XEBRA ECOMMERCE BASIC BUILD CHECK LIST

GunWebSystems
Targeted Web Solutions

CHECK LIST >>

Before you start building your Xebra eCommerce Store, it is recommended that you consider the custom aspects of design and work flow, and most importantly discuss these elements with your client.

Taking the time at the beginning to plan the stores function ensures the build is completed on schedule and in a pre-agreed format with your client.

Build an eCommerce store for internal use and client demonstrations
This store can then be used for internal training purposes, testing and as a demonstration store to sell the platform

Meet with your client, discuss their requirements and give a demo
Use this opportunity to show the layout options, branding capabilities and demonstrate how easy it is to buy an item

Key Questions to ask your clients are outlined below with examples
This will give you a work flow plan to use as a guide to produce an eCommerce store as per your customers requirements

#1 Product Type?

Customer Owned

pre-purchased/held in stock = WAREHOUSE RELEASE

This choice is set up as an ITEM RECORD in Xebra with the addition of CUSTOMER SPECIFIC INVENTORY activated. CUSTOMER SPECIFIC INVENTORY items need to then be assigned/held in a virtual warehouse and quantities are Received.

A unique WAREHOUSE CODE is required for Customer Specific Inventory; we recommend using a number 1 suffix for these to ensure this is not confused with the Master Customer Code.

Any CUSTOMER SPECIFIC INVENTORY items ordered through eCommerce are processed differently to STOCK SALES.

There has to be a stock level against the item for the order to be processed otherwise this is classed as a BACK ORDER.

On processing, the QTY ordered has to be transferred out of the warehouse prior to normal processing.

On Demand Products

no stock held, supply on demand = STOCK SALES

This choice is set up as a normal ITEM RECORD in Xebra then copied into eCommerce into the STOCK SALES Master Catalogue. STOCK SALE eCommerce Orders are then processed and made into a New Job or Added to an Existing Job.

You will still need to create items with codes specific to your client with an eCommerce store to ensure these items are not changed or used in error for other clients.

KEEP IT CLEAN
Use 'clean' text in item titles and long descriptions; text copied from the web can have hidden characters and symbols that corrupt the item in Xebra.

👥 Request a remote assist to see a demo of the Warehouse Release work flow for eCommerce

🛟 Access our Help Portal for How To Videos @ https://gunwebsystems.zendesk.com/hc/en-us

📑 Read the chapter regarding Customer Specific Inventory @ xebra.com/xebraonlinehelp

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#2 Web Users?

One Global Login ☐

You may have one Web User; which means there is only one login for the store.

One Web User is set up with a username and password of your choice (try not to use 'password' or '123'), and this is given to your client to log into their store.

Your client then provides this login information to the members of staff permitted to use the store.

❗ Using one web user/login can only have one email address assigned. Therefore, any orders placed using this login will receive all the order confirmation emails; you may wish to utilise the 'special instructions' field to state who is placing the order. This will be something you will have to arrange with your client.

Multiple Users/Logins ☐

You may have as many web users as you would like, which allows you to customise the permissions for each user; e.g. only see certain products, and keep track of who is ordering what items more efficiently.

RECOMMENDED OPTION should you have franchise sites or mulitple purchasing options for members of staff.

This option also allows you to assign email addresses to each login, so the order confirmation email is sent to the person placing the order.

#3 Payments?

On Account ☐

As with typical orders placed in Xebra, invoices are raised and the items are paid on the pre-arranged terms of the account.

You can maintain this set-up with your client, and simply raise the invoice as usual in Xebra.

You may wish to accumlate the orders placed over the month; by adding eCommerce items to an Existing Job, and then raising one invoice at the close of the month/or designated date.

Otherwise, raise an invoice as each order is placed by creating a new Job in the Order Entry module.

Credit Cards ☐

There is the facility to allow for credit card payments; there are two options:-

Option#1; The client can enter their credit card details which are then sent to you for payment to be processed manually. You can set this functionality up within the eCommerce module. ☐

Option#2; Third party merchant, eWAY can handle all credit card payments via their secure payment portal, instantly. ☐

PLEASE NOTE: You will need to apply for an eWAY Merchant Account, which will incur charges based on their terms and conditions.

www.eway.com.au or www.eway.io/nz

🔓 You will also need to apply for a SSL certificate to ensure all credit card information is encrypted prior to choosing this option. Please liaise with Gun Web regarding this, as SSL setup will incur a setup charge.

🛒 **CHECKOUT OPTIONS >>**

You may also add Shipping Methods to your eCommerce Store, which is added to the CART work flow.

The criteria for shipping is based on a cart total; therefore you can offer multiple shipping options such as Overnight or Same Day Delivery, with pricing tiers based on the total order amount.

Calculate your costings prior to loading into eCommerce.