



Online Store Procedures

**Online Stores Module
Catalog Module**



Content

1. Introduction
2. Online Stores Module
3. Catalog Module
4. Inventory Module

Introduction

OrderStreamPro (OSP) provides a powerful platform for creating, operating and maintaining online stores.

There are four steps to setting up an Online Store:

- **Online Store Module.** This describes the steps to setting up an Online Store which includes:

Online Store Actions

-  Basic Settings
-  Contact Info
-  Store Catalog
-  Payment Settings
-  Shipping Settings
-  Store Image Gallery

- **Catalog Module.** Products are defined in a master catalog. Individual products may be offered for sale in more than one online store. Defining products includes:

Catalog Actions

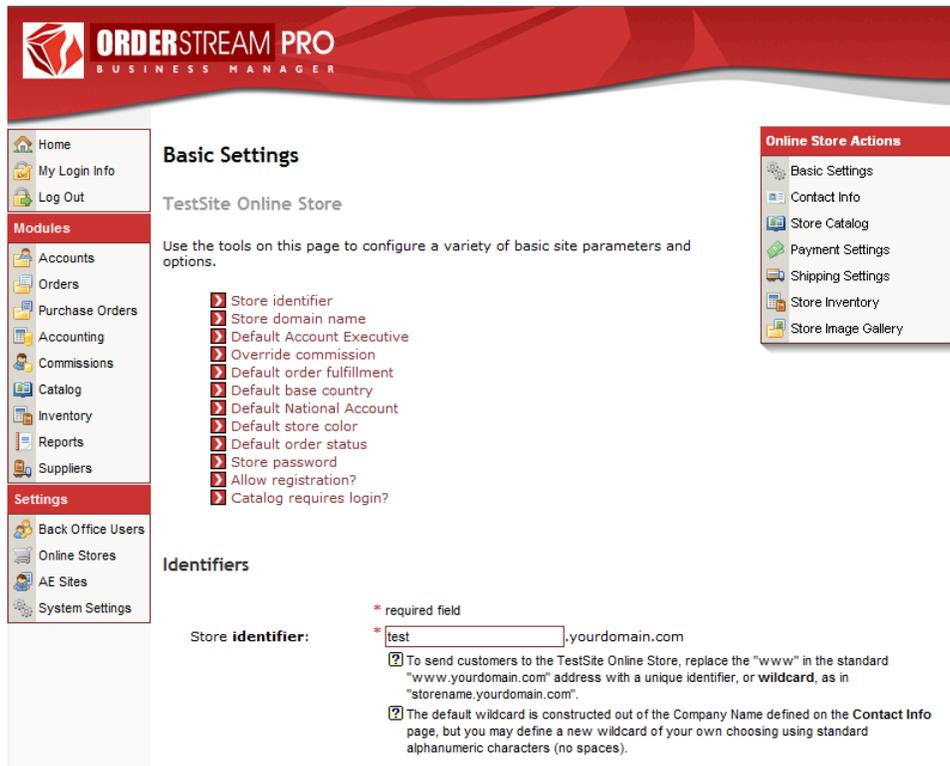
-  Product Description
-  Sizes / Colors / Options
-  Pricing Properties
-  Imprinting Properties
-  "Search" Properties
-  Inventory

- **Inventory Module.**

Each of these will be discussed in the sections below.

Online Stores Module

BASIC SETTINGS



Basic Settings

TestSite Online Store

Use the tools on this page to configure a variety of basic site parameters and options.

- ▶ Store identifier
- ▶ Store domain name
- ▶ Default Account Executive
- ▶ Override commission
- ▶ Default order fulfillment
- ▶ Default base country
- ▶ Default National Account
- ▶ Default store color
- ▶ Default order status
- ▶ Store password
- ▶ Allow registration?
- ▶ Catalog requires login?

Identifiers

Store **identifier**: .yourdomain.com

* required field

📖 To send customers to the TestSite Online Store, replace the "www" in the standard "www.yourdomain.com" address with a unique identifier, or **wildcard**, as in "storename.yourdomain.com".

📖 The default wildcard is constructed out of the Company Name defined on the **Contact Info** page, but you may define a new wildcard of your own choosing using standard alphanumeric characters (no spaces).

Setting up custom sites starts with the definition of site basics. As indicated above the basics consist of the following:

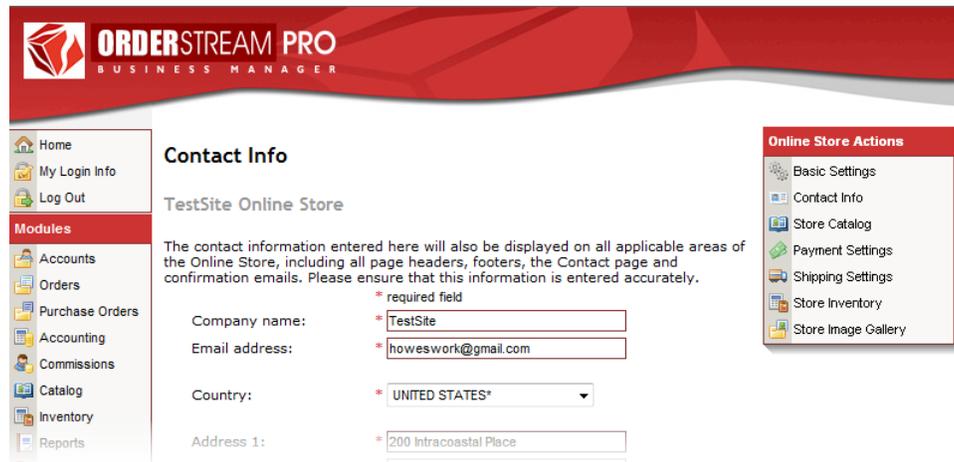
- **Side Identifier:** every store must have a unique identifier, or name. Once you've defined a name and a public storefront has been published for you, you can always link to your store via `http://[your site ID].orderstreampro.com`.
- **Site Domain Name:** You may also use your own self-supplied domain name to lead customers to your store.
- **Site Status:** Determine whether a site is to be active or inactive. Sites are never deleted as that would negatively impact historical reporting.



- **National Account:** if national accounts have been established (under “Define Lists”), select the one that applies for this Online Store.
- **Default Account Executive:** All accounts created by end customers need to be assigned to an AE. Select one AE from the list of existing account executives to determine who the default AE should be.
- **Override Commission Rules:** if the commission calculation rules are different for the online store from regular sales, such rules can be defined here. Commission rate is a percentage of gross margin. Minimum Corporate Revenue allocates a fixed percentage of revenue to the company with the remainder going to the Account Executive. Minimum Commissionable Revenue defines the limit below which no commissions are paid.
- **Default Order Fulfillment:** here you define whether orders are drop shipped or fulfilled from either a customer owned or distributor owned inventory.
- **Define Site Color:** rarely used, since most stores are custom designed at the storefront level.
- **Security Profile:** there are several access restrictions that can be set:
 - **Default Order Status:** determines whether orders are fulfilled automatically or whether specific approval is required before fulfillment. If approval is required, an email requesting approval is automatically emailed to the individual identified as the approver (defined in Online Store contacts).
 - **Site Password:** can be defined so that only individuals who have been given that password can access the site.
 - **Allow Registration:** determines whether individuals accessing the sites can register themselves or whether the Online Store administrator is required to register authorized users themselves (as may be the case for dealer networks).
 - **Catalog Requires Login:** determines whether individuals can view the catalog before login or whether login is required before access to the catalog. When used together with the Allow Registration function, it can carefully limit access to authorized individuals.

Be sure to save entries made on this (or any other) page before proceeding.

CONTACT INFO



The screenshot shows the 'Contact Info' page in the ORDERSTREAM PRO Business Manager interface. The page title is 'TestSite Online Store'. A warning message states: 'The contact information entered here will also be displayed on all applicable areas of the Online Store, including all page headers, footers, the Contact page and confirmation emails. Please ensure that this information is entered accurately.' Below this, there are four required fields: 'Company name' (TestSite), 'Email address' (howeswork@gmail.com), 'Country' (UNITED STATES*), and 'Address 1' (200 Intracoastal Place). A sidebar on the left lists navigation options like Home, My Login Info, Log Out, and various Modules. A sidebar on the right lists 'Online Store Actions' such as Basic Settings, Contact Info, Store Catalog, Payment Settings, Shipping Settings, Store Inventory, and Store Image Gallery.

Please note that site contact information is displayed on the site and therefore needs to be the individual or group that needs to be contacted by site users when there are issues.

In addition to contact information, this page is used to identify additional email addresses who should receive automatic notification of new incoming orders. Finally, if approval is required before fulfillment, the person to receive approval emails needs to be identified here.

STORE CATALOG

- **Catalog Name:** The first step is to define the name of the catalog that is displayed on the Online Store. If this is left blank it will display the company name defined in site contacts.
- **Multiple Product Ordering:** If the catalog offers printed materials or long list of items that do not have color and size options (or only one) then the Multiple Product Ordering option should be activated.

Define Primary and Secondary Categories: it's easier to find products if they are placed in appropriate primary and secondary categories. These can be defined here. Secondary categories are unique to one primary category. Typically, each secondary category should have at least four or five products in them.

If you define only one secondary category under a primary category, OSP will know to skip directly to the product level whenever a customer selects that primary category.

Define product offerings

NOTE: Select an existing **secondary** category from the list box above to add or remove **products** to or from it.

Select a **vendor**: (none specified) ▼

Select a product **type**: -select a product type- ▼ (optional)

Select a **purpose**: -select a product purpose- ▼ (optional)

Products **not yet added** * to the selected secondary category:

- "AA" Mini Mag-Lite® Flashlite
- "Benefits of Generic Medications" Stuffers
- 10 TO MIDNIGHT - DVD (Rated R)
- 100% Cotton T-Shirt 6.1 oz. White or Neutral
- 100% Cotton T-Shirt 6.1 oz: Colors
- 12 Pack Deluxe Cooler

of this vendor's products
 selected product(s) to the selected secondary category
 selected product(s) from the selected secondary category

Products **already added** to the selected secondary category:

- Test Product 1
- TestProduct2

NOTE: Select an **already added product** in the list box above to **override** this product's default price or minimum quantity for this Online Store.

Override the selected product's default properties:

Online Store's **minimum quantity**:

Master catalog's **default price** (non-editable): \$

Mark-up / -down (relative to master catalog's default price): %

Online Store price (calculated on the basis of mark-up): \$

If you would like to apply the mark-up specified above to **ALL** products in this custom catalog **globally**, click the **Apply to All** button. (Don't forget to **save your changes** when you are done.)

NOTE: this operation will overwrite **ALL** existing price data for this custom catalog. You may still edit mark-ups individually later.

Define Product Offerings allows the user to assign products to a specific secondary category of your Online Store catalog. Individual products may

also be assigned to one or more Online Store catalogs via the Catalog Module, described in the following section (Section 3).

The first step is to select the primary category you want to add products to, and then the secondary category. The second step is to select the vendor whose products you want to add.

The selection of product type and purpose can be ignored at this point. All products defined in the master product catalog from the vendor selected will be displayed. Products to be assigned can be highlighted and “added” to the catalog. They will then display in the “products already added” box together with other products already “added” to the selected secondary category.

If you want to apply a different **minimum quantity** than the quantity defined in the master catalog, you can do that here.

The **price** of the item can also be marked up or down relative to the base price defined in the master catalog.

PAYMENT SETTINGS

The payment profile describes a number of options relevant to customer payment for products ordered online.

Sales Tax allows the Online Store administrator to select states and provinces where sales tax needs to be paid. If OSP is integrated with Sales Tax Online, taxes are automatically calculated for online purchases based on the zip / postal code of the customer.

OSP is directly integrated with Sales Tax Online (<http://tax.cchgroup.com/sales-tax-rules/default>) for the automatic calculation of sales tax in all states and provinces in the US and Canada. Sales Tax Online is an optional service offered by CCH, and includes detailed sales tax reporting. If you choose to set up a Sales Tax Online account, please let us know your **serial number** (e.g. "1A23-1234-ABCD-1234") and we will connect your account immediately.

Credit Limits may be set when setting up an individual customer records. If those credit limits apply to online purchases this should be indicated here.

The suggested **Retail Price** for an item, if defined in the master catalog, can be displayed online if so desired. This typically applies more for wholesale sites.

Payment Methods

There are five payment methods:

- a. **Credit Card** using VeriSign (owned by PayPal) to process the credit card charge. If credit cards are to be used on a site than a **Merchant Account** needs to be set up with a relevant financial institution and the details entered below.

OSP is directly integrated with the Payflow Link online payment gateway (https://www.paypal.com/ca/cgi-bin/webscr?cmd=_payflow-link-overview-outside) for the secure processing of credit card authorizations. Payflow Link is an optional service offered by PayPal. Payflow Link is compatible with an array of merchant banks. If you would like to operate an online OSP store and accept secure credit card payments during checkout, please create a Payflow Link account at PayPal and let us know your Vendor ID and Partner ID.

- b. **Open Account** means that invoices will be sent to the purchaser for purchases made online. Credit limits may apply for Open accounts.
- c. **Gift Certificates** are a popular payment method in some programs. The system enables you to issue gift certificates to potential customers. Each gift certificate has a unique numeric code and a specified monetary value. Multiple gift certificates can be used for the purchase of a single item, and multiple gift certificate numbers may be added to the system via a single batch file.
- d. **Point Redemption Program** is similar to frequent flier programs. A dollar value must be set for the number of points to be allocated to the purchaser for purchases made on this site only. The number of points accumulated is stored by customer, and deducted as expended on purchases.

- e. **Discount Coupons** are popular and effective ways to stimulate sales. Discount coupons have a unique code and a specified dollar or percentage value (e.g. either \$10 off or 10% off). Coupons should have an expiration date after which they are no longer valid.

SHIPPING SETTINGS

Shipping Profile should almost always be custom.

When a custom Shipping Profile is shown, there are two options:

Enable Live Estimates enables online estimates of shipping costs via UPS methods. Estimates are based on standard rates using the weight of the items purchased and the zip / postal code of origin and the destination. The estimated shipping cost is included in the price of the online order. The actual shipping cost is typically somewhat lower than the estimates, thereby providing a small margin of profit on shipping charges.

Let Customers enter Their Own Shipping Accounts is a feature used by corporate stores when the corporation wants to pay for freight directly to the freight company.

As an alternative to live shipping costs estimates there is an option to enter a **Flat Shipping** charge and/or a **Flat Handling Charge**. The flat shipping charge makes sense if the items being sold are fairly uniform and the quantity sold is consistent. A flat handling charge can help defray fulfillment costs for all orders.

Warehouse Location is defined in terms of the zip / postal code of the warehouse location. Required to provide live shipping estimates with a point of origin.

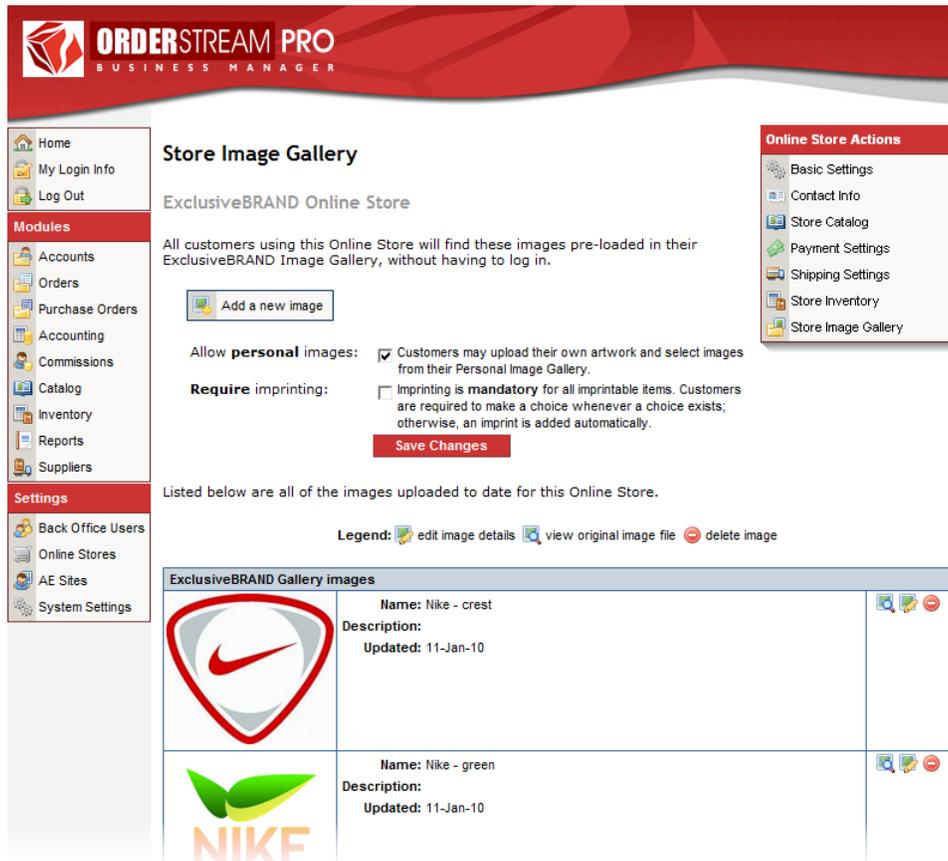
Rate Chart refers to various UPS rate charts that may be used for live estimates.

Available Shipping Methods enables the Online Store administrator to select those shipping methods to be made available to online store users. The classic shipping methods recommended for use are:

- UPS Ground
- UPS Second Day Air
- UPS Next Day Air

STORE IMAGE GALLERY

This module is used to give Online Store users the option to choose pre-defined artwork to decorate their purchases with, or to ensure that all purchases through this store should be decorated with pre-defined artwork automatically.



Store Image Gallery

ExclusiveBRAND Online Store

All customers using this Online Store will find these images pre-loaded in their ExclusiveBRAND Image Gallery, without having to log in.

[Add a new image](#)

Allow **personal** images: Customers may upload their own artwork and select images from their Personal Image Gallery.

Require imprinting: Imprinting is **mandatory** for all imprintable items. Customers are required to make a choice whenever a choice exists; otherwise, an imprint is added automatically.

[Save Changes](#)

Listed below are all of the images uploaded to date for this Online Store.

Legend: edit image details view original image file delete image

ExclusiveBRAND Gallery images	
	<p>Name: Nike - crest</p> <p>Description:</p> <p>Updated: 11-Jan-10</p>
	<p>Name: Nike - green</p> <p>Description:</p> <p>Updated: 11-Jan-10</p>

Add a new image allows you to upload new images to the shared store-wide gallery from your computer.

Nickname or short name.

Short Description a brief description that identifies the image and perhaps describes its use.

Image Availability defines whether an image can be selected for all product categories or just for a specific category. This provides a lot of



flexibility to define what images can be used where. Please remember that allowable image locations are defined in the product catalog.

Colors specific PMS colors to be used in the decoration (embroidery, silk screening, etc.) can be defined here.

Upload Original Artwork allows the user to upload a specific graphic file from the hard drive to OSP.

File Information is a field where information about the graphic file can be entered. This information would be passed on to the decorator if needed.

Additional Text can be downloaded or entered if additional text is required to be added to the item being purchased. This could be the name of a person, department, etc.

Notes and Special Instructions is a field that may be used to provide additional notes and instructions needed to clarify issues involved in the decoration of an item.

Catalog Module

Defining products currently involves four steps as follows:

-  Product Description
-  Sizes / Colors / Options
-  Pricing Properties
-  Imprinting Properties

Product Description

To define products, first click on “Catalog” on the main menu. (If you do not see that option it may be that you do not have access to the catalog module. Please contact your system administrator.)

Next, click on “Create a Product”. The screen displayed on the following page starts the product description process.

The following data elements can be defined. Please note that not all data elements are required fields.

Catalog Number: This number is user defined. It is recommended that an intelligent code be set up for defining products. It is best that the first two or three letters identify the organization for which the catalog is being created.

Product Name: A concise name for the product. Do not make it too long.

Product Status: used to indicate whether a product is active or inactive. Never delete a product once defined. It is essential for historical reporting purposes.

Vendor: select the vendor that is supplying the product from a list of vendors previously defined to OSP.

Vendor SKU Number: the number used by the **vendor** to identify the product. Required for accurate transmissions to OrderTrax².



« Back to List
« Previous Product
Next Product »

Catalog Actions

- Product Description
- Sizes / Colors / Options
- Pricing Properties
- Imprinting Properties
- "Search" Properties
- Inventory

- Home
- My Login Info
- Log Out
- Modules**
- Accounts
- Orders
- Purchase Orders
- Accounting
- Commissions
- Catalog
- Inventory
- Reports
- Suppliers
- Settings**
- Back Office Users
- Online Stores
- AE Sites
- System Settings

Product Description

Notebook and Pen Combo

Please use the fields below to describe this product. Most of the information you enter on this page will be visible to the customer in the public catalog.

Catalog number: * required field
=ATTC100193

Product name: * Notebook and Pen Combo

Product status: * active inactive
 Inactive products may not be selected for any new order, but existing orders for this product are preserved intact.

Business Group: * BDA INC

Vendor: * Spector Image
 If the desired vendor is not on the list, it must be added.

Vendor / SKU number: ST27

Product type: Desk / Office Accessories

Approval code: 404R

UNSPSC code:

Units of measurement: * EA (each)

Product weight: 0.00 ounces (for shipping charge calculations)

Country of origin:

Est. delivery time: if imprinted: 0 days if not imprinted: 0 days

Preview image:

 Upload a new **preview** image (must be in JPEG format and exactly **80 pixels** wide):

Preview description:

 Upload a new **full-sized** image (must be in JPEG format and exactly **250 pixels** wide):
 Optionally, upload up to 2 more **alternate** product images (must be in JPEG format and exactly **250 pixels** wide):

Product Type: product type refers to the product classification system used by ASI. It is used to report on annual sales by product type, which is information shared with others in the industry.

Approval Code: Not required and not validated; sometimes used for reporting purposes.



UNSPSC Code: A globally used classification hierarchy for products and services developed by the United Nations. Some corporations require this information for their own reporting purposes.

Unit of Measurement: Select one of the many possible units of measurement that can be used. The system allows virtually any unit of measurement. The system assumes that the pricing is always in terms of the unit of measurement selected.

Product Weight: Expressed in ounces, this is used to by UPS to estimate shipping charges.

Country of Origin: This is important for customs purposes when sending goods outside of the country.

Estimated Delivery Time: This should reflect the time it takes to receive additional product from the vendor. This is important for setting inventory levels.

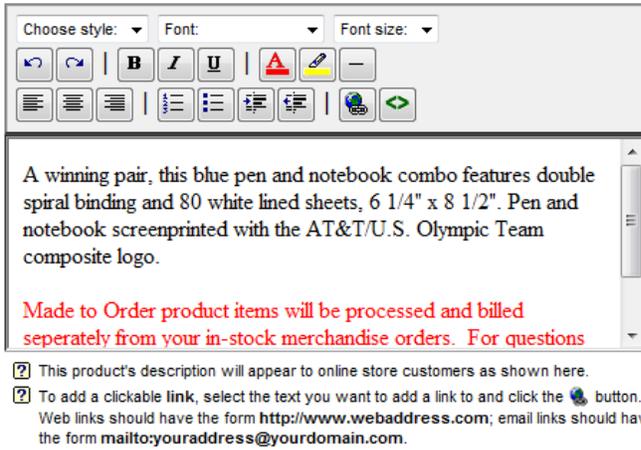
Preview Image: Upload a new preview image (must be in JPEG or GIF format and exactly 80 pixels wide).

Preview Description: A short description of the product to be shown on the preview pages.

Full Sized Image: Upload a full-sized image (must be in JPEG format and exactly 250 pixels wide). Optionally, upload up to 2 more alternate product images (must be in JPEG format and exactly 250 pixels wide). These may offer back and side views.

Enlarged Image: The ideal size for an enlarged product image is 500 pixels x 500 pixels. If larger, users will have the option to scroll the image and / or resize the viewing window.

Detailed description:



A winning pair, this blue pen and notebook combo features double spiral binding and 80 white lined sheets, 6 1/4" x 8 1/2". Pen and notebook screenprinted with the AT&T/U.S. Olympic Team composite logo.

Made to Order product items will be processed and billed separately from your in-stock merchandise orders. For questions

 This product's description will appear to online store customers as shown here.

 To add a clickable link, select the text you want to add a link to and click the  button. Web links should have the form <http://www.webaddress.com>; email links should have the form <mailto:youraddress@yourdomain.com>.

Save Changes

Cancel

Detailed Description: this is a vital field because it contains the main, full description of the product. Use of fonts, colors, underling, highlighting, bolding and even external links can improve the presentation of the description.

Make sure to click on “Save Changes and Next”.

SIZES / COLORS / OPTIONS

The second page in the product definition process consists of defining sizes, colors and other options.

The screenshot shows the 'Sizes / Colors / Options' configuration page for a product named 'Notebook and Pen Combo'. The page includes a navigation sidebar on the left with sections for 'Home', 'Modules', and 'Settings'. The main content area has a title 'Sizes / Colors / Options' and a breadcrumb trail: « Back to List » < Previous Product > Next Product >. A 'Catalog Actions' menu is visible on the right, listing options like Product Description, Sizes / Colors / Options, Pricing Properties, etc. The configuration section contains two main parts: 'Size heading' and 'Color heading'. The 'Size heading' section has a radio button selected for 'Size' and a text input field. Below it, a checkbox is checked with the text: 'The heading defined here will appear as the heading of the Size column on this product's public Product Details page.' The 'Sizes available' section features a table with one row containing 'NA' and buttons for 'Add »', « Delete', 'Move Up', and 'Move Dn'. Below the table is a section for 'Assign a Size Surcharge to the selected size:' with an 'Assign' button. A 'Show Size Help Notes' button is also present. The 'Color heading' section has a radio button selected for 'Color' and a text input field. Below it, a checkbox is checked with the text: 'The heading defined here will appear as the heading of the Color column on this product's public Product Details page.' The 'Colors available' section includes a list of pre-defined colors (e.g., '001 - BLACK / GREY', '001 - BLACK / GREY / ORANGE') and a 'Selected colors' field containing 'Blue'.

Please note that there is a button to show additional help notes.

Size Heading: OSP allows you to use the usual “size” heading for something else if size is not a concept used for the product. For example, for children’s toys the size heading could be used for school grade / level.

Sizes Available: various sizes that apply to the product need to be defined here. If another heading is used such as grades or school levels they need to be defined the same way.

Color heading: "Color"

The heading defined here will appear as the heading of the Color column on this product's public Product Details page.

Colors available:

Add a pre-defined color:

001 - BLACK / GREY	▲
001 - BLACK / GREY / ORANGE	☰
001 - BLACK / GREY / ORANGE (F	
001 - Black / Sterling	
001 - STEEL / CLEAR WITH SILVER	
002 - FADE SILVER / GREY WITH I	▼

Or add a new color:

Color:

Hexidecimal code:

Packaging options:

Assign a price to the selected packaging option: \$

Please note that there are buttons to show additional help notes.

Color Heading: The color heading, as with the size heading, can be used to define other characteristics (e.g. gender, etc.).

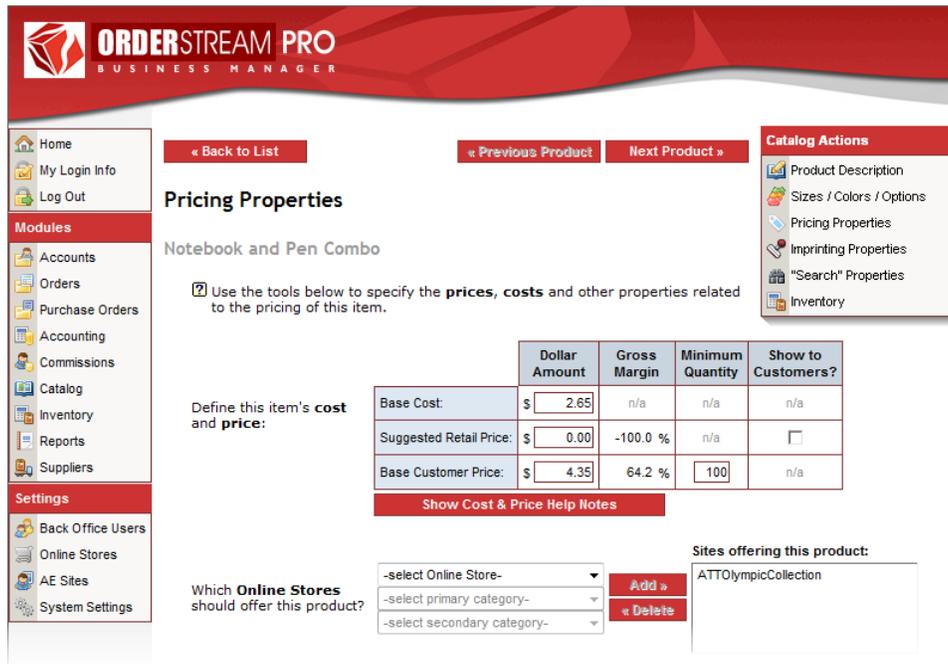
Colors are given a name and a Hexadecimal code so that the colors may be displayed with the product in the catalog. Adobe ImageReady and Photoshop have an eyedropper tool that lets you pick a color from a pixel in an image, and then shows you the code for that color in a number of formats, including hexadecimal and RGB. There are also free tools on the web that our designers love like <http://instant-eyedropper.com> or <http://www.tucows.com/preview/194554> (Google “free hexadecimal color picker” for more options).

Packaging Options: various packaging options may be defined, such as “gift wrap”. For each packaging option a cost can be associated which is added in when customers orders the product.

PRICING OPTIONS

Base Cost: the cost of the item when purchased from the vendor. This is used in reporting on gross margin for sales.

Suggested Retail Price: this is the price that may apply in other venues. You have the option of displaying a suggested retail price or not.



The screenshot shows the 'Pricing Properties' screen for a product named 'Notebook and Pen Combo'. The interface includes a left sidebar with navigation options like Home, My Login Info, Log Out, and various Modules (Accounts, Orders, Purchase Orders, Accounting, Commissions, Catalog, Inventory, Reports, Suppliers). A 'Settings' section includes Back Office Users, Online Stores, AE Sites, and System Settings. The main content area features navigation buttons for 'Back to List', 'Previous Product', and 'Next Product', along with a 'Catalog Actions' menu containing options like Product Description, Sizes / Colors / Options, Pricing Properties, Inprinting Properties, 'Search' Properties, and Inventory. The 'Pricing Properties' section includes a checkbox to 'Use the tools below to specify the prices, costs and other properties related to the pricing of this item.' Below this is a table for defining costs and prices:

	Dollar Amount	Gross Margin	Minimum Quantity	Show to Customers?
Base Cost:	\$ 2.65	n/a	n/a	n/a
Suggested Retail Price:	\$ 0.00	-100.0 %	n/a	<input type="checkbox"/>
Base Customer Price:	\$ 4.35	64.2 %	100	n/a

Below the table is a 'Show Cost & Price Help Notes' button. At the bottom, there is a section for 'Which Online Stores should offer this product?' with dropdown menus for '-select Online Store-', '-select primary category-', and '-select secondary category-'. To the right, there is a list of 'Sites offering this product:' with 'ATTOLympicCollection' listed and 'Add' and 'Delete' buttons.

Base Customer Price: this is the price to be paid by the customer before sales tax, packaging costs, handling and freight.

Online Stores: Here the Online Stores that will be offering this product can be selected from available sites. In addition, the primary and secondary category for products in the catalog can be assigned. The primary and secondary categories determine the positioning of product in your catalog. The categories themselves are set up in the "Online Stores" module.

There are two ways to assign products to specific Online Store catalogs. Via the Catalog module you may assign products one by one to an Online Store. The alternative method is to assign products en masse via the Online Store module, using the "Store Catalog" screen described in Section 4 of this manual.

Taxable: all products are taxable by default, but if it isn't, it should be marked as such here.

Samples: If a product can be sold as a sample it can be marked as such here. Samples can be sold in quantities of 1 independently of the defined minimum quantity.

Size Price Breaks: sometimes larger sizes cost more. These up-charges can be defined here, specific to individual sizes.

Price break **help** notes: Show Price Break Help Notes

Size price breaks: add surcharge to base cost as an increment, or a percentage

Surcharge (\$ or %): Add »
Enter "\$x.xx" if an increment; "x%" if a percentage. « Delete

Quantity price breaks: subtract discount from base cost as an increment, or a percentage

Minimum Quantity: Add »
Discount (\$ or %): « Delete
Enter both the minimum quantity ("xxx") at which each price breaks, and the amount ("\$x.xx" or "x%") of the corresponding discount.

Save Changes Cancel

Quantity Price Breaks: where applicable, quantity price breaks can be defined here. For example, for quantities in excess of a certain number, a fixed or percentage amount may be deducted from the price per unit. There can be multiple price breaks.

IMPRINTING PROPERTIES

For items to be imprinted the following needs to be defined. Typically, this applies more to wholesale operations rather than retail.

Image Location: you may define multiple locations where imprinting is allowed, such as left chest, upper back, etc. One of three types of imprinting may to be selected: embroidery, silk screening or general imprinting.

Imprinting Set Up Fee: enter applicable set-up fee for the item.

Wave Set Up Fee: the set-up fee can be waived when a specific number is ordered.

Embroidery Price Breaks: price breaks for various quantities to be embroidered may be set.

General Imprinting Price Breaks: price breaks for various quantities to be imprinted may be set.

SEARCH PROPERTIES

Search properties are currently under development.

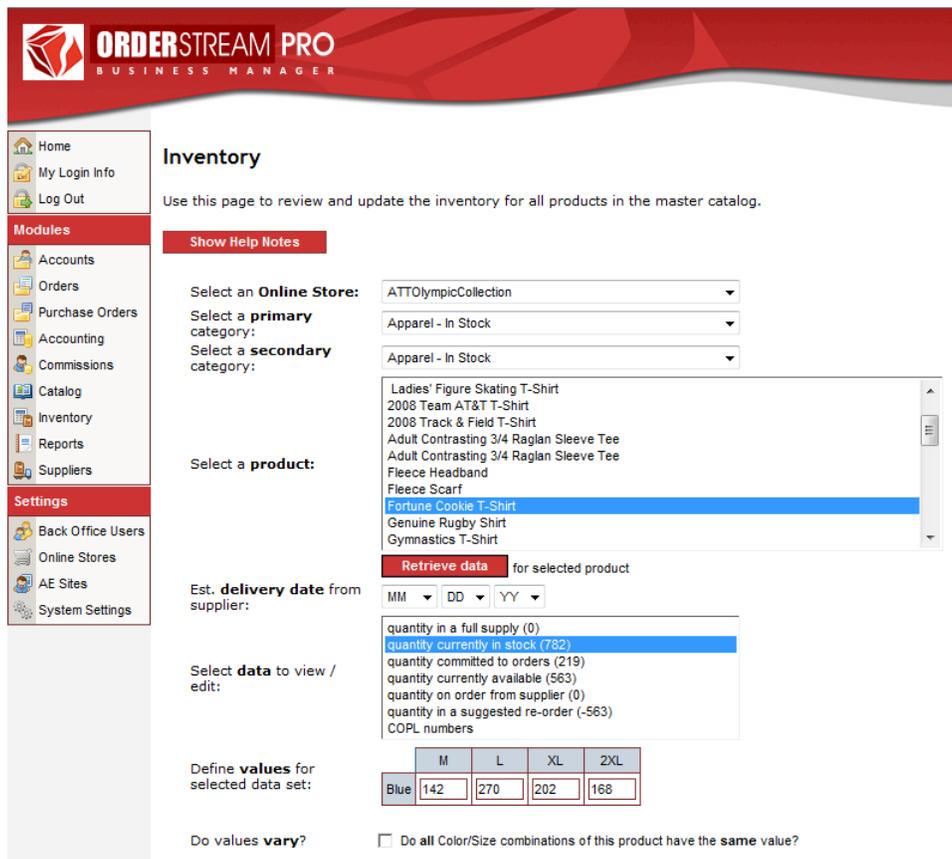
INVENTORY

Inventory in general is described in the following section.

Inventory

OSP provides a facility to manage inventory for online stores.

Inventory may be managed on either a product-by-product basis via the Catalog Module, or on a system-wide basis via the Inventory option in OSP's main menu.



The screenshot shows the 'Inventory' page in the ORDERSTREAM PRO software. On the left is a navigation menu with sections for 'Home', 'Modules', and 'Settings'. The 'Inventory' module is selected. The main content area is titled 'Inventory' and includes a 'Show Help Notes' button. Below this are several form fields: 'Select an Online Store:' (dropdown menu), 'Select a primary category:' (dropdown menu), and 'Select a secondary category:' (dropdown menu). A 'Select a product:' dropdown menu is open, showing a list of items with 'Fortune Cookie T-Shirt' selected. Below the product list is a 'Retrieve data' button. Underneath, there are date pickers for 'Est. delivery date from supplier:' and a list of data fields to view/edit, with 'quantity currently in stock (782)' selected. At the bottom, there is a table for defining values for selected data sets, showing values for sizes M, L, XL, and 2XL for the color 'Blue'.

	M	L	XL	2XL
Blue	142	270	202	168

In order for a product to be eligible for inventory management, that product must be assigned to a warehouse. Warehouse records, in turn, may be created in the Suppliers module.

The following items need to be defined to manage inventory:

Quantity In A Full Supply represents the ideal inventory level for an item. This should be based on an analysis of sales and minimum economic order quantities.

Quantity Currently In Stock is the number of items left in a supply. OSP automatically recalculates this number as you invoice customer orders and create new orders to replenish stock.

Quantity Committed To Orders is the number of items for which orders have been received but which have not yet been invoiced. This number is automatically calculated and adjusted by the system.

Quantity Currently Available is the number of items in stock less the number of item committed to orders received.

Quantity On Order From Supplier is the number of items on order, calculated on the basis of orders entered in the back office to replenish inventory.

Quantity In A Suggested Re-Order is the number of items that should be re-ordered, calculated as the difference between the quantity in a full supply and the quantity currently available.

The inventory numbers are fully online and are updated as orders are entered and processed. For example, when the status of an order is changed from “in process” to “invoiced”, the quantity currently available is decreased and the quantity in a suggested re-order is increased.

OSP also provides a variety of inventory reports to help manage inventory and to report on product movement.