Stock in the Channel

Settings & Configurations Guide

Modern Selling How-To Guides

Intro

This Guide should be reviewed before starting any other Modules in the SINCH How-To Guide Series and should be referred to as you use the platform.

There are ? Tooltips throughout the Stock In The Channel platform to assist you, in most cases these are self-explanatory, but there are some unique SINCH terms that are explained throughout the Guide Series.

If you find yourself lost while using the SINCH platform, head back to the My Account dashboard. Most actions are available here or use the My Toolset menu in the top left corner.

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SINCH How-To Guides

Module 1: Getting Started with SINCH

Module 2: Creating Accounts & Contacts

Module 3: Working with Customer Groups

Module 4: Using the Quote Tool

Module 5: Completing Purchase Orders

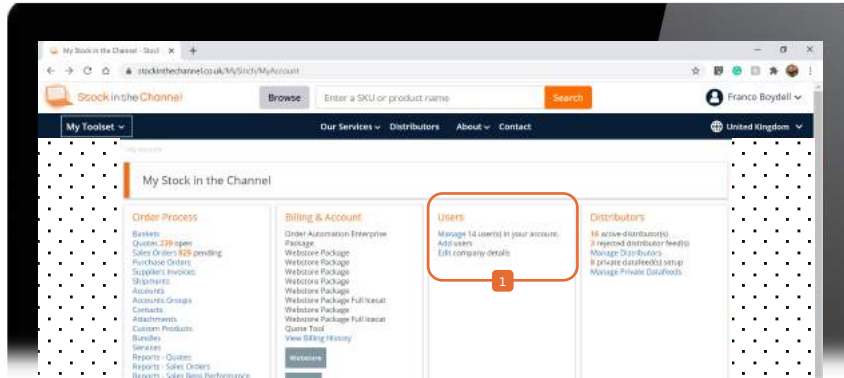Module 6: Working With Magento Modules

Settings & Configurations Guide

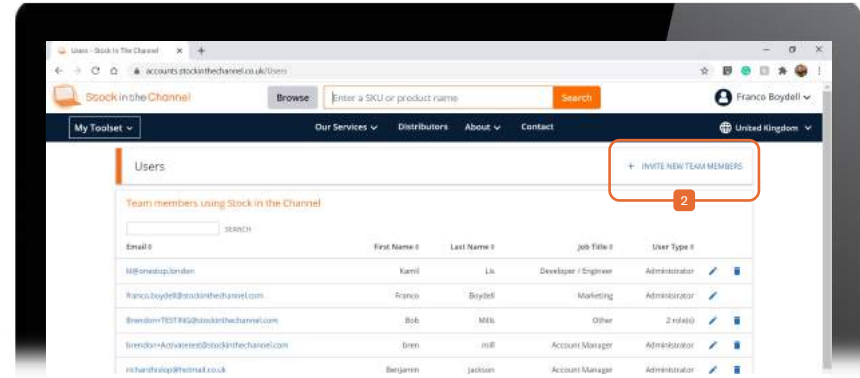Stock in the Channel

Part 1:
User Details & Permissions

Step 1

1 Starting on the My Account dashboard, select **Manage User**.

Here you'll have visibility of all Users currently associated with your Account.

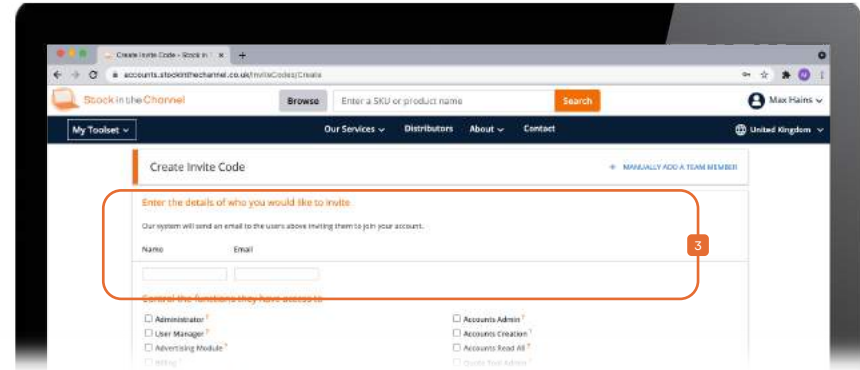**2** Click INVITE NEW TEAM MEMBERS to add additional users.

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Step 2
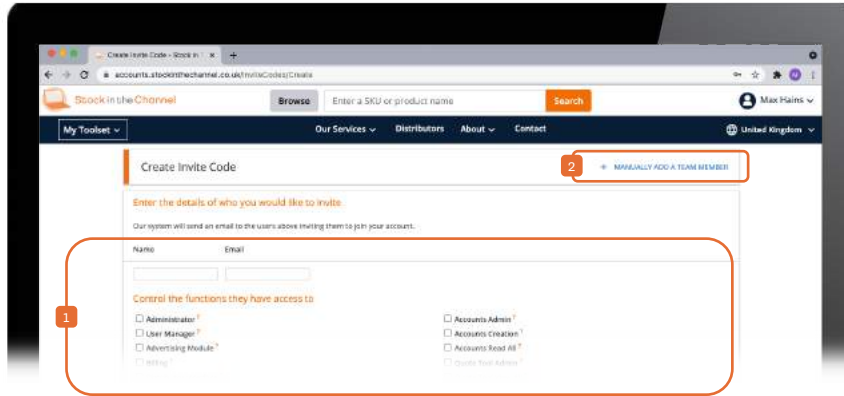
1. Here you can invite a team member to join with pre-selected User Permissions - but enabling them to complete their profile and set their password.

   Use the ? Tooltips to explore functions in detail.
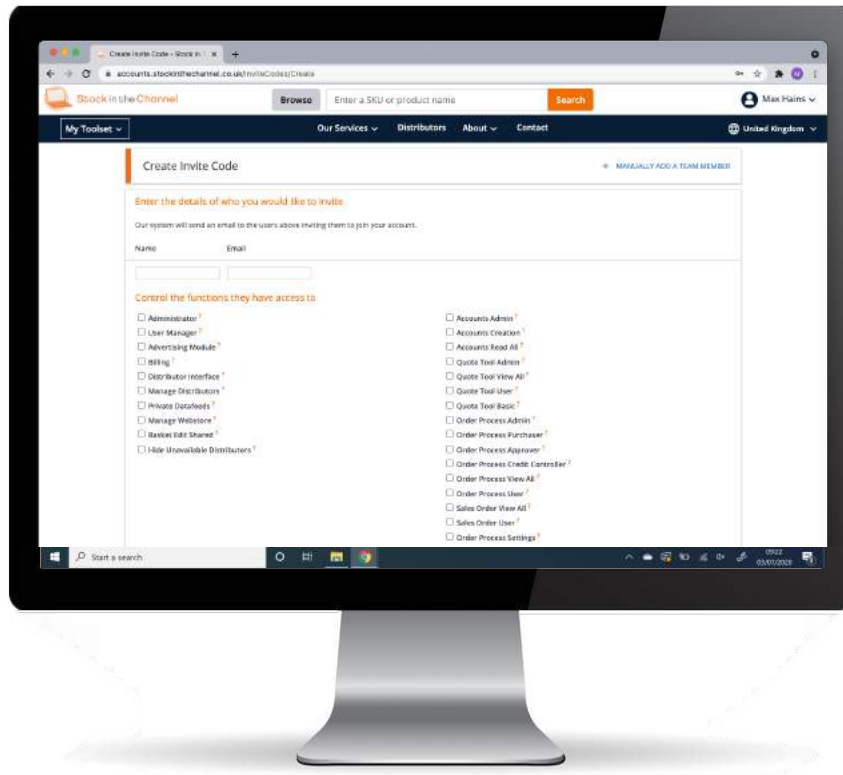
2. Or MANUALLY ADD A TEAM MEMBER.

3. Add the new team members details.

   NB. You will only see Permissions relevant to the service you are subscribed to.

   Set Permissions depending on the User's role.

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Step 3a

When you invite a new user, you assign them with various permissions.

Details of each user permissions can be found by hovering over the ❓ symbol.

User permissions can be assigned based on the roles of your team members that use Stock in the Channel.
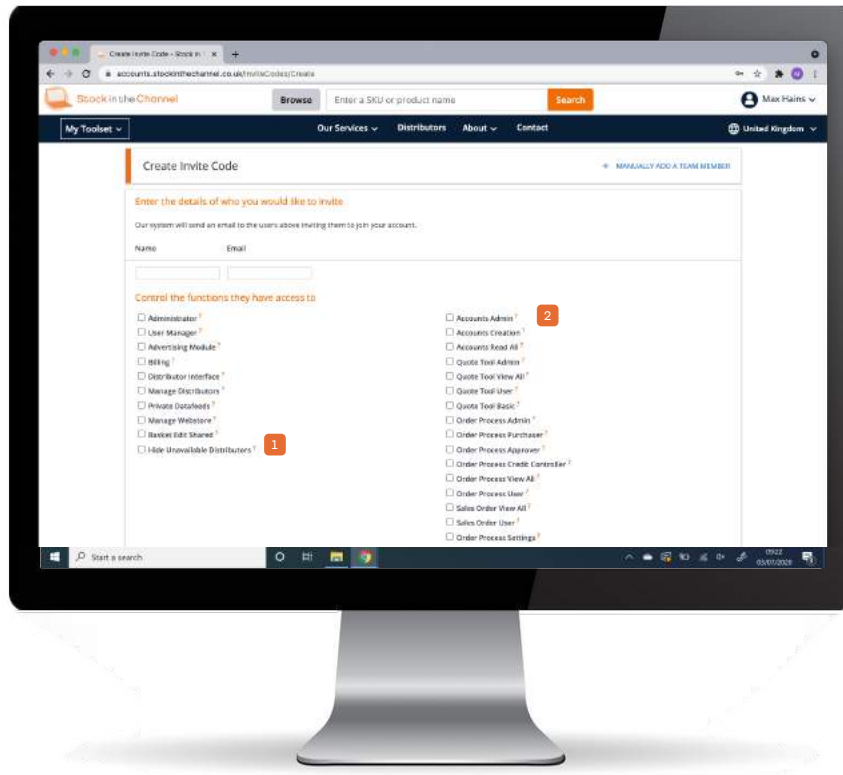
For instance, a Junior Sales Executive could be given the following permissions:
- Quote Tool user
- Account Creation
- Hide Unavailable Distributors

A Purchasing Manager at your organisation, meanwhile, could have:
- Order Process Admin
- Manage Distributors

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Step 3b

1 NB. **Hide Unavailable Distributors** will remove visibility of suppliers that do not have pricing available on your account. There results will be hidden from **this** User (not all Users) in Search results.

2 NB. **Accounts Admin** allows the user to upload account files or create them manually and will also have visibility over all accounts.

This should not be confused the organisation's Administrator role that provides all permissions.

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Step 4
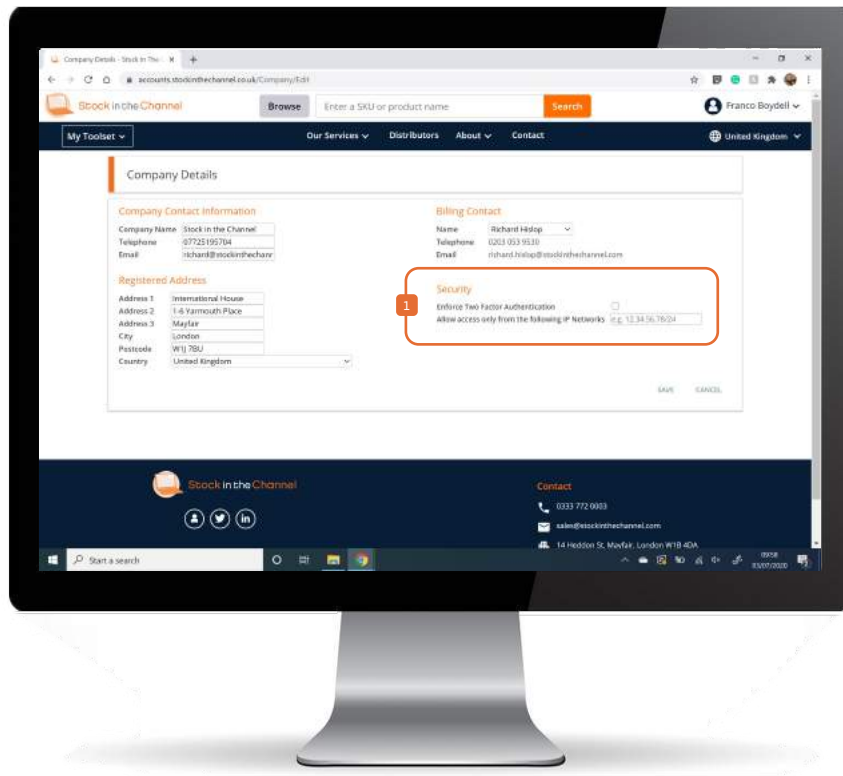
Ensure Company Details are complete. Again, these may be used across Quotes and customer-facing areas - and we are unavailable to send invoices
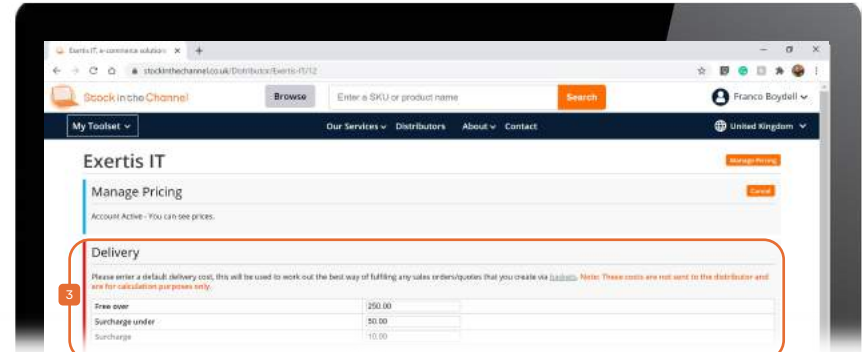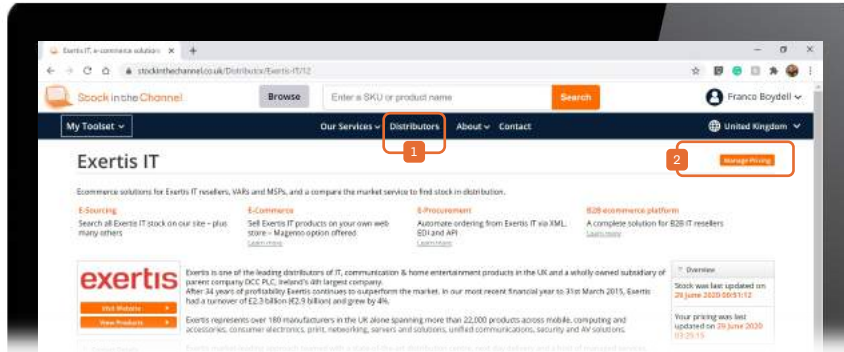
[1] It is also possible to add Two Factor Authentication to avoid any potential unwanted log-ins.
Once activated, SINCH will email you a code to log in.

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Part 2:
Distributor Delivery Settings

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Step 1

1. Head to the main Distributors page and
2. select a Distributor you have pricing from, then go to **Manage Pricing.**

NB. If this Distributor is not yet active, you will have to **Set Up Pricing** first.

NB. This function is only used within the Quote Tool and Order Process areas.

Suppliers typically have standard delivery services available that you may have negotiated rates for.

3. **Inputting these details here** will help save time on every Quote and Sales Order.

This information provides the **Basket auto-fill** tool with the correct delivery costs.
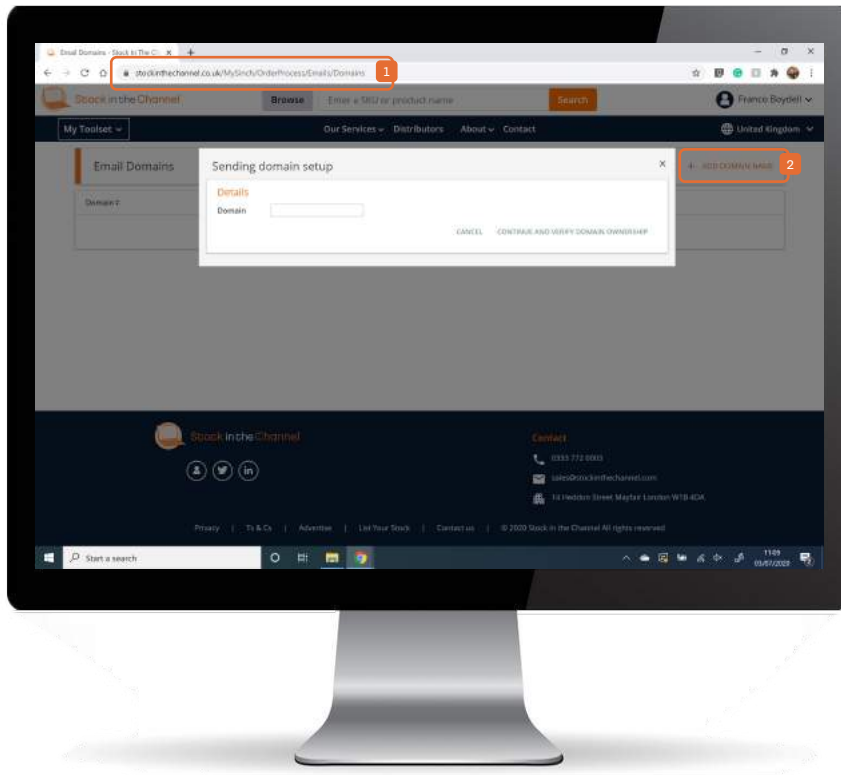
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Step 2
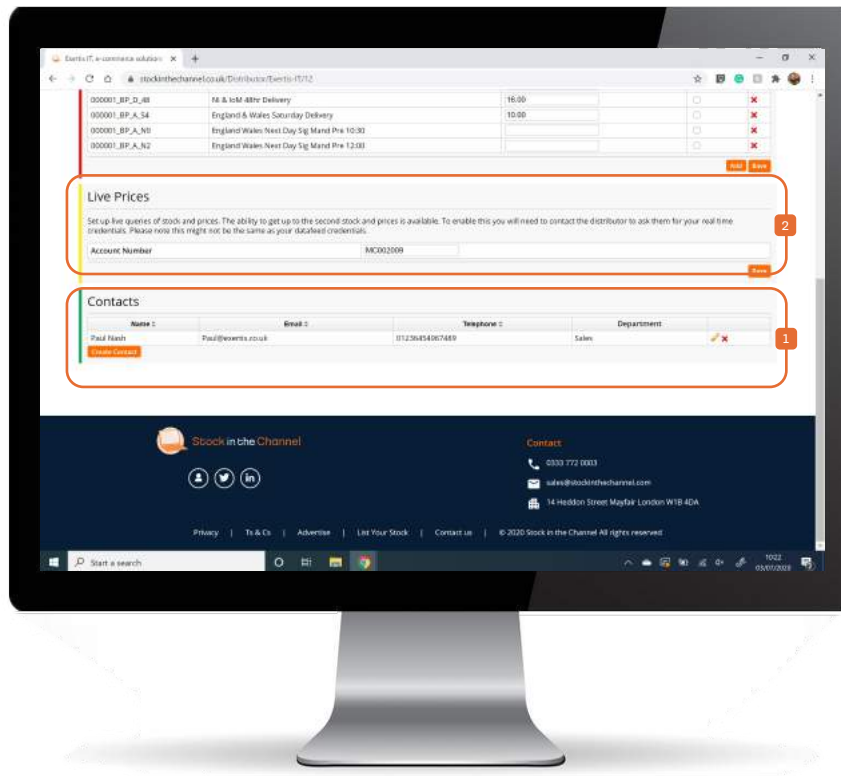
1. Populating the supplier's Contact details will also save you time when sending Manual Purchase Orders.

2. Finally, follow the Live Pricing Instructions if available, populating these fields will enable additional functions on the Search feed.

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Part 3:
Email Client Set Up

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SINCH Mail Client

To use the SINCH built-in mail client you will need to allow us to send email from your domain
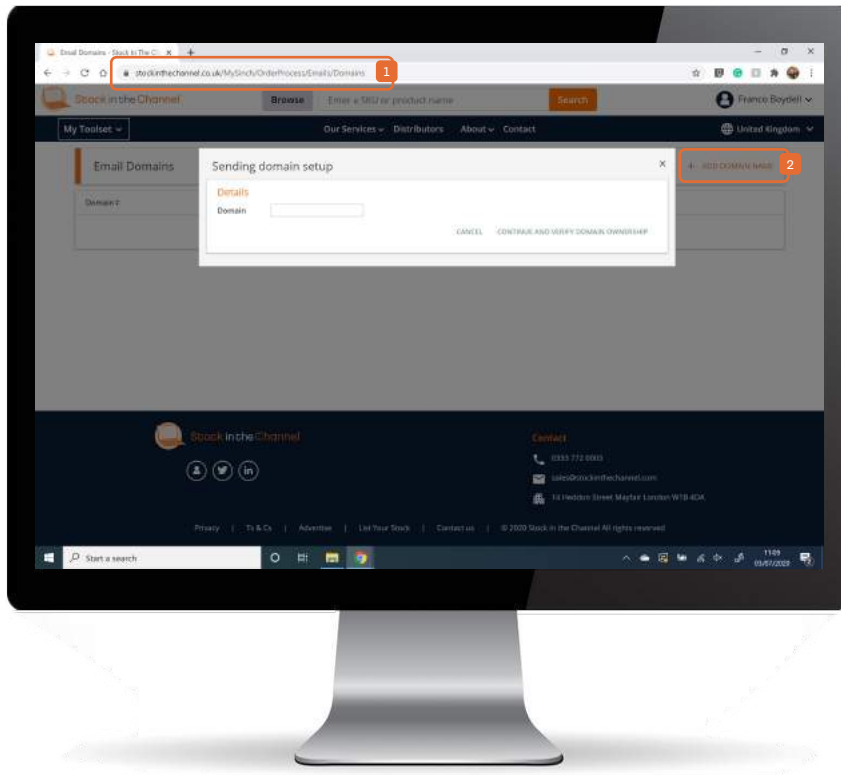
First, head to the site where you manage your **DNS records for your Domain name** e.g. GoDaddy, 123Reg, etc.

Keep this page up to reference.

Next, head to:

1 https://www.stockinthechannel.co.uk/MySinch/OrderProcess/Emails/Domains

2 Begin by clicking **ADD DOMAN NAME** and simply follow the on-screen steps.

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Connecting Outlook

You can also connect SINCH to your own Outlook account.

Head to any Quote, Sales Order or Purchase Order page.

Click the link underneath the information.

Simply follow the guided steps....

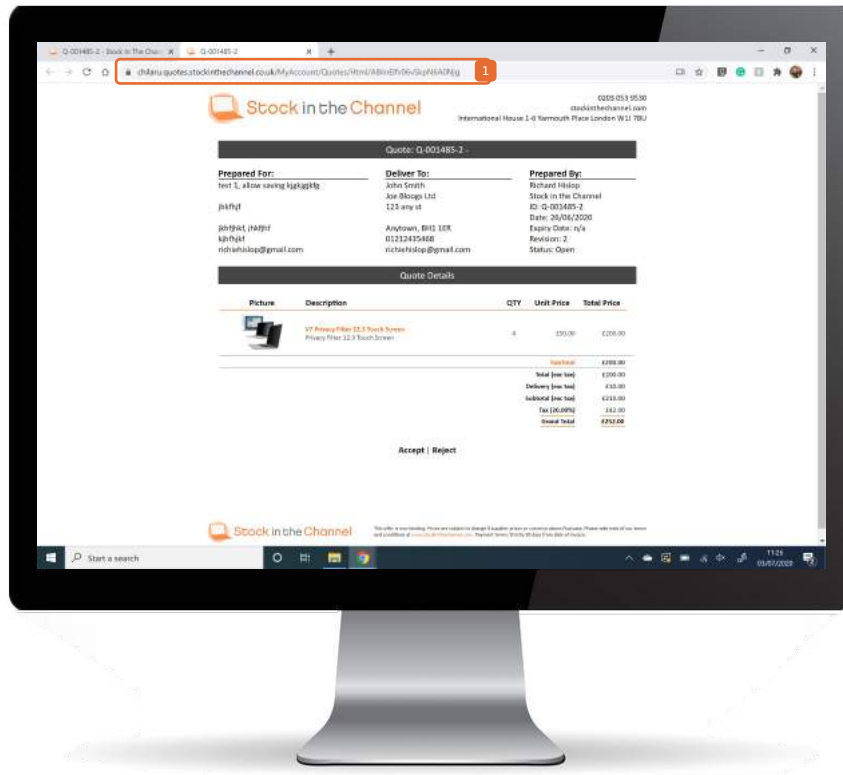Begin by clicking **xxxx** and simply follow the on-screen steps.

Part 4:
DNS Set Up For Public Links

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Step 1

To display your own domain name when viewing HTML Online Quotes, first decide on the subdomain you wish to use.

Example: quotes.yourdomain.co.uk

Next, create a CNAME record for it pointing to the chosen subdomain URL (i.e. quotes.yourdomain.co.uk)

Once you have done this, tell your SINCH account manager the subdomain name you have used, and we will complete the set up on our side.
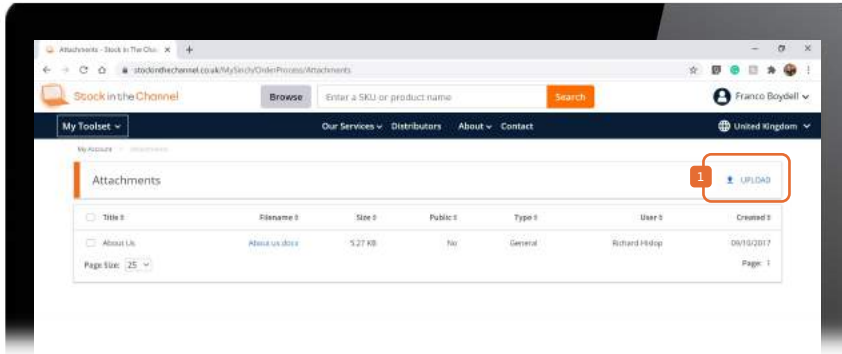
From now on we will provide Online Quotes using your domain name instead of using the stockinthechannel.co.uk domain.

NB. It can take up to a day for a DNS to re-point.

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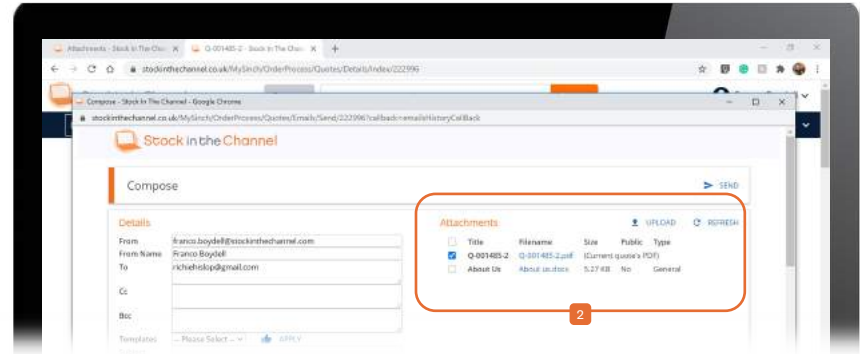
Part 5:
Tools

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Attachments

Navigate to **My Toolset**, **Order Process** and select **Tools → Attachments**.

1 Here you can UPLOAD Attachments that you will frequently use when sending out quotes from the SINCH email client.
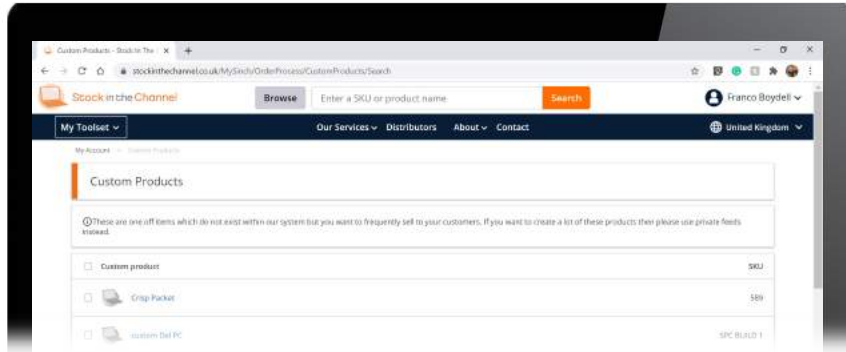
NB. This option is not available using the Outlook integration.

Example: About Us, Terms & Conditions documents

**2** NB. You can also upload Attachments while writing emails within the SINCH email client.

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Custom Products

Navigate to **My Toolset, Order Process** and select **Tools → Custom Products.**

Custom Products are items which don't exist within Stock In The Channel - but you may sell frequently - such as custom build hardware.

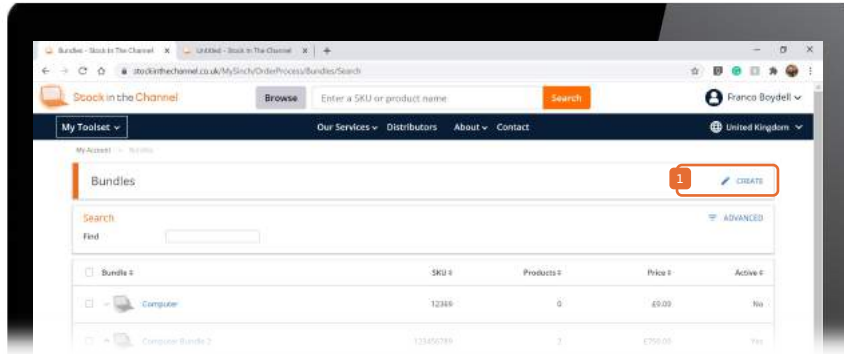These can be viewed and deleted from the Custom Products page.
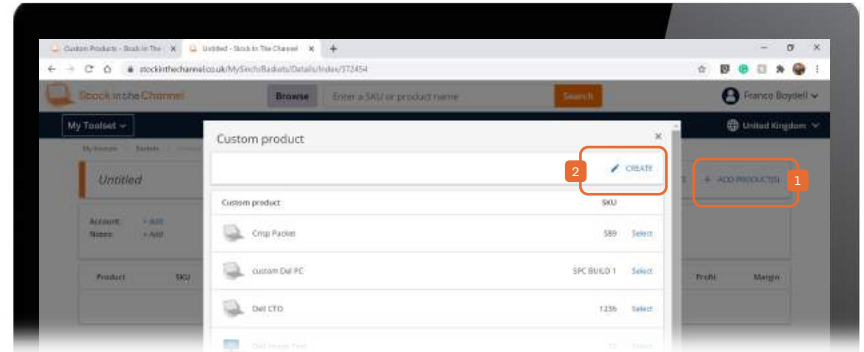
Custom Products are created while building a Basket.

[1] First select ADD PRODUCTS, then Create a
[2] new Custom Product. Here you can also add previously created Custom Products.

NB. Once created you must manually assign a Custom Distributor within the basket
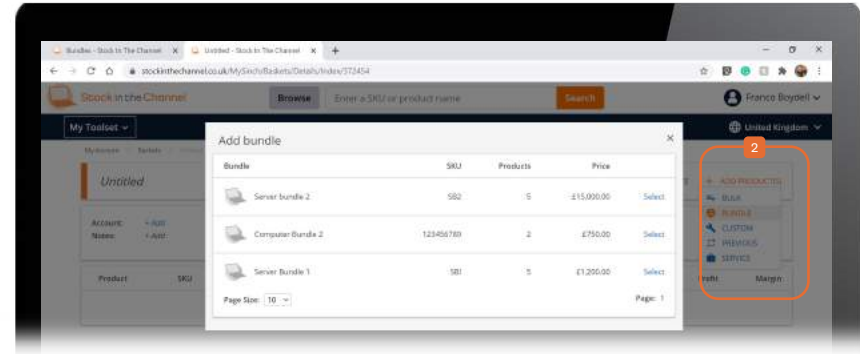
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Bundles

Navigate to **My Toolset**, **Order Process** and select **Tools → Bundles**.

1 Bundles can only be created here, not within the Basket.

Follow the steps to create a new Bundle, make sure you have the SKUs ready in advance to add.
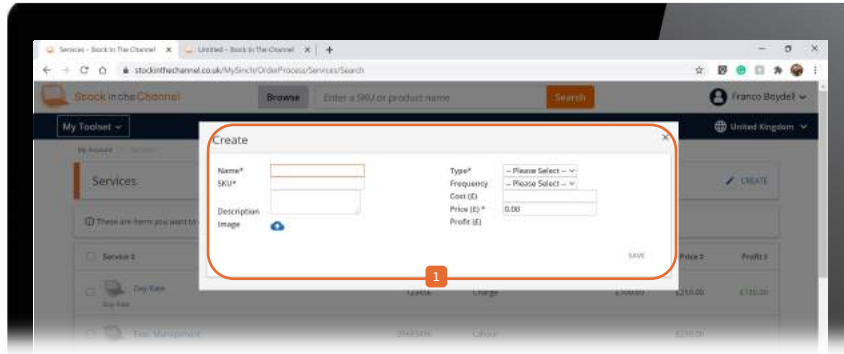
Example: Server Package or New Employee Bundles

2 Bundles can then be added while building a Basket.

NB. Customers will only see one line item with a total cost on their Quote, not individual products and prices.
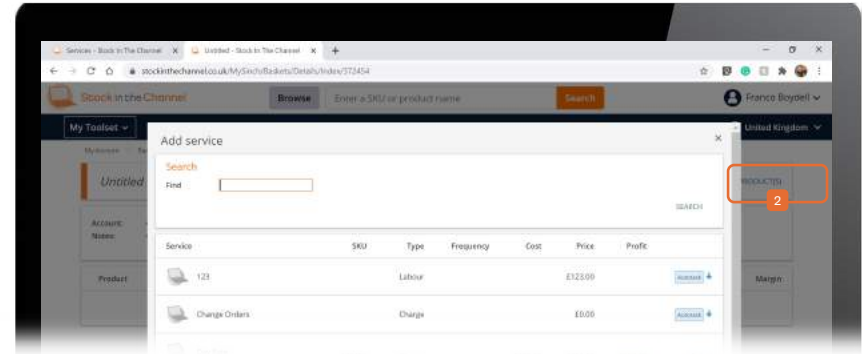
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Services

Navigate to **My Toolset, Order Process** and select **Tools → Services**.

Services can only be created here, not within the Basket.

1 These details will appear on Quotes to provide extra context for your customers.
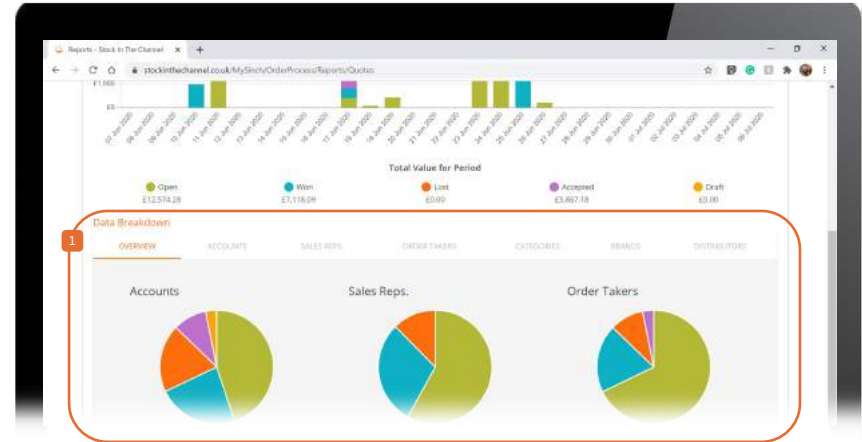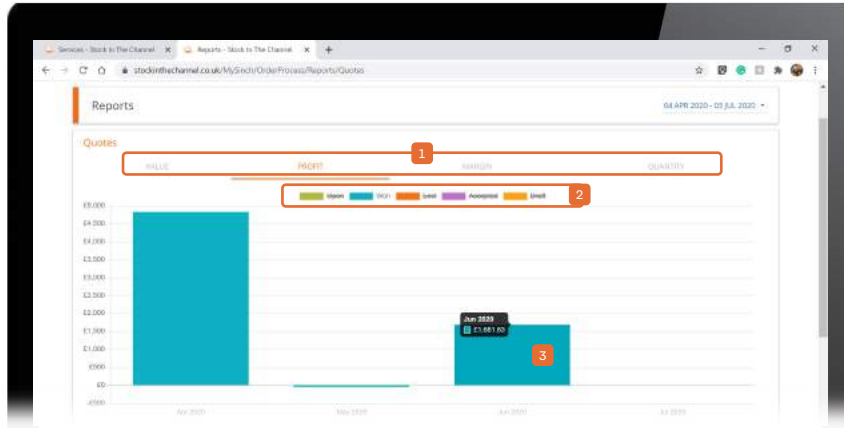
Example: Server Install, POS Set Up, Quarterly Security Review

2 Services can then be added while building a Basket.

NB. Title and prices will be displayed on Quotes. These can be split out from hardware for clarity.

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Quotes & Sales Order Reports

Reports are split into 3: by **Quotes**, by **Sales Orders** and by **Sales Reps Performance**.

NB. You will only see Reports for the services that your Account has enabled.

Reports are a visualization of the data; the raw data cannot be downloaded here but can be accessed within the Quotes Inbox.

1. Select tabs to changes the information displayed for both top and bottom charts.

2. Default view is **All**: cross out the views to filter information.

3. Click on the charts to view the select data within the main Quotes or Sales Order areas.

Tools

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Tools: Sales Rep Reports
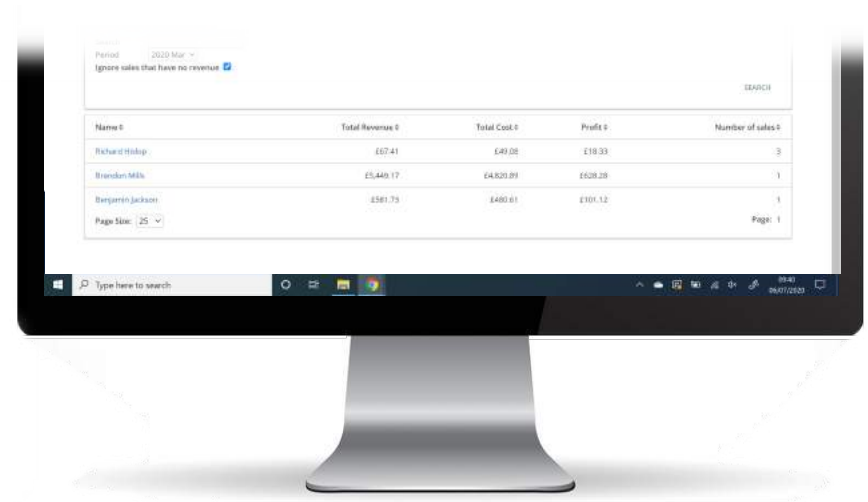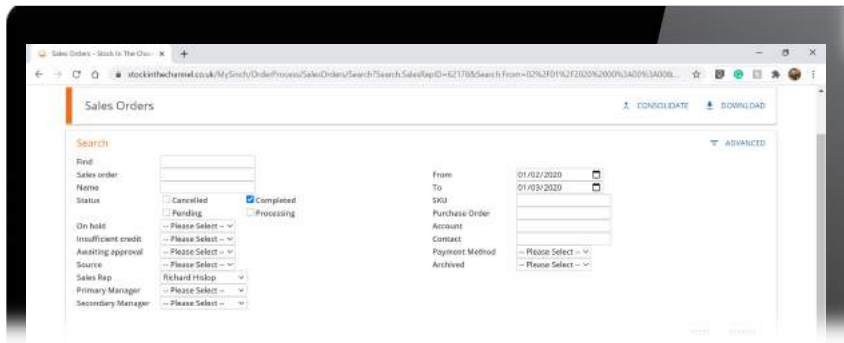
Search by or filter by date range to find a Sales Rep to review.

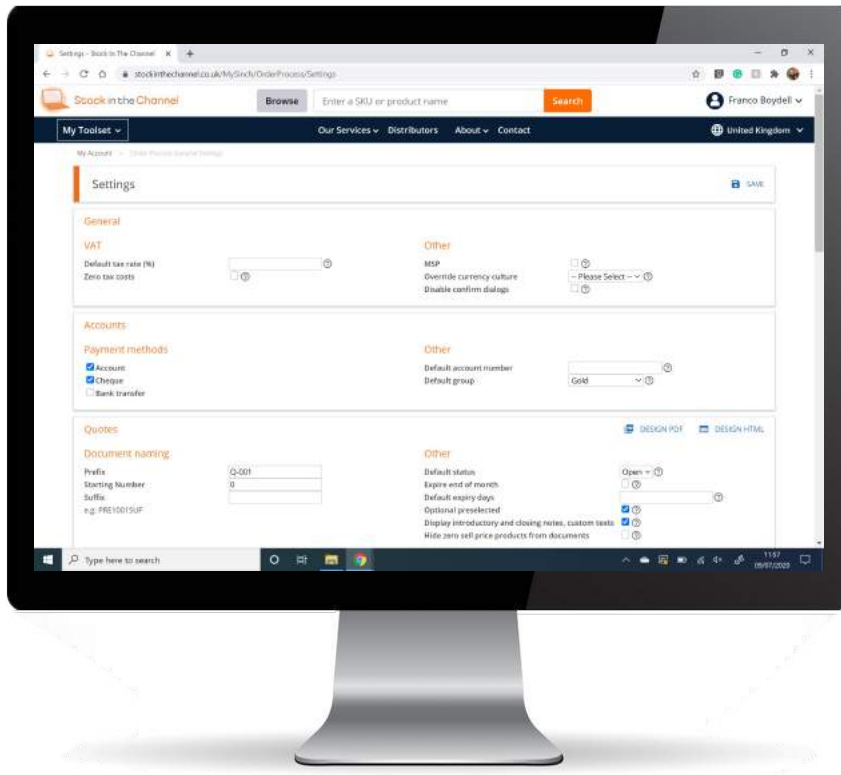This will show the relevant month-to-date figures for this team member.

NB. Returns are not currently included in Totals displayed.

Click through Sales Rep's name to view all Sales Orders that are attributed to them, on the main Sales Order page.

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Part 6:
Settings

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General

Navigate to **My Toolset**, **Order Process** and select **Settings** → **General**.

Settings are only available for **Quote Tool** and **Order Process** customers.

Use the ? Tooltips to explore functions in more detail.

Be careful when first setting up: any changes made are implemented globally across all Quotes and Sales Orders.

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General
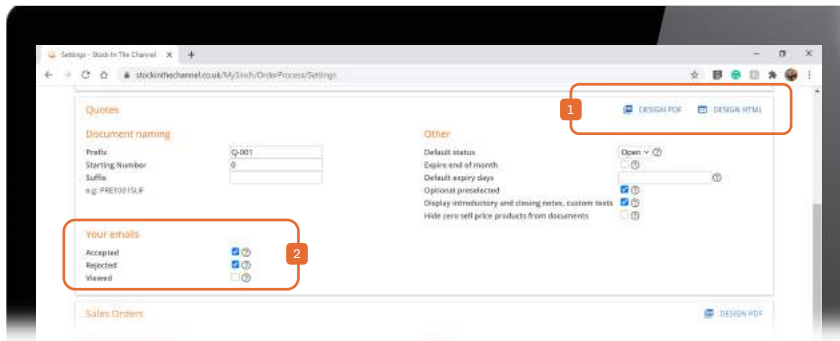
1. You can build branded PDF and HTML Quotes, as well as customized Sales Orders and Purchase Orders.
The SINCH team can help design and implement these.

2. **Your emails** refer to HTML Quotes, to receive and email notifications when Quotes are Accepted, Rejected or Viewed.
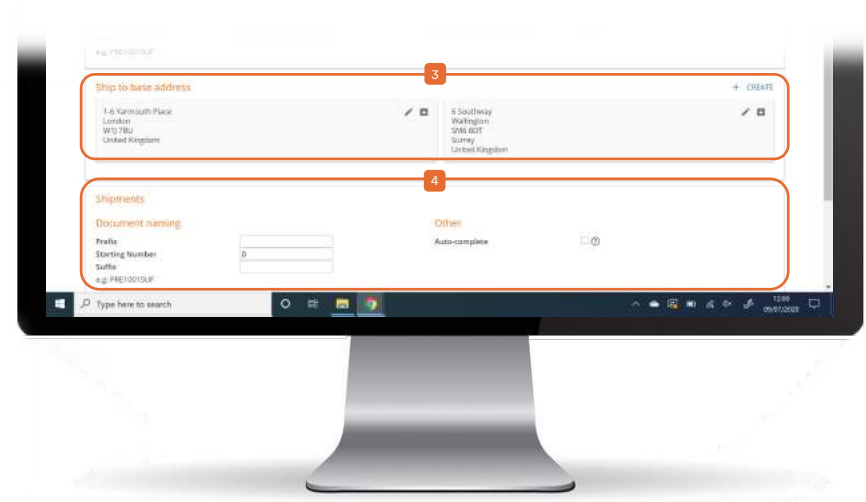
3. Ship To Base addresses are your premises (for example, your own warehouse or an engineer's home address) that are used for Consolidated Orders or POs that need changing/customizing before sending on to customers.

4. Shipments allow you to sell stock you already own without creating a PO.

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Delivery Rules
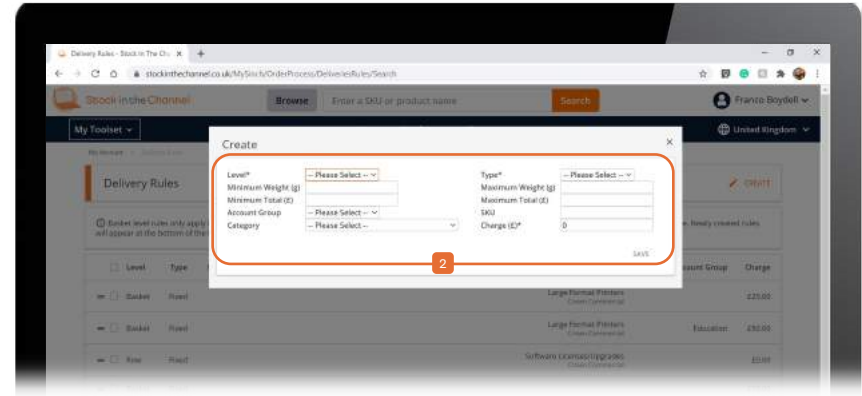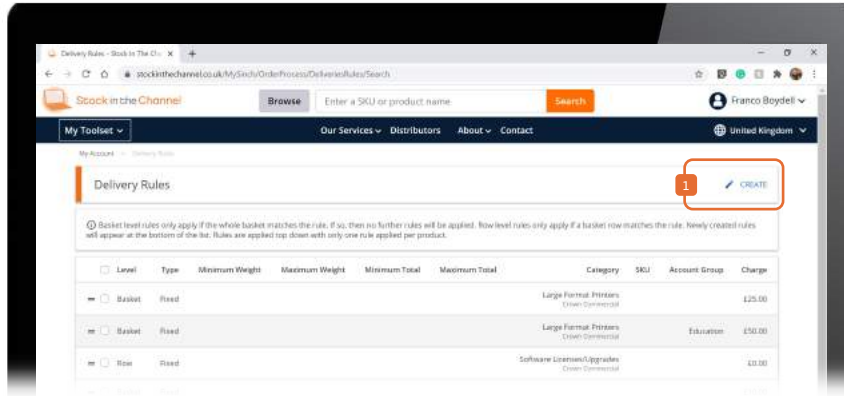
1 You can create rules that automatically calculate the carriage you will charge your customer based on the products you are shipping.

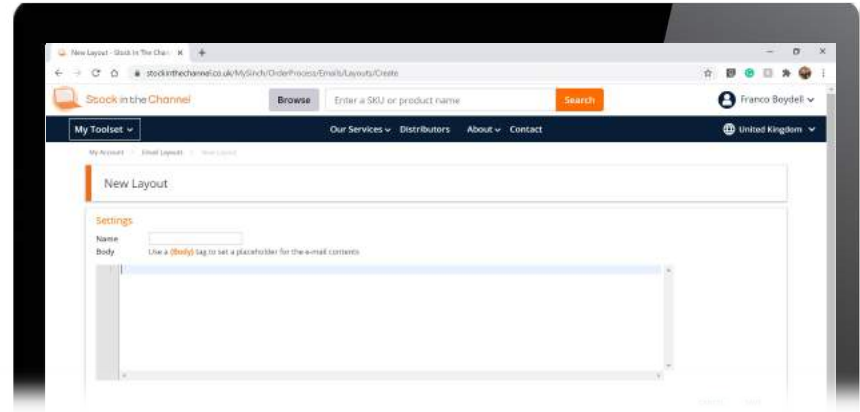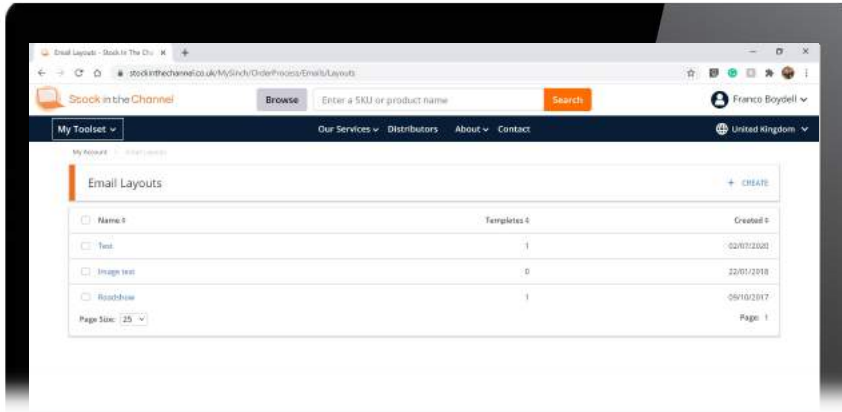You can create as many as you would like.

2 Use the parameters available to create specific

Example: A Quote with a small Total cost may warrant a higher delivery cost.

Example: You know Printers arrive on a pallet, therefore add delivery cost to cover this.

Example: Software purchases are sent by email and do not need a delivery cost.

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Email Layouts

You can build Email Layouts to quickly access when using the built-in SINCH email client.
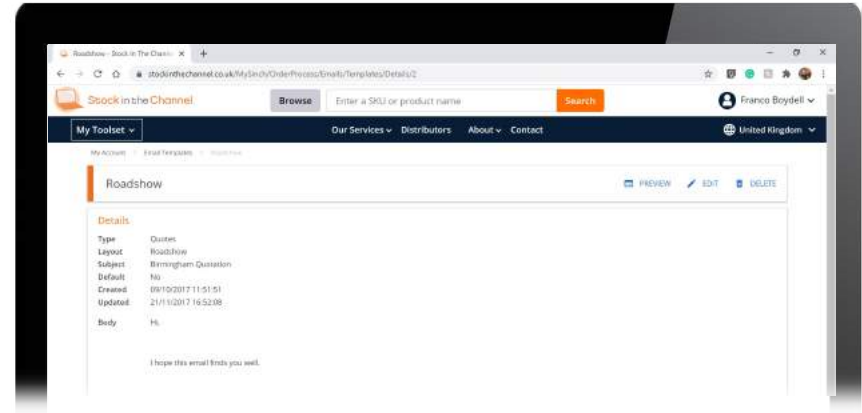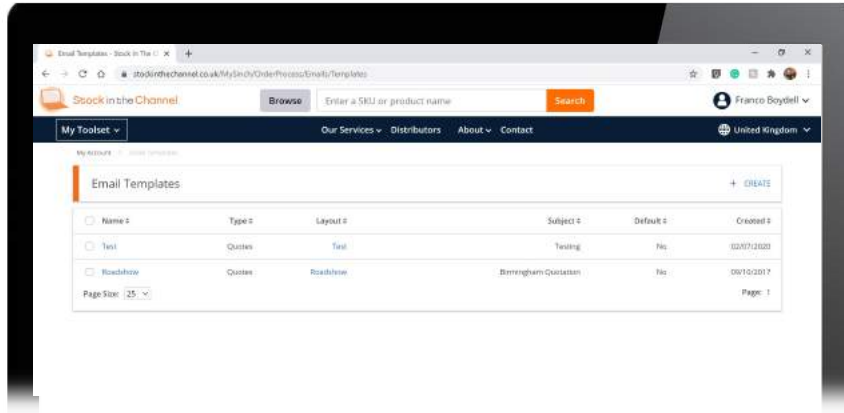
NB. Layouts are written in HTML.

Layouts refer to the overall looks and feel or the email, such as the header and footer of the email.

Editing the Email Layout will apply a header and footer to all emails.

The {Body} content of the email can be created directly when writing an email using the client or inserted from a pre-written Template.

Email Templates

You can pre-write Email Templates to quickly access when using the built-in SINCH email client.

This tool is designed to save time when sending out repeated or similar messages.

Select whether you are creating a Template for Quotes, Sales Orders or Purchase Orders.

You can have an unlimited number of templates, which can be edited when composing an email using the built-in client.

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Thank you

If you have any further questions, please email or call your Stock In The Channel Account Manager and they will be happy to provide any additional information.

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