

Sales Area	Name	Group
<input type="checkbox"/> NONE	None	DOM
<input type="checkbox"/> NSW	New South Wales	DOM
<input type="checkbox"/> QLD	Queensland	DOM
<input type="checkbox"/> UK	United Kingdom	EXP
<input type="checkbox"/> USA	USA	EXP
<input type="checkbox"/> VIC	Victoria	DOM
<input type="checkbox"/> WEB	website Debtors/Mail Orders	DOM

## WEBSITE INTERFACE

Club member details and orders recorded on your website can be automatically recorded in *EzyWine*.

## SALES AREA & REP

A WEB sales area and sales rep needs to be specified.

Sales Rep	Name	Commission %	Group	Active
<input type="checkbox"/> BRUCE	Bruce Davies	0.00	DOM	Yes
<input type="checkbox"/> CD	Cellar Door Sales	1.00	DOM	Yes
<input type="checkbox"/> EXPORT	Export Rep	5.00	EXP	Yes
<input type="checkbox"/> LOZ	Lorraine	0.00	DOM	Yes
<input type="checkbox"/> MCLEODR	Rod McLeod	2.00	DOM	Yes
<input type="checkbox"/> NICK	Nick Cugura	4.00	DOM	Yes
<input type="checkbox"/> NONE	Noel Newman	0.00	DOM	No
<input type="checkbox"/> PICKUP	Pickup	0.00	DOM	Yes
<input type="checkbox"/> WEB	website Mail Orders	0.00	DOM	Yes

## Accounts Receivable

### Accounts Receivable Maintenance

#### Sales Areas

#### Sales Reps

Group	Name	POS Access	Members
MAIL	Mail Orders	Yes	Yes

Type	Open Item	Alias	CLUB
Price Type	Retail	Carrier	EPARCEL
Price Class	CD		
Terms	CASH		
Currency	AUD	GL Accounts:	
Discount	CLUB	Bank	
Category	BHVI	Control	
Sales Rep	WEB	Sales	10-050
Sales Area	WEB	T/Disc	12-060
Credit Rating	GOOD	S/Disc	
Credit Limit	0	COGS	20-050
Cashflow	ARL	GST	
Freight N/S		WET	

## DEBTOR GROUP DEFAULTS

Within *EzyWine*, the Debtor Group defaults will be used to populate some of the information to be recorded against the Debtor, such as GL accounts, discounts and pricing.

## Accounts Receivable

### Accounts Receivable Maintenance

#### Debtor Groups

## Multiple Clubs

If you have more than one club with variations in information such as pricing, discounts and category, then multiple Debtor Groups will need to be created and the website will need to assign the appropriate group.

## Freight & Payment Details

This information should be captured on the website when processing an order.

***M/Order: WEB, Auto Import File Path***

Specify the folder on the server (main computer where *EzyWine* is installed) where the import files can be found.

The default is ..\tmp\

***M/Order: WEB, Auto Debtor File Prefix***

Specify the prefix for the debtor file generated.

If, for example, the prefix is DEBTOR, then the website will need to write a CSV file that is prefixed accordingly.

eg. DEBTORddmmyyyyhhmmss.csv.

***M/Order: WEB, Auto Debtor Import Format******EZYEMAIL***

Implies that the debtor email address of the club member is the unique identifier and the standard Ezy Systems format is to be used.

***EZYCODE***

Implies that the debtor code is the unique identifier.

Both of these options use the following format:

<b><u>Column/Field</u></b>	<b><u>Max Length</u></b>	<b><u>Note</u></b>
A id	8	not mandatory
B debtor code	8	<b><i>mandatory</i></b> if <i>EZYCODE</i>
C name	30	<b><i>mandatory</i></b>
D group	4	<b><i>mandatory</i></b>
E salutation	30	not mandatory
F first name	30	not mandatory
G last name	30	not mandatory
H email	60	<b><i>mandatory</i></b> if <i>EZYEMAIL</i>
I birth date	dd/mm/yyyy	not mandatory
J fax	30	not mandatory
K phone1	30	not mandatory
L phone2	30	not mandatory
M phone3	30	not mandatory
N address 1	30	not mandatory
O address 2	30	not mandatory
P address 3	30	not mandatory
Q postcode	5	not mandatory
R delivery1	30	not mandatory
S delivery2	30	not mandatory
T delivery3	30	not mandatory
U delivery4	30	not mandatory.

**WEBSITE INTERFACE (Cont'd)****SYSTEM PARAMETERS**

There are several system parameters that need to be set.

**Note:** The website *will* need to populate some of the fields;

- merge the first & last name to populate the name field
- record address, city and state against adr1, 2 and 3.

On inserting new members into *EzyWine*, the Debtor's *start date* will be set to today's date.

***M/Order: WEB, Auto Order Import Format******EZY***

The standard format for mail orders.

<b><u>Column/Field</u></b>	<b><u>Max Length</u></b>	<b><u>Note</u></b>
A order no	8	not mandatory
B debtor code	8	<b><i>mandatory if using code</i></b>
C email	60	<b><i>mandatory if using email id</i></b>
D order date	dd/mm/yyyy	<b><i>mandatory</i></b>
E customer ref	16	not mandatory (web order no)
F desp date	dd/mm/yyyy	<b><i>mandatory</i></b>
G delivery1	30	not mandatory
H delivery2	30	not mandatory
I delivery3	30	not mandatory
J delivery4	30	not mandatory
K line type	1	<b><i>s=stock, n=non-stock</i></b>
L code	12	<b><i>stock/non-stock code</i></b>
M qty	13.4	> 0
N unit	4	<b><i>mandatory</i></b>
O price	12.4	> 0
P location	4	<b><i>mandatory</i></b>
Q receipt type	6	<b><i>Visa, M/Card, AMEX...</i></b>
R amount	12.2	> 0
S card no	16	mandatory
T card expiry	mm/yy	mandatory
U card name	30	mandatory
V phone no	30	not mandatory
W message1	30	not mandatory
X message2	30	not mandatory
Y message3	30	not mandatory
Z message4	30	not mandatory

***M/Order: WEB, Auto Order File Prefix***

Specify the prefix for the mail order file generated.

If, for example, the prefix is ORDER, then the website will need to write a CSV file that is prefixed accordingly.

eg. ORDERddmmyyyyhhmmss.csv

***M/Order: WEB, Auto Import Notify User Id***

Specify the User Id to be notified when new debtor, changes to debtors and mail orders recorded on the web are imported.

This user will also be notified of any issues with the imports.

***M/Order: Entry, Order Type Default***

The order type recorded against this system parameter will be recorded against the mail order.

**WEBSITE INTERFACE (Cont'd)****SYSTEM PARAMETERS (Cont'd)*****M/Order: WEB, New Debtor Code Prefix***

Specify a single alphabetic character (such as 9 or Z) that is to be used as the first character for Debtor codes.

When a new member is being created in EzyWine, the Debtor code will be determined as follow;

Prefix +  
First 4 characters of surname +  
First letter of first name +  
Next occurrence of that code.

In the example of Nick Cugura, the Debtor code is ZCUGUN01.



*Mailing List Registration*

Email:

Password:

Confirm password:

First Name:

Last Name:

Phone Number:

Fax:

Address:

Address Line 2:

City:

State:

Postcode:

Country:

Security code:

Which number is highest 63 or 81?

**Register**

*Thank you for registering*

You can now **login** and update your **profile** if you made a mistake or want to have the confirmation email sent to you again.

**You will need to validate your email by clicking on the link sent to the email address you used for registration before gaining access to this **protected page**.**

## WEBSITE INTERFACE (Cont'd)

To illustrate the concept, we are going to look at Big Hill Vineyard, which is owned by the two directors of Ezy Systems, Peter Ellis and Nick Cugura.

Big Hill doesn't actually require a wine club, but it does offer a mailing list for those interested in knowing about *specials* and *upcoming events*.

### Identification

Each member will need a unique identifier such as;

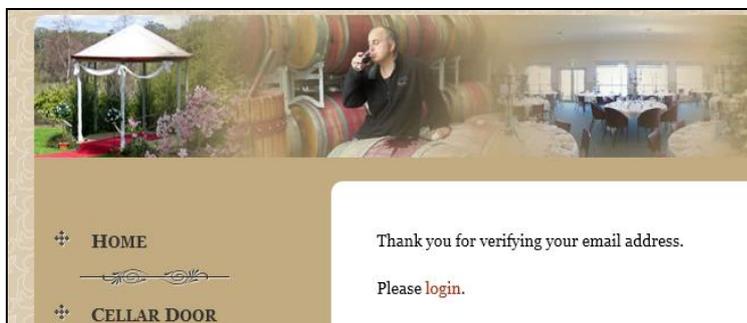
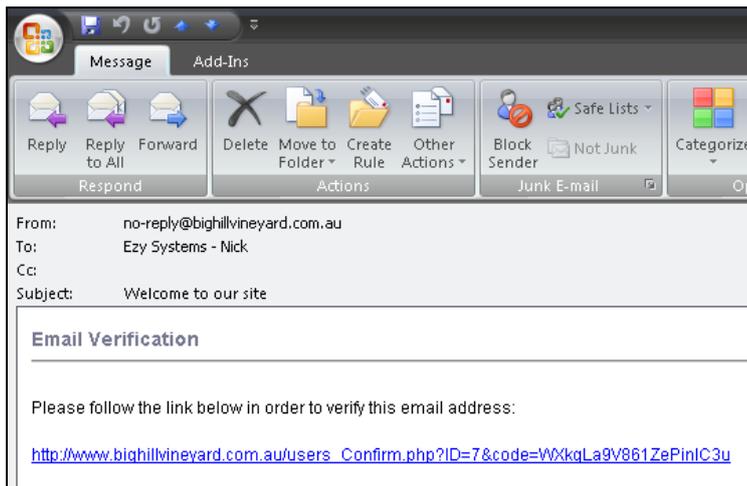
- Email address
- Member code (eg. ZCUGUN01).

The Big Hill Vineyard registration requires both an email address and a password.

### Validation

Password and address details such as state could be validated.

On successfully recording their details, notify the member that an email will be sent to them to complete the registration.



**IMPORTING INTO EZYWINE**

**Sales Ordering & Invoicing**

**Sales Administration**

**Import Web Debtors/Mail Orders**

This option can be utilised to manually import the debtors and orders recorded on the website. It can also be scheduled to run periodically (automatically) as explained later in these notes.

**WEBSITE INTERFACE (Cont'd)**

An email is sent to the member to confirm their registration and a csv file is created for importing into *EzyWine*.

**Debtor CSV file**

The csv file provided by the website will need to include the Debtor Group.

Within *EzyWine*, the Debtor Group defaults will be used to populate some of the information to be recorded against the Debtor, such as GL accounts, discounts and pricing.

The file format will be determined by system parameter "M/Order: WEB, Auto Debtor Import Format".

**Order CSV File**

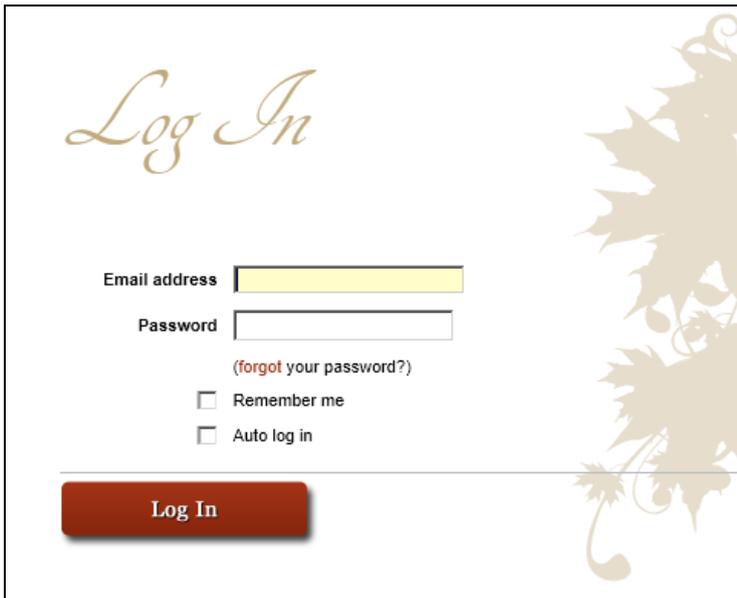
The csv file provided by the website will need to reconcile with the appropriate format recorded against system parameter "M/Order: WEB, Auto Order Import Format".

**Auto File Fetcher**

The fetching of the CSV files from the website can be done by the website developer or your network manager.

FTP (file transfer protocol) is used to schedule getting the files from your website and saving them on your server.

**Note:** The files need to be deleted from the website once downloaded so as to avoid duplicates.



*Log In*

Email address

Password

(forgot your password?)

Remember me

Auto log in

### WEBSITE INTERFACE (Cont'd)

#### Maintaining Debtor Details

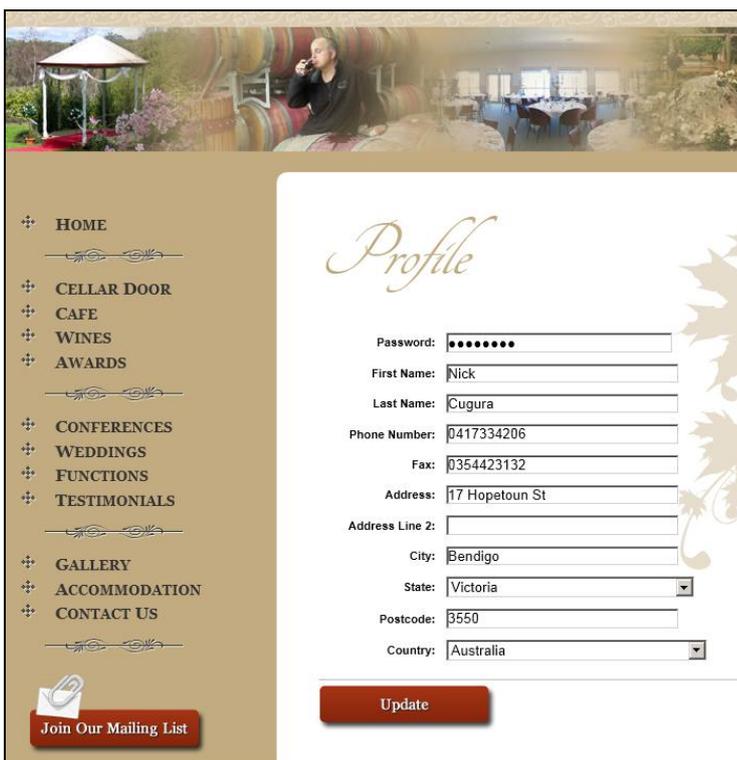
Changes to member contact details should be recorded on the website, regardless of whether the club member or a staff member at Big Hill Vineyard is to make the change.

The member will need to login.



User Profile **Login** Logout

Managed By



- HOME
- CELLAR DOOR
- CAFE
- WINES
- AWARDS
- CONFERENCES
- WEDDINGS
- FUNCTIONS
- TESTIMONIALS
- GALLERY
- ACCOMMODATION
- CONTACT US

### *Profile*

Password:

First Name:

Last Name:

Phone Number:

Fax:

Address:

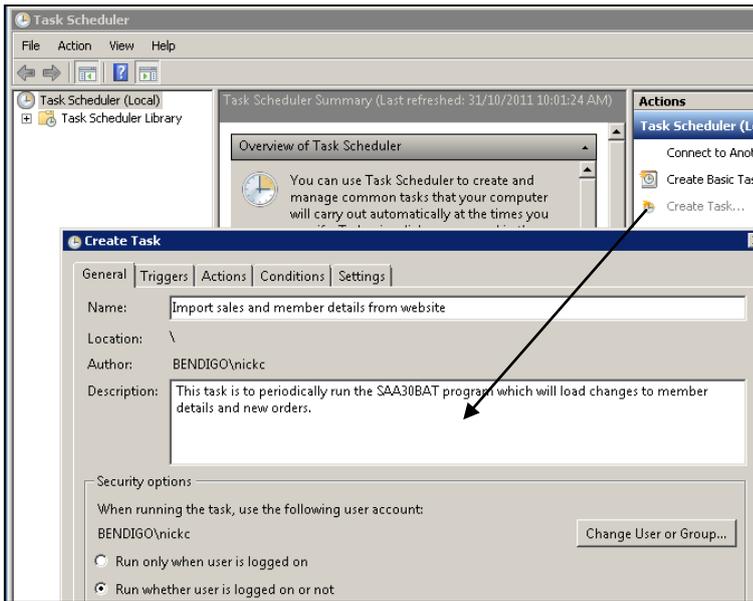
Address Line 2:

City:

State:

Postcode:

Country:

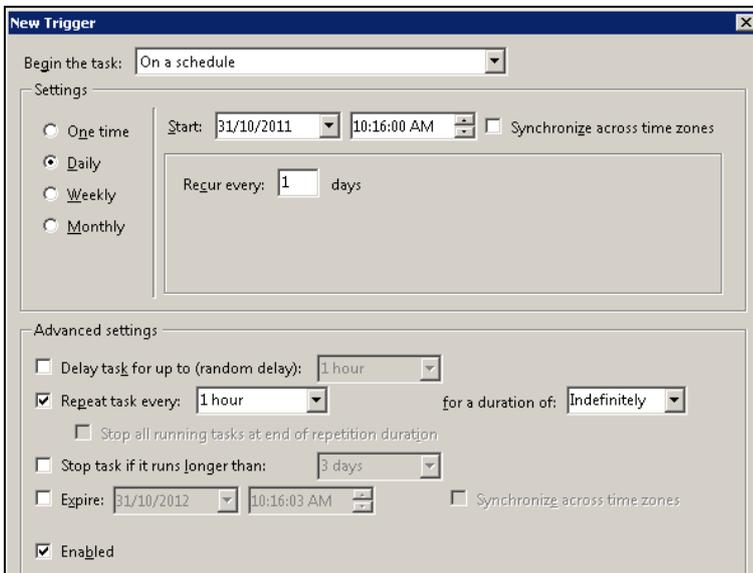


## WEBSITE INTERFACE (Cont'd)

### Scheduled Importing

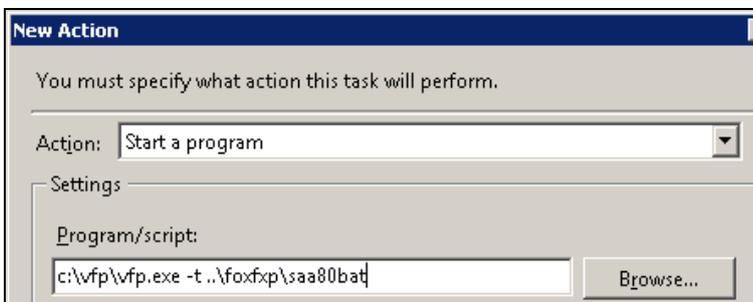
Similar to the scheduling of rebuild index, as explained in the Overview training notes, the importing of members and orders needs to be scheduled.

**Note:** You need to be logged on to the server as *Administrator* to record a task to be scheduled.



## TRIGGERS

Specify how often windows is to run the Import Sales Dockets option.



## ACTION

**Note:** You will need to then modify the scheduler to start in the database (data) folder. Refer to the **Start in:** folder recorded against properties for your desktop short cut to access *EzyWine*.

The Program/script is basically telling windows to run the *Sales Administration, Import Web Debtors/Mail Orders* option as a task.