Stock in the Channel

Module 6: Working With Magento

Modern Selling How-To Guides

Intro

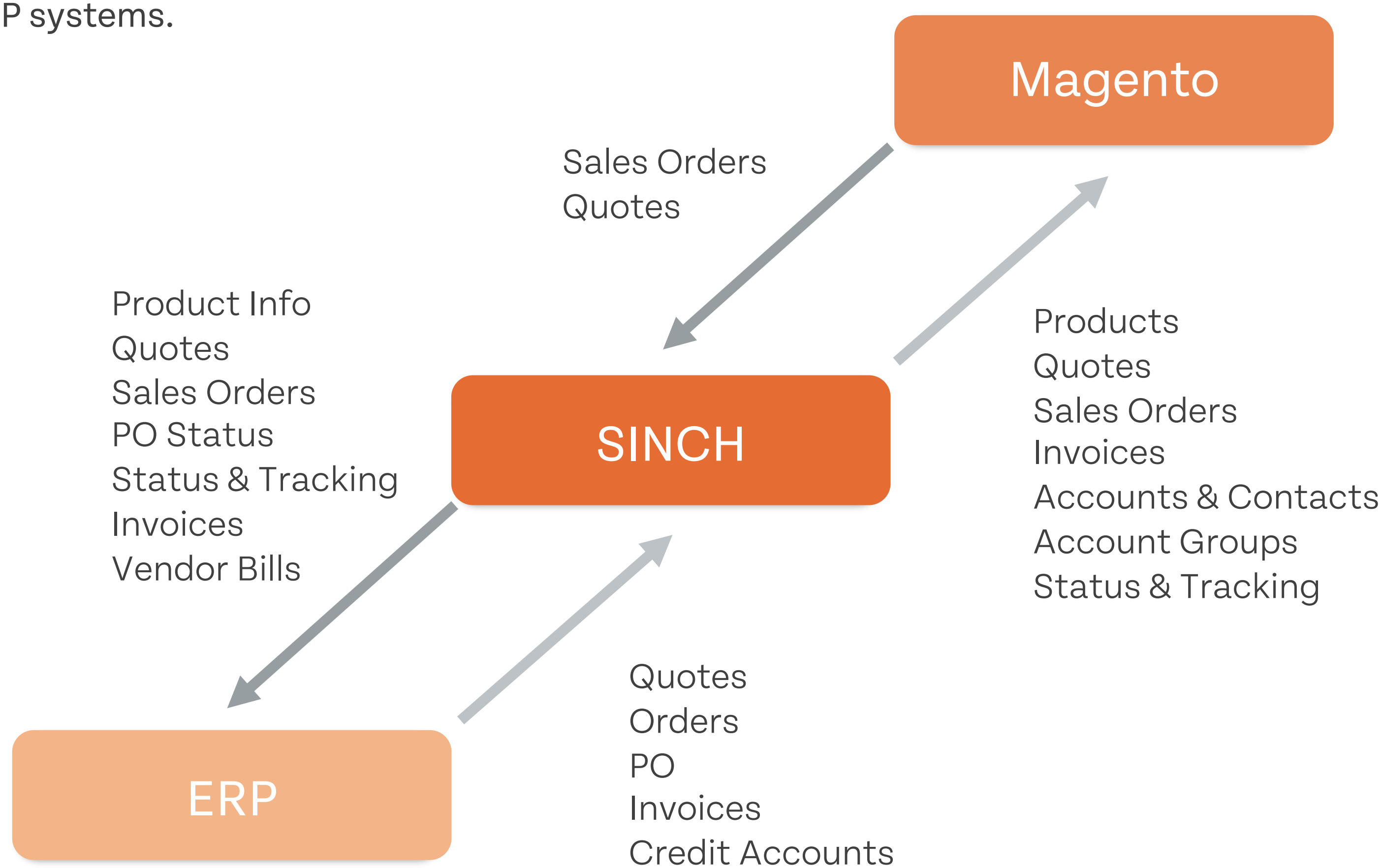
Stock In The Channel acts as the hub between your ERP, distributors, data providers and customer portal / Magento webstore. SINCH seamlessly passes all data between your systems so that you're not spending your time re-keying information.

This Guide shows you how to use the back-end and front-end of your Magento platform alongside your Stock In The Channel dashboard. Whilst following this Guide to familiarise yourself with these systems, we recommend having all platforms open.

While the initial Magento integration will be implemented by SINCH, our hope is that this Guide will help you maintain the portal and serve as a reference as you onboard new customers.

Please note this is not a general guide to using Magento and deals specifically with Stock In The Channel modules.

Stock In The Channel publishes datafeeds to an FTP location.
Magento connects to the FTP to import all your catalogue data to your webstore.
API integrations are utilised to synchronise data between SINCH and ERP systems.

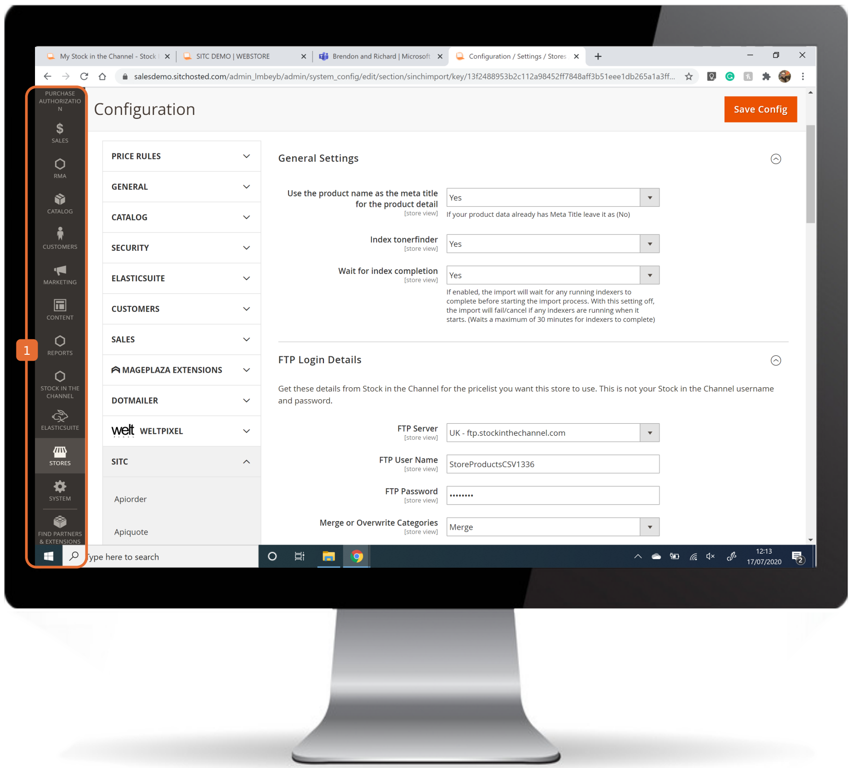


Stock in the Channel

SINCH How-To Guides

Part 1:
SINCH Import

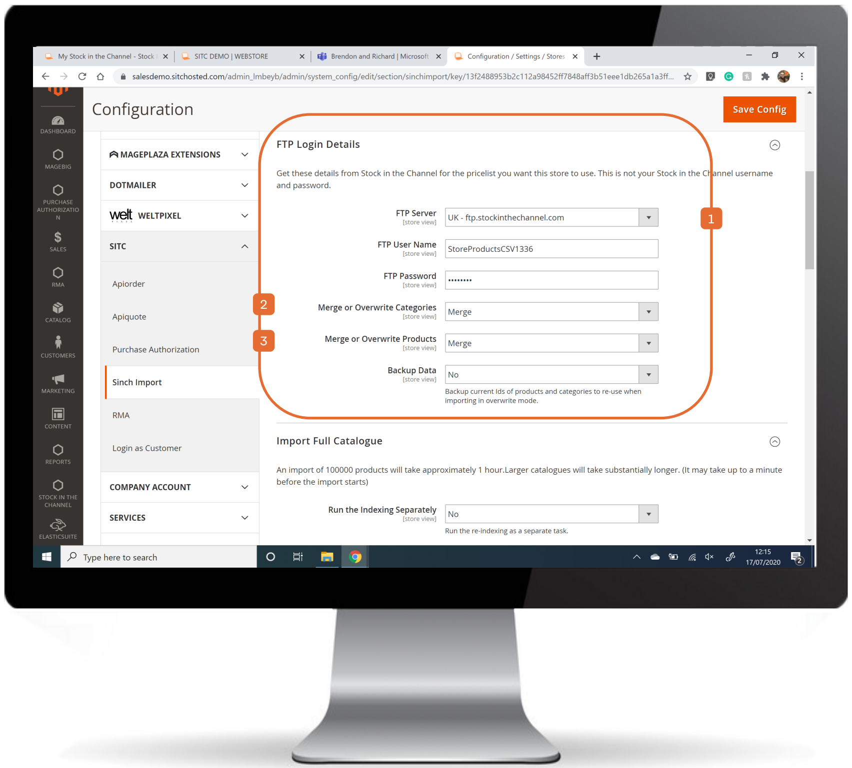
Step 1



Log into your Magento webstore admin.

1. Navigate to **STOCK IN THE CHANNEL** on the left-hand panel and select **Import Data**.

Step 2



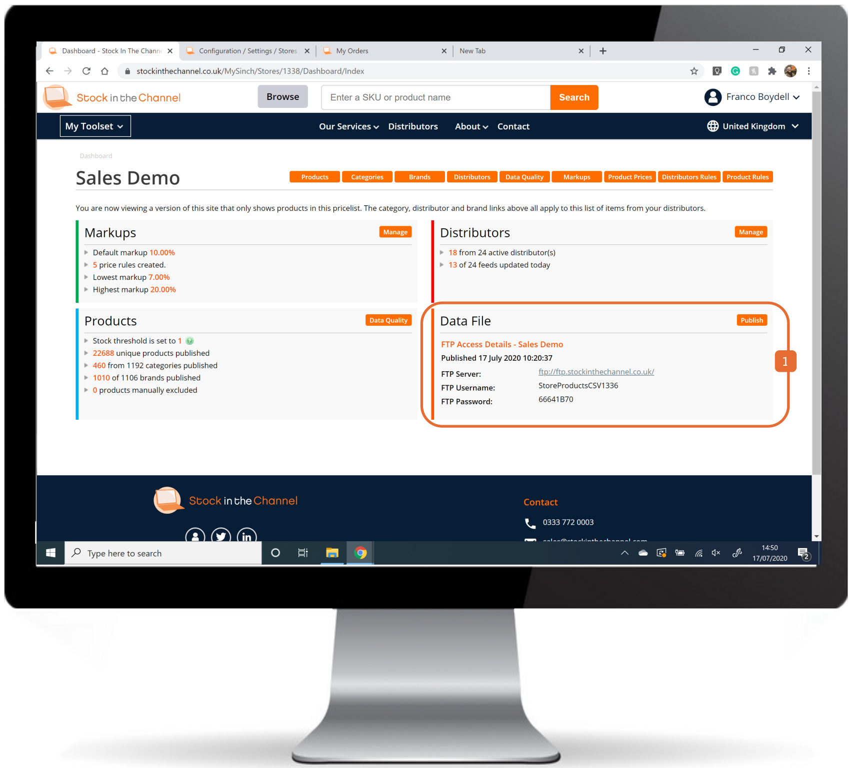
1. Input your **FTP credentials**, found on your SINCH Stores Area.

   Full information can be found in Module 2: Setting Up Your Stores Area.

2. 3. Choose **Overwrite** when first creating new product IDs and establishing the navigation categories on your webstore.

   We recommend changing this to **Merge** after you have finalized your category tree structure, in order to maintain the same category and product IDs.

Step 3

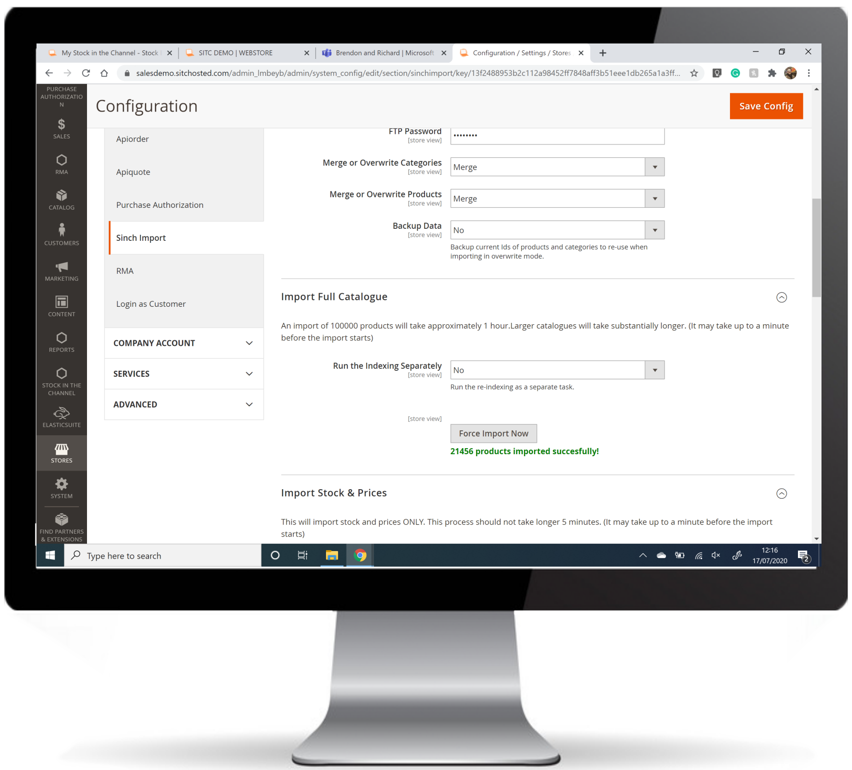


Full catalogue imports are scheduled for Saturdays but can be configured to run each evening if you wish.

1 If you make any changes to your catalogue or pricing, and wish to see this on the same day, you will need to **Publish** this from your SINCH Stores Area.

Stock in the Channel

Step 4



1 Full import will bring in all data from the file published in SINCH.
This include categories, content changes, new products.

Stock and Price Import will simply updated products that are already within Magento with their most up-to-date Stock and Price
2 information.

Stock In The Channel offer an automated, hourly Stock and Price publish and import service for an additional cost.
Contact your Account Manager for the further information.

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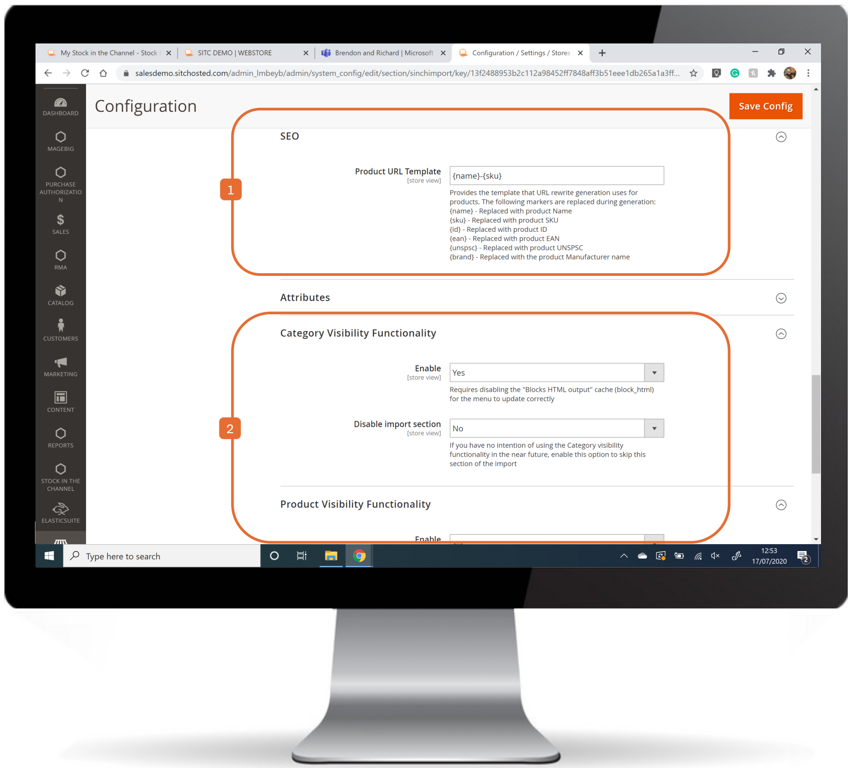
Step 4



1. Use the SEO tool to define the product URL, this can be configured however you'd like to work with your marketing campaigns.

   In Module 3: Working With Customer Groups we explored setting up custom catalogues for certain accounts.

2. If you're using this functionality, please ensure that **Category & Product Visibility Functionality** settings are enabled in Magento.

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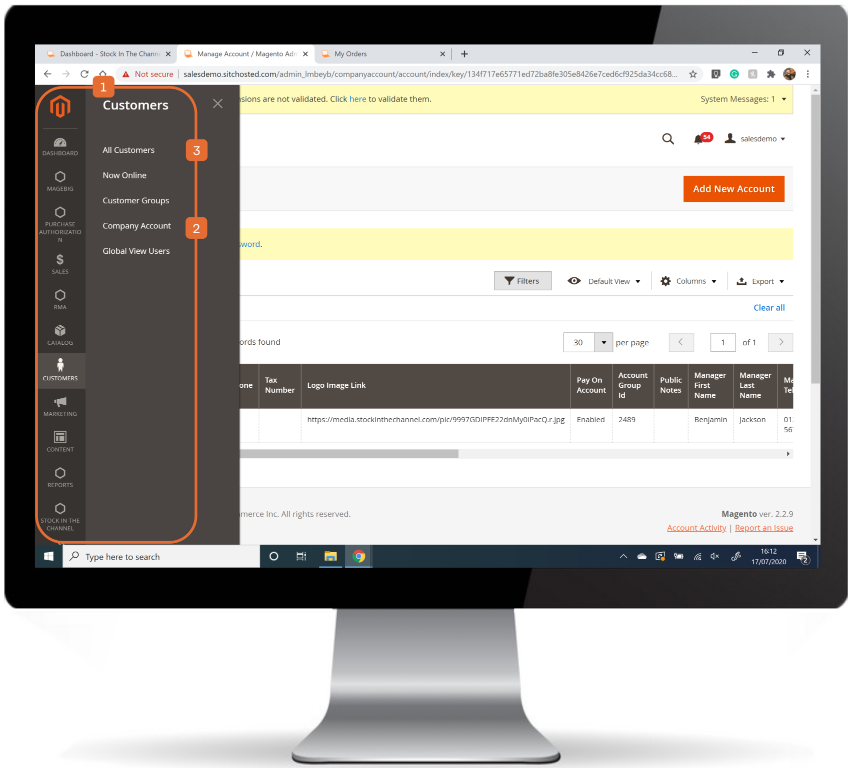
Part 2:
Accounts & Contacts

Step 1



Magento Term	SINCH Term
2 Company Accounts	Accounts
3 Customer	Contacts

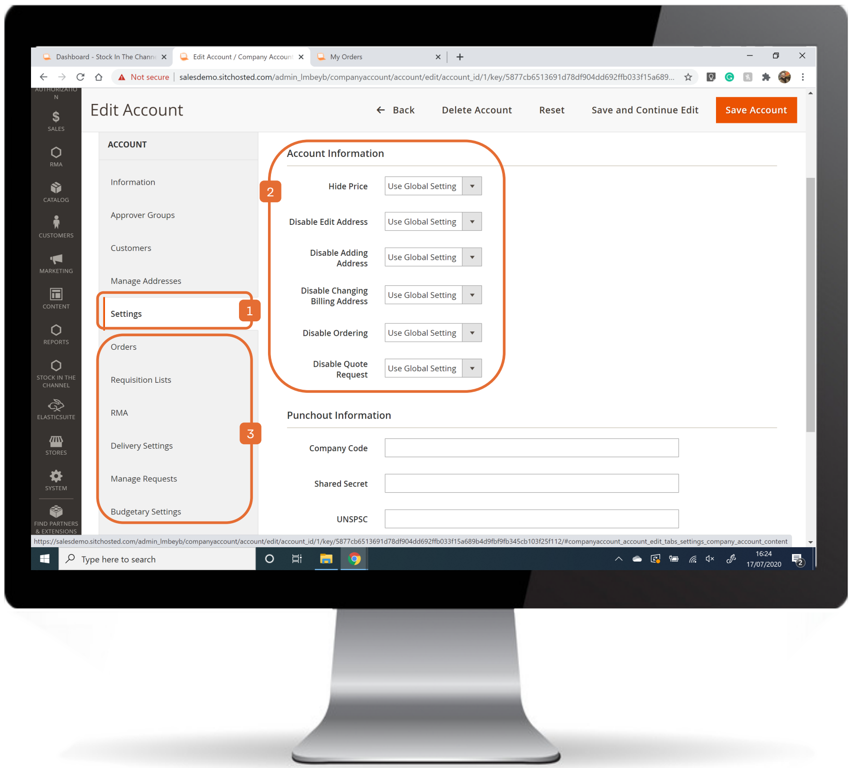
If you're using Modern Selling, Stock In The Channel can sync your Customers – your Accounts & Contacts – with Magento.

On the Magento back-end, navigate to
1 **Customers**.

Creating new customers on SINCH was covered in Module 2: Creating Accounts & Contacts.

Within Company Accounts you will see listed all Accounts that you have been created within SINCH.
Click on an **Account** to view full details as well as edit their settings.

Step 2



The **Default Billing** and **Shipping Addresses** are set within SINCH and can automatically pushed through to Magento.

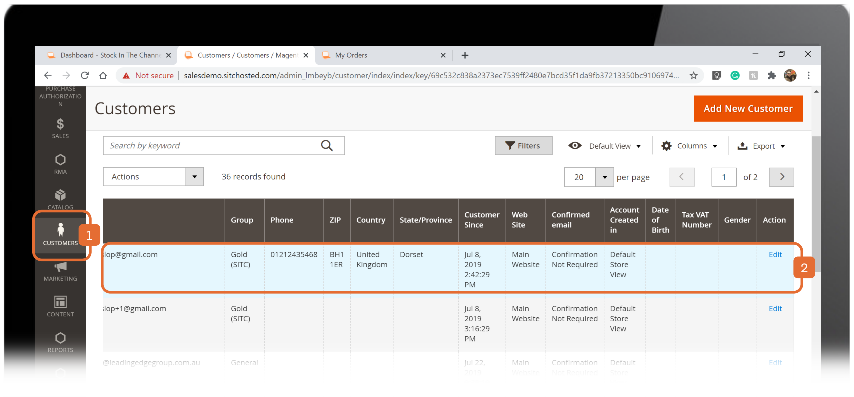
1. Choose **Settings** from the left-hand Account Menu.

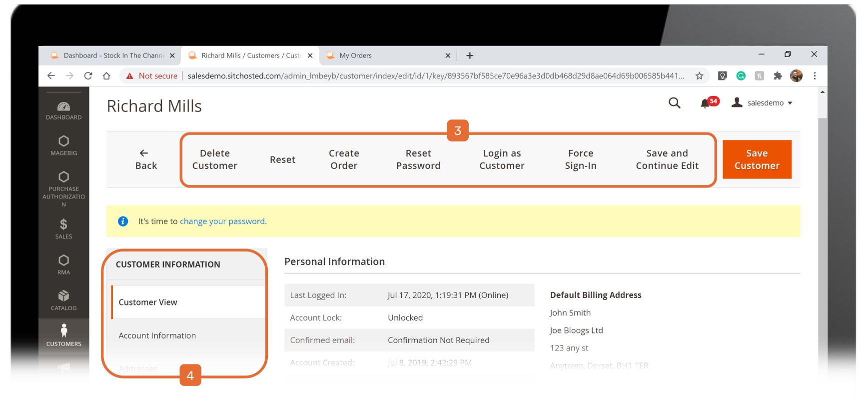
2. Here you can hide or disable front-end functionality for different Accounts.

3. NB. Orders, Requisition/Core Lists, and RMA can be seen for each Account here. These will be covered in more detail later in the Guide.

Take time to review every point in each section to make sure they are correct.

Step 3





1 Navigate to **All Customers** to search for a Contact from any Account.

2 Click **Edit** on the far right of their search result to the see the full details of this Contact.

Customer data is automatically populated from the Contacts file on SINCH, such as Customer Group or addresses.

3 You can act on behalf of an end-user should this be appropriate, such as requesting a password reset or creating an order on their behalf.

4 There are many, self-explanatory options for you to use. You will only see options that reflect the services you are signed up for.

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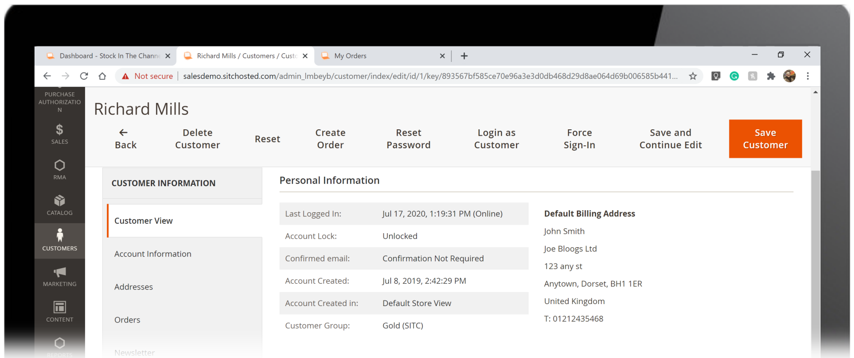
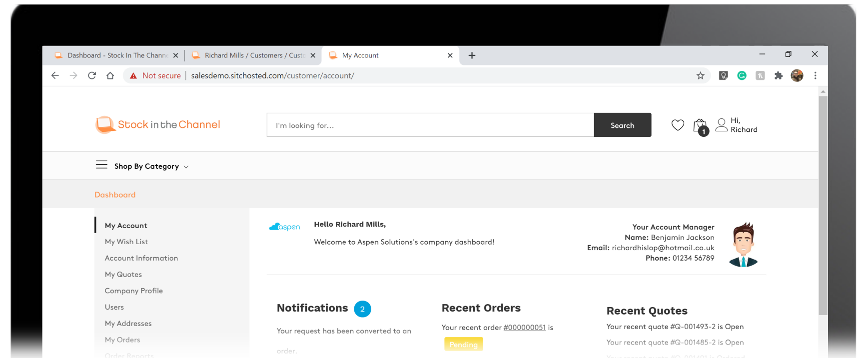
Step 4



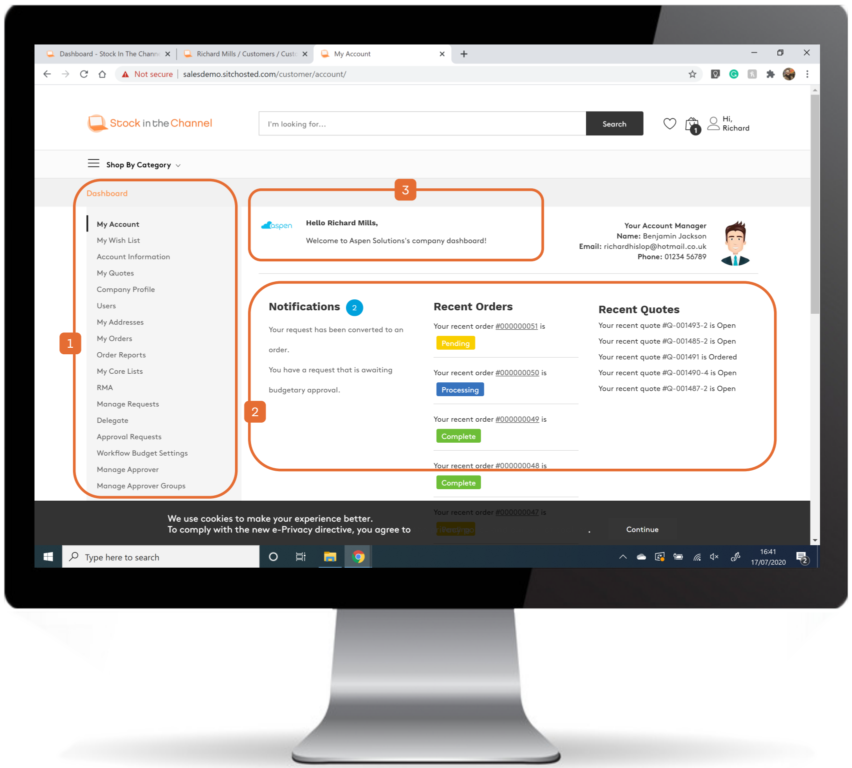


1 You can also **Login as Customer** to access the front-end of your webstore as they experience it to help support with any issues.

3 This will help demo the service to potential customers, as well as onboard new Accounts and Contacts, and allow you to see exactly what they're seeing on your site.

Part 3: Dashboard

Step 1



NB. It is likely that you will set up each Account with at least one Admin user first.

Use **Login as Customer** to view the webstore front-end Dashboard.

1. Based on the user role there will be different sections available on the panel – features and functionalities are self-explanatory but take time to familiarise yourself with the options if using the platform for the first time.

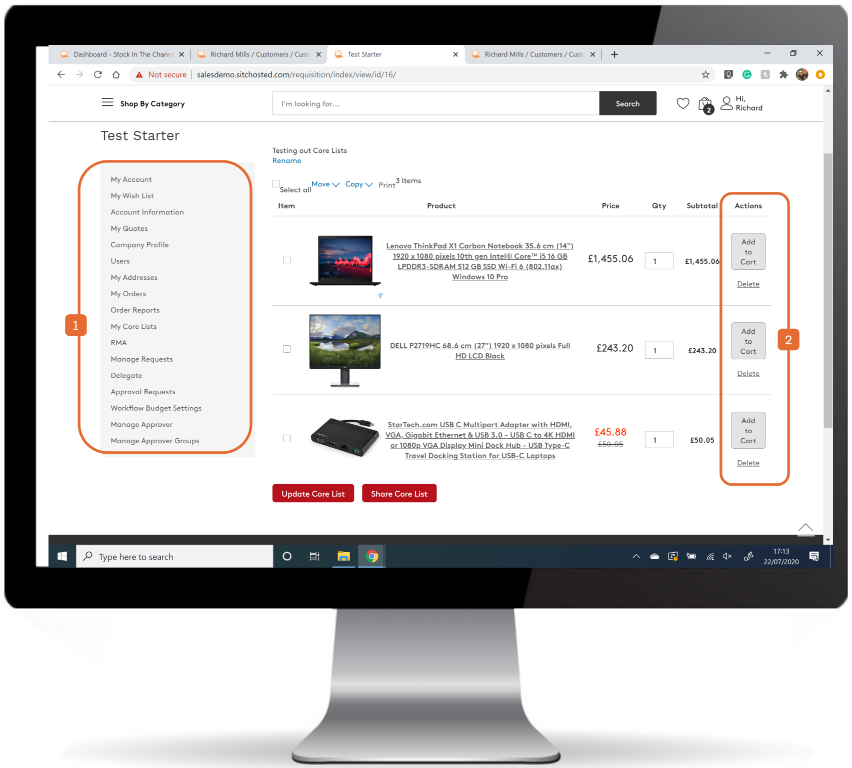
2. Pending purchase requests are visible in the Notifications section, as well as previous Orders and Quotes.

3. You can also write message for your customers (i.e. promotions) appear next to their company logo and personal details.

The objective is to give your customers the most personalised experience possible.

Part 4:
Core Lists

Step 1



Core Lists are lists of frequently purchased products that are specific to an Account, to make it easier for customers to order groups of items

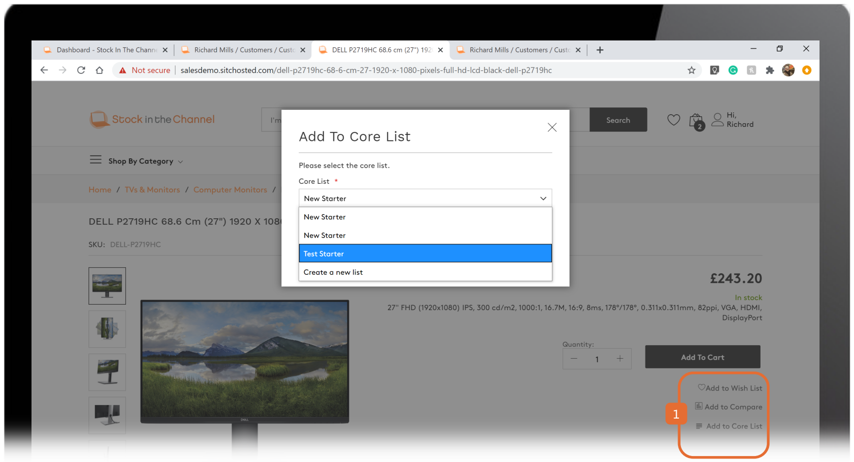
Example: Buying replacement toner for their printer, or for a New Starter at the company.

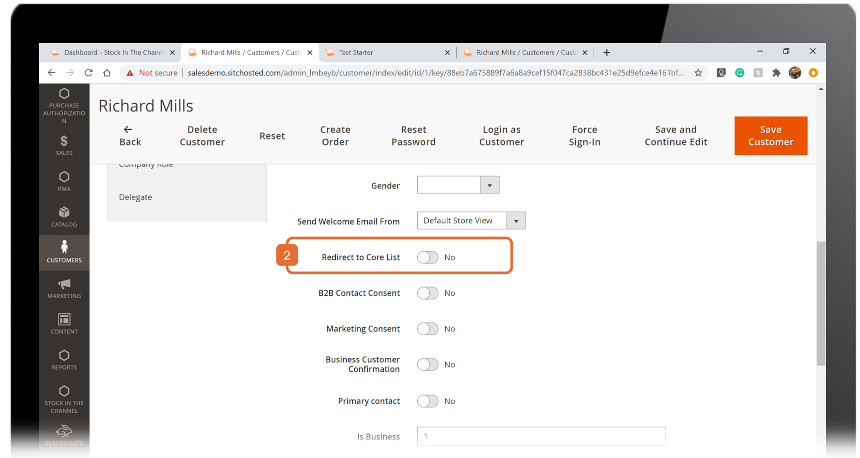
1 Head to **My Core Lists** on the front-end to view and Create New List. You can create as many lists as you want for each customer.

NB. Products must be added to Core Lists directly from the product page, demonstrated on the next page.

Once a Core List is built-out with products,
2 Customers can then simply **Add to Cart.**

Step 2





You can work out the components of a Core List with your customers, setting the lists up on their behalf is a great way to make your site easy for customers to use.

To add a product to a Core List, search for the item, view product details and **Add to** 1 **Core List** directly from the Product page.

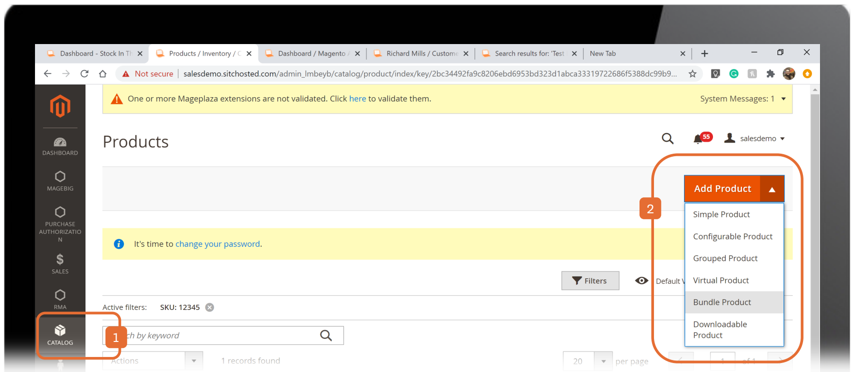
Customers can then simply **Add to Cart** from the Core List (see Step 1).

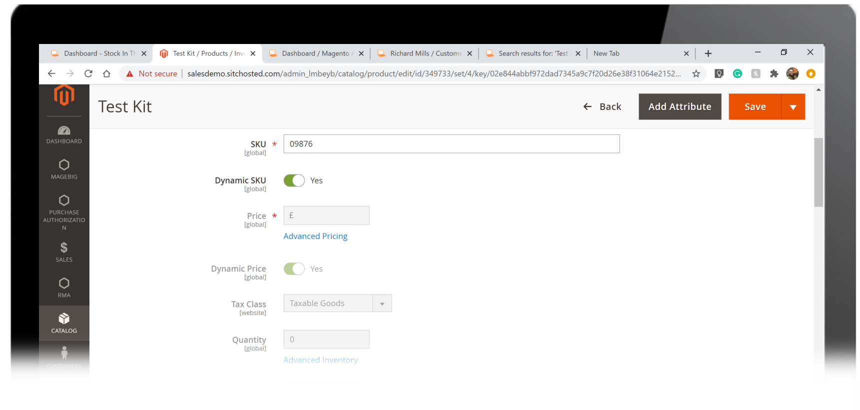
It may be useful to **set the Core Lists page as the landing page for some users** so that they can quickly purchase.

To do this, head to this Customer's settings on Magento, navigate to their 2 **Account Information** and turn on **Redirect to Core List.**

Part 5:
Bundles

Step 1





Bundles are groups of products that you want to sell together, such as a New Starter Kit, that are sold to different accounts.

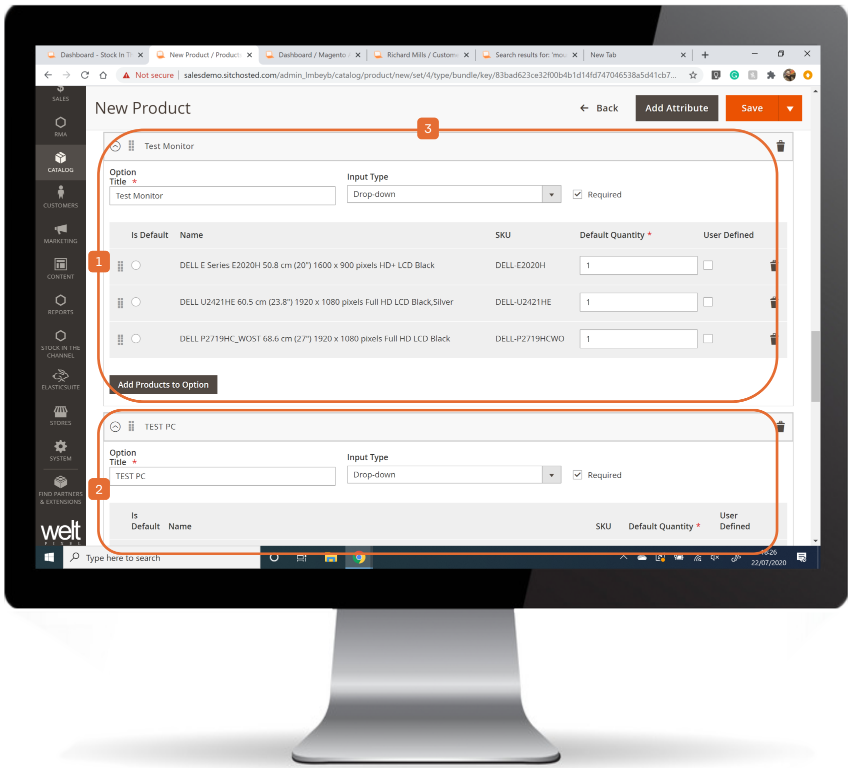
These are created from the Magento admin panel.

1 Head to **Catalog**, **Products**, and then select
2 **Add Product → Bundle Products.**

Here you can set the Bundle Product details and **add it to a Category on your webstore** so that customers can easily purchase.

Use the **Bundle Items section** build out the group of products.

Step 2



To create a Bundle add an **Option and give it a title, then** simply select the products that you want included.

Each bundle can have multiple **Options** to allow your customer to choose from multiple products, to give a controlled level of freedom to build their own set up.

Example: building a PC set up.

1 Option #1: Monitor (choose from 3)

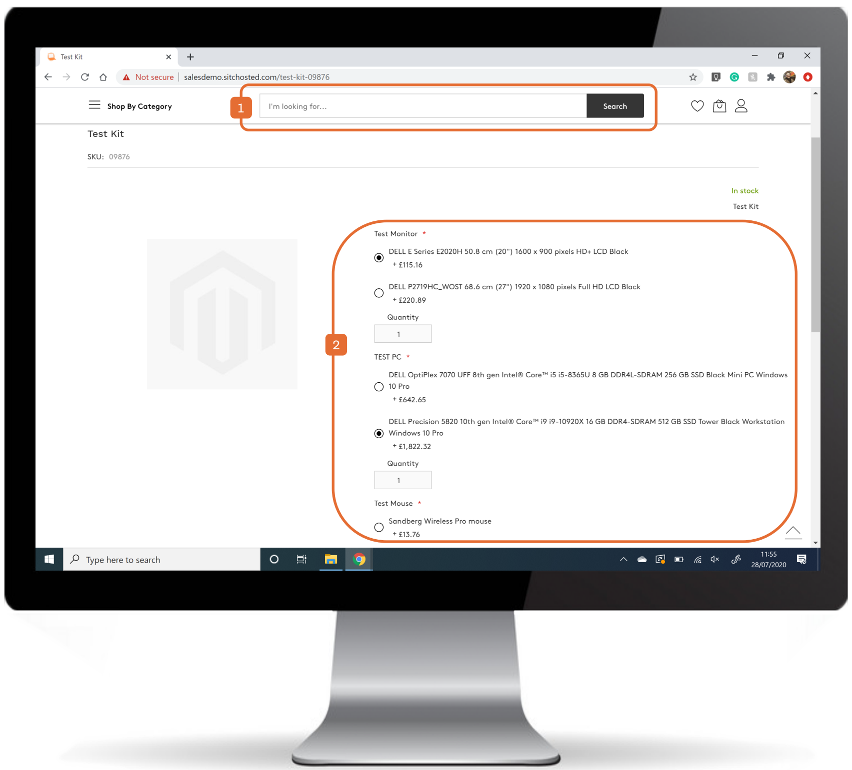
2 Option #2: PC stack (choose from 2)

Option #3: Mouse (choose from 2)

Etc...

3 NB. You can also choose **Input Type** to display different types of selector buttons on the front-end.

Step 3



1. On the front-end of your webstore, search for your newly created Bundle.

   Here we can see the Bundle available to purchase with the different product options for the customer to build.

2. Your customers can then put together the Bundle using the selector buttons.

Part 6:
Purchase Authorisation

Purchase Authorisation Overview

Purchase Authorisation allows your customers to set up a tiered approval process for **requesting and approving orders** within their organisation.

User roles are **enabled in the Account settings** and **set individually for Users**.
These can be set in the Magento back-end or your customer's front-end dashboard.

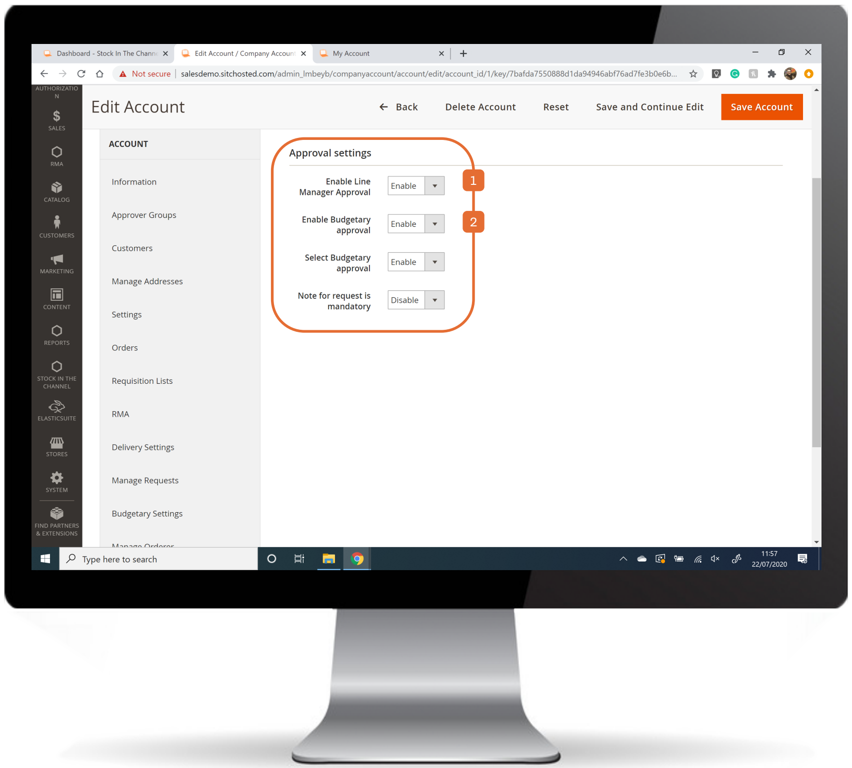
Users can be given any of 3 permissions:

Requestors can request purchases, but do not have the authority to buy.

Orderers can request or approve orders according to value-based rules.

Admins can have the same permissions as Orderers - and can also change other users' roles and create Purchase Approval rules.

Step 1



First you need to **turn on the Approval Settings.**

Head to your customer's **Account area** on Magento and select **Edit**, then navigate to **Approval Settings.**

1. **Enabling Line Manager Approval** activates the Requestor user function to request purchases.

2. **Budgetary Approval** is more common to allow specific people to order to set values.

These can also be set by your customers' Admin on the front-end.

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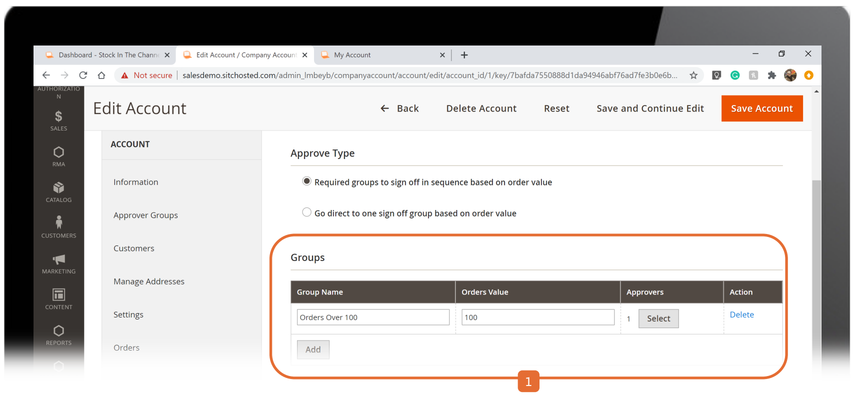
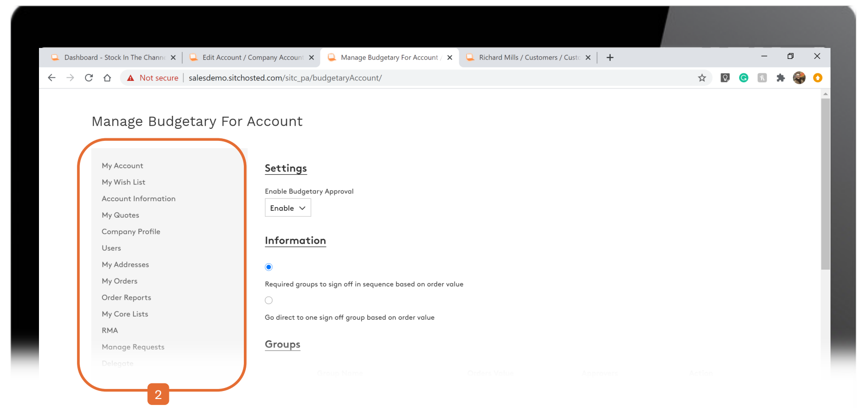
Step 2





In the **Budgetary Settings tab** you can set an unlimited number of rules.

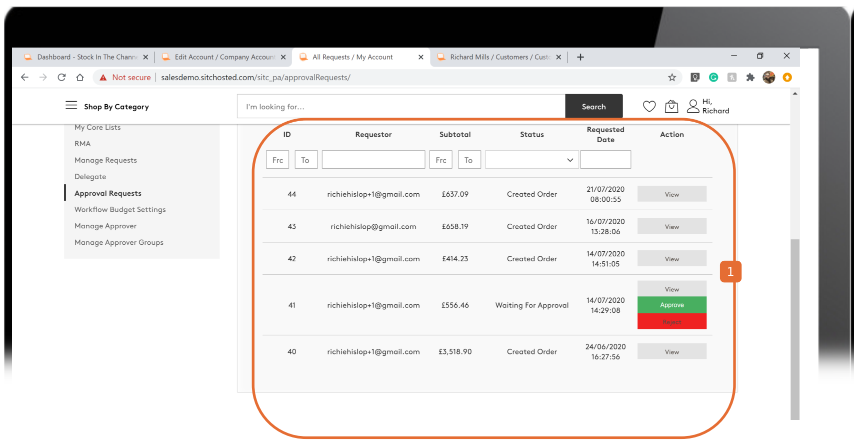
1 Set the value and then select the Approvers from this Account's team. *Approvers can only be part of one group and must have Admin/Orderer status.*

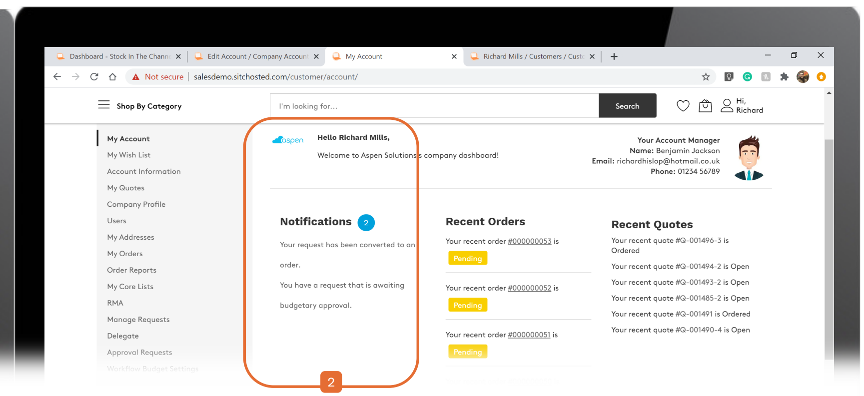
2 These rules can also be set in your customer's **Dashboard** in the **Workflow Budget Settings** tab.

Choose whether approvals must be signed off with each level in the hierarchy **sequence.** Example: a £1000 order must be confirmed by the Approver groups "Up to £100", "Up to £500" and "Up to £1000".

Or, whether purchase requests go **directly** to Approver group of that budgetary level. Example: sent straight to the "Up to £1000" group.

Step 3





When the end-user goes to Checkout, if they are a Requestor they can **Request**. Similarly, if they are an Orderer or Admin – but the value of the basket is greater than their PA Group, they must also **Request**.

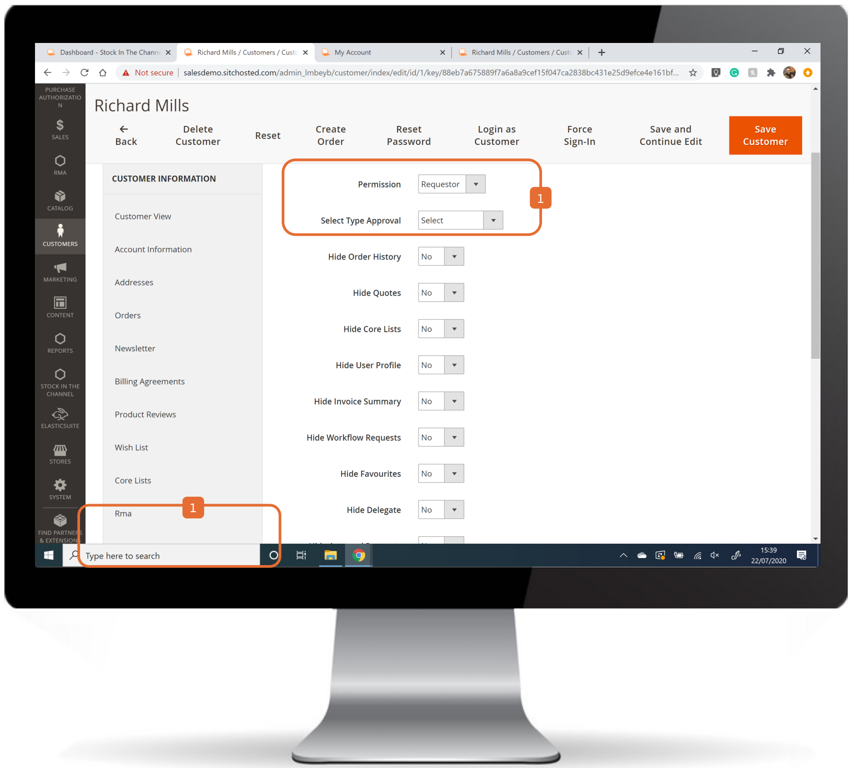
Once a customer has requested an Order, the Approver will receive an email. The Request will also appear in the **Approval Requests** tab. 1

Here Admins and Orderers with the correct permissions can View, Approve, Reject – or Edit – requests.

2 All approvals also appear as notifications on the Dashboard.

NB. Any Groups added, Requests made, or settings changed here will also appear in the Magento back-end (and vice-versa).

Step 4



To set a user up with a Permission, head to the **All Customers** tab in Magento, select the Customer you want and click **Edit**.

1. Navigate to the **Company Role** tab and select the Permission to give.

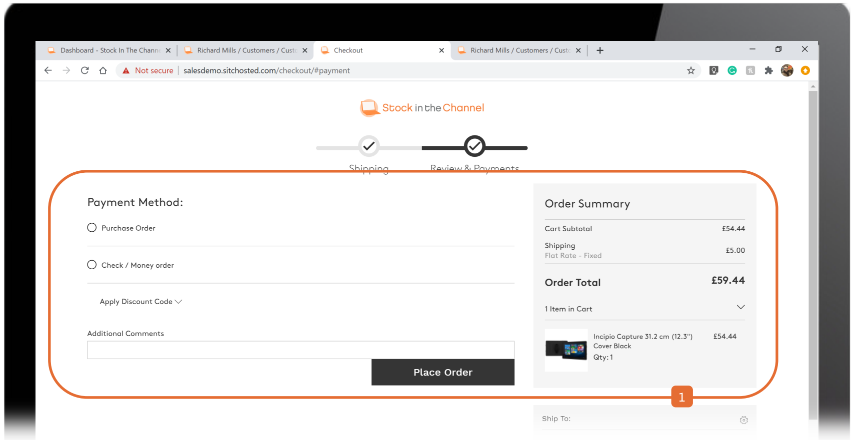
2. If choosing **Requestor**, you will need to se the approval type, most customers set an **Individual User** (i.e. Line Manager or Buyer).

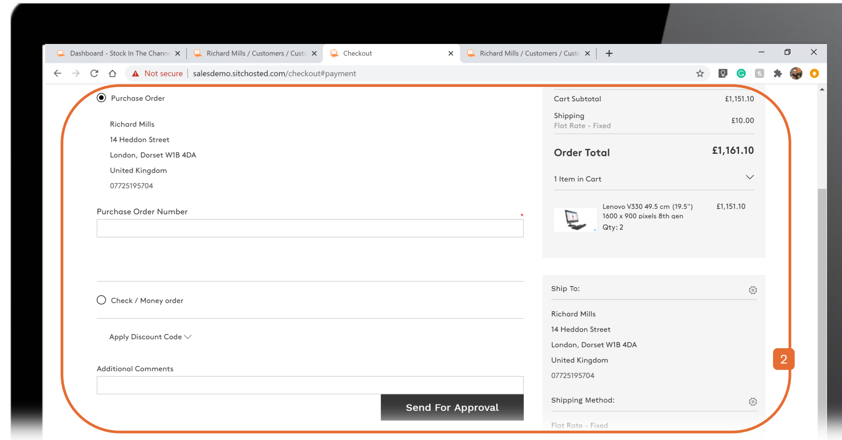
Admins and **Approvers** do not need approval types set.

Then, use the **Budgetory Settings tab** (shown in Step 2) to assign their permissions.

Remember, all these steps can be actioned by your customers on the front-end.

Step 5





In this example, the customer only has Purchase Authorisation up to £100.

1 If they want to purchase this £54.44 tablet case, customers should follow the checkout journey and **can Place Order themselves**.

2 However, if they want to purchase this £575.55 PC they would follow the normal checkout journey, then at the checkout they will be prompted to **Send for Approval**, along with an accompanying note.

Once the Request is Approved it automatically becomes a **Sales Order**.

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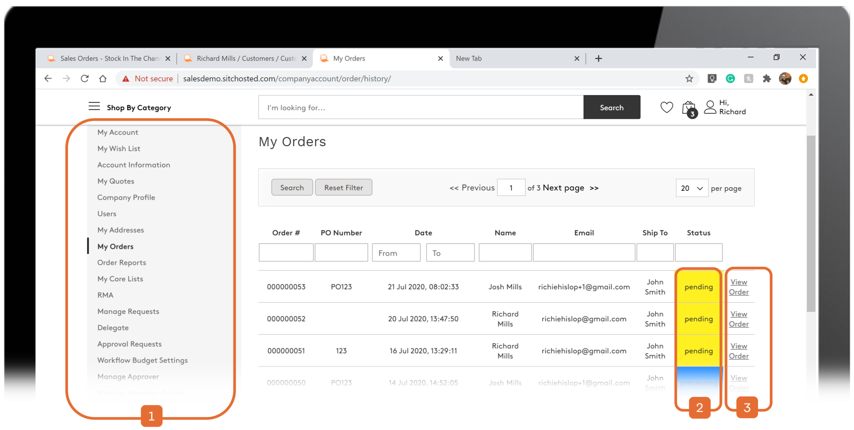
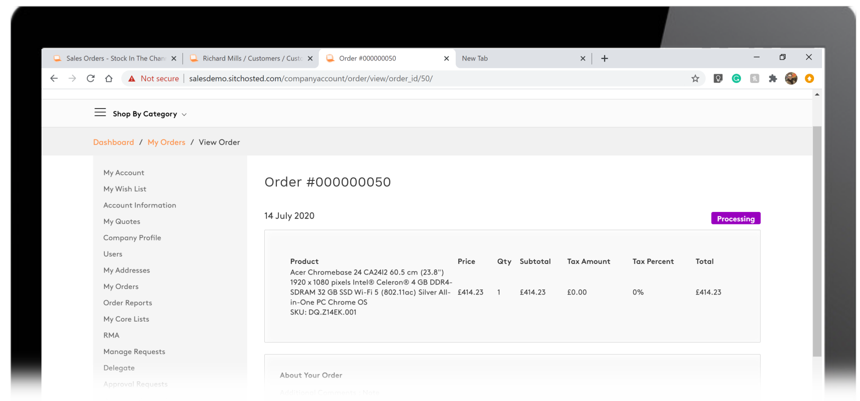
Part 7: Orders

Step 1





Your customer can see their 10 most recent Orders on the webstore Dashboard.

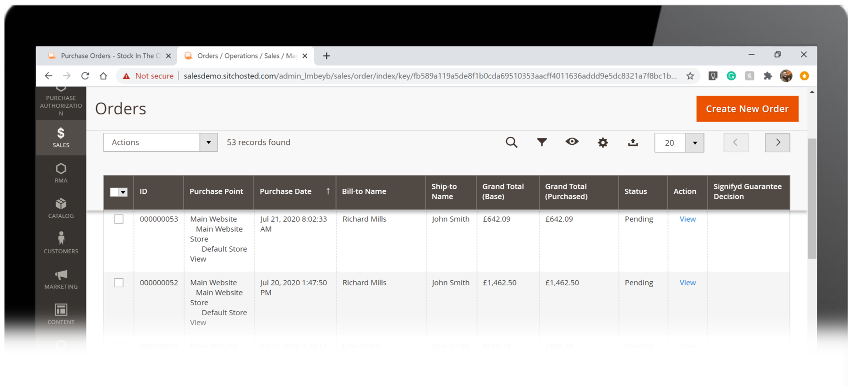
1. All Orders are available within the **My Orders** tab which provides a complete overview.
2. The **Status** of each Order is updated automatically by the Distributor
3. Click **View Order** to see the full details of that individual order.

Processed Orders include the tracking link URL on the Order page, so that your customers can always access this information themselves.

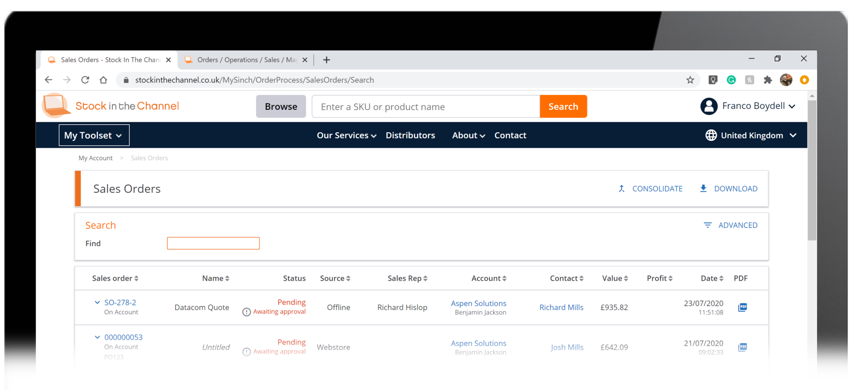
Customers can also **Buy Items Again** directly from the Order summary.

Step 2

1



2



If configured, Orders made on your customer portal are automatically synced to your SINCH Orders Inbox.

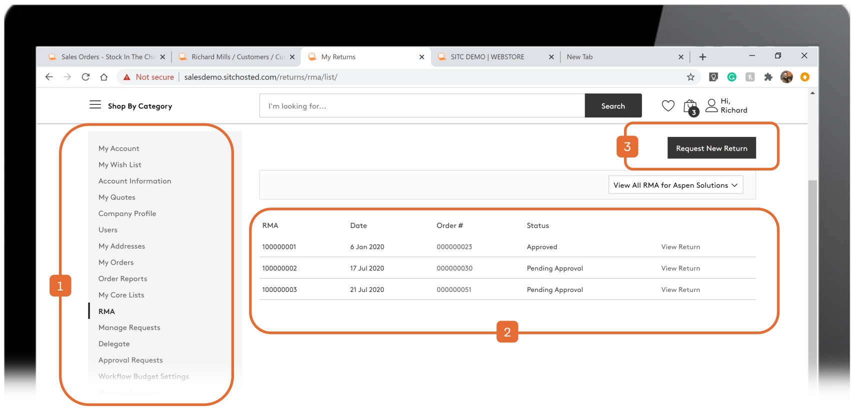
1 While you can also view these on Magento back-end, **we recommend that you manage**
2 **Orders from within your Stock In The Channel account** where you have total control of the Order Process and can convert them into Purchase Orders for onward processing.

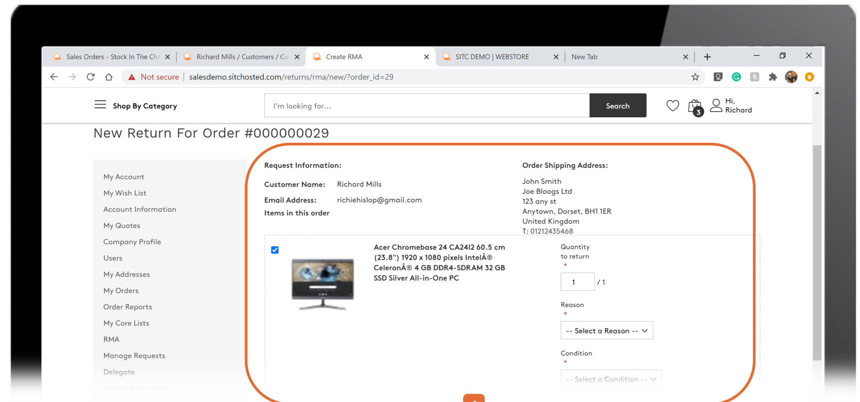
For full information on using SINCH please see Module 5: Completing Purchase Orders.

NB. Customers who do not have Orders synced to their Stock In The Channel account will receive email notifications of the Sales Order.

Part 8:
RMA Returns

Step 1





The RMA module allows customers to handle returns directly from their webstore dashboard.

1 Head to the RMA tab to view previous and
2 pending returns, here customers can
3 **Request New Return** by selecting the relevant Order.

4 Customers can choose to return part of or all the order and provide details of the return – along with a supporting file upload if necessary.

You will receive an email notification when a customer wants to return an item.

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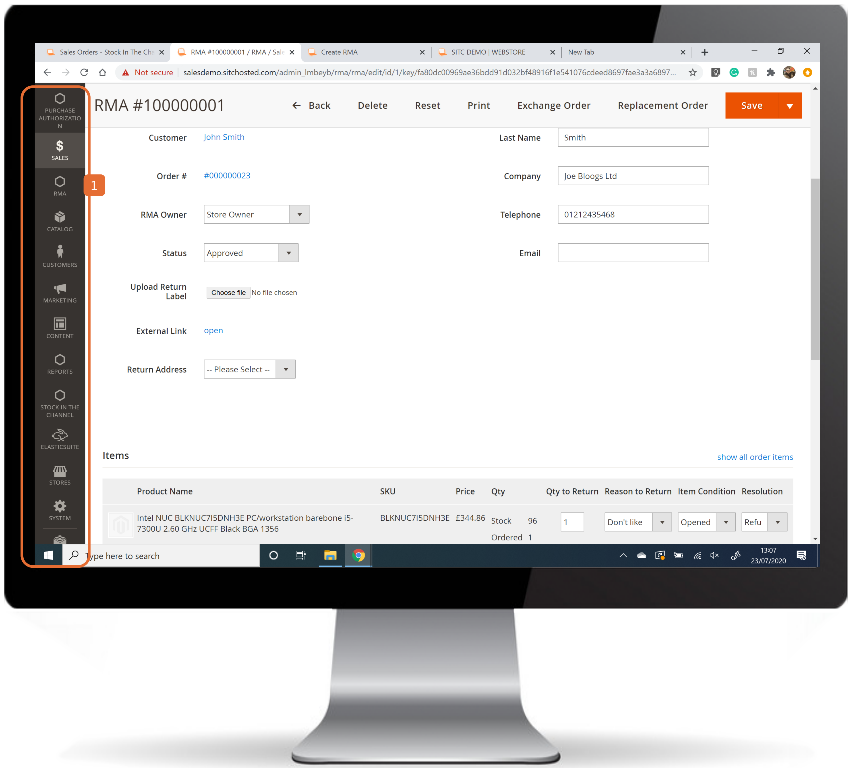
Step 2



Returns will automatically appear within your Magento back-end.

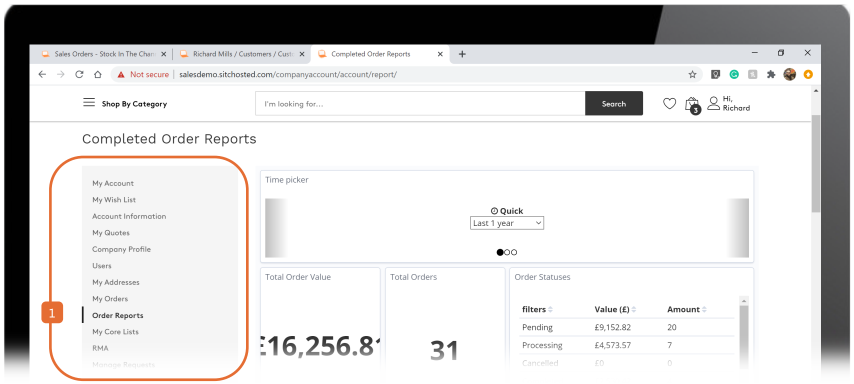
1. To action the Return, head to the RMA tab on your Magento dashboard.

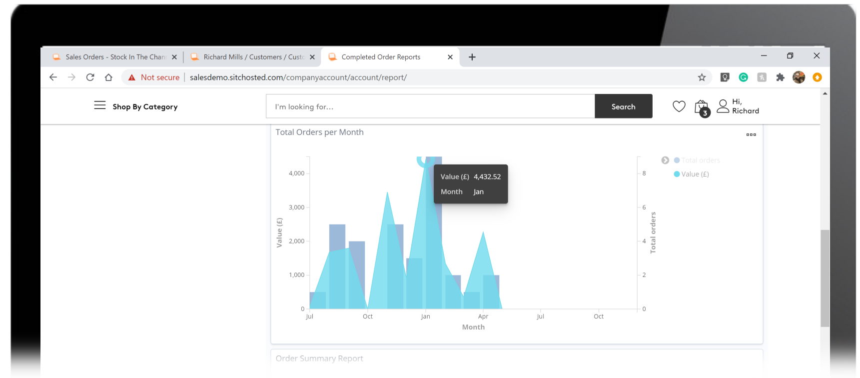
Here you can review, write comments, approve and update the status of any pending returns.

When approved, an RMA packing slip is automatically sent to your customer to print, so your team have full clarity of the Return when it arrives with you.

Part 9: Reports

Step 1





1 Your customers can find a full overview of their completed orders using the Order Reports tab on their dashboard.

Orders are organised by Time Period, Brand, Category or Sales Rep.

Summary and Detail reports display what products have been purchased and by who.

This information can also be downloaded as a raw file.

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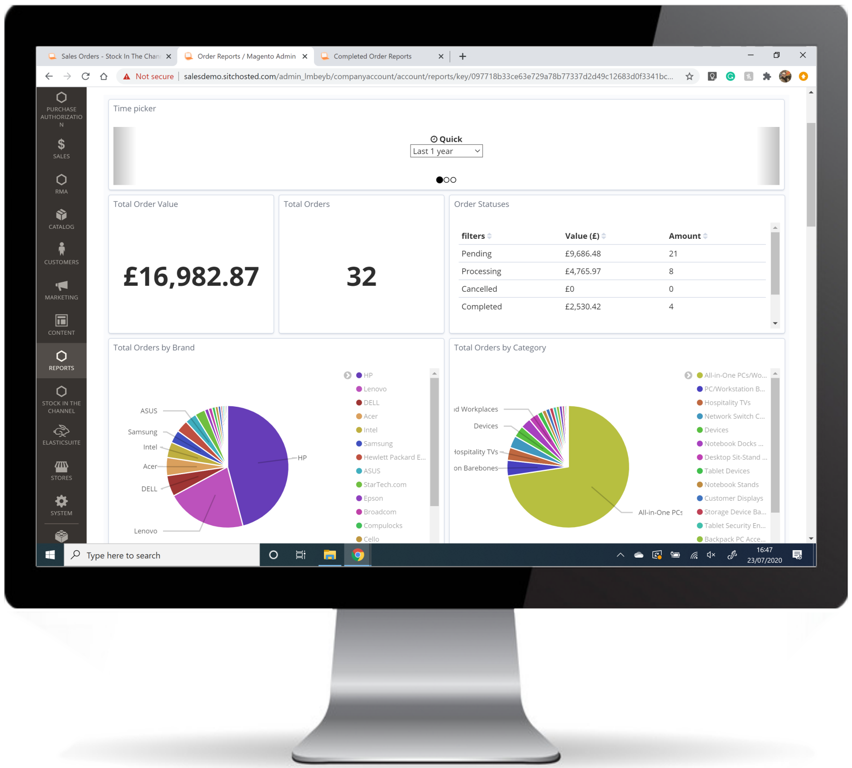
Step 2



All your customer's reports are consolidated in your Magento back-end.

Here you can see the overview of your store's performance, and download as a raw file, too.

Part 10:
Collaborative Quoting

Collaborative Quoting Overview

The Quoting journey can start on Magento, SINCH - or your third-party ERP or CRM.

We recommend that you build Quotes using your SINCH account.

Any quote that you make on your SINCH dashboard will automatically appear on Magento for your customers to review.

There are 3 key Quote Workflows:

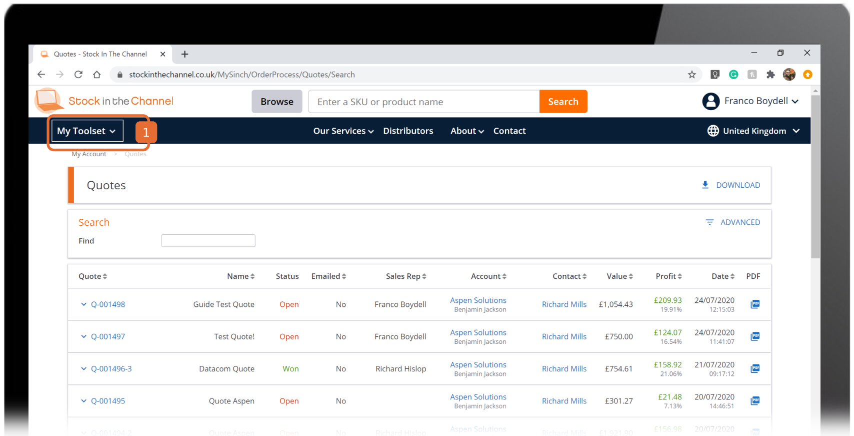
1. Build a Quote in SINCH and send to your customer to review/edit back-and-forth.

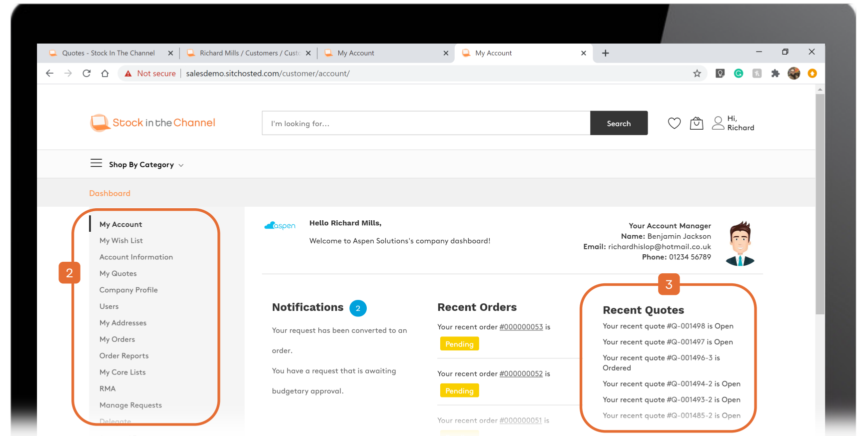
2. Your customer can request a Quote in Magento, to be reviewed/edited by their account manager on SINCH.

3. Quotes created in an external system can be synced to SINCH and Magento.

NB. This Guide demonstrates Quote Workflow 1 to show the Collaborative Quoting tool from start to finish.

Step 1





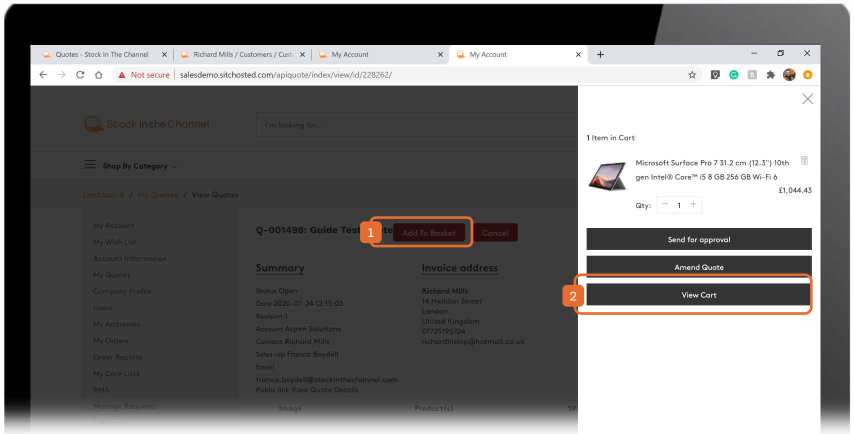
To build a fresh Quote to send to your customer, start from the Quotes page using **My Toolset** in your SINCH account.

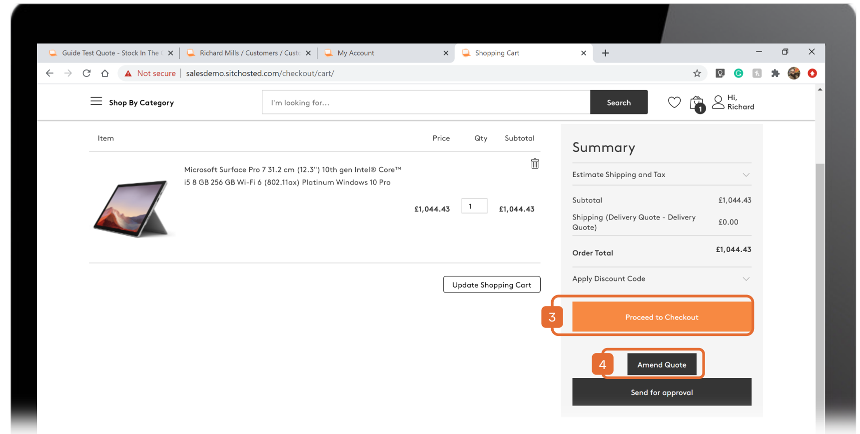
For a full explanation of Quoting using Stock In The Channel please refer to Module 4: Using the Quote Tool.

Your customers can see the same list of Quotes on the front-end of the customer portal.

Recent Quotes can be quickly accessed through the Dashboard, or the full list can be seen within **My Quotes** tab.

Step 2





1 Customers can **View Quote** to review the details by line item in order to **Add To Cart**.

2 Customers can add the items to basket, and then **View Cart**.

If customers changes items in the basket, the price will revert to their store price.

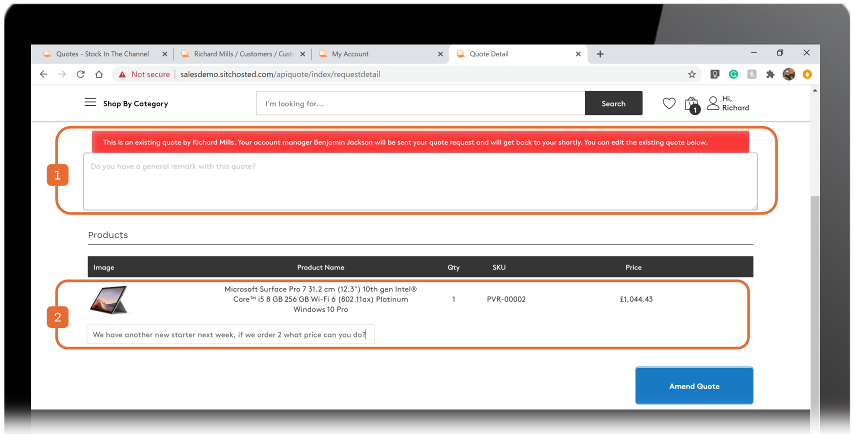
At this point the client has two options:

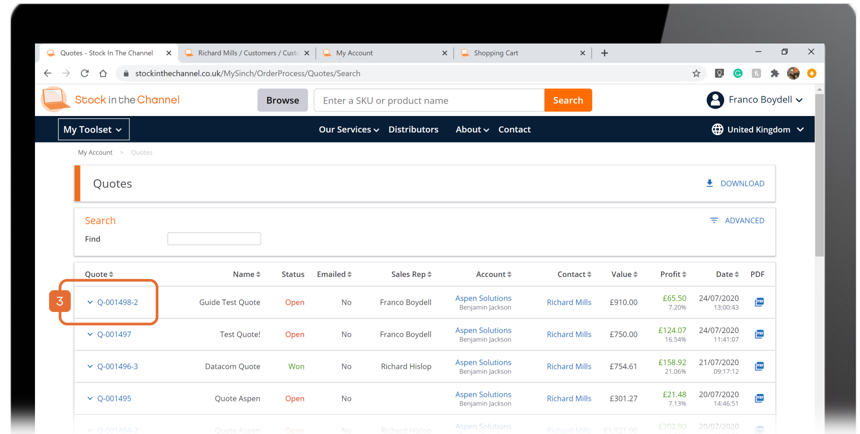
3 1. **Proceed to checkout** to purchase the items at the quoted price.
2. Collaborate on the Quote by adding remarks to line items.

4 Click **Amend Quote** to add remarks.

NB. Only you can edit prices.

Step 3





1 Customers can write **general remarks** or
2 **notes on specific items.**

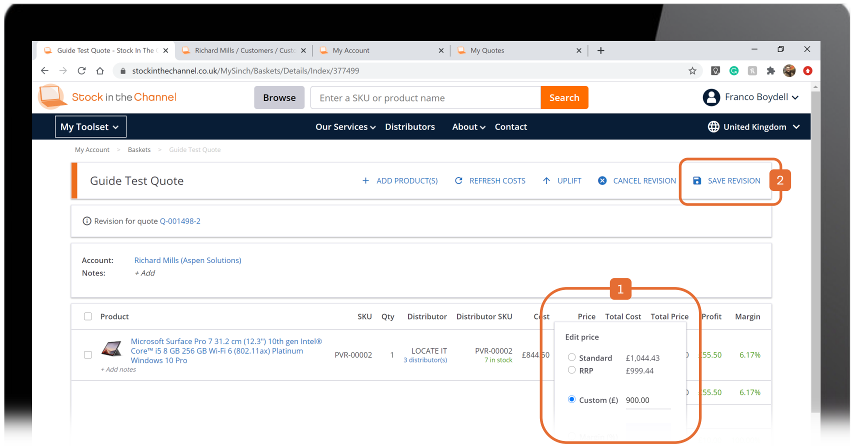
Example: We have another new starter next week, if we order 2 what price can you do?

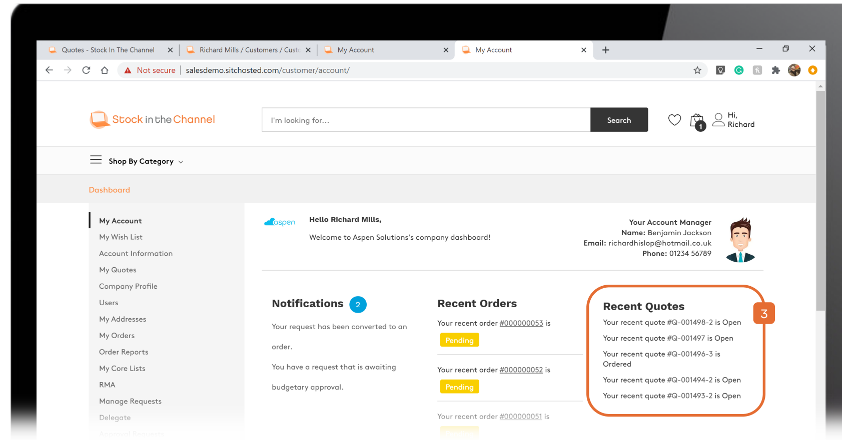
After clicking Amend Quote, these notes will appear live on your SINCH account Quotes, for you to see and review.

3 In your list of Quotes you'll see a new Quote with the same Quote ID with a suffix of '-2' to signify a revision. This will continue (-3, -4...) until the Quote is Won, meaning you retain a full history of the Quote process.

Click on the updated line item to revise the Quote.

Step 4





1 Click **Edit** and make revisions to the Prices as you feel appropriate.

2 Click SAVE REVISION to send the Quote back to Magento for your customer to approve.

3 The revised Quote will now be available for you customer on the Dashboard.

The customer can now Purchase as normal - or request further changes to the quote.

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Part 11: PunchOut

PunchOut Overview

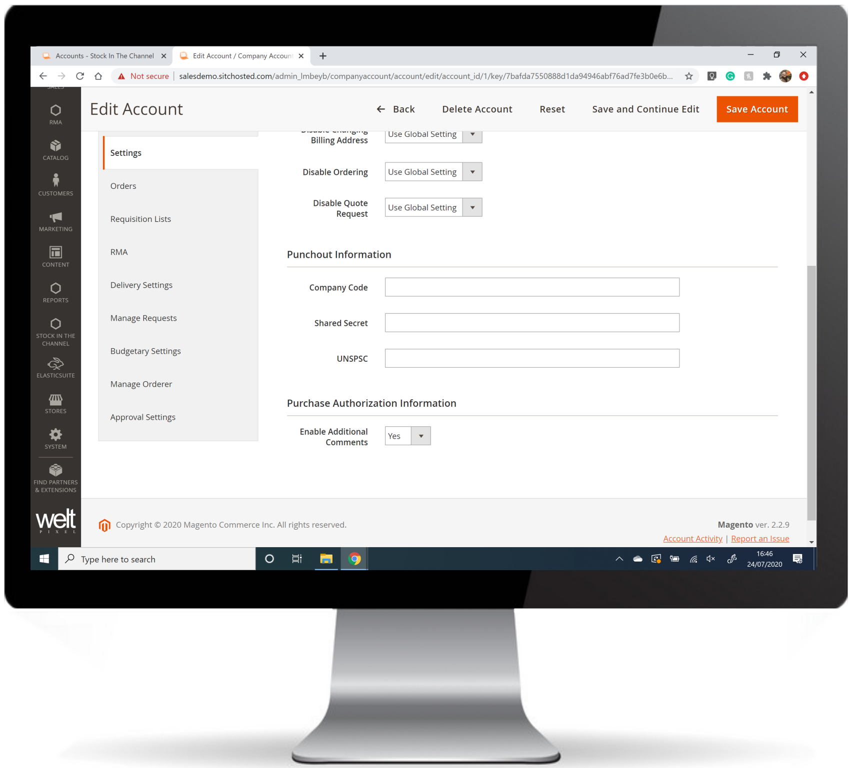
PunchOut enables your customers to access your catalogue from within their own procurement systems, such as Ariba or Oracle. Note, this can be a customer-specific catalog.

There are two types of PunchOut:

Catalogue Only
Lets customers single sign-on to Magento from within their system (using your Code and Shared Secret) to use your webstore as a catalog. Customers can add items to the basket then click ‘PunchOut’. The contents get sent to the system they have logged in from, and they will go through their normal system procurement process.

Purchase Order
After the customer ‘punches out’ from their catalogues and they have completed their internal procurement/purchase approval, when they click “Confirm” within their system it will populate Magento with a Sales Order which will then be passed to Stock In The Channel in the normal way.

Step 1



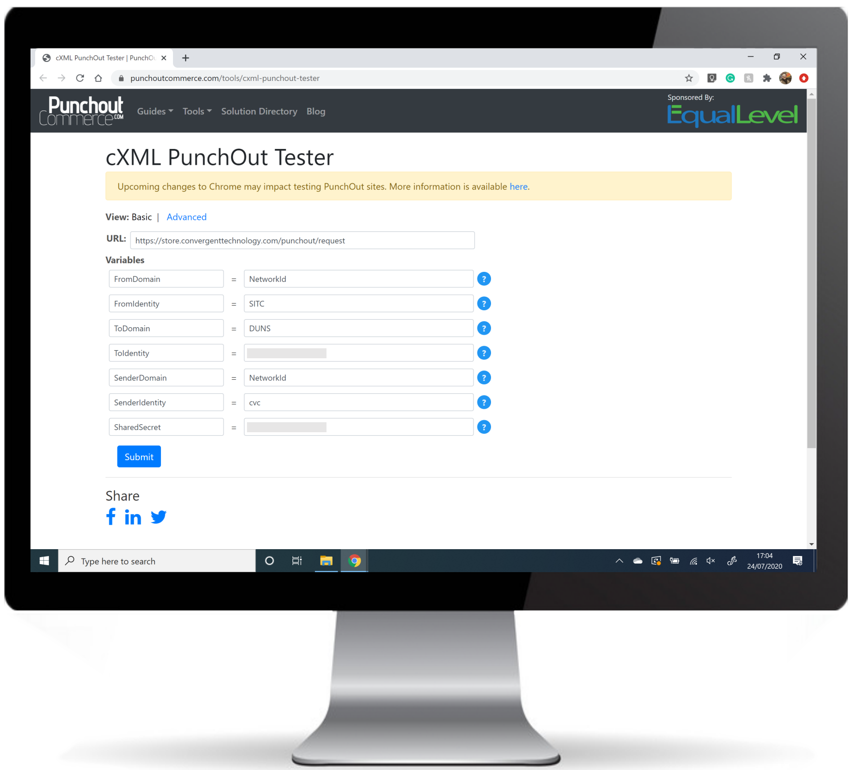
First, please make sure that the PunchOut module is enabled on your B2B store. Contact your SINCH account manager to do this for you.

Next, ensure the customer exists within Stock In The Channel and make sure the catalogue and pricing is set correctly for the client.

Then speak to your Account Manager who will provide you with PunchOut API details to pass to your customer.

NB. The next steps use an example PunchOut system, which will be different to your customers.

Step 2



Customers should open their procurement system and input the credentials you have passed to them.

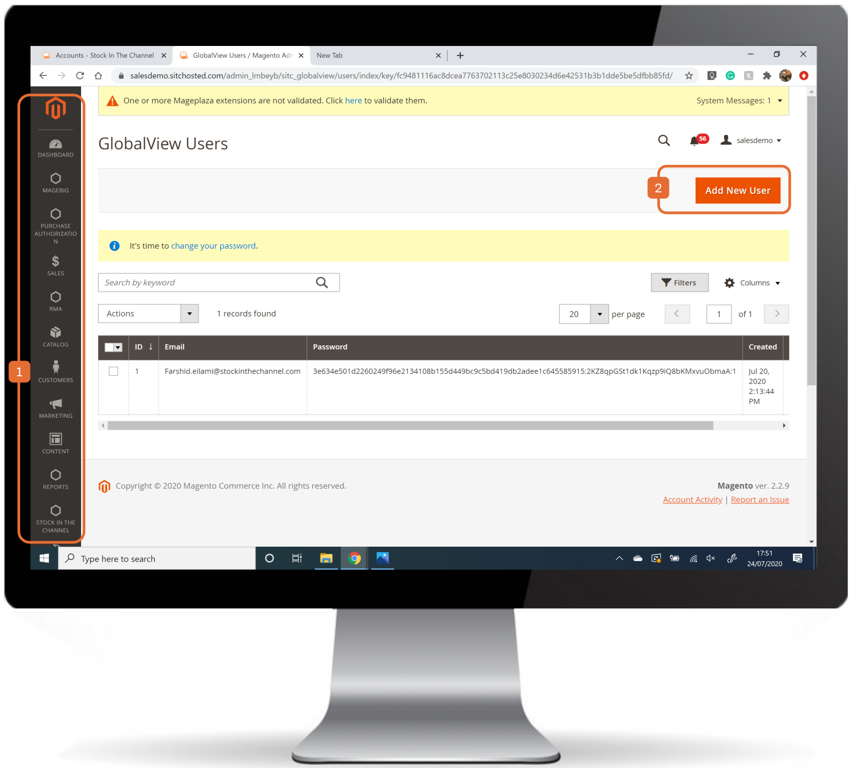
After clicking Submit they'll be taken to your Magento webstore as a guest user.

These customers can then browse the catalogue and fill a basket before punching back out to their own system.

If your Customer has PunchOut Purchase Order enabled, they are then able to push Orders back into Magento which are then processed from within Stock In The Channel.

Part 12:
Global View

Step 1



Usually, each Contact is only linked to one Account (typically the company they work within) using a unique email address.

However, there are cases where one Contact will need to make Orders on behalf of multiple Accounts – while using the same email address.

To solve this we created Global Users.

NB. These must be created within Magento, not on Stock In The Channel

1. Navigate to **Customers → Global View Users.**
2. Select **Add New User.**

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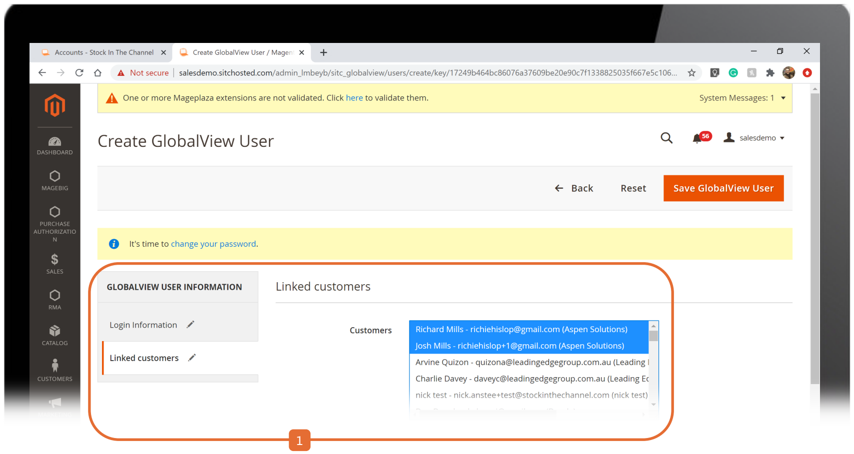
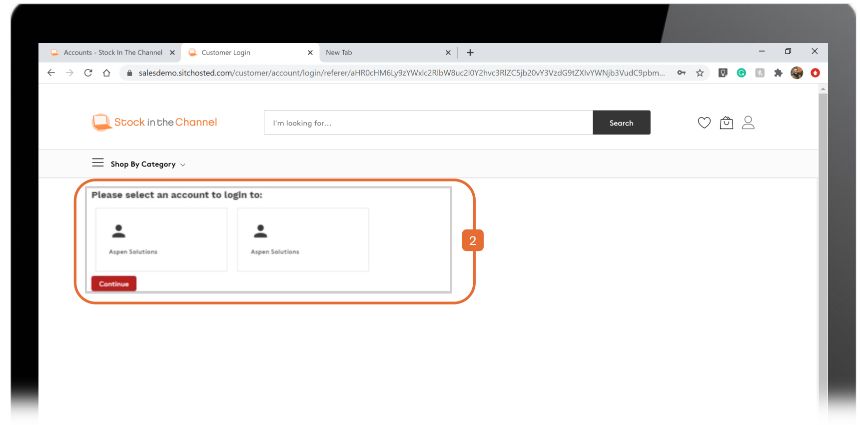
Step 2





1 Complete the Contact's Login information, then use the **Linked customers** tab to select the Accounts you want to give this user access to.

You can select as many customers as is necessary. The Global View User can now log in as any of these Contacts to make Orders in Magento.

2 Now, when this User signs into the webstore, they will be asked which Account they wish to log into.

Stock in the Channel

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Thank you

You’re have now completed the core **Modern Selling How-To-Guides.**

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.