



Ecomm Wholesaler

USER MANUAL

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1 Preface

This preface describes the document. The preface contains the following sections:

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1.1 Purpose of this Document

The purpose of this document is to provide the fundamental skills necessary to productively use the Wholesaler Module. This document contains descriptions of definitions used in the system as well as in the document and a functional usage guide for the Wholesaler Module. This document is designed to provide a comprehensive, step-by-step introduction to each of the functions of the Wholesaler Module.

1.2 Assumptions

This guide assumes you are using a mouse. At times, based on personal need or circumstances beyond your control, you may need to use the keyboard.

It is assumed you are using a right-handed mouse, so the left button is the primary button. When asked to click or double click, you should use the left mouse button. If you are left-handed use the Control Panel in Windows to reverse the primary key to the right mouse button. Refer to the Microsoft Windows documentation for additional information.

The Wholesaler Module is clear and simple to operate. You do not need to learn confusing concepts or possess any additional technical skills to work with the Wholesaler Module. Of course, you will need to be familiar with the graphical user interface and web browser. However, if you're not accustomed to working with a web browser, mouse, windows, icons, and the other elements of a graphical environment, refer to the tutorial or reference manual for your operating system.

2 About Wholesaler Module

The **Wholesaler Module** is used to setup wholesale information for prospects to apply for a wholesale opportunity.

Features:

- Approval and rejection process
- > Option for automatic approval
- > Automatic emails to applicants and admin.

3 Admin Interface

This chapter describes the **Wholesaler Module – Admin** Interface from the perspective of operational and functional use.

The chapter includes the following sections:

Section	Page
Add Wholesaler Module	6
Publish Module	7
Manage Module	7
Home	8
Wholesalers	9
Settings	13
Show in All Pages	15
Hide Module	15
Delete Module	15

3.1 Add Wholesaler Module

To add the Wholesaler module to the website:

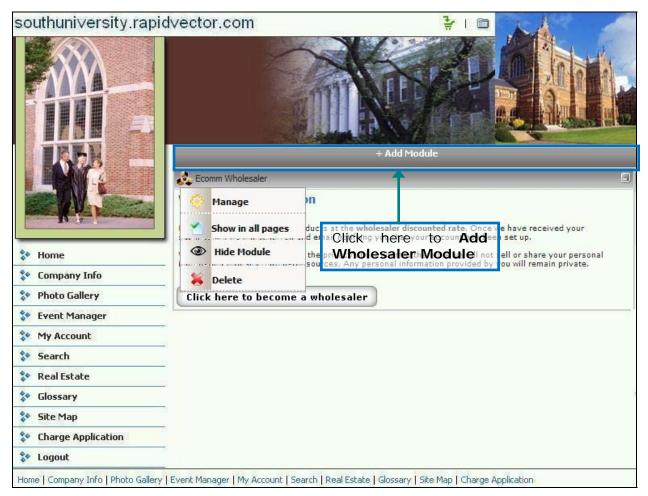


Figure 1 – Add Module

> Click on Add Module button. Add Module screen will open

	Add Mod	lules	201	×
	2	Daily Comics Post a daily joke on your web site for fun and entertainment!	Add	~
		Documents RapidVector™ gives you the best available document management system. The administrator is able to share documents with the users.	Add	
		Ecommerce Sell products and services online using a shopping cart and checkout. You can also manage customer information, order information, and inventory information. Set your taxes and shipping settings as well as your confirmation email to online buyers.	Add	
	-	Ecomm - Category Display Display your product categories on any page	Add	
	*	Ecomm - Product Featured Listing Display your featured products on any page	Add	
		Ecomm - View Cart Allow users to view their shopping cart on any page	Add	
	2	Ecomm Wholesaler Setup wholesale information for prospects to apply for a wholesale opportun Wholesaler Module	Add	
	E.	Event Manager-RSVP R.S.V.P. comes from the French expression "répondez s'il vous plaît" and the meaning is "please respond". The RSVP module makes it possible for the administrator to create / edit / manage events. Additionally, users can register for events and pay online	Add	
		FAQ RapidVector™ developed an FAQ module for those who don't know javascript and would like to add / edit / delete their FAQ's.	Add	
K				

Figure 2 – Add Wholesaler Module

- > Click on de button provided next to Wholesaler to add module to the page
- Once you add the module to the page, mouse-over on Wholesaler icon. Module Functions list will appear.

3.2 Publish Module

Click on **Publish Module** button from the dropdown list to publish module. Only once you have published the module, will it then be visible on the user side. After publishing the module **Publish Module** button will not be available in the dropdown list.

3.3 Manage Module

Manage Module allows admin to configure and edit various parameters of members. The manage module web dialog allows admin to configure various elements of members, which are explained in following pages. Click on Manage button from the dropdown list to edit module.

3.3.1 Home

Home tab provides a brief introduction to what the Wholesaler Module is and what different features are available.

-com	commerce - Wholesalers			
Home	Wholesalers	Setting		
<u>Obje</u>	ctive:			
Setup	wholesale informa	ation for prospects to apply for a wholesale opportunity		
Feat	ures:			
•	Approval and rej	jection process		
	Option for autom	natic approval s to applicants and admin		
	Automatic emails	s to applicants and authin		
Quic	k Help:			
	First, make sure	the Ecommerce module is set up already		
		customize the 6 templates		
•	Go to Wholesaler	rs tab to check on pending approvals and to manage approved wholesalers		

Figure 3 – Wholesaler Home

3.3.2 Wholesalers

Wholesalers tab allows the admin to manage all wholesaler requests. Admin can approve or disapprove the request.

You can perform the following functions from the wholesalers tab:

- Pending Approvals
- Manage Wholesalers.

3.3.2.1 Pending Approvals

Pending Approvals allows you to approve/disapprove wholesalers. From the Wholesalers

tab select ^{Approvals} button from the list. **Pending Approvals** screen will open. You can perform the following functions from Pending Approvals.

- View Pending Wholesalers List
- View Certificate
- Approve Wholesaler
- Disapprove Wholesaler.

me	Wholesalers	Settin	ng			
Pen	ding Approval	s				
W	holesaler Name	•	Company Name 🔻	Resale Certificate	Approve	Disapprove
Anai	ida Dislin		Globel SoftWeb		3	2
			Globel Softwares			(h)

Figure 4 – Wholesalers: Pending Approvals

View Pending Wholesaler List

You can view pending wholesaler list from pending approvals. You can view wholesaler name, company name, and certificate if any. From the pending approvals you can approve/disapprove wholesaler, view the certificate, by clicking on wholesaler name or company name you can sort the list.

- Pagination (Next Previous): Site shows number of pages at bottom of the screen. If number of pages are more than one, then it will appear 3 1 2 3 4..
 buttons to move around the pages. It will show viewing page at bottom of the page
 - Click on page number to go on particular page
 - Click on 🕙 button to view the next page

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- Click on ²⁰ button to view last page
- Click on Substant to go back to the previously viewed page
- Click on ^{SS} button to go to first page
- Alternatively. Enter the page number in Go to Page text box and click on button to go to particular page.

View Certificate

From **Pending Approvals** click on **I** button to view certificate.

Approve Wholesaler

From **Pending Approvals** click on **W** button to approve wholesaler.

- > "Are you sure you want to approve this wholesaler?" message will appear
- > Click **OK** button to approve the wholesaler otherwise click on **Cancel** button
- "Approved Successfully..." message will appear. Approved wholesaler will appear in manage wholesaler list.

Disapprove Wholesaler

From **Pending Approvals** click on button to disapprove wholesaler. **Disapprove Request** screen will open.

ome Wholesalers	lesalers Setting		
Disapprove Reques	t		
			Back
Personal Information			
Name:	Anaida Dislin		
Company Name:	Globel SoftWeb		
Reason for Disapprove *	Do not have all required documents	~	
		~	
	Confirm		
	Confirm		

Figure 5 – Wholesalers: Pending Approvals: Disapprove Request

- Displays Wholesaler Name
- Displays Wholesaler Company Name
- > Enter Reason for Disapprove in text area. It is a Mandatory field
- Click on <u>Confirm</u> button to disapprove the wholesaler. Selected wholesaler will be removed from the list. Rejected email will be sent on wholesaler's email address which was given at the time of registration.



3.3.2.2 Manage Wholesalers

Manage Wholesalers allows admin to manage existing wholesalers. From Wholesalers

tab select Manage Wholesalers button from the list. Wholesaler Management screen will open. You can perform the following functions from Wholesaler Management.

- View Wholesaler List
- Search Wholesaler
- View Certificate
- Change Status of Wholesaler.

Wholesaler Management	E		
Search:	60		
Wholesaler Name 🔻	Company Name 🔻	Resale Certificate	Status
Anaida Dislin	Globel SoftWeb		3
Caterina Peter	Globel Softwares		3
NOTE			
> This indicates approve	wholesaler. Yon can click on the icon to d	isapprove wholesaler's status	

Figure 6 – Wholesalers: Wholesaler Management

View Wholesaler List

You can view wholesaler list from wholesaler management. You can view wholesaler name, company name, status of the wholesaler, resale certificate. From the wholesaler management you can search wholesaler, change the status of wholesaler and view resale certificate.

- Pagination (Next Previous): Site shows number of pages at bottom of the screen. If number of pages are more than one, then it will appear
 1 2 3 4..
 buttons to move around the pages. It will show viewing page at bottom of the page
 - o Click on page number to go on particular page
 - Click on log button to view the next page
 - Click on Web button to view last page
 - Click on S button to go back to the previously viewed page
 - Click on so button to go to first page

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 Alternatively. Enter the page number in Go to Page text box and click on button to go to particular page.

Search Wholesaler

From **Wholesaler Management** you can search the wholesaler and a list of all wholesalers will appear. You can search a specific member using search criteria.

- Enter wholesaler name to search
- Click on Go button to find search result. List of wholesaler will appear as per the search criteria.

View Certificate

From Wholesaler Management click on 💷 button to view certificate.

Change Wholesaler Status

Once you approve the wholesaler it will be shown in wholesaler management list. To change the status of wholesaler:

- Reject Wholesaler:
 - It will show [♥] icon for approved wholesaler
 - Click on [♥] icon to reject wholesaler
 - o "Are you sure you want to Reject this wholesaler?" message will appear
 - Click OK button to reject the wholesaler otherwise click on Cancel button.
 Reject Request screen will appear

ome Wholesalers	lesalers Setting		
Disapprove Reques	t		
			Back
Personal Information			
Name:	Anaida Dislin		
Company Name:	Globel SoftWeb		
Reason for Disapprove *	Do not have all required documents	~	
		~	
	Confirm		
	Commun		

Figure 7 – Wholesalers: Wholesaler Management: Reject Request

- o Displays Wholesaler Name
- o Displays Wholesaler Company Name
- o Enter Reason for Disapprove in text area. It is a Mandatory field
- Click on Confirm button to disapprove the wholesaler
- [™] icon will appear. Wholesaler status will be rejected
- > Approve Wholesaler:

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- o It will show [№] icon for rejected wholesaler
- Click on **W** icon to approve wholesaler
- "Are you sure you want to Approve this wholesaler?" message will appear
- Click **OK** button to approve the wholesaler otherwise click on **Cancel** button
- I icon will appear. Wholesaler status will be approved.

3.3.3 Settings

Settings tab allows admin to manage Wholesaler module settings. From settings you can set:

- > Wholesaler information page layout
- Registration confirmation mail template
- > Registration confirmation mail template for admin
- Thank you page confirmation layout
- User approved mail template
- User disapproved mail template
- > Approve automatically.

Wholesaler Information page Layout Registration Confirmation Mail Template Subject : Confirmation of wholesaler request Image: I	ie V	Wholesalers	Setting	
Registration Confirmation Mail Template Subject : Confirmation of wholesaler request Image:	etting	s		
Registration Confirmation Mail Template Subject : Confirmation of wholesaler request Image:				
Subject : Confirmation of wholesaler request Image: Ima) Who	lesaler Info	rmation page Layout	
Registration Confirmation Mail Template For Admin Address1 (Address1) (Address2) (Address2) (Address2) (Address2) (Address2) (Address2) </th <th>Regi</th> <th>stration Con</th> <th>ifirmation Mail Template</th> <th></th>	Regi	stration Con	ifirmation Mail Template	
B I A Font Name Siz Mail Merge Deer Over [WHOLESALER_NAME], Thank you very much for sending request for wholesaler at [SITE_NAME]. Please check the details you send us. Name: Name: [NAME] Company Name: [COMPANY_NAME] Reseller Certificate Number: [CERTIFICATE_NO] Certificate: [VIEW_CERTIFICATE] Email: [EMAIL] Address1 (CERTIFICATE] Email: [CANDRESS1] * * * © © Thank you page Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically	Subje	ect :	Confirmation of wholesaler request	
B I A Font Name Siz Mail Merge Deer Over [WHOLESALER_NAME], Thank you very much for sending request for wholesaler at [SITE_NAME]. Please check the details you send us. Name: Name: [NAME] Company Name: [COMPANY_NAME] Reseller Certificate Number: [CERTIFICATE_NO] Certificate: [VIEW_CERTIFICATE] Email: [EMAIL] Address1 (CERTIFICATE] Email: [CANDRESS1] * * * © © Thank you page Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically	13	3 🖪 Ø 🤇) 🔮 🖻 •	*=
A + Font Name Siz * 11px Apply CSS Cl * Custom Links Paragraph St * Mail Merge Dear [WHOLESALER_NAME], Thank you very much for sending request for wholesaler at [SITE_NAME]. Please check the details you send us. Name: [INAME] Company Name: [COMPANY_NAME] Reseller Certificate Number: [COMPANY_NAME] Reseller Certificate Number: [COMPANY_NAME] Reseller Certificate: [VIEW_CERTIFICATE] Email: [EMAIL] Address1 (Address1] Address1] (Address1] (Address2]	I	3 I <u>U</u> +		
Mail Merge Dear [WHOLESALER_NAME], Thank you very much for sending request for wholesaler at [SITE_NAME]. Please check the details you send us. Name: [NAME] Company Name: [COMPANY_NAME] Reseller Certificate Number: [COMPANY_NAME] Reseller Certificate Number: [CERTIFICATE_NO] Certificate: [VIEW_CERTIFICATE] Email: [EMAIL] Address1 [ADDRESS1] Address1 [ADDRESS1] Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically		• F		
Dear [WHOLESALER_NAME], Thank you very much for sending request for wholesaler at [SITE_NAME]. Please check the details you send us. Name: [NAME] Company Name: [COMPANY_NAME] Reseller Certificate Number: [CCRTIFICATE_NO] Certificate: [VIEW_CERIFICATE] Email: [EMAIL] Address1 [ADDRESS1] * * * * * * Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically	M	Iail Merge		
Thank you very much for sending request for wholesaler at [SITE_NAME]. Please check the details You send us. Name: [NAME] Company Name :: [COMPANY_NAME] Reseller Certificate Number :: [CERTIFICATE_NO] Certificate: ![VIEW_CERTIFICATE] Email: ![EMAIL] Address1 (Address1] Address1] * Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically			ESALER NAME],	*
Name: [NAME] Company Name: [COMPANY_NAME] Reseller Certificate Number: [CERTIFICATE] Certificate: [VIEW_CERIFICATE] Email: [EMAIL] Address Information Address1 [ADDRESS1] Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template				
Name: [INAME] Company Name: [COMPANY_NAME] Reseller Certificate Number: [CERTIFICATE_NO] Certificate: [VIEW_CERIFICATE] Email: [EMAIL] Address Information Address I [ADDRESS1] Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically				
Company Name: Reseller Certificate Number: [CERTIFICATE_NO] Certificate: [VIEW_CERIFICATE] Email: [EMAIL] Address Information Address1 (Address1) * *> © Imail: Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Value: Approve Automatically		you send us		
Certificate:::[VIEW_CERIFICATE] Email::[EMAIL] Address Information Address1 (ADDRESS1]		h		
Email: [EMAIL] Address Information Address1 [ADDRESS1] * ** Address1 (ADDRESS1] * ** Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template User Disapproved Mail Template		Reseller	Certificate Number : [CERTIFICATE_NO]	
Address Information Address I [ADDRESS1]		Į		
Address1 Addres		L	Emaily: [EMAIL]	
 Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically 		1,	Address Information	
 Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically 			[ADDRESS1]	*
 Registration Confirmation Mail Template For Admin Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically 	1	A	D /A	-
 Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically 				
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 Thank you page Confirmation Layout User Approved Mail Template User Disapproved Mail Template Approve Automatically 	Pegi	stration Con	firmation Mail Template For Admin	
User Approved Mail Template User Disapproved Mail Template Approve Automatically	Keyn	stration con		
Vser Disapproved Mail Template Approve Automatically	🤭 Than	ik you page	Confirmation Layout	
Approve Automatically	User	Approved N	Mail Template	
Approve Automatically	User	Disapprove	ed Mail Template	
		1920 00 00 00 00 00 00 00 00 00 00 00 00 0		
Save Click here to	V Ann			
Save changes	App	orove Autom		

Figure 8 – Settings

- Click on link to modify particular template
 Click on check box to approve wholesaler automatically
- Save button to save the settings. Click on

3.4 Show in All Pages

Click on **Show in all pages** button from the dropdown list. Module will be added to all page of the site. Click on button to reverse the effect.

3.5 Hide Module

Click on Will be hidden. Click on button to reverse the effect.

3.6 Delete Module

Click on **Solution** Delete button from the dropdown list to delete module from the site. **'Are you sure you want to delete this Module?'** message will appear. Click on **Ok** button to delete module other wise click on **Cancel** button.

4 User Interface

This chapter describes the **Wholesaler Module – User Interface** from the perspective of operational and functional use. Wholesaler Module home page shows wholesaler information.

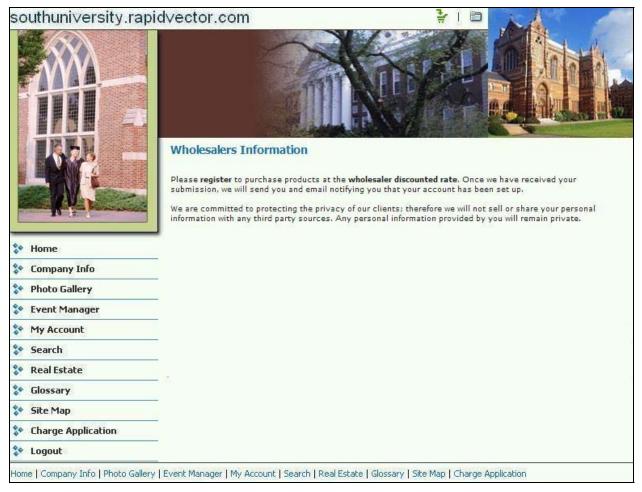


Figure 9 – User Side: Information Page

Click on Click here to become a wholesaler button to register to become a wholesaler. New Wholesaler's Registration form will appear

southuniversity.rapi	dvector.com	¥10 KA
		New Wholesaler's Registration
	PERSONAL INFORMAT	(*) Required Fields TON
	Name:*	Caterina Peter (First Name) (Last Name)
	Company Name:*	Globel Softwares
	Reseller Certificate Number:*	RS222
	Upload Certificate:	D:\Mauli - Do Not Touch - I Browse
🐓 Home	E-mail Address:*	caterina@jctweb.com
😵 Company Info	Password:*	******
💸 Photo Gallery	Retype Password:*	******
💱 Event Manager	Security Question:*	What is your pet's name?
💱 My Account	Answer:*	cats
💱 Search	BILLING ADDRESS	
💱 Real Estate	Address1:*	123, Any Softwares
😵 Glossary	Address2:	Any tower
💱 Site Map	City:*	St. Petburgs
💝 Charge Application	Country:	United States
🐓 Logout	State:	California
	Zip:*	253256
	Phone:*	0112587954256
	Fax:	0112568744415
	SHIPPING ADDRESS	
	Same as Billing A	ddress
	Address1:*	123, Any Softwares
	Address2:	Any tower
	City:*	St. Petburgs
	Country:	United States
	State:	California
	Zip:*	253256
	Phone:*	0112587954256
	Fax:	0112587954256
		REGISTER NOW
Home Company Info Photo Gallery	Event Manager My Acc	ount Search Real Estate Glossary Site Map Charge Application

Figure 10 – User Side: New Wholesaler's Registration Form

- Fill up all details
- > Click on **Register Now** button. Confirmation page will appear.

southuniversity.rapi	dvector.com	
	Dear Caterina, THANK YOU FOR YOUR REGISTRATION. WE WILL GET BACK TO YOU SOON.	
Stevense Home		
😵 Company Info		
😵 Photo Gallery		
💱 Event Manager		
💱 My Account		
💱 Search		
💱 Real Estate		
💱 Glossary		
💱 Site Map		
Charge Application		
😵 Logout		

Figure 11 – User Side: Confirmation

Once you click on '*Register Now*' your request will be sent to admin for approval.