order history that is in the Exact Globe Next database.

This widget can be used on the following page:

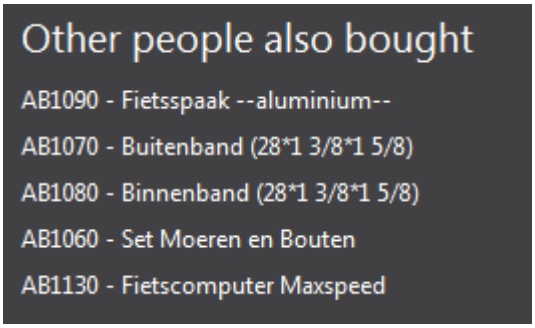
- Item

The specific widget setting in the following should be defined:



- **Number of items per widget:** Type the number of items that you want to display as the top (most) sales items sold.

The following is an example:



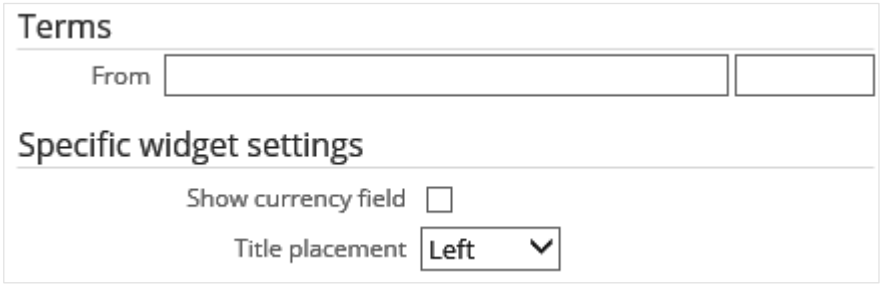
Item price list widget

The **Item price list** widget will display the price list or price agreement as maintained in Exact Globe Next for the selected item for the authenticated visitor.

This widget can be used on the following pages:

- CatalogItem (Authenticated)
- Item (Authenticated)

The specific widget settings in the following should be defined:



- Under the **Terms** section, type the label for **From** and the term ID in the next box.
- Under the **Specific widget settings** section, select the **Show currency field** check box to display the currency symbol in front of the price.
- At **Title placement**, select **Left**, **Right**, **Above**, or **Under** as the position of the title to be displayed around the price.

The following is an example:

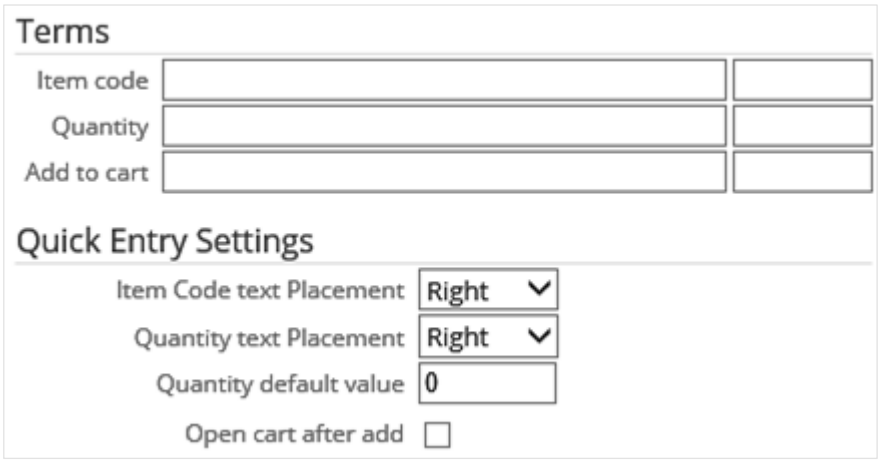
Item quick entry widget

The **Item quick entry** widget enables the authenticated visitor to quickly add items to the shopping cart from the **Master** page.

This widget can be used on the following page:

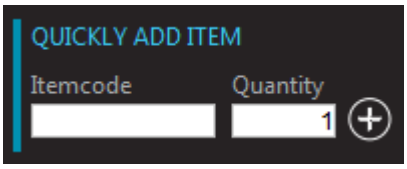
- Master

The specific widget settings in the following should be defined:



- Under the **Terms** section, type the labels or names at **Item code**, **Quantity**, and **Add to cart**. Type the term IDs in the boxes next to the respective fields.
- Under the **Quick Entry Settings** section at **Item Code text Placement** and **Quantity text Placement**, select **Left**, **Right**, **Above**, or **Under** as the position of the text to be displayed around the **Item code** and **Quantity** fields.
- At **Quantity default value**, type the default quantity that should be displayed at the **Quantity** field.
- Select the **Open cart after add** check box to enable the shopping cart to be opened automatically after an item is added via this widget.

The following is an example:



Item Sales price widget

This widget will display the standard sales price for the selected item. This price is maintained in Exact Globe Next. For authenticated visitors whose currency differs from the default currency, the price will be calculated in the correct currency, based on the exchange rate in Exact Globe Next.

This widget can be used on the following pages:

- CatalogItem
- Item

The specific widget settings in the following should be defined:

- **Title label + Term ID:** Type the label or name for the widget to be displayed on the portal at **Title label**. Type the term ID in the next box.
- **Show currency field:** Select this check box to display the currency field in the widget.
- **Label placement:** Select **Right**, **Left**, **Above**, or **Under** as the position of the label to be displayed around the price.

The following is an example:

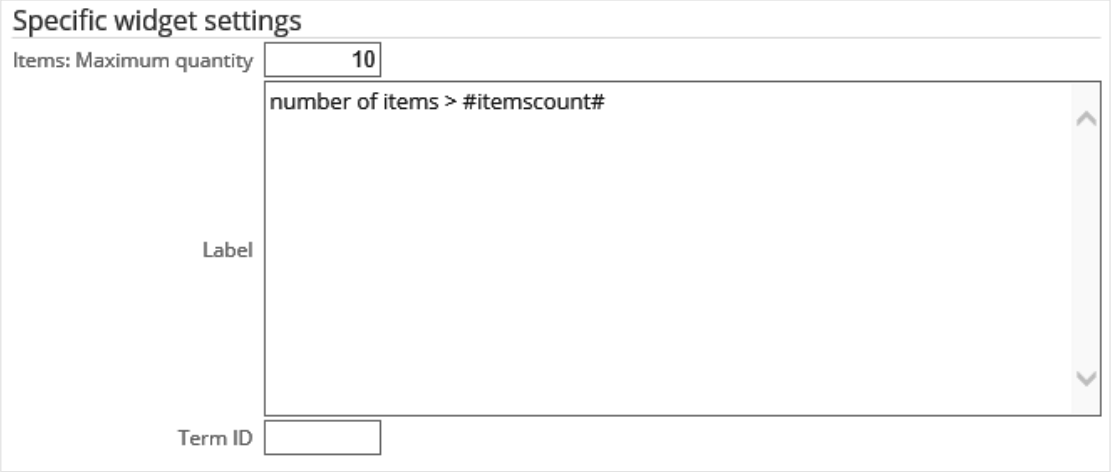
Number of items (or ItemsCount) widget

The **Number of items (ItemsCount)** widget will display the number of items that belong to an assortment, taking the item selection into account.

This widget can be used on the following page:

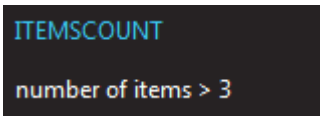
- AssortmentCard

The specific widget settings in the following should be defined:



- **Items: Maximum quantity:** Type the maximum quantity for the items within the assortment. The B2B E-Commerce Portal will count the items within the assortment up to this quantity. The default value is **10**. The number of quantity has a direct impact on the performance of this widget. The higher the quantity, the lower the performance.
- **Label:** Type the label or text to be displayed in the widget. Use **#itemscount#** to position the quantity in the label.
- **Term ID:** Type the term ID for the label at **Label**.

The following is an example:



Item stock widget

The **Item stock** widget will display stock information for the selected item. The stock is calculated in real-time from Exact Globe Next. The widget can either display a quantity or an indication, such as “Available” or “Not available”.

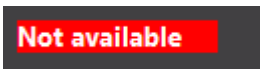
This widget can be used on the following pages:

- CatalogItem
- Item

The specific widget settings in the following should be defined:

- **Title label + Term ID:** Type the label or text that will be displayed next to the stock quantity or indication. Type the term ID in the next box.
- **Title placement:** Select **Left**, **Right**, **Above**, or **Under** as the position of the title to be displayed around the stock.
- **Warehouse:** Select the warehouse (from Exact Globe Next) that contains the stock to be calculated. If ***** is selected, the total stock of all warehouses will be calculated.
- **Calculation method:** Select one of the following methods to calculate the stock:
  - **Free:** This option refers to the free stock, whereby the amount equals to the available stock with the allocated stock excluded.
  - **Available:** This option refers to the available stock, which is the stock balance after taking into account the stock allocation from the purchase and sales orders. The calculation is as follows: stock + purchase order - sales order.
  - **Available to promise:** This option refers to the available to promise stock, whereby the amount equals to the free stock with the to-be-received stock excluded.
- **Display:** Select one of the following options to display the stock calculation results:
  - **Quantity:** Select this option to display the quantity calculated.
  - **Availability:** Select this option to display an indication such as “Available” or “Not available”. You can set a different background color for each indication.
- **Availability (Width):** Define the width for the indication to be displayed in the widget and select the unit of measurement for the value, either **pixel** or **percentage**. You can leave this field blank if you want to define the width directly in the style sheet.

The following examples display the results of different stock calculation options and presentations.



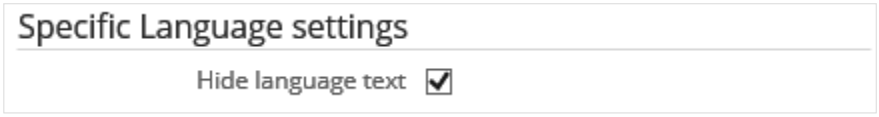
Language widget

The **Language** widget enables the visitor to select his or her choice of language. The languages that can be selected can be maintained on the portal settings. The selected language will be displayed with a dotted border around its designated icon.

This widget can be used on the following page:

- Master

The specific widget setting in the following should be defined:



- **Hide language text:** Select this check box to hide both the flag and text for each language from view.

The following is an example:

Login widget

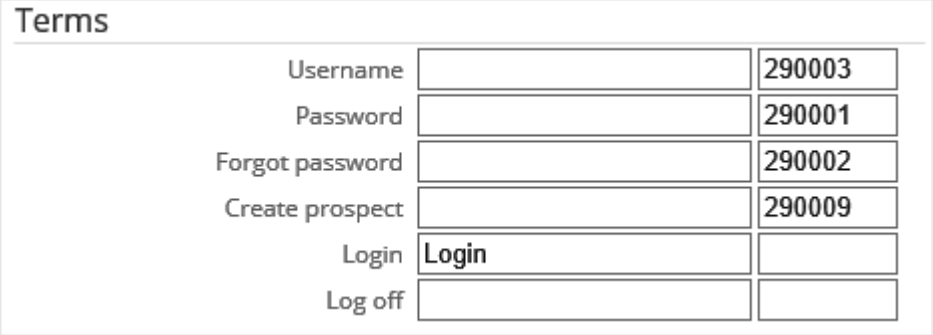
The **Login** widget has two purposes. On the **Master** page of an anonymous visitor, it will display login fields. On the **Master** page of the authenticated user, it will display data about the visitor and a logout option.

This widget can be used on the following pages:

- Master
- Login

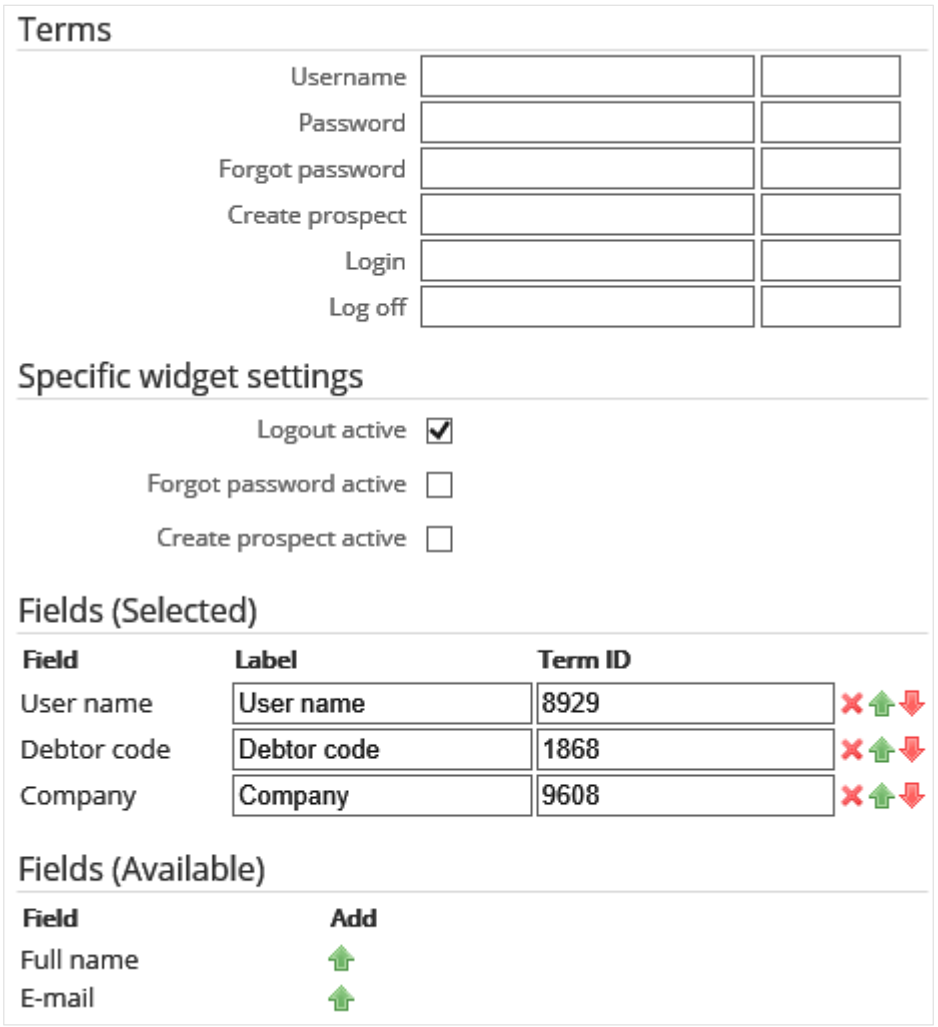
The specific widget settings in the following should be defined:

Not logged in (on the Master page - Anonymous)



- **Username:** Type the label or name to be displayed for the **Username** field on the portal. Type the term ID in the next box or use the default term ID displayed here.
- **Password:** Type the label or name to be displayed for the **Password** field on the portal. Type the term ID in the next box or use the default term ID displayed here.
- **Forgot password:** Type the label or name to be displayed for the **Forgot Password** link on the portal. Type the term ID in the next box or use the default term ID displayed here.
- **Create prospect:** Type the label or name to be displayed for the **Create prospect** link on the portal. Type the term ID in the next box or use the default term ID displayed here.
- **Login:** Type the label or name to be displayed for the **Login** button on the portal. Type the term ID in the next box or use the default term ID displayed here.
- **Log off:** Type the label or name to be displayed for the **Log off** button on the portal. Type the term ID in the next box.

Logged in (on the Master page - Authenticated)

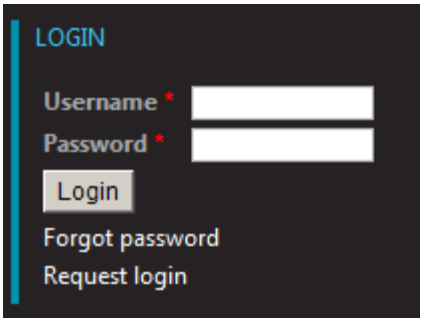


- Under the **Terms** section, type the labels or names to be displayed for the **Username** field, **Password** field, **Forgot password** link, **Create prospect** link, **Login** button, and **Log off** button on the portal. Type the term IDs in the boxes next to the respective fields, links, and buttons or use the default term IDs displayed here.
- Under the **Specific widget settings** section, select the following check boxes:
  - **Logout active:** Select this check box to enable the **Logout** button on the portal. By default, this option is enabled.
  - **Forgot password active:** Select this check box to enable the **Forgot password** link on the portal.
  - **Create prospect active**: Select this check box to enable the **Create prospect** link on the portal.

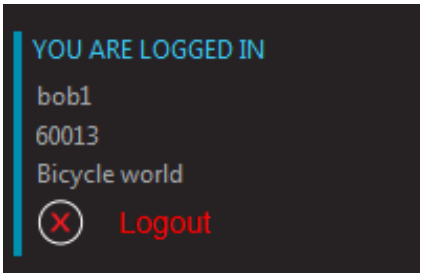
The ECP administrator can choose to display a number of fields in the widget that contain information about the authenticated visitor. The fields which are displayed under the **Fields (Selected)** section can be selected by clicking the icon in the **Add** column next to the fields under the **Fields (Available)** section. You can define the label and the term ID for each selected field if applicable, or click icon to remove the fields. You can also click the icon or the icon to move the fields according to sequence that you want to be displayed on the portal.

The following is an example:

Not logged in



Logged in



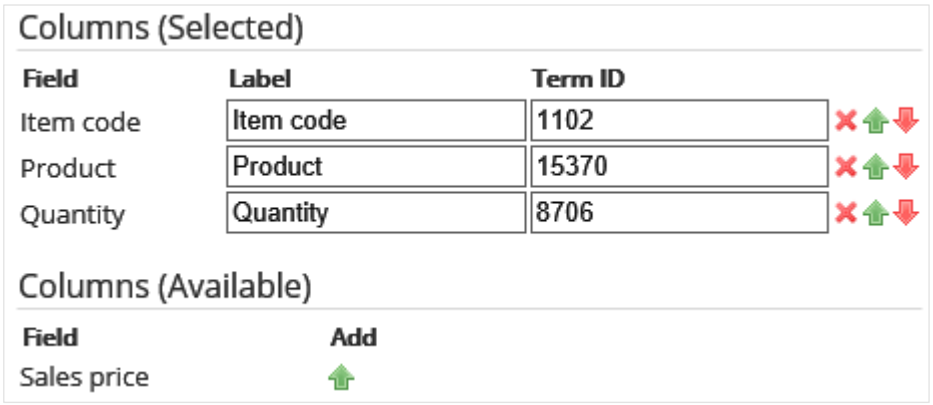
Mandatory items widget

This widget will display all the items that are defined as mandatory for the selected item in Exact Globe Next (**Variant** functionality).

This widget can be used on the following page:

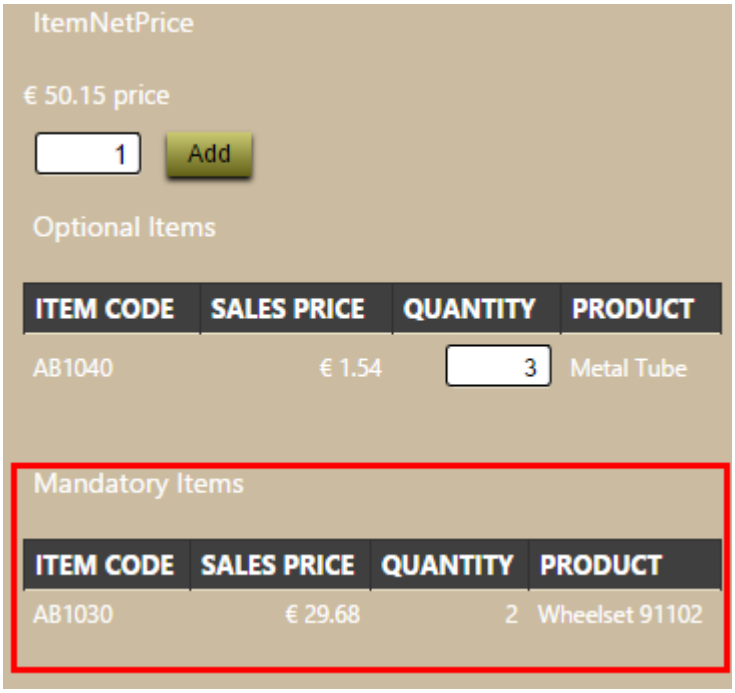
- Item

The specific widget settings in the following should be defined:



- **Columns (Selected):** This section displays the fields to be displayed as columns in the widget on the portal. Once added from the **Columns (Available)** section, you can define the label and the term ID for each selected field if applicable, or click the **Delete** icon to remove the fields, or click the icon or the icon to move the fields according to sequence that you want to be displayed on the portal.
- **Columns (Available):** This section contains the fields which can be added to the **Columns (Selected)** section by clicking the icon.

The following is an example:



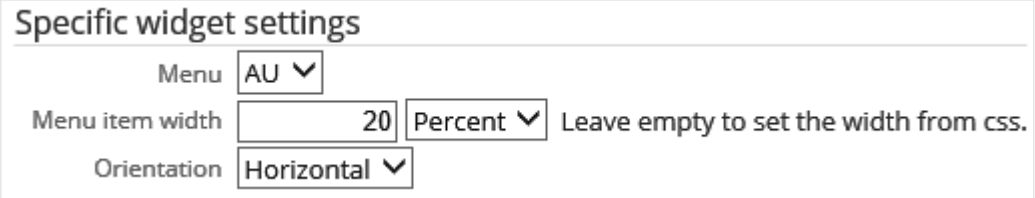
Menu widget

The **Menu** widget displays a menu that was created with the menu builder (portal settings) somewhere on the **Master** page.

This widget can be used on the following page:

- Master

The specific widget settings in the following should be defined:



- **Menu:** Select an option for the menu to be created with the menu builder (portal settings). Select **Main menu**, **Anonymous**, or **Authenticated**.
- **Menu item width:** Define the width for the indication to be displayed in the widget and select the unit of measurement for the value, either **Pixels** or **Percent**. You can leave this field blank if you want to define the width directly in the style sheet.
- **Orientation:** Select either **Horizontal** or **Vertical** to display the menu.

The following is an example:

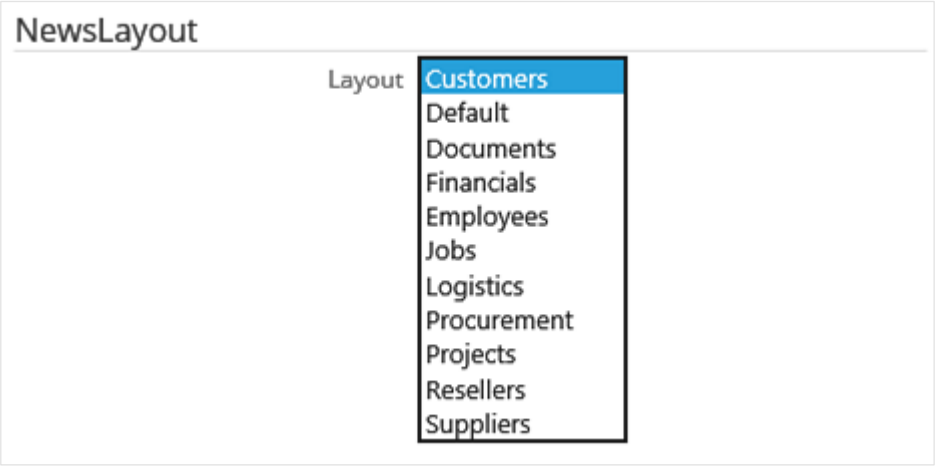
News widget

The **News** widget displays documents from Exact Synergy Enterprise with the news layout as maintained in Exact Synergy Enterprise.

This widget can be used on the following pages:

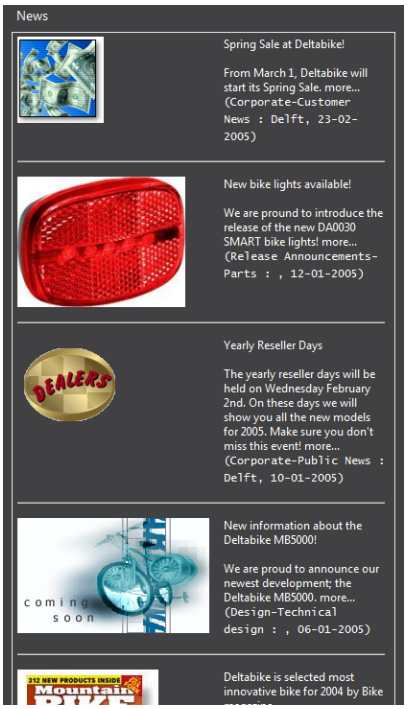
- Home
- Custom pages

The specific widget setting in the following should be defined:



Select one of the news layouts that are available in Exact Synergy Enterprise.

The following is an example:



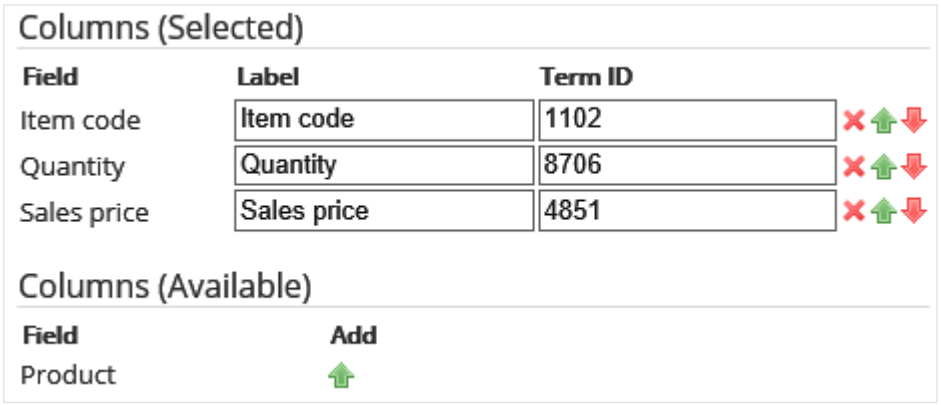
One of set widget

This widget will display all the items that are defined as **One of set** for the selected item in Exact Globe Next (**Variant** functionality).

This widget can be used on the following page:

- Variant

The specific widget settings in the following should be defined:



- **Columns (Selected):** This section displays the fields to be displayed as columns in the widget on the portal. Once added from the **Columns (Available)** section, you can define the label and the term ID for each selected field if applicable, or click the **Delete** icon to remove the fields, or click the icon or the icon to move the fields according to sequence that you want to be displayed on the portal.
- **Columns (Available):** This section contains the fields which can be added to the **Columns (Selected)** section by clicking the icon.

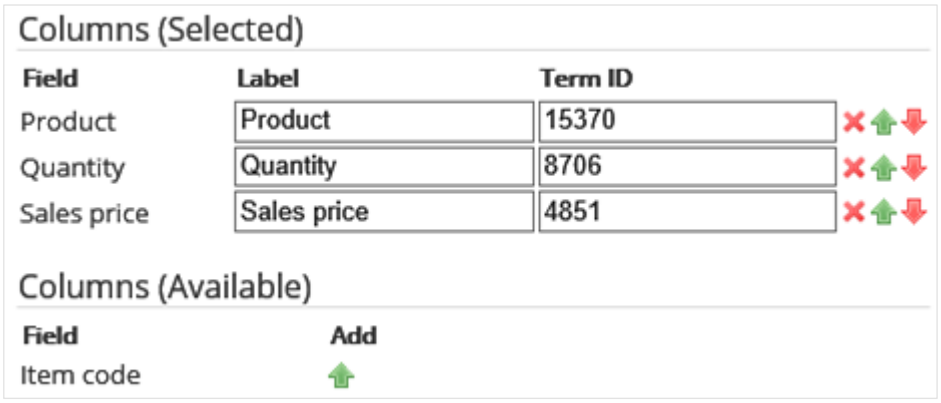
One or none widget

This widget will display all the items that are defined as **One or none** for the selected item in Exact Globe Next (**Variant** functionality).

This widget can be used on the following page:

- Variant

The specific widget settings in the following should be defined:



- **Columns (Selected):** This section displays the fields to be displayed as columns in the widget on the portal. Once added from the **Columns (Available)** section, you can define the label and the term ID for each selected field if applicable, or click the **Delete** icon to remove the fields, or click the icon or the icon to move the fields according to sequence that you want to be displayed on the portal.
- **Columns (Available):** This section contains the fields which can be added to the **Columns (Selected)** section by clicking the icon.

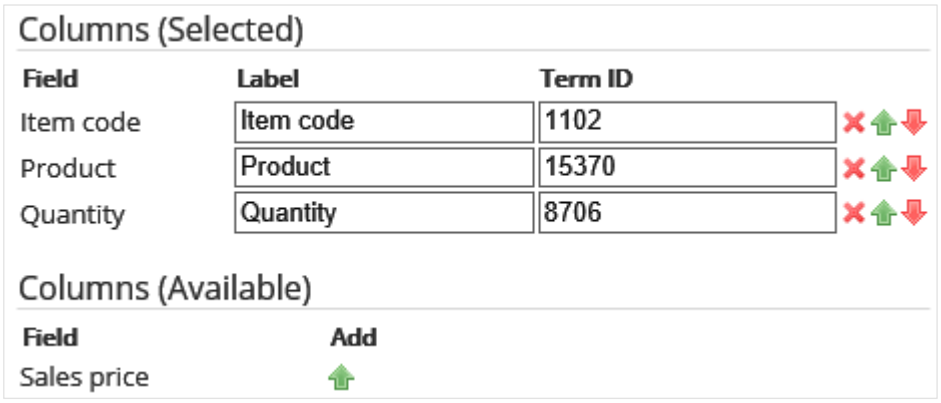
Optional items widget

This widget will display all the items that are defined as **Optional** for the selected item in Exact Globe Next (**Variant** functionality).

This widget can be used on the following page:

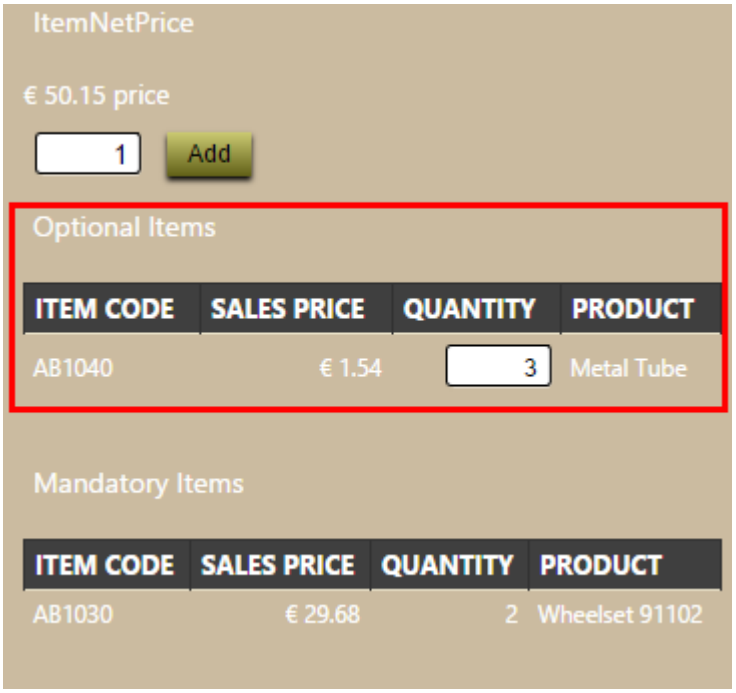
- Item

The specific widget settings in the following should be defined:



- **Columns (Selected):** This section displays the fields to be displayed as columns in the widget on the portal. Once added from the **Columns (Available)** section, you can define the label and the term ID for each selected field if applicable, or click the icon to remove the fields, or click the icon or the icon to move the fields according to sequence that you want to be displayed on the portal.
- **Columns (Available):** This section contains the fields which can be added to the **Columns (Selected)** section by clicking the icon.

The following is an example:



Order widget

This widget can be added to the **Order** page to display order line information for the authenticated visitors.

When the authenticated users access the **Order** widget via the **Order List** hyperlink (the **OrderInvoiceList** page) to view their order information on the B2B E-Commerce Portals, the order information displayed is grouped in three different tabs:

- Order
- Order history
- Back order

You can customize what information you want to display in each tab by defining settings for the **Order** widget.

This widget can be used on the following pages:

- Order (Authenticated)
- OrderInvoiceList (Authenticated)

The specific widget settings in the following should be defined:

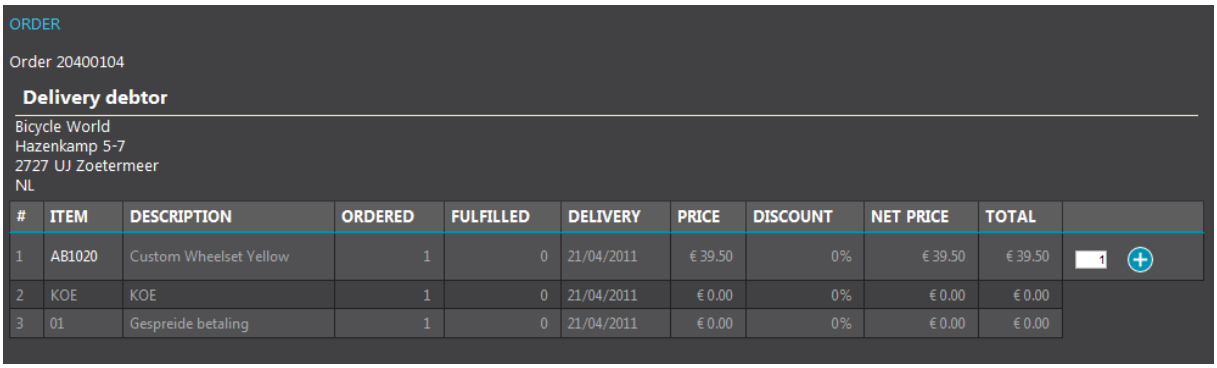
- **Hide payment conditions**: Select this check box to hide the payment conditions in the **Order** widget on the portal.

The **Selected fields for Order**, **Selected fields for Order History**, and **Selected fields for Back Order** sections display the fields selected from the **Available fields for Order**, **Available fields for Order History**, and **Available fields for Back Order** sections respectively. Once added, you can define the label and the term ID at **Label** and **Term ID** for each selected field, if applicable. Click ✖ to remove the fields, or click ⬆ or ⬇ to move the fields according to the sequence that you want to be displayed on the portal.

The **Available fields for Order**, **Available fields for Order History**, and **Available fields for Back Order** sections display all the field options available that you can display under each tab for the **Order** widget on the portal. Select the required fields by clicking the ⬆ icon in the **Add to search** column next to the fields in the **Available Fields** column. The selected fields will be displayed under the corresponding sections, which are the **Selected fields for Order**, **Selected fields for Order History**, and **Selected fields for Back Order** sections.

Note:
The Attachment field can only be added to the Selected fields for Order History section. It enables any attachments in the order generated in Exact Globe Next to be viewed and downloaded from the B2B E-Commerce Portals. If an attachment exists, the Attachment icon will be displayed under the Attachment column on the portals. Click the Attachment icon. You can view the document by clicking the attachment hyperlink, or click the icon to download it.

The following is an example of the **Order** widget accessed via the **Order** page on the portal:


ORDER

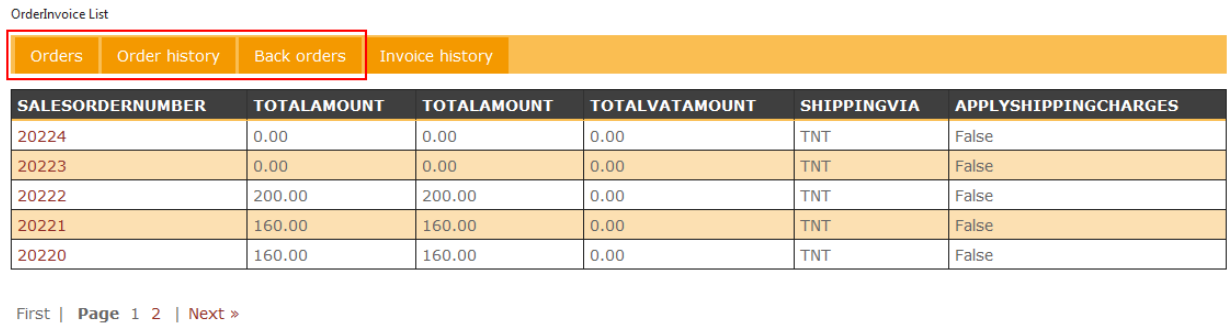
Order 20400104

Delivery debtor

Bicycle World
Hazenkamp 5-7
2727 UJ Zoetermeer
NL

#	ITEM	DESCRIPTION	ORDERED	FULFILLED	DELIVERY	PRICE	DISCOUNT	NET PRICE	TOTAL	
1	AB1020	Custom Wheelset Yellow	1	0	21/04/2011	€ 39.50	0%	€ 39.50	€ 39.50	1
2	KOE	KOE	1	0	21/04/2011	€ 0.00	0%	€ 0.00	€ 0.00	
3	01	Gespreide betaling	1	0	21/04/2011	€ 0.00	0%	€ 0.00	€ 0.00	

The following is an example of the **Order** widget accessed via the **OrderInvoiceList** page on the portal:


OrderInvoice List

Orders | Order history | Back orders | Invoice history

SALESORDERNUMBER	TOTALAMOUNT	TOTALAMOUNT	TOTALVATAMOUNT	SHIPPINGVIA	APPLYSHIPPINGCHARGES
20224	0.00	0.00	0.00	TNT	False
20223	0.00	0.00	0.00	TNT	False
20222	200.00	200.00	0.00	TNT	False
20221	160.00	160.00	0.00	TNT	False
20220	160.00	160.00	0.00	TNT	False

First | **Page** 1 2 | Next »

Order invoice detail widget

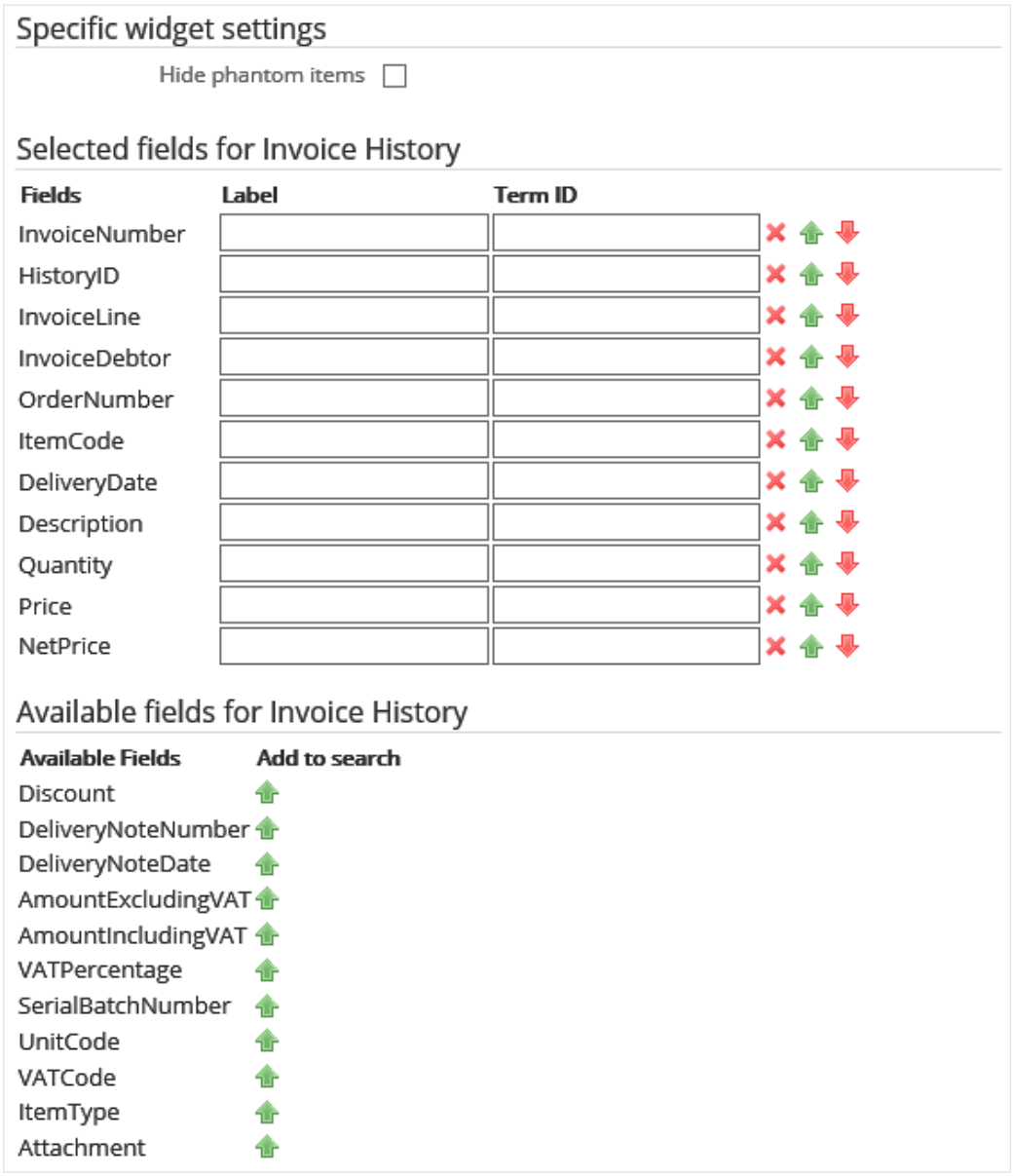
This widget can be added to the **OrderInvoiceDetail** page to display the invoice line information for the authenticated visitors.

When the authenticated users access the **Order invoice detail** widget via the **Order List** hyperlink (the **OrderInvoiceList** page) to view their order information on the B2B E-Commerce Portals, the order invoice detail information is displayed in the **Invoice history** tab. You can customize what information you want to display in this tab by defining settings for the **Order invoice detail** widget.

This widget can be used on the following pages:

- OrderInvoiceDetail (Authenticated)
- OrderInvoiceList (Authenticated)

The specific widget settings in the following should be defined:



- **Hide phantom items:** Select this check box to exclude the phantom items from being displayed on the portal.

The **Selected fields for Invoice History** section displays the fields selected from the **Available fields for Invoice History** section. Once added, you can define the label and the term ID at **Label** and **Term ID** for each selected field, if applicable. Click to remove the fields, or click or to move the fields according to the sequence that you want to be displayed on the portal.

The **Available fields for Invoice History** section displays all the field options available that you can display under the **Invoice History** tab for the **Order invoice detail** widget on the portal. Select the required fields by clicking the icon in the **Add to search** column next to the fields in the **Available Fields** column. The selected fields will be displayed in the **Selected fields for Invoice History** section.

Note:
The Attachment field can be added to the Selected fields for Invoice History section. It enables any attachments in the invoice generated in Exact Globe Next to be viewed and downloaded from the B2B E-Commerce Portals. If an attachment exists, the Attachment icon will be displayed in the Attachment column on the portals. Click the Attachment icon. You can view the document by clicking the attachment hyperlink, or click the icon to download it.

The following is an example of the **Order invoice detail** widget accessed via the **OrderInvoiceList** page on the portal:

OrderInvoice List

Orders | Order history | Back orders | Invoice history

INVOICE #	ORDER #	DELIVERY	DELIVERYNOTENUMBER	AMOUNTEXCLUDINGVAT	AMOUNTINCLUDINGVAT
13700004	20230	31/07/2013	10008	€ 400.00	€ 424.00

First | **Page** 1

Order invoice list widget

This widget can be added to the **OrderInvoiceList** page to display order and invoice header information for the authenticated visitors. Four tabs will be displayed to the authenticated users. The tabs are:

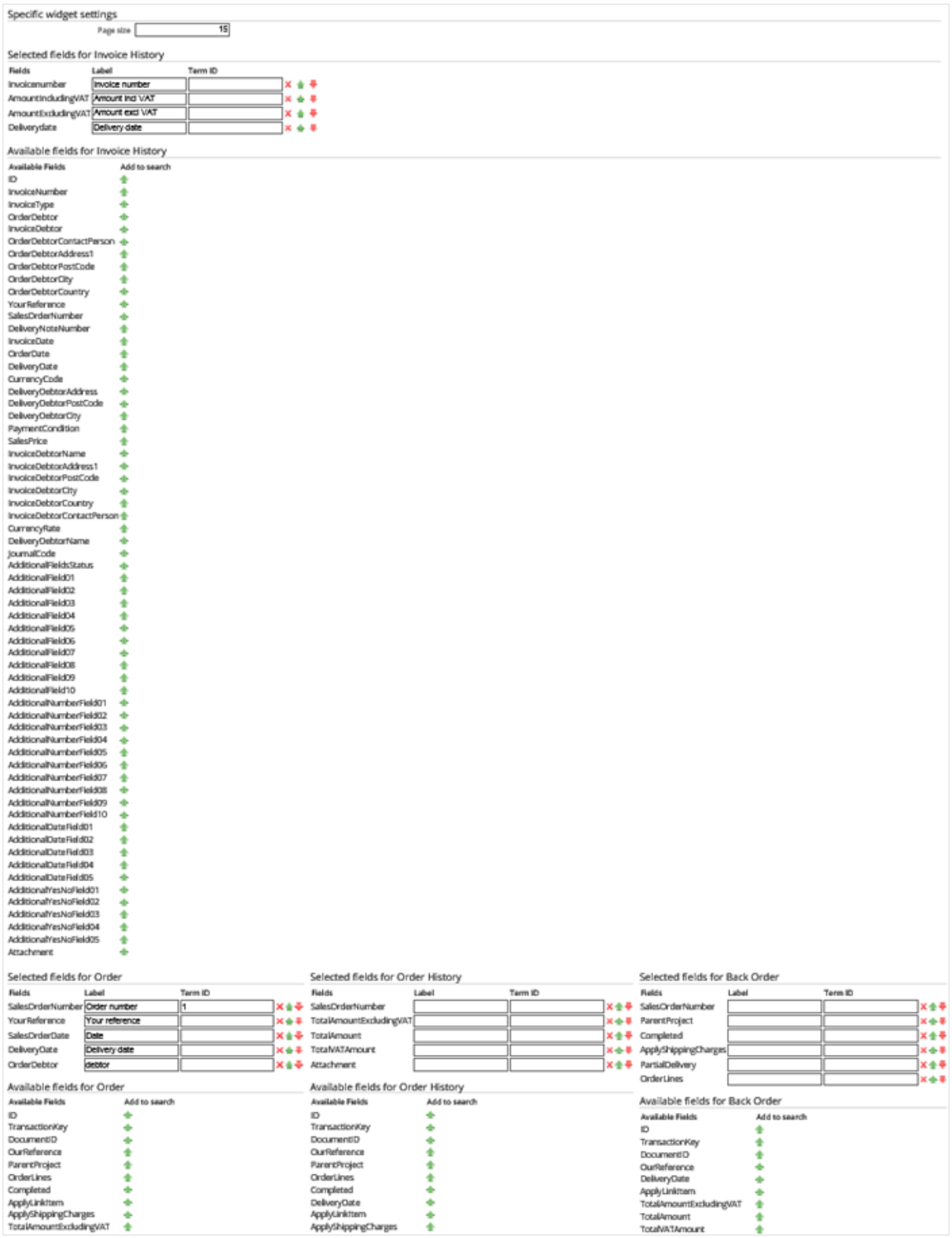
- Orders
- Order history
- Back orders
- Invoice history

Under each tab, you can decide which fields to be displayed on your portals.

This widget can be used on the following page:

- OrderInvoiceList

The specific widget settings in the following should be defined:



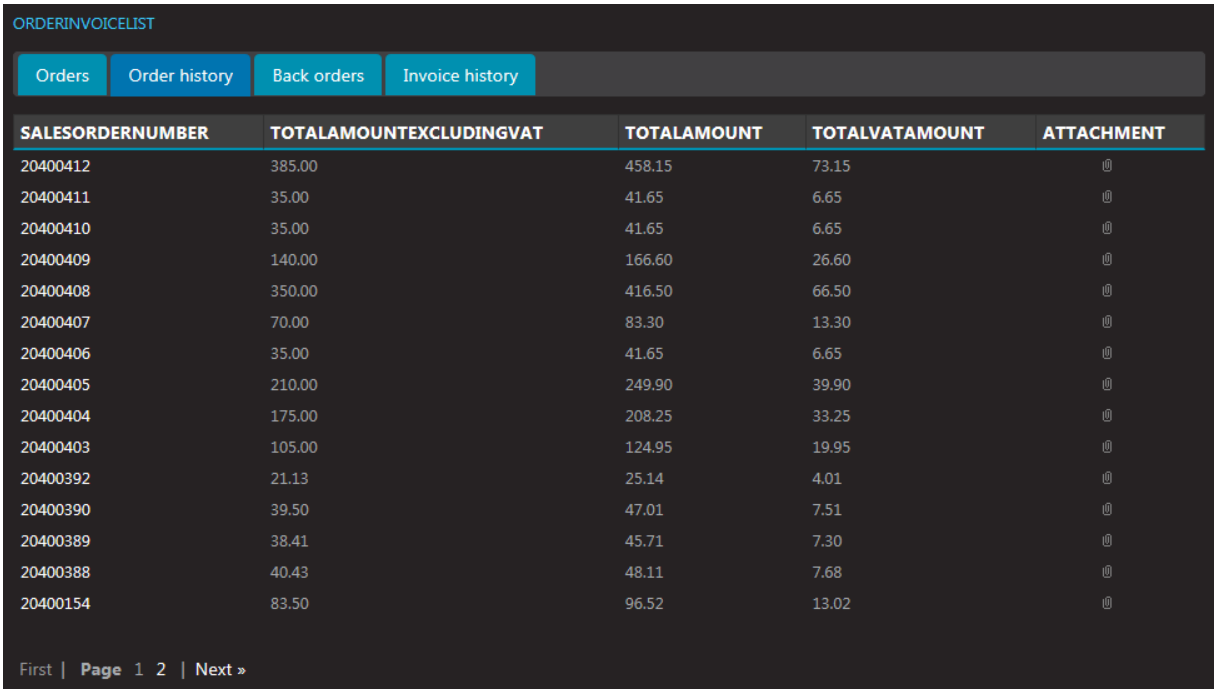
- **Page size:** Type the number of records or rows to be displayed on the page.

The fields under the **Selected fields for Order** section, **Selected fields for Order History** section, **Selected fields for Back Order** section, and **Selected fields for Invoice History** section display the fields which can be selected by clicking the icon in the **Add to search** columns next to the available fields under the **Available fields for Order** section, **Available fields for Order History** section, **Available fields for Back Order** section, and **Available fields for Invoice History** section respectively.

Once added, you can define the label and the term ID for each selected field, if applicable, or click the icon to remove the fields, or click the icon or the icon to move the fields according to sequence that you want to be displayed on the portal.

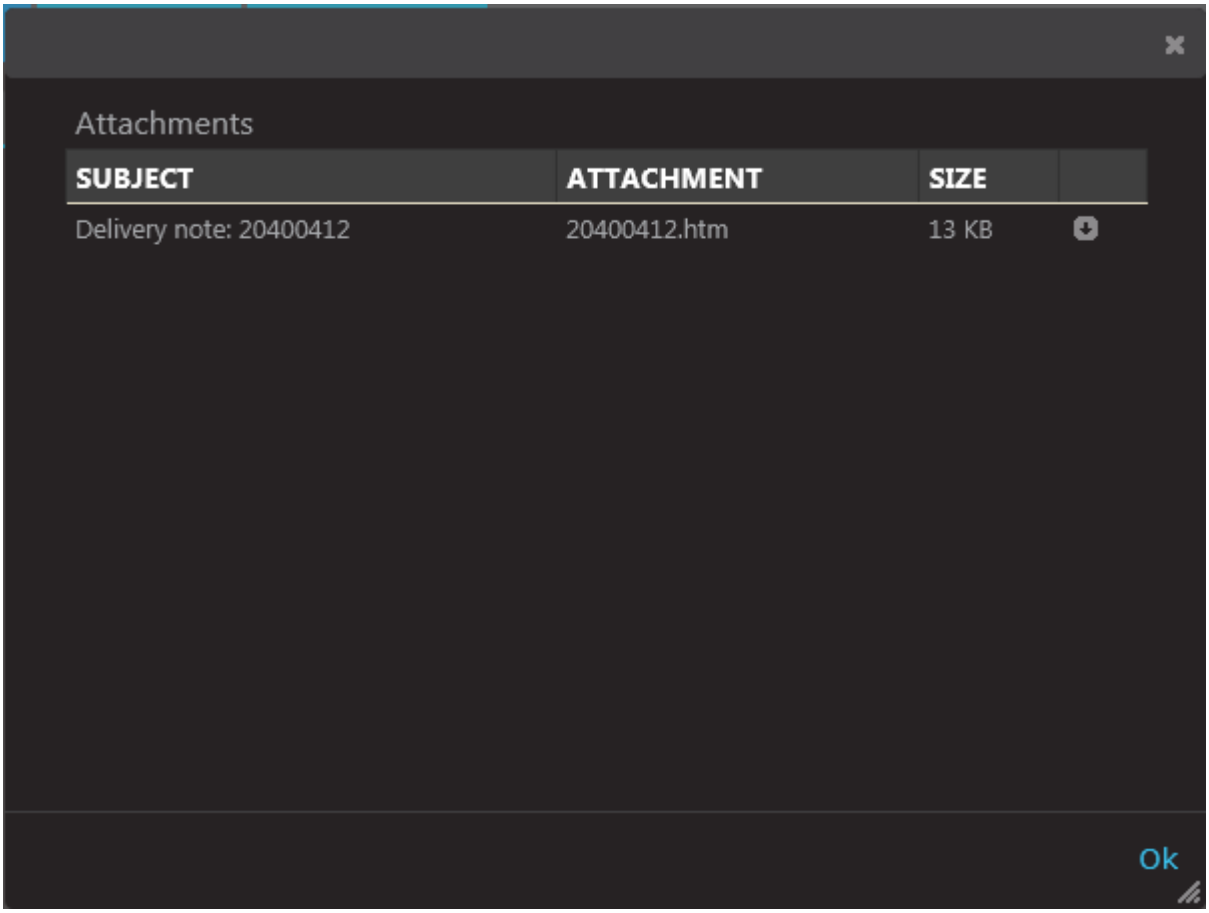
Tip:
The **Attachment** field can only be added to the **Selected fields for Invoice History** section and the **Selected fields for Order History** section. It enables any attachments in the order or invoice in Exact Globe Next to be viewed and downloaded in portals.

The following example shows the **Order invoice list** widget with the four tabs (**Orders**, **Order history**, **Back orders**, and **Invoice history**).



The **Attachment** column under the **Order history** tab and **Invoice history** tab enables any attachments in the order or invoice in Exact Globe Next to be displayed in the B2B E-Commerce Portals. If an attachment exists,
the **Attachment** icon will be displayed.

Once clicked, a page will be displayed with all the applicable attachments, as shown in the following. These attachments can be viewed or downloaded.


Attachments
SUBJECT
ATTACHMENT
SIZE
Delivery note: 20400412
20400412.htm
13 KB
Ok

Order total widget

The **Order total** widget displays the summary of the sales order, such as the total cost of the items in the order, delivery cost, total amount including or excluding VAT, et cetera.

This widget can be used on the following pages:

- Cart
- Confirmation
- Order (Authenticated)

Each page may have different fields displayed, as listed in the following:

The **Cart** page:

- CartTotal

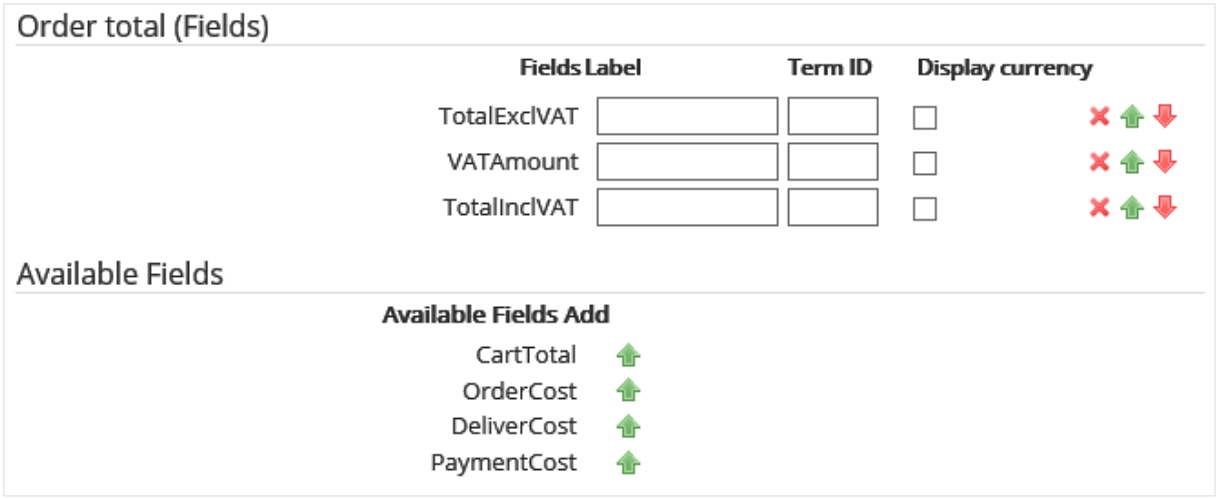
The **Confirmation** page:

- CartTotal
- OrderCosts
- DeliveryCosts
- PaymentCosts (not implemented yet)
- TotalExclVAT (refers to Total excluding VAT)

The **Order** page:

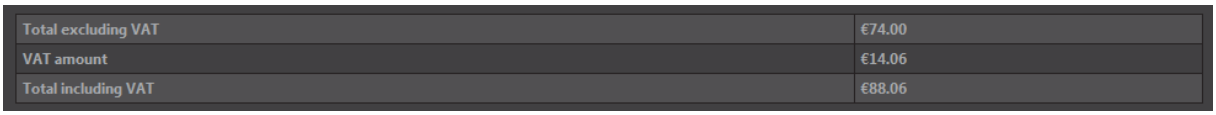
- CartTotal
- OrderCosts
- DeliveryCosts
- PaymentCosts (not implemented yet)
- TotalExclVAT (refers to Total excluding VAT)
- VATAmount
- TotalInclVAT (refers to Total including VAT)

The following example displays the **Specific widget settings** of the widget on the **Order** page (Authenticated).



- **Order total (Fields):** This section displays the fields to be displayed in the widget on the portal. Once added from the **Available Fields** section, you can define the label and the term ID for each selected field if applicable, or click the icon to remove the fields, or click the icon or the icon to move the fields according to sequence that you want to be displayed on the portal.
- **Available Fields:** This section contains the fields which can be added to the **Order total (Fields)** section by clicking the icon.

The following is an example:



Payment method widget

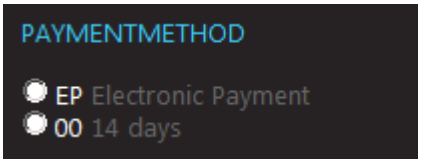
This widget displays the possible payment methods. If electronic payment is implemented, the visitor or user can either select from the electronic payment methods available or select the default payment method set at the **Account** level in Exact Synergy Enterprise.

This widget can be used on the following pages:

- Delivery (Authenticated)
- Confirmation

Note:
There are no specific settings for this widget.

The following is an example:



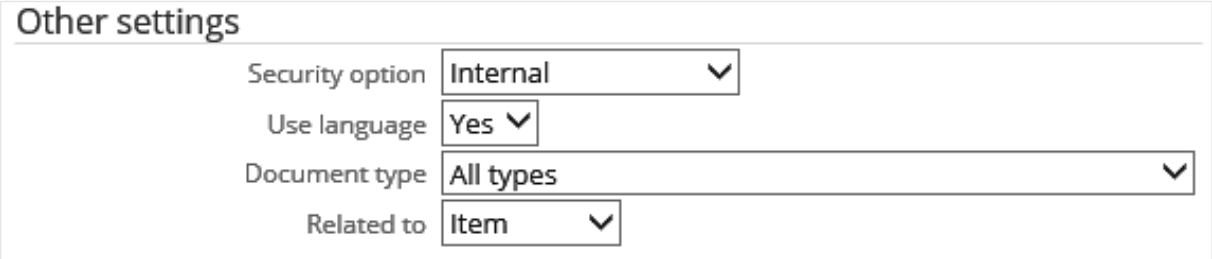
Related documents widget

The **Related documents** widgets will display a list of documents that are either attached to the active customer or to the active item. This also includes attachments.

This widget can be used on the following pages:

- Account (Authenticated)
- Item

The specific widget settings in the following should be defined:



- **Security option:** Select one of the following security options of the documents in Exact Synergy Enterprise:
  - **All –** Select this to option display a list of documents that are attached to the active item.
  - **Customers –** Select this option to display a list of documents that are attached to all active customers.
  - **Partners –** Select this option to display a list of documents that are attached to all active partners.
  - **Customers (Specific) –** Select this option to display a list of documents that are attached to specific active customers.
  - **Partners (Specific) –** Select this option to display a list of documents that are attached to specific active partners.
  - **Internal –** Select this option to display a list of documents that are attached to internal users or staff.
- **Use language:** Select one of the options to display either documents with the same language as the active language only, or documents in any language.
- **Document type:** Select the type of documents to be displayed. This can either be one type or all types.
- **Related to:** Select one of the following options which the documents are associated with:
  - Customer
  - Item

The following is an example:

Related items widget

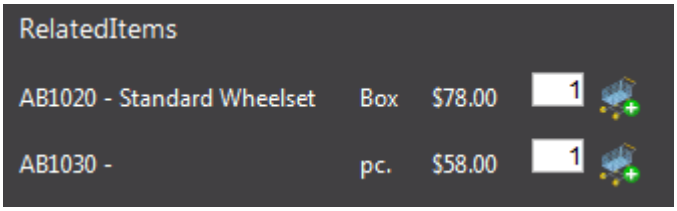
This widget displays all the items that are defined as replacements for the selected item in Exact Globe Next.

This widget can be used on the following page:

- Item

Note:
There are no specific settings for this widget.

The following is an example:



Remarks widget

The **Remarks** widget can be used by a visitor or user to add remarks to a sales order or an information request.

This widget can be used on the following pages:

- Delivery
- Confirmation
- RequestInfo

Note:
There are no specific settings for this widget.

The following is an example:

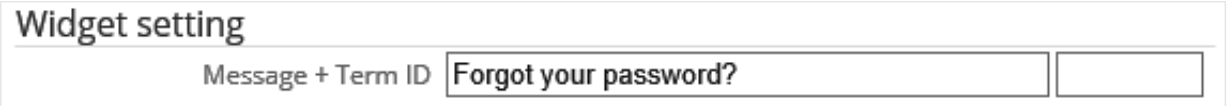
Reset password widget

The **Reset password** widget can be used by the visitor or user to reset his or her password. This is required when the visitor is not logged in (forgot password) or when an authenticated visitor wants to reset the password. The visitor has to enter a valid e-mail address. With the e-mail address provided, the system will search for the associated username in Exact Synergy Enterprise, and then reset the password. If a mail merge document is linked to the widget, a mail can be send to the user for notification.

This widget can be used on the following page:

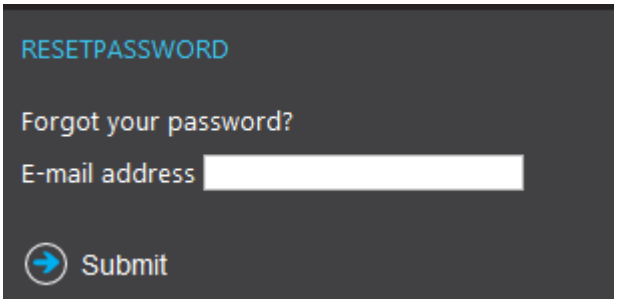
- ResetPassword

The specific widget setting in the following should be defined:



- **Message + Term ID:** Type the label or text that you want to display in the widget. Type the term ID in the next box.

The following is an example:



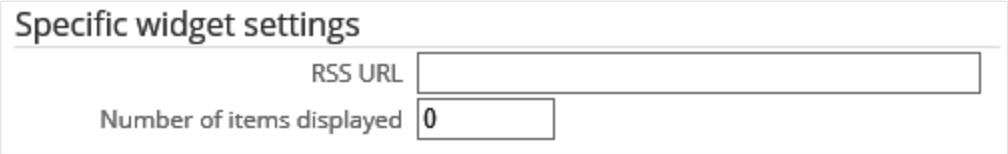
RSS feed widget

The **RSS feed** widget displays RSS feed headers from the selected websites on the **Master** page.

This widget can be used on the following page:

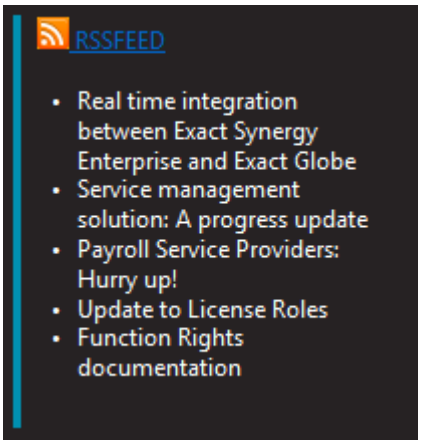
- Master

The specific widget settings in the following should be defined:



- **RSS URL:** Type the URL of the RSS site.
- **Number of items displayed:** Type the number of RSS items to be displayed in the widget.

The following is an example:



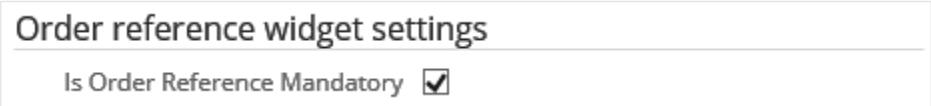
Sales order reference widget

The **Sales order reference** (or **OrderReference**) widget enables the authenticated visitor to define a reference for the sales order on the **Delivery** page.

This widget can be used on the following pages:

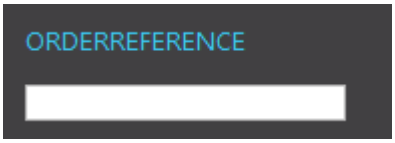
- Delivery
- Confirmation (read only)

The specific widget setting in the following should be defined:



- **Is Order Reference Mandatory:** Select this check box to enable the visitor or user to define a reference for each cart that is being checked out.

The following is an example:



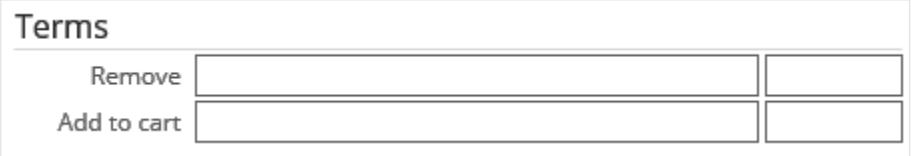
Saved cart list widget

This widget displays the saved carts for the visitor or user. It can also display all the saved carts for the linked account if the visitor or user has the rights for that. A reseller can view all the saved carts for all the linked accounts, and the same applies to an employee that is logged on to the portal. It is possible to view the details in this widget. It is also possible to add the entire saved cart to the current cart.

This widget can be used on the following pages:

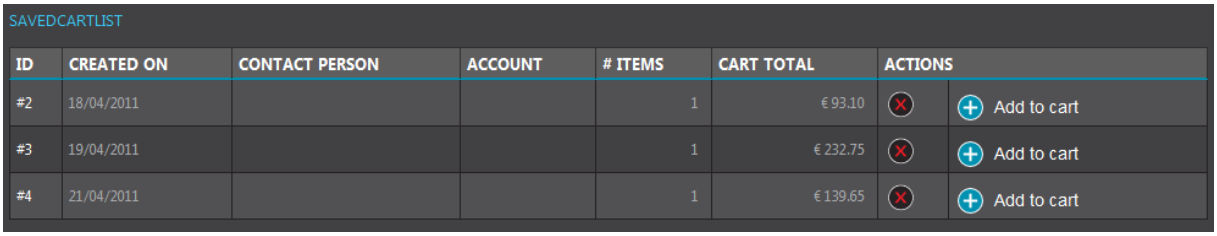
- Account (Authenticated)
- Cart (Authenticated)

The specific widget settings in the following should be defined:



- **Remove:** Type the label or name to be displayed for the **Remove** button on the portal. Type the term ID in the next box.
- **Add to cart:** Type the label or name to be displayed for the **Add to cart** button on the portal. Type the term ID in the next box.

The following is an example:



Search widget

The **Search** widget is used to search for items based on (a part of) the item code or (a part of) the description. It also contains a link to the **Advanced search** widget on the **Catalog** page.

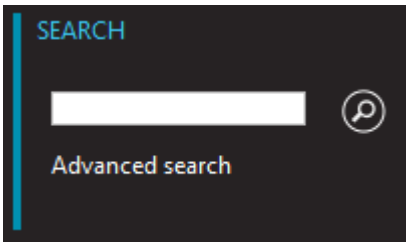
This widget can be used on the following page:

- Master

The specific widget setting in the following should be defined:

- **Advanced search:** Type the label or name to be displayed for the **Advanced search** link on the portal. Type the term ID in the next box.

The following is an example:



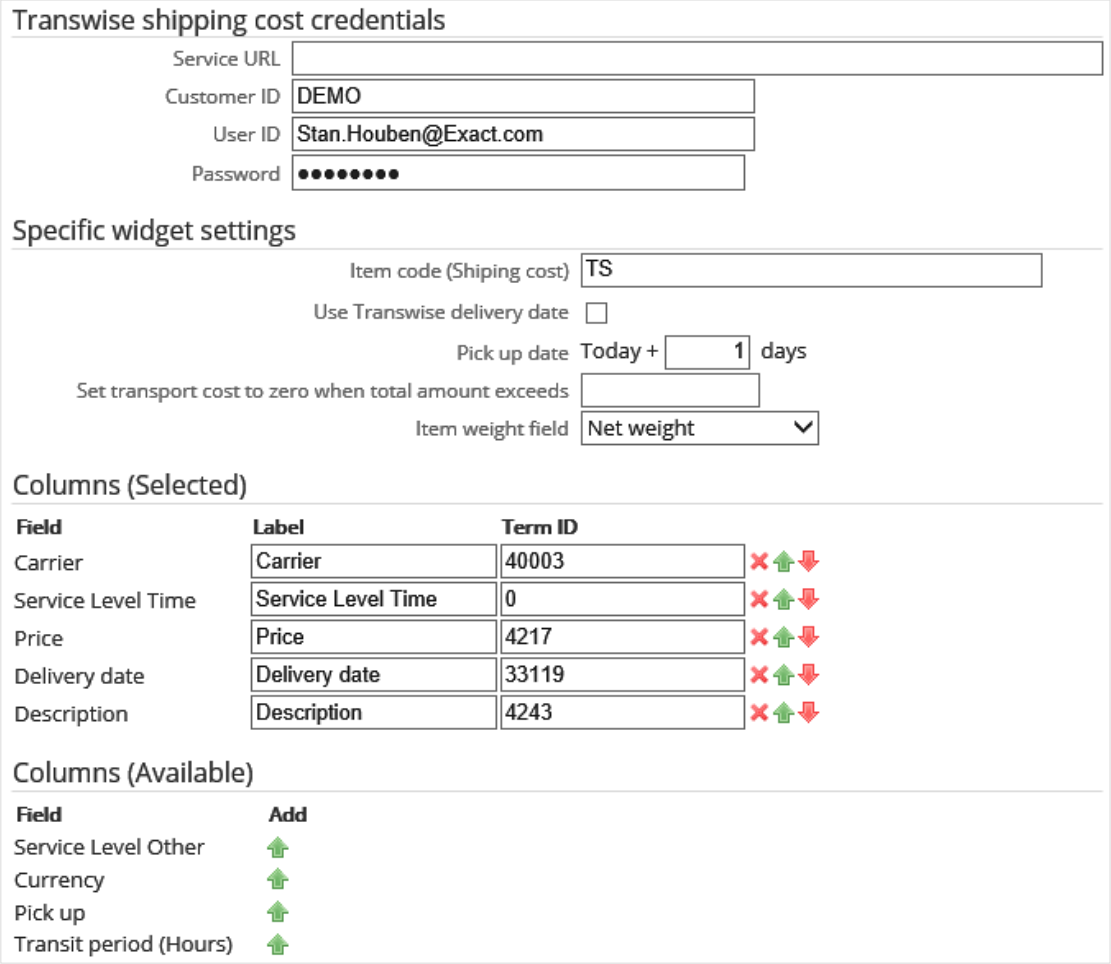
Shipment cost widget

The **Shipment cost** widget enables the visitor or user to decide how the items should be shipped. The cost for each shipping method will be displayed. Once the visitor or user has selected a shipping method and continues to check out the cart, an extra item will be added to the sales order in Exact Globe Next with the shipment cost. This functionality will only work if you have a subscription with Transwise.

This widget can be used on the following page:

- Delivery

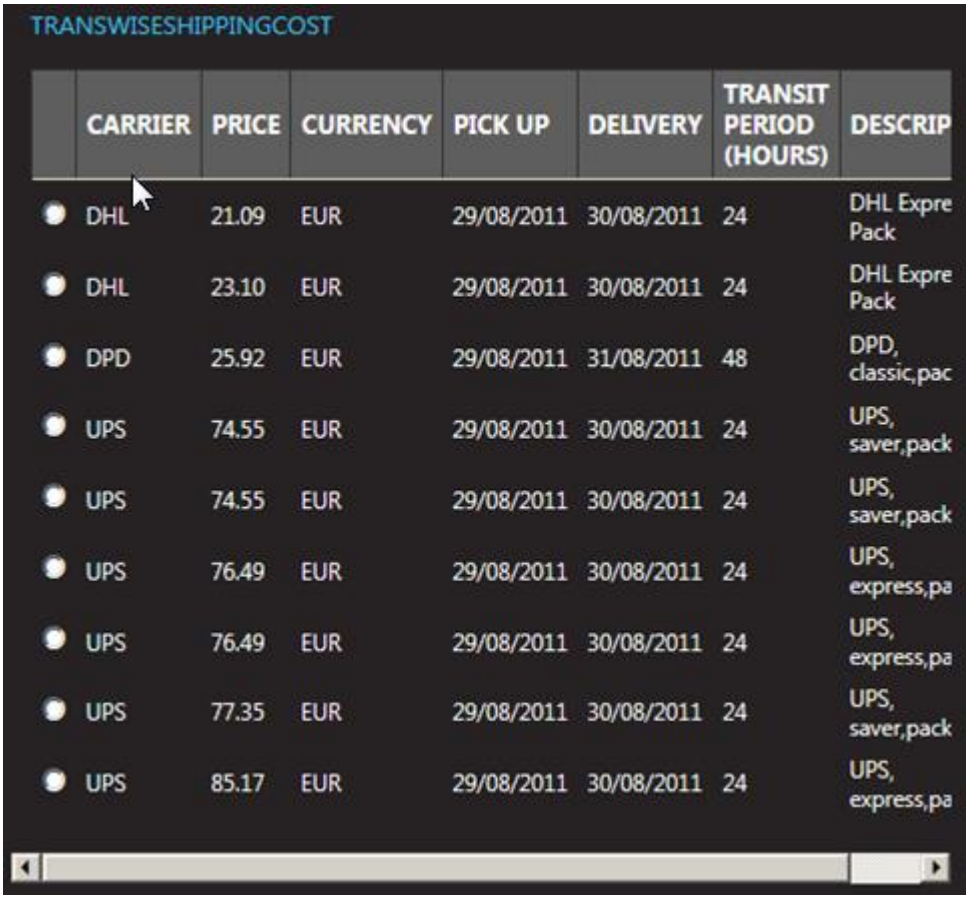
The specific widget settings in the following should be defined:



- Under the **Transwise shipping cost credentials** section, type the service URL, customer ID, user ID, and password at **Service URL**, **Customer ID**, **User ID**, and **Password**. The information is provided by Transwise.
- At **Item code (Shipping cost)** under the **Specific widget settings** section, type the item code of the item to be added to the sales order in Exact Globe Next, including the correct net sales price (provided by Transwise).
- Select the **Use Transwise delivery date** check box to enable the delivery date that is calculated by Transwise to be written to the sales order, instead of the delivery date that is requested by the visitor. Depending on the carrier that is selected, the delivery date may be different.
- At **Pick up date**, type the number of days (including the day of the transaction) for the pick-up.
- At **Set transport cost to zero when total amount exceeds**, type the minimum total amount required to be entitled for the free delivery, if applicable.
- At **Item weight field**, select the type of weight applicable for the items to be used for the costing purpose. Select either **Net weight** or the free fields which can be customized in Exact Globe Next.

- The **Columns (Selected)** section displays the selected columns to be displayed in the widget on the portal only if you have clicked the icon in the **Add** column next to the required columns under the **Columns (Available)** section. You can change the title of the field at **Label**, and/or type the term ID at **Term ID**. The columns which will be displayed on the portal can be deleted by clicking the icon, as well as moved up by clicking the icon or down by clicking the icon.
- The **Columns (Available)** section displays the available columns that can be added to the **Columns (Selected)** section by clicking the icon in the **Add** column. Once added, the selected columns will be displayed in the **Columns (Selected)** section.

The following is an example:



Submit widget

The **Submit** widget is used on various pages. The visitor or user uses it to submit for instance the cart, the confirmation, the information request, et cetera.

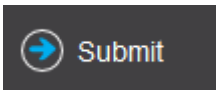
This widget can be used on the following pages:

- Account (Authenticated)
- Cart
- Delivery
- Confirmation
- RequestInfo
- ResetPassword

The specific widget setting in the following should be defined:

- **Submit:** Type the label or name to be displayed for the **Submit** button on the portal.

The following is an example:



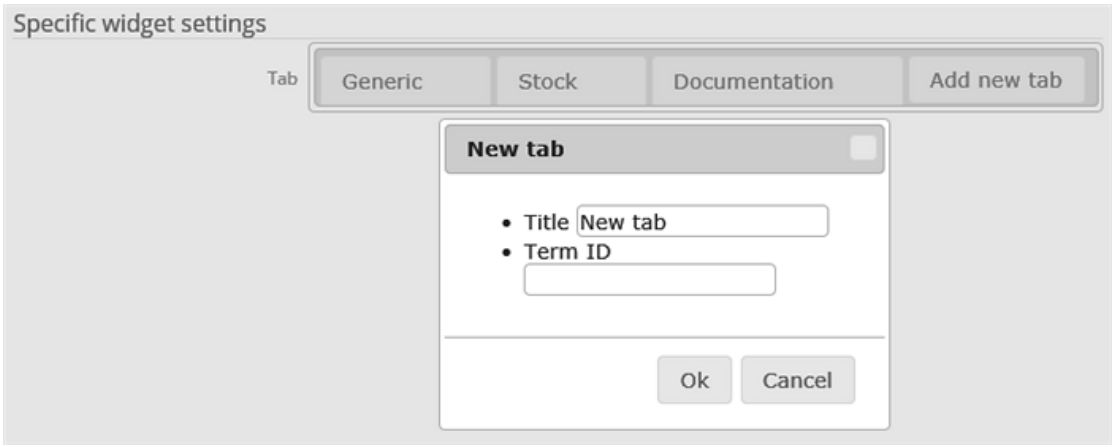
Tab widget

The **Tab** widget can be very useful for organizing a group of different information in a presentable form as it offers flexibility and convenience for the viewers to navigate around.

This widget can be used on the following pages:

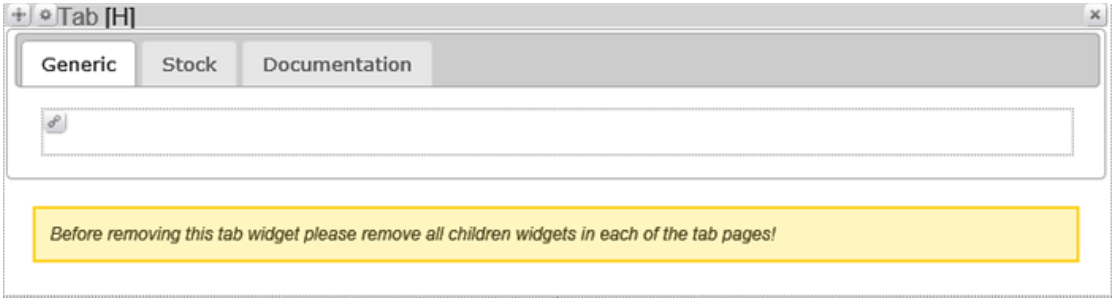
- Home
- Item

The specific widget settings in the following should be defined:



The **Tab** field displays the titles of tabs created. You can create a tab by clicking **Add new tab**. Once clicked, the **New tab** page will be displayed. Type the label or name for the tab to be displayed in the widget at **Title**. You can also define the term ID for each tab created at **Term ID**. Save the settings and click **Close** to exit the widget settings page.

In the **Tab** widget on the **Home** page or **Item** page, the added tabs will be displayed, as shown in the following. You can decide the contents of each tab by adding the relevant widgets by clicking **Add widget** in the required tab.



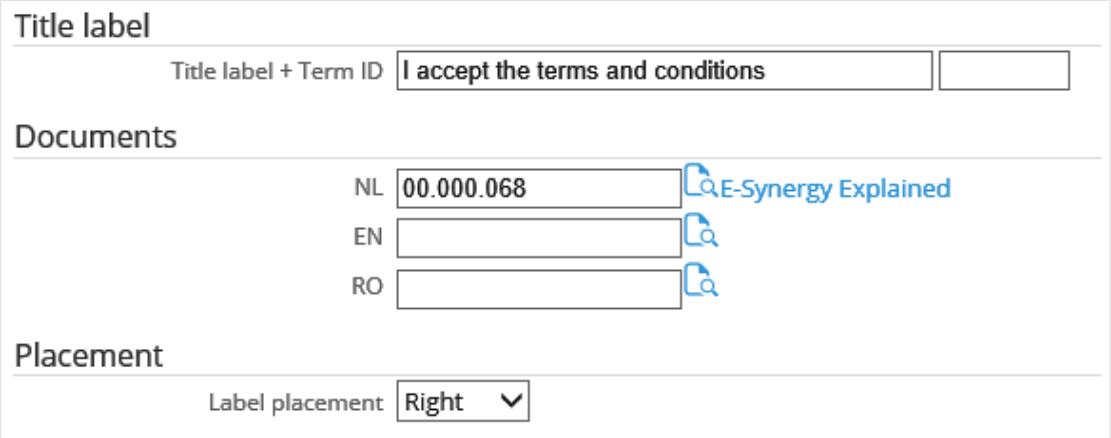
Terms and conditions widget

The **Terms and conditions** widget can be used in the last step before the creation of a sales order in Exact Globe Next. When it is used, the visitor or user has to select the **Terms and conditions** check box in the widget. Otherwise, the check-out process cannot be completed. A link to the **Terms and conditions** document in Exact Synergy Enterprise can be displayed.

This widget can be used on the following page:

- Confirmation

The specific widget settings in the following should be defined:



- At **Title label + Term ID** under the **Title label** section, type the label or text to be displayed in the widget next to the check box. The label or text will only be displayed if a document is linked. Type the term ID in the next box.
- Under the **Documents** section, select the document in Exact Synergy Enterprise to be linked for each selected language field. This document will be displayed via the link at **Title label**.
- At **Label placement** under the **Placement** section, select **Right**, **Left**, **Above**, or **Under** as the position of the **Title label** to be displayed around the check box.

The following is an example:

Text widget

The **Text** widget can be used to display text on the portal. This text can also contain HTML codes, used to link to other websites or pages within the portal.

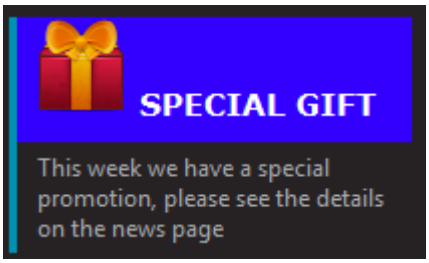
This widget can be used on the following pages:

- Master
- Cart
- Delivery
- Confirmation
- CartDetail
- FavoriteItems (Authenticated)
- Order (Authenticated)
- OrderInvoiceDetail (Authenticated)
- OrderInvoiceList (Authenticated)
- Assortments
- AssortmentCard
- CartThankYou
- Catalog
- CreateProspect
- CreateProspectThankYou
- ElectronicPayment
- Variant
- ItemCategories
- ItemCategories-ItemCategoryCard
- Home
- Login
- RequestInfo
- RequestInfoThankYou
- ResetPassword
- ResetPasswordThankYou
- Account (Authenticated)
- Custom pages

The specific widget setting in the following should be defined:

- **Text:** Type the text that needs to be displayed. HTML codes can also be typed here.

The following is an example:



Title widget

There are two types of the **Title** widget, namely:

- the **AssortmentTitle** widget, and
- the **ItemCategoriesTitle** widget.

The **Title** or **AssortmentTitle** widget displays the name of the assortment in the **Assortments detail** widget on the **AssortmentCard** page. The name of the assortment can be translated. For more information, see *4.2.1 Settings*.

The **Title** or **ItemCategoriesTitle** widget displays the name of the item category in the **Item categories** widget on the **ItemCategories-ItemCategoryCard** page. The name of the item category can be translated. For more information, see *4.2.1 Settings*.

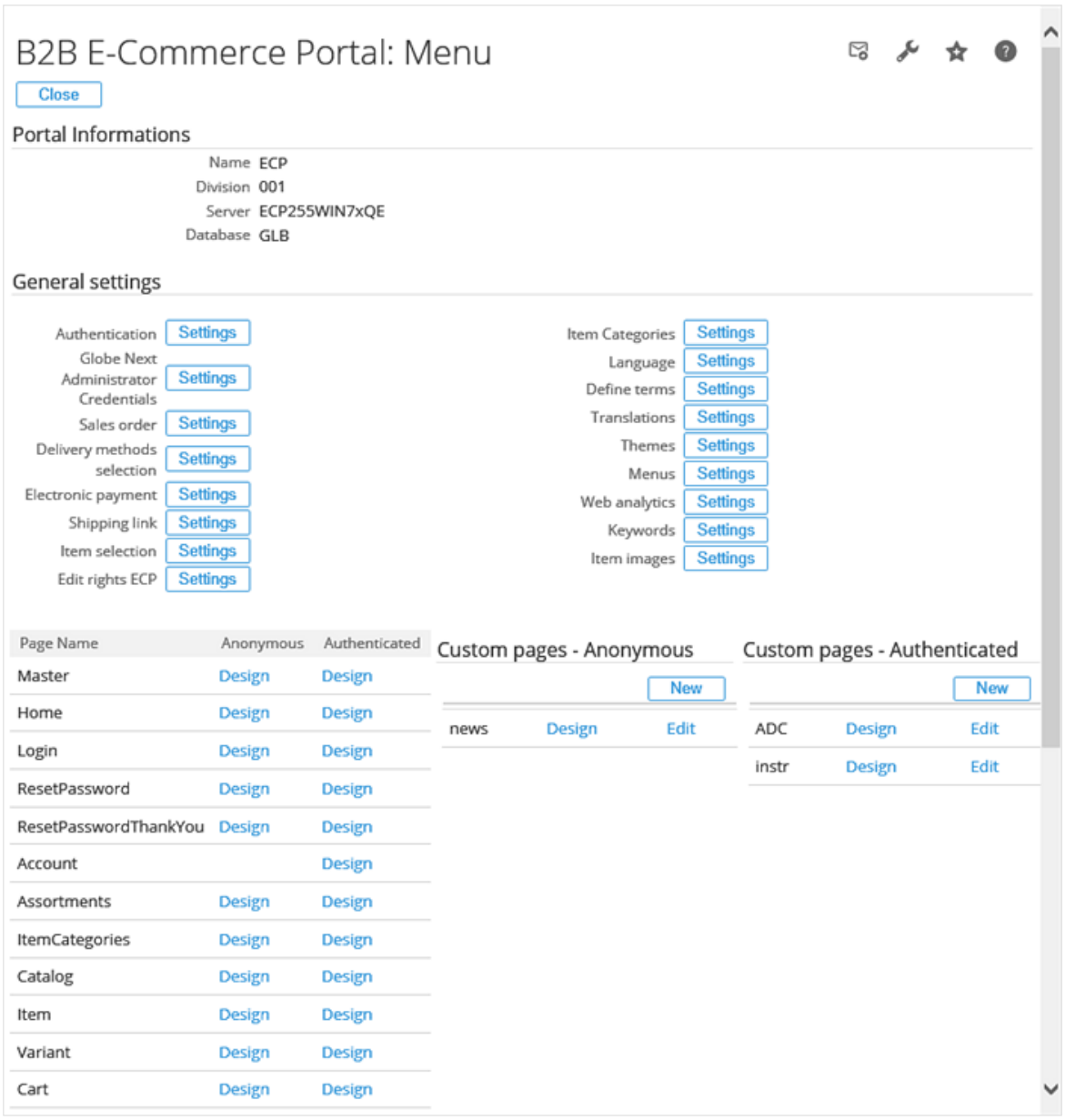
This widget can be used:

- in the **Assortments detail** widget on the **AssortmentCard** page.
- in the **Item categories** widget on the **ItemCategories-ItemCategoryCard** page.

Note:
There are no specific settings for this widget.

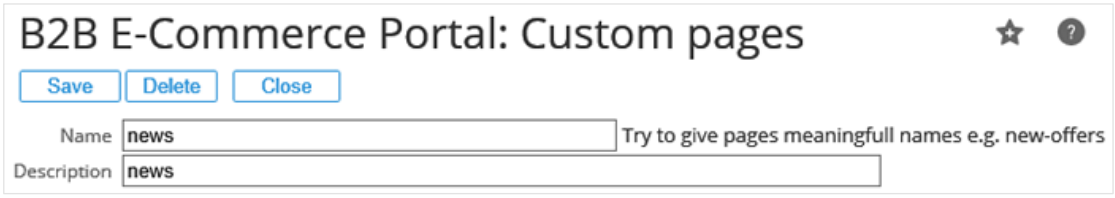
4.4 PRACTICAL GUIDE TO PAGES AND WIDGETS USAGE IN B2B E-COMMERCE PORTALS

On the **B2B E-Commerce Portal: Portal** page, select the required portal hyperlink in the **Name** column. The following page will be displayed:

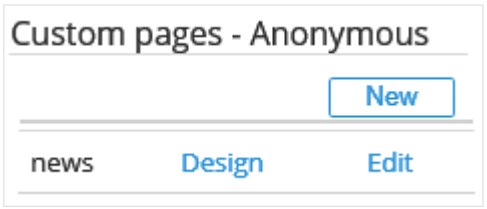


The general information on the selected portal will be displayed under the **Portal Information** section. The **General settings** section allows you to configure the general settings for the selected portal, such as the authentication, language, menu, et cetera. For more information, see *4.2.1 Settings*.

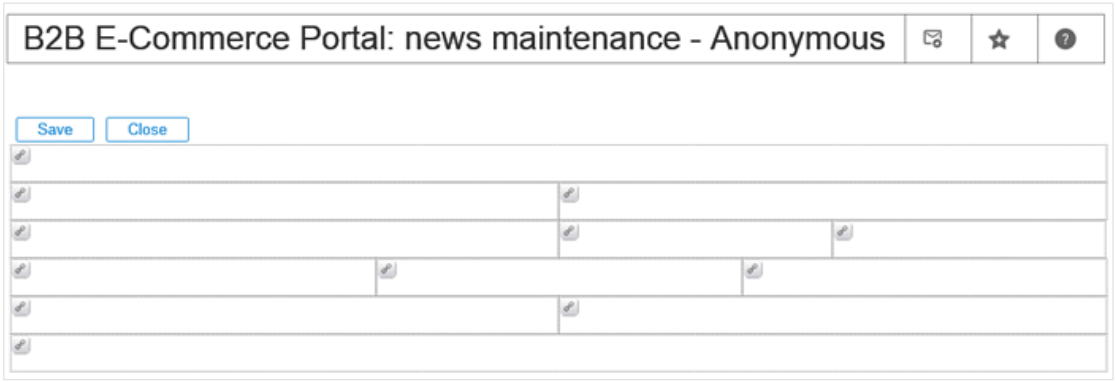
At the lower part of the page, you can select the content page (on the left) or custom page (on the right) that you want to edit by clicking the **Design** hyperlink in either the **Anonymous** or **Authenticated** column. You can also create a custom page by clicking **New** under the appropriate section (either **Anonymous** or **Authenticated**).



Once the custom page has been created, click the **Design** hyperlink to edit it.



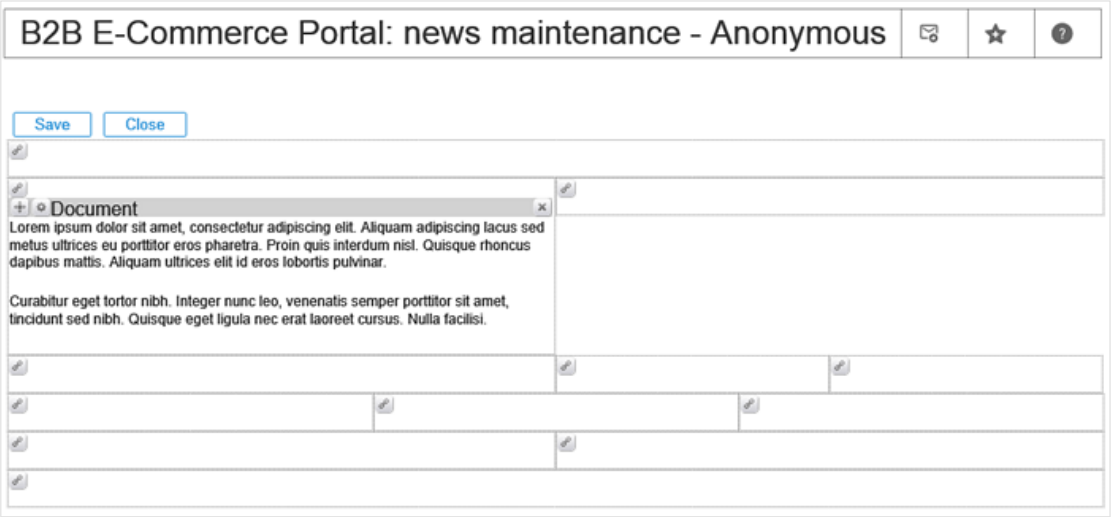
The following is an example of the custom page that has been created and named **News**.



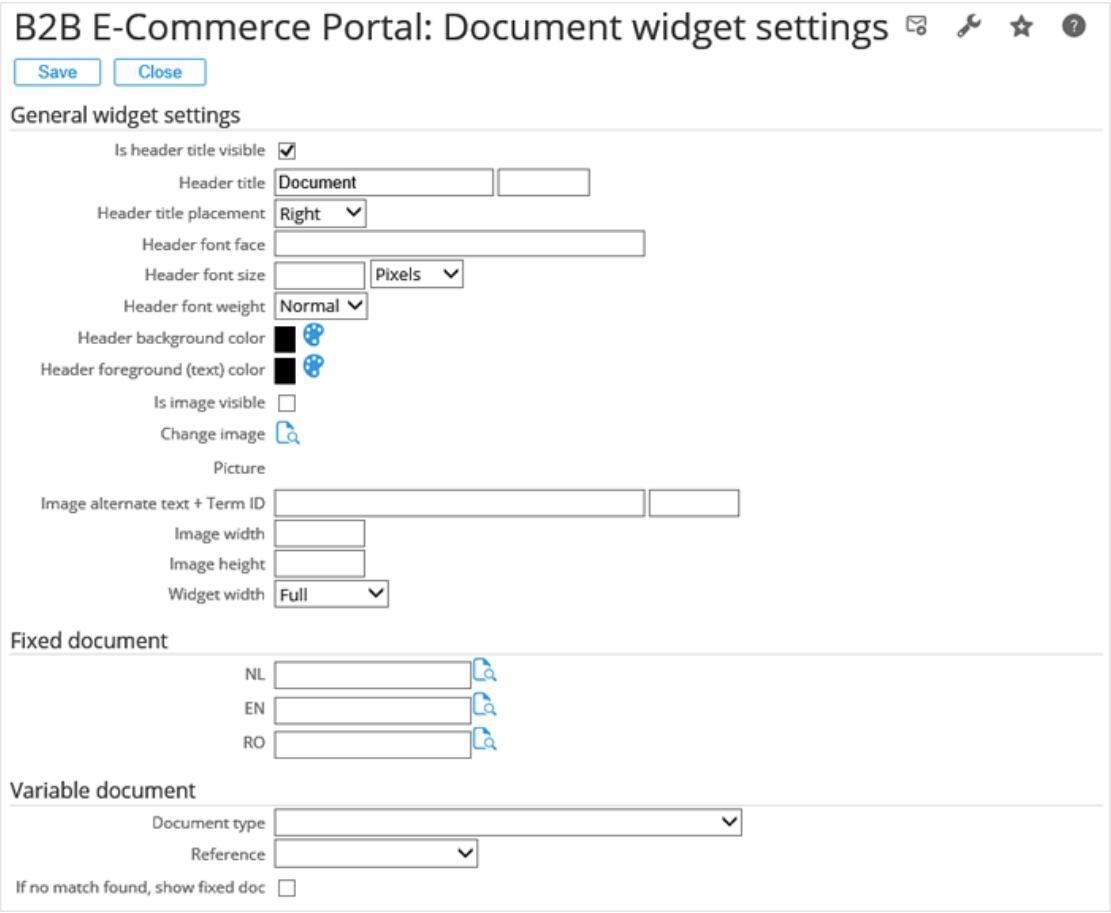
The page is divided into cells. Each cell represents a position on the page. In each cell, widgets can be inserted by clicking **Add widget** in the appropriate cell. After that, a page will be displayed with the available widgets that are applicable for the respective page, as shown in the following:

Select the widget that you want to add by clicking it. The widget will then be placed in the location (cell) on the content page.

The following example displays the **Document** widget that has been successfully inserted on the content page.

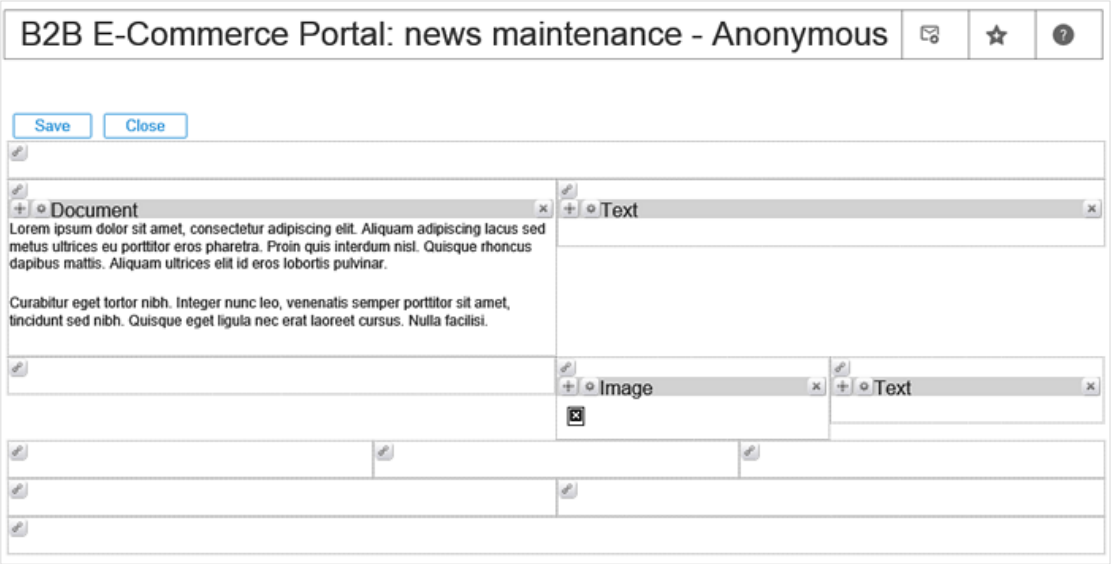


The properties of the widget can be changed by clicking **Settings**. The widget settings page will be displayed. In this case, the **Document widget settings** page will be displayed.

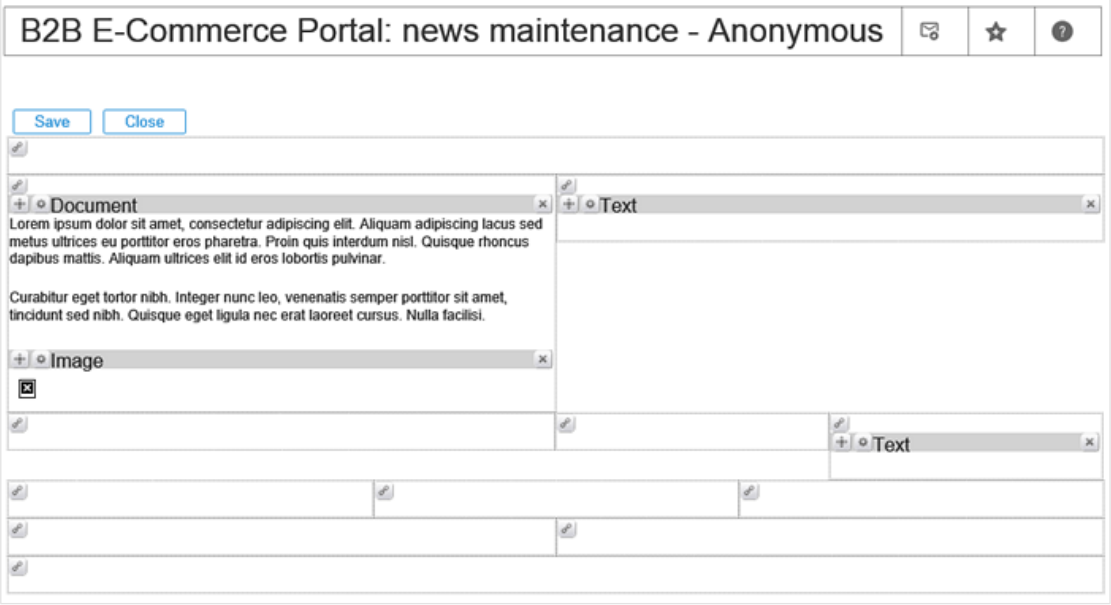


After configuring the settings, click **Save**, and then **Close** to return to the content (maintenance) page.

Other widgets can be added to the content page in the same way. The following content page contains one **Document** widget, two **Text** widgets, and one **Image** widget.



Widgets can also be moved to the right position (cell) or moved within a cell. One widget or more can be placed within a cell. To drag and drop a widget to a cell, click and hold the **Drag** icon of the selected widget and move it to the correct cell, and then release the icon. In the following example, the **Image** widget has been moved to the selected location (to the left column).



A widget can be deleted from the content page by clicking **Delete**. Once you have finished, click **Save.** Click **Close** to return to the content (maintenance) page.

5. PROCESSES FOR VISITORS

This chapter provides brief yet thorough processes that visitors or users will experience when navigating or using the B2B E-Commerce Portal.

5.1 THE ORDER PROCESS

After opening the B2B E-Commerce Portal URL, the visitor or user has to log in to the portal. This will enable the visitor or user to view specific prices, register purchase orders, back orders, invoice history, and so on.

The order process has the following steps:

- Search for the correct items, and this can be done via the following:
  - The **Assortments** widget or the **Assortments** page and drill down on an assortment.
  - The **Catalog** page.
  - The **Search** widget on the **Master** page.
  - The **Advanced search** widget.
  - The **OrderInvoiceList** page.
- Add the items to the cart via the following:
  - The **Catalog** page (if the **Add to cart** widget is implemented there).
  - The **Item** page (if the **Add to cart widget** is implemented there).
  - The **Item quick entry** widget on the **Master** page.
  - Add to cart via saved carts.
  - Add to cart via order invoice list.
  - With the **Excel import** widget.
- Start the **Check-out** process via the **Cart** widget or the **Cart** page. This can only be done by visitors or users that have the **Check-out** rights.
- Define the delivery details as follows:
  - Address
  - Delivery method
  - Delivery date
  - Sales order reference
  - Remarks
  - Invoice to (in case of a reseller or employee, and this widget is no longer supported from product update 251 onwards)
- Submit on the **Confirmation** page.
- If the **Electronic payment** functionality is used, the **ElectronicPayment** page will be displayed. From there, the link with Ogone will be triggered.

After these steps, the **CartThank you** page will be displayed. An e-mail (if applicable) will be sent with a merge document containing the order information. A request (if applicable) will also be created in Exact Synergy Enterprise and this will be linked to the customer and the document.

5.2 THE REQUEST INFORMATION PROCESS

The request information process has the following steps:

- A visitor or user can fill in a form with a question by accessing the **RequestInfo** page from the menu. This can either be an anonymous or an authenticated visitor or user.
- If an anonymous visitor or user accesses the page, the name and address of the anonymous visitor or user must be provided.
- The visitor or user can type the question in the **Remarks** widget.
- The visitor or user can then submit the form.

After these steps, the **RequestInfoThankYou** page will be displayed. An e-mail (if applicable) will be sent with a merge document containing the request information. A request (if applicable) will also be created in Exact Synergy Enterprise and this will be linked to the customer and the document.

5.3 THE CREATE PROSPECT PROCESS

The **Create Prospect** process can either be used by an anonymous or an authenticated visitor or user. In the first case, a new account will be created in Exact Synergy Enterprise. In the second case, a new contact person will be created for an existing account in Exact Synergy Enterprise.

The **Create Prospect** process has the following steps:

- An anonymous visitor or user can access the **CreateProspect** page from the **Login** widget (**Create Prospect** link) or from the menu. An authenticated visitor or user can access the page from the menu.
- If an anonymous visitor or user is accessing the **CreateProspect** page, the name and address of the anonymous visitor or user must be provided.
- An authenticated visitor or user can access the **CreateProspect** page only if the authenticated visitor or user has the **Edit** right. For more information, see *4.2.1 Settings*. Only the contact person data has to be defined in that case.
- The visitor or user must define the required fields or data.
- The visitor or user can then submit the form.

After these steps, the **CreateProspectThankYou** page will be displayed. An e-mail (if applicable) will be sent with a merge document containing the request information, and an account or a contact person will be created in Exact Synergy Enterprise. Also, a request (if applicable) will be created in Exact Synergy Enterprise and this will be linked to the account and the document.

The back-office process has to validate the information and grant rights for the portal before the new visitor or user can log in. There is no automated procedure for this.

6. ANONYMOUS ORDERING

Besides authenticated customers, it is also possible for anonymous visitors to create sales orders. However, anonymous ordering can only be used in combination with electronic payment. This option can be enabled by adding users and passwords to the **Language** settings. For more information, see *4.2.1 Settings*.

The following rules apply:

- In Exact Synergy Enterprise:
  - For each language, an account (account type **Customer**) with a contact person has to be added to Exact Synergy Enterprise.
  - The contact person needs to have the portal right.
- In Exact Globe Next:
  - For each language, a debtor code has to be created in Exact Globe Next in order for each language to have its own price lists or agreements.
  - These debtors should be linked to the **Electronic Payment** payment method via Finance → Accounts receivable → Maintain (the same settings as set in the **Electronic Payment** settings. For more information, see *4.2.1 Settings*).
- On the B2B E-Commerce Portal:
  - On the **B2B E-Commerce Portal: Delivery maintenance – Anonymous** page, the **Create Prospect** widget has to be added instead of the **Address** widget that is used on the **B2B E-Commerce Portal: Delivery maintenance – Authenticated** page.
  - The same applies to the **B2B E-Commerce Portal: Confirmation maintenance – Anonymous** page.

The process will be the same as that for the authenticated process. The end result will be:

- A sales order in Exact Globe Next, linked to the anonymous debtor for the specific language.
- The sales order will have the delivery address that was defined in the **Create Prospect** widget.
- An account in Exact Synergy Enterprise will be created.
- A document (if applicable) will be created in Exact Synergy Enterprise and this will be linked to the newly created account.
- A request (if applicable) will be created in Exact Synergy Enterprise, and this will be linked to the newly created account and the created document.
- The sales order will display the Exact Synergy Enterprise account number in the order description.

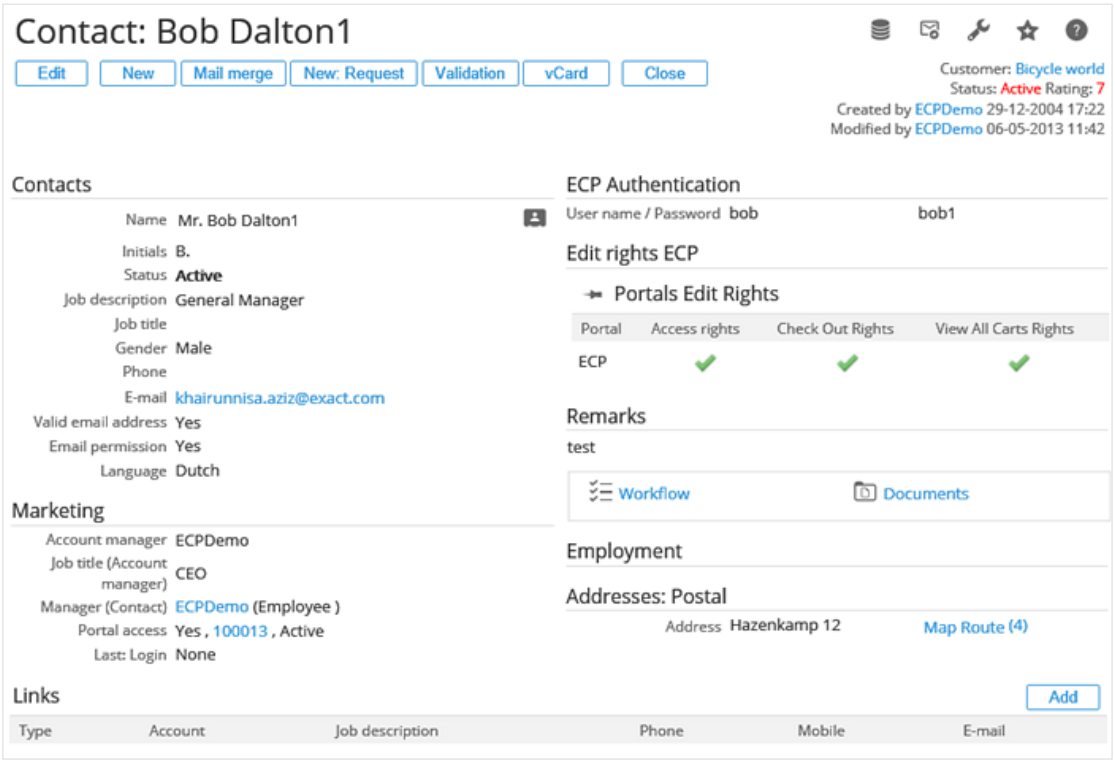
You now have a choice to create a debtor in Exact Globe Next for this new account. If you decide to do so, you have to link a debtor code to this account in Exact Synergy Enterprise and change the debtor number in the sales order in Exact Globe Next.

7. CREATING AND MODIFYING LOGINS IN EXACT SYNERGY ENTERPRISE

All information regarding the B2B E-Commerce Portal access is managed in Exact Synergy Enterprise. The information is stored per contact person.

If the B2B E-Commerce Portal is in your Exact Synergy Enterprise license, two sections will be added to the contact cards, namely:

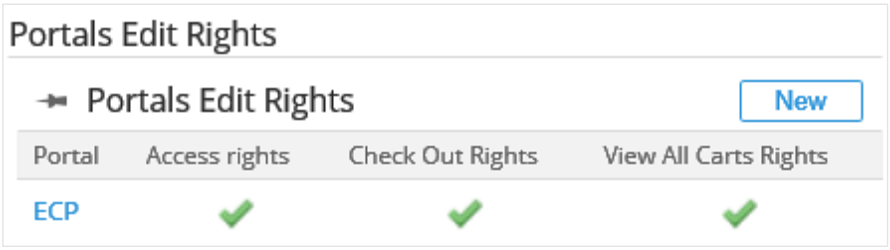
- the **ECP Authentication** section, and
- the **Edit rights ECP** section.



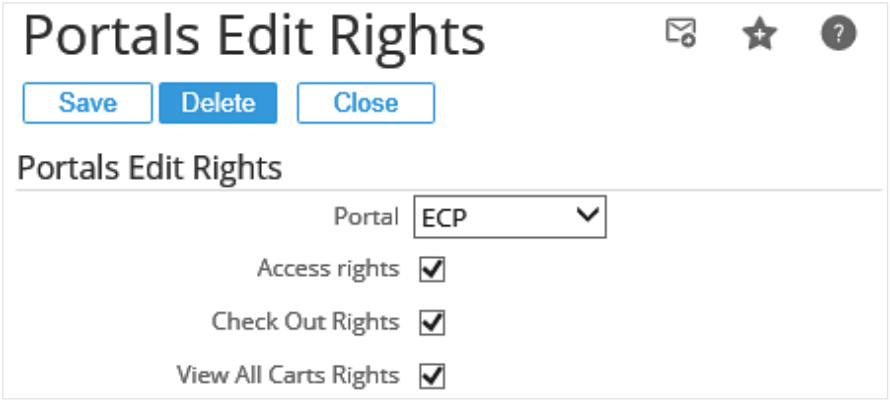
Under the **ECP Authentication** section on the contact card in the view mode, the username and password of the contact person will be displayed. The password is only applicable here if the authentication method of the portal is **Forms**. For more information, see *4.2.1 Settings*.

The password is encrypted and stored in the database, but will be displayed here. If the authentication method is set to **Active Directory**, the password is not applicable.

Under the **Edit rights ECP** section, the rights per portal can be defined on the contact card in the edit mode.



Click the required portal hyperlink in the **Portal** column to modify the portal edit rights. Click **New** to create another portal.

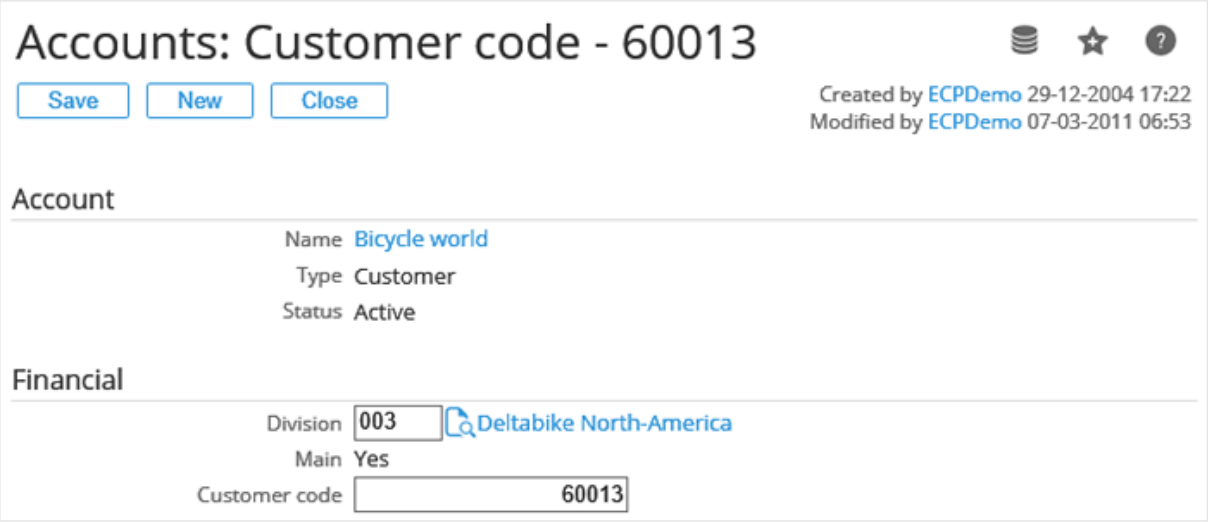


On the **Portals Edit Rights** page, the following fields need to be defined:

- **Portal:** This field displays the name of the selected portal.
- **Access rights:** Select this check box to allow the contact person to log in to the portal to view items, prices, order invoice lists, and so on. The contact person can also define a shopping cart and save the cart.
- **Check Out Rights:** Select this check box to allow the visitors and users to check out carts that they have defined.
- **View All Card Rights:** Select this check box to allow the visitors and users to view the saved carts of all the colleagues within the same company.

8. LINKING DEBTOR CODES TO ACCOUNTS IN EXACT SYNERGY ENTERPRISE

The link between the accounts in Exact Synergy Enterprise and the debtors in Exact Globe Next is very important for the B2B E-Commerce Portal to function smoothly. This is the standard Exact Synergy Enterprise functionality.



For more information, see *Creating and modifying debtor codes (Doc ID: 15.556.353)* in Exact Synergy Enterprise.

9. MERGING CODES

After submitting a cart on the confirmation page, after submitting a new account (or contact person) request from the **CreateProspect** page, after resetting the password from the reset password page, or after submitting an information request from the **RequestInfo** page, a document can be merged and saved in Exact Synergy Enterprise. After that, this document can be e-mailed using the Exact Synergy Enterprise mail functionality.

This is the list of merge codes that can be used in the merge documents:

Merge codes	Description
[WEB_CRM COMPANY.ID]	Account ID
[WEB_CRM COMPANY.CODE]	Account code
[WEB_CRM COMPANY.DEBTORCODE]	Debtor code for the account
[WEB_CRM COMPANY.NAME]	Account name
[WEB_CRM COMPANY.ADDRESS1.POS]	Postal address 1 of the account
[WEB_CRM COMPANY.ADDRESS2.POS]	Postal address 2 of the account
[WEB_CRM COMPANY.ADDRESS3.POS]	Postal address 3 of the account
[WEB_CRM COMPANY.POSTCODE.POS]	Postal code or postcode of the postal address of the account
[WEB_CRM COMPANY.CITY.POS]	City in which the postal address of the account is located
[WEB_CRM COMPANY.ADDRESS1.DEL]	Delivery address 1 of the account
[WEB_CRM COMPANY.ADDRESS2.DEL]	Delivery address 2 of the account
[WEB_CRM COMPANY.ADDRESS3.DEL]	Delivery address 3 of the account
[WEB_CRM COMPANY.POSTCODE.DEL]	Postal code or postcode of the delivery address of the account
[WEB_CRM COMPANY.CITY.DEL]	City in which the delivery address of the account is located
[WEB_CRM COMPANY.COUNTRY.DEL]	Country in which the delivery address of the account is located
[WEB_CRM COMPANY.EMAIL]	Account e-mail address
[WEB_CRM COMPANY.HOMEPAGE]	Homepage URL of the account
[WEB_CRM COMPANY.FAX]	Facsimile number of the account
[WEB_CRM COMPANY.TEL]	Telephone number of the account
[WEB_CRM COMPANY.ACC.MAN]	Name of the account manager of the account
[WEB_CRM CONTACTPERSON.INITIALS]	Initials of the contact person of the account
[WEB_CRM CONTACTPERSON.FULLNAME]	Full name of the contact person of the account
[WEB_CRM CONTACTPERSON.NAME]	Name of the contact person of the account
[WEB_CRM CONTACTPERSON.MIDDLENAME]	Middle name of the contact person of the account
[WEB_CRM CONTACTPERSON.FIRSTNAME]	First name of the contact person of the account
[WEB_CRM CONTACTPERSON.TITLE.SALUTATION]	Salutation used to address the contact person of the account
[WEB_CRM CONTACTPERSON.TITLE.ABBREVIATION]	Abbreviation of the title used to address the contact person of the account
[WEB_CRM CONTACTPERSON.TITLE.DESCRIPTION]	Description of the title abbreviation used to address the contact person of the account
[WEB_CART ORDER.NUMBER]	Order number
[WEB_CART ITEM.CODE]	Item code number (from the order)

Merge codes	Description
[WEB_CART ITEM.DESCRIPTION]	Item description (from the order)
[WEB_CART ITEM.PRICE]	Item price (from the order)
[WEB_CART ITEM.DISCOUNT]	Item discount (from the order)
[WEB_CART LINE.NUMBER]	Line number (from the order)
[WEB_CART LINE.QUANTITY]	Line quantity (from the order)
[WEB_CART LINE.AMOUNT]	Line amount (from the order)
[WEB_CART LINE.TAX]	Line tax (from the order)
[WEB_CART LINE.AMOUNTINCLTAX]	Line amount including tax (from the order)
[WEB_CART TOTAL.TOTALAMOUNTEXCLUDINGVAT]	Total amount excluding VAT in the **Total** line of the order
[WEB_CART TOTAL.TOTALAMOUNT]	Total amount in the **Total** line of the order
[WEB_CART TOTAL.TOTALVATAMOUNT]	Total VAT amount in the **Total** line of the order
[WEB_CART TOTAL.CURRENCYCODE]	Currency code or symbol in the **Total** line of the order
[WEB_CART TOTAL.PAYMENTMETHOD]	Payment method in the **Total** line of the order
[WEB_CART TOTAL.AMOUNTINCLTAX]	Amount including tax in the **Total** line of the order
[WEB_CART DELIVERY.METHOD]	Delivery method for the order
[WEB_CART DELIVERY.DATE]	Delivery date for the order
[WEB_CART PAYMENT.METHOD]	Payment method for the order
[WEB_CART DESCRIPTION]	Order description
[WEB_CART REF]	Order reference
[WEB_CART REMARKS]	Remarks (from the order)
[WEB_LOGIN NAME]	Login username for the B2B E-Commerce Portal
[WEB_LOGIN PASSWORD]	Login password for the B2B E-Commerce Portal
[WEB_CART DELIVERY.CUSTOMERNAME]	Customer name of the delivery address
[WEB_CART DELIVERY.CONTACTPERSON]	Name of the contact person for delivery
[WEB_CRM COMPANY.STATE.DEL]	The state in which the account is for delivery
[WEB_CRM COMPANY.MOBILE]	Mobile number of the account
[WEB_CRM CONTACTPERSON.CUSTOMERNAME]	Name of the customer (from the **RequestInfo** page)
[WEB_CRM REQUESTINFO.REMARKS]	Remarks (from the **RequestInfo** page)

10. CSS CUSTOMIZATION GUIDELINES

10.1 CSS FILES FOR B2B E-COMMERCE PORTAL THEMES

Exact B2B E-Commerce Portal is themed using CSS. The CSS files are located in [ECP]\Portals\[MY_PORTAL]\themes\[MY_THEME]\. There are three CSS files that are loaded in the browser in the following order:

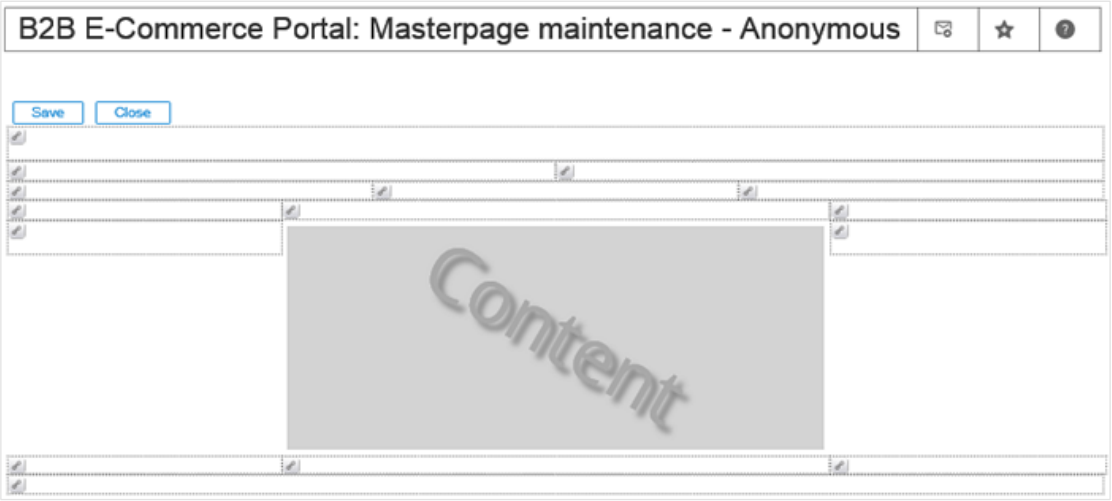
- **Style.css** – This CSS file contains basic styling more or less common to all B2B E-Commerce Portal themes and is replicated in each theme folder. It should not be modified.
- **Theme.css** – This CSS file contains theme-specific CSS declarations. It can, and usually, overrides (repeats) some CSS declarations from **Style.css**.
- **Custom.css** – This is an empty file and its purpose is to contain customer-specific customizations of an existing theme. If a customer likes a theme but wants different fonts, colors, and sizes, then this is the CSS file that should be used for such customizations. Once modified, it should not be overwritten during a B2B E-Commerce Portal update operation.

10.2 B2B E-COMMERCE PORTAL PAGE STRUCTURE

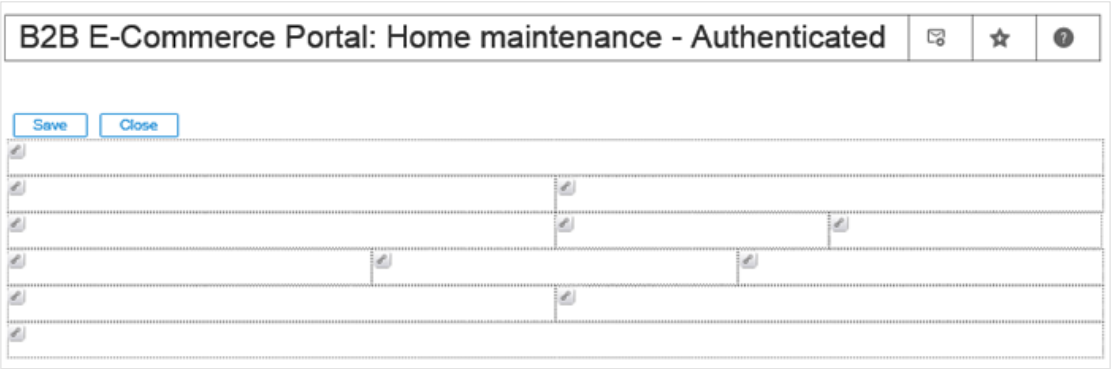
The B2B E-Commerce Portal page has a simple structure. There are widgets, zones (groups of widgets), and areas (groups of zones).

- Each zone has its own CSS class.
- Most of the zones are grouped into an area or groups of zones which consist(s) of a header group, a sidebar group, et cetera.
- Each zone can contain one widget or more, or none at all.
- Each widget has its own CSS class.
- Each widget has one header or none at all, and one widget content. The widget header and the widget content have their CSS classes.
- There are many other CSS classes for widget-specific data, such as item prices, menu items, **Add** or **Delete** buttons, et cetera.

The following displays an example of the zone structure of a B2B E-Commerce Portal page named **Master** page, which is the master layout of the portal. The areas are header, sidebar (left and right), and footer. A few zones belong to both the header (and sidebars for the header) and footer (and sidebars for the footer) respectively.



The following is an example of the zone structure of the content area (which is actually the **Home** page or other page depending on the choice of the designer).



10.3 USING CSS CLASSES FOR CUSTOMIZATIONS

Identifying which CSS classes to use for customizations is important on the B2B E-Commerce Portal. This section discusses the various classes which you can use for customizations, as well as the ones which are not to be used.

10.3.1 B2B E-Commerce Portal specific CSS classes that can be used for customizations

Use `.page` to customize the whole page, such as the background color, font, foreground color, and others.

```
.page
{
      background: none repeat scroll 0 0 transparent;
}
```

Use `.zone` to customize all zones. You will probably not need this. Each zone has its own CSS class. For example, header1, header21, header22, navbar1, sidebar1, footer2, et cetera.

```
.zone
{
     text-align: left;
}
```

Use `.content` to customize all widgets in the content area.

```
.content
{
     color: AliceBlue;
}
```

Use `.master` to customize all widgets in the master area (sidebars, header, and footer).

```
.master
{
     Font-size: 1.2em;
}
```

Use `.header` to customize all widgets in the header area.

```
.header
{
     color: #FFFFFF;
}
```

Use `.sidebar` to customize all widgets in the left and right sidebars.

```
.sidebar
{
     font: 75%/1.231 "Segoe UI Light","Segoe UI","Helvetica
Neue",Arial,Helvetica,sans-serif;
}
```

Use `.footer` to customize all widgets in the footer.

```
.footer
{
     overflow: hidden;
}
```

Use `.portlet` to customize all widgets.

```
.portlet
{
     font-size: 14px;
}
```

Use `.portlet-header` to customize the headers for all widgets.

```
.portlet-header
{
     padding-bottom: 10px;
}
```

Use `.portlet-content` to customize the contents for all widgets.

```
.portlet-content
{
     font-weight: bold;
}
```

Use `.is-[WIDGET_NAME]` to customize a specific widget.

```
.is-MenuWidget
{
     padding-left: 30px;
}
```

Use `.is-[WIDGET_NAME] .portlet-header` to customize the header for a specific widget.

```
.is-TextWidget .portlet-header
{
     width: 96px;
}
```

Use `.is-[WIDGET_NAME] .portlet-content` to customize the content for a specific widget.

```
.is-CartWdiget .portlet-content
{
     line-height: 1.2em;
}
```

Use other classes to customize other elements. You can obtain the classes using the tools mentioned in the following example:

Style the **Logout** button in the **Metro** theme.

```
.logout {
    background: url("img/logout.png") no-repeat scroll 0 0 transparent;
    border: 0 none;
    color: red;
    cursor: pointer;
    font-size: 14px;
    height: 22px;
    margin: 3px 0 0 2px;
    overflow: hidden;
    padding-left: 0;
    width: 123px;
}
```

10.3.2 B2B E-Commerce Portal specific CSS classes that are not to be used for customizations

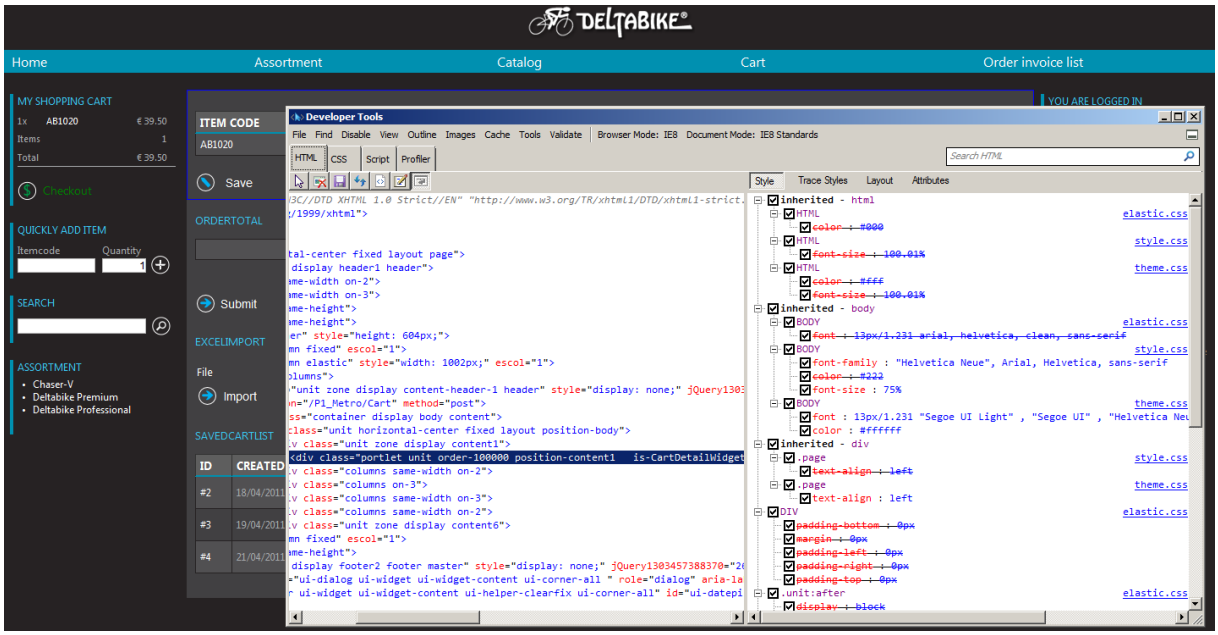
The following classes are not to be used due to the reason that they belong to third party CSS frameworks. They are not meant to be altered except for very good reasons, or when the recommended CSS classes are of no use for the scenario mentioned in *10.3.1 B2B E-Commerce Portal specific CSS classes that can be used for customizations*.

The following CSS classes must not be used:

`.columns, .column, .unit, .display, .container, .horizontal-center, .fixed, .layout`, `.position-navbar1` (or anything that has numbers in the class name)

10.4 INTERNET EXPLORER WEB DEVELOPER TOOLS

Use Internet Explorer Web Developer Tools (by pressing the F12 key) to inspect the HTML elements and find out their classes and styling.



11. SEARCH ENGINE OPTIMIZATION (SEO)

11.1 WHAT IS SEO?

Search engine optimization (SEO) is the process of improving the visibility of a website or a web page in the search engines via the natural or unpaid (organic or algorithmic) search results. In general, the earlier (or higher ranked on the search results page), and more frequently a site is displayed in the search results list, the more visits it will receive from the search engine's users. SEO may target different kinds of search, including image search, local search, video search, academic search, news search, and industry-specific vertical search engines.

As an Internet marketing strategy, SEO considers how search engines work, what people search for, the actual search terms or keywords typed into search engines, and which search engines are preferred by their targeted audience. Optimizing a website may involve editing its content, HTML, and associated codings to both increase its relevance to specific keywords and to remove barriers to the indexing activities of search engines. Promoting a site to increase the number of backlinks, or inbound links, is another SEO tactic.

(Source: Search engine optimization, Wikipedia)

11.2 SEO IN B2B E-COMMERCE PORTALS

The B2B E-Commerce Portal contains basic support for SEO. That means, every item page can be reached via a direct URL (for instance, http://my-server01/B2BPORTAL/item/ab1020) and every item page contains meta information about the item. That information can be viewed by selecting **Source** from the **View** menu in the internet browser on the (item) page.

Search engines will look for the following meta information and will include it in their indexes.

```
<meta name="title" content="Custom Wheelset" />
<meta name="description" content="" />
<meta name="keywords" content="AB1020,Custom Wheelset," />
```

12. ADD-ONS

If add-ons are installed in Exact Synergy Enterprise, and that impacts one of the B2B E-Commerce Portal processes, such as creating accounts, creating requests, creating documents, make sure the **dll** files are also installed in the **bin** folder on the portal.

APPENDIX 1: PRODUCT UPDATE CHANGES

Product Update	Chapter
251	All chapters
252	1, 3.3.3, 3.3.5, 4.2, 4.2.1, 4.3.3, 4.3.5, 4.4, 5.1, 9
253	1, 4.2.1, 4.3.5, 9
254	1, 2, 4.3.5
255	All chapters
257	3.3.1, 4.3.5 (Item stock widget)