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# Overview - eCommerce Integration

Why invest in eCommerce? The majority of customers expect to find product information online before they buy. This is not a fad. It represents a permanent shift in consumer behavior. Many bicycle retailers have learned that investing in their website produces a greater return on investment than any other marketing activity. In fact, the effectiveness of all other advertising is increased by leading consumers to an impressive website that further convinces them to visit the store.

## How it Works

Ascend integrates with your eCommerce website in the following ways:

- Stock Export for eCommerce (see page 5): Configure Ascend so that updated stock information is exported to your website daily.
- Sales Import for eCommerce (see page 7): Increase stock and reporting accuracy by downloading your eCommerce sales into Ascend.

Contact your eCommerce website provider to set up your website and request the services required for Ascend integration.

For quick answers to frequently asked questions about Ascend's eCommerce integration, see eCommerce Integration Frequently Asked Questions on page 3.

## CHECKLIST: Before Beginning

### Website Setup

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- 1. Contact your eCommerce website provider to verify your website is correctly configured for use with Ascend's eCommerce features.

### Ascend Setup

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- 1. Verify that all store workstations are running Ascend Version 2.2 or later. For assistance upgrading, contact the Ascend Support team at 01908 360150.
- 2. Verify the current accuracy of your Ascend stock quantities. If you are not confident in your Ascend stock quantities, consider performing a full physical stock count or cycle counting products with a high sell through. Obtain a copy of our "Stock Counts: The Complete Guide" booklet for reference:
  1. Login to [www.ascendrms.com](http://www.ascendrms.com).
  2. Click the Downloads link.
  3. In the Download Type column, locate Stock.
- 3. Configure Ascend for eCommerce integration:
  - For exporting stock information to your website, see Appendix A - Stock Export Configuration (see page 14)
  - For importing eCommerce sales, see Appendix B - Sales Import Configuration on page 15.

# eCommerce Integration Frequently Asked Questions

## Q. How does Ascend's integration with my eCommerce website work?

A. Ascend offers the following integration with your eCommerce website:

- **Stock Export for eCommerce (see page 5):** Configure Ascend to automatically update stock information on your website daily.
- **Sales Import for eCommerce (see page 7):** Increase stock and reporting accuracy by downloading your eCommerce sales into Ascend.

## Q. What is the single most important thing I can do to successfully sell online?

A. Maintain an accurate stock. If your stock numbers are not accurate, you could be advertising availability for out-of-stock products. For details on performing stock counts, obtain a copy of our "Stock Counts: The Complete Guide" booklet:

1. Login to [www.ascendrms.com](http://www.ascendrms.com).
2. Click the Downloads link.
3. In the Download Type column, locate Stock.

## Q. How do I ensure my website's product catalog matches my Ascend system?

A. Use Ascend's **Stock Export for eCommerce (see page 5)** feature to update your website daily with Ascend's stock quantities and pricing.

Contact your eCommerce website provider to determine whether additional services are required.

## Q. How can I display my sale pricing on my website?

A. Use Ascend's **Stock Export for eCommerce (see page 5)** feature to update your website daily with pricing information for your Ascend stock.

Contact your eCommerce website provider to determine whether additional services are required.

## Q. Does Ascend update the customer's order status on my website?

A. No, this is not currently a feature provided by the Ascend eCommerce integration.

## Q. When the shipping and billing addresses on an order are different, which address is downloaded?

A. The billing address for orders is downloaded to Ascend. Refer to the order on your eCommerce website for shipping details.

## Q. Does the customer info from the website overwrite my customers in Ascend?

A. No, changes to customer information must be entered manually.

## Q. How does Ascend match the products on my website to the products in my system?

A. When at least one of the following sets of fields are identical, Ascend and your eCommerce provider will automatically match products:

- Ascend UPC and eCommerce Global Trade Item Number (GTIN)
- Ascend Manufacturer Part Number and eCommerce MPN
- (eCommerce Sales Import only) Ascend In-Store SKU and eCommerce Code

**Note:** If more than one identical counterpart is found for a product, the product cannot be matched automatically.

## Q. How do I handle products from suppliers who don't use UPCs or EANs?

A. It is preferable to use UPC, EAN, or GTIN to ensure products can be automatically matched. When this is not possible, Manufacturer Part Number can be used. However, as this is not required to be a unique value, you may be required to manually match this product between Ascend and your eCommerce provider.

## Q. How do I sell gift certificates on my website?

A. Manually create identical placeholder products in both your Ascend system AND eCommerce website. When the sale is downloaded in Ascend, remove the placeholder product and sell the gift certificate(s) as normal.

## Q. I changed the status on the order; why can I still not pick the appropriate status?

A. After updating the status, you must click **[Save]** before the next option is available.

**Q. Why can't I update the status of an eCommerce sale directly to "Completed"?**

A. The Status field was designed to help you best monitor the steps required to process the sale. Since payment must be taken before a sale can be completed, you must select the **Ready to Collect Payment** status first.

**Q. My state does not require tax on internet sales, but a customer is returning an item bought on the website. How do I refund the customer at the same tax rate as they were charged?**

A. After adding the product(s) to the Ascend return, modify the sales item's tax rate.

**Q. How do I refund shipping charges, e.g. if a special order is canceled before it's shipped?**

A. Create a non-stock product in Ascend. Add this product to the return with a negative quantity. Update the sale item price to reflect the shipping charge. If required, modify the sales item's tax rate.

**Q. How can I remove sales from the eCommerce Sales screen?**

A. The eCommerce Sales screen is designed to display a complete history of eCommerce sales processed via Ascend. To remove items, contact the Ascend Support Team at 01908 360150.

1. Login to [www.ascendrms.com](http://www.ascendrms.com).
2. Click the Downloads link.
3. In the Download Type column, locate Ecommerce.

# Stock Export for eCommerce

## In this Chapter:

Configure Ascend Products for Stock Export, see page 5.

Automatic Stock Export for eCommerce, see page 5.

Manual Stock Export for eCommerce, see page 5.

Monitor Stock Export for eCommerce, see page 6.

## Summary:

Displaying your Ascend stock online provides the following benefits for customers:

- View in-store pricing, specials, and availability.
- (Multi-Store Dealers) Determine the most convenient location to purchase a product.

Products that meet at least one of the following criteria are exported to your website:

- **In Stock:** Quantity on hand is greater than zero.
- **On Order:** A quantity of greater than zero on an open purchase order AND is not marked as received.
- **Last Sold within 90 Days:** The product is on a transaction that was completed 90 days or less from the date of your Ascend stock export.
- **On Sale:** The product is on an active sales promotion. For details, see Overview - Sales Promotions.

**IMPORTANT:** Specific configuration for this feature is required, see Appendix A - Stock Export Configuration on page 14.

## Configure Ascend Products for Stock Export

For each product that requires export to your eCommerce website, complete the following configuration:

**Multi-Store Dealers:** A product must be correctly configured for eCommerce at all locations.

1. In the Product Editor, disable the **Hidden** option.
2. In the Product Editor, enable the **eCommerce** option.

**Best Practice:** In the **UPC** field in the Product Editor, verify a valid UPC or EAN is entered. **The UPC field for eCommerce products must contain only numeric characters.**

## Automatic Stock Export for eCommerce

When Ascend is configured for eCommerce Stock Export, stock information is automatically sent to your eCommerce website provider daily. Updated information is sent to eCommerce website providers at 3 AM Greenwich Mean Time (GMT).

## Manual Stock Export for eCommerce

Occasionally, the need to modify a small number of products on your eCommerce website may arise, e.g. a price on your website was incorrect.

**IMPORTANT:** Manually exporting your stock does not:

- Immediately display updated product information on your eCommerce website. You must contact your eCommerce website provider to process the manual export during business hours.
- Add new products to your eCommerce website. New products are only added during the nightly automatic eCommerce stock export.

To manually export products to your eCommerce website:

1. From the **Ascend Desktop**, select the **Integration** menu > **eCommerce Export** > **Upload Files / View History**. The **eCommerce Export File Upload History** screen is displayed.
2. Click **[Upload File]** (button is located at the bottom of the screen).

Ascend RMS eCommerce File Upload History				
Store Name*	Processing Method (Manual/Automatic)	Request Status	Processing Start Time**	Processing End Time**
Ascend RMS (12/11/11)	Automatic	Complete	9/11/2011 7:55:09 PM	9/11/2011 11:38:04 PM
Ascend RMS (12/11/11)	Automatic	Complete	9/10/2011 7:55:14 PM	9/10/2011 11:34:12 PM
Ascend RMS (12/11/11)	Automatic	Complete	9/6/2011 7:55:09 PM	9/6/2011 11:36:05 PM
Ascend RMS (12/11/11)	Automatic	Complete	8/29/2011 7:55:09 PM	8/29/2011 11:26:06 PM
Ascend RMS (12/11/11)	Automatic	Complete	8/22/2011 7:55:10 PM	8/22/2011 11:33:07 PM
Ascend RMS (12/11/11)	Automatic	Complete	8/21/2011 7:55:07 PM	8/21/2011 11:18:07 PM
Ascend RMS (12/11/11)	Automatic	Complete	8/20/2011 7:55:16 PM	8/20/2011 11:24:14 PM
Ascend RMS (12/11/11)	Automatic	Complete	8/19/2011 7:55:14 PM	8/19/2011 11:24:11 PM
Ascend RMS (12/11/11)	Automatic	Complete	8/18/2011 7:55:13 PM	8/18/2011 11:23:11 PM
<b>Total: 225</b>				

**\*1.** The 'Manual' update process can be triggered in either a Single-Store or a Multi-Store setup.  
**1a.** In a Single-Store dealership, if the update process is set to 'Manual' that single store location will trigger the upload, and be listed under the 'Store Name' column.  
**1b.** In a Multi-Store dealership, if the update process is set to 'Manual' either the Primary Store Location or the Secondary Store locations will be able to trigger the upload. Only the Primary 'Store Name' will be listed under the column, regardless if the upload was triggered from the secondary stores.  
**\*2.** If the update process is set to 'Automatic', the dealer will not need to use the 'Integration' drop down found on the Ascend POS tool bar.  
**\*\*All times are Eastern Time U.S.**

## Monitor Stock Export for eCommerce

The **eCommerce Export File History** screen provides a way to monitor both automatic and manual exports to your eCommerce website provider.

1. From the **Ascend Desktop**, select the **Integration** menu > **eCommerce Export** > **Upload Files / View History**.
2. The **eCommerce Export File Upload History** screen is displayed.

**Note:** Information on the last seven stock exports to your eCommerce website are displayed.

The following information can be obtained from this screen:

- **Store Name:** Store that initiated the stock export.

**Multi-Store Dealers:** If the stock export was sent automatically, the name of the primary store in the multi-store chain is displayed. If a manual stock export is performed, the store that initiated the manual export is displayed.

- **Processing Method:**
  - **Automatic:** The stock export was sent to your eCommerce website automatically.
  - **Manual:** The stock export was manually sent by an Ascend user. A manual stock export can be requested at any time.
- **Request Status:** Displays the success or failure of the stock export. Also displays statuses related to gathering the required data for export.
- **Processing Start Time:** Displays the time at which the stock export began.
- **Processing End Time:** Displays the time at which the stock export was complete.

# Sales Import for eCommerce

## In this Chapter:

Download eCommerce Sales to Ascend, see page 7.

Manually Identify the eCommerce Customer(s), see page 9.

Manually Identify the eCommerce Product(s), see page 9.

Fulfill the eCommerce Sale, see page 9.

Sales Import for eCommerce, see page 7.

Refund Payment for the eCommerce Sale, see page 13.

## Summary:

Importing your eCommerce sales into Ascend provides the following benefits:

- Monitor your online stock and sales from Ascend.
- Eliminate the need to manually enter eCommerce transactions into Ascend.
- Be alerted when new eCommerce sales are available for download.
- Ensure that online sales are fulfilled promptly.
- Optimize business efficiency.

**IMPORTANT:** Specific configuration for this feature is required, see Appendix B - Sales Import Configuration on page 15.

## 5 Parts to Processing eCommerce Sales

1. Download eCommerce Sales to Ascend (see page 7).
2. If Ascend cannot automatically recognize the eCommerce customer, Manually Identify the eCommerce Customer(s) (see page 9).
3. If Ascend cannot automatically recognize the eCommerce product(s), Manually Identify the eCommerce Product(s) (see page 9).
4. Fulfill the eCommerce Sale (see page 9).
5. Sales Import for eCommerce (see page 7).

## Download eCommerce Sales to Ascend

**IMPORTANT: Ascend checks for new eCommerce sales every 15 minutes.** When a new eCommerce sale is detected, the following alert is displayed in the Ascend Desktop's **Alerts and Reminders** pane: **eCommerce Sales are available to download**. This alert is automatically removed when all eCommerce sales are downloaded to Ascend, and no sales remain in **New** status.

To enable the **Alerts and Reminders** pane: From the **Ascend Desktop**, select the **View** menu > **Reminders**.

When new eCommerce sales are available, download them to Ascend:

1. From the Ascend **Desktop**, select the **View** menu > **eCommerce Sales**. The **Loading eCommerce Sales** dialog box is displayed.

**Note:** eCommerce sales can also be accessed by:

1. From the **Alerts and Reminders** pane, double-click the **eCommerce sales are available to download** reminder.
2. When the download progress is complete, the eCommerce Sales screen is displayed. Determine the following:

→ Was the eCommerce customer recognized by Ascend?

- If any of the sales display a status of **Customer ID Needed**, the customer must be manually identified before the eCommerce sale can be downloaded to Ascend; see Manually Identify the eCommerce Customer(s) on page 9.
- If Ascend automatically recognized the eCommerce customer, the sale is immediately downloaded to Ascend and sale items are removed from stock.

**Note:** Ascend automatically recognizes the eCommerce customer when:

- The eCommerce customer's website account is recognized by Ascend due to previous use.
- The eCommerce customer's email address matches an Ascend customer's email address.

Ascend customer information is not overwritten by the information entered on your eCommerce website.

→ Were the eCommerce sale items recognized by Ascend?

- If any of the sales display **Product Match Failed** in the Status field, the product information must be corrected before the sale can be added to Ascend; see Manually Identify the eCommerce Product(s) on page 9.
- If Ascend automatically recognized the eCommerce sale item(s), the sale is immediately downloaded to Ascend and sale items are removed from stock.

**Note:** An eCommerce item is recognized when the item meets at least one of the following criteria:

- The eCommerce item's **GTIN** matches the Ascend product's **UPC** field.
- The eCommerce item's **SKU** matches the Ascend product's **In-Store SKU** field.
- The eCommerce item's **MPN** matches Ascend product's **Manufacturer Part Number** field

If an eCommerce item matches multiple Ascend products, the item cannot be automatically recognized by Ascend.

The eCommerce Sales screen displays the following information for all downloaded eCommerce transactions:

- **eCommerce Order ID:** The Order Number for the transaction on your eCommerce website. This number is also printed on the customer's Ascend sales receipt.
- **Ascend Barcode:** The Barcode number for the transaction in Ascend.

**Note:** Ascend Barcode is not displayed until the eCommerce customer and all eCommerce sales items are identified by Ascend.

- **Ascend PO Number:** If the purchase order is automatically generated by Trek, the Trek PO Number is displayed.
- **Status:** The status of the transaction.

**Note:** The **Status** field in Ascend does not update the customer's order status on your eCommerce website. Customer order status must be manually updated on your eCommerce website.

- **Customer:** The customer's name as entered in the website order.
- **Phone:** The customer's phone number as entered in the website order.
- **Email Address:** The customer's email address as entered in the website order.
- **Order Date:** The date the order was placed on the website.
- **Shipping Type:** The method used to deliver products to the customer, e.g. In-Store Pickup, UPS Ground, FedEx 2-Day Air.

**Note:** In the **Transaction** screen, the Shipping Type is displayed in the **Comments** field.

- **Shipping Address:** The address to which sales items will be shipped.



**Note:** The eCommerce Sales screen view can be modified to allow for easier use; for details, see Appendix C - Customize the Grid Columns on page 16. When the eCommerce Sale screen is closed, screen customizations are not saved.

## Manually Identify the eCommerce Customer(s)

If Ascend cannot automatically recognize eCommerce customers, **Customer ID Needed** is displayed in the Status field. If eCommerce customers must be manually identified:

1. From the toolbar (top of screen), click **[Identify Customers]**. The **Identify eCommerce Customer** dialog box is displayed.
2. In the **Customer Search** section, search results that match the customer's Last Name are automatically displayed.
  - ➔ If the correct Ascend customer is displayed in the search results:
    1. Select the customer name.
    2. Click **[Select Customer]**.

**Note:** Ascend customer information is not overwritten by customer information from your eCommerce website.

➔ If the correct Ascend customer is not found: Click **[Create New]** to add the new customer to Ascend.

**Note:** If the customer is not found, it may be helpful to search by another search parameter, e.g. Phone Number, First Name, Address, etc.

## Manually Identify the eCommerce Product(s)

If Ascend cannot automatically recognize the eCommerce product(s), **Product Match Failed** is displayed in the Status field.

**Note:** When multiple eCommerce sales exist for the same order, e.g. if a supplier and the shop are each fulfilling items, the following is displayed:

- The sale(s) which contains the product(s) in question displays **Product Match Failed** in the Status field.
- All other sales associated with the order display **Process Sale Failed** in the Status field.

To manually identify the eCommerce product(s):

1. On your eCommerce website, locate the customer sale. Note the product information for all listed eCommerce sale items.
2. In Ascend, locate the product information for each eCommerce sale item and compare to the product information listed on your eCommerce website:
  - ➔ If the product is in Ascend, correct any product information discrepancies. Also verify that no Ascend product information is missing, e.g. missing UPC or Manufacturer Part Number.
  - ➔ If the product is not in Ascend, add the product to Ascend.

**Note:** If the product is not found, it may be helpful to search by another search parameter, e.g. Description, Manufacturer Part Number, etc.

## Fulfill the eCommerce Sale

Fulfilling an eCommerce sale is a two-part process:

1. Review the table below to determine which fulfillment method applies to the eCommerce sale.
2. Process sale item(s). For instructions, refer to the **Next Action** column in the table below.

Fulfillment Types	Ascend eCommerce Screen			Next Action
	Ascend PO #	Shipping Type	Status	
Dealer Fulfilled: Ship to Customer	[blank]	[specified shipping method]	New	Immediately verify payment and pick items from stock and ship. For full details, see <a href="#">page 10</a> .
Dealer Fulfilled: In Store Pickup	[blank]	In-Store Pickup	New	Immediately verify payment and pick items from stock and prepare for pickup. For full details, see <a href="#">page 11</a> .

**IMPORTANT:** Keeping the following in mind when fulfilling eCommerce sales:

- Do not modify the price of eCommerce sales items without contacting the customer. If the sale price is modified in Ascend, the customer's payment must be updated on the eCommerce website.
- If an issue exists with fulfilling the customer's sale, call the customer or utilize the **[Email]** button on the toolbar.

### Dealer Fulfilled: Ship to Customer

This type of eCommerce sale is identified by:

- Ascend PO Number field is blank.
- Shipping method is automatically assigned.

**Multi-Store Dealers:** If there are insufficient quantities of an item at the designated shipping location, the item must be transferred from another location.

Process item(s) with **Dealer - Ship to Customer** fulfillment as follows:

1. Verify payment on the eCommerce website and in Ascend, see Verify Payment through eCommerce Website on page 12.

**IMPORTANT:** In order to verify payment, an employee must have access to your eCommerce provider's payment processing features.

2. Print sales receipt and update eCommerce sale status:
  1. From the toolbar, click **[Print Sales Receipt] > Full Page Receipt**.
  2. Update the Status field to **In Process**.
  3. Click **[Save]** (located at the bottom of the screen).
2. Pick items and update eCommerce sale status:
  1. Reference the printed sales receipt as you pick items.
  2. Place picked items in your layaway area for shipping later or box items for immediate shipment. Include the printed full page receipt.

**Note:** The eCommerce Order ID is printed on the sales receipt.

3. Update the Status field to **Ready for Shipping**.
4. Click **[Save]** (located at the bottom of the screen).

**Note:** If there are **insufficient quantities** of an item(s), do one of the following:

- Special order the item(s):
  1. Update the Status field to **On Hold**.
  2. Contact the customer about the special order.
  3. If the customer approves, special order the item(s).
  4. Update the Status field to **Special Order**.
- If the item(s) cannot be special ordered, refund the item(s):
  1. Contact the customer about unavailable items.
  2. Add a note in the sale stating why the item(s) were refunded.
  3. Refund the customer's payment, see Refund Payment for the eCommerce Sale on page 13.
  4. Update the Status field to **Completed**.

**IMPORTANT:** Government regulations may prohibit processing payment before items are shipped. Ship items the same day payment is processed in order to avoid accounting issues.

3. At the time items are physically removed from the store for shipment:
  1. Update the Status field to **Ready to Collect Payment**.
  2. Click **[Save]** (located at the bottom of the screen).

**Best Practice:** Record the tracking number from your shipping company in the sale:

1. From the **eCommerce Sales** screen, select the required transaction.
2. Click **[Modify]**. The **Transaction** screen is displayed.
3. In the **Comments** field, enter the shipping company's name and tracking number, e.g. UPS#1Z9999999999999999.
4. From the toolbar, click **[Save]** (keyboard F8).

4. Update eCommerce sale status:
  1. Update the Status field to **Completed**.
  2. Click **[Save]** (located at the bottom of the screen).

### Dealer Fulfilled: In Store Pickup

This type of eCommerce sale is identified by:

- Ascend PO Number field is blank.
- Shipping Type of In-Store Pickup is automatically assigned.

**Multi-Store Dealers:** If there are insufficient quantities of an item at the designated pickup location, the item must be transferred from another location.

Process item(s) with **Dealer - In-Store Pickup** fulfillment as follows:

1. Verify payment on the eCommerce website and in Ascend, see Verify Payment through eCommerce Website on page 12.

**IMPORTANT:** In order to verify payment, an employee must have access to your eCommerce provider's payment processing features.

2. Print sales receipt and update eCommerce sale status:
  1. From the toolbar, click **[Print Sales Receipt] > Print Epson**.
  2. Update the status field to **In Process**.
  3. Click **[Save]** (located at the bottom of the screen).
2. Pick items from the sales floor and update eCommerce sale status:

1. Reference the printed sales receipt as you pick items.
2. Place picked items in your layaway area. Attach the printed sales receipt.

**Note:** The ECommerce Order ID is printed on the sales receipt.

3. Update the Status field to **Ready to Collect Payment**.
4. Click **[Save]** (located at the bottom of the screen).

**Note:** If there are **insufficient quantities** of an item(s), do one of the following:

- Special order the item(s):
  1. Update the Status field to **On Hold**.
  2. Contact the customer about the special order.
  3. If the customer approves, special order the item(s).
  4. Update the Status field to **Special Order**.
- If the item(s) cannot be special ordered, refund the item(s):
  1. Contact the customer about unavailable items.
  2. Add a note in the sale stating why the item(s) were refunded.
  3. Refund the customer's payment, see Refund Payment for the eCommerce Sale on page 13.
  4. Update the Status field to **Completed**.

3. Update eCommerce sale status:
  1. Update the Status field to **Ready for Pickup**.
  2. Click **[Save]** (located at the bottom of the screen).
4. At the time of customer pick-up:
  1. Complete the sale.
    1. Select the required transaction.
    2. Click **[Modify]**. The **Transaction** screen is displayed.
    3. In the **Balance** field, verify **£0.00** is displayed.
    4. Click **[Save]** (keyboard F8). The **Paid in Full Transaction** prompt is displayed.
    5. Click **[Finish as a Sale]**. The **No Change Due** dialog box is displayed.
    6. Click **[OK]**.
  2. Update the Status field to **Completed**.
  3. Click **[Save]** (located at the bottom of the screen).

## **Verify Payment through eCommerce Website**

1. Verify the payment via your eCommerce website provider.
2. Record the payment in Ascend
  1. From the **Ascend Desktop**, select the **View** menu > **eCommerce Sales**.
  2. Select the required transaction.
  3. Click **[Modify]**. The **Transaction** screen is displayed.
  4. On the **Payments** toolbar, click any payment button, e.g. **[Cash]** (keyboard F4). The **Payment** dialog box is displayed.
  5. From the **Payment Type** drop-down menu, select the required payment type:
    - **PayPal**: Payment was made via PayPal account.
    - **eCommerce**: Payment was made via credit card gateway. From the **Card Type** drop-down menu, select the required card type, e.g. VISA, MasterCard.
  6. In the **Amount** field, enter the payment amount.
  7. (optional) In the **Comments** field, enter additional notes.
  8. Click **[Save]**. The **Transaction** screen is redisplayed.
  9. From the toolbar, click **[Save]**.
  10. When the transaction balance is £0.00, the **Paid in Full Transaction** prompt is displayed:
    - **[Keep Open]**: Transaction must remain as a layaway, e.g. the customer has not picked up the sale item(s).
    - **[Finish as a Sale]**: The transaction is complete, e.g. the sale item(s) was shipped to the customer.

## Refund Payment for the eCommerce Sale

When a return for an eCommerce sale is completed, the payment must be refunded to the customer.

**IMPORTANT:** In order to process refunds, an employee must have access to your eCommerce provider's payment processing features.

### Refund Payment in the Store

1. Record the refund via your eCommerce website provider.
2. Record the refund in Ascend.
  1. From the **Ascend Desktop**, create a return for the sale. The **Transaction** screen is displayed.
  2. Tender the required payment. The **Payment** dialog box is displayed.
  3. In the **Amount** field, verify the refund amount is displayed.

**Note:** Because money is being issued to the customer, the amount is displayed as a negative number.

4. Click **[Save]**. The **No Change Due** dialog box is displayed.

**Note:** If the **Transaction** screen is redisplayed: From the toolbar, click **[Save]**.

5. Click **[OK]**.

## Appendix A - Stock Export Configuration

The following configuration must be completed before using Stock Export for eCommerce:

- **Website Services:** Contact your eCommerce website provider for details on configuring your eCommerce website for integration with Ascend.
- **Enable ADT:** Enable the Data Transporting option in Ascend.
  1. From the **Ascend Desktop**, double-click **[Options]**. The **Settings and Options** dialog box is displayed.
  2. Select the **General** topic.
  3. Enable the **Allow Data Transporting** option.
  4. Click **[OK]**.
- **eCommerce Export Options:** Enter your eCommerce website account information.

**Multi-Store Dealers:** Ascend's stock export options must be configured at all locations, even if all locations do not upload to an eCommerce website.

1. From the **Ascend Desktop**, double-click **[Options]**. The **Settings and Options** dialog box is displayed.
2. Select the **eCommerce Export** topic.
3. Enter the following information:
  - **Stock Export FTP Address:** Obtain from your eCommerce website provider.
  - **Stock Export User:** Obtain from your eCommerce website provider.
  - **Stock Export Password:** Obtain from your eCommerce website provider.
  - **Stock Export Short Name:** Defaults to the **Short Name** from **Database Explorer > Locations**. If you are a multi-store location, enter a name that will be easily recognizable by customers, e.g. city or street name. The Short Name is used to identify your store location on your eCommerce website. The Short Name must be 25 characters or less.

**Multi-Store Dealers:** To avoid confusion, enter the same location name specified on your eCommerce website.

- (Multi-Store Dealers) **Data Upload Options:**
    - **None:** Select this option if this location does not upload to an eCommerce website. Data from this location is not included in any manual OR automatic uploads.
    - **Single-Site:** Select this option if this location is part of multi-store chain, but uploads to its own, individual eCommerce website.
    - **Multi-Site:** Select this option if this location is part of multi-store chain and all stores in the chain upload data to a single eCommerce website.
4. Click **[OK]**.

## Appendix B - Sales Import Configuration

Configuration on both Ascend and your eCommerce website is required before using the eCommerce Sales feature.

**IMPORTANT:** All previously completed orders must be resolved on your eCommerce website before using the eCommerce Sales features in Ascend.

### Website Configuration

Contact your eCommerce website provider to verify your website is configured correctly.

### Ascend Configuration

- **User Permissions:** The **eCommerce Import** user permission is required, see Assign Permissions
  - **Location Email Address:** In order to email customers from the eCommerce Sales screen, an email address must be entered for your location.
    1. From the **Ascend Desktop**, select the **View** menu > **Locations**. A list of locations is displayed in the right pane.
    2. Select the required location.
    3. Click **[Modify]**. The **Modify Location** dialog box is displayed.
    4. In the **eMail** field, enter the email address for your store.
    5. Click **[Save]**.
  - **Enable ADT:** Enable the Data Transporting option in Ascend.
    1. From the **Ascend Desktop**, double-click **[Options]**. The **Settings and Options** dialog box is displayed.
    2. Select the **General** topic.
    3. Enable the **Allow Data Transporting** option.
    4. Click **[OK]**.
  - **eCommerce Import Options:** Enter your eCommerce website order export information.
    1. From the **Ascend Desktop**, double-click **[Options]**. The **Settings and Options** dialog box is displayed.
    2. Select the **eCommerce Import** topic.
    3. Enable the **Turn On eCommerce Sales Import** option.
    4. In the **eCommerce Sales Management** section, enter the following information:
      - **Download Order URL:** Obtain from your eCommerce website provider.
      - **Confirm Receipt URL:** Obtain from your eCommerce website provider.
      - **Change Status URL:** Leave this field blank.
    5. **(Multi-Store Dealers) Multi-Store eCommerce Sales Management:**
      - **Multi-Store Location Name:** Enter a name that will be easily recognizable by customers, e.g. city or street name. The **Multi-Store Location Name** is used to identify your store location on your eCommerce website.
- IMPORTANT:** The **Multi-Store Location Name** must exactly match the location name specified on your eCommerce website.
- **This is the Primary eCommerce Location:** Enable this option if your location is responsible for shipping eCommerce sales to customers. eCommerce sales which require shipping are download to this location only.
- IMPORTANT:** Only enable the **Primary eCommerce Location** option at one location.
6. Click **[OK]**.
- **PayPal Payment Type:** If you are accepting PayPal payments for eCommerce Sales, you must create a payment type for PayPal payments.
  1. From the **Ascend Desktop**, select the **View** menu > **Payment Types**. All payment types in your system is displayed.
  2. Click **[Add]**. The **Add Payment Type** dialog box is displayed.
  3. In the **Name** field, enter **PayPal**.
  4. (optional) To restrict users from accessing the payment type, enable the **Advanced** option.
  5. Click **[Save]**.

## Appendix C - Customize the Grid Columns

### In this Chapter:

Sort by Column, see page 16.

Move Column, see page 16.

Group by Column, see page 17.

Resize Columns, see page 17.

Appendix C - Customize the Grid Columns, see page 16.

Apply an Advanced Filter, see page 18.

**Note:** Multiple customization options can be applied. The availability of customization options varies by screen.

### Sort by Column

Column information can be sorted in ascending or descending order.

#### Sort by a column.

1. Right-click the required column heading.
2. From the displayed menu, select the required sort order:
  - **Sort Ascending**
    - **Numbers:** The lowest value is displayed at the top of the list, e.g. 1-10.
    - **Letters:** Text is displayed in alphabetical order, e.g. A to Z.
  - **Sort Descending**
    - **Numbers:** The highest value is displayed at the top of the list, e.g. 10-1.
    - **Letters:** Text is displayed in reverse alphabetical order, e.g. Z to A.

#### Remove sort order.

1. Right-click the required sorted column header. From the displayed menu, select **Clear Sorting**.

**Note:** Sorted columns are identified by a small triangle icon:

- Upward Arrow Icon=ascending
- Downward Arrow Icon=descending

### Move Column

Columns can be reordered and removed from view.

#### Reorder columns.

1. **Click+Drag** the required column header to a new location.

#### Remove a column.

1. Right-click the required column header.
2. From the displayed menu, select **Remove This Column**.

**Note:** Columns can also be removed by: **Click+Dragging** the required column header to the toolbar.

#### Restore a removed column.

1. Right-click any column header.
2. From the displayed menu, select **Column Chooser**. The **Customization** dialog box is displayed.
3. From the **Customization** dialog box, double-click the required column header. The column is returned to its default position.



**Note:** To restore a column to a specific position: From the **Column Chooser**, **Click+Drag** the required column header to the required location.

## Group by Column

Group related column information in a separate list, e.g. eCommerce orders with a specific status.

### Group by a column.

1. Right-click the required column header.
2. From the displayed menu, select **Group By This Column**.
3. Click the triangle icon to view the grouped items.

**Note:** Columns can also be grouped by:

1. **Click+Drag** the required column header to the **Grouping Target** (located below the toolbar).
2. Click the triangle icon to view the grouped items.

### Expand all groups.

1. Right-click anywhere in the **Grouping Target** (located below the toolbar).
2. From the displayed menu, select **Full Expand**. The individual items included in each group are displayed.

### Collapse all groups.

1. Right-click anywhere in the **Grouping Target** (below the toolbar).
2. From the displayed menu, select **Full Collapse**. The individual items included in each are hidden.

### Remove all groups.

1. Right-click a blank area in the **Grouping Target** (below the toolbar).
2. From the displayed menu, select **Clear Grouping**.

### Remove a specific group.

1. In the **Grouping Target** (below the toolbar), right-click the required column header.
2. From the displayed menu, select **UnGroup**.

## Resize Columns

Resize columns to view column information not currently in view.

### Resize all columns to longest field length.

1. Right-click any column header.
2. From the displayed menu, select **Best Fit (all columns)**.

### Resize a single column to longest field length.

1. Right-click the required column header.
2. From the displayed menu, select **Best Fit**.

### Resize a single column to a specific size.

1. Move the cursor to the end of the required column header. A double-ended arrow is displayed.
2. **Click+Drag** to the required column size.

## Apply a Filter

Apply a filter to display information which meets specified criteria, e.g. Work Orders with a specific status.

### Filter by a single column.

1. From the required column header, click the **[Filter Icon]**.
2. From the displayed menu, select the required filter.

**Note:** Previously selected filters are displayed at the top of the list.

#### Filter across multiple columns.

1. Right-click any column header.
2. From the displayed menu, select **Show Auto Filter Row**. A blank row is displayed below the column headers.
3. Enter the required search parameters.

#### Remove a filter.

1. Right-click the required filtered column header.
2. From the displayed menu, select **Clear Filter**.

**Note:** After a filter is applied, it can also be removed. At the bottom of the displayed search results, click the **[x]** next to the required filter.

### Apply an Advanced Filter

An advanced filter allows you to apply multiple conditions, e.g. Work Orders which have a specific Status but do not have a balance due.

#### Build an advanced filter.

1. Open the Filter Editor.
  1. Right-click any column header.
  2. From the displayed menu, select **Filter Editor**. The **Filter Editor** dialog box is displayed.

**Note:** When a filter is already applied, the Filter Editor can also be opened by: At the bottom of the displayed search results, click **[Edit Filter]**.

2. Decide if information will be excluded or included from specified conditions.

**Note:** Conditions will be specified in the next step.

1. Click the top-level qualifier, e.g. And. From the displayed menu, select one of the following options:
  - **And:** Items which meet all conditions will be returned.
  - **Or:** Items which meet any condition will be returned.
  - **Not And:** Items which do not meet all conditions will be returned.
  - **Not Or:** Items which do not meet any condition will be returned.
3. Add conditions.
  1. Click the required qualifier. From the displayed menu, select **Add Condition**.
  2. Select the required search parameters.

**Note:** To remove a condition: Click the **[x]** next to the condition.

4. (optional) If a set of criteria must be applied as a single condition, add a condition group.
  1. Click the qualifier which requires the condition group. From the displayed menu, select **Add Group**.
  2. Select the required qualifier, e.g. And, Or, etc.
  3. Add the required conditions.

**Note:** To remove a condition group:

1. Click the required qualifier.
2. From the displayed menu, select **Remove Group**.

5. When all conditions are configured, click **[OK]**.

**Note:** To preview results without exiting the Filter Editor, click **[Apply]**.

#### **Reset the filter.**

1. From the **Filter Editor**, click the top-level qualifier.
2. From the displayed menu, select **Clear All**.

#### **Select a previously applied filter.**

1. At the bottom of the displayed search results, locate the required filter.
2. Click the drop-down arrow next to the current filter parameters. The previous filters applied are displayed.
3. Select the required filter.

#### **Remove the filter.**

1. At the bottom of the displayed search results, locate the required filter.
2. Click the **[x]** next to the filter.