Introduction to RDP Navigation

This article will cover basic UI navigation of the EVP RDP Application.

See the following articles to get access to EVP's RDP Application:

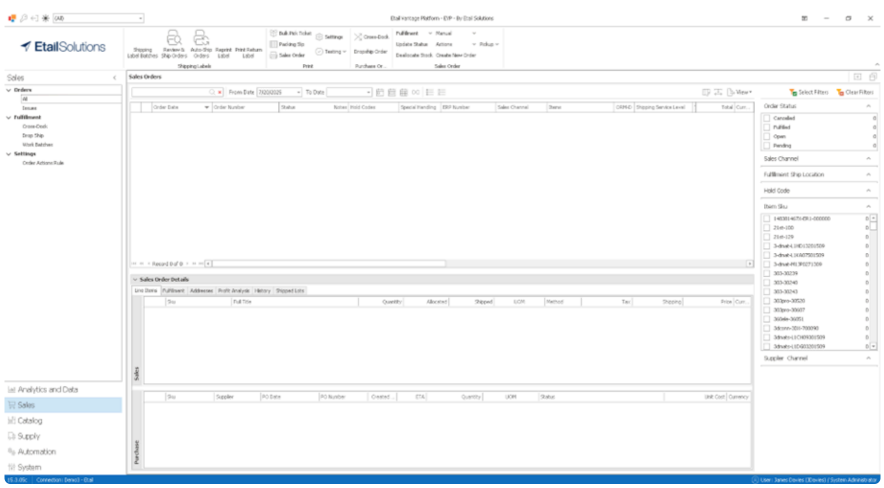
[Downloading EVP RDP Files]

[Launching EVP from Windows]

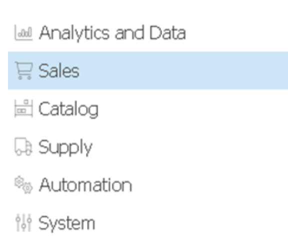
When logging into Etail's RDP to access EVP, the landing page will be the Sales Order screen on the Sales Module. The first navigational layer of EVP is Modules. Modules represent areas of the system related to specific functions. Selecting a Module will change the rest of the RDP window to display that module.

NOTE: Modules visible may vary based on User Permissions

NOTE: The EVP Version is always displayed in the bottom right corner; The User logged in is always in the bottom left corner.



EVP Sales Order Screen



EVP Modules

Summary of Modules

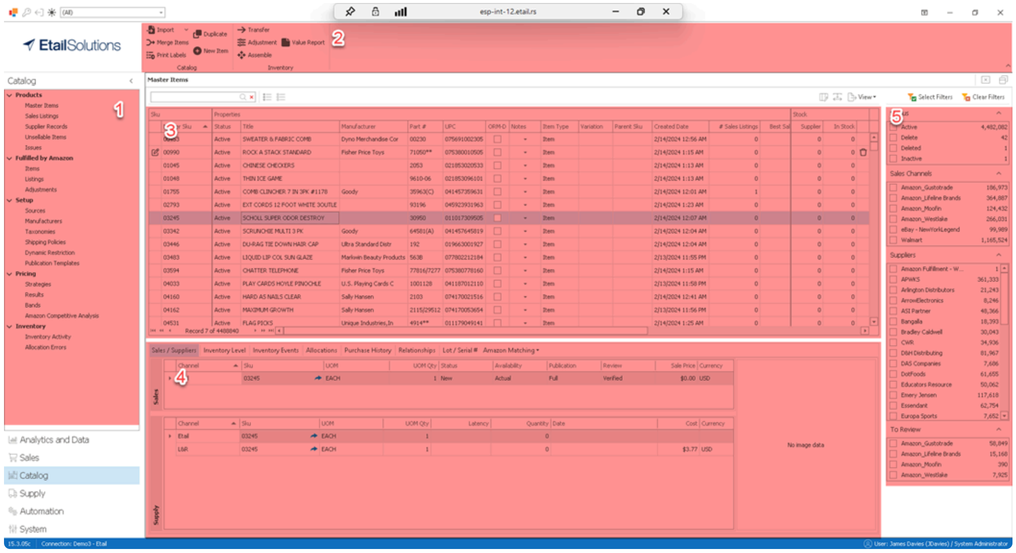
- Analytics and Data
  - The Analytics and Data Module will display Order Monitor, Dashboards, Data Sources, and Reports
  - The Order Monitor is a basic display of Sales Order Volume by Count or Revenue over time.
  - Dashboards display data from Data Sources; Dashboards enable the usage of charts, grids, and graphs to display data.
  - Data Sources are SQL statements that display a grid of data.
  - Reports store the structure of labels used in various processes (Pick Sheet, Packing Slip, Shipping Label, etc.)
- Sales
  - The Sales Module will display the Sales Orders imported from Sales Channels.
    - The primary function of the Sales Module is to monitor and manage Sales Order Activity.
  - This Module is where Order Action Rules are configured.
    - Order Action Rules are logic statements that can apply automated action if the order meets the condition of the statement. See more information here: Order Action Rule Basics
- Catalog
  - The Catalog Module will display your EVP catalog, Catalog Management Tools, and Pricing rules and results.
- Supply
  - The Supply Module will display Purchase Orders and Fulfillment Orders
- Automation
  - The Automation Module displays Tasks that have been enabled for manual usage.
- System
  - The System Module provides access to system configuration options, Tasks, and User Permissions management.

EVP General Layout and Navigation

Each Module will provide access to different screens; however, many of the main screens will share a similar layout.

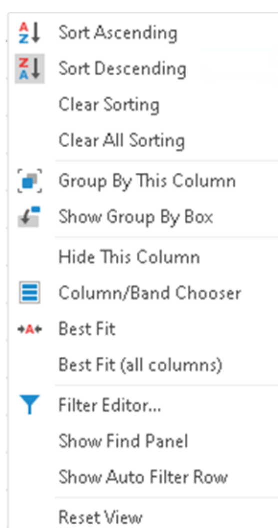
1. The left side of the window will display the selected modules Menu Tree.
2. The top side of the screen will have executable functions
3. The top half of the center grid will show everything. For example, on the Catalog Module, you will see all SKUs, and on the Sales Order screen, you will see all Sales Orders

4. The bottom half of the center grid will show additional details about the object selected in the topic grid.
5. The right side of the screen has the filter option to refine what is visible in the top half of the center grid.



The Center Grid of a module will have the following option to optimize the data being displayed:

- The Headers can be clicked and dragged for repositioning.
- The Header row can be right-clicked on to show the following menu:
    - Column/Band Chooser will allow you to add additional columns not currently on the grid
    - Best Fit (all columns) will resize the column based on the length of the data to make viewing easier.
    - Show Auto Filter Row allows you to search strings within a column.



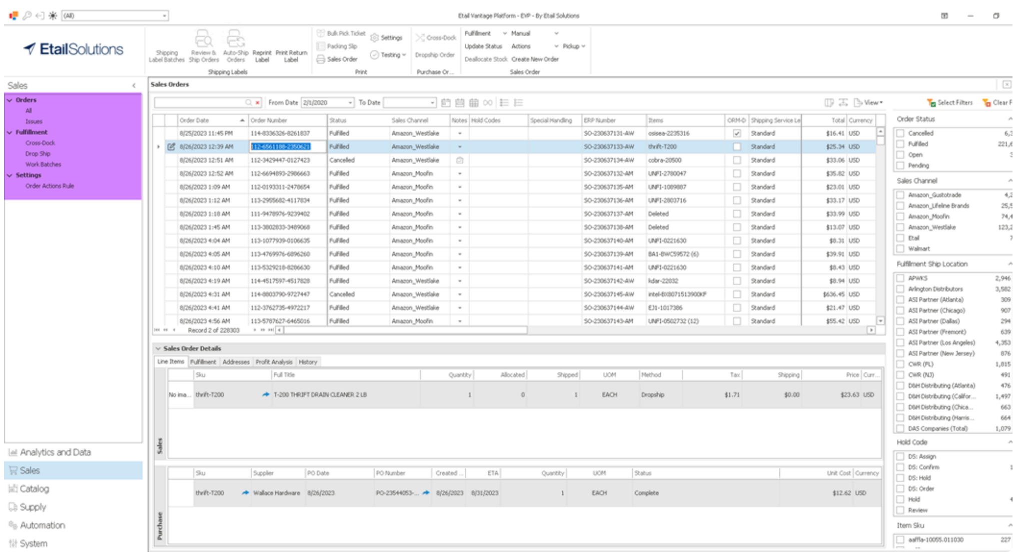
- The top right of a Grid has a "View" button.

- The Save As option allows you to save a view. For example, you can add columns, position columns, and add filters, then save this view so it doesn't need to be recreated later.
- Export allows you to export the data shown on the grid into a CSV file.

Sales Order Module Basic Navigation

The Sales Order Module's primary function is to display Sales Order activity and allow an EVP user to manage Sales Orders.

On the Left side of the screen is the Module Menu Tree of the Sales Order Module.

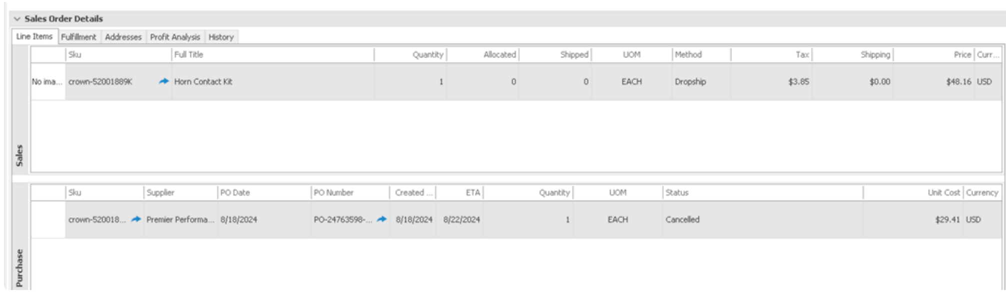


In the Center of the Order’s section of the Sales Module is the Sales Order Grid. The top half of the will list all Sales Orders; The bottom half will show details about the Sales Order selected on the top grid. The Search option can be used to look for a specific data point in the top grid. Also, remember that columns can be added, removed, and reorganized.

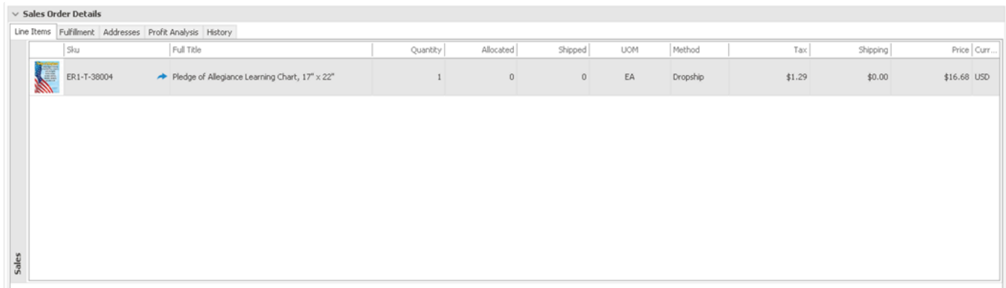
NOTE: Two essential columns on the Sales Order grid to understand are “Status” and “Hold Code”; These columns indicate the state of the order in its Fulfillment Life cycle. See More info about these in the articles on the EVP Usage Documentation Page: EVP Sales Order Hold Code and Channel Status Values; Sales Order Hold Codes Defined

As mentioned above, when a Sales Order is selected, the bottom half of the screen displays additional order details. A Key part of these extra details is that it will show if a Purchase Order or Fulfillment Order has already been created. The Fulfillment tab will show additional information about the DOM’s fulfillment decision. The Addresses tab will show address details. The Profit Analysis tab will show financial information. Lastly, History will show every event the order has had and also allow you to drill down into the DOM decision.

Example of an Order with a PO/FO

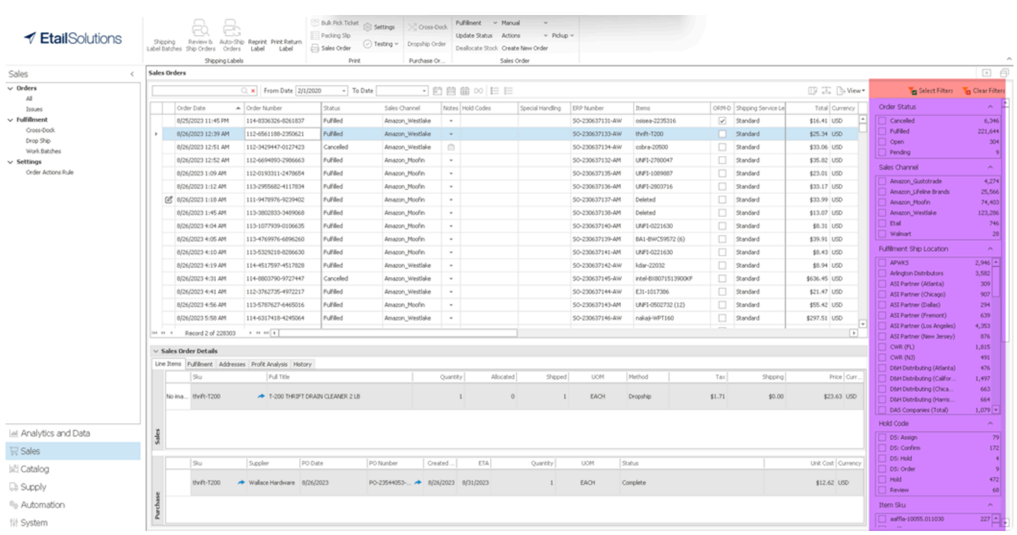


Example of an Order with no PO or FO



The Right side of the Sales Order screen is the various filter options. At the top of the filter column are two options: Select Filters and Clear Filters. Select Filters will allow you to choose and order which filters are displayed. Clearing filters will unflag any previously selected filters.

NOTE: You can add/remove/organize both filters and columns, then save these views by selecting the “View” dropdown and select “Save As”. You will be prompted to name the saved view and asked if the view should be specific to your login or available for all users of you EVP instance. The saved view will appear under the default view of that module; on the Sales Order Module, this would be “All”.



The top menu ribbon of the Sales Order screen has four sections: Shipping Labels, Print, Purchase Order, and Sales Order.

The Shipping Labels section will allow you to do the following:

- Rate Shop an individual Order or a selected group and generate a shipping label
- Reprint already generated labels.

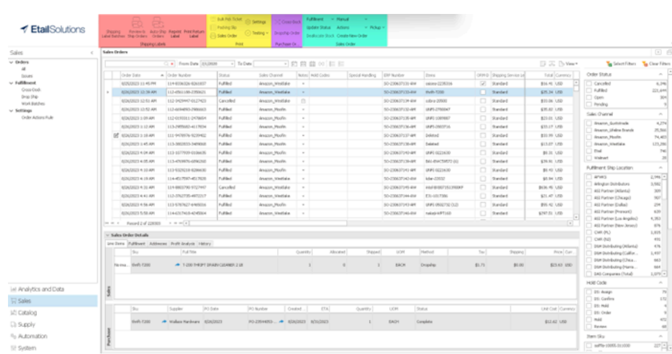
The Print section will allow you to do the following:

- Configure Printer Settings
- Print Pick Tickets, Packing Slips, and Sales Orders
- **NOTE:** Print settings are User Specific

The Purchase Order section is used for specific workflows and is not covered in detail here.

The Sales Order section will allow you to do the following:

- Manually create a Sales Order.
- Refresh the Status and Hold Code of Sales Orders.
- Manually route an Order
- Force a DOM for any fulfillment method or a specific fulfillment method.
- Release an Order from Hold
- Place an Order on Hold or Review
- Add Remove Order Tags
- Manually run Order Action Rules
- Manually Add or Push Tracking
- Manually Add Tracking or Void Shipments
- Delete / Re-Open or Duplicate an Order



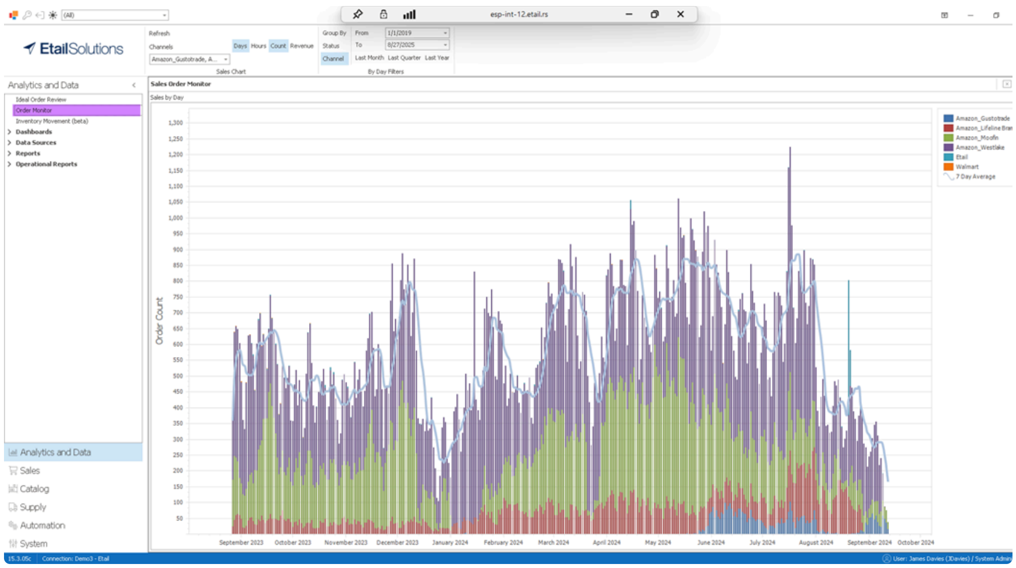
Analytics and Data Basic Navigation

The Analytics and Data Module is for displaying data and managing labels.

Four areas in this module should be understood: Order Monitor, Dashboards, Data Source, and Reports.

- The Order Monitor displays Sales Order Volume (by count or revenue) over time. It can be filtered to specific Channels and Data ranges.

- Dashboards serve as a means to display data (Data Source) in visual formats (e.g., Graphs, charts).
- Data Sources are SQL statements that return data in a table format from EVP databases.
- Reports function as a storage structure for labels (Pick Slip, Shipping Label, Packing Slip, etc.).

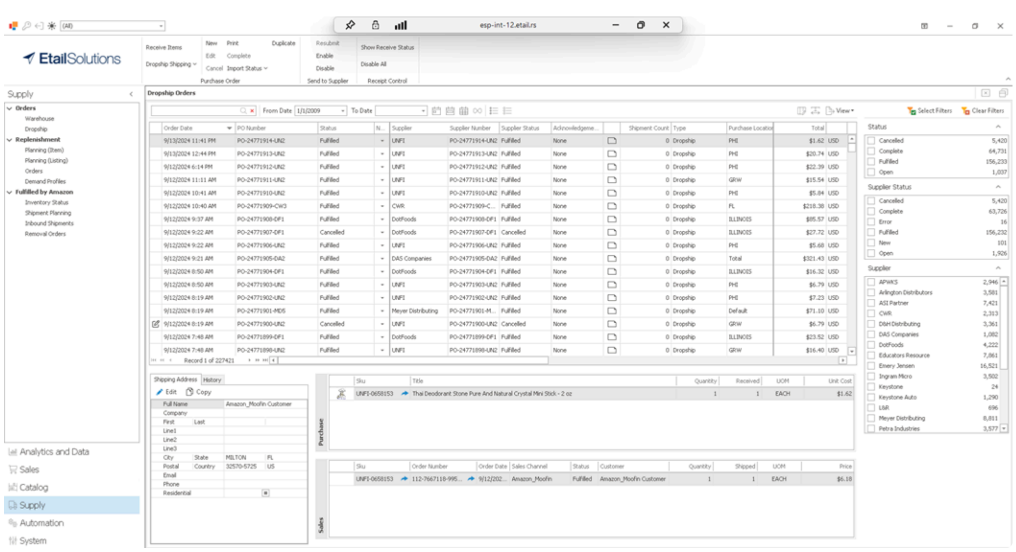


Supply Module Basic Navigation

The Supply Module is used to manage Purchase Orders (PO) and Fulfillment Orders (FO). A Purchase Order is a request to BUY a product from a supplier. Depending on the integration type, the supplier will either ship the order to the Customer (Dropship) or to you, and then you send it to the customer (Crossdock). A Fulfillment Order is a request to a 3PL to SHIP a product you already own.

The Warehouse screen will display FOs; the Dropship screen will display POs.

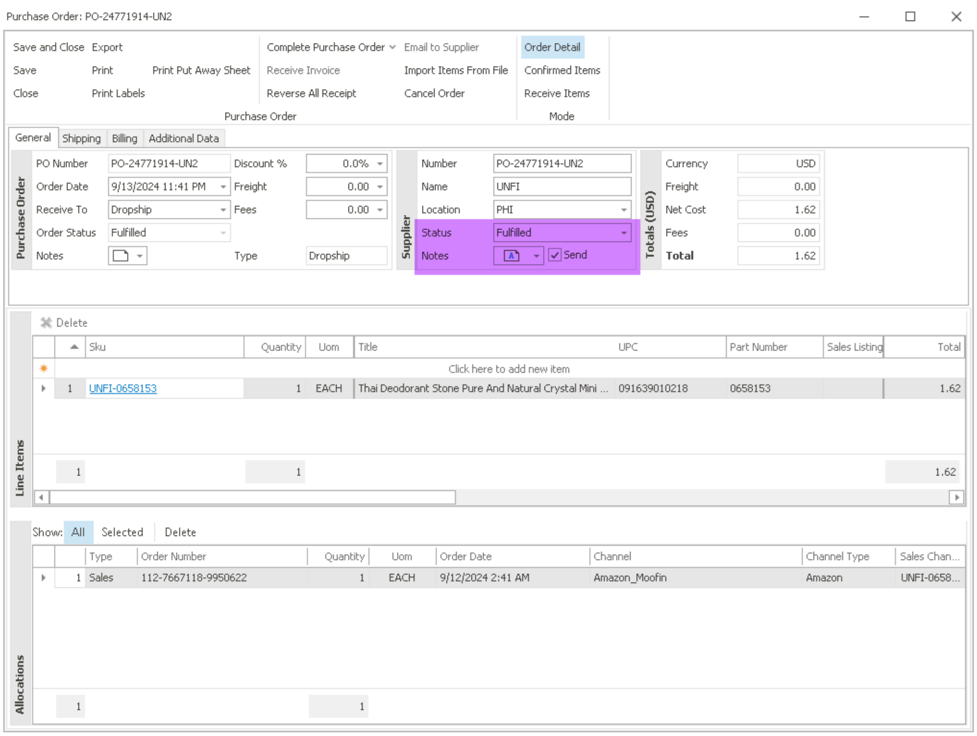
The Layout of the Supplier Module is very similar to that of the Sales Module. The Center Grid displays all Orders, with the bottom section showing additional details of the order selected. The filters are located on the right, and the top ribbon enables various actions.



When managing PO/FOs a critical setting to understand is the “Send” flag. Additionally, the Status and notes can provide helpful information.

Depending on how a supplier is configured, the Send flag may be automatically checked or left unchecked. If unchecked, a User must manually flag it. The Send flag must be checked for the system automation to send the order to the supplier/3PL.

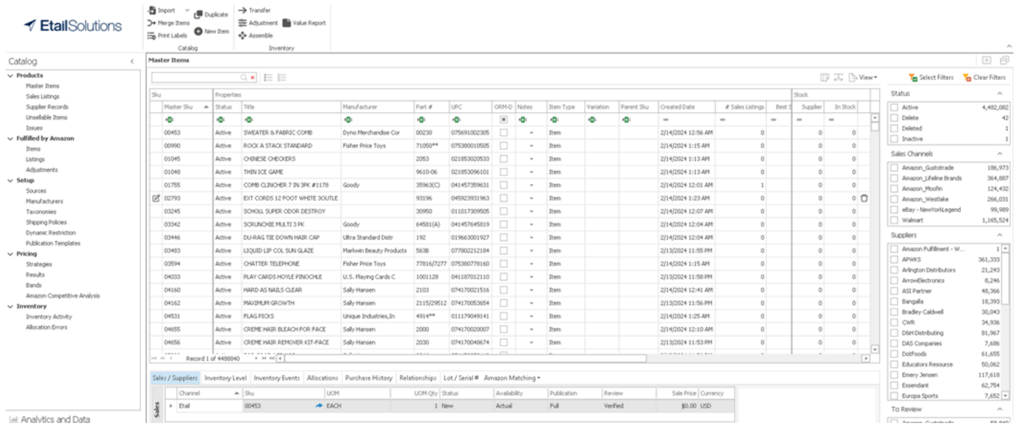
The Status indicates where the PO/FO is in its lifecycle. “New” indicates a PO/FO that has not yet been sent. “Open” means a PO/FO that has been sent, and EVP is waiting for tracking to be provided. “Fulfilled” indicates the order was sent, and tracking has been received. " Complete" indicates that the Order was manually finished. The “Error” status indicates that the Order failed to send for some reason. If the automation captures an error, it is recorded in the Notes field.



Catalog Module Basic Navigation

The Catalog Module is used to manage catalog data and publishing, as well as configuring Pricing, Dynamic Restrictions, Shipping Policies, and Publication Templates.

The layout pattern seen in the Sales Module and Supply Module is also present in this module. The top menu ribbon contains buttons for various actions. The left column displays the Menu Tree, while the right column features filters. The center top grid shows all SKUs, and the center bottom section includes details of the selected SKU.



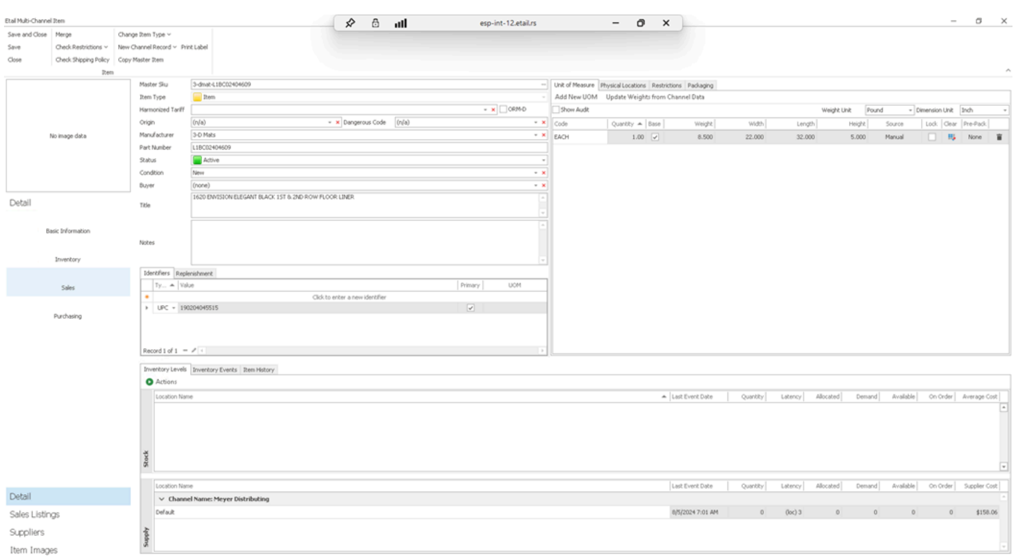
The Menu Tree of the Catalog Module contains many of the Catalog Management Tools EVP provides. These tools will not be covered in depth here; however, a summary and a link to additional materials are provided below. **NOTE:** Some screens are omitted below as they are for advanced or specific functions.

- **Products**
  - Master Items
    - Selecting this screen will have the center grid display your EVP Catalog at the MasterSKU Level
  - Sales Listings
    - Selecting this screen will have the center grid display all Sales Listing Channel Records in your EVP catalog.
  - Supplier Records
    - Selecting this screen will have the center grid display all Supplier Channel Records in your EVP catalog.
  - Unsellable Items
    - This screen allows you to review SKUs that are unable to publish to a Marketplace.
  - Issues
    - This screen displays Issue event logged by EVPs monitors and automation.
- **Setup**
  - Sources
    - This screen allows you to create and manage Catalog Source.
    - Catalog Sources are a flat file import tool.
    - See More Information: [Catalog Source - Introductory Material]
  - Manufacturers
    - This screen allows the configuration of MFR Name Variations

        - See More Information: [EVP Manufacture Data Management]
    - Taxonomies
        - This screen allows a user to see the various Taxonomies used on different channels.
    - Shipping Policies
        - This screen is used to create, configure, and manage Shipping Policies.
    - Dynamic Restrictions
        - This screen is used to create, configure, and manage Dynamic Restrictions.
    - Publication Templates
        - This screen is used to create, configure, and manage Publication Templates.
- **Pricing**
    - Strategies
        - This screen is used to create, configure, and manage EVP automated repricing.
    - Results
        - This screen is used to assess repricing activity.

SKU Navigation Basics

When reviewing an individual SKU, there are two levels to be aware of: Master SKU and Channel SKU. When an item is open, you will typically land on the Detail page. This page stores information about a SKU at the Master SKU level (e.g., the MFR, MPN, and UPC are the same regardless of which Channel). Underneath the Details page, there are three additional screens: Sales Listings, Suppliers, and Item Images.



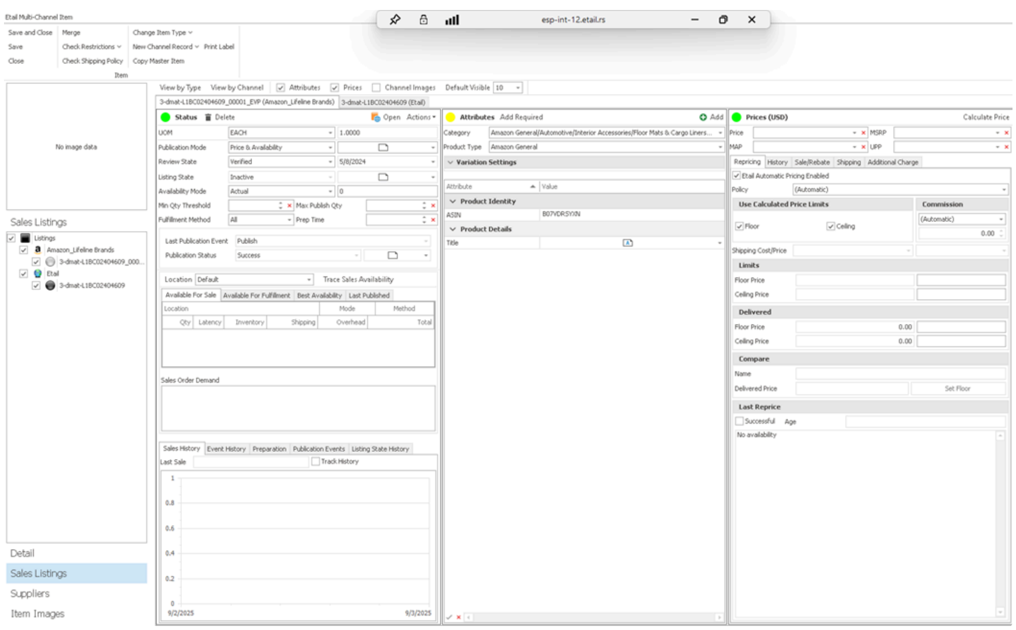
Item Images show all images associated with the SKU and provide the ability to load images manually.

Selecting the Sales Listing screen of a SKU will show all Sales Channel SKUs associated with the MasterSKU. When viewing an individual Sales Channel Record, the default view will have three columns: Status, Attributes, and Prices.

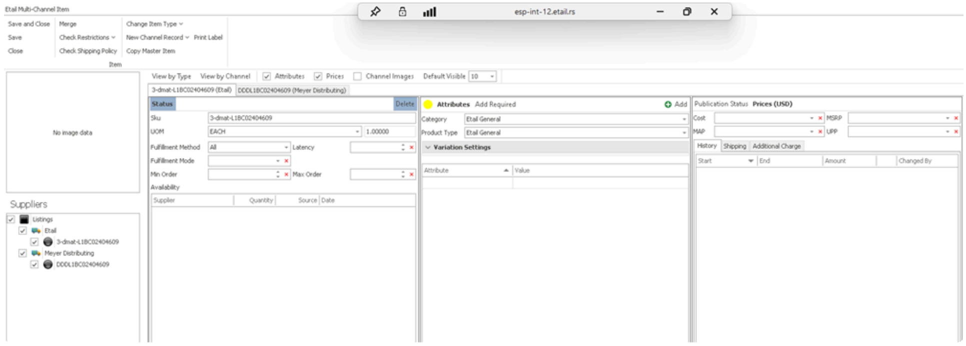
The Status section contains information related to the various modes in which a SKU can be configured, the UOM of the specific Channel Record, available inventory for publication, and a log of activity that has occurred on the SKU.

The Attributes section displays the Category and Product type a SKU is assigned to. Additionally, it will display the attribute data associated with the SKU.

The Price section will display the current price data, the price policy currently assigned, and a basic history of the price. This section will also display the Shipping Policy to which an item is assigned.



When selecting the Supplier screen of a SKU, there will be a similar layout to Sales listings. Key differences are the status options available, and instead of Prices, there are Costs.



This concludes a Basic Review of EVP UI Navigation.