Setup Your Account

To set up an account:

- **Step 1**: The sellers have to request an invite from **https://xtributor.com/US/**
- **Step 2**: The seller profile approval process is initiated.
- **Step 3**: On approval, you will be supplied with an URL and a user name. An Invite mail is sent which has a link to set up your login details.

  Step 4: Enter your preferred username and set up a strong password for your application. Enter a name for your CSP Marketplace to get started

  Note

  Recommended strong password for your application: Minimum of 8 characters including a combination of lowercase letters, one uppercase letter, one number, and one special character.

- **Step 5**: Click on **Get Started**. This will redirect to your portal. Now you are all set to explore your new CSP store.

Sign In To Your Account

- 1. Go to your assigned URL. The displayed screen is your login page.
- 2. Click **Login**. The **Sign In** Window is displayed:
- 3. Enter the **Username** and **Password**. Click on **Login**. The Getting Started page is displayed.

  Note

  - For new customers, who do not have an account use click here to register.
  - If you forgot your password, reset your password by clicking **Forgot Password?**

- The **Reset Password** window is displayed. Enter the **Username** and click on Reset.

Login Page Components

- 1. **Login**: The seller or customer uses the **Login** to gain access to the application.
- 2. **Register**: A new customer can **Register** here to access the seller's application.
- 3. **Products And Services**: Without logging in, the Customer can select the required category and land upon the order page. From here orders can be placed.
- 4. **Product Keyword Search Bar**: Here you can search specific products of interest. This directs to the order page.
- 5. **Cart**: The orders placed are reflected in the cart.
- 6. **Popular Links**: This section captures deals of the day, best-selling product, new arrivals, and popular & featured services.

Getting Started Page Components

The table below gives an overview of the main menu:

Main Menu	
Getting Started	Set up a marketplace by adding products & company details and set up payment gateways.
Dashboard	Provides data visualization of your key metrics. Gives an accurate picture of your sales performance. Explore recent orders and upcoming renewals with their status. Showcases the revenue by product. Gives an insight into customer support.
Customers	Add a new customer. View and edit the existing customer record. Have a clear picture of the customer profile including Subscriptions, Billing, Tickets, and Logs. Enable or Disable settings
Subscriptions	Manage Subscription

Orders	Add orders, view order summary & status, and cancel orders
Invoices	List view of invoices and status of generated invoices. Cancel Invoices
Storefront	Add products, pricing to your products, and coupons.
Logs	The activity & e-mail logs of the user
Settings	Customize various settings as per your preference

Product Banner: Displays all the products

Cart: Reflects the placed order

Quick links: By using these links which are accessible easily, you can set up your domain, customize your theme portal, configure the mail server and add an SSL digital certificate.

Getting Started

This section explains how to launch your marketplace.

To set up a ready-to-go marketplace, you need to:

- 1. Add Products
- 2. Add Company Profile
- 3. Payment Setup
- 4. View Marketplace

Note

It is not mandatory to proceed with the steps in order. You may first fill in the company info and then get back to add products. However, you add products before viewing your marketplace.

Add Product

The products can be added to the Marketplace one by one or the product list file can be imported. The billing frequency options and the pricing of the products can be set.

You can use one of the options:

- 1. Add Products Individually
- 2. Import Product List

Add Products Individually

To add products to your catalog:

- 1. Head to Getting Started > Add Products.
- 2. The **Add Product** form is displayed.
- 3. Click on **Add Product**
  The **Add Product** form is displayed:
  4. The next step is adding **Primary Category > Sub Category** and the respective product with their unique ID. This is a mandatory field.
  - To add Primary Category, click on **+**. The **Add Category** window is displayed.
  - Select the Primary Category from the **Parent Service Category** dropdown.
  - Enter the Sub Category in the **Service Category Name** textbox.
  - Click on **Choose File** to choose the icon of Service Category.
  - Describe the category in the **Category Description** textbox.
  - Click **Save**. This product is added to your Marketplace. We see that the product is also added to the **Product Banner**.

  5. The table below describes the fields to be filled in the Add Product form:

Field	Information	Required
Product Name	Name of the added product	
Product ID	Unique identifier of the added product	
Product Image	Icon of the added product **Add Product Image**	Optional
Publisher Name	Publisher of the product	Optional
Distributor	Distributor of the product	Optional
Billing Frequency	Billing frequency applicable for the product. **Billing Frequency** After setting the billing frequency, you can set up the pricing of the product	
Applicable Tax	Tax applicable for the product	

Price applicable from	Date from which the price is effective **Effective Date**	
Minimum Purchase Quantity	Minimum order of the product	
Maximum Purchase Quantity	Maximum order of the product	
Product Brochure	Description of the product, services, and features	Optional
Short Description	Provides a short description of the product	Optional
Long Description	Provides a detailed description of the product	Optional
Status	Set the status of the product Options: Publish: Publish the product at the Marketplace Draft: Saves the product for later use Disable: Deactivates the product	Optional
Import Products	The product list can be imported from an excel file to your store. **Import Products**	Optional
Product Features	Sets product features Example: 24 x 7 Service Support Promotion if applicable Extended Support	Optional
Additional Settings	Choose if you require domain verification	Optional

- 6. Click on **Save & Add more** to add more products to your catalog else click **Save & Next** to proceed.
- 7. A message confirms your product is added. Click on **Close**.
  Note:
  If the mandatory details are not filled in, you will not be able to save the added product. The required details that are not filled in will be highlighted as shown in the below figure.

Product Image

To add a product image icon:

- a. Click on **Choose File** to select the product image file from the Media Library. The **Media Library** window is displayed.
- b. Click on **Logo**. The thumbnails of various products are displayed. Choose the relevant logo for your product added.

Billing Frequency

This field is used to set the billing frequency options and pricing of the product. The options available are **Monthly, Quarterly, Half Yearly, One Time, and Pay-Per-Use monthly. Pay-Per-Use monthly** is a flexible mode as it depends on the duration of the usage.

- a. To set the billing frequency, select the options as applicable.
  Note:
  You can set more than one billing frequency option as per the product.
  Example: For a product added; **Half Yearly** and **Annually** options can be added

  b. After selecting the Billing Frequency, you have to set the product pricing for all the options.
  For sample, take the Half Yearly option:
  - Enter the Cost Price of the product.
  - Enter the **Markup %**
  - The Sell Price is displayed automatically.
  - Set the MRP of the product
- Repeat the above for all the options selected under the **Billing Frequency**.
- **Note:**
  The MRP of the product set should be greater than the Sell Price.If not, you can see the following message displayed:
  "Looks like your Sell Price is greater than MRP Price"

Price Effective Date

To select the price effective date:

- a. Click on , the calendar icon to set the price effective date.
- b. Use , to move to any other month of the present calendar year or any other year.
- c. Use , to move to the next month.
- d. Click Today to select the effective date as today's.
- e. Click Clear to cancel the date.

Import Product List

Alternative to adding products from the add product window, products can also be imported from an existing excel file. Here we upload the product list file and map the fields with the columns of the excel file.
Note:
The links in the Upload File window are the steps for importing the file. These links are visible in every step and highlight the step in the process.

To import product list:

- 1. Head to Getting Started > Ready To Go Marketplace > Add Product.
- 2. Click **Import Product** to start the process.

Step 1: Upload EXCEL FILE

This step uploads the file.

- a. Click on **Import Products** +. The Upload Excel File window is displayed.
  Note:
  - Before you import the file, you can download the sample excel template to look at the format of the data used. Click on **Sample Excel Template** to download the sample file. Maintain the same format of the data as the sample provided for successful upload
  - Make sure to overwrite products having the same SKU ID
- b. Click on or **Select Drop Files Here** to upload the product list file
- 4. Status (Active/Inactive/Terminated)

Step 2: Column Mapping

After the file is uploaded, you have to map the corresponding fields with the columns of the excel file.

- a. Click on **Column mapping**. The Column mapping window is displayed.
- b. Map the fields by selecting the respective columns. For example, if you have a column in your sheet named Customer Company, you need to map it with **Company Name**, and so on.
- c. Click on **Continue** to move to the next step or click **Back** to go to the **Upload Excel File** window.

Step 3: Import

Click on **Import** to upload the product list. The status window is displayed. Your product list file is imported.

Company Info

The company information and other details required for billing purposes are set in this section.

To enter your Company Info:

- 1. Click on **Company Info** from the Getting Started page. The Company Info form is displayed

2. Enter the following details to complete this step:

Field	Information	Required
Company Details		
Company Name	Organization name	
Company Website	Company website URL	Optional
Personal Details		
First Name Last Name	First name and Last name of the Seller	
User Name	**User Name** you would like to use for this portal	
Email	Email id for communication	
Billing Address		
Billing Address	Billing address	
Mailing Address		
Mailing Address	If your mailing address is the same as the billing address, check the box as given below: If the mailing address is the same, the fields of the mailing address are filled in automatically as soon as you check the box.	
Contact Information		
Contact No	Enter your contact information	
Mobile No	Enter your contact information	Optional
Financial Details		

GST/ TAX ID	GST Tax Identification number for billing purposes	
Company Incorporation ID	Company Incorporation ID or CID for billing purposes	
Tax-Exempt	If you are eligible for tax exemption, check **Tax Exempt**. If eligible, enter the **Tax Number**.	
Billing Information		
Order Prefix	Found at the beginning of the order number. Used for tracking and managing the orders	
Order Sequence Number	Used for tracking and managing orders	
Invoice Prefix	Found at the beginning of the order number. Used for tracking and managing the invoices	
Invoice Sequence Number	Used for tracking and managing invoices	
Company Logo		
Logo	Uploading your company logo **Note:**Use image of resolution 200px x 50px for best fit and accepts only jpeg, gif, png of max size 1MB	Optional
Small Logo	**Note:**Use image of resolution 100px x 100px for best fit and accepts only jpeg, gif, png of max size 1MB	Optional

- 3. Click on Save& Next to save your details and head to the next step

Payment Gateway Setup

You can access the **Payment Setup** by navigating to the Getting Started page and going to **Payment Setup**.

In this module, you will integrate both online and offline payment modes for the transaction.

- 1. Online Payment (Payment Gateway)
- 2. Offline Payment (Bank Details)

Set Up An Online Payment Gateway

There are two payment gateways to choose from. You can integrate either Paypal or Stripe or both as your transaction gateway.

To set up an online payment method, navigate to **Payment Setup** and click **Online Payment (Payment Gateway)**

Note

By default, the **Online Payment (Payment Gateway)** window is displayed. The **Paypal Gateway** setup screen is displayed.

To set Paypal as your transaction gateway:

- 1. Click on to enter the details.
- 2. Enter the display name
- 3. Enter the user name and password
- 4. Click on **Save** to save the PayPal gateway details.
- 5. Click on **Launch** to launch your Marketplace.This action rediects to your MarketPlace.
- 6. Enable the toggle button to activate the payment gateway. The Enable toggle button is at the top right-hand side of the Payment Methods window.
  Note:
  To deactivate the Paypal payment gateway, disable the **Enable** toggle button

To set Stripe as your transaction gateway:

- 1. Choose Stripe on the Payment Methods page.
- 2. Click to enter the details.
- 3. Enter the display name
- 4. Enter the API key
- 5. Enter the success URL and Cancel URL
- 6. Click on **Save** to save the PayPal gateway details.
- 7. Click on **Launch** to launch your Marketplace. This action redirects to your MarketPlace.
- 8. Enable the toggle button to activate the payment gateway. The Enable toggle button is at the top right-hand side of the Payment Methods window
  Note:
  To deactivate the Stripe payment gateway, disable the **Enable** toggle button

Set Up An Offline Payment Gateway

To set up an offline payment method, navigate to **Payment Setup** and click **Offline Payment (Bank Details)**

To add bank details to the offline payment mode:

- 1. Click **Add Bank**. The Add Bank window is displayed.

  2. Enter the following details to complete this step:

Field	Information	Required
Account Number	Your bank account information	
Bank Name	Your bank account information	
Payee/ Account Name	Your bank account information	
NEFT/RTGS/ACHE	Type of online transfer	
Address, Country, Bank Branch & City	Address of the bank	

- 3. Enable the **Status** button to activate the payment gateway. The Status toggle button is at the bottom left-hand side of the Add Bank window
- 4. Click **Save**. The added bank details are updated in the **Bank List** as shown below. To see the Bank list, navigate to **Payment Setup** and click Offline Payment (Bank Details)
  Note:
  Use **First, Previous, Next, Last** links at the bottom right of the Bank List screen for navigating through the list.
  the Payment Methods window.
  Note:
  To deactivate the Paypal payment gateway, disable the **Enable** toggle button

To edit bank information:

- 1. To edit the added bank details, go to the **Bank List**.
- 2. Click on more icon, present at the end of the record that has to be edited
- 3. Select the **Edit** option
- 4. The Add Bank window with the furnished details is displayed.
- 5. Edit the details that have to be changed.
- 6. Click Save to save the changes made.

To delete bank account:

- 1. To delete the bank account, go to the Bank List.
- 2. Click on more icon, present at the end of the record that has to be edited
- 3. Select the **Delete** option. A confirmation pop-up window is displayed.
- 4. Click **Yes, Delete it!** if you are sure of deleting the bank information from the list. Click **No**, to cancel the deletion.

View Marketplace

Now you are all set! You have launched your Marketplace by adding products, setting up a pricing list, and the payment gateway.

You can view your Marketplace by heading to the Getting Started page and going to **View Marketplace**

The catalog lists all products you have added with the respective **Product Name, ID, Logo, Markup Price, and Selling Price**.

Sample of a product from the catalog:

This product lists the information provided from the Add Product

From here, you can initiate an order following any of the options:

- 1. Add To Cart
- 2. View Details

Add To Cart

To order products:

- 1. Select the product from the catalog
- 2. Click **Add to Cart**. The product is added to the cart.
  Note:
  After the product is added you can hover over the cart icon, to view the product in your cart. The cart icon, is present at the top right of the MarketPlace.
- 3. Click on the check out icon, to check out the ordered product. The Order Confirmation page is displayed
  Note:
  If you would opt to change the quantity and the term of the ordered product, you can also make the changes in this screen. The orderd item can also be

deleted by clicking the cancel icon, present at the end of each product.

- 4. Click **Proceed to Checkout**.

  5. The next step requires the **Customer Details** to whom the order is placed.
  - **Existing Customer**: Select the existing customer from the list.
  - **New Customer**: If the customer is new, click on **Register** for registering the customer.
- 6. Click on **Proceed to Payment**. The **Payment** page is displayed:

  The two options of payment are:
  - Pay using credit
  - Pay using offline/ bank transfer

Pay using Credit

This option is enabled only if:

- 1. The reseller enables the credit option in the Customer's Setting.
- 2. There is no credit overdue.

To pay from credit, follow the steps:

- 1. Click the add icon, **+** on the Pay From Credit tab to use the credit option.
  Note:
  You can also add credit to the customer's account.
- 2. Enter the Coupon Code, if applicable.
- 3. Click **Proceed to Payment**.
- 4. The **Order Confirmation** page is displayed:

Pay using Offline/ Bank Transfer

To pay us, follow the steps::

- 1. Click the add icon, **+** on the Pay Offline/ Bank Transfer tab.
- 1. The bank details available are listed for the transaction.
- 2. Enter the Coupon Code, if applicable.
- 3. Transfer the amount payable using the bank details provided.
- 4. Mail the transaction details to **billing@appgallop.com** or raise a ticket to the Billing department from the customer portal.
- 5. Click **Place Order**.
- 6. The **Order Confirmation** page is displayed:

Order Initialised from View Detail

Click on **View Detail** for the product details in your Marketplace. You can also order the products from this page.

To order product:

- 1. Select the term applicable.
- 2. Choose the quantity by selecting + or - accordingly for increasing or decreasing the item.
- 3. Click on **Add To Cart**. The product is added to the cart.

Dashboard

The Dashboard is a holistic view of an up-to-date measure of your business metrics at a glance.

Here you can set performance goals, define & analyse key metrics, view customer & sales churn, information on new sign-ups.

The various sections of the dashboard are:

- 1. **Key Metrics**: visualize your annual & monthly recurring revenues
- 2. **New Accounts**: highlights the new sign-ups with status
- 3. **Recent Orders**: a quick overview of recent orders with status
- 4. **Upcoming Renewals**: glance of renewals with their expiry date
- 5. **Revenue by product category**: analyses and compares revenue by category
- 6. **New Vs Renewal**: compares renewal with new

Key Metrics

This graphical representation tracks your revenue, one of the significant metrics. Revenue analysis helps you in thoroughly analysing and planning.

Features:

- 1. Visualize the comparison of annual and monthly recurring revenue.
- 2. Monitor, compare and analyse the revenue incurred towards Perpetual & Subscription products.
- 3. Analyse revenue growth or revenue drop
- 4. Keep track of your target.

New Accounts

This section highlights the **New Signups** (past 7- or 30- days) in a table view. The status of the signup is displayed with the primary details. This gives you a good perspective on the sign-ups.

Recent Orders

Recent Orders provides a quick overview of the past 7- or 30-days order summary. The table view lists the order ID, order date, cost price, and the amount with the order status.

Upcoming Renewals

Upcoming Renewals shows when the products are set to renew with the days left for renewal, quantity, amount, and status for the next 7- or 30- days.

Revenue By Product Category

Revenue by product tracks and compares the performance by product categories. This helps you in comparing revenues incurred by the categories.

New Vs Renewal

Compares new with renewal

Sales Dashboard

Sales reports are focused on details of metrics that provide a broad overview of the sales cycle; from deals to sales generated.

Reporting on sales include:

- 1. Sales Performance: monthly/ annual sales report and compares with the target.
- 2. Monthly Deals by Source
- 3. Won Deals
- 4. Deal Win Rate
- 5. Recent Sale Deals
- 6. Deal Summary

Sales Performance

A sales Performance dashboard provides you a snapshot of annual and monthly sales, measures it against the target. This overview helps you see how your actual sales performance is compared with the set goals.

Monthly Deals by Source

This report gives an understanding of where your deals are coming from. You can use this to prioritize the deals that require close attention, categories qualified and unqualified deals and the number of deals required to attain the monthly target.

Won Deals

Won Deals lists the closed deals in a month with the sales generated and the assignee of the deal. This outlines you with information on the sales cycle length and the assignee performance.

Deal Win Rate

Deal win rate is used to track percentage of deals closed for a specific period.

It is calculated as **Won Deals/Won Deals + Non-Won Deals**.

Here the conversion rate is visualized which tells you the way you are progressing in converting opportunities to won deals.

Recent Sale Deals

This table view lists the sale deals with their status information. The expected closing date gives you a glance of the conversion time it takes and bring in change in your sales strategy, if required.

Deal Summary

Manage Your Customers

You can use the Customers section to:

- 1. **Customers**: Add, view, edit and search customer profile.
- 2. **Subscriptions**: View and manage Subscriptions.
- 3. **Orders & Billing**: View and manage orders, invoices, receipts and ledgers
- 4. **Ticket**: Add and manage tickets
- 5. **Logs**: Registers activities and accesses email logs
- 6. **Settings**: Configure different settings for a specific customer

Customer Window

Go to **Customers**

The **Customer Window** is displayed

This section allows you to add customers, view and edit customers using the more option at the end of each customer details and search customers using the search bar present at the top of the list.

Add Customers

To add customers one by one:

- 1. Go to **Customers > Add Customers**. The **Add Customers** form is displayed:

2. Enter the following details to complete this step:

Field	Information	Required
Company Details		
Company Name	Organization name	
Company Website	Domain Name **Note:** Make sure to enter the domain name in the Company Website field, instead of the URL.	Optional
Personal Details		
First Name Last Name	First name and Last name of the Customer	
User Name	User Name must be unique. **Note:** If the User Name you had entered is available, you will see a checkmark. Now you can move on to the next information.	
Email	Email id of the customer for communication	
Billing Address		
Billing Address	Billing address	
Mailing Address		
Mailing Address	To use the same address as your billing address, click the check box as below: If the mailing address is different, enter the complete address. **Note:** If the mailing address is the same, the fields of the mailing address are filled in automatically as soon as you check the box.	
Contact Information		
Contact No	The country code is displayed automatically.	
Mobile No	Enter your contact information	Optional
Financial Details		

Credit Limit	Maximum amount of credit offered to the customer	Optional
Company Incorporation ID	Company Incorporation ID or CID for billing purposes	
GST/ TAX ID	GST Tax Identification number for billing purposes	
Tax-Exempt	If you are eligible for tax exemption, check **Tax Exempt**. If eligible, enter the **Tax Number**.	
Other Details		
Currency	Currency of the customer	
Status	• Active: Customer is presently availing your service. • Inactive: Customer is not able to access the portal. • Terminated: Customer has permanently stopped using your service or you have opted to terminate the account.	

- 3. Click on Save once the details are added. This will successfully add the customer to the list of customers on the Customer Window page.

Import Customer List

Alternative to adding customers from the add customer window, customers can also be imported from an existing excel file. Here we upload the customer list file and map the fields with the columns of the excel file.

Note

The links in the Upload File window are the steps for importing the file. These links are visible in every step and highlight the step in the process.

To import the customer list file:

Select Customers > Actions > Import

Step 1: Upload EXCEL FILE

This step uploads the file.

- a. Click on Import Products +. The Upload Excel File window is displayed.

  Note:

  - Before you import the file, you can download the sample excel template to look at the format of the data used. Click on **Sample Excel Template** to download the sample file. Maintain the same format of the data as the sample provided for successful upload
  - Make sure to overwrite products having the same SKU ID

- b. Click on or **Select Drop Files Here** to upload the product list file
- 4. Status (Active/Inactive/Terminated)

Step 2: Column Mapping

After the file is uploaded, you have to map the corresponding fields with the columns of the excel file.

- a. Click on **Column mapping**. The Column mapping window is displayed.
- b. Map the fields by selecting the respective columns. For example, if you have a column in your sheet named Customer Company, you need to map it with **Company Name**, and so on.
- c. Click on **Continue** to move to the next step or click **Back** to go to the **Upload Excel File** window.

Step 3: Import

Click on **Import** to upload the product list. The status window is displayed. Your product list file is imported.

Customer Profile

To access the details of the customer

- 1. Navigate to **Customers**. Customer List screen is displayed.
- 2. By clicking on any of the details of a customer, you will land on the **Customer Profile** of that specific customer.

  The details of the customer in the list include:

  - a. **Account Name**: implies the Company Name
  - b. **Primary Contact & Email**

    c. **Status** Status can be one of the following:

    - **Active**: Customer is presently availing your service
    - **Inactive**: Customer is not able to access your service.
    - **Terminated**: Customer has permanently stopped using your service or you have opted to terminate their account.

To view the Customer Profile:

- 1. Click on any of the details of a customer of your interest.
  For example: If you click on Account Name, Cloud Pvt Ltd as in the above figure, you will be directed to the profile page of that customer:

The following components are present throughout the windows of the customer profile screen:

- 1. Account Number and Company Name
- 2. Customers Button: Directs to the Customer List

  3. Customer Profile Sections:

  - Summary
  - Subscriptions
  - Billing
  - Tickets
  - Logs
  - Settings

Customer Summary

Customers > Customer Profile

Customer Summary provides the highlights of the selected customer. The Customer Summary screen is organized into various sections which give you an understanding of the customer.

The customer's contact information, recent orders, credit/wallet, monthly spend, annual spend, due invoices, spend analysis, complaints resolved, upcoming renewals, and a comparison of new and renewal services are included in the summary.

To view the customer summary:

Select the Customer and click on any of the listed details. The Customer Summary screen is displayed:

Customer Summary Screen	What does it say?
Customer's Contact Information	Primary contact name and contact number Email Price List set for this customer Reset Password link

Recent Orders	By selecting any one of the options, the orders of the last 7 days or 30 days can be viewed.
Dashboard	Dashboard view of credit/wallet, monthly spend, annual spend, and due invoices.
Spend Analysis	Analyses the expenditure of the past 12 consecutive months
Upcoming Renewals	Product list with the upcoming renewal details like due date, days left, quantity, and status.
New Vs Renewal	Total billing of new and renewal subscriptions on a monthly basis.

Subscriptions

Customers > Customer Profile > Subscriptions

This page lists all the subscriptions that a customer had purchased. The details include name, price, expiry date, billing date, and status. In this section, you can:

- 1. View Subscriptions
- 2. Manage Subscriptions

View Subscriptions

To view the subscriptions:

Connect to **Customer Profile** page. Click on **Subscriptions**. The subscription list with the price, expiry date of subscription & billing, and status.

Subscription is displayed:

Manage Subscriptions

Subscription Management helps you:

- 1. Change the status of the subscriptions
- 2. Schedule the subscription
- 3. Schedule the billing renewal

To manage the subscriptions:

Click on the **Subscription Name** or **More Actions**, you will be directed to the **Subscription Management** screen.

A more detailed view of a specific subscription including the Subscription Scheduler and Billing Renewal Scheduler is displayed:

This page lists the complete details like quantity, subscription start, and expiry date, billing start and end date, billing frequency, renew price, and last modified date. The last modified date lists the date of recent changes.

Subscription Status Change

A subscription goes through various states. These include:

- 1. **Active**: When you approve a subscription, it goes to an active state. The customer can use the subscription.
- 2. **Cancelled**: When you cancel a subscription, it goes to cancelled state and cannot be reactivated.
- 3. **Pending**: The subscription is pending until the validation is complete. You can either approve or reject the subscription.
- 4. **Suspended**: The subscription is paused temporarily and can be reactivated later.
- 5. **Terminated**: The subscription can no longer be used and cannot be reactivated.

To change the subscription status:

- 1. Go to **Customer Profile** page and select Subscription. The **Subscription Management** page is displayed
- 2. Click on the edit, icon.
- 3. Select the status from the list of dropdown options.
- 4. Click on the checkmark, to confirm the status change else click on the cancel icon, to cancel it.

- 5. On clicking the checkmark, you will see a confirmation pop-up window. Click Yes! to confirm else click Cancel to cancel the status change.
- 6. Once you confirm, a success message confirming the status change is displayed:

Subscription Scheduler

To schedule the subscription:

- 1. Navigate to **Customer Profile** page and select Subscription. The **Subscription Management** page is displayed.
- 2. The **Subscription Scheduler** is found at the top right of the page.

  3. Enable **Auto Renew** to process automatic renewals at the end of the subscription term.
  Note:

  - Auto-Renew is set on the **Customer Settings** page.
  - The subscription expiry date is displayed in the scheduler.
  - The scheduler also highlights the post subscription and pending day count.
  - If the billing is overdue, you will see a negative count.

Billing Renewal Scheduler

To schedule the billing renewal:

- 1. Connect to the **Customer Profile** and select Subscription. The **Subscription Management** page is displayed:
- 2. The **Billing Renewal Scheduler** is found at the bottom right of the page.
- 3. Enable Auto-Renew for turning on the recurring billing cycle. A confirmation popup window is displayed:

  Note:

  - Auto-Renew is set on the Customer Settings page.
  - The Billing End Date is displayed in the scheduler.
  - The scheduler also highlights the post-billing day count and the leftover day count for the next billing cycle.
  - If the billing is overdue, you will see a negative count.

Orders and Billing

Customers > Customer Profile > Billing

Here you can manage orders, view invoices, receipts, and the ledger for a specific customer.

The Billing page has four sections:

- 1. **Order**: To see the past orders, edit, and cancel the existing orders
- 2. **Invoices**: To see the invoices and cancel an invoice
- 3. **Receipts**: To see the generated receipts of all the orders
- 3. **Ledger**: To see the complete transaction history

View Orders

To view the past orders:

- 1. Connect to **Customer Profile** page and select **Billing**. The **Billing page** is displayed:

Order history lists the orders in chronological order and include the following:

- Order No
- Order Date
- Cost Price
- Amount
- Status

- The orders can be searched by any of the above details using the search bar

  2. Click on the **Order Number** or the **More Actions** button at the end of the order and select **View Order** to view the following two sections: The first section of the order displays the following:

  - Order No and Date of purchase
  - Tax ID
  - Status (Pending/ Complete/ Cancelled)
  - Billing Address, Email, and contact information
  - Purchaser of the product

  The second section of the order displays the following:

  - Product name
  - Term
  - Quantity
  - Unit price
  - Amount
  - Cost price
  - Discount
  - Tax
  - Total Amount
  - Coupon if applicable
  - Grand Total after applying the Coupon

Note

You can print the order, download the order as pdf or email the order using the options at the upper-right corner of the page.

Edit Orders

- 1. Go to **[Customer Profile]** and select Billing. The **Billing page** is displayed
- 2. Click on the **More Actions** and select **Edit Order** to change the order details. The **Edit Order** page is displayed:

Delete Orders

To delete a particular order:

- 1. Go to **[Customer Profile]** and select **Billing**. The **Billing page** is displayed.

- 2. Click on the **More actions** button at the end of the order that has to be deleted and select **Cancel Order** to delete the order.
- 3. A confirmation popup window is displayed. Click **Yes** to cancel the order and **No** to cancel the deletion.
- 4. On clicking **Yes**, success message is displayed. Click **Ok** to close the window.

View Invoices

To view the generated invoices:

- 1. Connect to **Customer Profile** page and select **Billing**. The **Billing page** is displayed:

  2. Select the **Invoices** tab. Invoice history lists the invoices in chronological order and includes the following:

  - Invoice No and date
  - Cost Price
  - Amount
  - Receipt No
  - Mode of Payment (Offline, Credit)
  - Billing Status (Paid, Unpaid)

  3. Click on the **Invoice Number** or the **More Actions** button at the end of the invoice.The Invoice is displayed with two sections. The first section of the invoice displays the following:

  - Invoice No and Date of purchase
  - Tax ID
  - Status can take Unpaid or paid status
  - Billing Address, Email, and contact information
  - Purchaser of the product

  The second section of the invoice displays the following:

  - Product name
  - Term
  - Quantity
  - Unit price
  - Amount
  - Cost price
  - Discount
  - Tax
  - Total Amount and Grand Total

Cancel Invoices

To cancel an invoice of a particular customer:

- 1. Go to **Customer Profile** and select **Billing**.
- 2. Select the Invoices tab
- 2. Click on the **More actions** button at the end of the invoice that has to be deleted and select **Cancel Invoice** to delete the invoice.

- 3. A confirmation popup window is displayed. Click **Yes** to cancel the invoice and **No** to cancel the deletion.
- 4. On clicking **Yes**, success message is displayed. Click **Ok** to close the window.

Receipt

Add Receipts

To add a receipt for an order:

- 1. Go to **Customer Profile** and select **Receipt**.
- 2. Click **Add Receipt**. The **Add Receipt** form is displayed:

3. Enter the following details:

Field	Description	Required
Date	Select the date, the date at which payment was initiated	
Amount	Enter the order / invoice amount	
Transaction ID	Enter the transaction ID of the payment	Optional
Payment Method	Specify the payment method (online/ offline payment modes)	
Order/ Invoice	Select order or invoice. Order numbers or Invoice numbers are generated as per the selection	
Description	Brief about the transaction	

- 4. Click **Save**. On saving, it gets added to the receipt list.

Manage Receipts

Here you can view and edit the generated receipts of a selected customer.

View Receipts

To view the generated receipts:

- 1. Navigate to the Customer Profile and select **Receipts**.

2. Receipts history lists all the receipts in chronological order and includes the details added in the **Add Receipt** section.

- Receipt Number and date
- Amount
- Transaction ID: identifies the purchase by the customer as per the payment mode
- Description: Includes description about the
- Payment Method

Edit Receipts

To edit the generated receipts:

- 1. Navigate to the and select **Receipts**.
- 2. Click on the **More actions** button at the end of the receipt that has to be edited.

Ledger

Customers > Customer Profile > Ledger

The overall transactions, inclusive of all credits and debits of a selected customer can be viewed in the Ledger page. On adding a receipt In the Receipt section, the ledger also gets updated automatically based on the information given

View Ledger

To view the ledger:

- 1. Connect to the **Customer Profile** page and select **Ledger**.

  2. The ledger page displays the following details from the add receipt section in chronological order

  - Date and time of the receipt creation
  - Reference Number which implies the type of transaction
  - Description
  - Debit & Credit Amount
  - Cumulative Balance

View and Edit Receipt

From the ledger section, you can also view and edit the receipt of the specific transaction.

- 1. Connect to the **Customer Profile** page and select **Ledger**.
- 2. Click on the **More actions** button at the end of the ledger whose transaction receipt has to be viewed or edited.

Tickets

Customers > Customer Profile > Tickets

This section helps you to centrally manage service requests from various customers.

The following actions can be performed here:

- 1. **Add**: Add tickets
- 2. **View**: View the ticket's summary.
- 3. **Reply**: View the ticket and reply
- 4. **Add Department**: Add a relevant department for resolving issue.
- 5. **Manage**: Allocate assignee, merge tickets, move the tickets to a different department.

Add Tickets

To add tickets:

- 1. Navigate to the Customer Profile page and select Tickets. The Ticket Management page is displayed:
- 2. Click Add Ticket to add a support ticket.

   3. Enter the following details:

Field	Description	Required
Client	Customer whose request have to be attended	
Department	Allocation of department according to the issue	
Product/ Subscription	Products related to that specific client is seen in the dropdown. Select the related product	
Subject	Summarizes the issue faced	
Post Reply	Brief the concern of the client	
Attachments	Allows to add attachments of jpeg, gif, png, pdf, doc of max size 5MB	Optional
Priority	Set the priority based on the severity of the issue Options: Low, Medium, High and Urgent	Optional

Ticket Status	Tracks the progress of the ticket. Select a state that can be applied: • Open: At the time of creation • Answered: • Inprocess: • Resolved: solution is provided • Closed: When a ticket is closed, cannot be changed

- 4. Click Save. This action saves the ticket details and lists the ticket in the **Ticket Management** page.

Support Tickets Overview

The Support Tickets page lists all the tickets raised by a specific customer. This screen gives an overview of the ticket history of the customer inclusive of the status count of all tickets.

The list consists of the following:

- 1. Ticket Number
- 2. Department that is assigned
- 3. Subject, summarizing the issue
- 4. Requested by
- 5. Assignee
- 6. Last Activity
- 7. Priority
- 8. Status

To view the support tickets list:

Navigate to the page and select **Tickets > Add Tickets > Support Tickets**. The Support Tickets page is displayed:

View Ticket and Reply

To view a support ticket and reply:

- 1. Navigate to the **[Customer Profile]** page and select **Tickets > Add Tickets > Support Tickets**. Click on the **Ticket #** of a specific ticket that has to be viewed. The View ticket page is displayed:

  2. This screen has two sections, of which the first section has the ticket description and **General Information** and the second section has the reply part to be posted.
  Note:

  - The **General Information** has the details of the ticket provided
  - The reply can be posted with attachments, if required and accepts only jpeg, gif, png, pdf, doc of max size 5MB.

- 3. You have an option to edit the ticket details like status, priority, assignee, move, and merge to in **General Information** present in the upper-right of the page.
  Note:
  Click on the edit icon to change the support ticket details in the **General Information**.

  4. Set the ticket status accordingly. It can take any of the options:

  - Open
  - Inprocess
  - Answered

- Resolved
- Closed

- 5. Click Reply to post the message to the requester.

Add Department

Any department can be added under the support system if required. The status of the tickets that are set by the departments are also taken care in this module.

To add a department:

- 1. Navigate to the **Customer Profile** page and select **Tickets > Add Ticket > Departments**. The Add Department page is displayed: (navigation)
- 2. Select the Department to be added.
- 3. Enter the description of the query relevant to the department.
- 4. Enter the email of the initiator.
- 5. Choose an icon related to a department.
- 6. Set the status as **Active** if this department is enabled under support else as **Inactive**. It can be set as active when required.

Manage Tickets

Various other actions that can be performed on the ticket are:

- 1. **Assign**: Ticket is assigned to an assignee.
- 2. **Merge**: Ticket is merged to another ticket.
  Example of a merging ticket scenario: you receive two requests about the same issue from the same customer.
- 3. **Move**: Ticket is moved to another department.

Assign Tickets

A ticket can be assigned to a relevant support team member.

To assign a ticket:

- 1. Go to the **Customer Profile** and select **Tickets > Add Tickets > Support Tickets**. Check mark the ticket that has to be assigned.
- 2. Select **Assign To** from **Actions** dropdown present at the right of the screen as shown below:
- 3. The **Assign To** window is displayed:
- 4. Select the assignee.
- 5. Click Assign.
- 6. A confirmation popup window is displayed:
- 7. Click **Yes** to confirm and **No** to cancel the assignment action. On clicking **Yes**, assignee success message is displayed:

  8. Click **Ok** to close the message box.
  Note:

  - Assignee can also be assigned from the **General Information** section of the **View and Reply** Ticket window
  - Multiple tickets can also be selected for assigning to an assignee.

Merge Tickets

A ticket can be combined with another ticket to avoid duplicate entries.

To merge tickets, follow the steps below:

- 1. Go to the **Customer Profile** and select **Tickets > Add Tickets > Support Tickets**. Check mark the ticket that has to be assigned.
- 2. Select **Merge** from **Actions** dropdown present at the right of the screen as shown below:
- 3. The **Merge To** window is displayed:
- 4. Select the ticket Number.
- 5. Click **Merge**.
- 6. A confirmation popup window is displayed:
- 7. Click **Yes** to confirm and **Cancel** to withdraw the merging action. On clicking **Yes**, a success message is displayed:

  8. Click **Ok** to close the message box.
  Note:

  - Ticket Merge can also be initiated from the **General Information** section of the **View and Reply** Ticket window
  - Multiple tickets can also be merged into a single ticket.

Move Tickets

A ticket can be routed to different department for resolving the issue using **Move Ticket**option.

To move a ticket to another department:

- 1. Go to the **Customer Profile** and select **Tickets > Add Tickets > Support Tickets**. Check mark the ticket that has to be assigned.
- 2. Select **Move To** from **Actions** dropdown present at the right of the screen as shown below:
- 3. The **Move To** window is displayed:
- 4. Select the department to route the ticket.
- 5. Click **Move**.
- 6. A confirmation popup window is displayed:
- 7. Click **Yes** to confirm and **No** to withdraw the movoe. On clicking **Yes**, a success message is displayed:

  8. Click **Ok** to close the message box.
  Note:

  - Ticket Move can also be initiated from the **General Information** section of the **View and Reply** Ticket window
  - Multiple tickets can also be move to a concerned department for further proceeding.

Logs

Customers > Customer Profile > Logs

Logs allows you to track and analyse the activities in the seller portal. Activities include that of the seller and the customer. Email logs can also be accessed here.

View Activity Logs

To view logs:

Head to the **Customer Profile** page and select **Logs**. The **Activity** screen is displayed:

The following details are present in the Activity:

- 1. Date of the Activity & the Activity: You can view the events performed and the date to track user activity.
- 2. Module/ Function Name: Defines the module accessed by the user

- 3. User & IP address: Specifies the user and IP address.
  Example: A user A with IP address has accessed the Add Product screen on 23rd March 2022 helps you to keep track of the events by this customer.

View E-mail Logs

To view e-mail logs:

Navigate to the **Customer Profile** page and select **Logs > Email**. The **Email Logs** screen is displayed with the following:

- 1. Date & Subject of the E-mail
- 2. Module/ Function
- 3. User and IP Address
  The above details help you to track the e-mail sent to a specific customer related to a particular module.

Settings

Customers > Customer Profile > Settings

Settings module is used to enable or disable various functionalities with respect to a specific customer.

To manage settings:

Head to the **Customer Profile** page and select **Settings**. The **Settings** screen is displayed:

The following functionalities can be set in this section

- 1. Credit and Payment
- 2. Billing Date
- 3. Revenue Target
- 4. Spend Target
- 5. Order Configuration
- 6. Invoice Configuration
- 7. Subscription Settings
- 8. Disable Services
- 9. Scheduler Settings
- 10. Ticket
- 11. Roles and User Management
- 12. Email Templates

Following are the various functionalities screenshots of the settings section:

Credit and Payment

Billing Date or Anniversary Date

Revenue Targets

Spend Targets

Order Configuration

Invoice Configuration

Subscription Settings

Disable Services

[Scheduler Settings](#)

[Ticket](#)

[Roles and User Management](#)

[Email Templates](#)

The description of the fields of the various Settings are listed below:

Field	Description
Credit and Payment	
Credit wallet	Allows your customer to avail credit facility. The customer can pay through credit balance facility. Enable or disable the credit option accordingly.
Credit Limit	Set the credit limit for the customer if Credit Wallet is enabled.
Over usage	Checkmark **Over Usage** if permitted. If yes, specify the overuse amount above credit or as a percentage of the credit wallet.
Tax Number	Tax Number of the customer.
Preferred Payment Method	Credit wallet or PayPal are the options. These options are added from the **Payment Setup** page.
Billing Date	
Billing Date or Anniversary Date	The subscription's billing date can be set in this section. Select the **Pay As You Go** option or **Billing date**. By selecting Pay As You Go, the billing is initiated at the end of the month.
Revenue Targets	
Perpetual Revenue	Revenue generated from perpetual licensing which is billed up-front.
Monthly Recurring Revenue	Stable revenue expected to receive monthly for offerings over a period of time.
Spend Targets	
Monthly Spend & Annual Spend	Permissible spend targets of the customer
Order Configuration	
Quotation & Order Placement	Enable or disable Generate **Quotation** on placing order. Enable or disable **Order Placement** accordingly to a specific customer.
Order Processing	An order can be fulfilled by following different ways: • Processing manually • Processing from credit wallet • Processing order as soon as the order received
Invoice Configuration	
Invoice Creation	An Invoice can be created on the following occasions: • As soon as an order is provisioned • On the Subscription Anniversary date
Subscription Settings	
Subscription & Billing Auto Renew	Configure subscription and billing for auto renewal. **Note:** This setting can also be initiated from the Subscription section using Subscription Scheduler and Billing Renewal Scheduler.
Service Suspension Request	Service can be suspended/ effective using this setting.
Upgrade/ Degrade quantity	Enable/ disable resize (upgrade/ downgrade) quantity feature to increase/decrease the license count.
Add on Purchase	Enable/ disable Add ons for the subscriptions purchased. Add ons gives the flexibility in adding features to the existing subscription
Default Margin	Profit margin expected from this customer that has to be used in the price book.
Disable Services	
You can disable any specific product to place order	
Scheduler Settings	

Enable/ disable notifications for

- Reminder for Renewal (if Auto Renewal is disabled), Payment, Overdue reminders.
- Service Suspension/ Termination
- Renewal Invoice

Ticket

Enable/disable access to help desk

Roles and User Management

User	Creating and managing user accounts
Roles	Enable certain roles and thereby administering users with access to specific/ all modules

Email Templates

Enable or disable various email templates on different events.

Subscriptions

The **Subscriptions** menu holds the details of all the subscriptions of your customers. You can view and manage all the subscriptions on this page.

Here you can:

- 1. View Subscription Summary
- 2. View and Manage Subscription
- 3. Access Subscription Scheduler
- 4. Access Billing Renewal Scheduler
- 5. Change Subscription status

View Subscription Summary

To view Subscription Summary:

Connect to Subscriptions. The **Subscriptions Summary** is displayed with all the subscriptions of all your customers.

The components of a subscription are:

- 1. Service Details: This includes Subscription name, Billing Frequency, Quantity, Customer who owns the Subscription, and Price of the Subscription.
- 2. Subscription & Billing Expiry Date
- 3. Subscription Status Bar
- 4. Subscription Search Bar

Subscription Status Bar

The Subscription Status Bar, located at the top of the page gives the summary of the total count of the subscriptions under each status.

Subscription Search Bar

The Subscription Search Bar lists the subscription/ subscriptions based on your search. Subscriptions can be searched by Subscription Name, Customer, Subscription Expiry Date, Billing Expiry Date and Status.

View and Manage Subscription

You can view individual subscriptions information with the customer's name, order/invoice details, subscription status, subscription scheduler, and billing renewal scheduler.

This is where you can:

- 1. View subscription
- 2. Access subscription scheduler
- 3. Access billing renewal scheduler
- 4. Change subscription status

Note

The Subscription Management page can also be accessed from the Customers section.

View Subscription

To view individual subscription details:

- 1. Go to Getting Started > Subscriptions and click on the **Subscription Name** of your interest. The **Subscription Management page** is displayed:
- 2. The Subscription Summary along with Subscription Scheduler, Billing Renewal Scheduler, Order/ Invoice details are shown.

Note

You can also navigate to the Subscription Summary of a **specific** customer by clicking on more actions, and selecting **View Service**.

Access Subscription Scheduler

The **Subscription Scheduler** allows you to automatically renew the subscription or opt for manual renewal. Enabling **Auto Renew** renews the subscription before the current term ends. You can turn it off to allow the manual renewal of the subscription.

To access the Subscription Scheduler:

- 1. Go to Subscriptions > Subscription Management. The Scheduler is seen at the top right of the page.
- 2. Turn Auto Renew on for automatic renewal of the subscription before the current term expires else turn it off for manual renewal.

Note

The Subscription Scheduler can also be accessed from the **Customers** section

To know in more detail, connect to Subscription Scheduler of the Customers Section

Billing Renewal Scheduler

Recurring billing can be turned on or off in the Billing Renewal Scheduler. By enabling it, you opt for automatic billing as per the selected billing option.

To access the Billing Renewal Scheduler:

- 1. Go to **Subscriptions > Subscription Management**. The Scheduler is seen at the bottom right of the page.
- 2. Turn it on for auto billing.

Note

The **Billing Renewal Scheduler** can also be accessed from the **Customers** section.

To know in more detail, connect to Billing Renewal Scheduler of the Customer's section.

Change Subscription Status

The status of the subscription can be set as per your choice. It falls under 5 stages:

- 1. **Active**: When you approve a subscription, it goes to an active state. The customer can use the subscription.
- 2. **Cancelled**: When you cancel a subscription, it goes to cancelled state and cannot be reactivated.
- 3. **Pending**: The subscription is pending until the validation is complete. You can either approve or reject the subscription.
- 4. **Suspended**: The subscription is paused temporarily and can be reactivated later.
- 5. **Terminated**: The subscription can no longer be used and cannot be reactivated.

To change subscription status

- 1. Go to **Subscriptions > Subscription Management**.
- 2. Click on the edit, icon
- 3. Select the status from the list of dropdown options
- 4. Click on the checkmark, to confirm the status change else click on the cancel icon, to cancel it.

Note

The **Subscription Status Change** can also be accessed from the **Customers** section.

To know in more detail, connect to Subscription Status Change of the Customer Section.

Orders

The Orders page provides a look back at all the orders of all the customers, place orders from your catalog, check out your placed orders, and review your orders.

Head to the Orders page from the main menu.

Here you can:

- 1. View Order Summary

- 2. [Add Order]
- 2. [View, Edit, Cancel Order]
- 3. [Print/Download/Email Order]

Order Summary

To view Order Summary:

Go to Orders. The **Order Summary** is displayed with all the orders of all your customers.

The Order Summary lists the following:

- 1. Order No, Order Date, Customer who is the product owner.
- 2. Cost Price and the Amount
- 3. Order Status: Pending / Complete / Cancelled

Order Status

An order may take one of the following statuses:

- 1. Pending
- 2. Complete
- 3. Inprocess
- 4. Cancelled

When an order is placed for a specific customer, the order status takes the value as pending or complete.

An order goes to **pending status** for the following reasons:

- Previous credit due is not cleared by the customer; hence not able to proceed with the payment

An order goes to **complete status** in one of the below cases:

- Payment is cleared using credit/ online payment gateways/ offline transaction.
- When the seller approves the pending order.

An order takes cancelled status when an order is cancelled and is no longer in effect. A cancelled order can only be viewed and cannot be approved further.

Product Catalog

The product catalog is available in two views:

- 1. **Catalog View**: The products are listed with their images, units, and pricing information. From this page, products can be added to the cart and you can navigate to the ListView.
- 2. **List View**: The list view shows the catalog in the form of a table. From this page, you can add products to your catalog, navigate to the Catalog View and edit the product information.

Add order from Catalog View

Here you can add orders from your catalog. The catalog lists the products added from the **Add Product** module.

To add an order from the Catalog View:

- 1. Go to **Orders > Add Order**
- 2. The Product Catalog is displayed

- 3. Locate the product/ products you would like to add.
- 4. Click **Add to Cart**.
- 5. If a product is added with domain authentification, you have to add an existing domain or create a new domain to proceed.

Case 1:

New Domain

- 1. Click **Create New Domain** and enter the domain name of your preference and hit **Search**.

- 6. The product is added and the shopping cart located at the top-right of the window reflects the additions.
- 7. Hover your mouse over the cart and click the checkout icon .

Checkout

The following steps list the checkout process:

- 1. Once a product is added, the cart reflects the product added.
- 2. Hover your mouse over the cart and click the checkout icon, .
- 3. A comprehensive order detail screen including the Grand Total is displayed: Click on **Proceed to Checkout**.

Note

The units of the SKUs can be altered on the order detail screen by changing the **Qty** field. On editing the quantity, the amount and total amount changes accordingly.

To know in more detail, connect to Subscription Status Change of the Customer Section.

- 4. In the next step, select any of the two options:
  - Existing Customer: The order has to be placed for an existing customer.
  - New Customer: New Customer has to be registered before placing the order.

- 5. Proceeding to the Payment Method, options available are credit and offline transfer.

  Pay From Credit section shows the available credit. In case of low credit, the seller has a choice of adding credit.

  To add credit:

  - Click on **Add Credit**.
  - Enter the total credit and available credit for the customer.
  - Enter Coupon code, if applicable and click on **Apply**.
  - Click on **Proceed to Payment**. The Order Summary is displayed. You can view the status of the current order as shown below:

Add order from List View

Navigate to **Orders > Add Order > List View**. The product details are listed in the form of a table.

List View allows you to perform the following:

Actions	Do this
Add Product one by one	Click **Add Product**. Refer **Add Products**.
Import product list	Go to Actions > Import. To learn on importing product list, refer **Import Product**.
Navigate to Catalog View	Click on Catalog View to view the products and create an order.
Edit Product information	Click on more options, icon and select **Edit** to change the product details.

Search Products

Search Products by Name, Publisher, Category, Billing Frequency, and MRP of the product.

View, Edit, & Cancel Order

You can view, edit and cancel the order.

View Order

To view an order:

- 1. Go to **Orders** and navigate to the order you would like to view.
- 2. Click on more option and select **View Order**.
- 3. The selected order details are displayed:

Edit Order

When an order is created, it is pending. It goes to complete state on approval by the seller. Here you can approve/cancel any orders that are in pending status.

To edit/approve an order

- 1. Go to **Orders** and navigate to the order you would like to edit.
- 2. Click on more option and select **Edit Order**.
- 3. The selected order details are displayed:
- 4. Click Cancel to delete the order or Approve to proceed. On approving the order, a confirmation message is displayed:
- 5. Click **Approve** for approving the record or click **Cancel**.

Note

1. On approval, you will see the order goes to **Complete** status which is viewed in the Order Summary screen.

2. When an order is in **Complete** status, the actions available on the order are the view and cancel.

Cancel Order

To delete an order:

- 1. Head to **Orders** and find the order you would like to edit.
- 2. Click on the more option icon, and select **Cancel Order**. A confirmation message is displayed:
- 3. Click on **Yes, cancel!** for deleting the order, else click **Cancel** to cancel the action. A success message is displayed on cancelling the order:

Note

1. Once an order is cancelled, it cannot be approved.

2. When an order goes to **Cancelled** status, you can only view the order.

Print, Download & E-mail

An order can be printed, downloaded, and e-mailed using the options present at the top-right of the order page.

Invoices

The Invoices page provides a list of all the invoices of all the customers at a glance. When an order is created, an invoice is generated automatically with unpaid status.

Here you can:

- 1. View Invoice Summary
- 2. View Invoice
- 3. Cancel Invoices

View Invoice Summary

Invoice Summary gives an overview of all the invoices generated for all the customers with their status. Status can be paid or unpaid.

To view Invoice Summary:

Go to Invoices. The **Invoice Summary** is displayed with all the invoices of all your customers.

The Invoice Summary lists the following:

- 1. Invoice No, Invoice Date, Customer who is the product owner.
- 2. Cost Price and the Amount
- 3. Receipt Number
- 4. Mode of payment
- 5. Invoice Status

View Invoice

To view an invoice:

- 1. Go to Invoices and navigate to the invoice you would like to view.
- 2. Select **View Invoice**, to view the generated invoice:

Cancel Invoice

To delete an invoice:

- 1. Go to Invoice and navigate to the invoice you would like to cancel.
- 2. Click on more option icon and select **Cancel Invoice**. A confirmation message is displayed:
- 3. Click on **Yes, cancel!** for deleting the invoice, else click **Cancel** to cancel the action. A success message is displayed on cancelling the invoice:

Storefront

Storefront allows you to:

- 1. Add Products to your Marketplace
- 2. Order Products from Catalog View
- 3. Set Pricing for the products
- 4. Generate Coupons or Promotions

Products Summary

- 1. Go to Storefront > Products.
- 2. The Product Summary page is displayed. This page lists all the products in your catalog.

The following actions can be done here

1. Add product
   - Add products individually
   - Import product list
- 2. Edit product
- 3. View catalog

Add Product

Products can be added from:

- 1. **Getting Started** and navigate to **Ready To Go Marketplace** and select **Add Product**
  2. Storefront
  This platform allows you to add products in two ways
  - 1. Add Products individually
  - 2. Import product list

Add Products individually

To add products individually:

- 1. Go to **Storefronts > Products > Add Product**. The Add Product page is displayed.
- 2. Fill in the details of the product. Refer Add Product for description.

- 3. Click **Save**. The product is listed successfully in the product list and in the catalog.

Note

The product added is reflected in the Product Banner of your portal.

Import Product

Alternative to adding products individually, the entire product list can also be imported.

To import product list:

- 1. Go to **Storefronts > Products > Actions > Import**.
- 2. Upload the products list
- 2. Map the columns:
- 4. Finally import to add the product list.

For a description of importing the product list, refer to Import Product.

Note

1. Product list can also be uploaded from the Add Products in the Getting Started Page

2. A sample excel file is provided to have an understanding of the format required for a successful upload.

Edit Product

To edit an individually added product:

- 1. Navigate to the product you want to edit.
- 2. Click more options to edit the product.
- 2. Select Edit. The product details page is displayed. Make the necessary changes.
- 4. Click Save to save all changes.

Note

You will be directed to the Product Summary after the product details are edited.

View Catalog

The product list can be viewed in the form of a catalog that lists the logo of the product and the essential details that help to make the purchasing decision. From this page, an item can also be ordered and placed in the cart for checkout.

To go to Catalog View:

- 1. Go to **Storefronts > Products > Catalog View**.
- 2. The Catalog View allows to:
  - 1. Enter the quantity you would opt for purchase.
  - 2. Select the term.
  - 2. Add product to the cart.
- 3. Once the product is added to the cart, the items are reflected in the cart icon, present at the upper right corner of the page.

Note

1. To learn more on ordering and checking out a product, connect to Orders.

2. Ordering a product can be performed in the following ways from:

- Land up page of your portal
- Marketplace: Getting Started and then select View Marketplace which is present as one of the links in the Ready To Go Marketplace.
- Orders Menu
- Catalog View (Storefront > Products > Catalog View)

Note

The list view can be navigated from the Catalog View. Click List View which is present at the upper right of the Catalog View.

Pricing

The price list contains the products with the cost price and the MRP. Here you can set the markup percentage, thereby generating the selling price of a specific product. The details on this page are inherited from the Add Product section.

To connect to Pricing, Go to **Storefront > Pricing**.

Here you can:

- 1. Set pricing
- 2. Edit pricing

Set Pricing

To set pricing for the products:

- 1. Go to **Storefronts > Pricing**. The Price List is displayed:
- 2. Here you can view the pricing details of all the products. This information is accumulated from the Add Product module. You can set the markup % and the selling price is displayed automatically.

Note

- 1. The markup % can also be fixed in the Add Product or the Edit Product sections.
- 2. Make sure the selling price is less than the MRP.

Edit Pricing

To edit the pricing list:

- 1. Go to **Storefronts > Pricing**. The Price List is displayed:
- 2. Click the more options icon to edit the pricing details.
- 3. Select **Edit**. The **Add Product** page is displayed with all the details entered.
- 4. Make the required changes.
- 5. Click **Save** to save the changes.
- 6. The changes made are shown in the product summary as well as on the pricing page.

Note

Make sure to enter all the mandatory fields before saving the pricing details. On clicking Save, the fields that have to be filled are highlighted.

Promotions

Promotions permit the user to generate coupons for specific products and apply when the item is ordered. These coupons are used to provide discounts or cashback and can be set as a percentage or as the amount in **Add Coupon** section.

To go to Promotions, select **Storefronts > Promotions**.

Below are the actions performed on this page.

- 1. View coupon summary
- 2. Add coupon
- 3. Edit coupon
- 4. Delete coupon
- 5. Change Status

View Coupon Summary

In this section, you can view the details of all the generated coupons. The promotions are listed in chronological order.

The following details are displayed:

- 1. Coupon name & code
- 2. Value
- 3. Product for which the coupon is applicable
- 4. Coupon validity date (start date-end date)
- 5. Customer for whom the coupon
- 6. Coupon status can be set as active or inactive

From this page, coupons can be added, edited, and deleted.

Add Coupon

To add a coupon for the selected products:

- 1. Go to Storefronts > Promotions > Add Coupon. The Add Coupon page is displayed:

2. Enter the following details:

Field	Description	Required
Coupon Name	Related name for the coupon	
Coupon Description	Brief the coupon usage	optional
Coupon Code	Click **Generate** The code is automatically provided.	Generated automatically
SKU / Product	Select one of the options: **By Product Category**: Lists the primary categories **By Product/ Plan Name**: Lists the products	
Coupon Type	Options available are: • 1. Discount • 2. Cashback Both these types can be specified as a percentage or as an amount	
Usage	• 1. Specifies if this coupon can be used as one coupon per purchase or unlimited times. If multiple time option is selected, enter the maximum number of times the coupon can be applied. • 2. Checkmark if the coupon is applied to a specific customer. If yes, select the customer from the dropdown.	
Other conditions	Checkmark if applicable for the following: • Can be applied only for the first transaction • Not applicable for the existing customers	Optional
Coupon Validity	Select one of the two options: • 1. The coupon start date and end date for validity • 2. No date range implies coupon is active always	
Coupon Status	• **Active**: On enabling the coupon for use. • **Inactive**: On disabling the coupon for use.	

- 3. Click Save. This adds the coupon to the Coupon Summary with the details entered.

Edit Coupon

To change the details of the added coupon:

- 1. Go to Storefronts > Promotions. The Coupon Summary is displayed:
- 3. Click the more options icon to edit the specific coupon details.
- 4. Select Edit. The Add Coupon page is displayed with the added information
- 5. Make the required changes.
- 6. Click **Save** to save the changes.
- 6. The changes made are shown in the product summary as well as on the pricing page.

Note

Make sure to enter all the mandatory fields before saving the coupon. On clicking Save, the fields that have to be filled are highlighted.

Delete Coupon

To delete the added coupon:

- 1. Go to **Storefronts > Promotions**. The Coupon Summary is displayed:
- 2. Click the more options icon to delete the specific coupon.
- 3. Select Delete. A confirmation message is displayed:
- 4. Click Yes for deleting the coupon else click Cancel for cancelling the action.
- 5. On clicking yes, a success message is displayed:

Change Status

The status of the coupon enables or disables the coupon application. The status change can also be initiated from the Coupon Summary page.

To change the status of the coupon:

- 1. Go to **Storefronts > Promotions**. The Coupon Summary is displayed:
- 2. Select **Active** for activation of the coupon else select **Inactive**.
- 3. On changing the status, a confirmation message is displayed:
- 4. Click on **Yes, update it** if you opt for a change of status else click on **Cancel**. On clicking **Yes**, a success message is displayed:

Support

All the customer issues are managed in this section. Support takes care of adding to resolving a ticket, assigning, moving and merging, and adding relevant departments. The overview of all the ticket statuses is also visible on this page.

- 1. Go to Support.
- 2. The summary of all the tickets is listed:

Here you can:

Add

Add tickets

View

View the ticket's summary

Reply

View ticket and reply

Add Department

Add a relevant department for resolving issue

Manage

Allocate assignee, merge tickets, move the tickets to a different department.

To know more on support, navigate to Tickets section.

Logs

Logs provide an insight into the activities or events recorded in the seller's portal.

This section helps to:

View Activity Logs

View Email Logs

Note

Follow the links above to learn on each action on the Logs module.

Settings

Configure all your settings required for successfully setting up a marketplace.

Settings menu is organized into:

- 1. **Store Settings**: set your theme, add hot categories, define email templates, add your company profile and agreement.
- 2. **Server Settings**: configure mail server, add domain and SSL certificate.
- 3. **Integrations**: integrate payment gateways, accounting tools
- 4. **Advanced Settings**: add custom fields, manage portal settings, users and roles

Store Settings

The Store Settings allows you to set the following categories:

- 1. Theme
- 2. Hot Categories
- 3. Email Templates
- 4. Taxation
- 5. Company Profile
- 6. Terms & Conditions

To access Store Settings:

Go to **Settings > Store Settings**

Theme

Here you can customize the theme of the portal as per your needs.

Note

You can also access Customize Theme from the Quick Links of Getting Started page as shown below:

To customize theme:

- 1. Go to **Settings > Store Settings > Theme**.
- 2. Click on Customize your Theme.

Hot Categories

The most popular & best-rated products, special deals and the latest products,, etc are featured in the seller's portal.

Hot Categories allows you to set deals, best sellers, new arrivals, popular & featured services in your portal.

To set Hot Categories:

Head to **Settings > Store Settings > Hot Categories**.

- 1. The Hot Categories page is displayed with all the options required to set.

Today's Deals

Today's Deals refers to products that are offered at its best price.

To set Today's Deals:

- 1. Go to **Settings > Store Settings > Hot Categories**.
- 2. Expand Today's Deal section
- 3. Checkmark the products you would like to add in Today's Deals.
- 4. Use chevron icon, to move the selected products .
- 5. The selected products are shifted to the Selected Products list and removed from the Select Products list.

Note

If you would like to remove the selected products, checkmark the specific items. Use to shift the items back to the **Select Products** list.

Best Seller

Best Seller features the best and the fast moving products.

To know how to add products under Best Sellers, refer **Today's deal**.

New Arrivals

New Arrivals lists the latest products. This gives an insight on the new products to the existing customers.

To learn how to add products under New Arrivals, refer **Today's deal**.

Popular Products

Here you can add the top-rated products that are popular.

To list the popular products, go to **Today's deal**.

Featured Services

Featured Services are products you would like to highlight on your portal.

To know on adding Featured Services, connect to **Today's deal**.

Email Templates

E-mail Templates allow you to:

- 1. Enable / disable all auto generated e-mails from a specific department.
- 2. Enable/ disable specific e-mails
- 3. Edit Template
- 4. Preview Template

Enable/ Disable E-mail

- 1. Go to **Settings > Store Settings > Email Templates**.
- 2. All the departments which are related to e-mail templates are listed.
- 3. You can enable/ disable all auto generated e-mails from a specific department.
  In case, you would like to disable e-mail from Accounts department, toggle it off. By default, the e-mail templates of all the departments are turned on.

Enable/ Disable specific e-mail

To enable/ disable specific e-mail form a particular department

- 1. Go to **Settings > Store Settings > Email Templates**
- 2. Click on the specific department, say Accounts. This directs to the Accounts e-mail templates.
- 3. Find the event you would like to disable.
- 4. Select disable.

Note

All the e-mails are enabled by default.

Edit Template

To edit an e-mail template:

- 1. Go to **Settings > Store Settings > Email Templates**.
- 2. Find the event you would like to edit the template for.
- 3. Click on more options and then select **Edit Template**.
- 4. The template is displayed in edit mode. Make the necessary changes.
- 5. Click on Save.

Preview Template

To preview an e-mail template:

- 1. Go to **Settings > Store Settings > Email Templates**.
- 2. Find the relevant department, whose e-mail template have to be previewed.
- 3. Click on the department, say Accounts. All the e-mail templates connected to Accounts department is displayed:
- 4. Find the event, you would like to preview the template for. for example: On Seller Registration
- 5. Click on more options and then select **Preview Template**. The template of On Seller Registration is displayed:

Company Profile

Company Profile refers to the seller's profile. This includes company's name, primary contact's personal details, demographic information, financial and billing details.

To enter your profile details, follow any one of the options:

- 1. Go to **Settings > Store Settings > Company's Profile**.
- 2. Getting Started and navigate to Ready to Go Marketplace links. Select Company Info.
  To know about Company Profile, refer **Company Info** of the Ready To Launch Marketplace.

Terms of USE

Terms of use specify the terms & conditions and the privacy policy that has to be published for the customer. The terms of use have to be read and acknowledged by the customer before the products are checked out.

In this module, you can publish the following contents:

- Terms & Conditions
- Privacy Policy

Terms & Conditions

To publish the terms and conditions:

- 1. Go to **Settings > Store Settings > Terms and Conditions**.
- 2. The **Terms Of Use** page is displayed:
- 3. Click on **Terms & Conditions**.
- 4. You can opt for one of the following to publish the agreement:
  - Enter the URL of the Terms & Conditions.
  - Upload the Terms & Conditions pdf file.
    For uploading, click on **Choose File** and select the agreement.
- 5. Click **Save**.

Privacy Policy

Privacy policy specifies how the seller collects and handles the data of the customers.

To add privacy policy:

- 1. Go to **Settings > Store Settings > Terms and Conditions**.
- 2. The **Terms Of Use** page is displayed:
- 3. Click on **Privacy Policy**.
- 4. You can opt for one of the following to publish the agreement:
  - Enter the URL of the Terms & Conditions.
  - Upload the Terms & Conditions pdf file.
    For uploading, click on Choose File and select the agreement.
- 5. Click **Save**.

Server Settings

Go to **Settings > Server Settings**

Server Settings allow you to:

- Configure the Mail Server

Configure Mail Server

To use the e-mail services, the seller must use a third-party SMTP service or can own one.

To setup email integration:

Navigate to **Settings > Server Settings > Mail Server (SMTP)**

Note

This functionality can also be accessed from Getting Started > Quick links > Mail Server (SMTP).

You can send e-mail using one of the following transfer methods:

- 1. API
- 2. SMTP

API

To connect using API, enter the API key generated from your SMTP portal.

Click Save

SMTP

To connect to SMTP

- 1. Go to **Settings > Server Settings**.
- 2. Select SMTP credentials.

3. Enter the following information:

Field	Description	Required
Host	SMTP Host Address	
Port	SMTP port number	
Username	SMTP credentials	
Password		
Type of Encryption	Options: (None, SSL, TLS)	

Note

SMTP credentials depends on the mail service you are using.

- 4. Click **Save**.

Integrations

Integrations enable other applications to integrate with your portal. It aids to connect data from various sources like:

- **Payment Gateways**: adds both online and offline payment gateways
- **Accounting Tools**: adds and configures accounting tools

Payment Gateways

Here you can integrate both online and offline payment modes for the transaction.

Go to **Settings > Integrations > Payment Gateways**

Note

Payment Gateways set up can also be initialized from Getting Started > Ready to Launch -Marketplace > Payment Setup.

To learn how to add an online payment gateway, refer **Online Payment** of the Customer's Section.

To set up an offline payment, refer **Offline Payment** of the Customer's section.

Accounting Tools

Accounting, billing, inventory and business books can be managed with tools like Tally & Quickbooks.

You can integrate and configure accounting tools here.

You can integrate and configure accounting tools here.

- 1. Go to **Settings > Integrations > Accounting Tools**
- 2. You must configure the tools to work with it. For example, click on quick books and click **Configure**.

Advanced Settings

Go to **Getting Started > Settings > Advanced**

Advanced Settings permit you to add fields in a specific section, customise notification scheduler, manage various settings, and set users and roles

The following can be performed in this module:

- 1. **Custom Fields**: add fields in a specific section
- 2. **Master Settings**: set various functionalities that applies to customers
- 3. **Users and Roles**: manage users and access permissions

Custom Fields

Use this screen to add field of your choice in a particular section.

To add fields:

- 1. Go to **Settings > Advanced Settings > Custom Fields** and then click on **Add Custom Fields**.
- 2. The Add Custom Field form is displayed:

3. Enter the details of the field to be added:

Field	Description	Required
Label Name	Name of the label you would like to add. Example: **Legal Trading Name** of the company field has to be included in the Customer Profile page. Here the label is **Legal Trading Name**.	
Show Under Module	Module name and the specific section where this label has to be listed. As per our case, we have to select **Customer > Profile**.	
Field Type	The various field types are listed. Choose the appropriate option. Here the field Legal Trading Name takes in **text** values.	
Is it Mandatory?	Checkmark if this field is mandatory else leave it unchecked.	

- 4. Click **Save**. The field added is listed in the Custom Fields page. Click on **Custom Fields**, at the top-right to navigate to the list.

Master Settings

Master settings are default settings to manage entire services handled in your portal. You can change these settings in this page.

Go to **Settings > Advanced Settings > Master Settings**

To know about Master Settings, refer **Settings** of Customer's section.

Users & Roles

Managing users and their permission to access sections of your portal is handled in this section. Multiple users can share one account.

In this page, you can:

- Add users
- Edit user profile
- Reset password

Add Users

To add users to an account:

- 1. Go to **Settings > Advanced Settings > Users & Roles**. Click on **Add User**.
- 2. The **Add User** form is displayed

3. Enter the following information:

Field	Description	Required
Company Name	Customer's Organisation	
User Name	Login User Name	
First Name/ Last Name	Primary User	
Role/ Department		
Email/ Mobile No	Primary Contact No	
Address		
Profile Image	Upload your profile image	Optional

- 4. Click **Save**

Note

To view the users and their roles, click **Users** present at the top-right of the screen. This action directs you to the list of added users with their allocated roles.

Edit User Profile

The assigned user's profile and roles can be edited.

To edit:

- 1. Go to **Settings > Advanced Settings > Users & Roles**.
- 2. Find the user whose details have to be edited. Click more options and select **Edit User**.
- 3. The user profile form is displayed in edit mode.
- 4. Make the necessary changes. Click **Save**.

Reset Password

Here you can reset the login password of a specific customer.

To reset password:

- 1. Go to **Settings > Advanced Settings > Users & Roles**.
- 2. Find the user whose password you would like to change. Click more options and select **Reset Password**.
- 3. A confirmation message is displayed
- 4. Click on **Yes**, to proceed