



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:

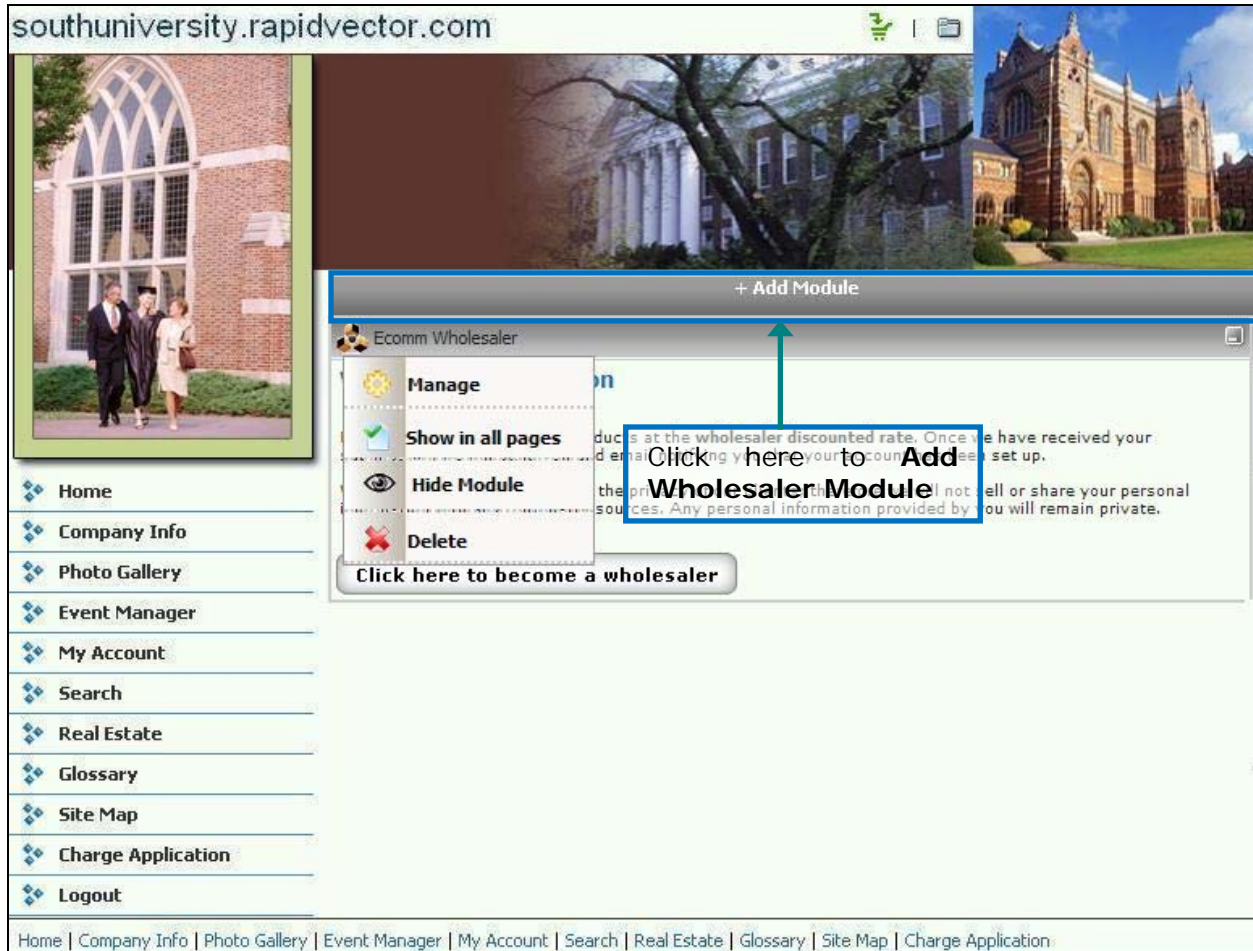


Figure 1 – Add Module

- Click on **Add Module** button. **Add Module** screen will open

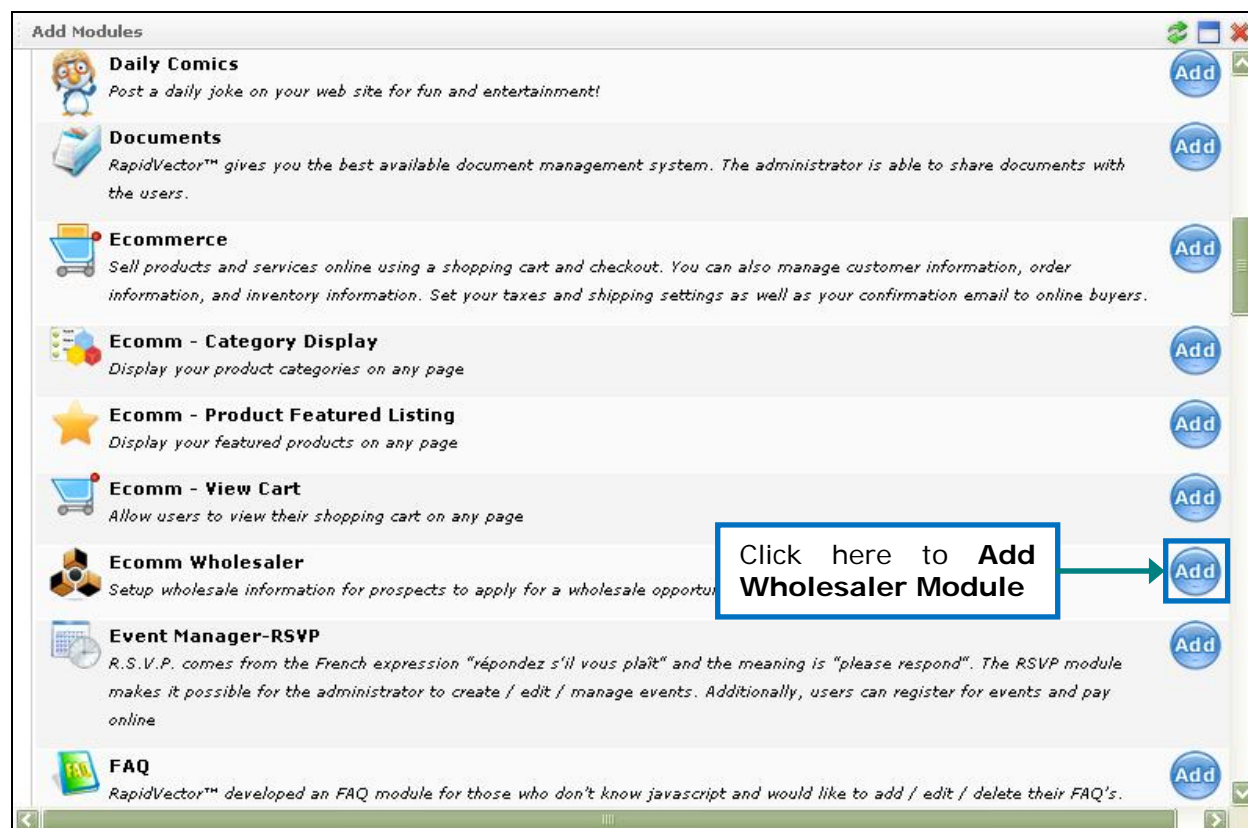






Figure 2 – Add Wholesaler Module

- Click on  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

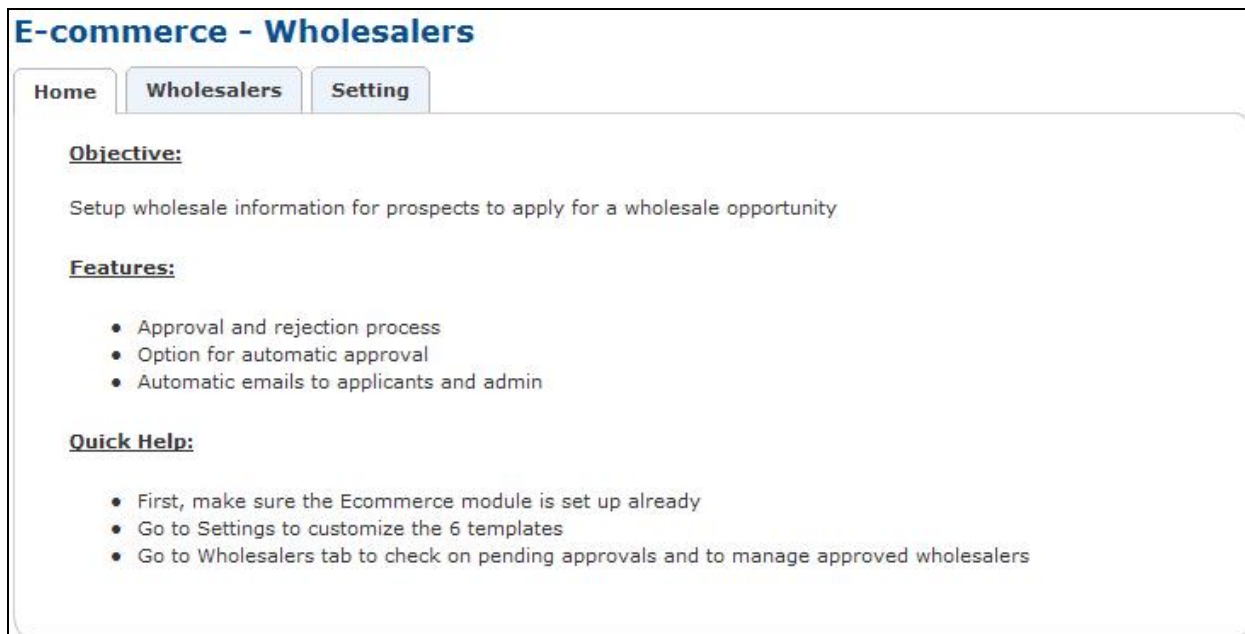
Click on  **Publish Module** button from the dropdown list to publish module. Only once you have published the module, will it then be visible on the user side. After publishing the module  **Publish Module** button will not be available in the dropdown list.

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.



The screenshot shows a web interface titled "E-commerce - Wholesalers". At the top, there are three tabs: "Home", "Wholesalers", and "Setting". The "Home" tab is selected. Below the tabs, the page is divided into three sections:

- Objective:**
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
- Quick Help:**
 - First, make sure the Ecommerce module is set up already
 - Go to Settings to customize the 6 templates
 - Go to Wholesalers 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  **Pending 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.







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 **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

- Click on  button to view last page
- Click on  button to go back to the previously viewed page
- Click on  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  button to view certificate.

Approve Wholesaler

From **Pending Approvals** click on  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.



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  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.




E-commerce - Wholesalers

Home Wholesalers Setting

Wholesaler Management

Search:

Wholesaler Name	Company Name	Resale Certificate	Status
Anaida Dislin	Globel SoftWeb		
Caterina Peter	Globel Softwares		

NOTE











-  This indicates approve wholesaler. You can click on the icon to disapprove wholesaler's status.
-  This indicates cancel wholesaler. You can click on this icon to re-approve 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
 - Click on page number to go on particular page
 - Click on  button to view the next page
 - Click on  button to view last page
 - Click on  button to go back to the previously viewed page
 - Click on  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.

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
 - **“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



E-commerce - Wholesalers

Home Wholesalers Setting

Disapprove Request Back


Personal Information




Name: Anaida Dislin

Company Name: Global SoftWeb

Reason for Disapprove *

Figure 7 – Wholesalers: Wholesaler Management: Reject Request

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

- It will show  icon for rejected wholesaler
- Click on  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
-  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.

E-commerce - Wholesalers

Home Wholesalers **Setting**

Settings

Wholesaler Information page Layout

Registration Confirmation Mail Template

Subject : Confirmation of wholesaler request

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: [CERTIFICATE_NO]

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


Approve Automatically

Save ← Click here to **Save** changes


Figure 8 – Settings

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


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  **Hide Module** button from the dropdown list. Module will be hidden. Click on button to reverse the effect.

3.6 Delete Module

Click on  **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.

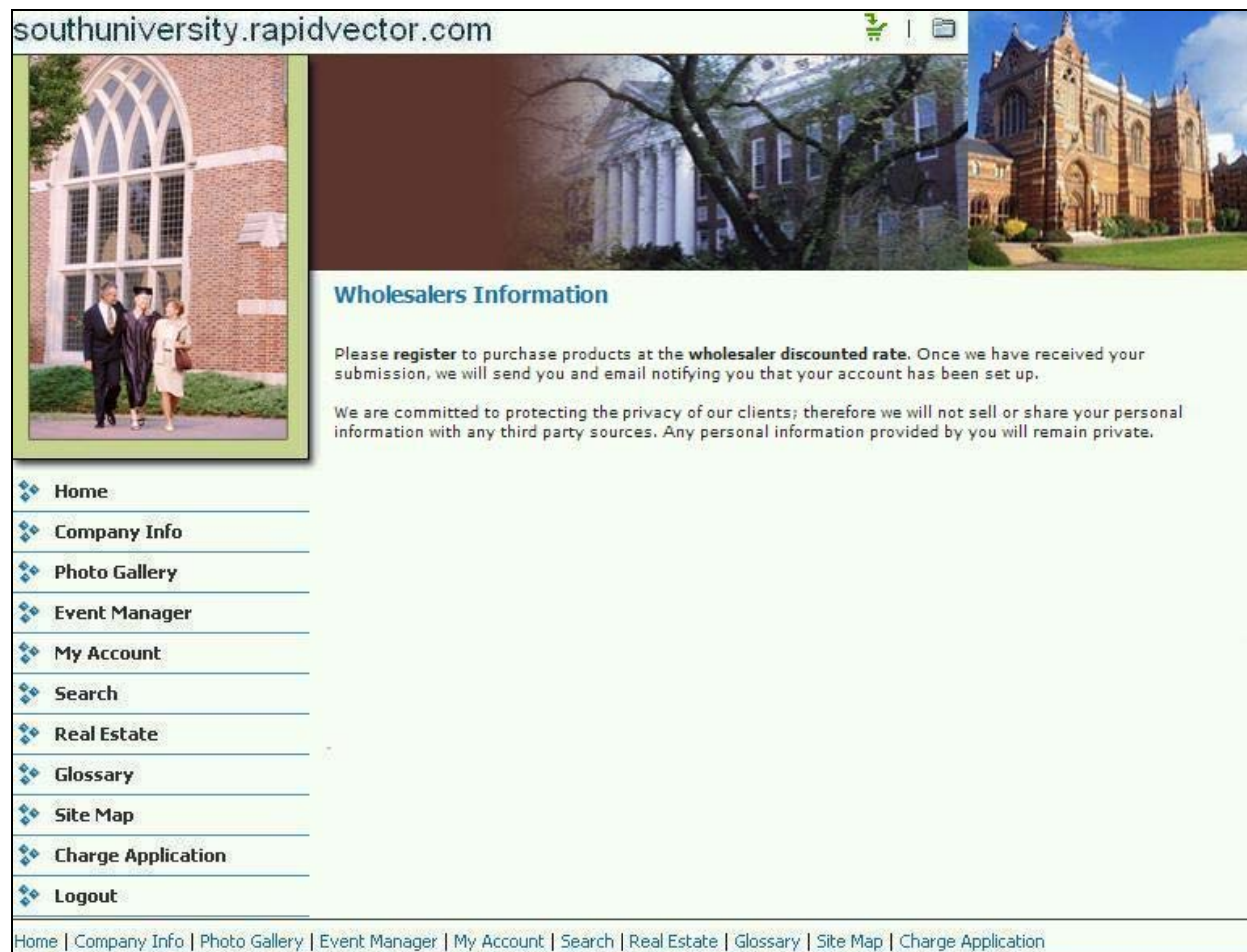



Figure 9 – User Side: Information Page

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

southuniversity.rapidvector.com



New Wholesaler's Registration

(*) Required Fields

PERSONAL INFORMATION

Name: *
(First Name) (Last Name)

Company Name: *

Reseller Certificate Number: *

Upload Certificate:

E-mail Address: *

Password: *

Retype Password: *

Security Question: *

Answer: *

BILLING ADDRESS

Address 1: *

Address 2:

City: *

Country:

State:

Zip: *

Phone: *

Fax:

SHIPPING ADDRESS

Same as Billing Address

Address 1: *

Address 2:

City: *

Country:

State:

Zip: *

Phone: *

Fax:

Home | Company Info | Photo Gallery | Event Manager | My Account | 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.

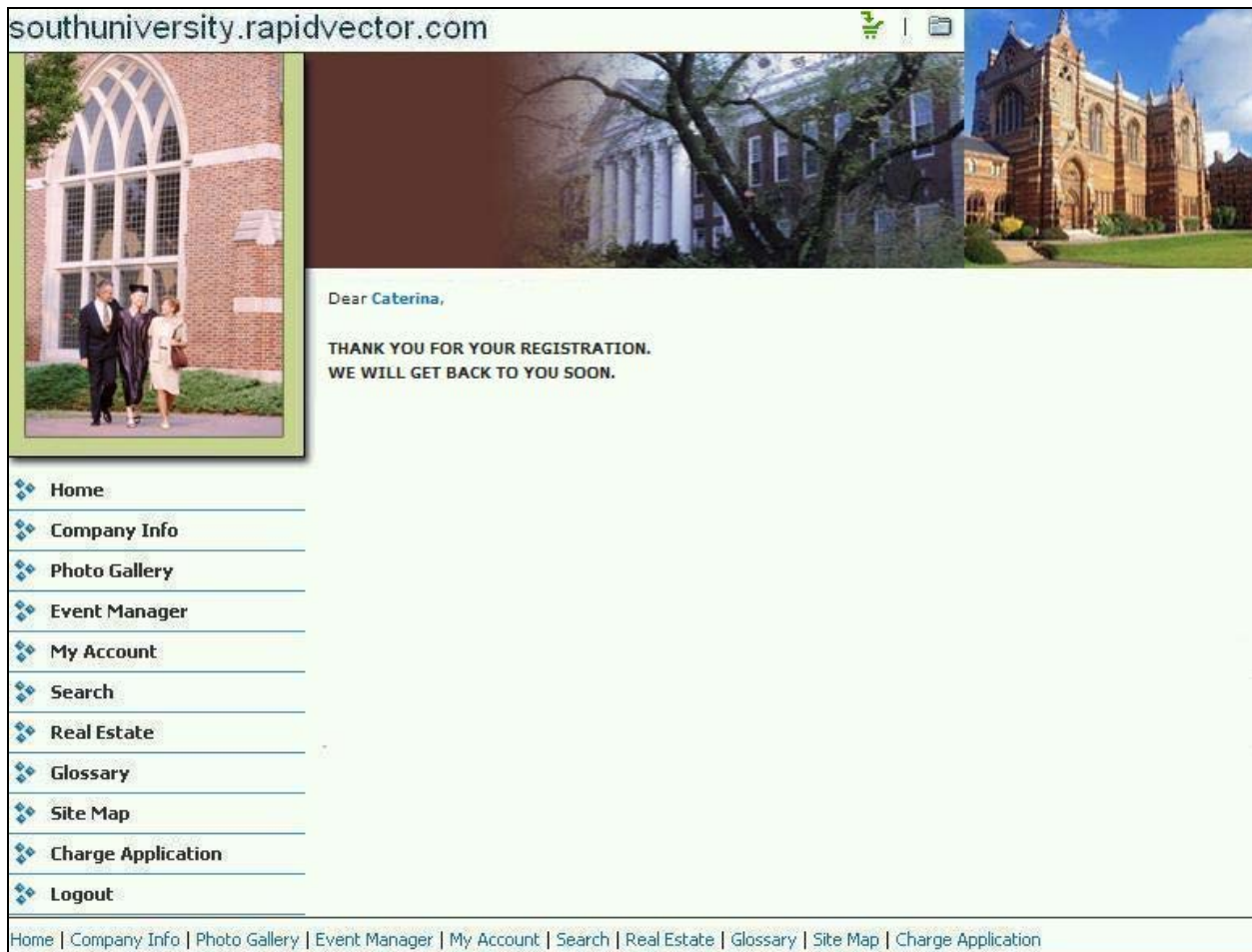


Figure 11 – User Side: Confirmation

Note:

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