Alcom

POD ONLINE ORDERING SYSTEMS

Alcom Advanced User Guide

Online System User Guide

ALCOM ONLINE ORDERING SYSTEM

www.podonlinesystems.com/alcom

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Alcom Users

1

Log onto the System

Internet Access Required

TO Log onto the system from any browser go to :

http://www.podonlinesystems.com/alcom

Each user has been setup with a user name and password.

(This information should have been emailed to you)

Click: Please Sign In

- Enter your : Email Address
- Enter the password that has been supplied to you

You will see: Welcome <your name> and Company Name

You are now logged into the system and may place orders, view your order history or perform administrative tasks.

Alcom Users may change the company to view in their profile screen.

This will allow Alcom employees to limit what they are viewing to a specific master company.

Admin Options -

User Options

To add a user to the system

1. Click on User Options
2. Click on Add New User
3. Fill in the User's information
4. Select a User Account Status
5. Select a User Type
6. Select a User Group
7. E-mail Address – *(must be in lower case)*
8. Type in a Password – *(alpha numeric- example- ab1234)*

Select Default Contact Number – Best number to reach the user at
Select a Payment Options – Payment Required
Complete Information for Company

9. Company Name
10. Street Address
11. City
12. State
13. Zip Code
14. Select a Country – Must be filled in
15. Phone
16. Select Address Type – Business or Residence
****REQUIRED****
17. User Profile Company View
18. Master Company Must be assigned

Click Add when information has been completed.

To **Search** For or **Modify a User**

To do a Search for a user:
You may do it by Company or by Last Name or Both

Type in the field what you are looking for
Click Find when you are ready to do the search

Search For or **Modify a User continued**
OR

Do it by the first letter of the last name or company name or both by clicking on the letter with radio buttons.
Click Go when the selection has been made

Once you find the user that needs to be modified,
High light the user
Click on Modify Selected User

Modify what needs to be changed
Scroll to the bottom of the screen
Click on Update to save changes

Inventory Options

Click on **Inventory Options** – this displays all the inventory options

To **Create a New Category**

1. Click on Category Administration – on the right hand side Add the New Category
2. Type in Title
3. Type in a Description
4. Select Category Pricing
5. Select Category Status
6. Select a Sort Order (if required)
7. Select a Category Alert (if required)
8. If the Category has a restriction (for anyone that should not see it please Click Update to save and than go back and modify the category to select the restriction(s)).
9. Click update to save

To Modify an Existing Category

1. Select the category
2. Click on Modify Selected Category
3. Change the field(s) that need to be changed (Scroll down)
4. Click Update to save changes

Add New Products

Select a Template that you would like to work off of to add the New Product. Select from Category or Product Template

Selecting from a **Category Template**
(This selection will add your new product to selected category)

1. Type in Product Name
2. Type in Product Code
3. Select if the Product is POD (Print On Demand)
4. Type in Product Description
   (this will appear for the user when placing an order)
5. Select if the product is a PDF Item
6. Up Load the Product Image and select Orientation
7. Up Load the Product PDF to be Printed (if required)
8. Up Load the Product Sample for PDF (if required)
9. Up Load the Product Sample for PDF (if required)
10. Type in the reorder Alert Level
11. Type in the email address of the recipient for the alert
12. Select if the Product is a Free Download
13. Type in the UOM (unit of measure)
14. Click Update to save (when saved you must modify the product to assign the pricing grid, remember the product must be disabled to complete this section)

15. Select the user restrictions that apply to this product

Selecting from a **Product Template**

(This selection will copy the primary field settings from the product selected, and your new product will be assigned to that category)

Follow the steps listed above in:
(selecting from a Category Template)

Adding a Personalized Product (POD)

(Click on the Icon below for Instruction)

Adobe Acrobat Document

Creating a PDF Form for the system

(Click on the Icon below for Instruction)

Adobe Acrobat Document

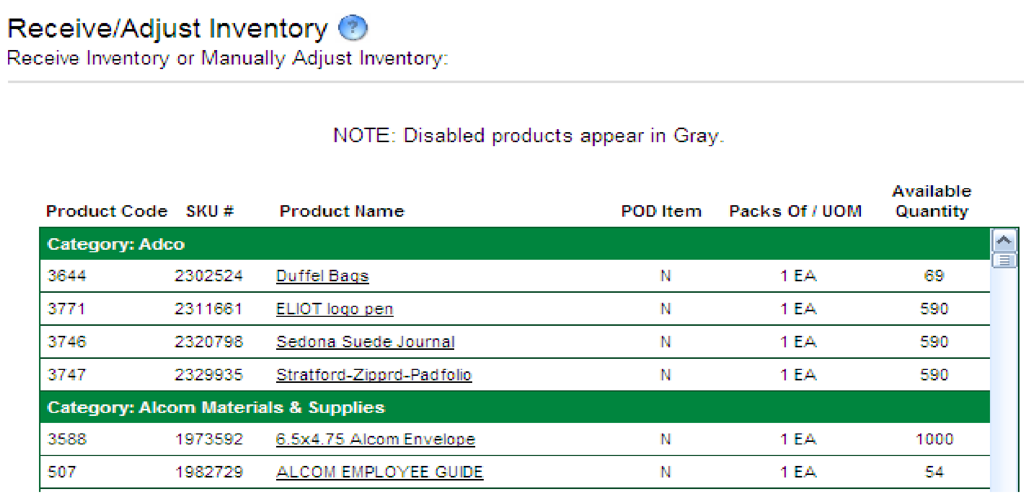
Modify Existing Product

1. Search for the Product or look through the list of products (products are displayed by category, products that appear in black are active and products that appear in gray are inactive) when you find the product that needs to be Modified click on the product to display the details
2. Make your modifications
3. Click Update to save

Receive/Adjust Inventory

(Products are displayed by category, products that appear in black are active and products that appear in gray are inactive)

1. Click the Product name
2. Select Adjustment type
3. Type in Adjustment/Receiving Amount
4. Type in the Adjustment/Receiving Comment
   (a comment must be entered in order to receive or adjust any inventory, this is required for audit trail)
5. Click on Adjust Inventory to save

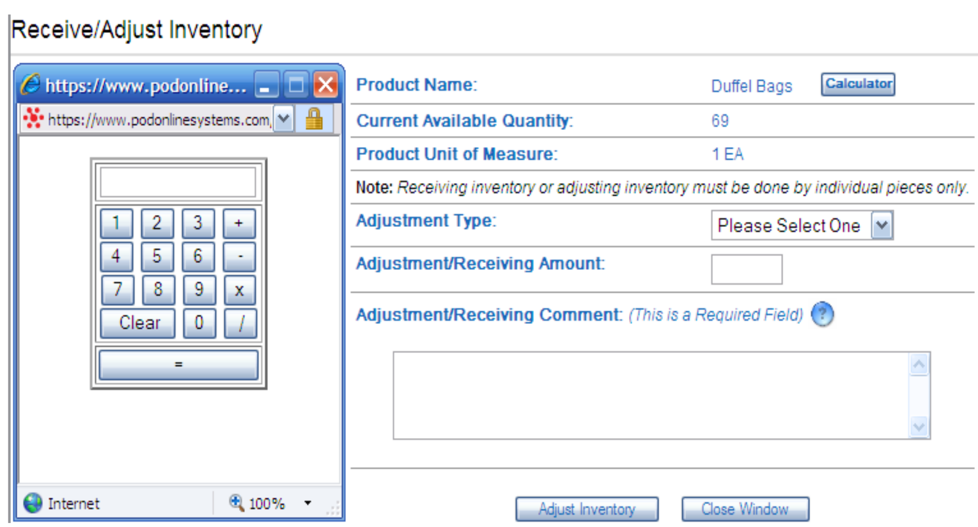


Receive/Adjust Inventory

Receive Inventory or Manually Adjust Inventory:

NOTE: Disabled products appear in Gray.

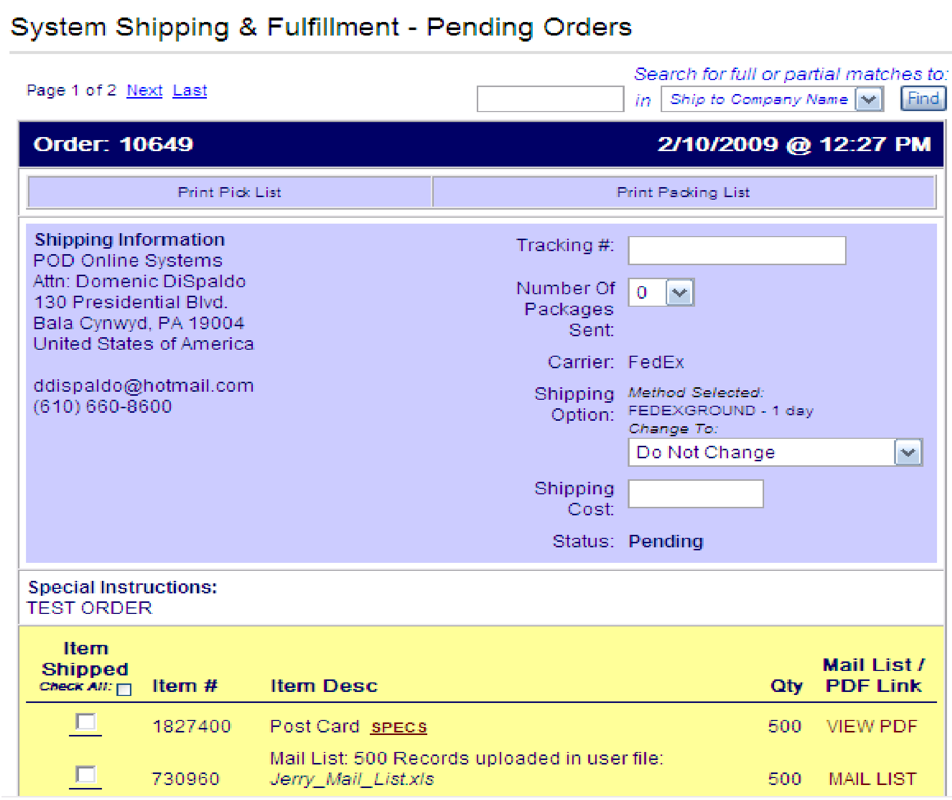
Product Code	SKU #	Product Name	POD Item	Packs Of / UOM	Available Quantity
Category: Adco					
3644	2302524	Duffel Bags	N	1 EA	69
3771	2311661	ELIOT logo pen	N	1 EA	590
3746	2320798	Sedona Suede Journal	N	1 EA	590
3747	2329935	Stratford-Zipprd-Padfolio	N	1 EA	590
Category: Alcom Materials & Supplies					
3588	1973592	6.5x4.75 Alcom Envelope	N	1 EA	1000
507	1982729	ALCOM EMPLOYEE GUIDE	N	1 EA	54



Shipper Options

Pending Orders

1. Click on Shipper Options
2. Click Pending Orders
3. Scroll through the pages of Pending Orders
4. If there are no pending order the screen will tell you
5. You may switch between Master Companies by using the Drop Down



(If products ordered are POD a print ready PDF will be attached, if a mail list was purchased or supplied it will be attached here) (see above link)

Shipping Department should fill out all appropriate information and mark orders shipped as needed.

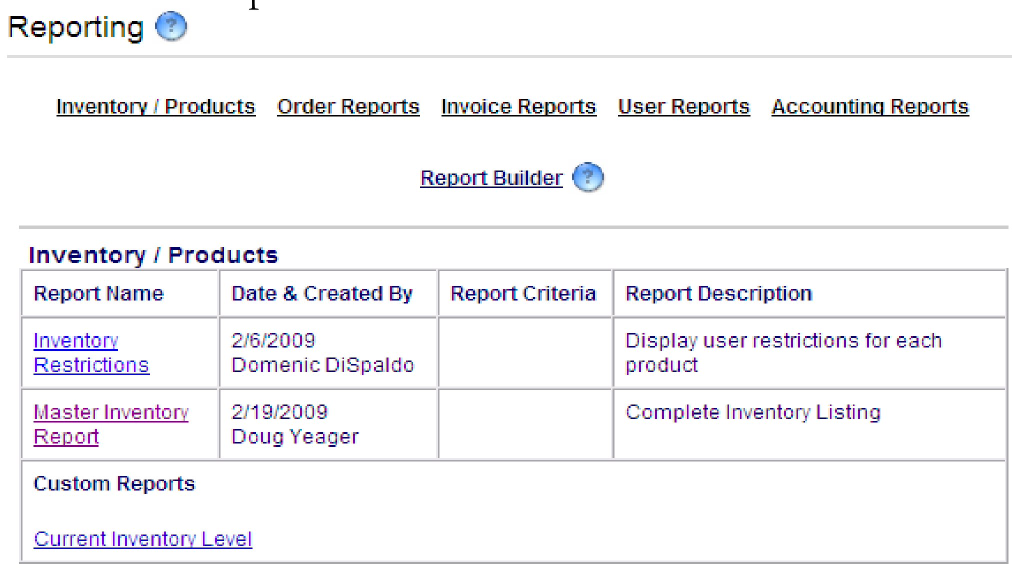
Shipped Orders

1. Click on Shipper Options
2. Click on Shipped Orders
3. Scroll through the pages of Shipped Orders
4. You may switch between Master Companies by using the Drop Down List

(There is a search option if you are looking for an order. Type in what you know and select where you would like to do the search for in the drop down box. Select from Ship to Company Name, Bill to Company Name, Order Number, or Tracking number)

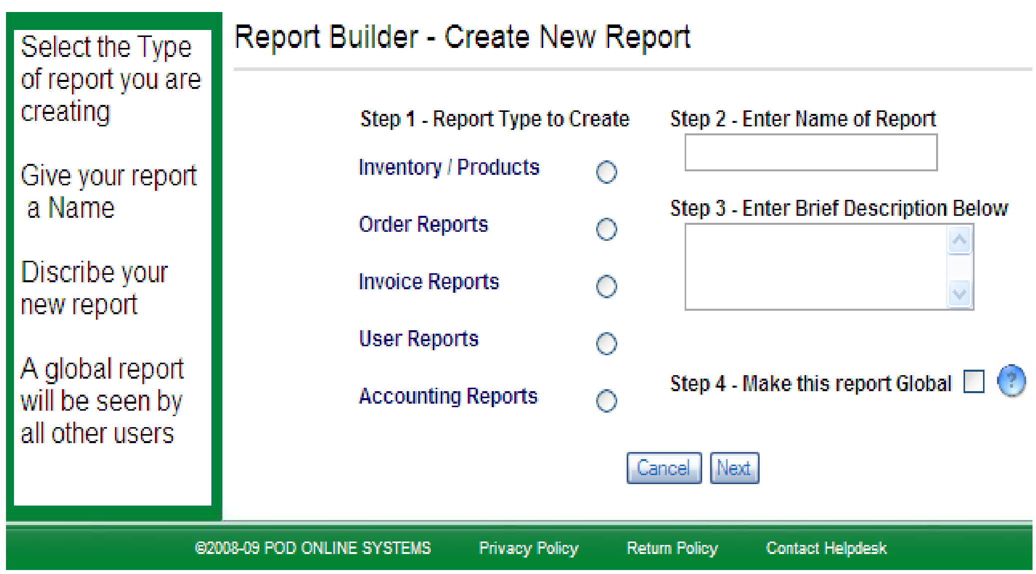
Reporting

The reporting feature is only available to users with specific authority. **(The report writer should only be given to users who are familiar with writing custom reports)** The system supplied reports are generally enough for most Master Companies and Users.

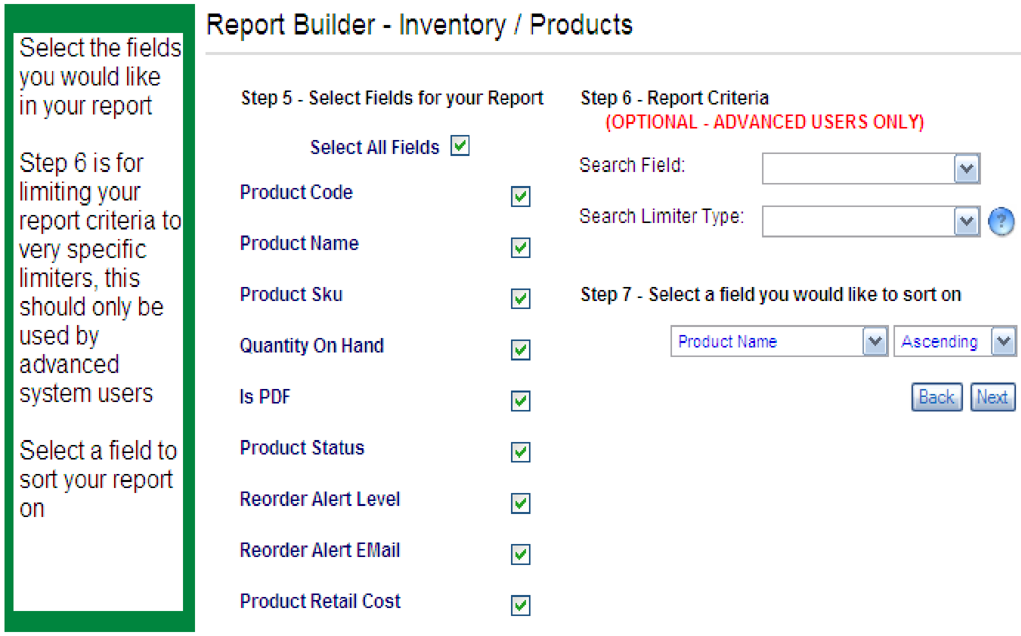


Select the report you wish to generate by clicking on the link.

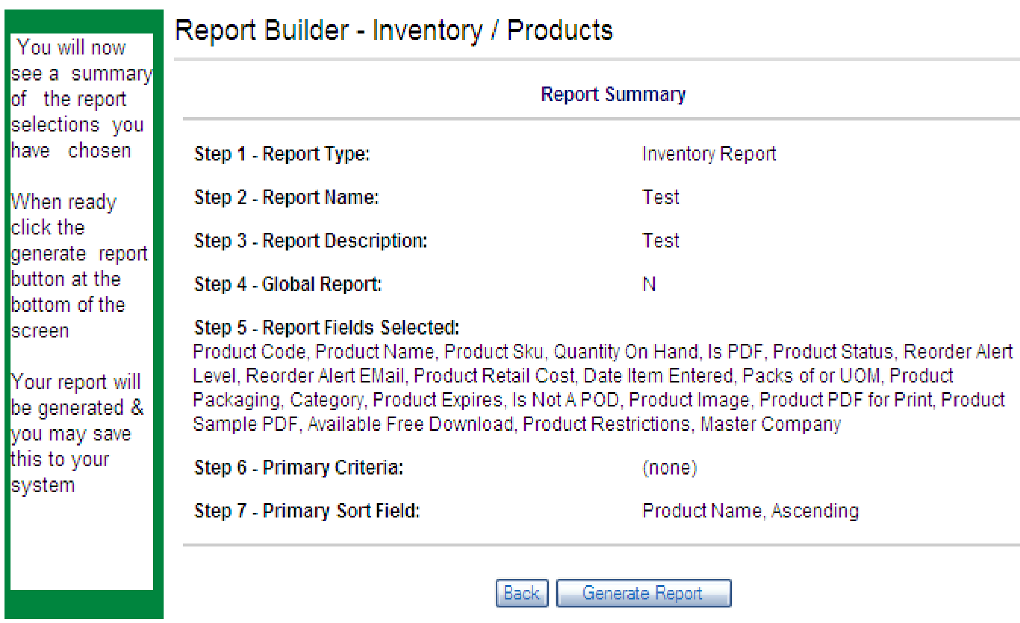
Report Builder



Page 2 of Report Builder



Page 3 of Report Builder



The reports you create will be available to you in your report list the next time you enter the reporting section of the system.

System Options

Scrolling Message Admin

To **Create a New Message**

1. Click on System Options
2. Click on Scrolling Message Admin

On the Right Hand side of the screen enter the following

3. Message Title
4. Message – Limited to 1500 characters
5. Message Link (only available if purchased separately)
6. Select Limited to Specific Category
7. Select a Link Target – Current Window must be selected, (New Window only available if purchased separately)
8. Select the Message Status – Enabled or Disabled
9. Select the Message Sort Order – The order to see the messages in the scrolling window
10. Click Add New Message to save

To **Modify the Scrolling Message**

1. Click on the Message to highlight it
2. Click on Modify Selected Message
3. Change the fields that need to be modified
4. Click on Update to save

E-mail Notifications (only available if purchased separately and activated on separate email server)

1. Click on E-mail Notification
2. Click on the field for your custom trigger
3. Type in the email address or upload a file of the person(s) who will receive the information or blasts
4. Upload the template being used
5. Add the date time this should be sent and confirm

Click To Set a New **Locked Pricing Grid**

1. Click on System Options
2. Click on Set Locked Pricing
3. Put in the password
4. Type in Price Group – The name of the pricing grid that you are creating
5. Type in the Cost – Normally 0 (zero)
6. Type in the Price – What will be charged to the Customer
7. Type in the Qty – How many the carton holds or how many is in a pack
8. Type in the Weight – This must be accurate for the products the customer is paying for. If the item is free for the customer the weight must be zero.

To Modify a **Locked Pricing Grid**

(this field is password protected)
(Only available to Corporate Admin)

1. Click on System Options
2. Click on Set Locked Pricing
3. Put in the password
4. Click on the Price Group to highlight
5. Click on Modify Selected Group
6. Modify the field that need to change
7. Click Update to save

To Add/Modify User Restrictions

The **User Restriction** is for products.

Modify User Restrictions

Modify/Add Group Restrictions:

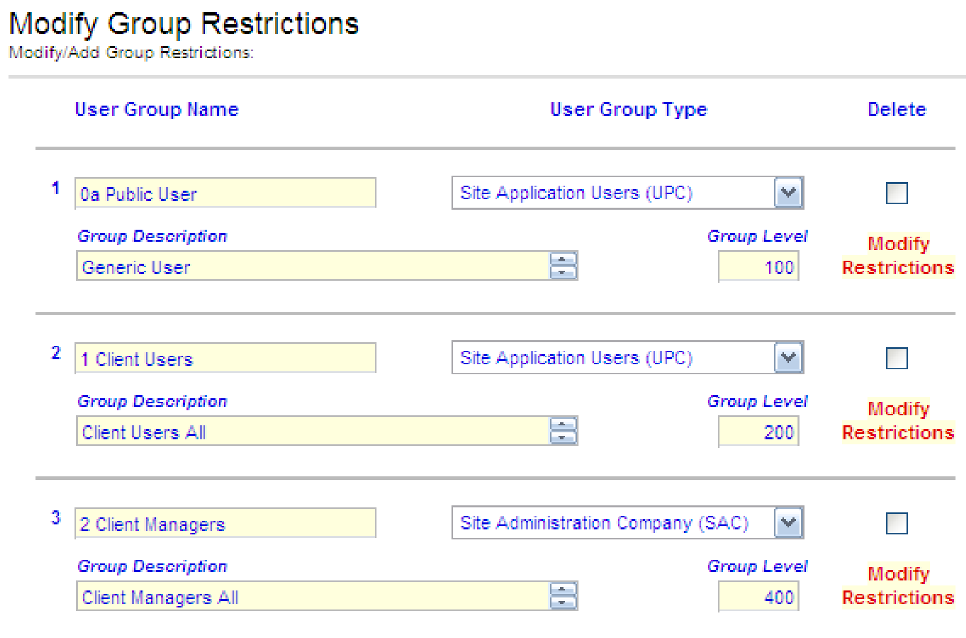
	User Type Name	User Type Hierarchy	(Currently not used) User Type Description
1	Public	100	
2	Client General User 1	200	
3	Client General User 2	201	
4	Client General User 3	202	
5	Client General User 4	203	
6	Client Manager 1	225	
7	Client Manager 2	226	
8	Client Admin	300	
9	Corp. POD / Fulfillment User	400	
10	Corp. POD / Fulfillment Mgr.	450	
11	Corporate Sales	500	
12	Corporate Customer Service	550	
13	Corporate Management	600	
14	Corporate Admin	700	
15	POD Fulfillment	1000	

This restriction is used for who can see or who cannot see a product.

(Remember users can only see products and categories assigned to their Master Company)

To Add/Modify Group Restrictions

(Group Restrictions are what a user can and cannot do)



To modify a group click on Modify Group next to the appropriate level

Group Restrictions for 2 Client Managers

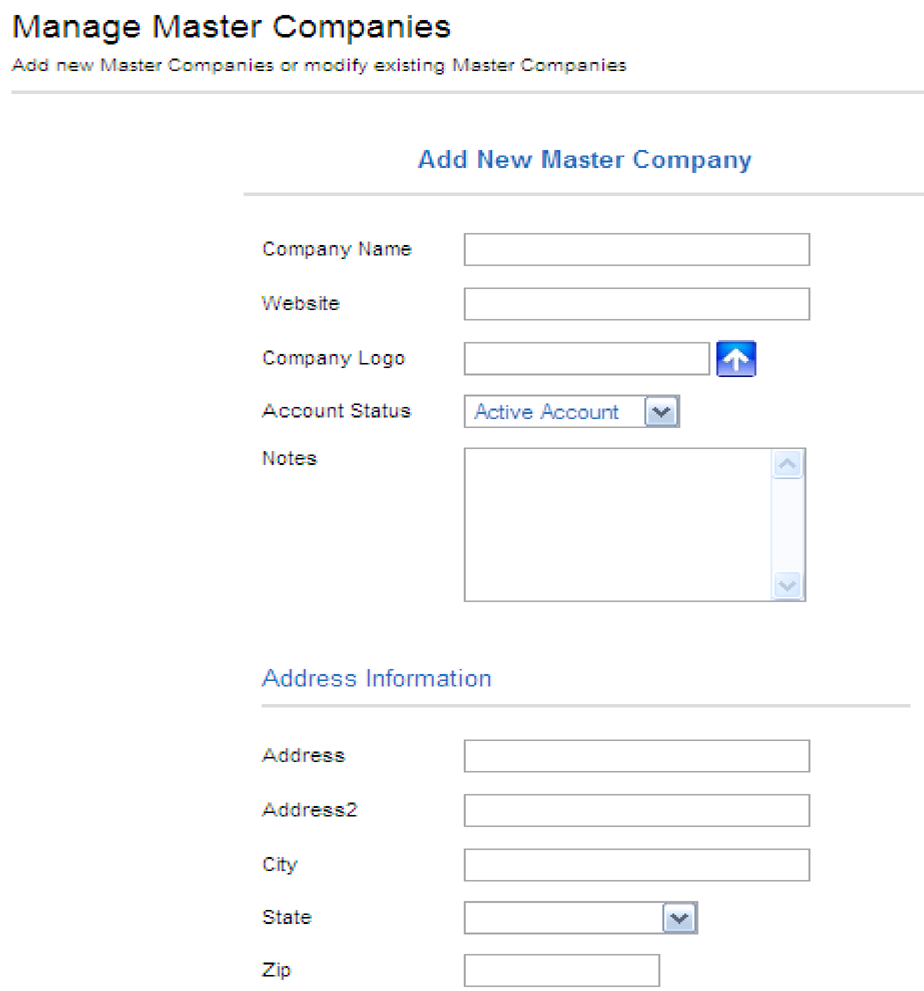
Modify group restrictions:

Group Restriction Name	Group Restriction State
Admin Options	(•) Allow ( ) Restrict
Admin: Users Options	(•) Allow ( ) Restrict
Admin Users: Add Public User	( ) Allow (•) Restrict
Admin Users: Modify Master Company	( ) Allow (•) Restrict
Admin Users: Modify Company to View	( ) Allow (•) Restrict
Admin: Inventory Options	(•) Allow ( ) Restrict
Admin Inv: Category Options	( ) Allow (•) Restrict
Admin Inv: Add Items	( ) Allow (•) Restrict
Admin Inv: Modify Items	(•) Allow ( ) Restrict
Admin Inv: Add/Modify Additional Images	( ) Allow (•) Restrict
Admin Inv: Receive / Adjust Options	( ) Allow (•) Restrict

Select the features you would like this group to be able to utilize and save your changes.

To Add/Modify Master Companies
(Master Companies are only available to Corporate Admin)

This is where a Primary System client is added:



1. Add Master Company and save then Modify your New Company and assign Restrictions **(what they have permission to do)**

2. **Add Categories** for this Master Company

3. **Add Users** for your Master Company

4. **Add Products** for your Master Company