

The logo for 'eratex' features a 3D orange 'e', a green 'r', and blue 'atex' in a bold sans-serif font.

**eratex**

**AND ORDER FULFILLMENT  
PROCEDURAL GUIDE**

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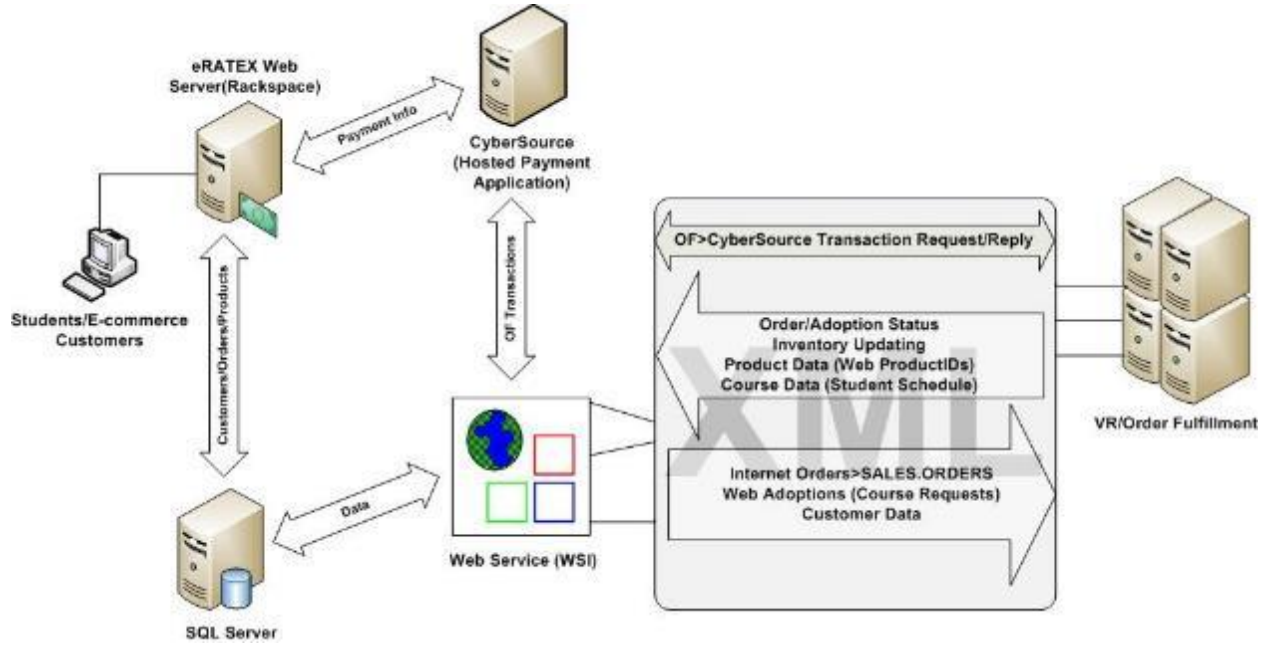
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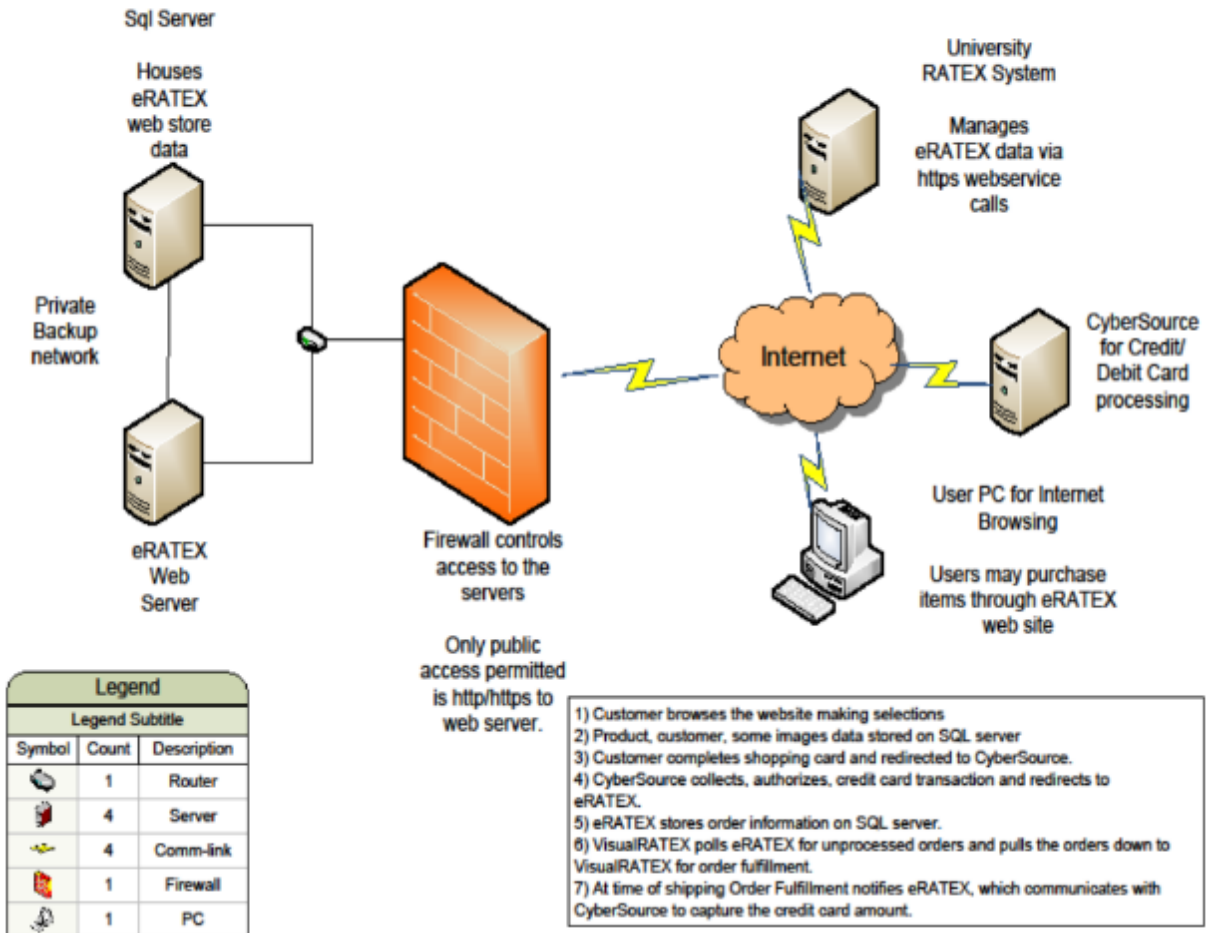
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# INTEGRATION/PROCESS FLOW CHARTS



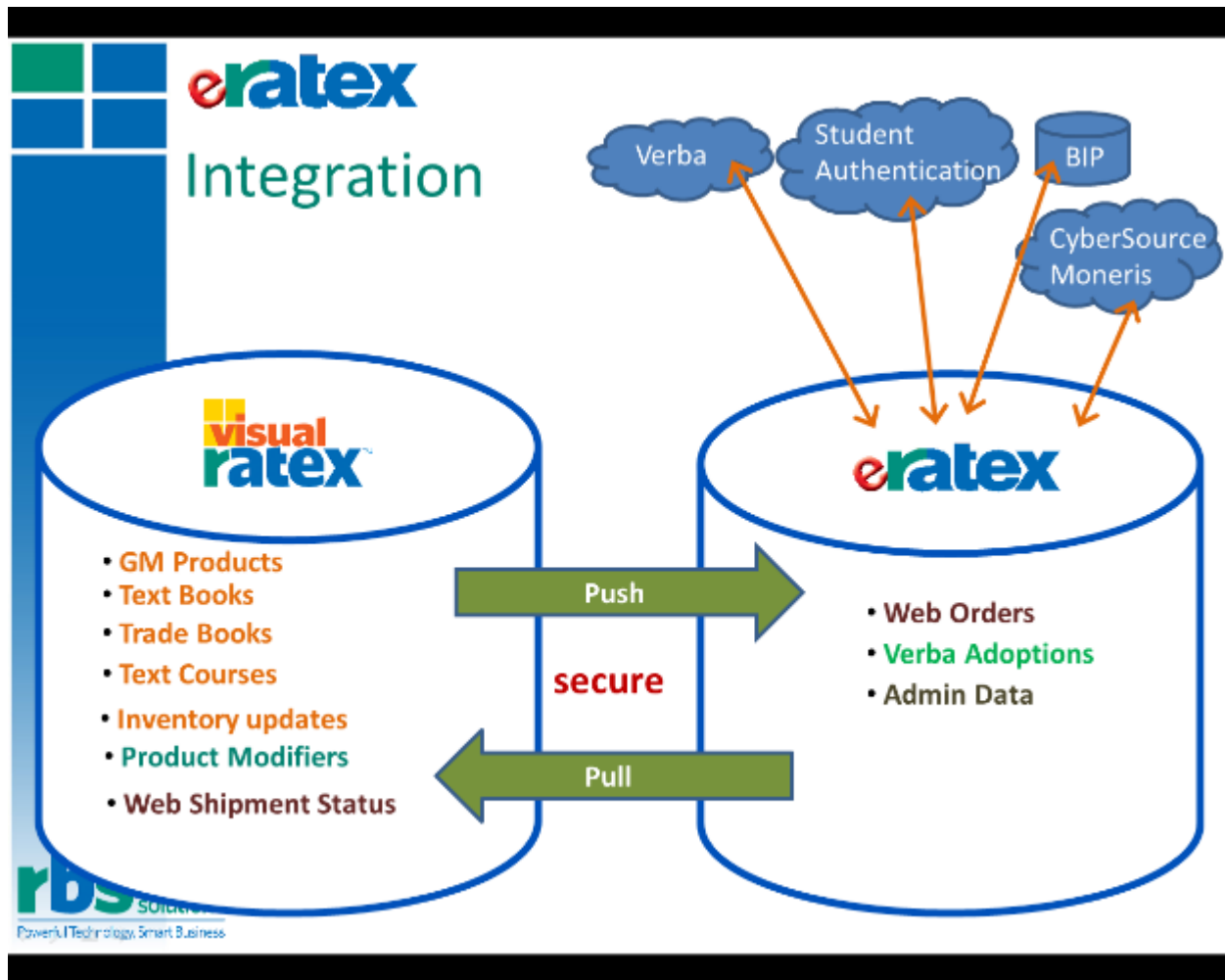
## eRATEX Connection Overview





# INTEGRATION OVERVIEW

Data is passed to and from VisualRATEX and eRATEX through a powerful XML-written integration process. There are two integration types: an upload processor (web update) and a download processor (web download). Products (General Merchandise, Textbooks/Courses, Tradebooks), inventory updates, modifiers (i.e. a price change, title change, author change, etc.), and order status updates are sent from VisualRATEX to eRATEX via web update; web orders and adoptions are sent from eRATEX to VisualRATEX via web download.



The integration process looks at an AV.PARAMETER file called WEB.UPDATE to send product data to eRATEX. AV.PARAMETER WEB.UPDATE is configured with file and attribute names; whenever an attribute in the list is modified, an update is sent to eRATEX with the change:

VisualRATEX - AvParameter Maintenance

Record Edit Help

WEB.UPDATE

**\* Description** The category of update is listed under Information and is enabled by making the respective value under Data1 Y. The respective fields that will trigger an update are listed under Data2 and the corresponding field numbers are listed under Data3. The corresponding priority for the update is listed under Data4. Data 5 is set to S if sub class is to be used for GM and M if master class is to be used.

\* Type S System administrator can modify \* Account A All accounts Date Modified 09/02/09

Information	Data1	Data2	Data3	Data4	Data 5
CD.DEPARTMENT	Y	NAME	1	11	M
CD.TX.CAMPUS	Y	NAME	1	11	
CD.TX.TERM	Y	NAME	1	11	
CO.SXRF	Y	TMF.LINKüSTORE...	1ü6ü19ü20ü21ü22	9	
GM.GMF	Y	MANUFACTUREüP...	6ü7ü10ü15ü57ü2...	5	
GM.SMF	Y	RETAILüON.HAND...	2ü3ü57ü58ü62	5	
GM.WEB	Y	SHORT.DESCRIPüT...	1ü2ü3ü4ü5ü6ü7ü...	5	
POS.GST	Y	ISSUED.AMTüRED...	3ü6ü11ü14	2	
SALES.ORDER	Y	PRODUCTüSKUüQ...	79ü104ü85ü90ü1...	1	
SHIPMENT	Y	TRACKING.NUMBE...	46ü47ü48ü51	1	
TR.SMF	Y	TOT.STOCKüONLI...	14ü53ü54ü56	6	
TR.TMF	Y	AUTHORüTITLEüL...	3ü4ü6ü7ü8ü14ü1...	6	
TX.CEF	Y	ENROLLMENTüMA...	2ü7ü19	8	
TX.CRF	Y	REQUEST.FLAGüL...	3ü4ü20ü26	8	
TX.PCRF	Y	STATUS	12	10	
TX.SMF	Y	NEW.RETAILüUSE...	2ü3ü27ü28ü79ü8...	7	
TX.TMF	Y	AUTHORüTITLEüP...	3ü4ü5ü7ü8ü9ü13...	7	

14 jksobonya:RBS037 Required AV.PARAMETER.MNT Sec1 Line1 A textual description of the purpose and use of this particular parameter. This infor...

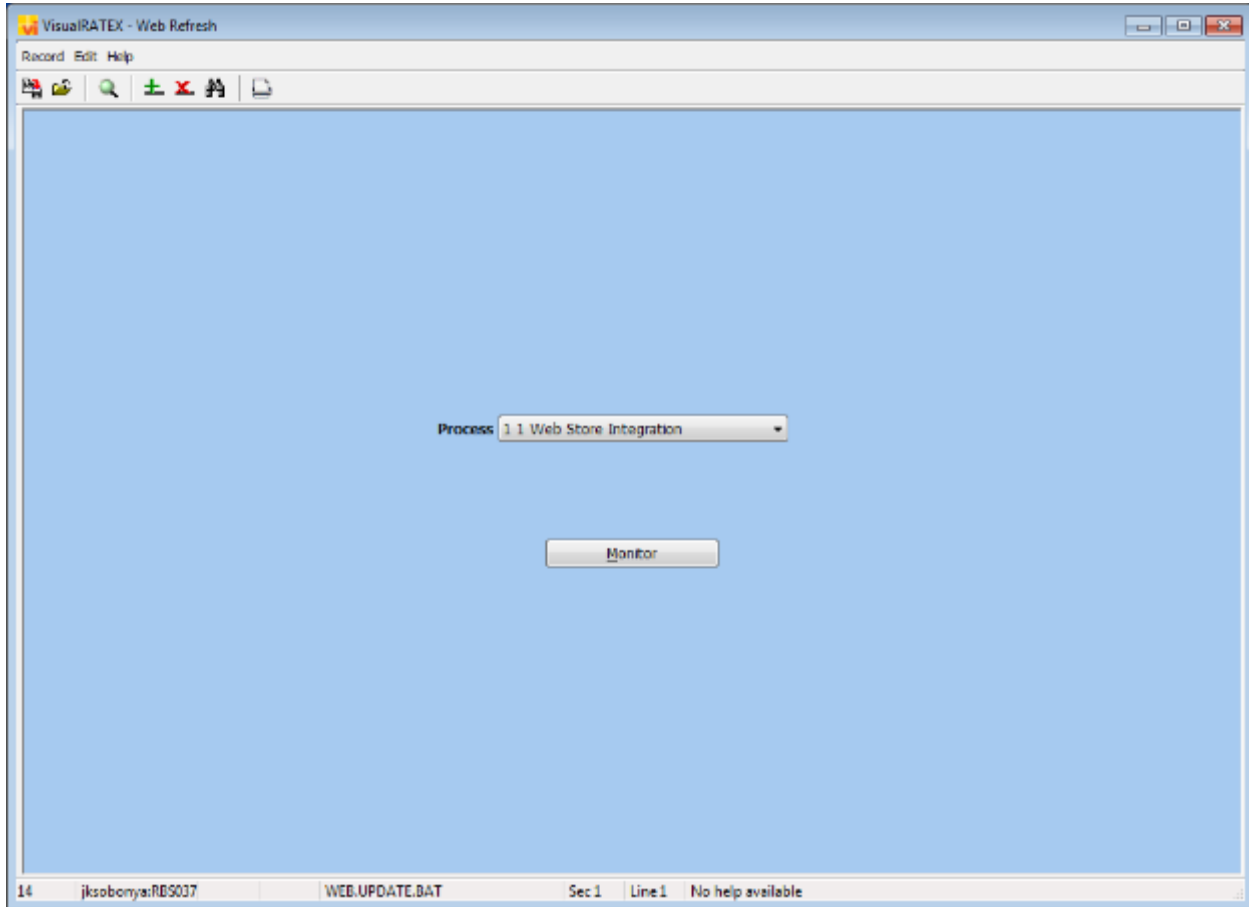
AV.PARAMETER.MNT

AvParameter Maintenance screen, WEB.UPDATE

Attributes in this screen should NOT be modified by a VisualRATEX user; this screen is shown for informational purposes only.

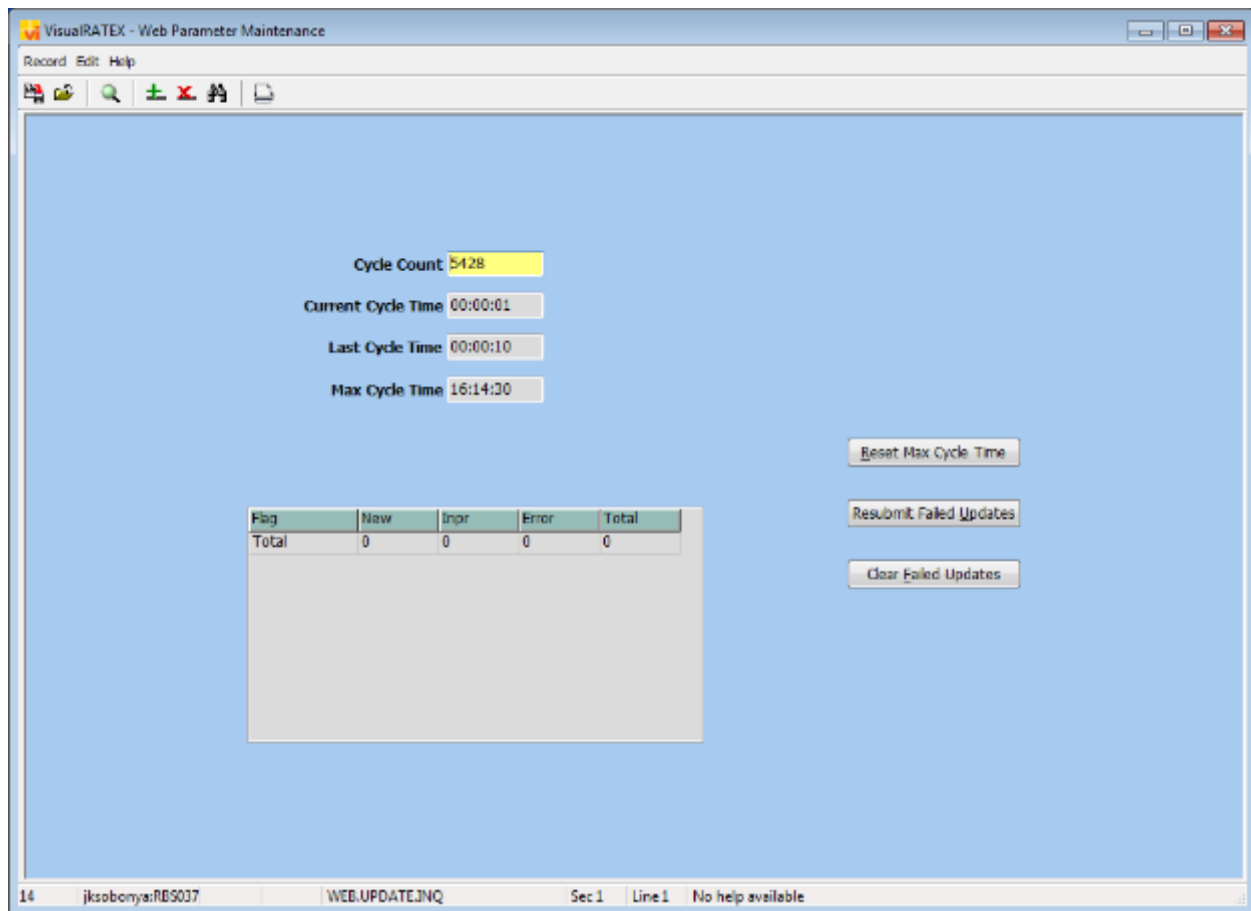
## WEB UPDATE

The web update processor can be monitored any time in VisualRATEX by going to the following menu path: Admin > Web Store > Web Update.



*WEB.UPDATE.BAT  
Web Update screen*

Select the store number and click Monitor:



*WEB.UPDATE.INQ  
Web Update screen*

In this screen, data can be monitored as it is being uploaded to eRATEX. The grid shows how many updates are new, how many are in process, how many errored, and the total number of updates. The Flag column will display an abbreviation of what is being uploaded:

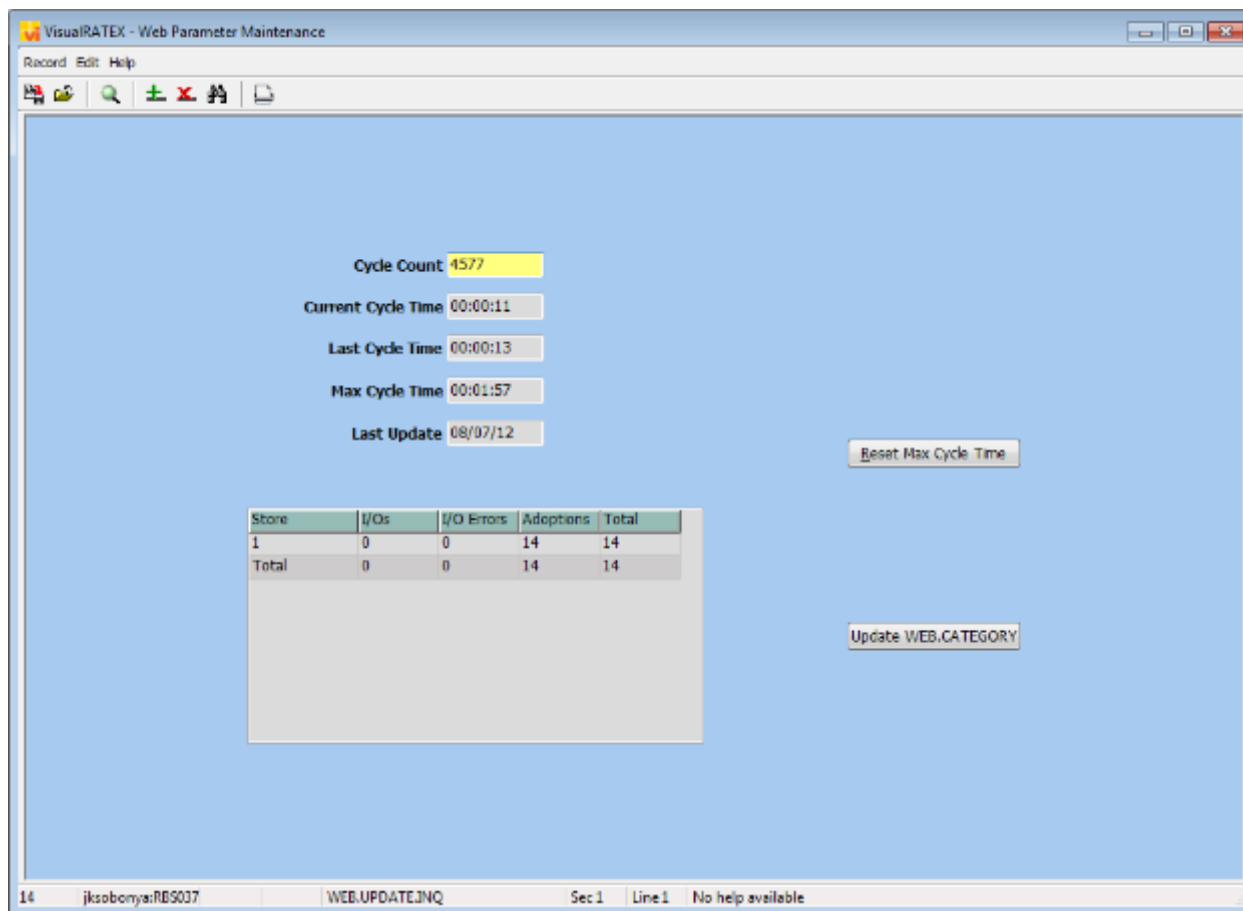
- GC - Gift Card record
- GM - GM record
- SO - Sales Order record (order updates)
- TR - Tradebook record
- TX - Textbook record
- WC - Web Course record
- WE - Web Enrollment record
- WR – Web Rule record

If a record fails to load to the site, click the Resubmit Failed Updates button to resend it to the site. To clear failed records, click Cleared Failed Updates.

If the processor does not appear to be running, you can restart the processor in the VR Scheduler. [Please contact RBS](#) if you feel that your processor is having performance issues.

## WEB DOWNLOAD

From the Web Update screen, select Web Download and click Monitor:



*WEB.UPDATE.INQ  
Web Download screen*

In this screen, data can be monitored as it is being downloaded from eRATEX. The number of internet orders and Verba adoptions (pending course requests) that were downloaded display in the grid.

**I/O Errors** are internet orders that did not convert to sales orders and are stuck in Internet Order Processing. As these internet orders are either converted or canceled, the I/O Error count will decrease.

Click **Update WEB.CATEGORY** to download your category structure to VisualRATEX. The **Last Update** field is populated with the date the category structure was last downloaded.

Once downloaded, category web rules can be created; GM products can be linked to additional categories, and those items will load to eRATEX with that category association.

## MULTI-STORE FUNCTIONALITY

Multi-store functionality is available with eRATEX and Order Fulfillment in the 37A .18 release of VisualRATEX. Multi-store functionality allows the bookstore to create web products in different stores in VisualRATEX and have those products available to purchase on one eRATEX web site. Also, the functionality allows web products to be fulfilled from multiple stores in Order Fulfillment.

Multi-store requires specific parameter setup in VisualRATEX, which is explained in the next section.

## GUIDELINES/PREREQUISITES

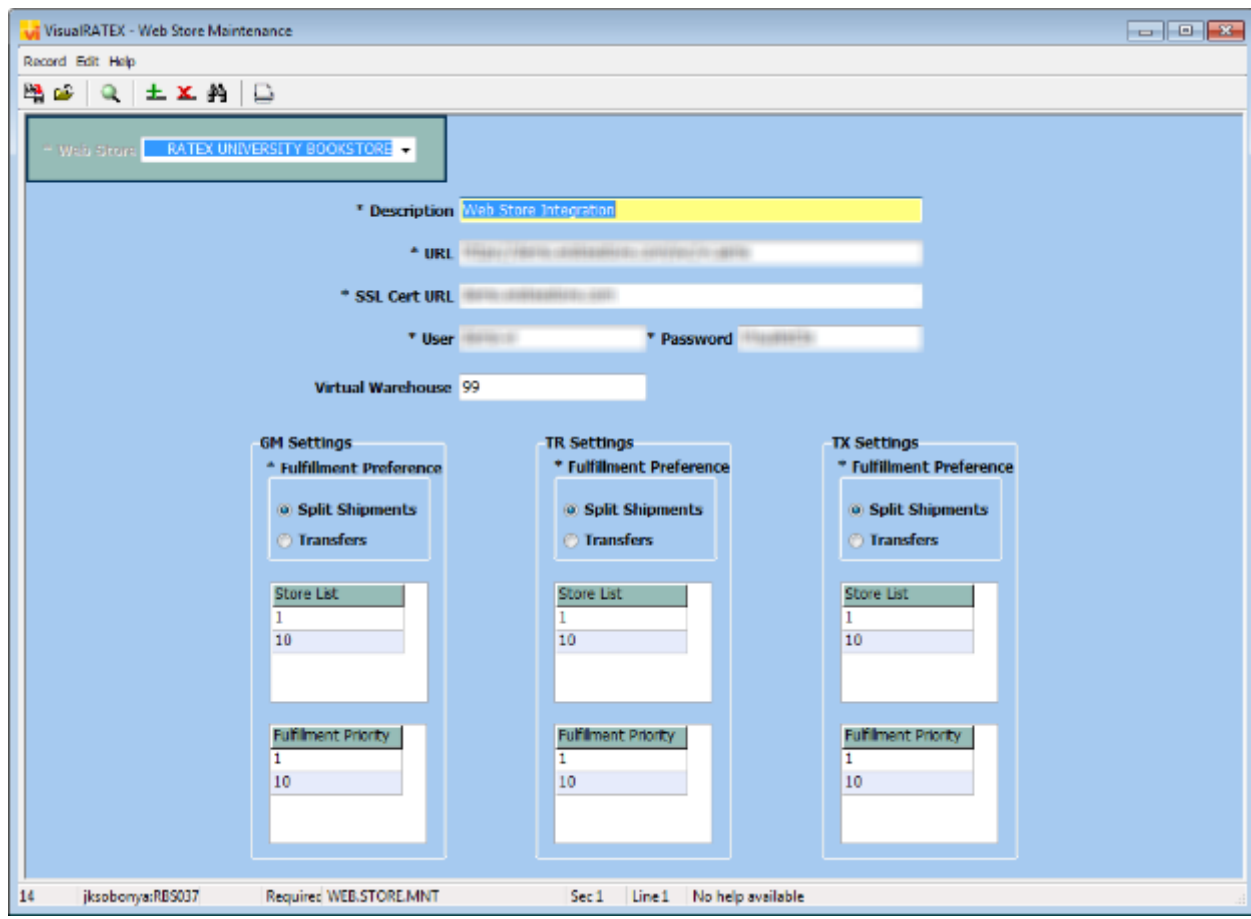
**IMPORTANT!** In order to use the multi-store functionality, these guidelines/prerequisites **MUST** be followed:

- **All web products must have the SAME price across ALL stores. This includes promotional pricing (PCDs) and rental pricing.** One eRATEX site can support one product record with one price; multiple prices by store cannot be supported on one eRATEX site. IF a product in VisualRATEX had price A in store 1 and price B in store 2, the price that is updated last will be sent to eRATEX and displayed on the site.
- **Course requests MUST be unique across ALL stores.** Courses with the exact same term/campus/dept/course/section, but a different store, cannot be supported on one eRATEX site because the data will be overwritten. Courses with different campuses or different sections (etc.) will display on the courselistbuilder page without issue.
- **Shipping methods MUST be used across ALL stores.** One eRATEX web site offers one set of shipping methods during checkout. Each shipping method must be available to use in every store selling products on eRATEX.

If the above guidelines can be followed, multi-store can be set up and used in eRATEX and Order Fulfillment.

## PARAMETER SETUP

To send web products from multiple stores to eRATEX, and to fulfill web products from multiple stores in Order Fulfillment, specific parameters must be defined in Web Store Maintenance. To access this screen, click Admin > Web Store > Web Store Maintenance in VisualRATEX. The following screen will appear:



WEB.STORE.MNT  
Webstore Maintenance screen

This screen has been modified in 37A .18 to include several parameters for multi-store use. Each parameter is described in detail below. By default, the store lists and fulfillment priority lists will be pre-populated with your integration store (for example, store 1) so the integration will continue to work seamlessly with eRATEX. The bookstore can change the fulfillment preferences described below at their discretion.

Virtual Warehouse -- This field should be pre-populated with "99"; it should NOT be changed to a different store and it should NOT be blank. If this field is blank, enter "99." For more information about the virtual warehouse, please see box.

**What is a Virtual Warehouse, and why is it “99”?**

During the internet order to sales order (IO to SO) conversion, all products on the order are validated in VisualRATEX to ensure the products exist in the system. If the products do not exist in VisualRATEX, the internet order will not convert to a sales order.

One of the validation checks is “store.” The IO to SO process checks to see if the product exists in the same store as the web store (i.e. if the web store is 1, the product must exist in store 1). If this criteria is met, the internet order converts to a sales order. Internet orders can only convert to sales orders if the item exists in the web store.

This presents a unique challenge with the multi-store logic, because products can potentially exist in number of different stores (2, 3, 4, etc.), not the web store (1). The internet orders would fail to convert to sales orders because they would not pass the “store” check. This is where the “Virtual Warehouse” comes in. All products on internet orders are temporarily assigned a “Virtual Warehouse” of “99”. This allows the internet orders to pass the “store” check and continue the conversion process. Once the internet orders are converted to sales orders, the virtual warehouse is dropped, the products are reassigned to the appropriate store, the inventory is committed, and the orders are ready to pick.

GM Settings/TR Settings/TX Settings -- Multi-store preferences can be set by module. The bookstore may want general merchandise products to be sent to eRATEX or fulfilled by Order Fulfillment using a different set of stores than textbooks, or tradebooks.

Fulfillment Preference -- The Fulfillment Preference is an indication of how items on sales orders will be fulfilled. Make a selection for each module. There are two options: split shipments or transfers.

Split Shipments -- If split shipments is selected as the fulfillment preference, items will be fulfilled based on the inventory in the stores in the fulfillment priority store list. If an item cannot be fulfilled by the first fulfillment priority store, it will be put onto a separate shipment to be fulfilled by a subsequent fulfillment priority store, whichever store has adequate inventory to fulfill the items on the subsequent shipment. If adequate inventory is not available, the shipment will not be pickable.

Transfers -- If transfers is selected as the fulfillment preference, all items will be fulfilled out of the eRATEX integration store (i.e., the store your web site is integrated with). If inventory is not available in the eRATEX integration store, inventory will be evaluated in the fulfillment priority store list. If adequate inventory is available in a fulfillment priority store, a pending transfer record will be created to transfer stock from the subsequent fulfillment priority store to the eRATEX integration store. Once the transfer has been fulfilled, the order will become pickable. If adequate inventory is not available, the shipment will not be pickable.



Store List - This is a list of stores used to send web product data from VisualRATEX to eRATEX via web update records. By default, the store lists will show the eRATEX integration store; additional stores can be added by pressing F4 and adding the store number. If a product exists in multiple stores, the inventory from each store will be summed on eRATEX. If web product data was created prior to the addition of a store, the web product data (GM/TR/TX) will need to be **refreshed** to eRATEX. Future additions/updates/deletions will be sent to eRATEX automatically via the integration. Removing a store from the store list will stop any web update records from being created for web products within that store; removing a store will not remove that store's web product data from eRATEX.

Fulfillment Priority - This is a list of stores used to fulfill items (GM/TR/TX) on sales orders. By default, the fulfillment priority lists will show the eRATEX integration store as the primary fulfillment store; additional stores can be added by pressing F4 and adding the store number. The first store in the list is the main fulfillment priority store; it is evaluated first to see if adequate inventory is available to fulfill the items on a sales order. Depending on whether split shipments or transfers is selected as the fulfillment preference, if inventory is not available in the first store, the second store in the list is checked, then the third store is checked, and so on; a split shipment will occur or a pending transfer will be created if adequate inventory is available. Removing a store from the fulfillment priority list will remove it as a fulfillment option for items on sales orders.

Once this information is properly defined, web product data will be uploaded to eRATEX or downloaded to Order Fulfillment. Please see [the Order Fulfillment section](#) for information regarding how to fulfill sales orders from multiple stores.

The next section describes how to create and maintain web product data.

## **WEB PRODUCT DATA CREATION AND MAINTENANCE**

Web product data must be created in VisualRATEX before it can be displayed on eRATEX. Once created properly, it will be uploaded to eRATEX through the integration process described above.

Not all data is created or processed the same way. The following section will describe three main areas where data needs to be created and maintained for eRATEX: General Merchandise, Trade, and Text (including courses and adoptions).

### **GENERAL MERCHANDISE (GM)**

General Merchandise (GM) can be a large part of an eRATEX web site. Apparel, University memorabilia, gifts, and class supplies are just a few product areas to consider adding to eRATEX. GM items can be added to eRATEX by creating SKUs in SKU Maintenance, and associating those SKUs with a Web ID.

## SKUs

---

Every GM product must be created in SKU Maintenance. Important fields to enter for each SKU are the SKU description, class, manufacturer, vendor, size, color, store, price, and weight. If a product has multiple variations, the color and size must be uniquely defined for each SKU.

Once the SKUs have been created, they must be associated with a unique Webstore Product ID (Web ID).

## WEB IDs

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Every GM product needs a unique Webstore Product ID associated with it. Webstore Product IDs can be created one of two ways: in SKU Maintenance or in Web Store Product Maintenance.

## SKU MAINTENANCE

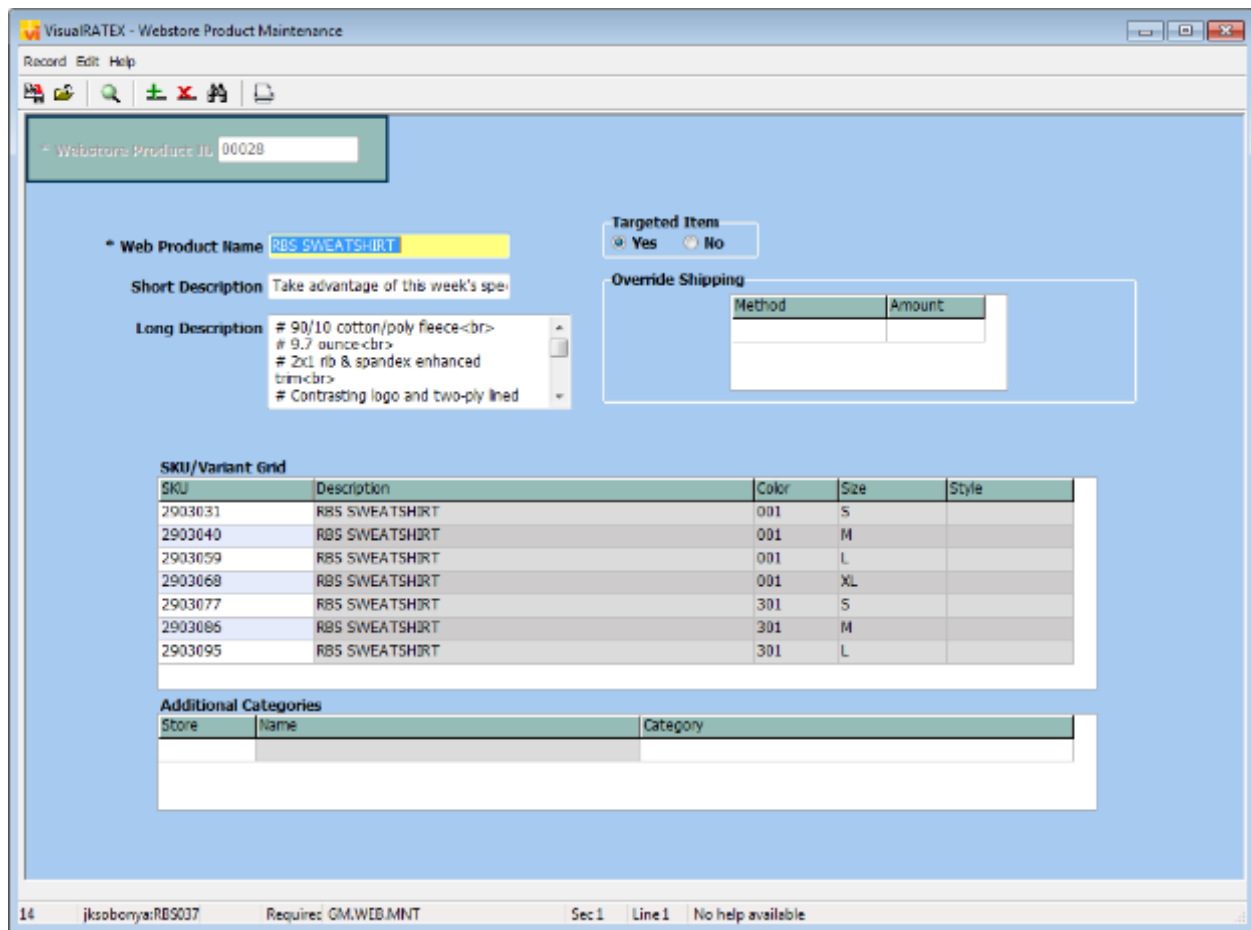
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In SKU Maintenance, press F9 in the Webstore ID field to create a new Webstore ID. (This will not work if the SKU is associated with a Color/Size Matrix). The Webstore Product Maintenance screen is explained in detail below.

## WEBSTORE PRODUCT MAINTENANCE

---

Webstore Product Maintenance is a screen where GM Webstore IDs are created and maintained. A Web ID can have a web product name, a short description, a long description, and other criteria that will be applicable to all of the corresponding SKUs that have varying sizes, colors, etc.



*GM.WEB.MNT  
Webstore Product Maintenance screen*

SKUs MUST be associated with a Web ID in order to be sent to the web. To add a SKU to the SKU/Variant grid, enter the SKU number or perform a word search to find the SKU. Press F9 to call a GM Selection screen to easily search for SKUs.

Tip:

Web IDs must NEVER be left blank. To associate a SKU with a different web ID, delete the original web ID, and put the product on the new web ID.

## AVAILABLE ONLINE LOGIC

SKU association with a Web ID drives whether or not GM products are sent to eRATEX. Once a Web ID with SKUs is saved, the data is immediately sent to eRATEX, and the “Available Online” flag is assumed to be “Y”. The “Available Online” flag may display as “null” or blank in the Web Information tab in SKU Maintenance; it does not change to “Y” when a SKU is associated with a Web ID.

The Available Online flag can be set by store, so those with multiple web sites can choose whether they want the product to be available in certain stores:

Item Information	Store Information	Serial Information	Discount Matrix	Web Information	Bundles	Like Sales															
Ship Separate <input type="radio"/> Yes <input type="radio"/> No		Targeted Item <input checked="" type="radio"/> Yes <input type="radio"/> No																			
Webstore ID <input type="text" value="00028"/>		Web Product Name <input type="text" value="RBS SWEATSHIRT"/>																			
Short Description <input type="text" value="Take advantage of this week's spei"/>		<table border="1"> <thead> <tr> <th>Web Store</th> <th>Out of Stock</th> <th>Low Stock</th> <th>Online Price</th> <th>Available Online</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>10</td> <td></td> <td></td> <td>Y</td> </tr> <tr> <td>10</td> <td></td> <td></td> <td></td> <td>N</td> </tr> </tbody> </table>					Web Store	Out of Stock	Low Stock	Online Price	Available Online	1	10			Y	10				N
Web Store	Out of Stock	Low Stock	Online Price	Available Online																	
1	10			Y																	
10				N																	
Long Description <input type="text" value="# 90/10 cotton/poly fleece&lt;br&gt;# 9.7 ounce&lt;br&gt;# 2x1 rib &amp; spandex enhanced trim&lt;br&gt;# Contrasting logo and two-ply lined hood with matching drawcord&lt;br&gt;# Woven tape and contrast half-moon facing at back neck&lt;br&gt;# Front pouch pocket&lt;br&gt;"/>		Override Shipping Amount <input type="text"/> Method <input type="text"/>																			

If a SKU is removed from a Web ID, the SKU is removed (deleted) from eRATEX.

If an entire Web ID is deleted, all SKUs are removed (deleted) from eRATEX.

## GIFT CARDS

Gift cards have a few additional setup requirements in order to be sold in eRATEX. There are two ways to set up gift cards: by SKU by gift card denomination, or by “entering your own price” for the gift card in eRATEX. Each method is explained below.

### GIFT CARD SKU SETUP

Gift card SKUs must be defined in SKU Maintenance. The SKU must be set up in a specific way for Order Fulfillment to fulfill it as a “gift card”. Here are the steps to set up the information:

**Auto Fees** - Each gift card SKU needs to be assigned an “Auto Fee” in SKU Maintenance. Auto Fees are created in Auto Fee Maintenance, located at GM > Database > Maintenance > Auto Fee Maintenance. The name of the Auto Fee needs to be your gift card fee letter [dot] store, for example, G.1 if your gift card fee in POS is “G” and your store is “1”. The POS Fee Code field must be your POS gift card fee (“G”). Fee Amount should be 0.00.

**Gift Card Fee Code Description** - The POS gift card fee (“G”) MUST have a description of “Gift Card Issued” or else it will not be recognized properly in Order Fulfillment. If the description needs to be changed, change it

in POS-PM-11-3 and import it to VisualRATEX using the following menu path: Sales > Utilities > Sales Fee Maintenance.

Gift Card Fee Code Definitions - Next, AV.PARAMETER GIFT.CARD.FEE.CODE must be defined with the Auto Fee that was created and assigned to your gift cards (ex. G.1). Order Fulfillment will recognize any fee codes that are entered here as gift cards.

Gift Card Fee Code Classes - Next, AV.PARAMETER CLASS.FEE must be defined with the gift card fee inventory “classes” – taxable and non-taxable.

Once this information is defined, the gift card setup is complete.

### **“CUSTOMERS ENTER THEIR OWN PRICE”**

Customers can enter their own price for a gift card in eRATEX. To do this, a gift card SKU must be set up in VisualRATEX with a price of 0.00, and the SKU must be associated to a web ID to send the product to eRATEX.

In the eRATEX Admin, there is a prompt at the variant-level called “Customer Enters Price.” Set the prompt to Yes to have the customer enter the price of the gift card. A price prompt can also be defined, as shown below:

\*Customer Enters Price:  No  Yes [?](#)

Customer Enters Price Prompt:  [?](#)



Learn more about the gift card fulfillment process in [the Order Fulfillment section](#).

## FEES

In the 37A .18 release of VisualRATEX, fees can be applied to GM items in eRATEX and Order Fulfillment. An example of a fee is a recycling fee for electronics like computer monitors, or an additional charge for personalized apparel.

To apply a fee to a GM item, an auto fee *with a dollar value* must be associated with the SKU record:

The screenshot shows the 'VisualRATEX - SKU Maintenance' application window. The 'SKU' field contains '2902347'. The 'Description' is 'IPOD NANO - PINK'. The 'Class' is '5304 APPLE ACCESSORIES' and the 'Accounting Class Target Markon' is '0.00'. The 'Buyer' is 'JKS JESSICA'. The 'Manufacturer Information' shows 'Manufacturer' as '101101 AP', 'Part Number' as '38434058', and 'MSRP' as '149.00'. The 'Vendor Information' table lists 'Vendor' as '101101 APPLE COMPUTER INC', 'Catalog ID' as 'APP04958', 'Cost' as '139.0000', 'Markon' as '-15.0', 'Lead' as '0', 'Units' as 'EA', 'Name' as 'EACH', 'Pack' as '1', and 'Min' as '1'. The 'Item Information' section includes fields for 'Size', 'Style', 'Season', 'Tag Type' (set to 'GM'), 'Shelf Code', 'Weight', 'Comments', 'PO Comments', 'Color' (set to '650 PINK'), 'Selling Units' (set to 'EA EACH'), 'Selling Packs' (set to '1'), 'UPC Codes' (set to '545155644545'), and 'Auto Fee' (set to 'RECY Recycle Fee').

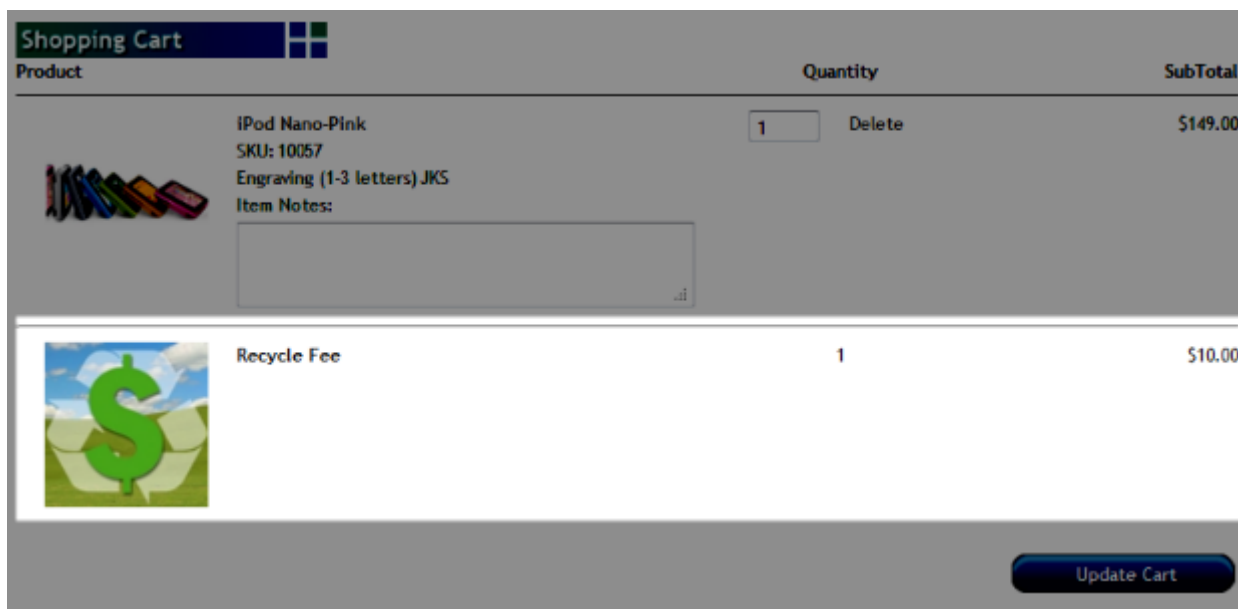
Vendor	Vendor Name	Catalog ID	Cost	Markon	Lead	Units	Name	Pack	Min	Prt Pk Qtys
101101	APPLE COMPUTER INC	APP04958	139.0000	-15.0	0	EA	EACH	1	1	

GM.SKU.MNT

GM SKU Maintenance screen, Auto Fee

Auto Fees are created in Auto Fee Maintenance, located at GM > Database > Maintenance > Auto Fee Maintenance. The name of the Auto Fee can be anything. The POS Fee Code field must be a fee code used in POS. Fee Amount should be the amount of the fee (ex. 10.00).

In eRATEX, the fee will be treated as a separate line item. If a customer purchases an item that has a fee, they will see the fee when the item is added to their shopping cart, as shown below:



**Tip:**

Fees are treated as “system products” in eRATEX. They cannot be searched for on the site or in the eRATEX Admin using normal searches. To add an image to a fee, search for “fee” in the eRATEX Admin using the Product Manager. The fee will be in the list of results. Click the fee and go to the Images tab to upload an image.

Learn more about the fee fulfillment process in the Order Fulfillment section.

## TRADEBOOKS (TR)

Tradebooks (TR) or “general books” can be a part of eRATEX. For Tradebook products to display on eRATEX, a few steps are required to set up the data.

## ISBNs

Every Trade product must be created in Tradebook Maintenance. Important fields to enter for each ISBN are author, title, publisher, vendor, volume, edition, copyright, binding, class, store, retail price, and weight.

## AVAILABLE ONLINE LOGIC

---

The “Available Online” flag in the Web Info section of the Store Information tab of Tradebook Maintenance must be set to a “Y” in order to be sent to the web. If the “Available Online” flag is “null” or blank, it will not be sent to the web. If the “Available Online” flag is “Y” and it later switched to “N” or “null”, the book will be *unpublished* from eRATEX.

## TEXTBOOKS (TX) & COURSES

Textbooks (TX) can potentially be the largest part and driving force on eRATEX. Course and textbook data can be sent from VisualRATEX to eRATEX to be viewed & purchased online.

There are a number of components that drive how course and textbook data is sent and viewed in eRATEX. Each component is described below. Textbook data will be described first, and then course data.

## TEXTBOOKS - ISBNS

---

Every textbook must be created in Textbook Maintenance. Important fields to enter for each ISBN are author, title, publisher, vendor, volume, edition, copyright, binding, class, store, retail price, and weight.

Textbook records must be created before creating course requests.

## AVAILABLE ONLINE LOGIC

---

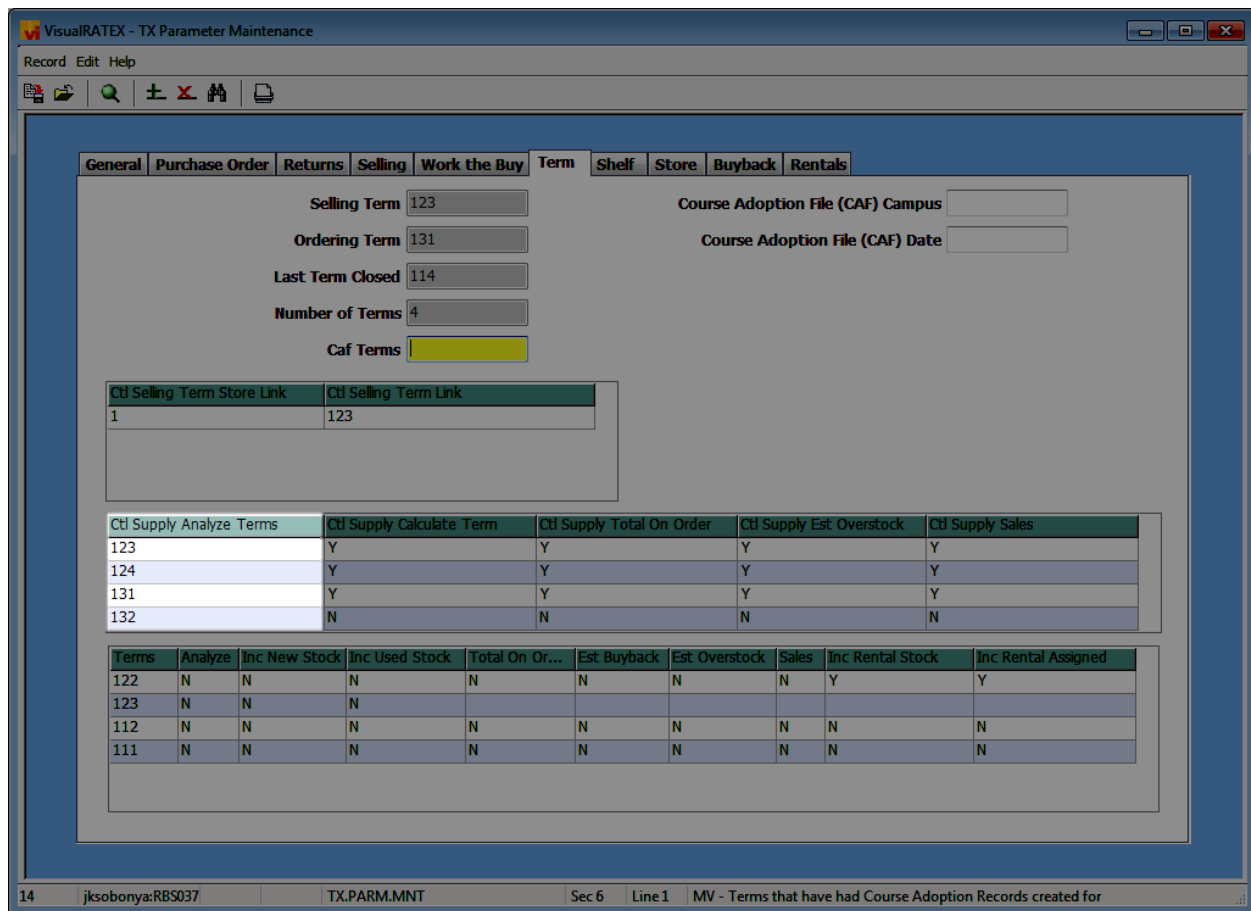
Textbooks have two “Available Online” flags – one for the New book and one for the Used book. By default, the “Available Online” flags are null when a new textbook record is created. Any textbook with a null “Available Online” flag will be uploaded to eRATEX automatically when it is created in VisualRATEX. *The textbook does not have to be linked to a course request for it to be uploaded to eRATEX.* The Available Online flag can be manually set to a “Y” instead of null, if needed. “Y” acts the same as null. If the “Available Online” flag is “Y” or null and it later switched to “N”, the book will be *unpublished* from eRATEX.

## COURSES - TERMS

---

In VisualRATEX, course data is sent to eRATEX based on a set of terms defined in Text Parameter Maintenance, Term tab:





Courses created for any term listed here will be sent to eRATEX. This term list MUST be kept up to date. If it is not kept up to date, course data will not be sent to eRATEX once the list of terms expires.

## COURSES – CREATION & MAINTENANCE

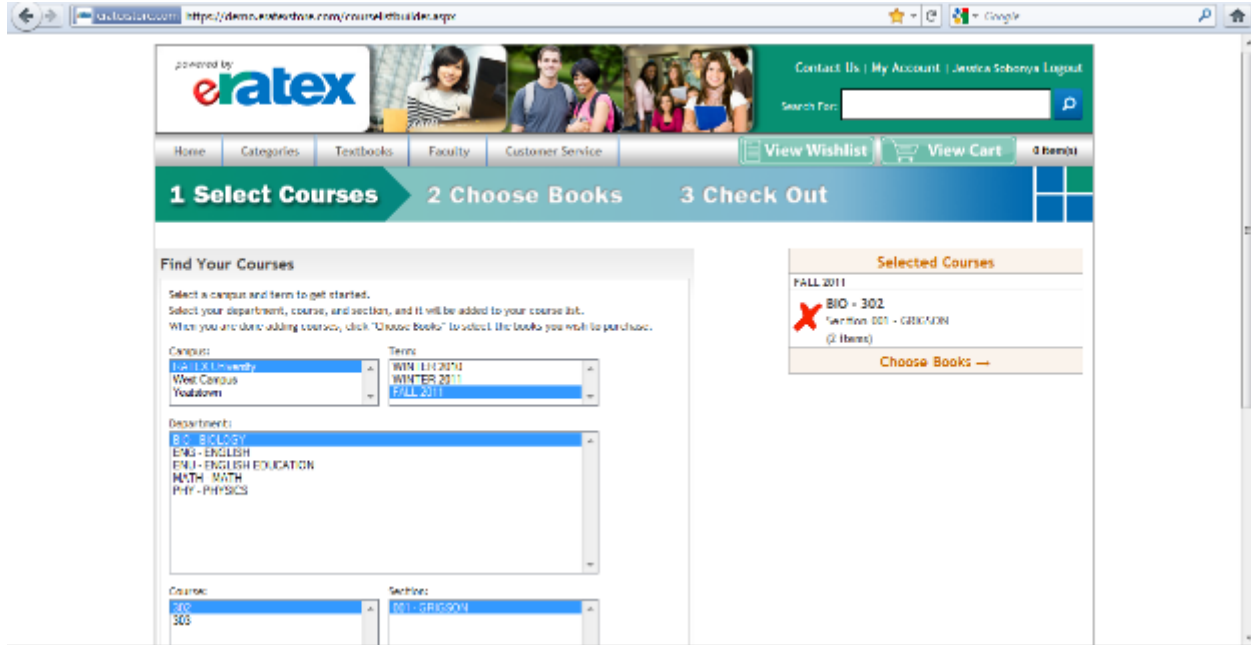
### IN VISUALRATEX

In VisualRATEX, courses are created and maintained in the Enter/Maintain Course Requests screen, located at Text > Course Requests > Enter/Maintain Course Requests.

As soon as a course request is created and saved, the course information is sent to eRATEX (assuming it is a course created for a term specified in Text Parameter Maintenance, as explained above) and is displayed on the Course Selection page and Book List page in eRATEX.

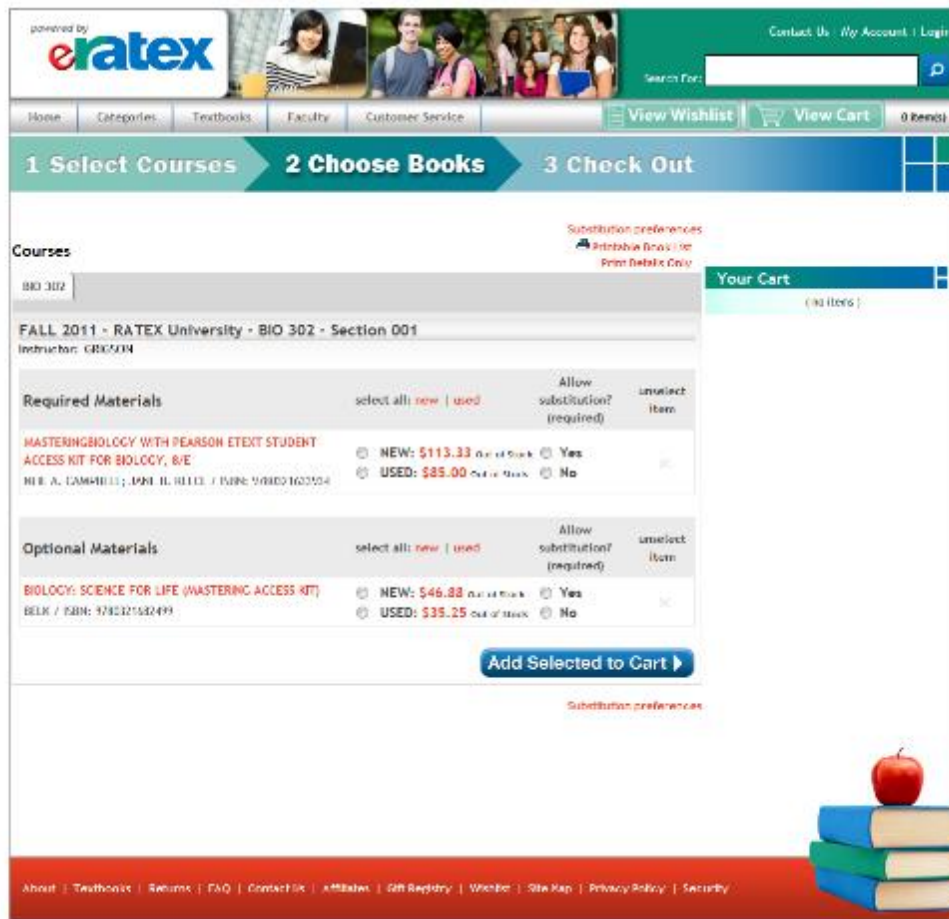
### IN ERATEX

The Course Selection page displays selection boxes for campus, term, department, course, and section. Students can select the applicable data to select a course. One selected, the course will display on the right side of the screen, as shown:



eRATES  
Course Selection page

Clicking “Choose Books” will display the Book List page. This page that shows course data for the course that the student selected, including all books associated with that course:



Powered by eRATEx™ RATEX Business Solutions  
eRATEx  
Book List page

The student can select which books they want to add to their cart and check out. (Tip: The Checkout process will be described in another part of this document – *coming soon*.)

If the course is modified in VisualRATEX (i.e. a book is added to the course), the course is updated appropriately in eRATEX and the Book List page.

## COURSES - DELETIONS

In VisualRATEX, if a book is removed from a course request, the book is removed from the Book List page in eRATEX. If an entire course is deleted in VisualRATEX, the course information is removed from the Book List page in eRATEX.

## INVENTORY SETTINGS

Product inventory is sent to eRATEX on a near real-time basis. The inventory level shown in VisualRATEX for a text, trade, or general merchandise product is the inventory level shown in eRATEX.

Tip:

If using the multi-store logic, product inventory is “summed” for every store defined in the Store List in Web Store Maintenance. For example, if store 1 has 10 on hand, store 2 has 20 on hand, and store 3 has 30 on hand, eRATEX would have 60 on hand.

Purchase thresholds can be defined in eRATEX and VisualRATEX to ‘hide’ a product from eRATEX if the product’s inventory falls below the threshold. eRATEX has a global threshold called RATEX.PurchaseThreshold which can be applied to all products. Two additional purchase threshold settings can be defined in VisualRATEX which will override the eRATEX Admin purchase threshold setting.

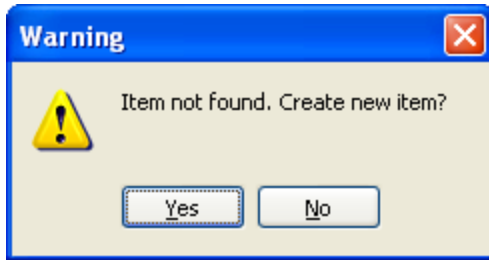
## INVENTORY WEB RULE

An inventory web rule can be created in VisualRATEX for a class of items; this setting will override the default purchase threshold in eRATEX.

To create an inventory web rule in VisualRATEX, go to Admin > Web Store > Web Rule Maintenance. In the Class.Store field at the top of the screen, enter a CLASS.STORE combination. For example, if the Sweatshirt class is 1500 and the Store is 1, enter 1500.1 in the field and press Enter.

\* Class.store 1500.1

Select Yes to create a new item.



In the Context field, type VARIANT and press Enter or Tab. Select HideVariantsWithLessThanThisInventoryLevel for the Field selection and press OK. In the Value field, enter the product threshold for the class of items. Press F10 to save.

## OUT OF STOCK VALUE

---

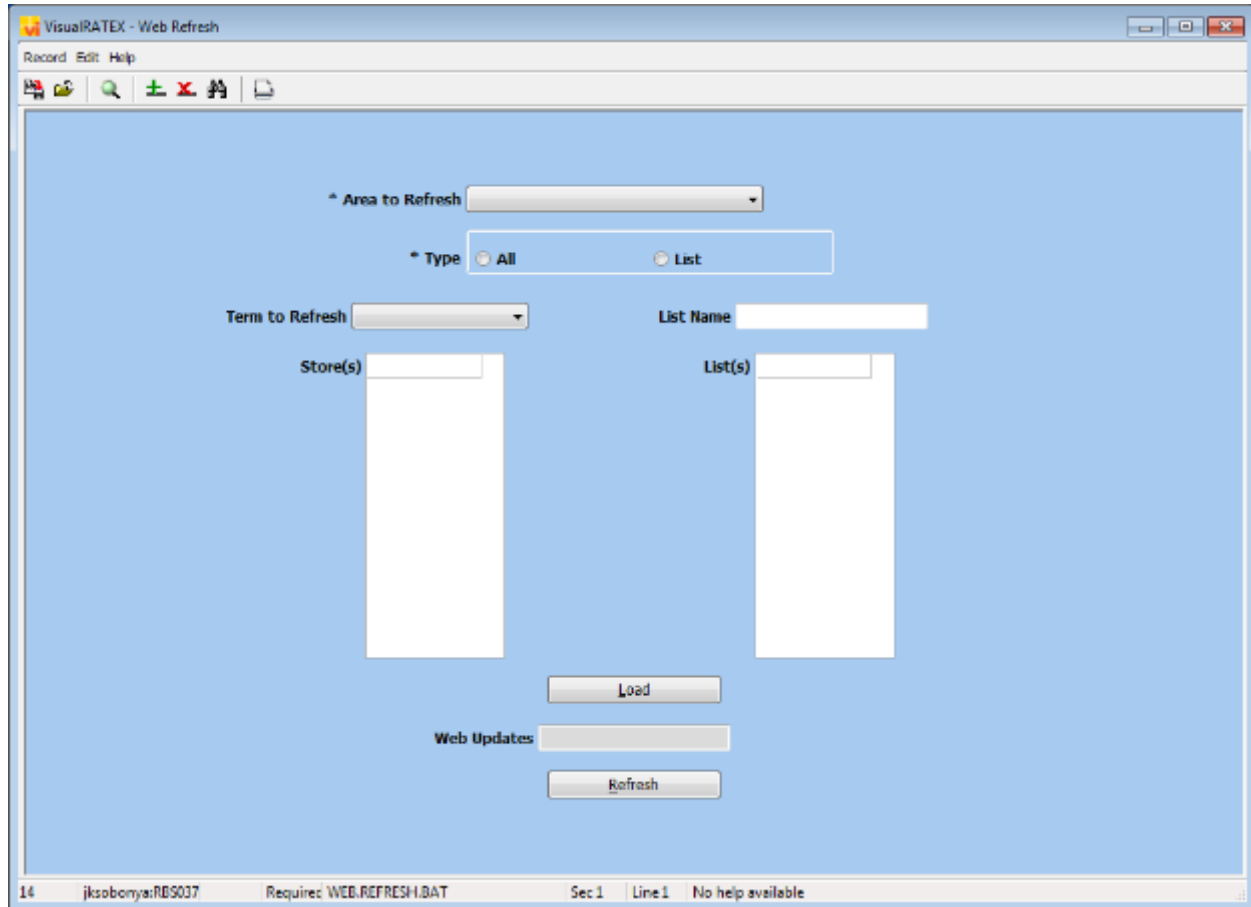
An out of stock value can be assigned to specific ISBNs/SKUs in VisualRATEX; this setting will override the default purchase threshold in eRATEX, and the inventory web rule, if defined.

To assign an out of stock value to a product, open the product in Textbook Maintenance, Tradebook Maintenance, or SKU Maintenance. Go to the Store Information tab (Text/Trade) or Web Information tab (GM) and enter a value in the Out of Stock column. Press F10 to save.

## REFRESHING WEB DATA

Web data may need to be manually refreshed to eRATEX. If there is an integration failure, or web update creation failure, products may need to be manually refreshed to eRATEX.

To refresh data, go to Admin > Web Store > Refresh Web Data. The following screen will display:



WEB.REFRESH.BAT  
Web Refresh screen

Select an Area to Refresh. You can select one of the following files:

- GM.WEB - GM Web File
- POS.GST - Gift Card File
- SALES.ORDER - Sales Order File (for order updates)
- TAX.LOCALITY - Tax Locality File (*this is not currently supported*)
- TR.TMF - Trade Title Master File
- TX.CEF - Course Enrollments File
- TX.CRF - Course Request File
- TX.TMF - Text Title Master File
- WEB.RULES - Web Rules File

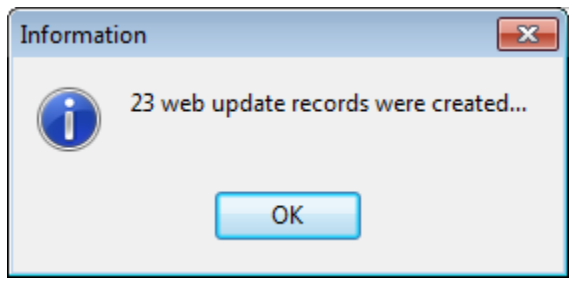
Data in these files will be refreshed to your web site if they meet certain criteria. For example, only tradebooks that have an Available Online of "Y" will be refreshed to the web.

Term to Refresh is a required field in order to refresh the TX.CRF or TX.CEF. If a bookstore has more than one eRATEx site, data can be sent by Store.

A list of data can be refreshed to eRATEx instead of an entire file of data. To refresh a list, create the list at TCL or using the Save List Maintenance screen. Select the List radio button and enter the list name in the List Name field. The List(s) grid will populate with the data in the list.

When finished selecting the data to refresh, click the Load button. The data will be analyzed and the number of items that will be refreshed to the web will display in the Web Updates field.

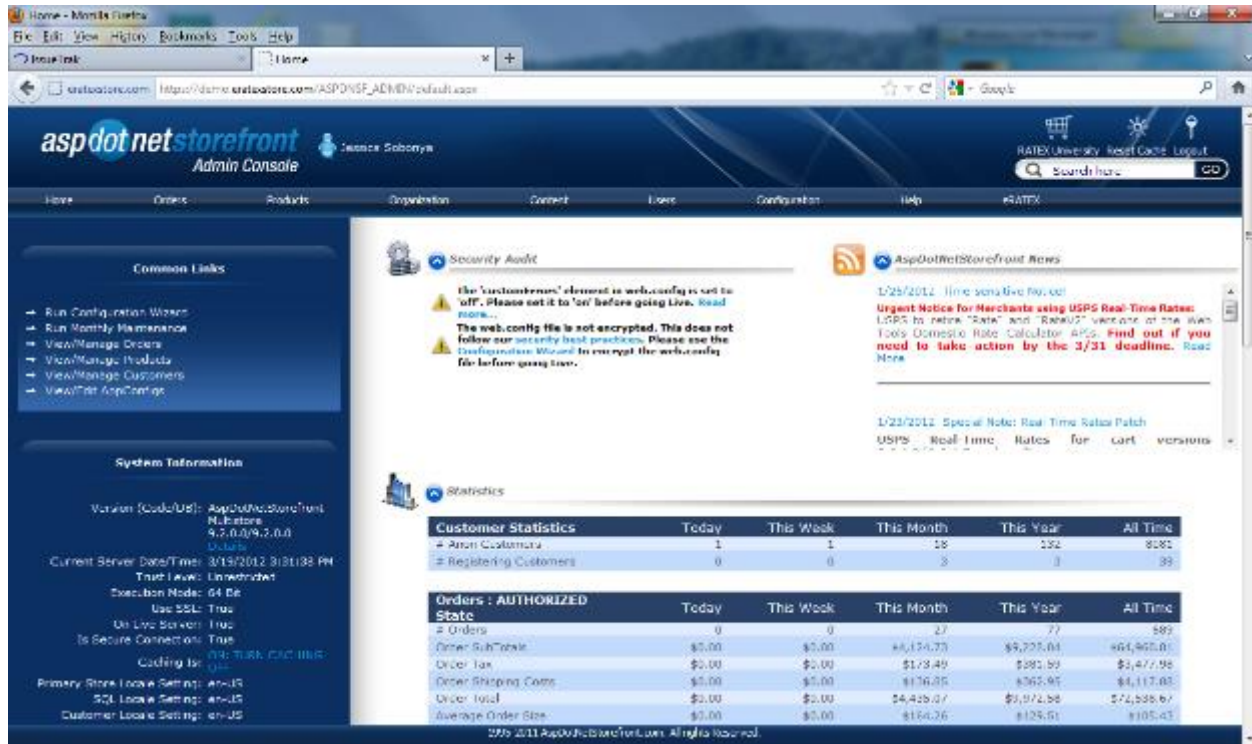
Click the Refresh button to refresh the items to eRATEx. An Information box will display the number of web update records that were created:



Depending on the number of updates being sent, it could take a few seconds to a few minutes to a few hours for the data to be sent to eRATEx.

# eRATEX ADMINISTRATION

Web product data is maintained in the eRATEX Admin, located at [http://www.yourwebsitename.com/ASPDNSF\\_ADMIN](http://www.yourwebsitename.com/ASPDNSF_ADMIN):



*eRATEX Admin  
Home*

A login and Admin privileges are required in order to access the Admin area of eRATEX.

The eRATEX Admin is the “backend” of eRATEX where a lot of the site content is maintained. In the eRATEX Admin, an Administrator can create categories, publish/unpublish web products, upload images, create page-specific content, view orders, create and maintain customer data, and much more. The next several pages of this document will discuss these various functions of eRATEX.

## CONFIGURATION WIZARD

The Configuration Wizard is home to many important setup features & configuration in eRATEX. The bookstore name, domain, origin zip code, and default currency are a few basic fields that must be defined here. More advanced setup for payment methods, a payment gateway, and e-mail can also be defined here.



## PAYMENT METHODS

eRATEX supports four payment methods: Credit Card, AR Charge, Student/Campus Charge, and Department Charge. Each payment method has several parameters that can be defined by clicking the “Configure” link next to the payment method:

*Payment Methods Accepted:		
<input checked="" type="checkbox"/> Credit Card		<a href="#">configure</a>
<input checked="" type="checkbox"/> AR Charge		<a href="#">configure</a>
<input checked="" type="checkbox"/> Student / Campus Card		<a href="#">configure</a>
<input checked="" type="checkbox"/> Department Charge		<a href="#">configure</a>

[Configure Per Store](#)

Each payment method configuration is described below. Once the payment methods are configured, click the check box to display the payment method on the Checkout Payment page, so a customer can make their payment method selection when they place an order on eRATEX.

## CREDIT CARD CONFIGURATION

Credit card is the most obvious configuration choice. There are several parameters that can be defined here:

**Configure Credit Card Processing**
✕

?	<b>Transaction Mode:</b>	Default: <input type="text" value="AUTH"/>	📄
?	<b>Store Credit Cards:</b>	Default Store: <input checked="" type="radio"/> No <input type="radio"/> Yes Default: <input checked="" type="radio"/> No <input type="radio"/> Yes	
?	<b>Validate Card Numbers:</b>	Default Store: <input checked="" type="radio"/> No <input type="radio"/> Yes Default: <input checked="" type="radio"/> No <input type="radio"/> Yes	
?	<b>3DSecure Card Types:</b>	Default: <input type="text"/>	📄
?	<b>Partial Auth - Enabled:</b>	Default Store: <input type="radio"/> No <input checked="" type="radio"/> Yes Default: <input type="radio"/> No <input checked="" type="radio"/> Yes	
?	<b>Partial Auth - Amount:</b>	Default: <input type="text" value="0.01"/>	📄
?	<b>Partial Auth - Message:</b>	Default: <input type="text" value="Your card is only being validated at this tim"/>	📄
?	<b>Partial Auth - Disable Auto Reversal:</b>	Default Store: <input checked="" type="radio"/> No <input type="radio"/> Yes Default: <input checked="" type="radio"/> No <input type="radio"/> Yes	
?	<b>Non Partial Auth Message:</b>	Default: <input type="text" value="To prevent being charged more than once,"/>	📄
?	<b>Authorize using New Textbook Price:</b>	Default Store: <input checked="" type="radio"/> No <input type="radio"/> Yes Default: <input checked="" type="radio"/> No <input type="radio"/> Yes	

The Transaction Mode should always be Auth. When a web order is placed, the full amount or partial amount will be authorized, and a charge/settlement will occur when the order ships/closes in Order Fulfillment.

eRATEX does not use the Store Credit Cards, Validate Card Numbers, or 3DSecure Card Types parameters because eRATEX does not store credit card data; all credit card data is processed by the CyberSource Business Center. The Partial Auth parameters control the authing logic. Authorize Using New Textbook Price will auth for the new textbook price if a used textbook is ordered and the substitution preference is Yes. This can only be used for full auths.

Click the Save and Close button to save the changes to the credit card configuration setup.

## AR CHARGE CONFIGURATION

The Accounts Receivable (AR) module in VisualRATEX can be used as a payment method in eRATEX. A student can select AR during checkout, and the resulting sales order in Order Fulfillment will be charged against the customer's available credit, or a scholarship/grant on the student's account. Students can only use one scholarship/grant per web order. A scholarship/grant and the available credit balance cannot be used on the same web order.

If the AR account numbers are a specific alphanumeric length, define a mask in AR Charge Mask.

The remaining parameters are for scholarship/grant information. Show Scholarship will show scholarship fields to the student during checkout. Scholarship Required will require a scholarship to be entered in order to proceed with the checkout. Scholarship Mask will validate the scholarship, if entered manually. Scholarship List will allow the student to select a scholarship from a dropdown, or manually enter a scholarship. To display the scholarships in a dropdown, enter the scholarships as

“Scholarship1Description~Scholarship1Code;Scholarship2Description~Scholarship2Code.” If the list is blank,

a blank field will display. The student can enter a scholarship name which can be validated by the Scholarship Mask.

Click the Save and Close button to save the changes to the AR Charge configuration setup.

## STUDENT / CAMPUS CARD CONFIGURATION

Student cards can be offered as a payment method in eRATEX.

The majority of the student card functionality/logic takes place in Order Fulfillment/POS\*Liberty, but in eRATEX, you can set up a Student / Campus Card Mask to ensure that the correct card length is entered during the checkout process. Student card funds are not validated in eRATEX; the student card is validated when the web order is downloaded to Order Fulfillment.

Click the Save and Close button to save the changes to the Student / Campus Card configuration setup.

## DEPARTMENT CHARGE CONFIGURATION

Department charges are similar to AR charges; instead of a student placing an order, a department is placing an order.

If the department charge account numbers are a specific alphanumeric length, define a mask in Department Charge Mask.

Authorized User Email List will only allow those with e-mail addresses defined here to place department charge orders. Department charge orders may not need to charge sales tax. If this is the case, set Charge No Tax On Orders to Yes.

Click the Save and Close button to save the changes to the Department Charge configuration setup.

## PAYMENT PROCESSING SOLUTIONS

eRATEX supports three payment gateways for credit card processing: CyberSource, Moneris, and TouchNet. CyberSource and TouchNet are the payment gateways used by US customers. Moneris is the payment gateway used by Canadian customers. Each payment gateway has a series of setup requirements for their respective Hosted Order Pages (HOP) and security files. Please refer to Appendix A for CyberSource Setup, and Appendix B for Moneris Vault Setup.

Payment Processing Solutions	
<b>Payment Gateway:</b> Configure Per Store and Backup Gateways	<input checked="" type="radio"/> <b>CyberSource HOP</b> <span style="float: right;"><a href="#">configure test mode</a>   <a href="#">configure</a></span>
	<input type="radio"/> <b>Moneris HOP</b> <span style="float: right;"><a href="#">configure test mode</a>   <a href="#">configure</a></span>
	<input type="radio"/> <b>TouchNet HOP</b> <span style="float: right;"><a href="#">configure</a></span>

## PAYMENT AUTHORIZATION OPTIONS

For those bookstores accepting student cards and AR online, some additional options are available to authenticate students via an authentication service. Currently, OneCard and SAML/Shibboleth are supported; more options may be available in the future if the bookstore requests it. By default, these options are disabled.

If your bookstore is interested in using an authorization service with student cards or AR charge, please [contact RBS](#).

Payment Authorization Options	
<b>Student Card Authorization:</b>	<input checked="" type="radio"/> <b>Disabled</b>
	<input type="radio"/> <b>Cornell Card</b> <span style="float: right;"><a href="#">configure</a></span>
	<input type="radio"/> <b>OneCard</b> <span style="float: right;"><a href="#">configure</a></span>
	<input type="radio"/> <b>SAML/Shibboleth</b> <span style="float: right;"><a href="#">configure</a></span>
<b>AR Charge Authorization:</b>	<input checked="" type="radio"/> <b>Disabled</b>
	<input type="radio"/> <b>SAML/Shibboleth</b> <span style="float: right;"><a href="#">configure</a></span>

[Submit](#)

## CATEGORIES

Web site categories must be created in the eRATEX Admin under Organization > Categories:

Categories

Search:  Go

Showing 1-15 of 15

Show Deleted

ID	Name	Published	Delete
328	Featured Products	Unpublish	<input type="checkbox"/>
313	TextBooks	Publish	<input type="checkbox"/>
309	UnPublished New Items	Publish	<input type="checkbox"/>
313	General Books	Unpublish	<input type="checkbox"/>
310	Clothing	Unpublish	<input type="checkbox"/>
322	School Supplies	Unpublish	<input type="checkbox"/>
315	Graduation and Gifts	Unpublish	<input type="checkbox"/>
323	Food and Beverages	Publish	<input type="checkbox"/>
319	Technology and Computers	Unpublish	<input type="checkbox"/>
317	Gift Cards	Unpublish	<input type="checkbox"/>

Show Deleted

*eRATEX Admin  
Categories*

To create a new category, click the green plus sign in the bottom left corner of the screen. Fill in the information in the Main tab; click Save and Close to save the category. A category must be published in order to display on eRATEX. An Administrator can create as many categories and subcategories as necessary.

**Tip:**

The category/subcategory that will display the products on eRATEX needs to have the following XML Package selected:

`entity.gridwithprices.xml.config`

Products will NOT display on eRATEX if this XML package is not selected.

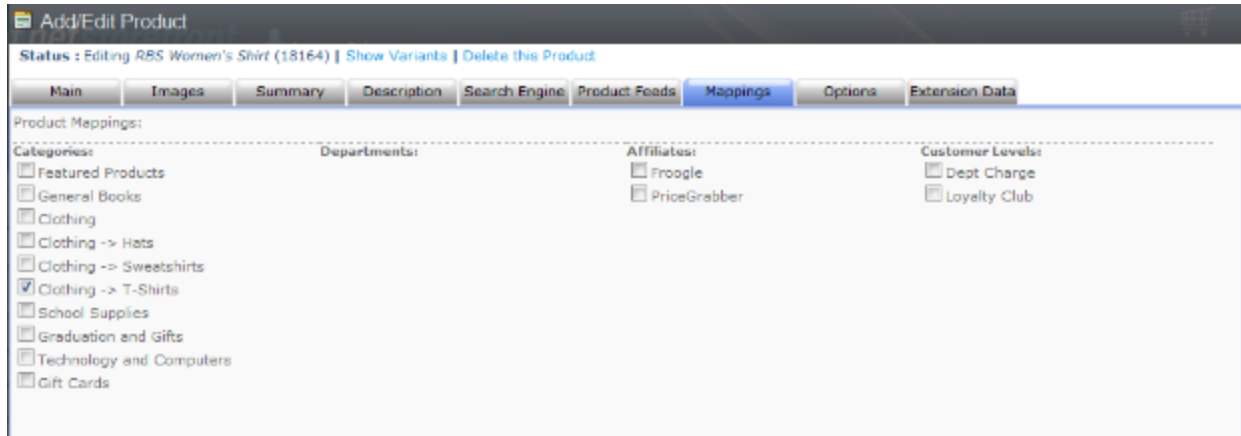
## PRODUCT ASSOCIATION

Products can be associated with categories in two ways:

- Exclusively on the web
- In VisualRATEX

## IN ERATEX

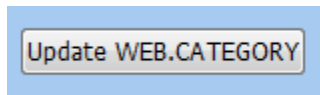
When products are uploaded to eRATEX, they can be mapped to a category by clicking a product to Add/Edit, and clicking the Mappings tab. Products can be mapped to as many categories as necessary. Check the applicable categories and click the Update button at the bottom of the screen when finished.



## IN VISUALRATEX

Instead of manually associating each product to a category as they upload to the web, the categories can be downloaded to VisualRATEX. In VisualRATEX, products can be associated to categories by creating a Category Web Rule.

To download the categories to VisualRATEX, go to Admin > Web Store > Web Update, select Web Download, and click the Monitor button. There is a button on the screen called “Update WEB.CATEGORY”:

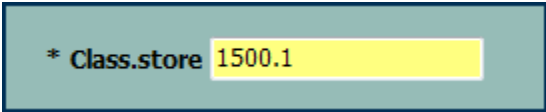


Click the UPDATE WEB.CATEGORY button to send an update to the web to download the categories to VisualRATEX.

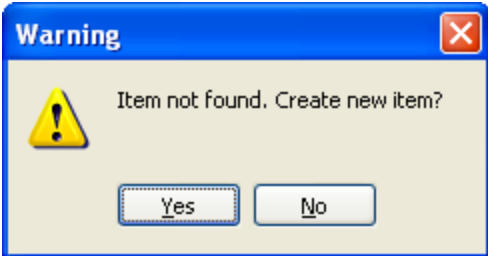
Once the categories have been downloaded to VisualRATEX, they can be assigned a Category Web Rule.

## CATEGORY WEB RULES

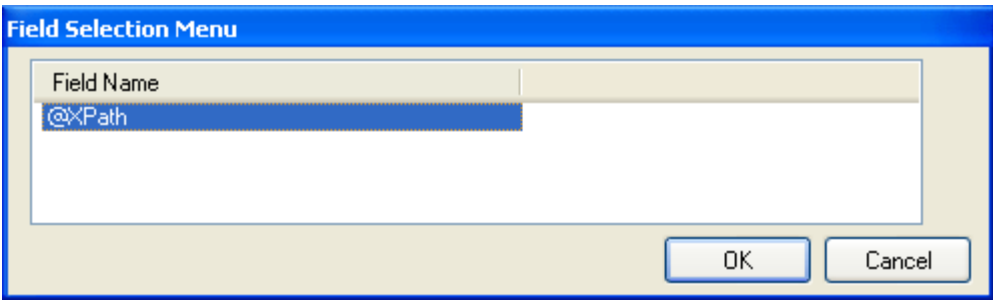
To assign a category web rule in VisualRATEX, go to Admin > Web Store > Web Rule Maintenance. In the Class.Store field at the top of the screen, enter a CLASS.STORE combination. For example, if the Sweatshirt class is 1500 and the Store is 1, enter 1500.1 in the field and press Enter.



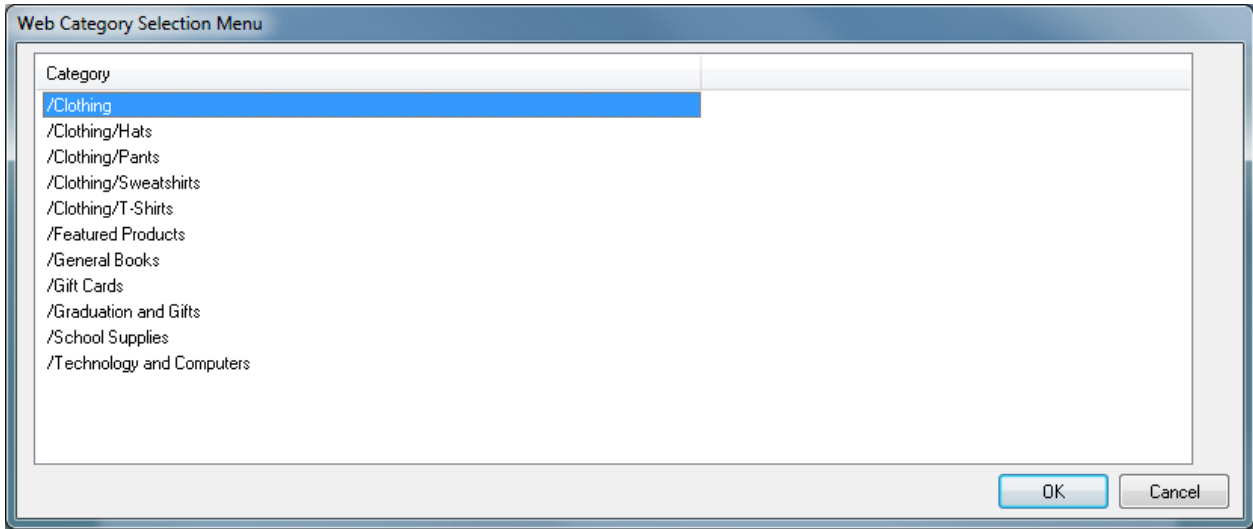
Select Yes to create a new item.

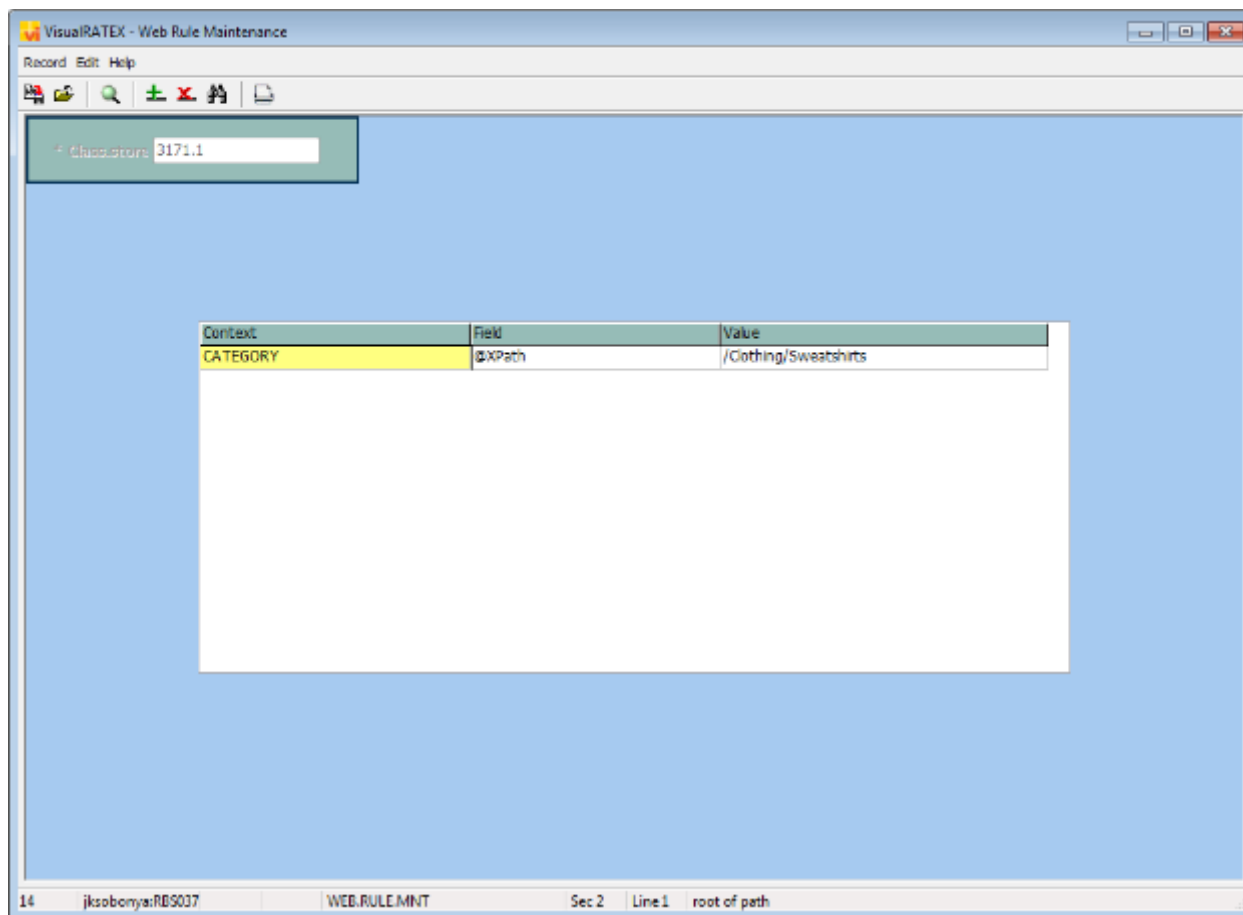


In the Context field, type CATEGORY and press Enter or Tab. Select @XPath for the Field selection and press OK.



In the Value column, press F9. The web categories will display in a pop-up box. Select which category to associate with the class and click OK.





WEB.RULE.MNT

Webrule Maintenance screen

If necessary, press F4 or to add a line and associate the CLASS.STORE to another category. When finished, press F10 to save the record.

## **ADDITIONAL CATEGORIES IN WEBSTORE PRODUCT MAINTENANCE**

Some specialty items on eRATEX may need to be associated to an additional category. For example, promotional items, holiday items, etc. may need to go in an additional category for a period of time. A Web ID can be assigned to an additional category by opening the Web ID in GM Webstore Product Maintenance. In the bottom grid, enter the store number and press F9 in the Category column. The web categories will display in a pop up box. Select which category to associate with the web ID and click OK. Press F10 to save the record. An update will go to the web and the item will display in the additional category.

Additional Categories		
Store	Name	Category
1	RATEX UNIVERSITY BOOKSTORE	/Clothing/Sweatshirts

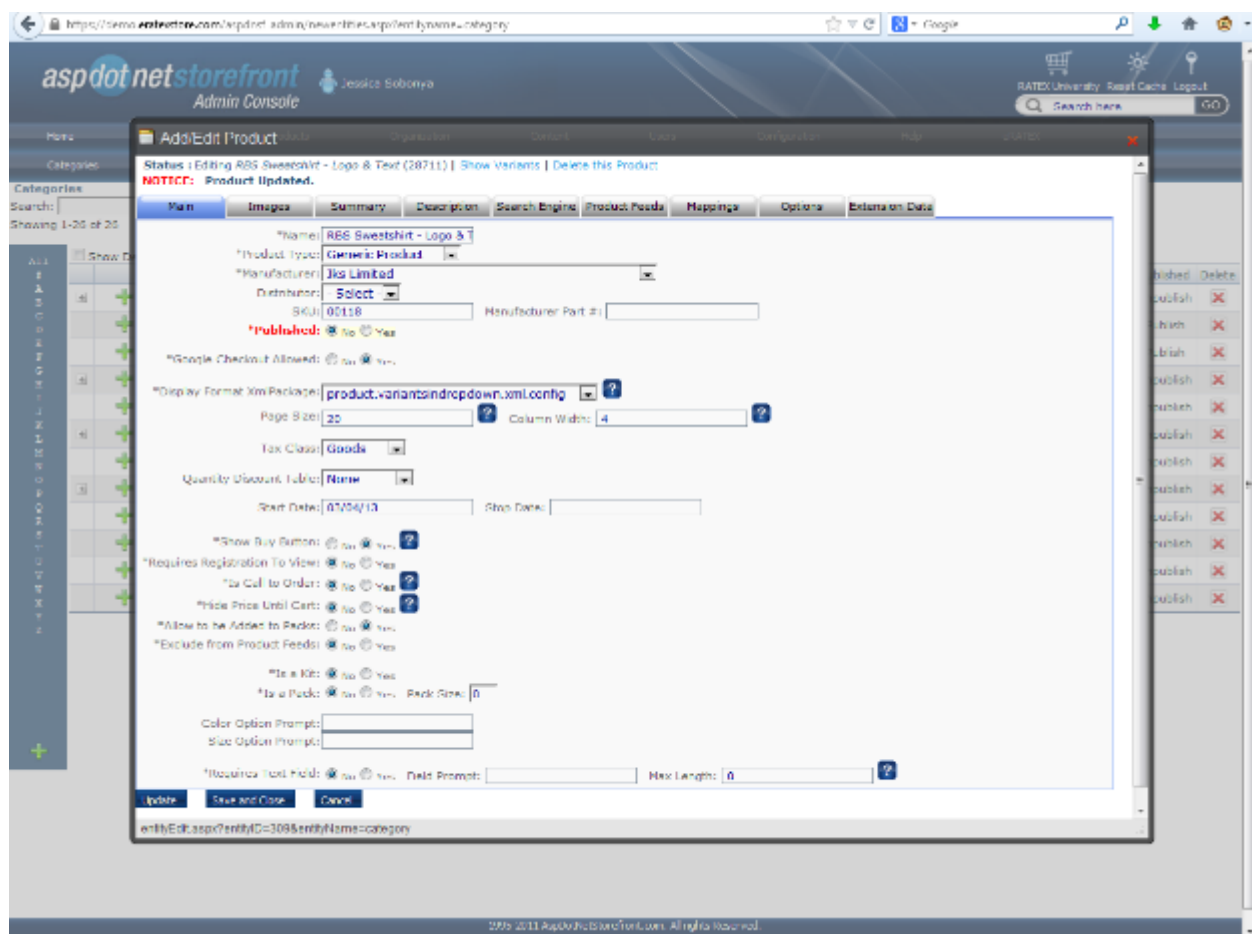


## PRODUCTS

As products are uploaded from VisualRATEX to eRATEX, they need to be reviewed, edited, mapped to a category, and published. Each step in this process is outlined below.

### REVIEWING/EDITING A PRODUCT

To review/edit a product, search for it using the Search bar, the Product Manager, or find the product in the Category view in the Unpublished New Items category. Click the product to open it. When viewing a product, the following information will display:



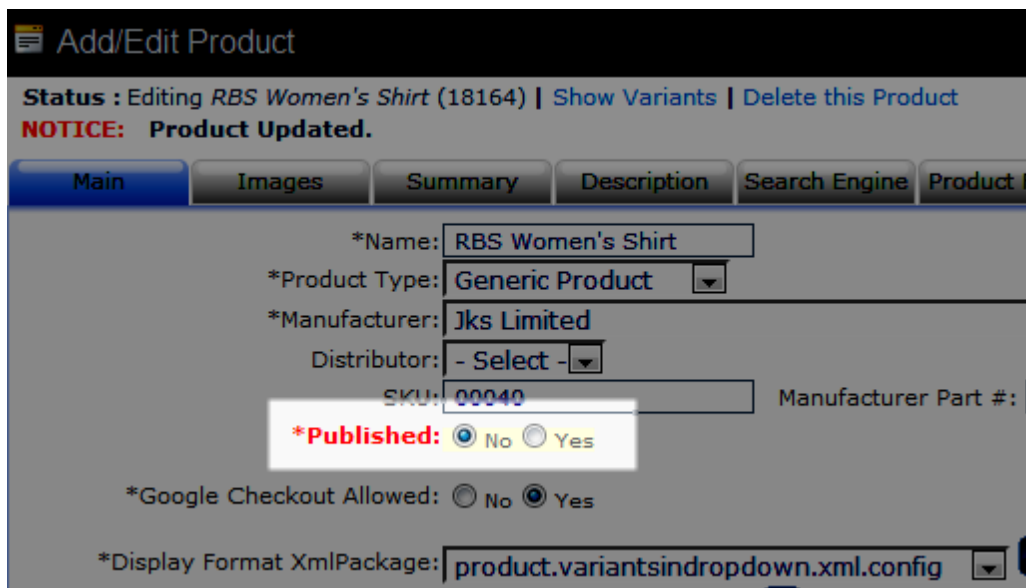
eRATEX

*Reviewing/Editing a Product*

There are several tabs of information. Each tab is briefly described below. For detailed information about each tab, please see ASPDOTNETSTOREFRONT's documentation: <http://manual.aspdotnetstorefront.com/p-960-product-attributes.aspx>

Main

The Main tab shows basic information about the product, like the name, product type, manufacturer, SKU, and tax class. The Published Flag is also on this tab. By default, General Merchandise (GM) and Trade (TR) web products are NOT automatically published when they are uploaded to eRATEX. The products must be manually published by changing the Published radio button from No to Yes, as shown below:



Textbooks are automatically published in eRATEX.

To unpublish an item, change the Published radio button from Yes to No.

### Images

The Images tab is where product images can be uploaded. For more information about uploading product images, see the next “Product Images” section below.

### Summary

The Summary tab displays the short description of the product (GM) or the author (TX/TR) as defined in VisualRATEX.

### Description

The Description tab displays the long description of the product (GM/TX/TR) as defined in VisualRATEX.

### Search Engine

The Search Engine tab allows each product to have its own page title, keywords, description, and even alt text to help with Search Engine Optimization (SEO). For more information about SEO, please see ASPDOTNETSTOREFRONT’s documentation: <http://manual.aspdotnetstorefront.com/p-1029-seo.aspx>

### Product Feeds

The Product Feeds tab is an area to enter product descriptions used for export feeds.

### Mappings

The Mappings tab is where products are mapped to categories. This is explained previously in the Categories section.

### Options

The Options tab allows products to be associated to one another in a variety of ways. Products can be “related”, “upsell” (i.e. buy one get one 50% off, etc.), or “required”.

### Extension Data

The Extension Data tab is used to enter misc text, notes, etc., about a product. Information entered here is not displayed anywhere on the site.

## **PRODUCT IMAGES**

---

Every product on eRATEX should have at least one image associated with it. Products can have up to 3 images: an icon (small) image, a medium image, and a large image. Images can be uploaded in one of two ways: using this Images tab, or using an FTP service.

### **FTP**

---

Product images can be uploaded to the eRATEX Database via an FTP service. Images must be named a certain way in order for them to show properly on eRATEX. Images can be named by SKU (for GM SKU = Web ID) or by Product ID. Set eRATEX AppConfig UseSKUForProductImageName to Yes to use the SKU naming convention, or No to use the Product ID naming convention.

Images can be uploaded into the icon, medium, and large image folders in the eRATEX database.

### **ADMIN**

---

Product images can be uploaded in the eRATEX Admin. Each product has an Images tab to upload images. One benefit of using the eRATEX Admin interface is that the medium and icon images can be created automatically when the large image is uploaded. Various AppConfigs control the image sizes.

The Multi-Image Manager allows multiple images to be uploaded for the same product. Up to 10 images can be uploaded per product.

Variant (SKU) images can be uploaded as well. Variant images are displayed on the site when a customer selects a specific color/size option from the dropdown. Variant images are also displayed in the shopping cart and in the product view on the Mobile application.



### RBS Hat - Embroidered Logo

Multiple colors available! Navy hat is on sale for a limited time!

Options:

Quantity:

Add to Cart

Add to Wishlist

This hat the RBS logo embroidered on the front and comes in a variety of colors. Buy yours today!

E-mail this product to a friend

eRATEx  
Product & Variant Images

Add/Edit Product
Status: Editing RBS Hat - Embroidered Logo (28579) | Show Variants | Delete this Product

Main
Images
Summary
Description
Search Engine
Product Feeds
Mappings
Options
Extension Data

Image Filename Override:

Icon:   [Click here to delete the current image](#)

Icon Multi-Image Manager

Medium:   [Click here to delete the current image](#)

Medium Multi-Image Manager

Large:   [Click here to delete the current image](#)

eRATEx

## SHIPPING METHODS

Shipping methods need to be set up in the eRATEX Admin so a customer can select a shipping method during the checkout process. There are a variety of shipping methods and rate calculations that are supported in eRATEX.

### SHIPPING METHOD SETUP

First, decide which shipping methods to offer on eRATEX (UPS, FedEx, USPS, etc.) and define each method in the eRATEX Admin in the following menu location: Configuration > Shipping > Shipping Methods, as shown below:

The screenshot shows the 'aspdot.net storefront Admin Console' interface. The main content area is titled 'New In: Shipping Methods' and contains a table of shipping methods. Below the table is an 'Update' button and a note about Real Time Shipping Methods.

ID	Method	Display Order	Edit	Allowed States	Allowed Countries	Allowed Zones	Allowed Payment Methods	Delete
1	UPS Ground	1	Edit	Set Allowed States	Set Allowed Countries	Set Allowed Zones	Set Allowed Payment Methods	Delete
2	UPS 2nd Day	1	Edit	Set Allowed States	Set Allowed Countries	Set Allowed Zones	Set Allowed Payment Methods	Delete
3	UPS Next Day	1	Edit	Set Allowed States	Set Allowed Countries	Set Allowed Zones	Set Allowed Payment Methods	Delete
4	In-Store Pickup	1	Edit	Set Allowed States	Set Allowed Countries	Set Allowed Zones	Set Allowed Payment Methods	Delete

Update

The following Real Time Shipping Methods have been added automatically by the storefront, based on the rates returned for various customers. They should also be automatically mapped to allowed states & countries. You should only ever need to delete these shipping methods (and that should not be very often).

How were these mapped to states & countries? We assume that the carriers only return rates valid for the customer who requested them, so we analyzed that and just add the rate to the state and country that the customer was in when they requested the rates.

NOTE: It should be unusually rare to have to delete one of these methods! If you want to exclude them from being used by customers, set the AppConfig:RTShipping.ShippingMethodsToPrevent parameter!

ID	Method	Delete
7	In-Store Pickup	Delete
8	Campus Delivery	Delete

eRATEX  
Shipping Methods

To create a new shipping method, click “Add New Shipping Method.” Enter the name of the shipping method and click “Add New” to add the shipping method to the eRATEX Admin. Next, select which state(s) and countries the shipping method will ship to. If United States is an “Allowed Country,” “Allowed States” MUST be selected as well; selecting the country does NOT set all of the states/provinces within that country. For international shipping methods, Other (Non-US) must be selected in the “Allowed States.”

## PICKUP METHOD SETUP

When creating a new shipping method above, if a shipping method is a “pickup” method (i.e. In-Store Pickup), select “Yes” next to the Is Pickup prompt. When “Yes” is selected, additional fields will display to enter additional information about the pickup method, as shown below:

**aspdot netstorefront**  
Admin Console

Home Orders Products Organization Content Users Configuration

Now In: Edit Shipping Method  
Editing Shipping Method: In Store Pickup (ID=6)

Please enter the following information about this shipping method. Fields marked with an asterisk (\*) are required. All other fields are optional.

\*Name:

\* Real Time Shipping Rate:

Is Pickup:  Yes  No

\* VR Ship Method Name:

Show Pickup Contact Data:  Yes  No

Default to Billing Address:  Yes  No

Pickup Address:

\* Name:

\*Address1:

Address2:

\*City or APO/AFO:

\*State/Province:

\*Zip:

Country:

[Update](#) [Back](#)

eRATEX  
Pickup Method Setup

Fill in the fields for the Pickup method:

VR Ship Method Name – Enter the name of the pickup method as defined in VisualRATEX.

Show Pickup Contact Data – Select Yes to show pickup contact data when the pickup method is selected on the Shipping page, as shown below:

1 SHOPPING CART    2 ADDRESS BOOK    **3 SHIPPING OPTIONS**    4 PAYMENT INFO    5 ORDER CONFIRMATION    6 ORDER COMPLETED

**Select Shipping Address:** 2250 Hickory Road Plymouth Meeting PA United States 19462

**Please select the desired shipping method below:**

In Store Pickup \$0.00  
 Please enter the contact information of the person picking up the order:

\* Pickup Contact Name:  Use Billing Info

\* Phone Number:

Email Address:

West Campus Pickup \$1.50

eRATEX

*Pickup Contact Data for Pickup Shipping Method*

Pickup contact data can be entered for the person who is going to pick up the order in the bookstore, for example, if a parent places an order for a student, the parent would put the student’s name, phone number, and e-mail address in the fields. The pickup contact name and phone number will be sent down with the order on the “shipping address”. The e-mail address will be stored in eRATEX for e-mail communication that the order is ready for pickup.

Default to Billing Address – Select Yes to default the customer’s billing name, phone number, and e-mail address as the pickup contact data.

Pickup Address – enter the pickup address name, address, city, state, zip code, and country. This address will be used as the shipping address of the pickup order.

When finished entering this information, click Update to save the information. Click “Back” to return to the Shipping Method screen.

## SHIPPING RATES

Once the shipping methods have been defined, the shipping rates must be defined. Click “Configure Rates” to go to the Rates page, or select Configuration > Shipping > Shipping Rates Table from the menu.



**aspdotnetstorefront**  
Admin Console

Jessica Sobonya

Home   Orders   Products   Organization   Content   Users

**Now In: Shipping**

- Calculate Shipping By Weight
- Calculate Shipping By Total
- Use Fixed Prices
- All Orders Have Free Shipping
- Use Fixed Percentage Of Total
- Use Individual Item Shipping Costs
- Use Real Time Rates

**Set As Active Shipping Calculation Method**

---

**FIXED RATE SHIPPING TABLE:**

Shipping Method	Flat Rate	
UPS Ground	<input type="text" value="5.9500"/>	(in x.xx format)
UPS 2nd Day	<input type="text" value="12.9500"/>	(in x.xx format)
UPS Next Day	<input type="text" value="14.9500"/>	(in x.xx format)
In-Store Pickup	<input type="text" value="0.0000"/>	(in x.xx format)

**Update**

eRATEX  
Shipping Rates

There are several rate options to choose from: Calculate Shipping by Weight or Total, Fixed Prices, Fixed Percentage of Total, Real Time Rates, Individual Item Shipping Costs, and Free Shipping. Select which shipping rate to use, and click “Set As Active Shipping Calculation Method” to use the rate. Set up the necessary rate information for the rate option.

*TIP: Please refer to ASPDOTNETSTOREFRONT’s documentation for setting up real time shipping here: <http://manual.aspdotnetstorefront.com/p-980-real-time-shipping-rates.aspx>*

When the shipping method setup is complete in the eRATEX Admin, the same shipping methods must be defined [in Order Fulfillment](#).

## FREE SHIPPING

Free shipping can be offered in many ways in eRATEX. At the variant-level of every product, there is an option for Free Shipping:



\*Is Free Shipping:  No  Yes  No Shipping Required [?](#)

One option in the Coupon Setup is free shipping:

\*Discount Includes Free Shipping:  No  Yes

Free shipping can be used for orders equal to or greater than a specific dollar amount by setting AppConfig FreeShippingThreshold:

	Default	76	FreeShippingThreshold	If set to a dollar amount (no \$ sign) orders equal to or greater than this amount will have free shipping. A value of 0.00 or blank disables this feature.	SHIPPING
--	---------	----	-----------------------	---	----------

eBooks purchases are also given free shipping.

If the above methods are used to offer free shipping on orders, it is not necessary to set up a free shipping method in the eRATEX Admin; *a free shipping method is already created in eRATEX with an ID of 0 (zero)*. The “free” shipping method will need to be created in Order Fulfillment.

## SALES TAX

Most products in eRATEX will need to charge some type of sales tax. Sales tax can be charged in a variety of ways in eRATEX.

### PRODUCT TAX CLASSES

A product tax class is assigned to each product in eRATEX. The eRATEX Admin provides several default product tax classes, like Goods and Shipping. The defaults can be used, or new product tax classes can be created.

Home	Orders	Products	Organization	Content	Users	Configuration	Help	eRATEX
Home > Product Tax Classes								
Tax Classes:								
<a href="#">ADD NEW</a>								
ID	Name	Tax Code						
<a href="#">5</a>	Alcohol	X-ALC						
<a href="#">1</a>	Goods	X-GRD						
<a href="#">2</a>	Services	X-SVC						
<a href="#">3</a>	Shipping	X-SHP						
<a href="#">6</a>	Toothpaste	X-TPST						
<a href="#">4</a>	Tobacco	X-TOB						

To create a new product tax class, click the ADD NEW button. Enter the name of the new Product Tax Class, and if applicable, a tax code:

**Tax Classes:**  
 Fields marked with an asterisk (\*) are required. All other fields are optional.

\*Tax Class:

Tax Code:

Click Submit to create the new product tax class.

Once the product tax classes have been added, products can be assigned the tax classes.

## PRODUCT ASSOCIATION

By default, all products uploaded to eRATEX are assigned a Product Tax Class of 1 (Goods). To change the product tax class, edit a product and change the product tax class, as shown below:

**Status :** Editing *RBS SWEATSHIRT (16308)* | [Show Variants](#) | [Delete this Product](#)

**Main** | Images | Summary | Description | Search Engine | Product Feeds | Mappings

\*Name:

\*Product Type:

\*Manufacturer:

Distributor:

SKU:  Manufacturer Part #:

\*Published:  No  Yes

\*Google Checkout Allowed:  No  Yes

\*Display Format XmlPackage:  ?

Page Size:  ? Column Width:

Tax Class:  ?

Quantity Discount Table:

Start Date:  Stop Date:

\*Show Buy Button:  No  Yes ?

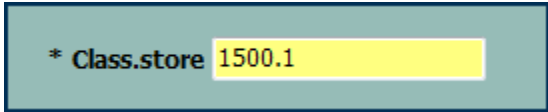
\*Requires Registration To View:  No  Yes

If many products need to use a different tax class, a web rule can be created in VisualRATEX to associated products to a tax class.

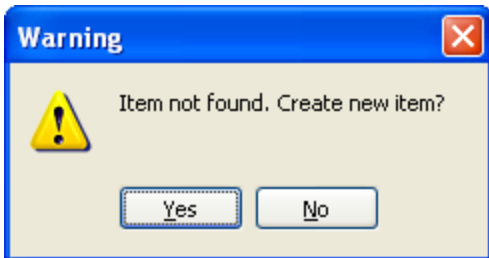
## TAX CLASS WEB RULES

In VisualRATEX, a class web rule can be created to associate a class of products to a product tax class.

To assign a tax class web rule in VisualRATEX, go to Admin > Web Store > Web Rule Maintenance. In the Class.Store field at the top of the screen, enter a CLASS.STORE combination. For example, if the Sweatshirt class is 1500 and the Store is 1, enter 1500.1 in the field and press Enter.



Select Yes to create a new item.



In the Context field, type PRODUCT and press Enter or Tab. Select TaxClass/@ID for the Field selection and press OK. In the Value field, enter the ID of the product tax class, as shown below:

**Tax Classes:**

ADD NEW

	ID	Name
Edit	5	Alcohol
Edit	1	Goods
Edit	2	Services
Edit	3	Shipping
Edit	6	Textbooks
Edit	4	Tobacco

When finished, press F10 to save the record. Updates will be sent to eRATEX to change the product tax class.

## TAX RATES

Sales tax rates can be applied at three levels: country, state/province, and local/zip code. State/province is the most commonly used sales tax rates, but all three will be explained here.

### BY COUNTRY

A country tax rate can be set up in the eRATEX Admin. To set up country tax rates, go to Configuration > Taxes > Edit Countries.

Now In: Taxes by Country

[Home](#)

Country Taxes:

[ADD NEW](#) [Update Taxes](#)

ID	Country	*2 Letter ISO Code	*3 Letter ISO Code	*Numeric ISO Code	*Postal Code Required	*Postal Code Reqex	*Postal Code Example	Display Order	Alcohol Goods	Specify Tax Rates				
										Services	Shipping	Textbooks	Tobacco	
<a href="#">Edit</a> 1	United States	US	USA	840	<input type="checkbox"/>			1	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 3	Argentina	AR	ARG	032	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 4	Armenia	AM	ARM	051	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 5	Aruba	AW	ABW	533	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 6	Australia	AU	AUS	036	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 7	Austria	AT	AUT	040	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 8	Azerbaijan	AZ	AZE	051	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 9	Bahamas	BS	BHS	044	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 10	Bangladesh	BD	BGD	050	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 11	Belarus	BY	BLR	112	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 12	Belgium	BE	BEL	056	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 13	Bolivia	BZ	BOL	084	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 14	Bermuda	BM	BMU	060	<input type="checkbox"/>			2	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	<a href="#">X</a> <a href="#">Edit</a>

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A list of countries will display. If necessary, a new country can be added so tax can be applied. To the right side of the screen, there is an area to specify the tax rates based on the product tax classes that were previously defined. To add a tax rate, click the Edit button and add the applicable rate to the applicable product tax class. Click Update to save the information.

## BY STATE/PROVINCE

A state/province tax rate can be set up in the eRATEX Admin . To set up state/province tax rates, go to Configuration > Taxes > Edit States/Provinces.

Now In: States

[Home](#)

State Taxes:

[ADD NEW](#) [Update Taxes](#)

ID	State/Province	Display Order	Abbrev.	Alcohol	Goods	Services	Shipping	Textbooks	Tobacco	Country	Del
<a href="#">Edit</a> 4	AA (Armed Forces Americas)	1	AA	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 5	AE (Armed Forces Europe)	1	AE	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 1	Alabama	1	AL	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 2	Alaska	1	AK	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 63	Alberta	1	AB	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	Canada	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 3	American Samoa	1	AS	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 6	AP (Armed Forces Pacific)	1	AP	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 7	Arizona	1	AZ	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 8	Arkansas	1	AR	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 64	British Columbia	1	BC	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	Canada	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Add New</a>	California	1	CA	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 10	Colorado	1	CO	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>
<a href="#">Edit</a> 11	Connecticut	1	CT	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	United States	<a href="#">X</a> <a href="#">Edit</a>

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A list of states/provinces will display. If necessary, a new state/province can be added to tax can be applied. To add a tax rate, click the Edit button and add the applicable rate to the applicable product tax class. Click Update to save the information.

## BY ZIP CODE

A local/zip tax rate can be set up in the eRATEX Admin. To set up zip code tax rates, go to Configuration > Taxes > Tax Rates by Zip Code.

Now In: Tax Rates Home

**Zip Code Taxes:**  
Enter only ZipCodes for which you want to charge sales tax. For those ZipCodes, enter the tax rate for your ZipCode (city, county, state, etc.)

Zip Code	Country	Specify Tax Rates								
		Alcohol	Goods	Services	Shipping	Textbooks	Tobacco			
ADD Cancel	09462	City: 00204	United States	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	X

Zip codes and rates need to be added manually. Click ADD NEW to enter a new zip code and tax rate. When the record is saved, the tax rate will be applied to the Goods product tax class.

Click the Edit button and add the applicable rate to the applicable product tax class. Click Update to save the information.

Once the sales tax rates have been defined in eRATEX, they must also be defined in Order Fulfillment.

## E-MAIL TYPES & SETTINGS

All e-mail communication is sent from eRATEX. There are three different types of e-mails that can be configured and sent to customers or to an administrator, depending on your settings:

- Receipt E-mail
- Order Notification E-mail
- Order Update E-mail
  - Shipped E-mail
  - Canceled E-mail
  - Credit Card Decline E-mail

E-mail needs to be configured in the eRATEX Admin, and there are several XML packages and string resources that control how the e-mails are built & displayed.

## E-MAIL CONFIGURATION

E-mail settings are configured in the eRATEX Admin under Configuration > Mailing Test:

**Now In: Mailing Test Wizard**

\*Mail Server DNS:

Mail Server Username (optional):

Mail Server Password (optional):

\*Mail Server TCP Port:

Mail Server Requires SSL  Yes  No

\*Receipt Email sends from (E-Mail Address):

Receipt Email sends from (Name):

\*Receipt Email sends with XML Package:  ▼

\*Send Receipt E-Mails:  Yes  No

\*New Order Notifications send to (Email Address):

New Order Notifications send to (Name):

New Order Notifications send from (Email Address):

New Order Notifications send from (Name):

Send New Order Notifications send with XML Package:  ▼

\*Send New Order Notifications:  Yes  No

\*Shipped Emails send with XML Package:  ▼

\*Send Shipped E-Mails:  Yes  No

eRATEX  
Mailing Test Wizard

In this screen, specific e-mail parameters must be defined, like the mail server DNS, a username/password, the TCP Port, the “From” e-mail address, and the XML packages used for each e-mail type. Once the settings are configured, the e-mails can be “tested” by clicking the “Send Test” buttons at the bottom of the screen. The e-mails will be sent to the user who is logged into the eRATEX Admin. The New Order Notification e-mail will be sent to the e-mail address in the “New Order Notification send to” field.

Each e-mail type is explained below.

## RECEIPT E-MAIL

A receipt e-mail is sent to a customer when they have successfully placed an order on eRATEX. The receipt summarizes their order information. An example of a receipt e-mail is below:

From: eratem  
 Sent: Wednesday, November 07, 2012 2:57 PM  
 To: Jessica Sobonya  
 Subject: RATEX University Receipt (TEST MODE)

**RATEX University Receipt**  
 \*\*\* PLEASE PRINT RECEIPT OUT AND RETAIN IT FOR FUTURE REFERENCE \*\*\*

Order Number 110819  
 Customer ID 101014  
 Order Date 11/7/2012 11:56:14 AM

Bill To: Jessica Sobonya Bill: 2250 Hickory Road Plymouth Meeting, PA 19462 United States 1-810-421-4800 <a href="mailto:jssobonya@ratem.com">jssobonya@ratem.com</a>	Ship To: Jessica Sobonya Bill: 2250 Hickory Road Plymouth Meeting, PA 19462 United States 1-810-421-4800
--	--

Order Date:	11/7/2012 11:56:14 AM	Locale/Currency:	en US / USD
Payment Method:	Credit Card	Name On Card:	Jessica Sobonya
Card Type:	Visa	Card Number:	****

SKU:	Product	Quantity	Price	Discount	Ext. Price
00047	RB5 Hat-All Sizes Black	1	\$19.99	\$5.00	\$14.99

Order Notes:  
None

SubTotal:	\$14.99
Shipping: UPS Ground	\$7.95
Tax:	\$0.48
<b>Total:</b>	<b>\$23.42</b>

eRATEX  
 Receipt E-mail Example

The XML package that builds the receipt e-mail is notification.receipt.xml.config. The XML package can be modified to change certain properties of the e-mail, like font size, graphics, and color.

## STRING RESOURCES

Parts of the e-mail can be changed by modifying string resources. Below is a list of string resources that pertain to the receipt e-mail:

Common.cs.1 – this controls the word “Receipt” that displays at the top of the e-mail: *Receipt*

Common.cs.2 – this controls the subject of the e-mail: *{0} Receipt (TEST MODE)*, where {0} is the store name.

Order.cs.71 – this controls the text that displays below the common.cs.1 text: *\*\*\*PLEASE PRINT RECEIPT OUT AND RETAIN IT FOR FUTURE REFERENCE\*\*\**

## ORDER NOTIFICATION E-MAIL

An order notification e-mail can be sent to an administrator whenever an order is placed on eRATEX. The order notification e-mail is a simple e-mail which has basic information about the order that was placed. An example of the order notification e-mail is below:

**From:** eratex  
**Sent:** Wednesday, November 07, 2012 2:34 PM  
**To:** Jessica Sobonya  
**Subject:** RATEX University New Order Notification (TEST MODE)

**Order Number:** 999999  
**Order Total:** \$0.00  
**Order Date:** 11/7/2012 2:33 PM  
**Payment Method:** CREDIT CARD  
**Shipping Method:** GROUND  
**Customer ID:** 101014

New Order Notification Email Successful

*Order Notification E-mail Example*

The XML package that builds this e-mail is notification.adminneworder.xml.config . In the Mailing Test Wizard, “Send New Order Notifications” must be set to “Yes” for these e-mails to be sent. The e-mail address in the “New Order Notifications send to (Email Address)” will receive the e-mails.

## ORDER UPDATE E-MAIL

---

An order update e-mail is sent to customers whenever their order is shipped or canceled during the Order Fulfillment process. The order update e-mail summarizes how many shipments are on the order, what was canceled, what was shipped, what is ready to be picked up (for in-store pickup orders), and what is processing. An example of the order update e-mail is below:



**From:** eratex  
**Sent:** Thursday, November 08, 2012 9:09 AM  
**To:** Jessica Sobonya  
**Subject:** RATEX University Order 110478 Status Update

## RATEX University

Hi Jessica,

We just wanted to let you know that we've updated the status of your order 110478, placed on 9/20/2012. Please contact us if you have any questions about this order.

Thanks for shopping with us,  
 RATEX University Customer Service

Please note: Replies to this e-mail will not be answered. If you require assistance please visit our website for contact information.

Your order was split into multiple shipments for faster processing. The shipments are shown below with the products in each shipment.

Order Number: **110478**

Shipment 1000553001: Ready to be picked up  
 Tracking Number: [5484849347848](#)

Quantity	Web Id	Description	Status
2	00027	<a href="#">Paper Mate Spirit Ball Point Pen - Green</a> PERSONALIZE: SOBONYA	Ready to be picked up

Shipment 1000553003: Canceled

Quantity	Web Id	Description	Status
8	00027	<a href="#">Paper Mate Spirit Ball Point Pen - Green</a> PERSONALIZE: SOBONYA	Canceled Customer cancellation

Powered by eRATEX

*eRATEX  
 Order Update E-mail Example*

The XML package that builds this e-mail is notification.orderupdate.xml.config.

There are AppConfigs that control whether or not the order update e-mail is sent:

SendShippedEMailToCustomer – must be set to “true” to send shipped e-mails

SendCanceledEMailToCustomer – must be set to “true” to send canceled e-mails

### **STRING RESOURCES**

Parts of the e-mail can be changed by modifying string resources. Below is a list of string resources that pertain to the order update e-mail:

Orderupdate.1 – this controls the e-mail subject: *{0} Order {1} Status Update* - where {0} is StoreName and {1} is order number

Notification.orderupdate.1 – this controls the text at the beginning of the e-mail: *Hi {0}, <br/><br/> We just wanted to let you know that we've updated the status of your order {1}, placed on {2}. <br/> Please contact us if you have any questions about this order. <br/><br/> Thanks for shopping with us, <br/>{3} Customer Service* – where {0} is the customer first name, {1} is order number, {2} is order date, and {3} is StoreName

Notification.orderupdate.2 – this controls the text that appears immediately after the orderupdate.1 text: *Please note: Replies to this e-mail will not be answered. If you require assistance please visit our website for contact information.*

Notification.orderupdate.3 – this controls the text that appears for a split shipment order: *Your order was split into multiple shipments for faster processing. The shipments are shown below with the products in each shipment.*

Notification.orderupdate.4 - .7 – these control the shipment statuses:

- 4 – *Ready to be picked up*
- 5 – *Shipped on {0} via {1}*, where {0} is ShipDate and {1} is Shipping Method
- 6 – *Canceled*
- 7 – *Processing*

Notification.orderupdate.8 – this controls the text that displays the shipment number and the shipment status: *Shipment {0}: {1}*

Notification.orderupdate.9 – this controls the text that displays the tracking number (if a tracking number was entered during the Order Fulfillment processing): *Tracking number:*

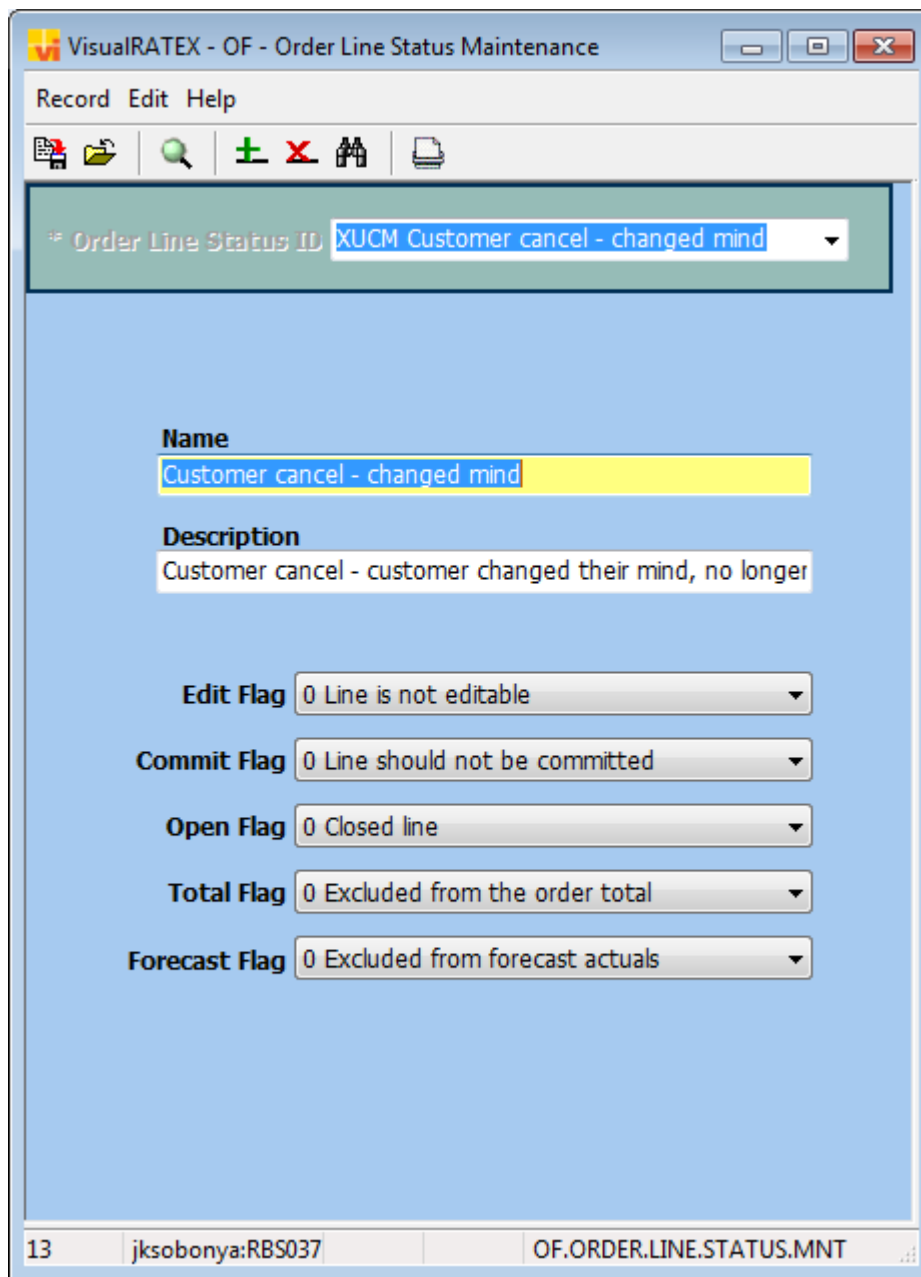
Notification.orderupdate.10 – this controls the text that displays in the HTML title tag of the e-mail: *Order Status Update*

Notification.orderupdate.11 – this controls the text that displays next to the internet order number: *Order Number:*

## **CANCELATION STATUS CODES & MESSAGES**

When [a sales order is canceled](#) in Order Fulfillment, a cancel status code is selected. A cancellation e-mail is sent to the customer based on the cancel status code. In eRATEX 3.0, cancellation messages can be added to each cancel code and included in the order update e-mail. Additional cancel status codes can be created in Order Fulfillment based on the needs of the bookstore.

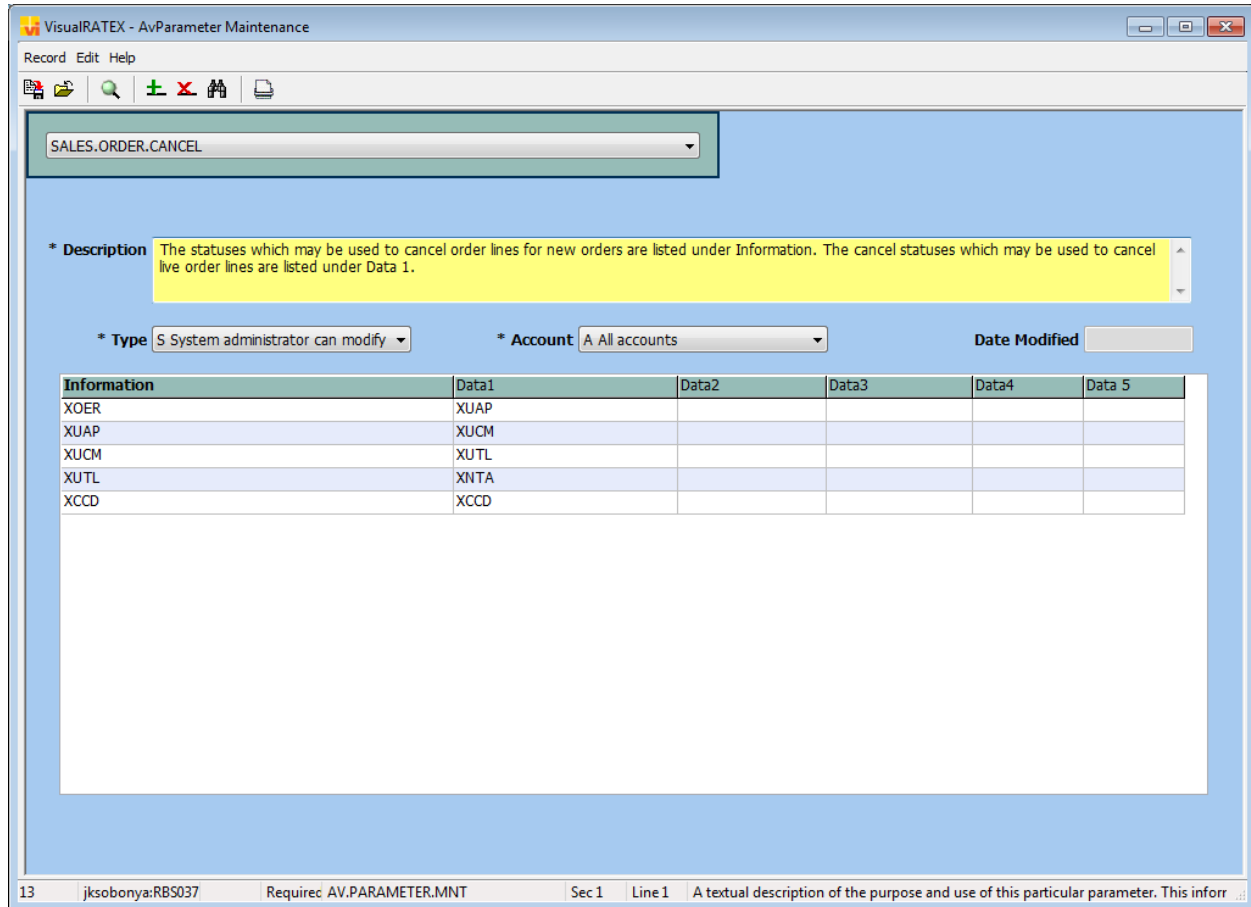
In VisualRATEX, cancel status codes are maintained using the following menu path: Order Fulfillment > Maintenance & Setup > Orders > Line Statuses:



*OF.ORDER.LINE.STATUS.MNT  
Order Line Status Maintenance screen*

To create a new cancel code, enter a code, typically 4 characters in length, in the Order Line Status ID field and press Enter; the user will be prompted to add a new record. The cancel code MUST begin with an “X” to be recognized by the system. Give the cancel code a name and description, and fill each dropdown flag with a “0”.

For new cancel codes to display in the cancel window in Sales Order Maintenance, the codes must be added to a parameter file. In VisualRATEX, go to Admin > Parameters > AvParameter, select SALES.ORDER.CANCEL, and add the new code(s) to the list:



AV.PARAMETER.MNT  
AvParameter Maintenance screen, SALES.ORDER.CANCEL

There are two lists of codes: Information and Data1. Information is used for “new sales orders” (sales orders that do not have a “live” date; these are typically sales orders that are downloaded to Order Fulfillment and are not INPR) and Data1 is used for “live” sales orders (sales orders with a “live” date; these are typically INPR sales orders).

In the eRATEX Admin, cancel messages can be added to cancel codes by creating string resources. Go to Content > String Resource Mgr and search for “shipping.linestatus”. The results should look similar to these results:

StoreId	ID	Name	Value	Modified	Locale
1	5389	shipping.linestatus.XHIN	No inventory - this item is being canceled because it is not in stock.	Yes	en-US
1	5390	shipping.linestatus.XNTA	Not Available - this item is being canceled because it is currently unavailable.	Yes	en-US
1	5392	shipping.linestatus.XUAP	Already Purchased - this item is being canceled because the customer already purchased this item on a different order.	Yes	en-US
1	5393	shipping.linestatus.XUCM	Customer Changed Mind - this item is being canceled because the customer changed their mind and no longer wants the item.	Yes	en-US
1	5394	shipping.linestatus.XUTL	Too Long A Wait - this item is being canceled because it is not in stock, and the customer does not want to wait for the item to be available.	Yes	en-US

Click Edit next to a line status and modify the Value section. This is where the cancel message is maintained. Any text entered here will display on the order update e-mail when the code is selected in Order Fulfillment.

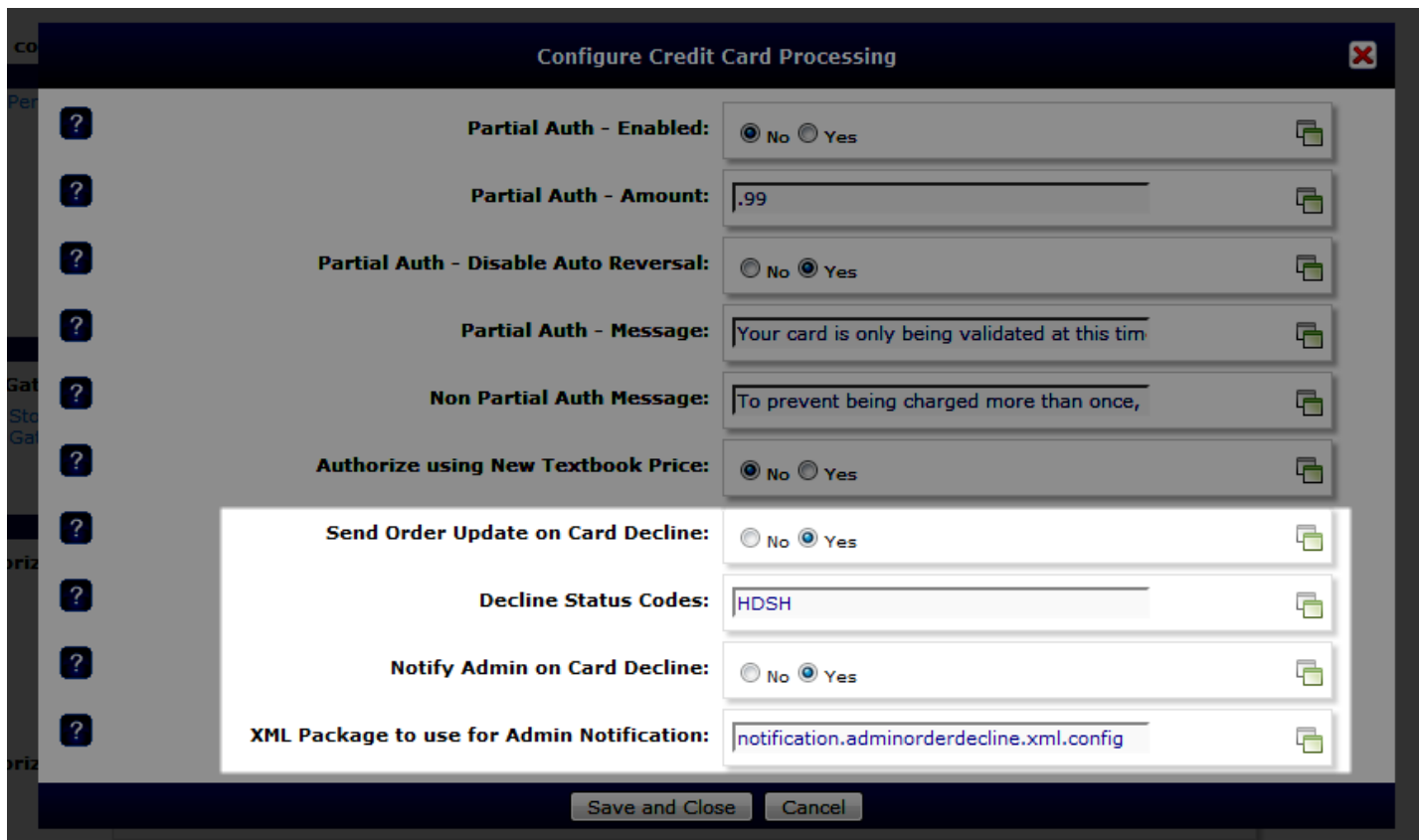
To create a string resource for a new cancel code, click ADD NEW String. The name of the string resource must be “shipping.linestatus.cancelcode” and the value is the cancel message.

## CREDIT CARD DECLINE E-MAIL NOTIFICATIONS

Logic has been added to eRATEx to send the customer – and the bookstore if necessary – e-mail notifications when a sales order fails to close due to a credit card decline.

## PARAMETER SETTINGS

To send these e-mails, the following parameters must be defined in the Configuration Wizard, under the Credit Card Configuration:



Send Order Update on Card Decline – Set to “Yes” to send an Order Update e-mail when a credit card declines upon shipment close.

Decline Status Codes – This should be set to “HDSH”, which is the decline status code used for credit cards.

Notify Admin on Card Decline – set to “Yes” to send an e-mail to an administrator when a credit card declines upon shipment close. The e-mail will be sent to the e-mail address listed in the “GotOrderEmailto” AppConfig.

XML Package to use for Admin Notification – The XML package used to send the Admin notifications is notification.adminorderdecline.xml.config.

## STRING RESOURCES

The following string resources have been added:

notification.admin.declinesubject – This string resource will display the Admin email subject when using live transactions.

notification.admin.declinesubjecttest - This string resource will display the Admin email subject when using test transactions.

notification.orderupdate.shipmentdecline - This string resource will display a note next to the shipment

number on the Order Notification e-mail and in the Order History page. By default, it set to display "Credit card problems - Please contact Customer Service" in red.

## TOPICS

The following topics have been added:

OrderDeclineHeader – This topic displays at the top of the Order Notification e-mail and in the Order History page.

## CREDIT CARD DECLINE E-MAIL EXAMPLES

Below are some examples of Credit Card decline e-mails, the first sent to a student, the second to an Admin:

**From:** Sales [<mailto:eratem@ratex.com>]  
**Sent:** Monday, January 20, 2014 12:43 PM  
**To:** Adam Conley  
**Subject:** 4.2-RATEX University Order 102045 Status Update

### 4.2-RATEX University

Hi Adam,

We just wanted to let you know that we've updated the status of your order 102045, placed on 1/15/2014. Please contact us if you have any questions about this order.

Thanks for shopping with us,  
 4.2-RATEX University Customer Service

Please note: Replies to this e-mail will not be answered. If you require assistance please visit our website for contact information.

Your order was split into multiple shipments for faster processing. The shipments are shown below with the products in each shipment.  
 Order Number: **102045**

**There was a problem with the credit card used for this order. Please contact Customer Service as soon as possible.**

**Note from Customer Service:** This is a test invoice/customer service note. You don't need to do anything, but we are watching you.

---

Shipment 1022045001: Ready to be picked up

Qty	Web Id	Description	Status
1	00035	<a href="#">"RATEX Polo" test' ©™ © - Small Lt.blue</a>	Ready to be picked up

---

Shipment 1022045002: **Credit card problems - Please contact Customer Service**

Qty	Web Id	Description	Status
1	00035	<a href="#">"RATEX Polo" test' ©™ © - Small Lt.blue</a>	Processing

Powered by eRATEX

**From:** Sales [mailto:eratem@ratex.com]  
**Sent:** Friday, February 21, 2014 12:45 PM  
**To:** Jessica Sobonya  
**Subject:** Credit Card Declined Notification for Order 800233 (TEST MODE)

**Internet Order Number:** 800233  
**Shipment Number:** 0002316001  
**Authorization Date:** 2/21/2014 12:42:44 PM  
**Authorization Status Code:** 202  
**Authorization Status Message:** Expired card. You might also receive this if the expiration date you provided does not match the date the issuing bank has on file.

## OTHER FEATURES

The eRATEX Admin has numerous other features and functionality. Some of these features are described below. For a complete list of features in eRATEX Admin, please refer to the AspDotNetStoreFront documentation located [here](#). Please note that RBS does not support every single feature in the eRATEX Admin interface. If you have questions about an eRATEX Admin feature, please [contact RBS](#).

## SALE PRICES

Items on eRATEX can be put on sale:



RBS Pen w/Logo

\$5.99  
 On Sale For: \$4.49

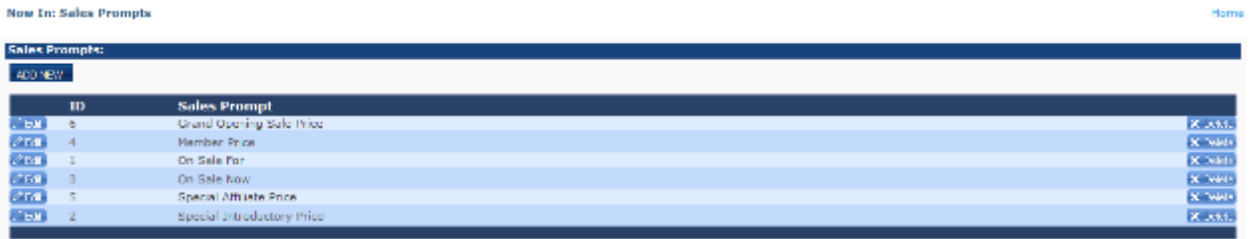


Sale prices must come from VisualRATEX by putting the item on a Price Change Directive (PCD) to change the price by a set amount for a set period of time. While there is a “Sale Price” field for each product in the eRATEX Admin that can be edited, sale prices should NOT be manually entered in the eRATEX Admin. Due to the integration between VisualRATEX and eRATEX, any manual sale prices entered in the eRATEX Admin will be cleared when a product update is sent from VisualRATEX to eRATEX. Therefore, any sale prices must come from VisualRATEX in the form of a PCD.

An on-sale product will show an “On Sale For” prompt with the sale price in red displayed at the category level and at the product level. The prompt and text color are controlled by AppConfigs and can be changed:



Admin\_DefaultSalesPromptID -- this AppConfig controls which on-sale prompt will display when a product is on sale. The default is “1” or “On Sale For”. This can be changed to a different prompt by entering a different ID number. Sale prompts are maintained at the following menu path in the eRATEX Admin: Configuration > Pricing & Promotions > Sale Prompts:



The default sale prompts are listed. Additional sale prompts can be added by clicking the “ADD NEW” button.

OnSaleForTextColor – this AppConfig controls the text color of the sales prompt. The default is “red”. This can be changed by entering a different color name or HTML color code.

## PERSONALIZATION

Items on eRATEX can be personalized. To set up personalization, view a product in the eRATEX Admin. At the bottom of the Add/Edit Product page, there is a “Requires Text Field”, as shown below:



Set this to a “Yes” to enable personalization. In the “Field Prompt”, enter some information that will display next to the field, for example, the word “Personalize”. When a customer views the product, they will see the Field Prompt and a box to enter the personalization, as shown below:

### RBS PEN - PERSONALIZE

\$7.50

Quantity:

Personalize:







If personalization is turned on, text must be entered into the text box to add the item to the shopping cart.

## FEES

Any GM item on eRATEX can be charged an additional fee. Personalized items (explained above) may need to charge an additional fee; in the state of California, all computers and electronics must be charged a recycle fee. A fee can be added to any GM SKU by creating a GM Auto Fee and assigning it to a SKU in SKU Maintenance, as shown below:

**Auto Fee**   ▼

Once assigned, the fee is sent to eRATEX automatically. When a customer adds an item with a fee to their shopping cart, the fee will display in the cart and throughout the checkout process, as shown below. An image can be uploaded for the fee by searching for the fee in the Product Manager, located under the Products > Product Manager menu.

Shopping Cart		Quantity	SubTotal
Product			
 iPod Nano-Pink SKU: 10057 Engraving (1-3 letters) JKS Item Notes: <input type="text"/>	1	Delete	\$149.00
 Recycle Fee	1		\$10.00

[Update Cart](#)

## COUPONS

NOTE: Coupons are available in eRATEX 3.3 and prior.

Coupon codes can be set up in the eRATEX Admin under Configuration > Pricing & Promotions > Coupons. The coupon can be applied to the order subtotal or to specific products. The coupon can be for a percentage amount off or dollar amount off. Coupons can also include free shipping, a minimum order amount, and they can expire after “n” uses.

A customer can enter a coupon code in the “Coupon or Gift Card” field in the shopping cart. When a coupon is successfully applied to an order, the discount is applied, and the discounted amount is sent to Order Fulfillment.

## QUANTITY DISCOUNTS

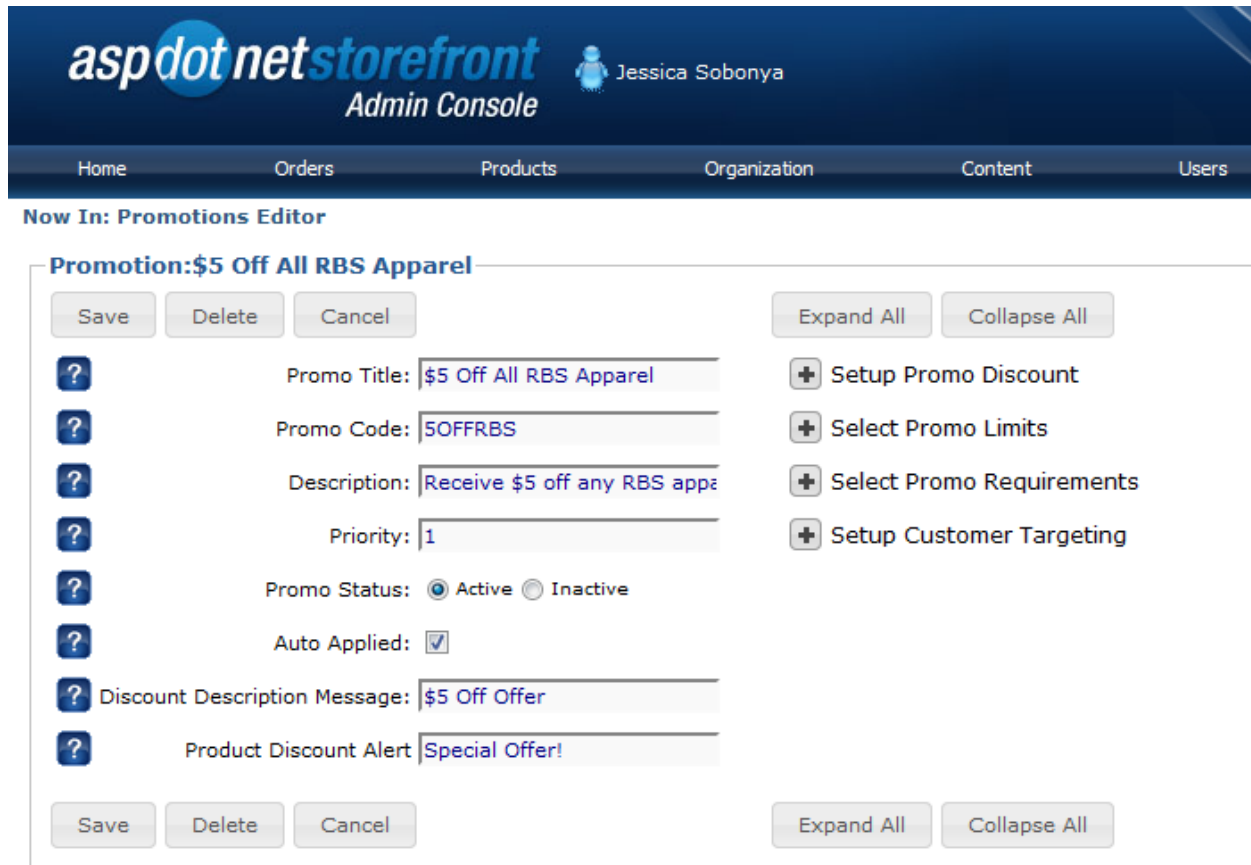
Quantity discounts can also be set up in the eRATEX Admin under Configuration > Pricing & Promotions > Quantity Discounts. Quantity discounts give customers discounts for buying in bulk. For example, if a customer buys 2 of an item, they can get 25% off. If they buy 5, they can get 50% off, and so on. A Quantity Discount table can be created with as many low/high values and amount off values.

## PROMOTIONS

NOTE: Promotions are available in eRATEX 4.1.

Items in eRATEX can be put on promotion by using a promotions engine located under Configuration > Pricing & Promotions > Promotions.

Click “Add New Promo” to add a new promotion for a product or products, as shown below:



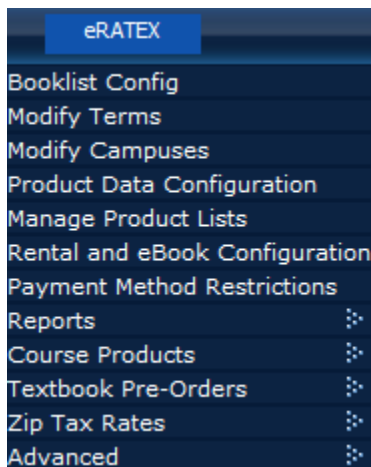
eRATEX  
Promotions Engine

Promotions can be defined in a number of new and exciting ways. For a full list of promotions features, please see the AspDotNetStoreFront documentation, located here: <http://manual.aspdotnetstorefront.com/p-1581-promotions.aspx>

## eRATEX MENU

In eRATEX 3.0, an “eRATEX” menu option displays in the top right of the screen. This area is where all RBS-made pages/functionality reside. The following section describes each screen under the eRATEX menu. Please read everything carefully, as there is a lot of important information here.

**NOTE:** The eRATEX Menu options reflect the eRATEX 4.4 release:



Past eRATEX releases (3.0 – 4.3) may have different menu paths and screens. For a complete list of features in each eRATEX patch release, please see the eRATEX 3 Overview and eRATEX 4 Overview Guides in the IssueTrak Knowledge Base.

## BOOKLIST CONFIGURATION

The Booklist Configuration displays a series of settings that control various features on the Booklist page. Each setting is described below. To access this page, go to eRATEX > Booklist Config:

Now In: Booklist Configuration

The options on this page allow you to configure the behavior of the booklist page. Holding your mouse over each option will display additional information.

- Textbook Inventory Handling:  IGNORE INVENTORY - **Always display** text and **always sell** text  
 HONOR INVENTORY - **Only display** text and **only sell** text if adequate inventory  
 HONOR INVENTORY - **Always display** text and **only sell** text if adequate inventory  
 IGNORE INVENTORY - **Always display** text and **never sell** text

Display Out of Stock Message:  No  Yes

Out of Stock Message:

Display Expected Date:  No  Yes

Disable New Textbook Purchase:  No  Yes

Show Product Detail Overlay:  No  Yes

Show ISBN:  No  Yes

Show Author:  No  Yes

Show Description:  No  Yes

Maximum Description Length:

Show Publisher:  No  Yes

Show Volume:  No  Yes

Show Edition:  No  Yes

Show Copyright:  No  Yes

Show Course Comments:  No  Yes

Hide Global Substitution Popup:  No  Yes

- Substitution Behavior:  Allow Customer Selection  
 Always Substitute  
 Never Substitute

- Rental Substitution Behavior:  Allow Customer Selection  
 Always Substitute  
 Never Substitute

Restrict Textbook Purchases to Booklist:  No  Yes

Restrict to Single Campus:  No  Yes

Course Sort Method:  Sort courses alphabetically  
 Strip all non-numeric values from course and sort numerically

Section Sort Method:  Sort sections alphabetically  
 Sort numeric sections numerically, then all others alphabetically

Display-Only Term Message:

All Section Name:

Hide Enrollments with All Section:  No  Yes

Automatically Add All Section:  No  Yes

Enable Booklist Personalization:  No  Yes

Booklist Personalization Type:  Topic Only  
 Student Schedule Import  
 Student Authentication [configure](#)  
 Schedule Import With Student Authentication [configure](#)

Custom Redirect URL:

Clear Course List on Error:  No  Yes

Enable Course List Builder:  No  Yes

**Set Display Order for Textbooks:**

New:

Used:

New Rental:

Used Rental:

eBook:

Enable Affiliate Rentals:  No  Yes

Show "No Rentals" Message:  No  Yes

Override Out Of Stock Rental:  No  Yes

Affiliate Rentals Popup Width:

Affiliate Rentals Popup Height:

Affiliate Rental Provider:  Follett [configure](#)

Enable Course List Encryption:  No  Yes

Encrypted Course List Algorithm:

Encrypted Course List Data:

Save Settings

*eRATEX*  
*Booklist Configuration Page*

Textbook Inventory Handling – This controls how textbooks will display to students on the booklist page. There are four options:

- Ignore Inventory – Always display text and always sell text. (All textbooks will display to the student, regardless of inventory.)
- Honor Inventory – Only display text and only sell text if adequate inventory. (Only textbooks with inventory will display to the student; textbooks with inadequate inventory will be hidden.)
- Honor Inventory – Always display text and only sell text if adequate inventory. (All textbooks will display to the student, but only textbooks with inventory can be purchased. Textbooks with inadequate inventory will be grayed out/unselectable.)
- Ignore Inventory – Always display text and never sell text. (All textbooks will display to the student, but all textbooks will be grayed out/unselectable.)

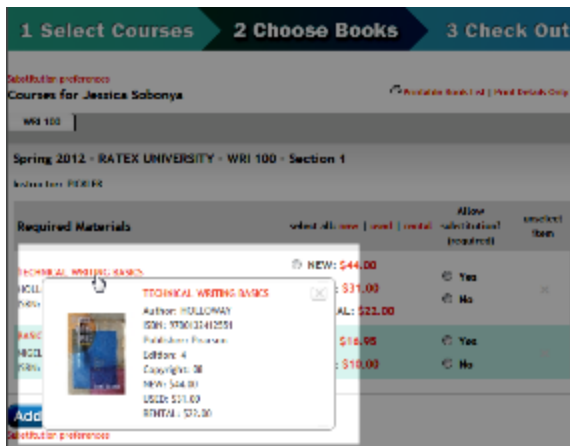
Display Out of Stock Message & Out of Stock Message – Textbooks that have no inventory can display an out of stock message. Typically, the message is “Out of Stock,” but this can be modified in the “Out of Stock Message” field.

Display Expected Date – If a textbook is on a purchase order, and the purchase order has an Expected Date, the Expected Date will display next to the textbook on the Booklist page.

Disable New Textbook Purchase – If a used textbook is available, the student will be unable to purchase the new textbook. Used books will take precedence over new books; the new textbook will be purchasable when there is no longer any used in stock.

Show Product Detail Overlay – When viewing the textbooks on the Booklist page, the textbook image and related information (author, ISBN, publisher, copyright, etc.) can display in a popup window/overlay, or directly on the page.





Show ISBN, Author, Description, Publisher, Volume, Edition, Copyright, Course Comments – This option will show or hide the relevant information on the Booklist page.

Hide Global Substitution Popup – When a student goes to the Booklist page for the first time, depending on the substitution behavior, they have to read and agree to a substitution popup. This option controls whether the Substitution Popup will display automatically to the student.

Substitution Behavior – Textbooks can be substituted, or not substituted, based on the selection defined here:

- Allow Customer Selection – This option allows the customer to choose whether or not to substitute a textbook. On the Booklist page, a Substitution option will display next to each textbook. A student must make a substitution selection before the book can be added to their shopping cart.
- Always Substitute – Textbooks will always have the option to be substituted; the student will not get a choice. The Substitution option will be hidden from the Booklist page.
- Never Substitute – Textbooks will never be substituted; the student will not get a choice. The Substitution option will be hidden from the Booklist page.

Rental Substitution Behavior – New and used rental textbooks can be substituted just like new and used books, based on the selection defined here:

- Allow Customer Selection – This option allows the customer to choose whether or not to substitute a new or used rental textbook. On the Booklist page, a Substitution option will display next to each textbook. A student must make a substitution selection before the book can be added to their shopping cart.
- Always Substitute – New and used rental textbooks will always have the option to be substituted; the student will not get a choice. The Substitution option will be hidden from the Booklist page.

- Never Substitute – New and used rental textbooks will never be substituted; the student will not get a choice. The Substitution option will be hidden from the Booklist page.

Restrict Textbook Purchases to Booklist – Customers will be unable to purchase textbooks by searching for them and using the Product Detail page. Textbooks must be purchased by going through the Counselist Builder and Booklist pages.

Restrict to Single Campus – If multiple campuses display on the Counselist Builder page, once a customer selects a campus and begins making course selections, they will be unable to select a different campus to make additional selections. The student is restricted to one campus selection on the Counselist Builder page.

Course Sort Method – Some bookstores have alphanumeric courses (i.e. 1B, 11A, 5C). There are two options to sort the courses on the Counselist Builder page:

- Sort Courses Alphabetically – Courses will be displayed in alphabetical order.
- Strips All Non-Numeric Values from Course and Sort Numerically -- Courses will be displayed in numerical order.

Section Sort Method – Some bookstores have alphanumeric sections (ex. 100A, A500, 15C). There are two options to sort the sections on the Counselist Builder page:

- Sort Sections Alphabetically – Courses will be displayed alphabetically.
- Sort Numeric Sections Numerically, Then All Others Alphabetically -- Numeric-only sections are sorted first, and then any sections with letters are sorted alphabetically.

Display-Only Term Message – In the Modify Terms page, if the Term Status is set to “Display”, the message entered here will display on the Booklist page to the student.

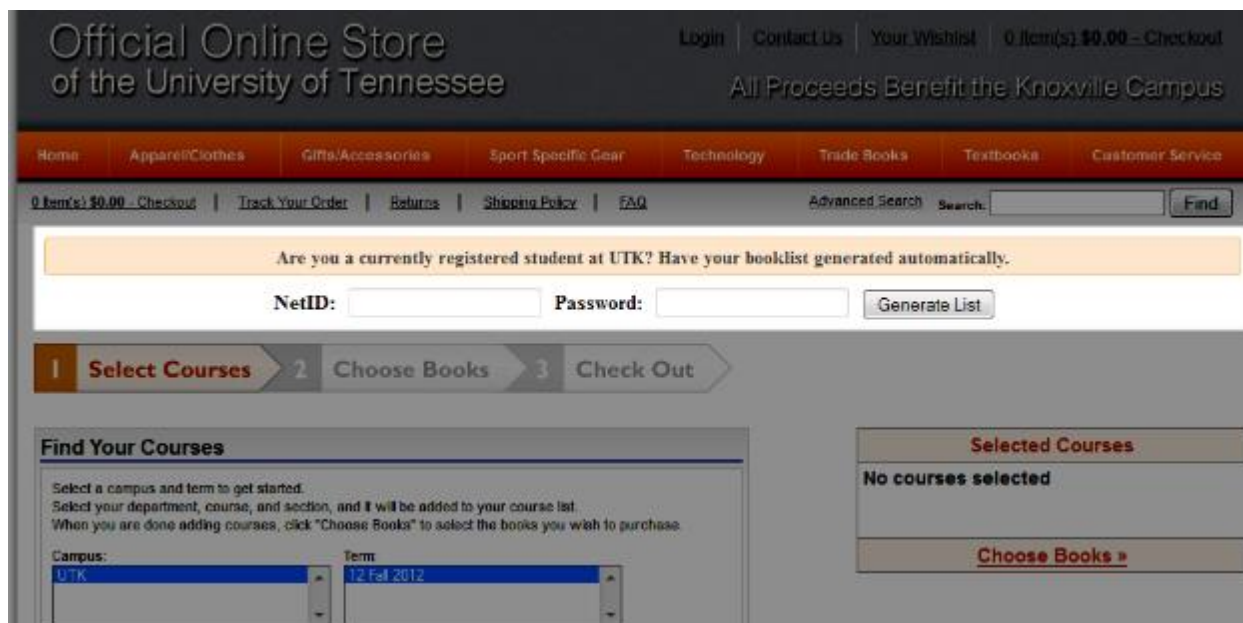
All Section Name – Any “ALL” sections that display on eRATEX can be called something else by entering text into this field. For example, the bookstore may want “ALL” to display as “ALL SECTIONS”.

Hide Enrollments with All Section – If enrollments (TX.CEF) are sent to eRATEX, and a course (TX.CRF) is created with an “ALL” section, the enrollments will not be shown.

Automatically Add All Section – If there are courses (TX.CEF) that have a combination of sections and an “ALL” section, the “ALL” section will be added to the student’s booklist instead of another section.

Enable Booklist Personalization – *Background:* For schools who would like to offer booklist personalization (i.e. the student’s course list is automatically populated on the booklist page instead of having to manually

select courses from the course list), some schools may wish for a student to be authenticated and the personalized booklist generated when the student accesses the courselistbuilder page itself. One eRATEX user, The University of Tennessee, was able to do this by creating an iFrame within the courselistbuilder page; the iFrame communicates to a University web site/server requesting the student to be authenticated. Once the authentication is performed, the student's course schedule is requested from a service like Banner and the resulting data is returned to eRATEX. Here is a screenshot of the University of Tennessee's courselistbuilder page:



RBS has taken this idea and has given the eRATEX user choices on how to use this logic by setting the following parameters:

? Enable Booklist Personalization:  No  Yes

? Booklist Personalization Type:

- Topic Only
- Student Schedule Import
- Student Authentication [configure](#)
- Schedule Import With Student Authentication [configure](#)

Enable Booklist Configuration must be set to Yes to use the logic.

Booklist Personalization Type -- there are four Booklist Personalization Types to choose from:

1. Topic Only – This option allows the user to create a unique topic to build the iFrame for the student’s authentication and personalized booklist generation. The topic must be called BooklistPersonalization. This is the option that RBS recommends, as it is something that the bookstore can configure and requires no additional logic.
2. StudentScheduleImport – This option requires the university to load a student schedule file from a specified location to the eRATEX database on a daily basis, and have the student schedules populate from this file, instead of having direct communication with a service like Banner. This option requires the Student Schedule File Import page, located under the eRATEX menu, to be defined:

**Now In: Student Schedule File Import**

**Student Schedule File Import:**

File Path:

Ignore First Row:

Column Delimiter:

Please enter the column to fields mapping. For fields not included in the import file, leave the Position field blank or set it to 0, and optionally enter a static value to be used.

Column Name	Import File Position	Static Value
Student ID:	<input type="text"/>	
Catalog ID:	<input type="text"/>	
Term:	<input type="text"/>	<input type="text"/>
Campus:	<input type="text"/>	<input type="text"/>
Dept:	<input type="text"/>	
Course:	<input type="text"/>	
Section:	<input type="text"/>	

*eRATEX  
Student Schedule File Import*

The file path, column delimiter, and file positions for important columns must be identified. If Term or Campus is not identified in the file, they can be added in the Static Value fields; these fields are required in eRATEX. The settings can then be saved, or saved and the information imported to the eRATEX database. The student schedule file must be continuously updated to the eRATEX database in order to have the most up-to-date student schedules for the personalized booklists.

3. Student Authentication – The student authentication process can be used to authenticate a student and generate the student’s booklist. Some configuration is required to enable this functionality; **please contact RBS if you are interested in using student authentication with Booklist Personalization.**
4. Schedule Import with Student Authentication – If uploading a student schedule import to eRATEx (option #2), student authentication can also be used for this process. Some configuration is required to enable this functionality; **please contact RBS if you are interested in using student authentication with the Student Schedule Import.**


Clear Course List On Error – If Student Schedule Import is the selected Booklist Personalization Type, and there is an error loading the data and/or the course the student selected could not be found, the student’s course list can be cleared by setting this to Yes.

Set Display Order for Textbooks – This option controls the display order of all textbook variants, including new and used rental textbooks, on the booklist page and product detail page.

Enable Affiliate Rentals – *Background:* The Booklist page has the ability to integrate with Follett’s SKYO rental program and show “affiliate rentals”. If a book on the Booklist page is available to rent from Follett, an “Affiliate Rentals Available” link will display, as shown below:

**SPRING 2013 - MAIN - COMM 100 - Section 1**

Instructor: WILEY, SAM

Required Materials	select all: <a href="#">new</a>   <a href="#">used</a>   <a href="#">rental</a>	Allow substitution? (required)	unselect item
 <p><b>BUSINESS COMMUNICATION TODAY</b>            Author: BOVEE            ISBN: 9780138155391            Publisher: Pearson            Education            Edition: 10            Copyright: 10</p>	<p><input type="radio"/> <b>NEW: \$173.75</b></p> <p><input type="radio"/> <b>USED: \$130.25</b></p> <p><b><u>Affiliate Rentals Available</u></b></p>	<p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>	<p><input type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>

When the link is clicked, a pop-up window will display the available rental options, as shown below:

Affiliate Book Rental Options
[close](#) or Esc Key

### Affiliate Rental Topic Content Place Holder

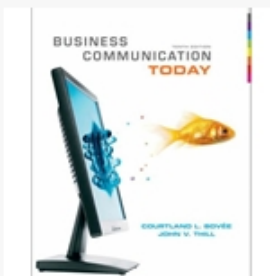
**Textbook Affiliate Rental Pricing**

The Bookstore is proud to offer an expanded textbook rental program through our Textbook Rental Affiliate. Please note the following.

If you choose to rent textbooks through the Affiliate website and also purchase from the Bookstore's website, you will need to complete separate checkouts on each website.

Our Textbook Rental Affiliate website does not accept your student card as a form of payment.

[View Affiliate Rental Cart](#)



**BUSINESS COMMUNICATION TODAY**

SKU: 9780138155391

30 day rental	\$ 14.45	<input type="button" value="Add to Rental Affiliate Cart"/>
45 day rental	\$ 15.17	<input type="button" value="Add to Rental Affiliate Cart"/>
60 day rental	\$ 15.93	<input type="button" value="Add to Rental Affiliate Cart"/>
90 day rental	\$ 16.73	<input type="button" value="Add to Rental Affiliate Cart"/>
125 day rental	\$ 17.57	<input type="button" value="Add to Rental Affiliate Cart"/>

[Close Affiliate Pricing](#)

[Substitution preferences](#)

eRATES  
Affiliate Rental Options

The student can select “Add to Rental Affiliate Cart” to add the affiliate rental to a separate shopping cart on Follett’s web site and check out.

To enable this logic, set the following parameters on the Booklist Configuration page:

Enable Affiliate Rentals – Set to “Yes” to turn on the Rental Affiliate logic.

**Show “No Rentals” Message** – If there are no rental options available from Follett for a particular title, a “No Rentals” message can display. The message can be modified by editing the affiliaterental.norentals string resource.



Override Out of Stock Rental – If an in-store rental is out of stock, the in-store rental will be hidden in favor of displaying the affiliate rental option. Set this parameter to “Yes” to enable this option.

Affiliate Rentals Popup Width & Height – These options display the height and width of the affiliate rental popup window.

Affiliate Rental Provider -- The affiliate rental provider is shown here. Click the “Configure” link to configure the API call and cart URL for the rental affiliate.

## MODIFY TERMS

In eRATEX, term data can be shown or hidden at the bookstore’s discretion by using the following menu path: eRATEX > Modify Terms. This page lists all terms that have been uploaded to eRATEX from VisualRATEX:

Term ID	VR Term Code	Term Name	Term Status	Rental Agreement Topic	Rental Return Date	University Term Code	Display Order
133		SLUMMER 2013	Current	RATEXRentalAgreement	08/23/2013		1
132		SPRING 2013	Prior	RATEXRentalAgreement	05/15/2013		1
131		SPRING 2013	Prior	RATEXRentalAgreement	05/15/2012		1
121		WINTER 2012	Prior	RATEXRentalAgreement	02/01/2012		1

Click the Edit button to update the term status. Changing the Term Status to “Current” will display that term in the Courselist Builder page so a student can select their courses and purchase textbooks. Changing the Term Status to “Hidden” will not display that term in the Courselist Builder page. Changing the Term Status to “Display” will display the term in the CourseList Builder page, but the student will not be able to purchase any textbooks.

If multiple terms are set to “Current”, the display order can be changed by modifying the “Display Order” to the right of the page.

Before publishing a term and making the courses viewable to students, review the Booklist Configuration settings to make sure that the books, substitution preferences, etc., will display correctly.

TIP: If selling rentals online, a Rental Agreement topic must be created and selected here, and a Rental Return Date must be defined. If a Rental Return Date is not defined or if it is in the past, rentals will not be displayed. This allows the ability for multiple terms to show or hide rental information as necessary. If a term is set to “Display,” rentals will show regardless of the Rental Return Date setting, for HEOA compliance.

## MODIFY CAMPUSES

A bookstore may have multiple campuses to display on the Booklist page. The Modify Campuses page, located under eRATEX > Modify Campuses, allows the user to publish/unpublish campuses and change the display order of campuses on the CourseList Builder page:



## PRODUCT DATA CONFIGURATION

The Product Data Configuration page, located at eRATEX > Product Data Configuration, allows the bookstore to configure their Bowker Books In Print (BIP) credentials and settings, as well as the Maintain Product Data Elements on Web settings.



asdotnetstorefront
Jessica Sabonya

Home
Orders
Products
Organization
Content
User

Now In: Product Data Configuration

**Cover Images:**

Provider: BOWKER [configure](#)

**Metadata:**

Provider: BOWKER [configure](#)

Enabled: Default:  No  Yes [?](#)

Refresh Metadata on Updates: Default:  No  Yes [?](#)

Trade Book Elements: Default:  Name  Summary  Description  Volume  Edition  Weight [?](#)

Textbook Elements: Default:  Name  Summary  Description  Volume  Edition  Weight [?](#)

**Maintain Product Data Elements on the Web:**

GM Elements: Default:  Name  Summary  Description  VariantName  VariantDescription  VariantWeight [?](#)

Trade Book Elements: Default:  Name  Summary  Description  VariantName  VariantDescription  VariantWeight [?](#)

Textbook Elements: Default:  Name  Summary  Description  VariantName  VariantDescription  VariantWeight [?](#)

**Miscellaneous Configuration:**

Hide Single GM Variant Name: Default:  No  Yes [?](#)

Copyright

eRATEX  
Product Data Configuration

*Background:* Prior to eRATEX 3.0, the Bowker Books In Print (BIP) service could be used to display textbook and tradebook images on an eRATEX site. The process required the user to fill in AppConfigs with their BIP information; the images would automatically display on the site when the textbooks or tradebooks were added to the site. With eRATEX 3.0, the process has been modified to give the user more control not only in regards to images, but other data as well, like the textbook/tradebook name, author, description, volume, edition, and weight. When this information is properly defined, the textbooks or tradebooks will automatically populate this information as they are added to eRATEX, which can save a considerable amount of time for the web staff.

Each section of the screen is described below.

### Cover Images

Provider – Bowker Books In Print is the provider. Click the “Configure” link to enter the Bowker BIP username and password.

### Metadata

Provider – Bowker Books In Print is the provider. Click the “Configure” link to enter the Bowker BIP username and password.

Enabled – Select Yes to enable metadata updates from Bowker BIP. This will allow the checked tradebook and textbook elements to be updated from Bowker BIP.

Refresh Metadata on Updates – When metadata is enabled for the first time, all existing textbooks and tradebooks need to be refreshed from VisualRATEX to eRATEX so the metadata will display for those products. Set this option to “Yes” and refresh the textbooks and tradebooks from VisualRATEX to eRATEX. When the refresh is complete, set this to “No.”

Tradebook Elements – several tradebook elements can be updated from Bowker BIP. They include name (title), summary (author), description, volume, edition, and weight. Place a checkbox next to the element that you want to get from Bowker BIP.

Textbook Elements -- several textbook elements can be updated from Bowker BIP. They include name (title), summary (author), description, volume, edition, and weight. Place a checkbox next to the elements to download from Bowker BIP.

### Maintain Product Data Elements on Web

The bookstore may choose to maintain certain data elements on the web instead of VisualRATEX. Data elements from GM, Trade and Text can be maintained on the web.

GM Elements – several GM elements can be maintained on eRATEX. They include Name, Summary, Description, Variant Name, Variant Description, and Variant Weight. Place a checkbox next to the elements to maintain on eRATEX.

Tradebook Elements – several trade elements can be maintained on eRATEX. They include Name, Summary, Description, Variant Name, Variant Description, and Variant Weight. Place a checkbox next to the elements to maintain on eRATEX.

Textbook Elements – several textbook elements can be maintained on eRATEX. They include Name, Summary, Description, Variant Name, Variant Description, and Variant Weight. Place a checkbox next to the elements to maintain on eRATEX.

### Miscellaneous Configuration

Hide Single GM Variant Name – For single variant GM products that have no color or size defined, the Product Name and Variant Name are identical, which is shown to the customer when the item is added to the customer’s shopping cart. This parameter will use a blank variant name, so this duplication will not be shown to the customer.

*Showing Variant Name:*

Shopping Cart		
Product	Quantity	SubTotal
<b>RBS Pen-Rbs Pen</b> SKU: 10077	1 <a href="#">Delete</a>	\$5.99

*Hiding Variant Name:*

Shopping Cart		
Product	Quantity	SubTotal
<b>RBS Pen</b> SKU: 10077	1 <a href="#">Delete</a>	\$5.99

Tip: For the blank variant name to take effect, GM products must be refreshed from VR to eRATEX.

## **RENTAL AND eBook CONFIGURATION**

The Rental and eBook Configuration page, located at eRATEX > Rental and eBook Configuration, allows the bookstore to maintain rental and eBook settings.

**DID YOU KNOW?**

The Textbook Rental Configuration section in eRATEX 4.1 is compatible with new/used rentals and collateral collection with VisualRATEX 19.2. The section is also “backwards compatible” with the “old” rental functionality in VisualRATEX 19.1 and prior. Read each rental parameter below and set them according to your VR release.

Home	Orders	Products	Organization	Content	Users
<b>Now In: Rental and eBook Configuration</b>					
<b>eBook Configuration:</b>					
?	<b>Disabled:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes			
?	<b>Activation Email BCC List:</b>	<input type="text"/>			
?	<b>Show eBook SKU on Emails:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes			
	<b>eBook Vendors:</b>	EC - CourseSmart	<a href="#">configure</a>		
		ES - CafeScribe	<a href="#">configure</a>		
<b>Textbook Rental Configuration:</b>					
?	<b>Disabled:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes			
?	<b>Out of Stock Option:</b>	Rental			
	<b>Require Collateral:</b>	<input checked="" type="radio"/> For both in-store and vendor owned textbook rentals <input type="radio"/> For vendor owned textbook rentals only <input type="radio"/> Do not require collateral at all			
?	<b>Hide Damage Fee:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes			
?	<b>Hide Purchase Fee:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes			
?	<b>Honor New Available Online:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes			
?	<b>Honor Used Available Online:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes			
<a href="#">Submit</a>					

eRATEX  
Rental and eBook Configuration

Each section of the screen is described below.

#### eBook Configuration

Disabled – this parameter shows or hides eBooks on the booklist page.

Activation Email BBC List – any e-mail addresses entered here will be copied on all order update e-mails sent to students that have eBook activation codes. Separate multiple e-mail addresses by commas.

Show eBook SKU on Emails – if set to yes, the Order Update e-mail will display the eBook SKU. If set to No, the Order Update e-mail will display the parent ISBN.

eBook Vendors – eRATEX currently supports EC – CourseSmart and ES – CafeScribe. These parameters are set up by an RBS programmer prior to a client using eBooks on eRATEX

#### Textbook Rental Configuration

Disabled – this parameter shows or hides Rentals on the booklist page.

Out of Stock Option – this parameter controls when rental variants are shown as “out of stock”. There are four options:

- Rental – Rental variants will show as “out of stock” when the rental inventory is out of stock.
- New – Rental variants will show as “out of stock” when the new inventory is out of stock.
- Used – Rental variants will show as “out of stock” when the used inventory is out of stock.
- NewAndUsed – Rental variants will show as “out of stock” when both the new and used inventory is out of stock.

Require Collateral – If the bookstore is on **VisualRATEX 19.2** or higher, collateral can be collected for new/used rental purchases. The Require Collateral parameter can be defined in one of the following ways:

For both in-store and vendor owned textbook rentals – Collateral is required for all rental purchases (Store and Vendor rentals).

For vendor owned textbook rentals only – Collateral is required for Vendor rental purchases ONLY.

Collateral is not required for Store rental purchases.

Do not require collateral at all – Collateral is not required for rental purchases.

**TIP:** eRATEX 4.1 is “backwards compatible” with older releases of VisualRATEX which use the rental fee and rental replacement fee. If the bookstore is on **VisualRATEX 19.1** or prior, the Damaged and Purchase Rental fees are not supported and should be hidden by modifying the following parameters:

Hide Damage Fee – Set this parameter to Yes to hide the Damage fee.

Hide Purchase Fee – Set this parameter to Yes to hide the Purchase fee.

Honor New Available Online – **Set this parameter to Yes to have new rentals honor the “Available Online”** setting for the new book. Textbooks must be refreshed to the site for changes to take effect.

Honor Used Available Online -- **Set this parameter to Yes to have used rentals honor the “Available Online”** setting for the used book. Textbooks must be refreshed to the site for changes to take effect.

For more information about new/used rental functionality, please see the [Rental Enhancements section](#).

## REPORTS

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AspDotNetStoreFront is moving to a new report interface, and the reports were removed under the Orders > Reports menu. The reports still exist, and several clients use them, so RBS has added them back under eRATEX > Reports.

## COURSE PRODUCTS

---

Several universities offer non-textbook items on courses; for example, study guides, supplies, iClickers, or other items that are necessary for a particular course. These items can be associated to courses on eRATEX, so the student can see not only their required/optional textbooks, but also any other products that an instructor deems necessary for a course. How to assign and remove course products is explained in this section. Course Types will also be reviewed.

## ASSIGN PRODUCTS TO COURSES

---

Course products can be assigned to a course by using the following menu option: eRATEX > Course Products > Assign Products To Courses:

Now In: Course Product Builder

**Assign Products to Courses:**

Term:

Campus:

**Departments** [Select All](#) | [Clear All](#)

- ART - ART
- BIOAP - BIO -- ANIMAL PHYSIOLOGY & ANATOMY
- BIOG - BIOLOGY -- GENERAL
- BIOGD - BIO -- GENETICS & DEVELOPMENT

**Load Courses**

**Courses** [Select All](#) | [Clear All](#)

- /142/CU/ART/100/1
- /142/CU/ART/100/2
- /142/CU/ART/100/3
- /142/CU/ART/200/1
- /142/CU/ART/200/2
- /142/CU/ART/200/3

Product Search:

**Products** [Select All](#) | [Clear All](#)

- 00037 - iClicker

Assign Products as:

Select a term and campus. Select one or more departments and click Load Courses. Please note that selecting multiple departments at once may cause a large number of courses to load and may impact performance. Select as few departments as necessary. Select the course or courses that you want to assign a product to, and then search for the product in the Product Search field. Select the product, and then say whether or not the product is required, optional, or another course product type (explained below). When finished, click the Assign Products To Courses button to assign the product to the selected courses.

## REMOVE PRODUCTS FROM COURSES

Once a product is assigned to a course, it can be removed from a course by using the following menu option:  
 eRATEx > Course Products > Remove Products from Courses:

**Now In: Course Product Builder**

### Remove Products from Courses:

Term:  ▼  
 Campus:  ▼

#### Departments [Select All](#) | [Clear All](#)

- ART - ART
- BIOAP - BIO -- ANIMAL PHYSIOLOGY & ANATOMY
- BIOG - BIOLOGY -- GENERAL
- BIOGD - BIO -- GENETICS & DEVELOPMENT

**Load Courses**

#### Courses

- /142/CU/ART/100/1
- /142/CU/ART/100/2
- /142/CU/ART/100/3
- /142/CU/ART/200/1
- /142/CU/ART/200/2
- /142/CU/ART/200/3
- /142/CU/BIOAP/100/1

#### Products [Select All](#) | [Clear All](#)

No products found for this course

**Remove Products from Courses**

Select a term and campus. Select one or more departments, and click Load Courses. Please note that selecting multiple departments at once may cause a large number of courses to load and may impact performance. Select as few departments as necessary. Select the course that you want to remove a product from, and then select



the product or products to remove. Click the Remove Products from Courses button to remove the product from the course.

## COURSE PRODUCT TYPES

Products that are assigned to courses can have a different product type other than “Required” or “Optional.” The bookstore can add as many additional course product types that they like using the following menu option: eRATEX > Course Products > Course Product Types:

### Now In: Course Product Types

Maintain course product types. "Required" and "Optional" are system values and cannot be removed, although their Display Order can be changed. You can change the text displayed on the Booklist page for each type by adding or editing a string resource: `booklist.courseproducttype.typeid` For example, to change the text for the "Optional" type, the string resource name is: `booklist.courseproducttype.2`

**Course Product Types:**

ADD NEW

	ID	Name	Published	Display Order	Is Default	
	1	Required	Yes	1		
	2	Optional	Yes	2		
	3	Study Aid	Yes	3	Yes	Delete

To add a new course product type, click the ADD NEW button. Enter the name of the Course Product Type, the Display Order, and Set the Published flag to Yes.

The Required and Optional product types are required for textbooks and cannot be removed. Their Display Order can be changed, and the Required and Optional text can be changed by adding/editing string resource: `booklist.courseproducttype.typeid`.

A course product type can be set as a default by setting the Is Default flag to Yes.

Once the course product types have been added, they can be assigned to products by selecting the course product type from the “Assign Product As” dropdown in the Assign Products To Courses screen. If a course product type default is defined, the default will display in “Assign Products As” dropdown.

## TEXTBOOK PRE-ORDERS

Textbook pre-orders allows students to pre-order courses on eRATEX. Students can select courses from a list or by manual entry, and check out through the normal checkout flow. All pre-orders are viewable in the eRATEX Admin and will be converted to internet orders when certain preferences are met.

The textbook pre-order process is explained later in this document. [Click here](#) to advance to the textbook pre-order section of this document.

## ZIP TAX RATES

Some bookstores calculate sales tax by zip code. It can be cumbersome to use the eRATEX Tax Rates by Zip Code screen because a user has to enter every zip code, one by one, as well as the tax rate for each zip code. To help with this task, two screens located under eRATEX > Zip Tax Rates, have been added to make the process easier. Each screen is described below.

## ZIP TAX RATE IMPORT

The Import screen allows a user to quickly upload zip code rates from a file like a .txt file or Excel document. The file must have 3 columns: Zip Code, Tax Class ID, and Tax Rate.

**aspdotnetstorefront Admin Console** Jessica Sobonya

Home Orders Products Organization Content

**Now In: Zip Tax Rates**

**Zip Tax Rate Import:**

[Switch to Export Mode](#)

The Import file must have 3 columns in this order: Zip Code, Tax Class ID, Tax Rate.  
 The Tax Rate should be specified in decimal form, so a 10.25% tax rate would be 10.25, not 0.1025.  
 If your file has column headers, be sure to check the "Ignore First Row" checkbox.  
 If your file is tab-delimited, specify "\t" (no quotes) in the Column Delimiter box.

Zip Tax File:

Ignore First Row:

Column Delimiter:

Import for Country:  ▼

Fill in the following fields:

Zip Tax File – Browse for the sales tax file on a computer.

Ignore First Row – Select the checkbox to ignore the first row of the document, if the first row has column names.

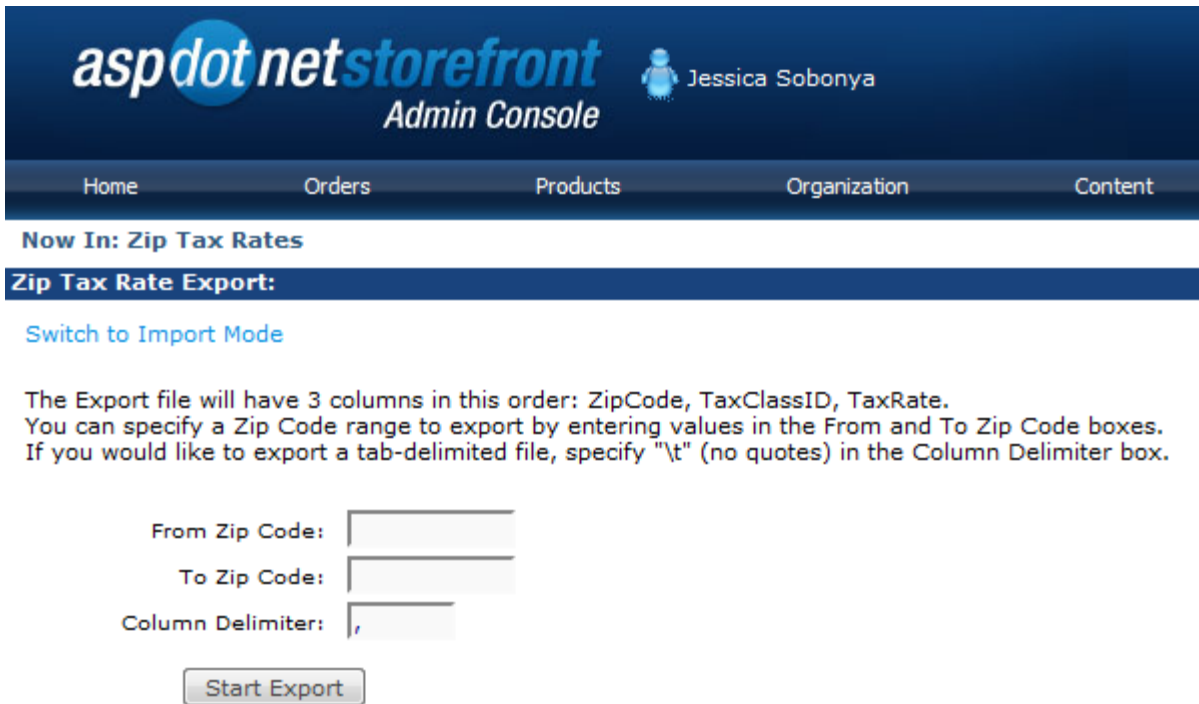
Column Delimiter – Enter a column delimiter for the file being used for the import.

Import For Country – Select the country that the zip codes and rates apply.

Click the Start Import button to import the zip tax rates into eRATEX.

## ZIP TAX RATE EXPORT

The Export screen allows a user to quickly export all zip code rates (or a specific zip code range) in the eRATEX Admin into a .txt file.



Fill in the following fields:

From Zip Code – Enter a zip code.

To Zip Code – Enter a zip code.

Column Delimiter – Enter a column delimiter for the export file.

Click the Start Export button to export the sales tax rates to a .txt file.

## ADVANCED

The Advanced section includes more complicated pages that should only be modified by advanced users.

### STUDENT AUTHENTICATION RULES

eRATEX provides a way to authenticate a student using SAML/Shibboleth when they perform certain actions on eRATEX, like adding a rental to their shopping cart, or selecting a certain shipping method or payment

method. The next few pages describe how to set up authentication rules for use with SAML/Shibboleth. **If you are interested in setting up SAML/Shibboleth in eRATEx, please contact RBS for assistance.**

Students can be prompted to authenticate by setting up authentication “rules”, as shown below:

**Now In: Student Authentication Rules**

**Configure Authentication Rules**

? **Enable Authentication Rules:**  No  Yes

? **Authentication Service:**

**Authentication Rules**

To setup authentication rules, select an Authentication Trigger:

**Authentication Rule (ID: 100)**

Enabled

**Conditions**

Action	Type	Mode	Values
<a href="#">Edit</a> <a href="#">Delete</a>	VR Product Type	Includes	TX
<a href="#">Edit</a> <a href="#">Delete</a>	Shipping Method ID	Includes	6
<a href="#">Edit</a> <a href="#">Delete</a>	Textbook Type	Does not include	EBook

To set up an authentication rule, fill in the following parameters:

**Enable Authentication Rules** – Select Yes to turn on authentication rules. You will be able to set up rules and conditions in the second half of the screen. If set to No, rules will not be enabled.

**Authentication Service** – Select the authentication service for rules setup. Currently, only SAML/Shibboleth is supported.

When finished, click Save Configuration.

If Authentication Enabled is set to Yes, authentication rules can be set up. To set up rules, an Authentication Trigger must be selected. The two Trigger options are:

Shipping Method Selection – The user will be prompted for authentication when they select a shipping method during checkout.

Rental Agreement Acceptance – The user will be prompted for authentication when they have a rental in their shopping cart, and agree to the rental agreement.

When a Trigger is selected, an Authentication Rule appears, with an “Enabled” checkbox, as shown below:

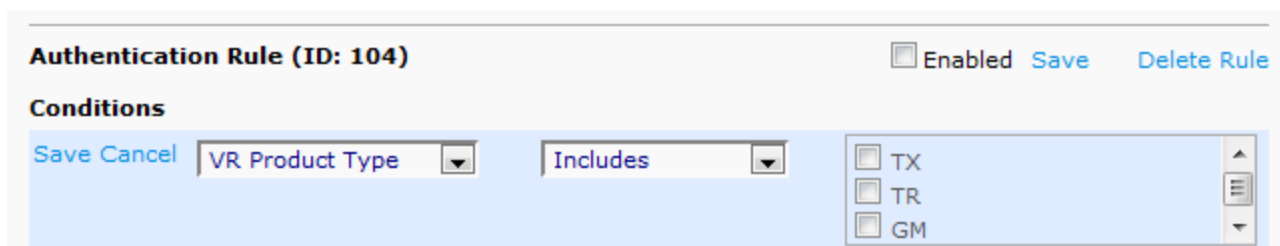


Click the Enabled checkbox to enable the Authentication Rule, and click Save to save the rule, or Delete Rule to delete the rule.

## CONDITIONS

Each Authentication Rule can have conditions. Conditions are optional, and do not have to be defined. Conditions can be set by VR Product Type (TX, TR, GM), Shipping Method ID, and/or Textbook Type (New and Used, Rental, eBook), and can be set to include or exclude options. For example, the Shipping Method Selection Trigger can have a condition to only prompt for authentication for in-store pickup orders, or orders that have rental textbooks.

Click Add Condition to set up conditions for the authentication rule, and click Save when finished defining the information, or Cancel to delete the condition, as shown below:



Below is an example of 3 conditions that have been set up for Shipping Method Selection:

**Authentication Rules**

To setup authentication rules, select an Authentication Trigger:

---

**Authentication Rule (ID: 100)**  Enabled [Save](#) [Delete Rule](#)

**Conditions**

Action	Type	Mode	Values
<a href="#">Edit</a> <a href="#">Delete</a>	VR Product Type	Includes	TX
<a href="#">Edit</a> <a href="#">Delete</a>	Shipping Method ID	Includes	6
<a href="#">Edit</a> <a href="#">Delete</a>	Textbook Type	Does not include	EBook

[Add Condition](#)

In this example, a student will be prompted for authentication when they select a shipping method, but only if they have a textbook in their shopping cart, their shipping method has an ID of 6, and the textbook is not an eBook.

When finished creating conditions, click the Save link to save the Authentication Rule with the Conditions.

## AUTHENTICATION SERVICES

Authentication Services is used to set up parameters for the authentication services that eRATEX supports. Currently, only SAML/Shibboleth is supported, but more services (like LDAP) may be added in the future. This section will describe the general configuration for SAML/Shibboleth. **If you are interested in setting up SAML/Shibboleth in eRATEX, [please contact RBS for assistance.](#)**

Click the Configure link next to SAML/Shibboleth to review and set the following parameters:

Configure SAML/Shibboleth Authentication Service
✖

?	<b>Popup Width:</b>	<input style="width: 95%;" type="text" value="600"/>	✎
?	<b>Popup Height:</b>	<input style="width: 95%;" type="text" value="500"/>	✎
?	<b>SAML Token Lifetime in Seconds:</b>	<input style="width: 95%;" type="text" value="180"/>	✎
?	<b>Preserve Token on Signin:</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes	✎
?	<b>SAML Time Skew in Seconds:</b>	<input style="width: 95%;" type="text" value="60"/>	✎
?	<b>Enable Authn Response Debugging:</b>	<input type="radio"/> No <input checked="" type="radio"/> Yes	✎

Save and Close
Cancel
Toggle Advanced

Popup Width – This sets the width (in pixels) of the authentication popup window.

Popup Height – This sets the height (in pixels) of the authentication popup window.

SAML Token Lifetime in Seconds – This sets how long the authentication token is valid. If null or zero, the user will be prompted to authenticate every time authentication is required. If a value is entered (ex. 300 seconds), when the user is authenticated, it will last for 300 seconds (5 minutes) before they are prompted to authenticate again when authentication is required.

Preserve Token on Signin – A user may be prompted to authenticate when they are not signed in to eRATEx. If they proceed to sign into their eRATEx account, the authentication token can be preserved, so they will not be prompted to authenticate again. Set this to Yes to preserve the authentication token, or No to not preserve the token.

SAML Time Skew in Seconds – This allows for a ‘time skew’ when checking certain conditions of the SAML response, and adjusts for differences between the eRATEx server and the IDP server. This should be set to a small timeframe (i.e. 10 seconds or less).

Enable Authn Response Debugging – Set to Yes to send any Authorization Response code as XML to the /images folder for debugging.

## STUDENT SCHEDULE FILE IMPORT

The Student Schedule File Import is used if the bookstore is using Booklist Personalization and has “Student Schedule Import” as their Booklist Personalization Type. [Click here](#) to go to the Booklist Personalization section to read more about this logic & setup.

## RE-SEND ORDERS TO VISUALRATEx

This page allows an order to be re-sent to VisualRATEx:

**Now In: Re-Send Orders to VR**

This feature can be used to re-send an order to VR. Enter the order number below and click Re-Send.

Order Number:

In the rare event that an order was created in eRATEX but never sent to VisualRATEX (and cannot be found in Order Fulfillment), the order number can be typed into the field and can be re-sent to VisualRATEX.

## INTEGRATION CONFIGURATION

eRATEX provides the ability to record and store logging information for the integration services between VisualRATEX, Verba, and SciQuest, as shown below:

**Now In: Integration Configuration**

Click “Configure” next to each option to enable logging, enter input and output log paths, and select which operations to log. Please contact RBS Support if you need assistance with this setup.

**TIP:** In the VR – Configure setup, there are parameters to automatically re-publish GM and TR products:



Configure VR Integration
✕

? **Re-publish GM Products:**
 No  Yes 📄

? **Re-publish TR Products:**
 No  Yes 📄

? **Use Single Rental Variant:**
 No  Yes 📄

Save and Close
Cancel
Toggle Advanced

By default, GM and TR products become unpublished in eRATEX when the “Available Online” flag is set to “N” for the product in VisualRATEX. If “Available Online” changes from “N” to “Y”, the product is not automatically re-published. Set the “Re-publish GM Products” and “Re-publish TR Products” parameters to “Yes” to automatically re-publish these products when the “Available Online” flag changes in VisualRATEX.

## MANAGE ERATEX LICENSES

Certain eRATEX features are “licensed”. An eRATEX user must acquire a license to use these features. To see which features a user can license, go the Manage eRATEX Licenses page:

Jessica Sobonya

Home
Orders
Products
Organization
Content
Users

**Now In: Manage eRATEX Licenses**

**Licensing Configuration:**

? **Check License in Test Mode:**
Default:  No  Yes 📄

**Reload License Data:**

**Licenses:**

Feature	Is Licensed	Start Date	Expiration Date
Basic One Page Checkout	Y		
Textbook Pre-Orders	Y		

The features that are available to license are listed under the “Features” column. A “Y” will appear in the “Is Licensed” column if that feature is licensed to the web site; start and expiration dates will populate for the duration of the licensing period.

If the bookstore has test web site, all licensed features are available to review and test free of charge. Make sure the “Check License in Test Mode” is set to “Yes” and click Submit to activate the features on your test web site.

The features that are currently available to license are: Textbook Pre-Orders and Basic One Page Checkout.

## **PLACING AN ORDER**

Once categories, products, shipping methods, sales tax, e-mail, and payment methods are set up, students can access the web site and place an order. This section describes how an order is placed on eRATEX.

## **SHOPPING CART**

---

As a student browses the site, he can add items to his shopping cart. Below is an example of a shopping cart, and some of the features of the shopping cart:

powered by **eratem**

Home | Categories | Textbooks | Customer Service | [View Wishlist](#) | [View Cart](#) | [1 Item\(s\)](#)

**Now In: Shopping Cart**

**Browse Categories**


- Featured Products
- Clothing
- Graduation and Gifts
- School Supplies
- Waps
- Stationery
- Tote Bags
- Technology and Computers
- General Books
- Gift Cards

**Shipping Information**

- Our Return Policy
- Your Privacy and Security
- Edit Your Address Book

[Continue Shopping...](#) [Checkout Now](#)

**Shopping Cart**

Product	Quantity	SubTotal
 RBS Hat - Embroidered Logo-All Sizes White SKU: 00090 Item Notes:	1 <a href="#">Delete</a>	\$14.99

[Update Cart](#)

**Order Options**

The Following Order Options Are Available:

	Cost	Select
<input checked="" type="checkbox"/> Gift Wrapping	\$10.00	<input type="checkbox"/>

[Update Cart](#)

Subtotal: \$14.99  
 Shipping: Calculated During Checkout  
 Tax: Calculated During Checkout

[Get Estimates](#)

**Coupon or Gift Card**

Enter any special offer/discount coupon code here:

[Update Cart](#)

**Order Notes**

Enter any special instructions or notes about this order:

[Update Cart](#)

[Continue Shopping...](#) [Checkout Now](#)

[About](#) | [Textbooks](#) | [Returns](#) | [FAQ](#) | [Contact Us](#) | [Wishlist](#) | [Site Map](#) | [Privacy Policy](#) | [Security](#) | [Mobile Version](#)

Powered by eRATEx™ RATEX Business Solutions  
 eRATEx  
 Customer Shopping Cart

Products in the shopping cart are displayed at the top of the page. The customer has the ability to increase the quantity of products they are ordering, or remove the product from their shopping cart. There are also options to enter a coupon or a gift card, order notes, and item notes. The student can continue shopping by clicking the Continue Shopping... button, or he can click Checkout Now to begin the checkout process.

## LOGGING IN / CREATING AN ACCOUNT

When the student clicks Checkout Now from the shopping cart, they must log in to begin the checkout process, as shown below:

1 SHOPPING CART ▶ 2 ADDRESS BOOK ▶ 3 SHIPPING OPTIONS ▶ 4 PAYMENT INFO ▶ 5 ORDER CONFIRMATION ▶ 6 ORDER COMPLETED

**Returning Customers:**

If you already have an account, please sign in using your E-Mail address and password below.

Email Address:

Password:

**Sign in & Checkout**

Forget your password?  
[click here](#)

**New Customers:**

**Register & Checkout**

Register Now For Additional Site Features:

- Remember your cart for next time
- Remember your order history
- Create your shipping/billing address book
- Setup a wish list
- Easily re-order again

*eRATEx*  
 Log-In screen

If the student has not created an account, they must click the Register & Checkout button. If they have previously created an account, they can enter their e-mail address and password to sign in and check out. The normal checkout process is described in the next few sections; basic one page checkout and anonymous checkout are also available.

## BASIC ONE PAGE CHECKOUT

Basic One Page Checkout functionality is available with eRATEx 4.1! This feature allows users to checkout on a single page, vs. having to enter their billing/shipping addresses, shipping selections, and payment on separate pages. Below is a screen shot of the one page checkout:

[Contact Us](#) | [My Account](#) | [Account Settings](#) | [Logout](#)

Home | Categories | Textbooks | Customer Service

[View Wishlist](#) | [View Cart](#) | [Basket](#)

**Now In Checkout -**

**Browse Categories**

- Featured Products
- Clothing
- Graduation and Gifts
- School Supplies
- Rugs
- Stationery
- Ultrabags
- Technology and Computers
- General Books
- Gift Cards

**Help & Info**

**RATEX Business Solutions, Inc.**  
 610 W. Germantown Pike  
 Suite 305  
 Plymouth Meeting, PA 19462

**Newsletter**

First Name:

Last Name:

Email Address:

**Billing Information**

Address: Billing Address

Name:

\*First Name:

\*Last Name:

\*Phone:

Country:

Address Type:

\*ADDRESS1:

Address2:

State:

\*City or #PO/#ZIP:

Country:

\*State/Province:

\*Zip:

**Shipping Information**

Address: Shipping Address

Name:

\*First Name:

\*Last Name:

\*Phone:

Country:

Address Type:

\*ADDRESS1:

Address2:

State:

\*City or #PO/#ZIP:

Country:

\*State/Province:

\*Zip:

**Select Shipping Method**

Shipping Methods:

- In Store Pickup (\$0.00)  
In-Store Pickup hours: 10a - 2p Monday through Thursday at the Customer Service desk
- FedEx - Ground (\$6.50)
- FedEx Ground - Home Delivery (\$6.50)
- FedEx - Express Saver (\$7.00)
- FedEx - 2 Day (\$20.00)
- FedEx - Standard Overnight (\$25.00)
- UPS Ground (\$6.95)
- UPS 2nd Day (\$18.99)
- UPS Next Day (\$25.00)

**Payment Select**

- Credit Card
- Bill Charge
- Student Card
- Department Charge

Click on the "Continue Checkout" button below to go to the CyberSource site and complete your purchase. After you finish making the payment, you will be returned back to this site. (TST 4/20/12)

**Order Summary**

Product	Quantity	Subtotal
RBS Rug - Conqueror-110 Size White SKU:00075	1	\$14.75

**Subtotal: \$14.75**  
**Tax: \$0.00**

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**eRATEX**

Basic One Page Checkout screen

[About](#) | [Textbooks](#) | [Returns](#) | [FAQ](#) | [Contact Us](#) | [Wishlist](#) | [Site Map](#) | [Privacy Policy](#) | [Security](#) | [Mobile Version](#)

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**NOTE:** Basic One Page Checkout is a licensed feature. If you are interested in acquiring a license, please contact RBS.

## **ANONYMOUS CHECKOUT**

---

Anonymous checkout allows a student to place an order without creating an account on eRATEX. To enable this functionality, set the following AppConfigs:

- PasswordIsOptionalDuringCheckout – Set this AppConfig to TRUE.
- AnonCheckoutReqEmail – Set this AppConfig to TRUE. This is necessary for customers using the CyberSource payment gateway, because CyberSource requires an e-mail address for settlements.

## **SHIPPING OPTIONS**

---

After logging in, if basic one page checkout or anonymous checkout are not being used, the student must select a shipping option from the list of shipping methods, as shown below:

- ▶ 1 SHOPPING CART
- ▶ 2 ADDRESS BOOK
- ▶ 3 SHIPPING OPTIONS
- ▶ 4 PAYMENT INFO
- ▶ 5 ORDER CONFIRMATION
- ▶ 6 ORDER COMPLETED

Shipping Address: 610 W Gemantown Pike Plymouth Meeting PA United States 19462 ▼

**Shipping Method:**

- In-Store Pickup \$0.00  
*In-Store Pickup hours: 10a - 3p Monday through Thursday at the Customer Service desk*
- FedEx - Ground \$6.50
- FedEx Ground - Home Delivery \$6.50
- FedEx - Express Saver \$5.00
- FedEx - 2 Day \$20.00
- FedEx - Standard Overnight \$25.00
- UPS Ground \$6.95
- UPS 2nd Day \$18.95
- UPS Next Day \$25.00

Select Shipping Method

**Order Summary** To edit your order, click here

Product	Quantity	SubTotal
RBS Hat - Embroidered Logo-All Sizes White SKU: 00060	1	\$14.99

Subtotal: \$14.99

eRATEX  
Shipping Options page

## PAYMENT INFORMATION

When a shipping method is selected, the student must click select Shipping Method to continue to the Payment Information page, as shown below:

powered by **eratem**

Contact Us | My Account | Jessica Sobonya Logout

Search:

Home | Categories | Textbooks | Customer Service | [View Wishlist](#) | [View Cart](#) | 1 Item(s)

Now In: Payment Information

**Browse Categories**

- Featured Products
- Clothing
- Graduation and Gifts
- School Supplies
- Mugs
- Stationary
- Tote Bags
- Technology and Computers
- General Books
- Gift Cards

Help & Info

RATEX Business Solutions, Inc.  
610 W. Germantown Pike  
Suite 305  
Plymouth Meeting, PA 19462

Newsletter

First Name

Last Name

1 SHOPPING CART | 2 ADDRESS BOOK | 3 SHIPPING OPTIONS | **4 PAYMENT INFO** | 5 ORDER CONFIRMATION | 6 ORDER COMPLETED

Credit Card

AR Charge

Student Card

Department Charge

Click on the "Continue Checkout" button below to go to the CyberSource site and complete your purchase. After you finish making the payment, you will be returned back to this site.  
(TEST MODE)

[Continue Checkout](#)

**Order Summary** [To edit your order, click here](#)

Product	Quantity	SubTotal
RBS Hat - Embroidered Logo-All Sizes White SKU: 00060	1	\$14.99
		Subtotal: \$14.99
		Shipping: (FedEx - Ground) \$6.50
		Tax: \$0.39
		<b>Total: \$21.88</b>

eRATEX  
Payment Information page

Here, the student will select a payment method from the list of options and click Continue Checkout. Depending on the payment method selected, the student will be redirected to a payment gateway to enter credit card information, or they will be prompted to enter an account number or student card number to complete the order.

## ORDER CONFIRMATION

When the appropriate payment details have been entered successfully, the student will be redirected to an Order Confirmation page, as shown below:





- ▶ 1 SHOPPING CART
- ▶ 2 ADDRESS BOOK
- ▶ 3 SHIPPING OPTIONS
- ▶ 4 PAYMENT INFO
- ▶ 5 ORDER CONFIRMATION
- ▶ 6 ORDER COMPLETED

### ORDER RECEIVED

Thank you for your order.

PLEASE PRINT THIS PAGE FOR YOUR RECORDS

Your Order Number is: 110615

Your Customer ID is: 101014

An e-mail confirmation will be sent to: jksobonya@ratex.com.

For a printable receipt, [click here](#)

*eRATEx*

*Order Confirmation page*

The student will be shown an order number and an e-mail receipt will be sent to them immediately. The student can view their order status in their Account page.

## TEXTBOOK PRE-ORDERS

Textbook pre-orders is available in eRATEx 4.1. Textbook pre-orders allows a student to select courses from a list or by manual entry, and check out through the normal checkout flow. All pre-orders are viewable in the eRATEx Admin and will be converted to internet orders when certain preferences are met. Each step in the pre-order process is described below, from the setup requirements to the pre-order conversion to internet orders.

**NOTE:** Textbook Pre-Orders is a licensed feature. If you are interested in acquiring a license, please contact RBS.

## TEXTBOOK PRE-ORDER CONFIGURATION

To use textbook pre-orders, certain parameters must be configured under the following menu option: eRATEx > Textbook Pre-Orders > Pre-Order Configuration:

**aspdotnetstorefront** Jessica Sobonya  
Admin Console

Home    Orders    Products    Organization

Now In: Pre-Order Configuration

? Pre-Order Term:

? Pre-Order Start Date:

? Pre-Order End Date:

? Pre-Order Product ID:

? Department Display Format:

? Course Display Format:

? Section Display Format:

Pre-Order Substitution Behavior:  Allow Customer Selection  
 Always Substitute  
 Never Substitute

? **Default Material Ranking:**

New:

Used:

Rental:

eBook:

? Send Receipt Email:  Yes  No

? Send Email On Pre-Order Update:  Yes  No

? Send Email On Course Update:  Yes  No

**Pre-Order Conversion Auto-Run:**

? Enabled:  Yes  No

? Auto-Run Start Date:

? Auto-Run End Date:

? Daily Auto-Run Time:  EASTERN TIME

? Convert Remaining Pre-Orders:  Yes  No

Next Scheduled Auto-Run: Not scheduled

[Save Settings](#)

Fill out each field:

Pre-Order Term – this is the term that the students will select their courses to build their pre-order. Select a term from the dropdown.

Pre-Order Start Date – the start date is the earliest day that a student can access the pre-order page and create a pre-order. If they try to access the pre-order page before this date, it will not be accessible.

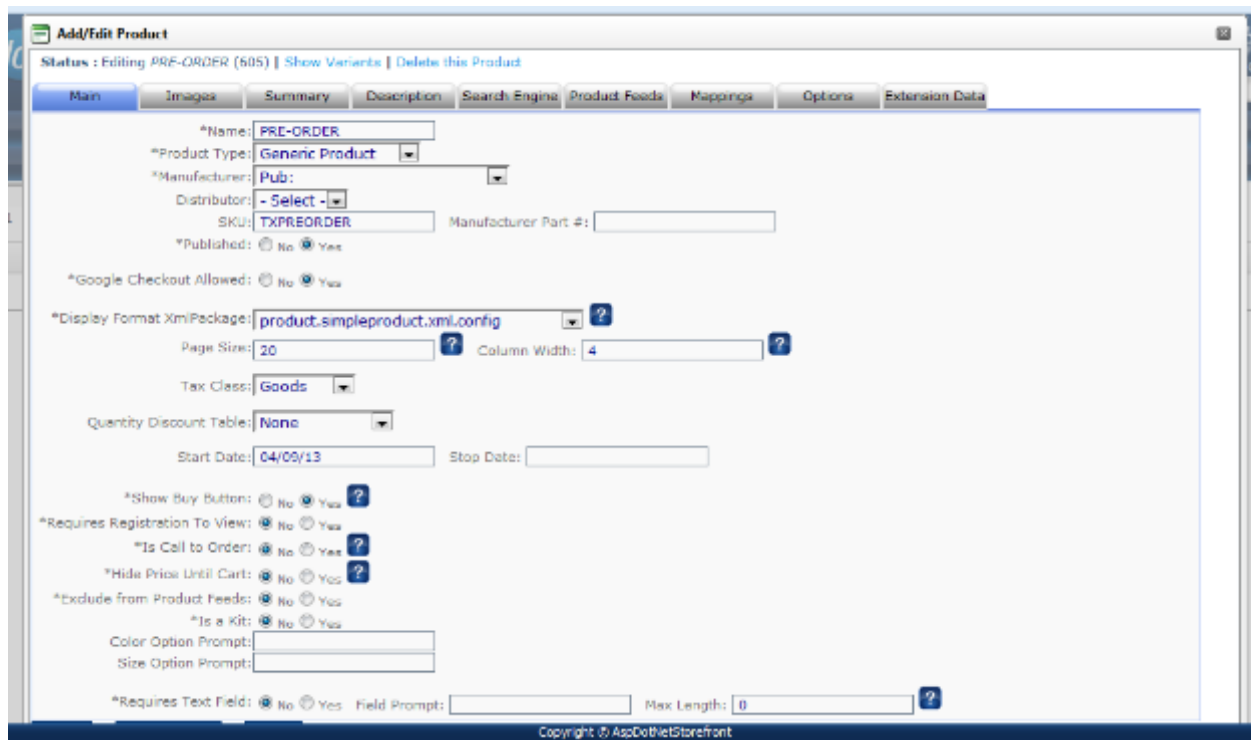
Pre-Order End Date – the end date is the last day that a student can access the pre-order page and create a pre-order. If they try to access the pre-order page after this date, it will not be accessible.

Pre-Order Product ID – **this product ID represents the “pre-order product” that will be added to the customer’s shopping cart so they can check out. The pre-order product is a single product that keeps track of the customer’s pre-order selections and preferences. The pre-order product must be created in the eRATEX Admin by an Administrator. To create the pre-order product, go to Products > Products Manager and select the green plus sign in the lower left corner of the screen. The pre-order product must have the following fields defined:**

- Name (ex. PRE-ORDER)
- Product Type (ex. Generic Product)
- SKU (ex. TXPREORDER)
- Price (ex. .01 – defined on the Variant)

An image can be added to the pre-order product in the Images tab.

Below is an example of a pre-order product:



eRATEX  
Pre-Order Product

The pre-order product ID at the top of the screen (605 in the above example) should be entered in the Pre-Order Product ID field.

Students have the option to manually enter a department, course, and section to place a pre-order. The following parameters are used to define a format/mask for the department, course, and section, to prevent a student from entering an incorrect pattern. Regular expressions are used to define the format. If you need help creating regular expressions, please contact RBS for assistance.

**Department Display Format** – Enter a department display format. Regular expressions are used to define the format. For example, `^[A-Z]{3}$` means a student enter a 3-character alpha department (ex. ENG or SCI).

**Course Display Format** – Enter a course display format. Regular expressions are used to define the format. For example, `^[0-9]{3}$` means a student enter a 3-character numeric course (ex. 100 or 200).

**Section Display Format** – Enter a section display format. Regular expressions are used to define the format. For example, `^[0-9]{3}$` means a student enter a 3-character numeric section (ex. 001 or 100).

**Pre-Order Substitution Behavior** – Select the appropriate substitution behavior for pre-orders. The selections are the same as the booklist configurations parameters:

- **Allow Customer Selection** – The student will be able to “rank” the textbook materials that they want to purchase.
- **Always Substitute** – The student will not be able to “rank” the textbook materials that they want to purchase; they will be able to select one option. The bookstore can substitute any textbooks while processing the order.
- **Never Substitute** – The student will not be able to “rank” the textbook materials that they want to purchase; they will be able to select one option. Substitution is not allowed while processing the order.

**Default Material Ranking** – If a student has never placed a pre-order before, and the pre-order substitution behavior is set to “Allow Customer Selection”, the materials can have a default ranking that the student can accept or change. The default ranking options can be listed here from 1-4, 1 being the preferred preference, 2 being the next preferred preference, 3 being the next preferred preference, and 4 being the last and final preference. Leave blank to have no default material ranking options.

**Send Receipt E-mail** – When a pre-order is placed, a pre-order receipt e-mail can be sent which summarizes the courses and preferences that were selected by the student. Select Yes to send a pre-order receipt e-mail. Yes is the recommended option.

**Send Email on Pre-Order Update** – When a pre-order is converted to an internet order, a pre-order update e-mail can be sent which summarizes the courses from the pre-order, the textbooks from each course, and

pricing of each textbook that have been ordered. The internet order number is also included in this e-mail. Select Yes to send a pre-order update e-mail. Yes is the recommended option.

Send Email on Course Update – After a pre-order is converted to an internet order, and another book is added to a course, an e-mail can be sent to the student telling them that the course on their pre-order has been updated with additional materials, with a link to purchase the textbook. Select Yes to send this e-mail. Yes is the recommended option.

### Pre-Order Conversion Auto Run

The Pre-Order Conversion Auto Run can automatically convert any “Ready to Convert” pre-orders to internet orders. The process can run once a day, every day, for the date range specified. If this process is not enabled, all pre-orders will need to be converted manually. This will be explained in more detail in the Pre-Order Queue section.

Enabled – Select “Yes” to turn on the Pre-Order Conversion Auto-Run logic.

Auto-Run Start Date – Enter a start date. This is the earliest day that “Ready to Convert” pre-orders can automatically convert to internet orders.

Auto-Run End Date – Enter an end date. This is the last day that “Ready to Convert” pre-orders can automatically convert to internet orders.

Daily Auto-Run Time – Select a time. This is the time each day that “Ready to Convert” pre-orders will automatically convert to internet orders.

Convert Remaining Pre-Orders – When the Pre-Order End Date is reached, any pre-orders that have not converted and are still in the queue can be converted. Set this to “Yes” to turn on this logic. Any pre-orders that cannot convert will be canceled.

Next Scheduled Auto-Run – If the auto-run logic is turned on, the next date/time that it is scheduled to run is displayed here.

When finished defining these parameters, click Save Settings.

## **PAGES, TOPICS, AND E-MAIL SETUP**

---

### **PAGES**

---

Several new pages were created for textbook pre-orders:

<http://www.yourwebsite.com/preordercourselist.aspx>

<http://www.yourwebsite.com/preorderoptions.aspx>

<http://www.yourwebsite.com/preordermerge.aspx>

<http://www.yourwebsite.com/preorderrentalagreement.aspx>

<http://www.yourwebsite.com/preorderconfirmation.aspx>

A student will access these pages to select courses and options for their pre-order, and will be explained in more detail in the next section, “Placing a Textbook Pre-Order”.

## TOPICS

---

Throughout the pre-order creation and checkout process, various prompts and text will display; this information is controlled by topics. Below is a list of each topic used throughout the pre-order process. They are listed in alphabetical order.

PreorderCheckoutPaymentWarning – this topic displays on the checkoutpayment.aspx page if a customer has a pre-order and another item in their shopping cart.

PreorderCheckoutShippingWarning – this topic displays on the checkoutshipping.aspx page if a customer has a pre-order and another item in their shopping cart.

PreorderCourseListEntryInfo – this topic displays on the preordercourselist.aspx page above the prompts to manually enter a department, course, and section.

PreorderCourseListInfo – this topic displays on the preordercourselist.aspx page above the Campus prompt.

PreorderCourseListSelectInfo – this topic displays on the preordercourselist.aspx page above the Department prompt.

PreorderEditWarning – this topic displays on the preordercourselist.aspx and preorderoptions.aspx pages at the top of the screen when a student is editing an active pre-order.

PreorderMaterialInfo – this topic displays on the preorderoptions.aspx page above the textbook materials options when substitution is not allowed.

PreorderMergeWarning – this topic displays on the preordermerge.aspx page when a customer creates a pre-order, logs in, and already has an active pre-order.

PreorderNotAvailable – this topic displays on the preordercourselist.aspx page if the student accesses the page before the Pre-Order Start Date.

PreorderNotFound – this topic displays when the customer tries to view their receipt and the pre-order cannot be found.

PreorderPersonalization – this topic displays at the very top of the preordercourselist.aspx page, above “Select Your Pre-Order Courses.”

PreorderRentalAgreement – this topic displays on the preorderrentalagreement.aspx page if a customer has selected “rental” as a ranking preference. The customer must agree to the pre-order rental agreement to continue checking out.

PreorderSubstitutionInfo – this topic displays on the preorderoptions.aspx page above the type and ranking options.

PreorderTypeInfo – this topic displays on the preorderoptions.aspx page above the textbook material options (Required Only or All).

## **E-MAIL**

---

Three e-mails are sent during the pre-order process:

**Pre-Order Receipt** – A receipt e-mail is sent to a customer when they have successfully placed a pre-order. The receipt summarizes the pre-order information. The XML package that builds the pre-order receipt e-mail is notification.preorderreceipt.xml.config. The XML package can be modified to change certain properties of the e-mail, like font size, graphics, and color.

**Pre-Order Update E-mail** – A pre-order update e-mail is sent to a customer when their pre-order has successfully converted to an internet order. The pre-order update e-mail summarizes the courses and textbooks that were converted onto the internet order. The XML package that builds the pre-order update e-mail is notification.preorderupdate.xml.config. The XML package can be modified to change certain properties of the e-mail, like font size, graphics, and color.

**Pre-Order Course Update E-mail** – A pre-order course update e-mail is sent to a customer when a course request in VisualRATEX is updated with additional materials and uploaded to eRATEX after a pre-order was converted to an internet order. The pre-order course update e-mail lists the pre-order number, course information, and new materials, with a link to purchase the new materials on eRATEX. The XML package that builds the pre-order update e-mail is notification.preordercourseupdate.xml.config. The XML package can be modified to change certain properties of the e-mail, like font size, graphics, and color.

Once this information is reviewed and updated, a student can place a textbook pre-order on eRATEX.

## **PLACING A TEXTBOOK PRE-ORDER**

---

Pre-orders can be placed any time between the Pre-Order Start Date and End Date by accessing the following link:

<http://www.yourwebsite.com/preordercourselist.aspx>

The following page will display:



### Select Your Pre-Order Courses

Select a Campus to get started

Campus:

**Selected Courses**

No courses selected

[Choose Pre-Order Options >>](#)

Select your department, course, and section from the lists below and it will be added to your Pre-Order.

Department:

Course:

Section:

If your course is not listed above, enter your department, course and section, and click "Add to Pre-Order".

Dept:  Course:  Section:

eRATEX  
Pre-Order Courselist Page

Here, a student can begin the pre-order process by selecting departments, courses, and sections from the lists, or they can manually enter departments, courses and sections at the bottom of the screen.






**IMPORTANT:**

RBS recommends uploading the **Course Enrollment file (TX.CEF)** to eRATEX for the pre-order term. The Course Enrollment file gives students the best selection when they look up their courses on the pre-order page. If the Course Enrollment file cannot be obtained, the Course Request file (TX.CRF) will be used to display courses on the pre-order page.

If your bookstore auto-populates course information for students on the booklist page, the same logic can be applied to the pre-order page.



As a student makes course selections, the courses display on the right-hand side of the screen:

Selected Courses	
<b>SUMMER 2013</b>	
	BIOBM - 200 Section 1
	COML - 200 Section 2
	MED - 200 Section 1
	REL - 100 Section 1
	WRIT - 100 Section 3
<a href="#">Choose Pre-Order Options &gt;&gt;</a>	

When finished making selections, the student will click “Choose Pre-Order Options” to advance to the next page to select their pre-order options:

## Select Your Pre-Order Options

### Selected Courses

BIOBM - 200 Section 1  
 COML - 200 Section 2  
 MED - 200 Section 1  
 REL - 100 Section 1  
 WRIT - 100 Section 3

### Select the type of materials you want to Pre-Order:

- Required Only
- ALL (Required and Optional/Recommended)

### Rank the order of textbook materials you want:

(If you don't want an item, leave the Rank field blank)

Type	Rank
New	<input type="text"/>
Used	<input type="text"/>
Rental	1
eBook	<input type="text"/>

[Return to Course Selection](#) [Save and Continue](#)

*eRATEX  
 Pre-Order Options Page with "Allow Customer Selection" Substitution Preference*

Here, the student can select if they want required books only, or all books (required and optional/recommended). If the pre-order substitution behavior is set to "Always Substitute" or "Never Substitute", the student will be shown the textbook materials (new, used, rental, and eBook) and must select one material, as shown below:

## Select Your Pre-Order Options

### Selected Courses

BIOBM - 200 Section 1  
 COML - 200 Section 2  
 MED - 200 Section 1  
 REL - 100 Section 1  
 WRIT - 100 Section 3

### Select the type of materials you want to pre-order:

- Required Only
- ALL (Required and Optional/Recommended)

### Select the textbook materials you want:

- New
- Used
- Rental
- eBook

[Return to Course Selection](#)

[Save and Continue](#)

eRATEx

Pre-Order Options Page with “Always Substitute” Substitution Preference

If the pre-order substitution behavior is set to “Allow Customer Selection”, the student can rank the textbook materials that they want (see image on previous page). At least one ranking must be selected to continue placing the pre-order. Textbooks can be ranked from 1 to 4, 1 being the preferred preference, 2 being the next preferred preference, 3 being the next preferred preference, and 4 being the last and final preference. A student does not have to rank all 4; they can rank any combination of 1-4. In the above example, the student entered a “1” next to the “Rental” field, and no other options were ranked. This means that the student only wants rental textbooks. If a student entered a “1” next to the “Used” field and a “2” next to the “New” field, this means that they want used, but if used is not available, they will get new. Ranking is very important during the pre-order conversion process and will be discussed in more detail in the Pre-Order Queue section.

When the student clicks Save and Continue, the Pre-Order will be added to the shopping cart:

eRATEx

Shopping Cart with Pre-Order

When the pre-order is added to the shopping cart, the “Pre-Order Product” is displayed to the student, with all of their courses, preferences, and ranking options. At this point, the student can begin the checkout process. The student must create an account/login to continue checking out. The student must select a shipping option on the Shipping page. All shipping options are shown to the student, but prices are NOT calculated, since this is a pre-order and eRATEx does not yet know how many textbooks are going to be on the final order.

▶ 1 SHOPPING CART ▶ 2 ADDRESS BOOK ▶ **3 SHIPPING OPTIONS** ▶ 4 PAYMENT INFO ▶ 5 ORDER CONFIRMATION ▶ 6 ORDER COMPLETED

**Select Shipping Address:** 2250 Hickory Road Plymouth Meeting PA United States 19462 ▼

**Please select the desired shipping method below:**

- FED Ex - Ground
- FedEx - 2 Day
- FedEx Ground - Home Delivery
- FedEx - Express Saver
- FedEx - Standard Overnight
- UPS GROUND
- UPS - 2 Day
- UPS - 3 Day
- USPS - Standard
- In Store Pickup
- West Campus Pickup

eRATEX  
Shipping Page

Once a shipping address is selected, the pre-order rental agreement is shown to the student if rentals was selected as a ranking option. The student must agree to the pre-order rental agreement to continue checkout:

Pre-Order Rental Agreement for SUMMER 2013

---

**Pre-Order Rental Agreement**

You have selected Rental as a preferred material for your Pre-Order. If your Pre-Order is completed using a rental book, you agree to return it by the end of the Rental Period. A complete rental agreement, including the specific Rental Return Date, will be provided when your order is processed.

Accept Agreement

eRATEX  
Pre-Order Rental Agreement Page

When the student accepts the rental agreement and continues checkout, they must select a payment type to complete the checkout process:

1 SHOPPING CART    2 ADDRESS BOOK    3 SHIPPING OPTIONS    **4 PAYMENT INFO**    5 ORDER CONFIRMATION    6 ORDER COMPLETED

Credit Card         

AR Charge  
 Student Card  
 Department Charge

Click on the "Continue Checkout" button below to go to the CyberSource site and complete your purchase. After you finish making the payment, you will be returned back to this site. (TEST MODE)

[Continue Checkout](#)

**Order Summary**    [To edit your order, click here](#)

Product	Quantity	SubTotal
<b>PRE-ORDER</b> BIOBM - 200 Section 1 COML - 200 Section 2 MED - 200 Section 1 REL - 100 Section 1 WRIT - 100 Section 3 Required Materials Only Preferred Materials: Rental SKU: TXPREORDER	1	\$0.01

Sub Total: \$0.01  
 Shipping: (FED Ex - Ground) TBD  
 Tax: \$0.00  
**Total: \$0.01**

*eRATEX  
Payment Page*

The total amount of the pre-order is the amount of the pre-order product (.01 in the above example). Shipping displays as "TBD" ("To Be Determined") because shipping amounts are not yet known. If using a credit card, the customer is sent to the applicable payment gateway (i.e. CyberSource) to enter their credit card information. The credit card will be used when the pre-order is converted to an internet order and the sales order is processed through Order Fulfillment. If another payment type is used, it is stored with the pre-order and used when the pre-order is converted to an internet order and the sales order is processed through Order Fulfillment. If a student enters a gift card during checkout, they will be prompted to enter another form of payment to complete the pre-order.

When the applicable payment information has been entered, the textbook pre-order has been successfully placed, and the student will receive a pre-order number and a pre-order receipt e-mail summarizing their pre-order information:



## Thank you for your Textbook Pre-Order.

Your Pre-Order Number is: 10027

An e-mail confirmation will be sent to: [jksobonya@ratex.com](mailto:jksobonya@ratex.com).

For a printable receipt, [click here](#)

eRATEx

Pre-Order Confirmation Page

### RATEx University Pre-Order Receipt

\*\*\* PLEASE PRINT RECEIPT OUT AND RETAIN IT FOR FUTURE REFERENCE \*\*\*

Pre-Order Number 10027  
 Customer ID 100885  
 Pre-Order Date 4/26/2013 1:57:13 PM

Bill To:  
 Jessica Sobonya  
 2250 Hickory Road  
 Suite 10  
 Plymouth Meeting, PA 19462  
 United States  
 1-610-828-8630  
[jksobonya@ratex.com](mailto:jksobonya@ratex.com)

Ship To:  
 Jessica Sobonya  
 2250 Hickory Road  
 Suite 10  
 Plymouth Meeting, PA 19462  
 United States  
 1-610-828-8630

Pre-Order Date:	4/26/2013 1:57:13 PM	Payment Method:	Credit Card
Shipping:	FED Ex - Ground		

#### Selected Courses

- BIOBM - 200 Section 1
- COML - 200 Section 2
- MED - 200 Section 1
- REL - 100 Section 1
- WRIT - 100 Section 3

#### Selected Options

- Required Materials Only
- Preferred Materials: Rental

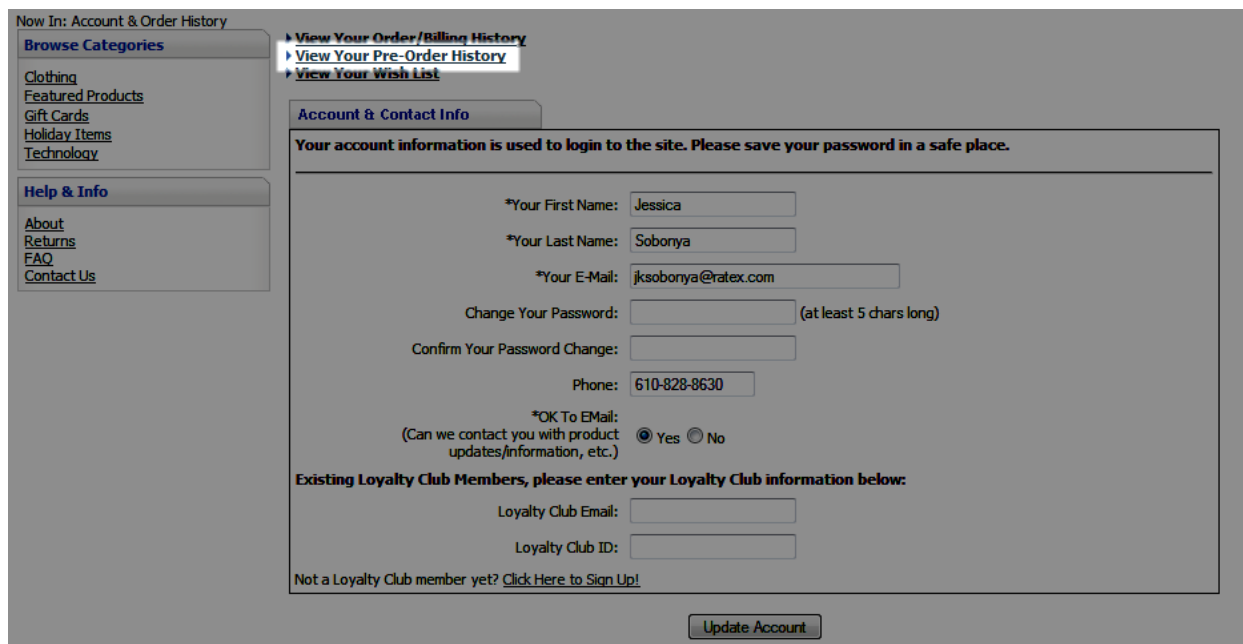
#### Pre-Order Rental Agreement

You have selected Rental as a preferred material for your Pre-Order. If your Pre-Order is completed using a rental book, you agree to return it by the end of the Rental Period. A complete rental agreement, including the specific Rental Return Date, will be provided when your order is processed.

[View or Edit this Textbook Pre-Order](#)

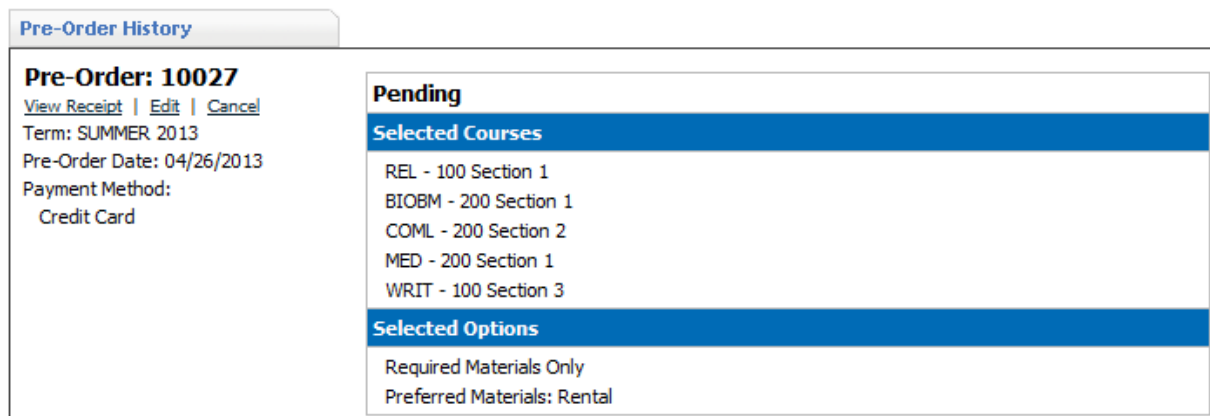
eRATEx  
 Pre-Order Receipt E-mail

In the pre-order receipt e-mail, there is a link for the student to view or edit their pre-order. A student can edit their pre-order at any time by going to their “My Account” page. There is a link called “View Your Pre-Order History” where the student can see their pre-order, view their receipt, and make changes or cancel their pre-order:



eRATEx

My Account Page with Pre-Order History Link



eRATEx

Pre-Order History section of My Account Page

If the student wants to edit their pre-order, they will be taken back to the Pre-Order Course List page which will display a message saying that they are editing their active pre-order:

YOURCOMPANY.com Samantha Jones Logout

[Your Wishlist \(0\)](#) | 
 [Shopping Cart \(0\)](#) | 
 [Contact Us](#) | 
 [Your Account](#)

[Home](#) | 
 [Categories](#) | 
 [Textbooks](#) | 
 [Customer Service](#)

Search:  
[Track Your Order](#) | 
 [Returns](#) | 
 [Shipping Policy](#) | 
 [FAQ](#)

**Editing Pre-Order: 10031**

**Please Note:** Since you have already placed a Textbook Pre-Order, you are currently editing the active pre-order. You can only have one active pre-order at a time. If you wish to cancel this pre-order and start a new one, you can manage your pre-orders in your [Account page](#).

**Select Your Pre-Order Courses**

Select a Campus to get started

Campus:

---

Select your department, course, and section from the lists below and it will be added to your Pre-Order.

Department:  
  
 BIOAP - BIO - ANIMAL PHYSIOLOGY & ANATOMY  
 BIOBM - BIO - BIOCHEMISTRY MOLECULAR & CELL  
 BIOG - BIOLOGY - GENERAL  
 BIOGD - BIO - GENETICS & DEVELOPMENT

**Selected Courses**

**SUMMER 2013**

✗

ART - 100  
Section 1

---

✗

WRIT - 100  
Section 1

[Cancel Changes](#)    [Save and Continue](#)

eRATES  
Editing an Active Pre-Order

The student can cancel their pre-order at any time by clicking the “Cancel” link in the Pre-Order History section.

## MERGING PRE-ORDERS

Students can only have one active pre-order at a time. It is possible for a student to submit a pre-order, forget that they submitted a pre-order, and create a new pre-order when logged out. When they log in to check out, a pre-order merge page will display:



## Pre-Order Merge

You already have an active Textbook Pre-Order. Since you can only have one active pre-order, the courses and options you selected have been merged with the existing pre-order. Please review the adjusted details below. If you want to cancel the existing pre-order, you can do so on your [Account page](#).

### Existing Pre-Order: 10031

#### Selected Courses

ART - 100 Section 1  
 BIOAP - 100 Section 1  
 BIOBM - 100 Section 1  
 BIOG - 100 Section 1  
 COML - 100 Section 1  
 HIST - 100 Section 1  
 SCI - 100 Section 1  
 WRIT - 100 Section 1

#### Selected Options

Required Materials Only  
 Preferred Materials: New, eBook

### Merged Pre-Order

#### Selected Courses

ART - 100 Section 1  
 BIOAP - 100 Section 1  
 BIOBM - 100 Section 1  
 BIOG - 100 Section 1  
**CHEM - 100 Section 1**  
 COML - 100 Section 1  
 HIST - 100 Section 1  
 SCI - 100 Section 1  
 WRIT - 100 Section 1

#### Selected Options

**Required and Optional/Recommended Materials**  
**Preferred Materials: Used**



eRATES

Pre-Order Merge Page

The student will see their original pre-order, and what their merged pre-order will look like, with any new courses and material options highlighted in red. The student can cancel the pre-order merge, or save their merged pre-order.

## **PLACING A TEXTBOOK PRE-ORDER WITH OTHER ITEMS**

A student can place a textbook pre-order with other items in the shopping cart. The other items in the shopping cart will be processed separately from the pre-order. During checkout, the student will be shown shipping methods with pricing for the non-pre-order items in the shopping cart. A warning message will display stating that the shipping method selected will be used for the pre-order and non-pre-order items.

**Please Note:** You currently have a Textbook Pre-Order in your cart, so the Shipping Method you select here will also be used when the Pre-Order is processed. If you want to use a different Shipping Method for your Pre-Order, please place it separately.

**Select Shipping Address:** 2250 Hickory Road Plymouth Meeting PA United States 19462

**Please select the desired shipping method below:**

- In Store Pickup \$0.00
- West Campus Pickup \$1.50
- Express Mail \$14.10
- Priority Mail \$5.60
- Standard Post \$5.60
- Library Mail \$2.40
- Media Mail \$2.53

Select Shipping Method

**Order Summary**

[To edit your order, click here](#)

Product	Quantity	SubTotal
<b>RBS WOMEN'S T-SHIRT-Small</b> SKU: 00070	1	\$19.99
<b>PRE-ORDER</b> BIOG - 100 Section 1 BIOGD - 100 Section 1 REL - 100 Section 1 Required Materials Only Preferred Materials: Rental, eBook SKU: TXPREORDER	1	\$0.01

Sub Total: \$20.00

eRATEX  
Shipping Page

Similarly, when a student selects a payment method, a warning message will display stating that the payment method selected will be used for the pre-order and non-pre-order items.

**Please Note:** You currently have a Textbook Pre-Order in your cart, so the Payment Method you select here will also be used when the Pre-Order is processed. If you want to use a different Payment Method for your Pre-Order, please place it separately.

Are you a current faculty, staff or student?  Yes  No

Credit Card



AR Charge

Student Card

Department Charge

Click on the "Continue Checkout" button below to go to the CyberSource site and complete your purchase. After you finish making the payment, you will be returned back to this site. (TEST MODE)

[Continue Checkout](#)

**Order Summary**

To edit your order, [click here](#)

Product	Quantity	SubTotal
<b><u>RBS WOMEN'S T-SHIRT-Small</u></b> SKU: 00070	1	\$19.99
<b><u>PRE-ORDER</u></b> BIOG - 100 Section 1 BIOGD - 100 Section 1 REL - 100 Section 1 Required Materials Only Preferred Materials: Rental, eBook SKU: TXPREORDER	1	\$0.01

Sub Total: \$20.00  
 Shipping: (Express Mail) \$14.10  
 Tax: \$2.05  
**Total: \$36.15**

*eRATEX*  
*Payment Information Page*

When the payment information is entered, the student will receive a confirmation page for both the pre-order and the internet order that was created for the non-pre-order items.

▶ 1 SHOPPING CART ▶ 2 ADDRESS BOOK ▶ 3 SHIPPING OPTIONS ▶ 4 PAYMENT INFO ▶ 5 ORDER CONFIRMATION ▶ 6 ORDER COMPLETED

## ORDER RECEIVED

**Thank you for your order.**

**PLEASE PRINT THIS PAGE FOR YOUR RECORDS**

Your Order Number is: 800175

Your Customer ID is: 100885

An e-mail confirmation will be sent to: [jksobonya@ratex.com](mailto:jksobonya@ratex.com).

For a printable receipt, [click here](#)

**Thank you for your Textbook Pre-Order.**

Your Pre-Order Number is: 10032

An e-mail confirmation will be sent to: [jksobonya@ratex.com](mailto:jksobonya@ratex.com).

For a printable receipt, [click here](#)

*eRATEX*

*Order Confirmation Page*

## PRE-ORDER QUEUE

As pre-orders are placed, they are logged in the eRATEX Admin in the Pre-Order Queue, located under eRATEX > Textbook Pre-Orders > Pre-Order Queue:

Jessica Sobonya
RATEX University
Reset Cache
Logout

[Home](#)
[Orders](#)
[Products](#)
[Organization](#)
[Content](#)
[Users](#)
[Configuration](#)
[Help](#)
[eRATEX](#)

Now In: Pre-Order Queue Home

**Pre-Order Queue Summary Stats** [Refresh](#)

Ready To Convert: 2  
 Pending: 3  
 Closed: 0  
 Canceled: 1

Pre-Order Search:   (Search by Pre-Order Number, Customer Last Name, Email, or Dept-Course-Section)

**Pre-Orders: Pending**

Convert	Order Action	Pre-Order Number	Pre-Order Date	Customer	Ship To	Courses	Customer Preference	Req. Opt
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Cancel</a>	10020	03/05/2014 11:42:34 AM	Hannah Stevens hstevens@ratex.edu	In-Store Pickup	BIOAP-100-1 BIOPL-100-1 CHEM-100-1 NS-100-1 - Preference Not Available	Used	ALL
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Cancel</a>	10021	03/05/2014 11:46:34 AM	Bill Stanley bstanley@ratex.edu	Bill Stanley 610 W Germantown Pike Plymouth Meeting, PA 19462 United States 1610520630 FedEx - Ground	MKT-200-3 PNT-200-3 - No Required Materials SPE-200-3 TREA-300-3 - Preference Not Available	New Rental Used Rental	ALL
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Cancel</a>	10022	03/08/2014 10:25:35 AM	Nike Pflugfelder nysadmin@ratex.com	In-Store Pickup	ART-100-1 - Preference Not Available	New Used New Rental Used Rental eBook	ALL

**Conversion Options**

Cancel any courses that cannot be converted

Convert the Pre-Orders selected above

Convert ALL Pre-Orders with status "Pending"

*eRATEX  
Textbook Pre-Order Queue*

Pre-orders can be in one of four queues:

- Ready to Convert
- Pending
- Closed
- Canceled

Each queue is described below.

Ready to Convert – Pre-orders are “ready to convert” if every course the student chose for their pre-order has a course request uploaded to eRATEX AND every book on the course meets the student’s ranking/preference choices AND adequate inventory is available. (Inventory is reviewed if the booklist configuration inventory handling is set to “honor inventory.” Inventory is ignored if the booklist configuration inventory handling is set to “ignore inventory.”)

**Pre-Orders: Ready To Convert**

Convert	Order Action	Pre-Order Number	Pre-Order Date	Customer Email	Ship To	Courses	Customer Preference	Req Opt
<input type="checkbox"/>	Edit Cancel	10007	04/11/2013 11:31:28 AM	test101430@example.com	In Store Pickup	BIOGD-100-1 HIST-100-1 MED-200-1	New Rental	Req

- Convert the Pre-Orders selected above
- Convert ALL Pre-Orders with status "Ready To Convert"

*eRATES*  
*Ready to Convert Queue*

Pending – Pre-orders are “pending” if one or more courses that the student chose for their pre-order have not been uploaded to eRATES, does not meet the student’s ranking/preferences choices, or if inventory is unavailable.

**Pre-Orders: Pending**

Convert	Order Action	Pre-Order Number	Pre-Order Date	Customer Email	Ship To	Courses	Customer Preference	Req Opt
<input type="checkbox"/>	Edit Cancel	10006	04/11/2013 11:31:28 AM	test101429@example.com	In Store Pickup	BIOBM-200-1 - No Adoption Received ENG-100-2 HIST-200-3 NUT-100-2 SCI-200-1	New	ALL
<input type="checkbox"/>	Edit Cancel	10012	04/11/2013 12:04:44 PM	test101435@ratex.edu	In Store Pickup	CHEM-100-3 - Preference Not Available	eBook	Req
<input type="checkbox"/>	Edit Cancel	10026	04/24/2013 12:58:30 PM	aangel@ratex.edu	Ana Angel 2250 Hickory Road PLYMOUTH MEETING, PA 19462 United States 1-610-592-4176	NUT-100-1 SCI-100-1 WRI-100-1 - No Adoption Received	Used New	ALL
<input type="checkbox"/>	Edit Cancel	10027	04/26/2013 01:57:13 PM	jksobonya@ratex.com	Jessica Sobonya 2250 Hickory Road Suite 10 Plymouth Meeting, PA 19462 United States 1-610-828-8630	BIOBM-200-1 - No Adoption Received COML-200-2 - No Adoption Received MED-200-1 REL-100-1 - No Adoption Received WRIT-100-3 - Preference Not Available	Rental	Req

- Convert the Pre-Orders selected above
- Convert ALL Pre-Orders with status "Pending" PLEASE NOTE: Any Pre-Orders that cannot be converted will be canceled

*eRATES*  
*Pending Queue*

A color-coded system is in place to determine why a pre-order is in the “Pending” queue:

**Green** – A course request has been uploaded to eRATES, every book on the course meets the customer preference/ranking, and inventory is available.

**Yellow (Preference Not Available)** – A course request has been uploaded to eRATES, but at least one book on the course does not meet the customer’s preference/ranking, or inventory is not available. To see details about which textbook(s) do not meet the customer’s preference/ranking/inventory, click the “Preference Not Available” text next to the course. The course and textbooks will display in a pop-up window, as shown below:

Pre-Order Course Details

NS-100-1 - Preference Not Available

9780073256528 - Product is available

9780538734943 - Product is available

9781133936534 - Product is available

9780077224851 - Product is available

9780073515472 - Product has no in-stock, published variants that satisfy the customer's preferences

**Red (No Adoption Received)** – A course request has not been uploaded to eRATEX.

When all courses are green, the pre-order moves from the Pending queue to the Ready to Convert queue.

**Closed** – Pre-orders are “closed” when they successfully convert to internet orders. Once a pre-order is closed, it can no longer be edited in the eRATEX Admin or by the student. The first column states the internet order number that the pre-order converted to, as well as the date and time the conversion occurred.

**Pre-Orders: Closed**

Converted to Order 800150 on 04/18/2013 03:55:08 PM	10005	04/11/2013 11:31:28 AM	test101428@example.com	In Store Pickup	ART-100-1 BIOAP-300-2 BIOAP-300-4 BIOAP-300-5 BIOG-100-1 NUT-200-1	Used	Req
Converted to Order 800159 on 04/22/2013 01:49:09 PM	10008	04/11/2013 11:31:28 AM	test101431@example.com	In Store Pickup	BIOAP-200-2 BIOAP-300-2 BIOGD-100-2 CHEM-100-1 GD-200-1 MED-100-1 - Canceled NUT-200-1 WRIT-100-3	New Rental eBook Used	ALL
Converted to Order 800160 on 04/22/2013 02:34:07 PM	10009	04/11/2013 11:31:28 AM	test101432@example.com	In Store Pickup	BIOAP-100-2 BIOAP-300-3 BIOGD-300-1 WRIT-100-2	eBook Used Rental New	ALL
Converted to Order 800162 on 04/24/2013	10010	04/11/2013 12:03:38 PM	test101433@ratex.edu	In Store Pickup	BIOAP-300-5 BIOG-100-2 HIST-300-1	New	Req

*eRATEX  
Closed Queue*

**Canceled** – Pre-orders are canceled when a student decides to cancel their pre-order, an administrator cancels a pre-order in the pre-order queue by clicking the “Cancel” link, or if a pre-order “converts” with no courses and/or preferences met. The first column states the date and time the cancellation occurred.

**Pre-Orders: Canceled**

Status	Pre-Order Number	Pre-Order Date	Customer Email	Ship To	Courses	Customer Preference	Req Opt
Canceled on 04/10/2013 10:21:17 AM	10001	04/10/2013 10:09:21 AM	aconley@ratex.com	In Store Pickup	CHEM-100-2 ENG-100-1-5	Used New	ALL
Canceled on 04/18/2013 12:33:56 PM	10002	04/10/2013 08:22:14 AM	aconley@ratex.com	In Store Pickup	No Courses Selected	New Used	Req

eRATEX  
Canceled Queue

## EDITING PRE-ORDERS

An eRATEX Administrator can edit a pending or ready to convert pre-order at any time. To edit a pre-order, click the “Edit” button in the Order Action column:

**Pre-Orders: Pending**

Convert	Order Action	Pre-Order Number	Pre-Order Date	Customer Email	Ship To	Courses	Customer Preference	Req Opt
<input type="checkbox"/>	Edit Cancel	10026	04/24/2013 12:58:30 PM	aangel@ratex.edu	Ana Angel 2250 Hickory Road PLYMOUTH MEETING, PA 19462 United States 1-610-592-4176	NUT-100-1 SCI-100-1 WRI-100-1 - No Adoption Received	Used New	ALL
<input type="checkbox"/>	Edit Cancel	10027	04/26/2013 01:57:13 PM	jksobonya@ratex.com	Jessica Sobonya 2250 Hickory Road Suite 10 Plymouth Meeting, PA 19462 United States 1-610-828-8630	BIOBM-200-1 - No Adoption Received COML-200-2 - No Adoption Received MED-200-1 REL-100-1 - No Adoption Received WRIT-100-3 - Preference Not Available	Rental	Req

A window will display the pre-order information, including the courses that were selected for the pre-order, options to add a course, change the required/optional preference, and the ranking order:



**Edit Pre-Order 10027**

**Select Courses to Remove:**

- BIOBM-200-1 - No Adoption Received
- COML-200-2 - No Adoption Received
- MED-200-1
- REL-100-1 - No Adoption Received
- WRIT-100-3 - Preference Not Available

**Add a Course:**

Campus:  Dept:  Course:  Section:

**Required/Optional:**

Required Only  
 ALL (Required and Optional/Recommended)

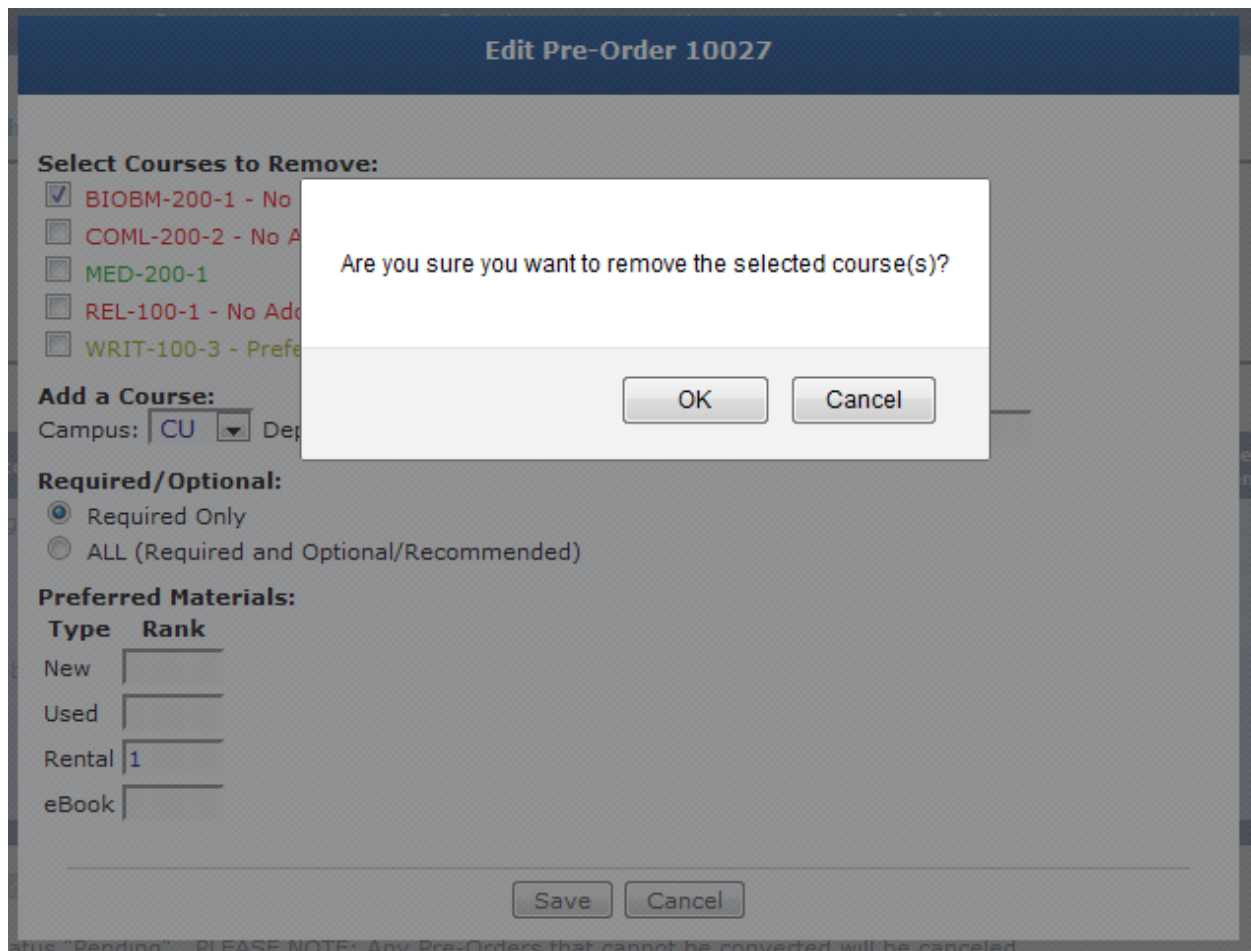
**Preferred Materials:**

Type	Rank
New	<input type="text"/>
Used	<input type="text"/>
Rental	<input type="text" value="1"/>
eBook	<input type="text"/>

status "Pending" PLEASE NOTE: Any Pre-Orders that cannot be converted will be canceled

eRATEx  
Editing a Pre-Order

To remove a course from a pre-order, check the box next to the course and click the Save button. The following prompt will display:



Select OK to remove the course from the pre-order or Cancel to go back to the Edit screen.

## CONVERTING PRE-ORDERS TO INTERNET ORDERS

Ready to convert pre-orders can be converted to internet orders at any time by placing a check in the checkbox next to the pre-order and clicking the “Convert Selected” button. Alternately, clicking the “Convert ALL” button will convert every pre-order that is ready to convert. If the auto-run logic is turned on, every pre-order that is ready to convert will be converted to internet orders when the process runs at the specified time.

Pre-orders in the Pending queue can also be converted to internet orders by placing a check in the checkbox next to the pre-order and selecting “Convert Selected.” “Convert ALL” is also an option. The pending pre-order queue allows partially complete pending orders to remain open after converting the available course materials to an internet order. This allows one pre-order to keep track of and process multiple internet orders, depending on the availability of the courses and textbooks at the time of the pre-order conversion. By default, a pending pre-order will remain open if course(s) on the pending pre-order cannot convert, but a selecting a checkbox in the “Conversion Options” area can cancel any courses that cannot be converted:

**Pre-Orders: Pending**

Convert	Order Action	Pre-Order Number	Pre-Order Date	Customer	Ship To	Courses	Customer Preference	Req Opt
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Close</a> <a href="#">Re-send Email</a>	10043	11/08/2013 08:49:41 AM	Jessica Sobonya jksobonya@ratex.com	Jessica Sobonya 610 W Germantown Pike Suite 305 Plymouth Meeting, PA 19462 United States 1-610-828-8630 FedEx - Standard Overnight	<b>BIO-500-1 - No Adoption Received</b> ART-100-1 - Converted to order 800214 ENG-100-1 - Converted to order 800214 SCI-100-1 - Converted to order 800214 WRIT-100-1 - Converted to order 800214 BIOAP-100-1 - Converted to order 800213	Used Rental New Rental New	ALL
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Cancel</a>	10044	11/08/2013 11:41:18 AM	Samantha Jones sjones@ratex.edu	Sarah Jones 610 W Germantown Pike Plymouth Meeting, PA 19462 United States 1-610-828-8630 FED Ex - Ground	<b>BIOAP-200-2</b> <b>BIOBM-200-1 - No Adoption Received</b> <b>BIOG-200-2</b> <b>BIOGD-300-3</b>	Used New Used Rental New Rental	Req

**Conversion Options**

Cancel any courses that cannot be converted

Convert the Pre-Orders selected above

Convert ALL Pre-Orders with status "Pending"

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Once materials on a pending pre-order have been converted to at least one internet order, new Order Action options are available:

Close – A Close link has been added if a user wishes to close the pre-order; this action cancels any courses that have not been converted.

Re-Send E-mail – A Re-Send E-mail link has been added to re-send the Pre-Order Update e-mail to the student.

A student cannot edit or cancel any courses that have already been converted on a pending pre-order.

For partially complete pending pre-orders, the Pre-Order History and Pre-Order Update E-mails display which courses converted on which internet orders, which courses are still pending, and which courses were canceled.

When a pre-order converts to an internet order, the student will receive a pre-order update e-mail saying that their pre-order has been updated. Listed in the e-mail are the courses with books and prices, and the internet order number that was created. Below are examples of the pre-order update e-mail, the first is a completed pre-order, and the second is a partially complete pre-order:

## RATEX University Textbook Pre-Order Update

Hi Jessica,

We just wanted to let you know that we've updated the status of your Textbook Pre-Order 10035. Please contact us if you have any questions about this pre-order.

Thanks for shopping with us,  
RATEX University Customer Service

**This Pre-Order has been completed. See Order number 800178.**

**Selected Options**

Required Materials Only

Preferred Materials: Used, New, Rental

**BIOAP - 200 Section 1**

SKU	Description	Type	Price
9780073661759	ANIMAL SCIENCES THE BIOLOGY CARE & PRODUCTION - USED	Required	\$73.25
9780321501554	PRINCIPLES OF ANIMAL PHYSIOLOGY - USED	Required	\$125.25
9781405134958	SCIENCE OF ANIMAL WELFARE - USED	Required	\$15.00

**BIOG - 100 Section 1**

SKU	Description	Type	Price
9780321633934	MASTERING BIOLOGY - USED	Required	\$72.25
9780073525556	PHOTO ATLAS FOR GENERAL BIOLOGY - USED	Required	\$48.75

**BIOGD - 300 Section 2**

SKU	Description	Type	Price
9781423203063	GENETICS LAMINATE REFERENCE CHART - USED	Required	\$4.50
9780072848533	HUMAN GENETICS: CONCEPTS & APPLICATIONS (P) - USED	Required	\$104.00

*eRATEX*

*Textbook Pre-Order Update E-mail Example*

## RATEX University Textbook Pre-Order Update

Hi Jessica,

We just wanted to let you know that we've updated the status of your Textbook Pre-Order 10043. Please contact us if you have any questions about this pre-order.

Thanks for shopping with us,  
RATEX University Customer Service

**This Pre-Order has been partially completed. Some courses may be included on separate orders.**

### Selected Options

Required and Optional/Recommended Materials  
Preferred Materials: Used Rental, New Rental, New

### Courses converted on Order 800214

#### ART - 100 Section 1

SKU	Description	Type	Price
00037	iClicker - Iclicker	Required	\$29.99
9780023078101	RELIGION IN AMERICA - NEW	Required	\$81.80

#### ENG - 100 Section 1

SKU	Description	Type	Price
9780582437418	INTRODUCTION TO ENGLISH GRAMMAR - NEW	Required	\$29.75
9780230208018	INTRODUCTION TO ENGLISH LANGUAGE: WORD SOUND - NEW	Required	\$34.00
9780748625413	INTRODUCTION TO ENGLISH PHONETICS - RENTAL	Required	\$14.75

#### SCI - 100 Section 1

SKU	Description	Type	Price
9781402087400	ADVANCES IN COMPUTER AND INFORMATION SCIENCES - NEW	Required	\$199.00

#### WRIT - 100 Section 1

SKU	Description	Type	Price
9780061999901	ON WRITING WELL 35TH ANNIVERSARY EDITION: THE - RENTAL	Required	\$9.00
9780060891541	ON WRITING WELL: THE CLASSIC GUIDE TO WRITING - NEW	Required	\$14.99
9780132785785	TECHNICAL COMMUNICATION - RENTAL	Required	\$66.75

### Courses converted on Order 800213

#### BIOAP - 100 Section 1

SKU	Description	Type	Price
9780073661759	ANIMAL SCIENCES THE BIOLOGY CARE & PRODUCTION - RENTAL	Required	\$58.50
9780321501554	PRINCIPLES OF ANIMAL PHYSIOLOGY - RENTAL	Required	\$100.25

### Courses still Pending

BIO - 500 Section 1

eRATEX

*Partially Complete Textbook Pre-Order Update E-mail Example*

The regular eRATEX receipt e-mail will also be sent with the order summary information, including shipping & handling charges, sales tax, order total, and the rental agreement, if rentals were purchased. Below is an example of the eRATEX Receipt e-mail:

**RATEX University Receipt**

\*\*\* PLEASE PRINT RECEIPT OUT AND RETAIN IT FOR FUTURE REFERENCE \*\*\*

**Order Number** 800178  
**Customer ID** 100885  
**Order Date** 5/8/2013 8:07:51 AM

**Bill To:**  
 Jessica Sobonya  
 2250 Hickory Road  
 Suite 10  
 Plymouth Meeting, PA 19462  
 United States  
 1-610-828-8630  
[jsobonya@ratex.com](mailto:jsobonya@ratex.com)

**Ship To:**  
 Jessica Sobonya  
 2250 Hickory Road  
 Suite 10  
 Plymouth Meeting, PA 19462  
 United States  
 1-610-828-8630

<b>Order Date:</b>	5/8/2013 8:07:51 AM	<b>Locale/Currency:</b>	en-US / USD
<b>Payment Method:</b>	Credit Card	<b>Name On Card:</b>	Jessica Sobonya
<b>Card Type:</b>	Visa	<b>Card Number:</b>	****

SKU:	Product	Quantity	Price	Ext. Price
9780073661759	<b>ANIMAL SCIENCES THE BIOLOGY CARE &amp; PRODUCTION-USED</b> Substitutions Allowed	1	\$73.25	\$73.25
9781405134958	<b>SCIENCE OF ANIMAL WELFARE-USED</b> Substitutions Allowed	1	\$15.00	\$15.00
9780073525556	<b>PHOTO ATLAS FOR GENERAL BIOLOGY-USED</b> Substitutions Allowed	1	\$48.75	\$48.75
9780321633934	<b>MASTERING BIOLOGY-USED</b> Substitutions Allowed	1	\$72.25	\$72.25
9780072848533	<b>HUMAN GENETICS: CONCEPTS &amp; APPLICATIONS (P)-USED</b> Substitutions Allowed	1	\$104.00	\$104.00
9781423203063	<b>GENETICS LAMINATE REFERENCE CHART-USED</b> Substitutions Allowed	1	\$4.50	\$4.50
9780321501554	<b>PRINCIPLES OF ANIMAL PHYSIOLOGY-USED</b> Substitutions Allowed	1	\$125.25	\$125.25

<b>Order Notes:</b> None	<b>SubTotal:</b>	\$443.00
	<b>Shipping:</b> Priority Mail	\$8.85
	<b>Tax:</b>	\$0.53
	<b>Total:</b>	\$452.38

*eRATEX Receipt Example*

If a textbook is added to a course request after the pre-order has been converted to an internet order, a separate e-mail will be sent alerting the student that a course has been updated with additional materials that were not included when the pre-order was completed. The e-mail will have a link to go directly to the product to purchase it. Below is an example of the Textbook Pre-Order Course Update Notice e-mail:

**RATEX University Textbook Pre-Order Course Update Notice**

Hi Jessica,

We just wanted to let you know that there has been an update to a course on your Textbook Pre-Order 10035. Additional materials were added to the course shown below after your pre-order was completed.

Please contact us if you have any questions about this pre-order.

Thanks for shopping with us,  
 RATEX University Customer Service

BIOG - 100 Section 1		
SKU	Description	Type
9780077349967	<a href="#">BIOLOGY</a>	Required

# ORDER FULFILLMENT

## PARAMETERS & SETUP

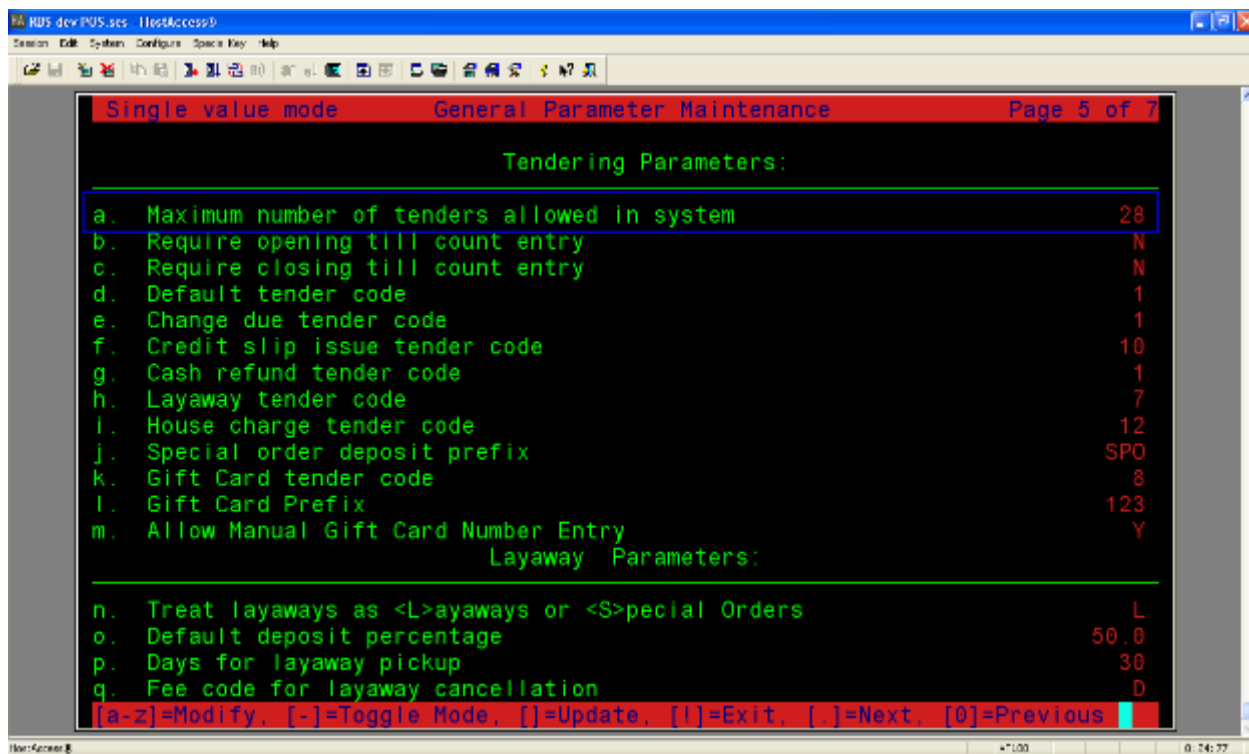
Order Fulfillment has a variety of parameters and additional setup options that are necessary to review to ensure that Order Fulfillment works properly and effectively.

## WEB TENDER SETUP

In order to process web orders, returns in POS\*Liberty, etc., web tender codes need to be set up in both POS\*Liberty and VisualRATEX.

### IN POS\*LIBERTY:

Check POS-PM-6 (General Parameters) – Maximum Number of Tenders Allowed in System. This parameter needs to be set to the appropriate number to accommodate the 4 web tender codes that must be added to the system. For example, if the maximum number of tender codes is 24, increase the number to 28 so the 4 web tender codes can be added.



Next, go to POS-PM-11-2 (Tender Code Maintenance). Four blank tender codes will be at the end of the list. Enter the line number to modify and create the tender codes. The tender codes are Web on Account (WA), Web Credit Card (WC), Web Gift Card (WG), and Web Student Card (WS).

*Example* screen shots of each tender code are listed below.

Tips: For WS (Web Student Card), enter the authorization service that campus cards will be authorized and settled under. CSGold is an example of an authorization service.

WC (Web Credit Card) does not require an authorization service because the credit cards are authed/settled in Cybersource. Beginning with release 37A .16, WC (Web Credit Card) will have an authorization service of “ERATEX” which is used for returns in POS\*Liberty.

TENDER CODE MAINTENANCE		POS. 806. B
Tn#	Tender Code Description	
18	CRS	
19	Blackboard TIA	
20	CSGold	
21	Travellers Checks	
22	Canadian Cash	
23	SCANPLUS	
24	Gift Card	
25	Web On Account	
26	Web Credit Card	
27	Web Gift Card	
28	Web Student Card	



TENDER CODE MAINTENANCE

POS.806.B

```

Tender Code..... 25

Description..... Web On Account_____
Status..... A Currency Code.... Require Amount Entry.. Y
Allow Exchanges..... Y Permit Change Due N Permit Auto Change Due N
Special Form Type... 1 Refund Form Type. Prompt Name On Refunds N
Print Check Face.... N 80 Column Receipt N Open Drawer..... N
Security Level..... 1 Refund Security.. 1 Cash Type Tender..... N
Endorse..... N Text
Endorse with Bank #..
Account # Required... Y Min. Length..... 1 Max. Length..... 16
Expiration Required.. N Mask Acct. Num... N Digits to display.....
Authorize This Tender Y Authorization Type AR
  Floor Limit..... 0.00 Filter Out Scholarships (Y/N)
  Bankcard Type..... Filter Out Credit Limit (Y/N)
  Auth. Service..... Check Digit Scheme
  Max Auth. Length... 0 Host Based Capture
Pattern Matching: Use DOM Account #.
  Requisition..... 0N Account..... 0N Charge Department..... 0N
    
```

TENDER CODE MAINTENANCE

POS.806.B

```

Tender Code..... 26

Description..... Web Credit Card_____
Status..... A Currency Code.... Require Amount Entry.. N
Allow Exchanges..... N Permit Change Due N Permit Auto Change Due N
Special Form Type... 1 Refund Form Type. Prompt Name On Refunds N
Print Check Face.... N 80 Column Receipt N Open Drawer..... N
Security Level..... 1 Refund Security.. 1 Cash Type Tender..... N
Endorse..... N Text
Endorse with Bank #..
Account # Required... Y Min. Length..... 4 Max. Length..... 32
Expiration Required.. N Mask Acct. Num... N Digits to display.....
Authorize This Tender Y Authorization Type B
  Floor Limit..... 0.00 Filter Out Scholarships (Y/N)N
  Bankcard Type..... * Filter Out Credit Limit (Y/N)N
  Auth. Service..... ERATEX Check Digit Scheme
  Max Auth. Length... 6 Host Based Capture Y
Pattern Matching: Use DOM Account #. N
  Requisition..... 0N Account..... 0N Charge Department..... 0N
    
```

TENDER CODE MAINTENANCE

POS.806.B

```

Tender Code..... 27
Description..... Web Gift Card_____
Status..... A Currency Code.... Require Amount Entry.. Y
Allow Exchanges..... Y Permit Change Due N Permit Auto Change Due N
Special Form Type.... 1 Refund Form Type. Prompt Name On Refunds N
Print Check Face..... N 80 Column Receipt N Open Drawer..... N
Security Level..... 1 Refund Security.. 1 Cash Type Tender..... N
Endorse..... N Text
Endorse with Bank #..
Account # Required... Y Min. Length..... 16 Max. Length..... 16
Expiration Required.. N Mask Acct. Num... N Digits to display....
Authorize This Tender Y Authorization Type GC
Floor Limit..... 0.00 Filter Out Scholarships (Y/N)N
Bankcard Type..... MV Filter Out Credit Limit (Y/N)N
Auth. Service..... Check Digit Scheme
Max Auth. Length... 6 Host Based Capture
Pattern Matching: Use DOM Account #. N
Requisition..... 0X Account..... 0X Charge Department..... 0X
    
```

TENDER CODE MAINTENANCE

POS.806.B

```

Tender Code..... 28
Description..... Web Student Card_____
Status..... A Currency Code.... Require Amount Entry.. N
Allow Exchanges..... N Permit Change Due N Permit Auto Change Due N
Special Form Type.... 1 Refund Form Type. Prompt Name On Refunds N
Print Check Face..... N 80 Column Receipt N Open Drawer..... N
Security Level..... 1 Refund Security.. 1 Cash Type Tender..... N
Endorse..... N Text
Endorse with Bank #..
Account # Required... Y Min. Length..... 4 Max. Length..... 16
Expiration Required.. N Mask Acct. Num... N Digits to display....
Authorize This Tender Y Authorization Type B
Floor Limit..... 0.00 Filter Out Scholarships (Y/N)N
Bankcard Type..... Filter Out Credit Limit (Y/N)N
Auth. Service..... FAUXDEBIT Check Digit Scheme
Max Auth. Length... 0 Host Based Capture Y
Pattern Matching: Use DOM Account #. N
Requisition..... 0N Account..... 0X Charge Department..... 0X
    
```

## IN VISUALRATEX:

Once the web tender codes have been added in POS\*Liberty, go to VisualRATEX, Sales Audit > Utilities > Tender Maintenance. Click the Build from POS\*Liberty button to import the POS web tender codes.

VisualRATEX - Tender Maintenance

Record Edit Help

Code	Description	Stat	System	Begin Balance	Currency Code	Acct No. Req'd	Expire Req'd	GL Cash Mgmt	Rpt	Non Cash Flag	Bank Service
10	CREDIT SLIP ISS	A		0.00		Y	N	1	2	N	
11	SPO REDEEM	A	AR	0.00		Y	N	1	3	N	
12	A/R HOUSE ACCOU...	A	AR	0.00		Y	N	1	3	N	
13	CANADIAN CASH	A	CC	0.00		N	N	1	5	N	
14	JCB CARDS	A		0.00		Y	Y	1	3	N	VISANET
15	ENGLISH POUNDS	A	CC	0.00		N	N	1	3	N	
16	CARTE BLANCHE	A	CC	0.00		Y	Y	1	4	N	FAUX
17	DINERS CLUB	A		0.00		Y	Y	1	4	N	FAUX
18	ALL BANKCARDS	A	CC	0.00		Y	Y	1	4	N	FAUX
19	BLACKBOARD TIA	A	CC	0.00		Y	N	1	4	N	FAUXDEBIT
20	CSGOLD	A		0.00		Y	N	1	4	N	CSGOLD
21	TRAVELLERS CHECKS	A		0.00		Y	N	1	5	N	
22	CANADIAN CASH	A	CC	0.00		N	N	1	5	N	
23	A/R SCHLSHP & DE...	A		0.00		Y	N	1	5	N	
24	GIFT CARD	A	AR	0.00		Y	N	1	6	N	
25	WEB ON ACCOUNT	A		0.00		Y	N	1	6	N	
26	WEB CREDIT CARD	A	CC	0.00		Y	N	1	6	N	ERATEX
27	WEB GIFT CARD	A		0.00		Y	N	1	6	N	
28	WEB STUDENT CARD	A	CPO	0.00		Y	N	1	6	N	FAUXDEBIT

Build From POS\*Liberty

14 | jksobonya:RBS037 | Requirec SALES.TENDER.MNT | Sec 1 | Line 1 | No help available

SALES.TENDER.MNT  
Sales Tender Maintenance screen

Next, go to Admin > Parameters > AvParameter. Select SALES.ORDER from the dropdown. Add the web tender codes to the Information & Data 1 sections. Once the web tender codes have been added to SALES.ORDER, the setup is complete.

VisualRATEX - AvParameter Maintenance

Record Edit Help

SALES.ORDER

\* Description The payment type and corresponding tender code are listed under Information and Data1 respectively. The register sales orders are authed and settled under is value 1 of Data2 and the drawer is value 2 under Data2. The fee code for shipping and handling is value 3 of Data2 and the respective account is value 4 of Data2. The tax code for sales tax is value 5 of Data2 and the GST code is value 6 of Data2. The default markdown

\* Type X Restricted access \* Account A All accounts Date Modified

Information	Data1	Data2	Data3	Data4	Data 5
CA	1	26	I		N 2
SC	1	1	50.00		N N
CK	2	A	CB		N C:\Users\jks...
SK	2	80160	Y		
MC	3	A	WS		
VI	3	G			
DI	4	A			
AX	5	C			
GC	8				
OA	12				
WA	25				
WB	26				
WC	26				
WD	6				
WG	27				
WS	28				

14 jksobonya:RBS037 Requirec AV.PARAMETER.MNT Sec1 Line1 A textual description of the purpose and use of this particular parameter. This inform...

AV.PARAMETER.MNT

AvParameter Maintenance screen, SALES.ORDER

## WEB REGISTER SETUP

eRATEX sales are processed through a web register. Like the web tender setup, the web register needs to be defined in POS\*Liberty and VisualRATEX.

### IN POS\*LIBERTY

The web register definition should look similar to registers previously defined in POS\*Liberty. The web register does not need keyboard map or printer setup. To set up a web register, go to POS-PM-2 (Register Maintenance), select a store, and add the new web register. Below is an example of what the web register should look like:



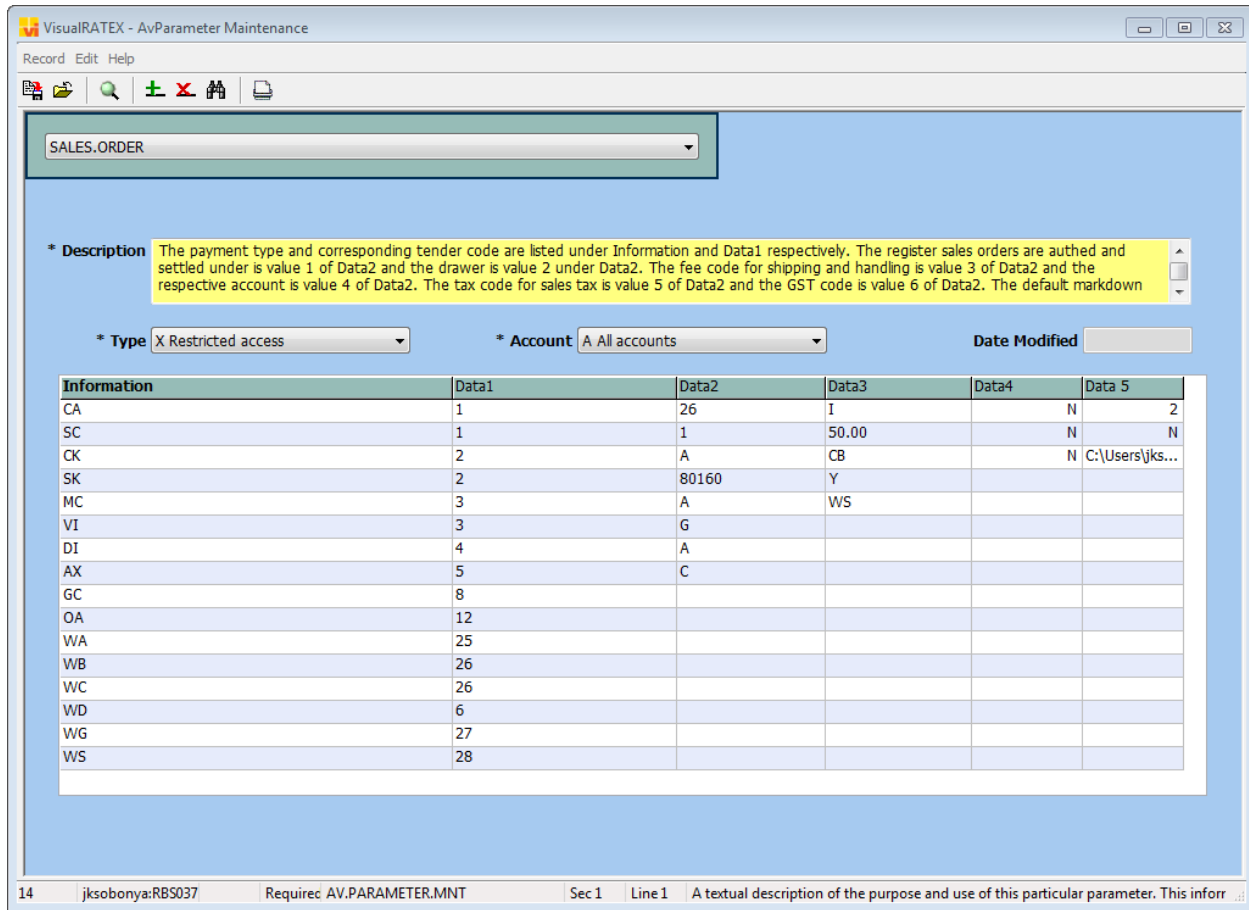
### IN VISUALRATEX

Once the web register has been defined in POS\*Liberty, it must be imported into VisualRATEX. In VisualRATEX, go to Sales Audit > Utilities > Register Maintenance. Click the Build from POS\*Liberty button to import the web register.

The web register must be entered in AV.PARAMETER SALES.ORDER, Data2, Value 1, so Order Fulfillment will process the web orders will be through the web register.

## Sales Order Parameter Setup

An important setup screen in the eRATEX/Order Fulfillment module is AV.PARAMETER SALES.ORDER:



AV.PARAMETER.MNT  
AvParameter Maintenance screen, SALES.ORDER

Location: Admin > Parameters > AvParameter. Select SALES.ORDER from the dropdown.

This screen controls a lot of Order Fulfillment functionality, including how certain attributes are written to the sales transaction records. If these parameters are not set up properly, Order Fulfillment will not function properly!

The screen is divided into several columns of parameters. Each column is described below.

## Information & Data1

Information	Data1
CA	1
SC	1
CK	2
SK	2
MC	3
VI	3
DI	4
AX	5
GC	8
OA	12
WA	25
WB	26
WC	26
WD	6
WG	27
WS	28

These columns should already look familiar from the Web Tender section above. Here, the web tenders are defined; the web tender prefixes and numbers should be identical to the web tenders in SALES.TENDER.MNT. The tenders defined here will be written to sales orders in Order Fulfillment, and will be written to sales transaction records when sales orders are processed and closed in Order Fulfillment.

## Data2

Data2
26
1
A
80160
A
G
A
C

Cells 1 & 2 – These two cells define the register and drawer that web sales will be authed and settled under. In the screen capture above, the register is 26 and the drawer is 1. Change these values to **the bookstore's web register and drawer**.

Cell 3 – This cell defines the Shipping & Handling Fee Code. This code is maintained in POS\*Liberty. In POS\*Liberty, go to PM – 11 – 3 (Fee Definition). Fees/credits are defined here. Enter the POS fee code that has been set up for shipping & handling in Cell 3.

Cell 4 – This cell defines the GL Account the S&H will be applied to. Enter a GL Account in Cell 4.

Cell 5 – This cell defines the default Sales Tax Code, which is based on the default tax code in Store Maintenance in POS. In POS\*Liberty, go to PM – 1 – select a store and press Enter. The default tax code will display at the top of the screen. Enter the default tax code in Cell 5.

Cell 6 – If applicable, enter a GST Code in Cell 6. (This is for Canadian clients only.)

Cell 7 – If applicable, enter a POS Markdown Code. This code is used to record promotions/discounts (i.e. PCDs) on sales order transactions. In POS\*Liberty, go to PM – 11 – 5 (Item Discount Modifiers). Enter the appropriate markdown code in Cell 7.

Cell 8 – If coupons will be used in eRATEX, enter a Coupon Code. In POS\*Liberty, go to PM – 11 – 3 (Fee Definition) and enter the coupon code in Cell 8.

### Data 3

Data3
I
50.00
CB
Y
WS

When a customer places an order on eRATEX, and the customer does not exist in VisualRATEX, a customer record is created in VisualRATEX and will be given several default settings as defined in Data3. Other settings in this column are for the customer credit limit and order handling.

Cell 1 – When a new customer record is created, the Customer Type is I-Internet. (The Customer Type of I-Internet needs to exist in the the CD.CF.TYPE file.)

Cell 2 – This cell defines the customer credit limit (the default is zero so there are no credit limits).

Cell 3 – This cell defines the default handling of an order. Every sales order that comes through Order Fulfillment will be given the handling code defined here. There are three handling options supported by Order Fulfillment: NB (No Backorders), CB (Ship Current – Backorder Balance), CN (Ship Current – No Backorder).



Cell 4 – When a new customer record is created, this cell defines what the Taxable Flag will be – Y or N.

Cell 5 – When new customer records are created, the Source is WS-Web Sales File Load. (The Source of WS – Web Sales File Load needs to exist in the CD.CF.SOURCE file.)

Cell 6 – This cell defines the “Web Selling Term” – it can be used to print course information on pick lists. By default, the current selling term is used to print course information on pick lists. A different term can be entered in this cell will override the selling term. If null, the current selling term is used to print course information on pick lists.

Data 4

Data4
N
N
N

Cell 1 – This cell defines whether the Auto Print Pick Lists logic is on or off. Y turns Auto Print Pick Lists on and N turns it off.

Cell 2 – This cell is used for UPS integration with Order Fulfillment, which is functional in VisualRATEX release 37A .17 or later. Please contact RBS to setup and use this functionality.

Cell 3 – This cell is used for FedEx integration with Order Fulfillment which is still being developed. This should be set to N.

Data 5

Data 5
2
N
C:\Users\jks...

Cell 1 – This cell can be used to print a backorder packing list instead of the regular packing list. Enter a “1” to use the regular packing list (packinglist.doc) or a “2” to use the backorder packing list (packinglist2.doc).

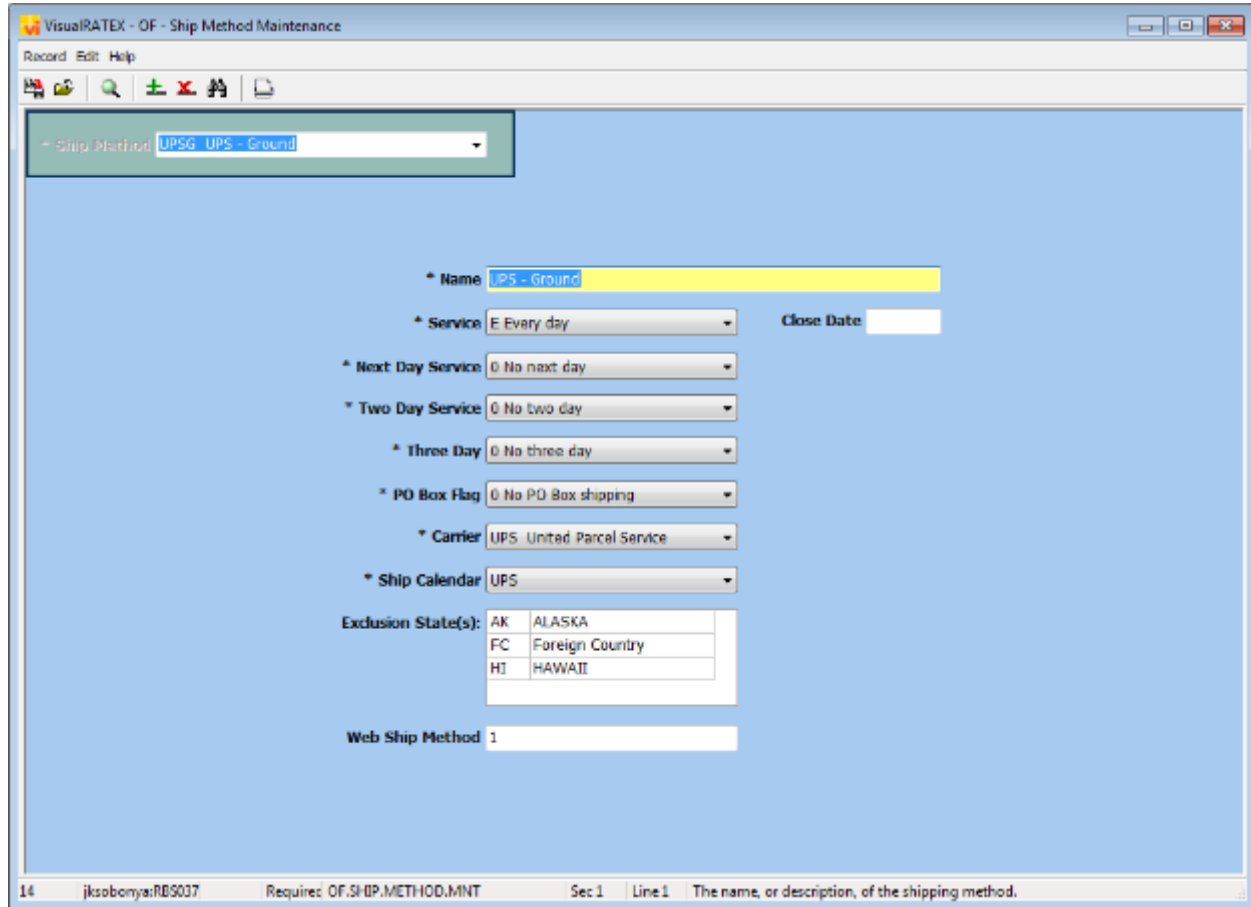
Cells 2 & 3 – These cells can be used to print an image thumbnail pick list. Enter a “T” in cell 2 to use the image pick list. A null or “N” will use the regular pick list. Cell 3 must be defined with the FULL path to the thumbnail images. The thumbnail pick list logic requires template picklist3.dotm.

## Shipping Method Setup

Each shipping method being offered in eRATEX needs to be defined in Order Fulfillment.

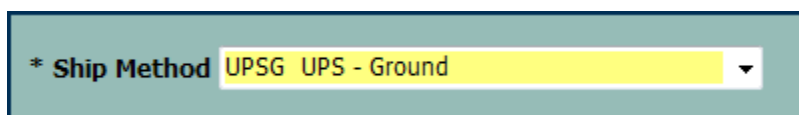
### **VR - SHIPPING METHOD MAINTENANCE**

In Order Fulfillment, shipping methods are maintained in Order Fulfillment > Maintenance & Setup > Ship > Methods, as shown below:

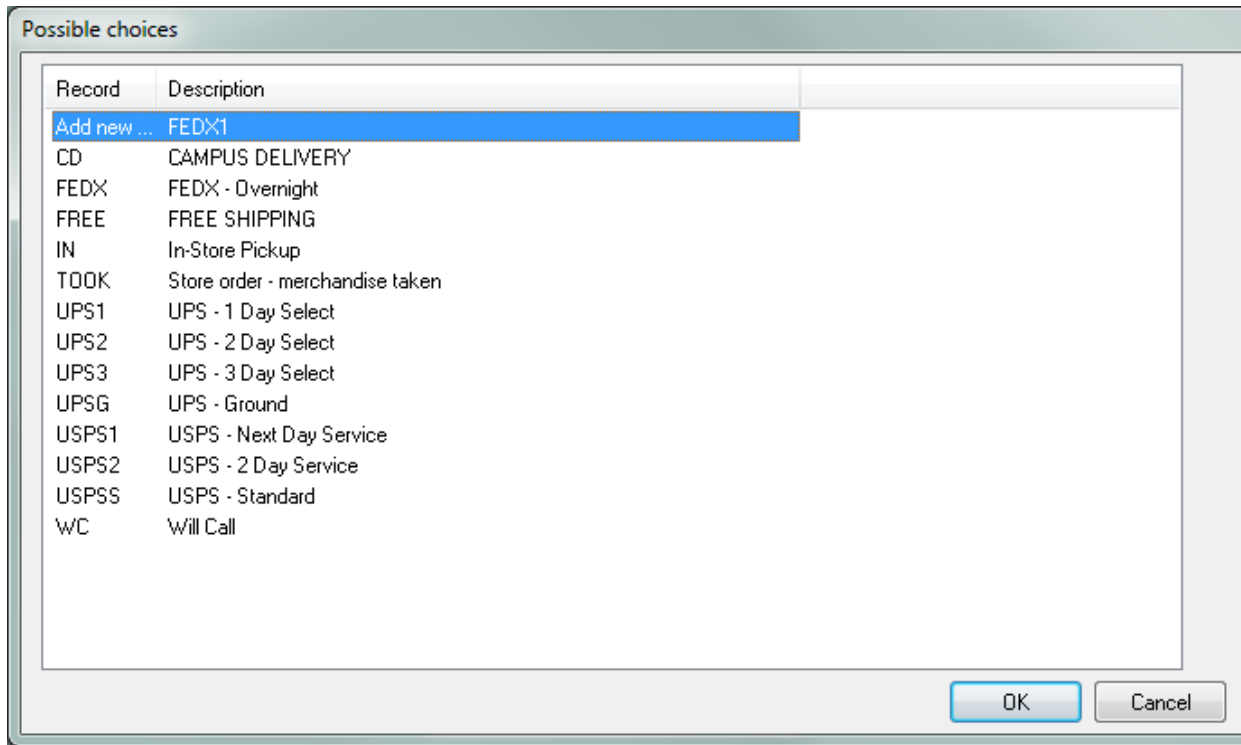


OF.SHIP.METHOD.MNT  
Shipping Method Maintenance screen

RBS provides several default shipping methods which can be used, or new shipping methods can be created. To add a new shipping method, type the shipping method code for the shipping method in the Ship Method field and press the Enter key:



A Possible Choices prompt will appear with an option to add the new shipping method:



Various criteria can be defined for the shipping method, for example, what days of the week the shipping method provides service, whether the shipping method provides next day, two day delivery, or three day delivery, or PO Box delivery. A Ship Calendar must also be defined properly for the shipping method. Lastly, the shipping method needs to be defined with a Web Ship Method number. Every shipping method that is created in the eRATEX Admin is assigned an ID number:

<a href="#">Home</a> <a href="#">Orders</a> <a href="#">Products</a>		
<b>Now In: Shipping Methods</b>		
<a href="#">Add New Shipping Method</a> <a href="#">Configure rates</a>		
ID	Method	Display Order
1	UPS Ground	<input type="text" value="1"/>
2	UPS 2nd Day	<input type="text" value="1"/>
3	UPS Next Day	<input type="text" value="1"/>
6	In-Store Pickup	<input type="text" value="1"/>

This ID number must be mapped to the Web Ship Method field so Order Fulfillment will recognize and assign the correct shipping method to the sales order.

Once this criteria has been entered for the shipping method, save (F10) the shipping method. Create/modify any additional shipping methods.

**Tip:**

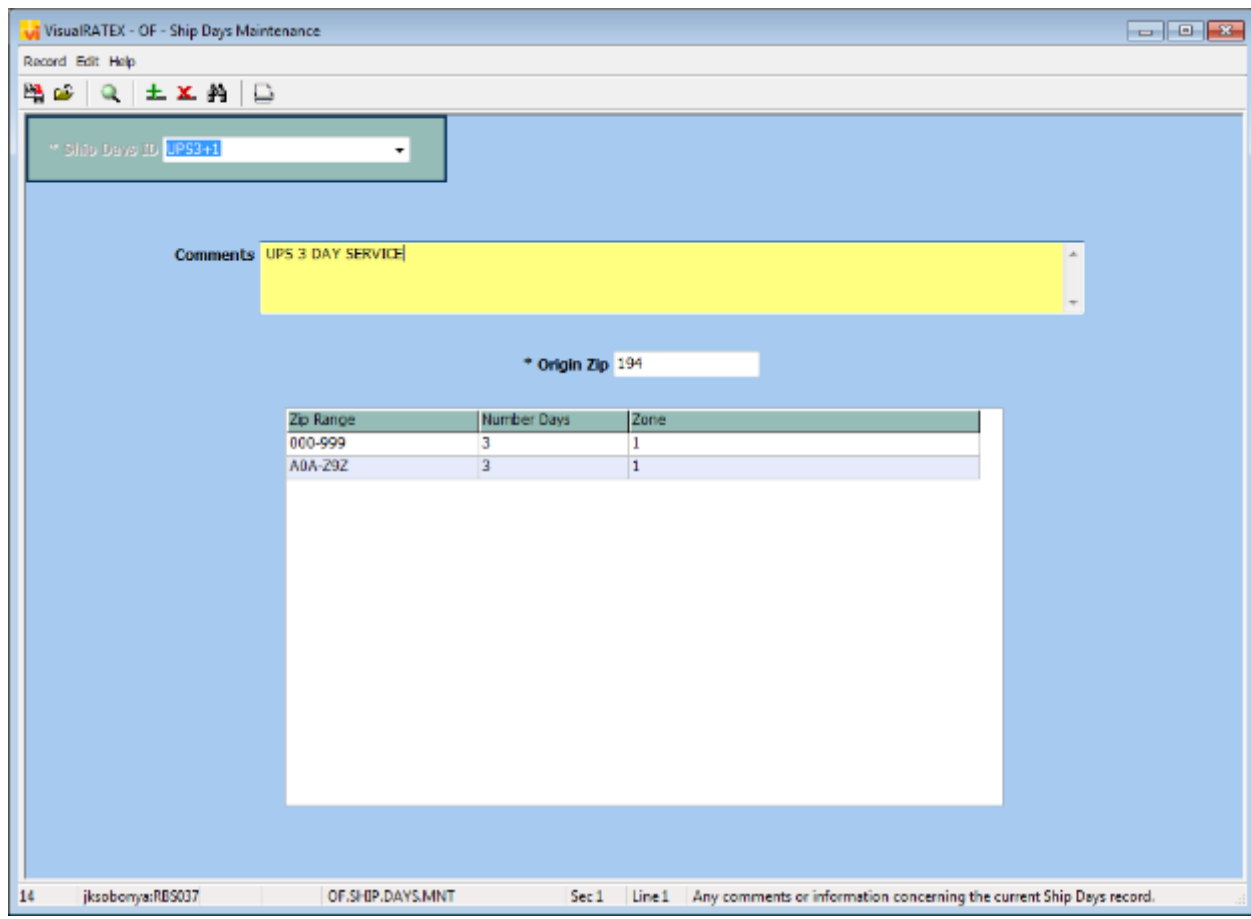
If free shipping is offered in eRATEX, the shipping method ID number is 0 (zero). Create a shipping method in VisualRATEX for free shipping (ex. FREE) with a Web Ship Method number of 0.

## **VR - SHIP DAYS MAINTENANCE**

---

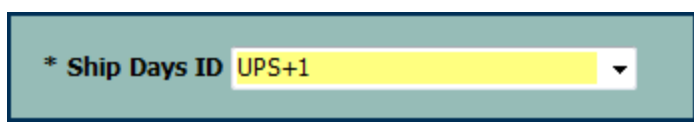
In addition to creating the shipping method, a corresponding Ship Days record needs to be created as well. The Ship Days record calculates how long it will take (in days) for an order to arrive to its destination based on zip code ranges.

In Order Fulfillment, Ship Days records are maintained in Order Fulfillment > Maintenance & Setup > Ship > Days, as shown below:

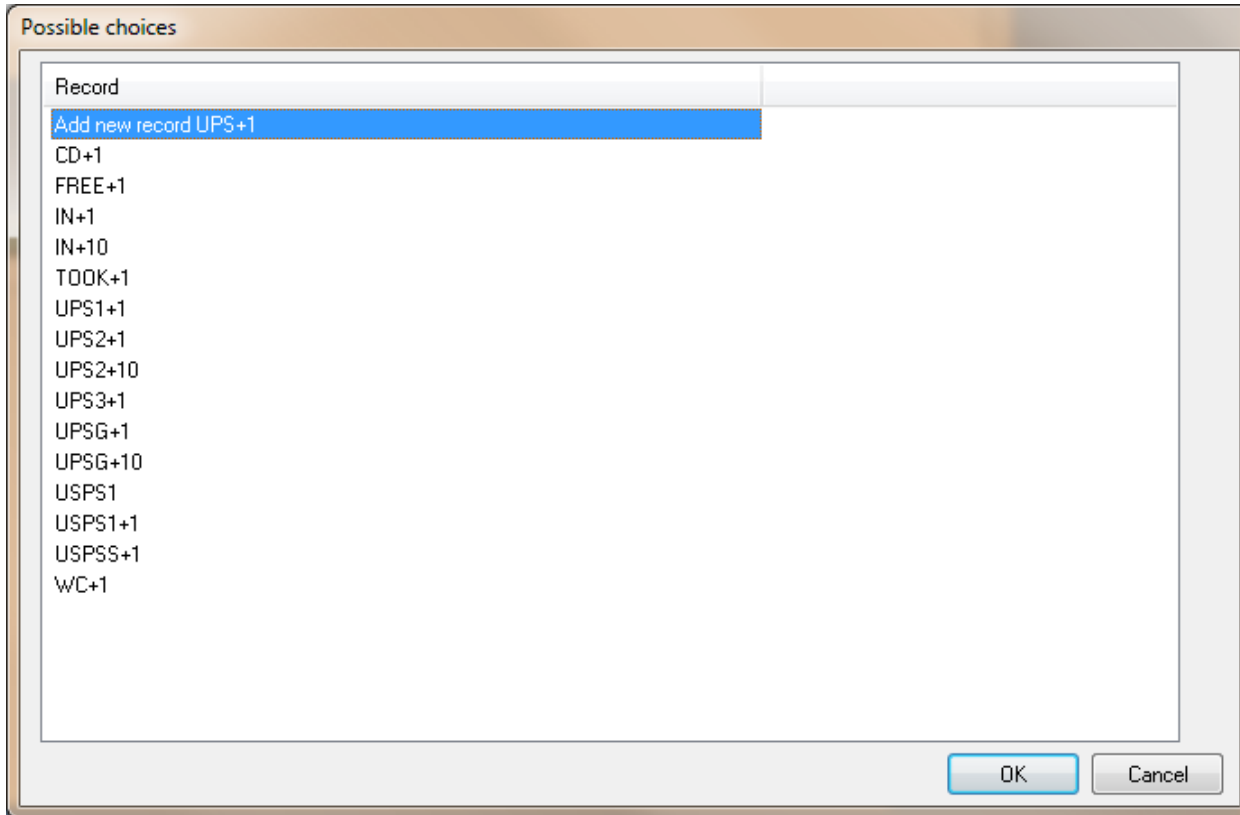


OF.SHIP.DAYS.MNT  
Ship Days Maintenance screen

To add a new Ship Days record, type the shipping method code plus a store number in the Ship Days field and press the Enter key:



A Possible Choices prompt will display with an option to add the new Ship Days record:



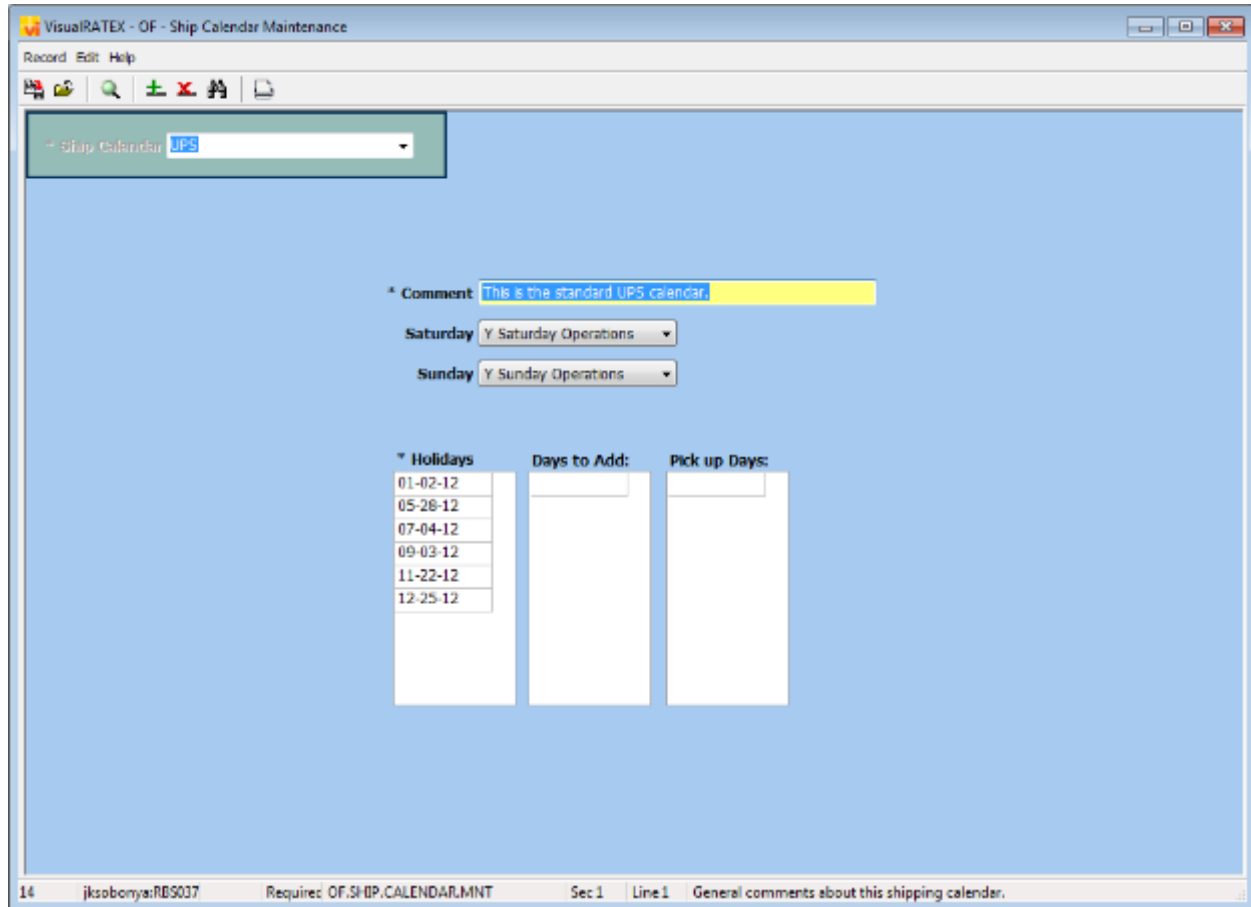
Enter an origin zip code (first 3 characters), a zip code range, and the number of days it will take for the item to arrive to its destination based on the origin zip and zip range entered. Comments can be entered about the Ship Days record, if necessary.

Once the criteria has been entered, save (F10) the Ship Days record. Enter/modify any other Ship Days records for the remaining shipping methods.

## **VR - SHIPMENT CALENDARS**

Shipment calendars must be defined for every shipping method/carrier (UPS, USPS, etc.) in Order Fulfillment. Shipping calendars are used to define holidays and other unique days where the carrier WILL or WILL NOT be shipping products. The dates defined in the shipping calendar assist in calculating the Schedule and Arrival Date of every sales order in Order Fulfillment. The shipment calendars must be kept up to date or else the Schedule & Arrival Dates may not be calculated correctly.

In Order Fulfillment, Shipment Calendars are maintained in Order Fulfillment > Maintenance & Setup > Shipment Calendars, as shown below:



*OF.SHIP.CALENDAR.MNT  
Shipment Calendars screen*

Select a shipment calendar to edit from the Ship Calendar dropdown.

Select whether the carrier operates on Saturdays or Sundays, what holidays the carrier does not work, unusual days where the carrier normally does not work but IS working, and days the carrier picks up but does not deliver.

Once the criteria has been entered, save (F10) the shipment calendar. Modify any other shipment calendars.

**Tip:**

Federal holidays for the year are typically added to the base shipment calendars during client installation. It is up to the client to make sure the ship calendars are kept up to date every year.

## SALES TAX SETUP

---

Sales tax rates must be defined in Order Fulfillment in addition to eRATEX. If a sales order is modified, Order Fulfillment needs to know the applicable sales tax rate to charge on products and freight.

**Tip:**

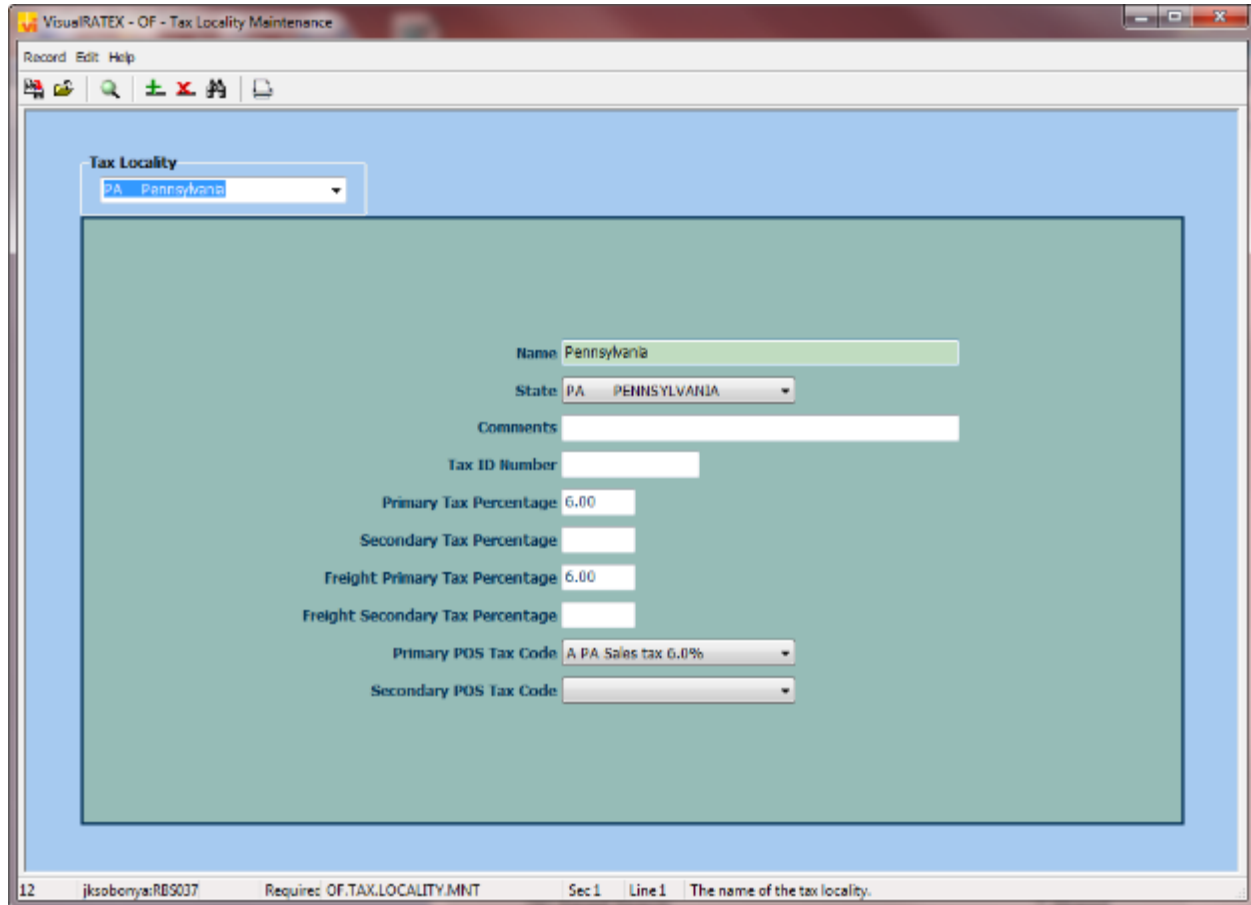
In the 37A .18 release of VisualRATEX, the sales tax structure has changed to allow for multiple tax codes, tax rates, and tax exemptions by class. The current method and the 37A .18 method is described below.

## TAX LOCALITY SETUP - 37A .17 (AND PRIOR)

---

In Order Fulfillment, sales tax rates are maintained in Order Fulfillment > Maintenance & Setup > Tax Localities, as shown below. In 37A .17, the menu path has changed to Admin > Parameters > Tax Localities in preparation for the new tax logic.





*OF.TAX.LOCALITY.MNT  
Tax Locality Maintenance screen*

To enter/maintain sales tax rates for a tax locality, select a tax locality from the dropdown. If the tax locality does not exist, enter the tax locality code (state abbreviation, zip code, etc.) and press Enter. A prompt to add a new record will display. Click OK to add the new tax locality to the system.

Enter the primary tax rate and secondary tax rate into the Primary Tax Percentage and Secondary Tax Percentage fields. If tax is being charged for freight, add tax rates to the Freight Primary Tax Percentage and Freight Secondary Tax Percentage fields. A corresponding primary/secondary POS tax code must be entered for the primary/secondary tax percentages as well.

When finished, press F10 to save the information.

### **TAX LOCALITY SETUP - 37A .18**

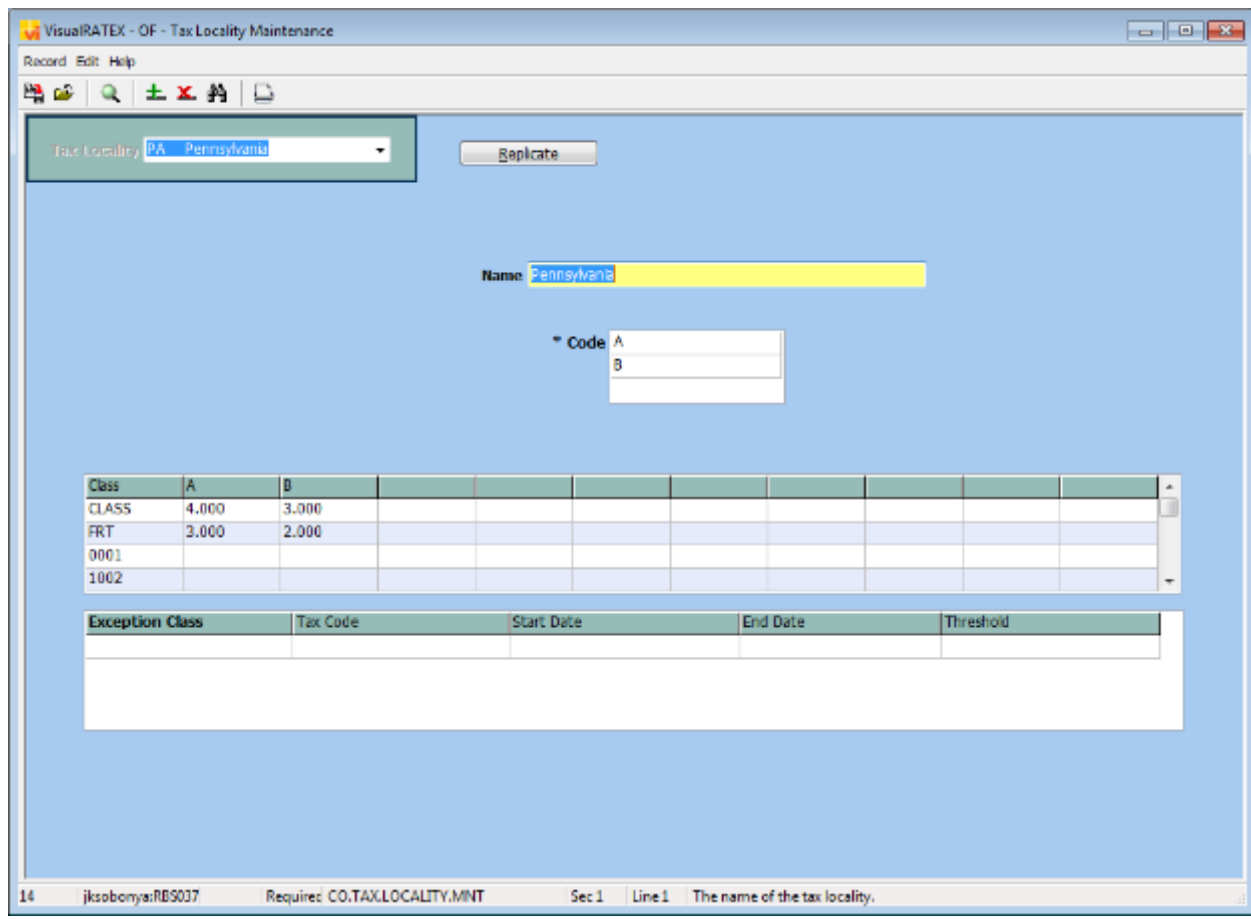
In 37A .18, the tax locality screen has changed significantly, allowing for an unlimited number of sales tax codes and sales tax rates. The software is no longer bound by two tax rates (primary and secondary); you can have as many rates as you wish for whatever sales tax needs to be collected.

For eRATEX/OF clients who already have sales tax rates defined in the 37A .17 version of the Tax Locality screen, the sales tax rates and POS tax codes will be converted to the new screen format when they are upgraded to 37A .18.

Below is an explanation of the new screen and logic.

At the top of the Tax Locality screen, select a Tax Locality from the dropdown and press Enter. The name of the tax locality, the applicable tax codes, and the tax rates will display in the screen. The center grid displays the **tax rates for class and freight, as well as any class “exceptions”, in other words, classes that do not charge any tax** (based on the primary/secondary tax flags in Inventory Class Maintenance), or a class that has the primary tax flag set to Yes and the Secondary Tax Flag set to No, or vice versa. The classes that do not charge tax will not have any tax rates next to them. If a class does not display in the grid, it charges tax based on the CLASS tax rate in the first line.

The Exception Class grid at the bottom of the screen is used to exempt a class from charging sales tax for a certain period of time. For example, certain states have **“tax holidays” during certain parts of the year, and this logic will prevent sales tax from being charged based on the classes listed in the Exception Class grid.**

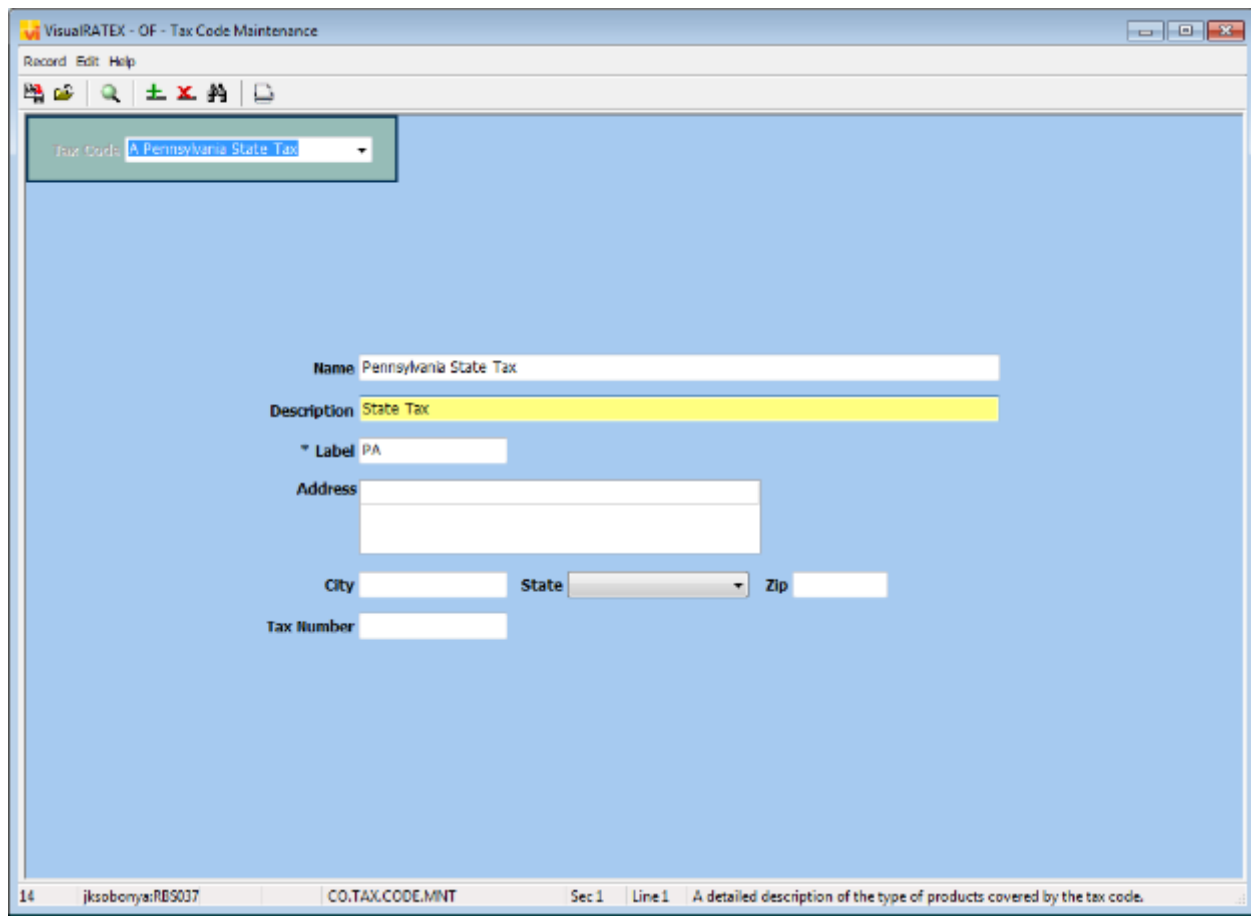


*CO.TAX.LOCALITY.MNT  
Tax Locality Maintenance screen*

An existing tax locality can be replicated by opening the tax locality to replicate, clearing the screen, creating a new tax locality, and then clicking the “Replicate” button at the top of the screen. This will allow for easy additions of new tax localities (by zip code, for example), and the user will not have to manually enter all of the data in the Class and/or Exception Class grids.

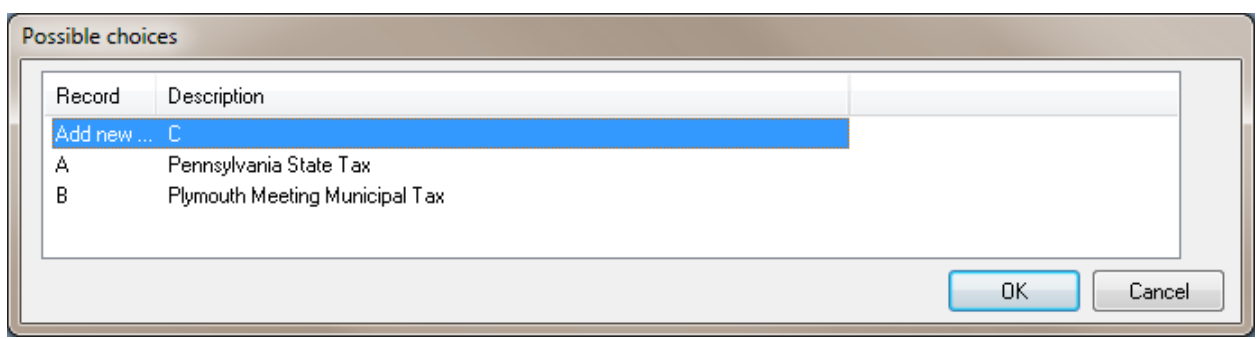
### **TAX CODE SETUP - 37A .18**

When the tax localities are converted to the new Tax Locality screen, the POS Tax Codes that were associated with the tax localities are added to a new screen called “Tax Codes.” This screen is located at the following menu path: Admin > Parameters > Tax Codes, as shown below:



CO.TAX.CODE.MNT  
Tax Code screen

The tax codes can be modified to include information like a description, label, address, and tax number. New Tax Codes can be added by entering the tax code at the top of the screen, pressing Enter, and selecting “Add New Record” from the Possible Choices list:



Once the tax codes have been added to the Tax Code screen, they can be associated to a tax locality in Tax Locality Maintenance.

## HANDLING/BACKORDER OPTIONS

---

Order Fulfillment can process sales orders in a number of different ways. Three handling codes that Order Fulfillment supports are:

NB – No backorders, ship when complete

CB – Ship current, backorder balance

CN – Ship current, no backorder

By default, every sales order is stamped with a default handling code; the default handling code is defined in the [Sales Order Parameter setup](#).

Each method is explained in detail below.

### **NB**

---

If NB is the default handling method, sales orders will not be pickable until ALL items on the order have the necessary stock to fulfill the order.

### **CB**

---

If CB is the default handling method, when sales orders are processed in Order Fulfillment, all items on the order that have stock will be placed on shipment 001, and items that do not have stock will be placed on a separate shipment, shipment 002. Shipment 001 can be picked immediately, and the second shipment can be picked when stock for the items are replenished. This is the default handling method recommended by RBS.

### **CN**

---

If CN is the default handling method, when sales orders are processed in Order Fulfillment, all items on the order that have stock will be placed on shipment 001, and items that do not have stock will be canceled automatically. CN will only work on single shipment orders. Multiple shipments do not honor the CN handling.

## SALES ORDER PROCESS FLOW

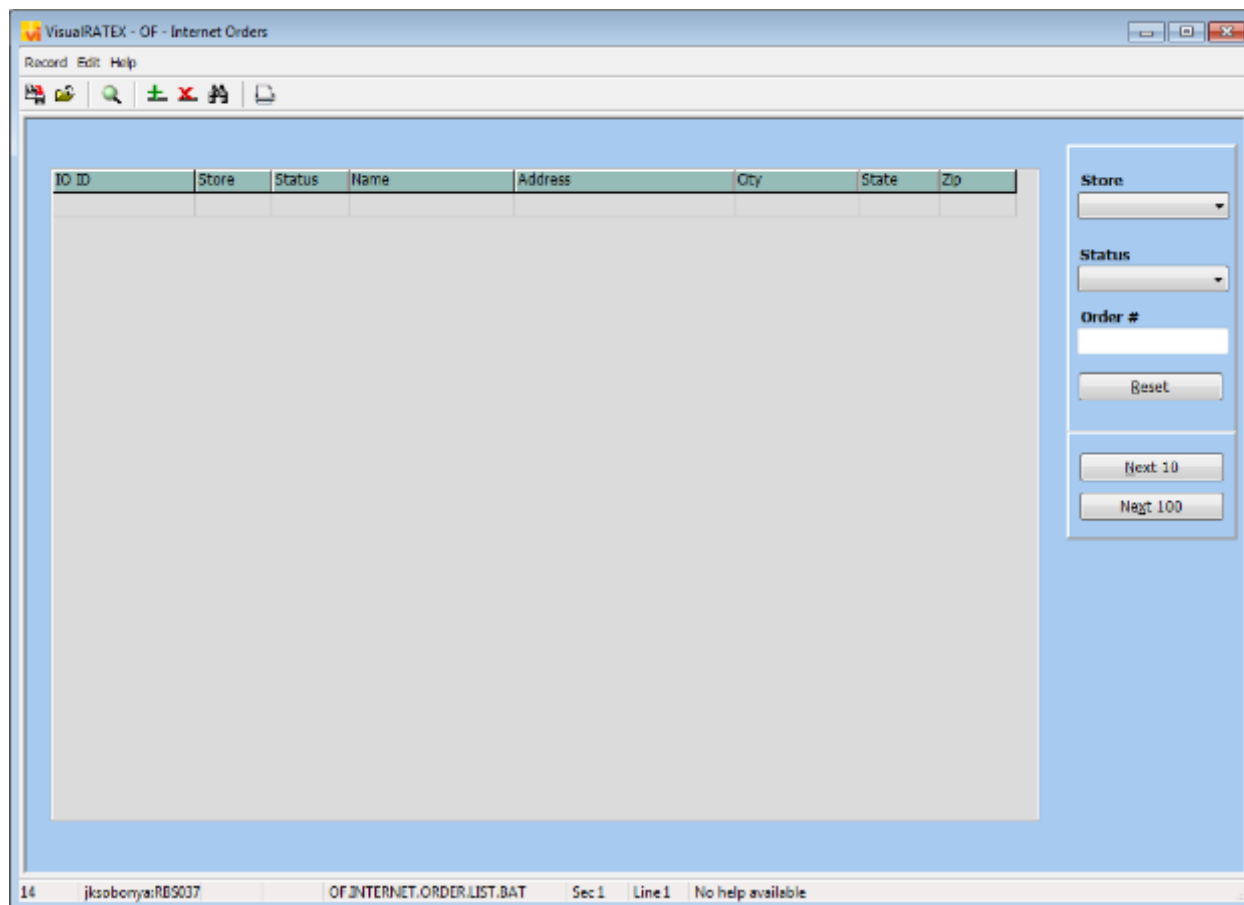
When a web order (WO) is placed online, it is downloaded to Order Fulfillment as an internet order (IO). The internet order is checked for accuracy and is converted to a sales order (SO).

## INTERNET ORDERS

---

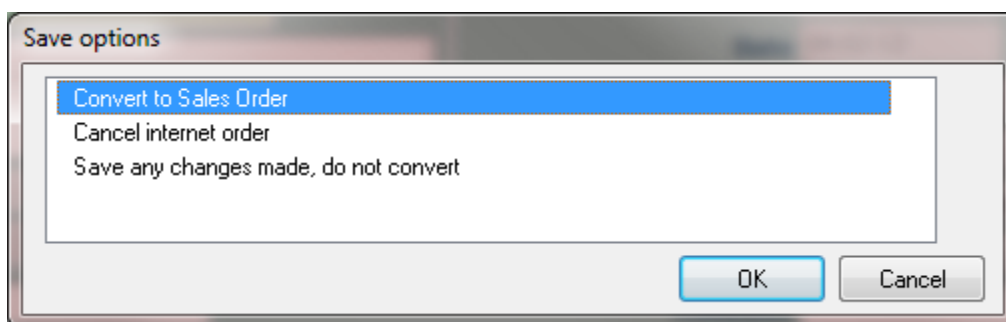
During the internet order to sales order conversion, the internet order data is checked for accuracy. Address information including zip code validation, ISBNs/SKUs, sales tax, shipping methods, and more are checked to ensure that the appropriate data is properly defined in VisualRATEX.

If there is a data problem with an internet order, it will not convert to a sales order. The internet order will need to be evaluated in the Internet Order processing queue, located at Order Fulfillment > Order Entry and Customer Service > Internet Order Processing:



*OF.INTERNET.ORDER.LIST.BAT  
Internet Order Processing screen*

Open an order to review it. Convert the internet order to a sales order by pressing F10 and selecting Convert to Sales Order:



The internet order will convert to a sales order.

If there is still a data problem with the internet order, a message will display explaining the problem and what needs to be done to properly convert the internet order to a sales order.

To cancel an internet order, open the internet order, press F10, and select “Cancel internet order.” The internet order will be canceled.

See Appendix D for a list of internet order messages and how to resolve them.

## **CUSTOMER MATCHING**

---

During the internet order to sales order conversion, the customer record database in VisualRATEX is evaluated. If the e-mail address on the internet order matches an e-mail address on an existing customer record, that customer record is used on the internet order and resulting sales order. If there is no e-mail match, a brand new customer record is created.

This logic is applied to every internet order except internet orders using the WA (Web On Account) (AR) payment type. If an internet order is using the WA (AR) payment type, the account number entered during eRATEX checkout is evaluated against the customer record database to find a match, NOT the e-mail address. If there is no match, the internet order remains in the internet order queue and is not converted to a sales order. A new customer record is not created. The internet order must be evaluated and corrected by a) creating the customer in VisualRATEX with the account number on the internet order, or b) entering the correct account number in the Payment Type area of the internet order. Once the correct account number is on the internet order and in VisualRATEX, the internet order can be converted to a sales order.

## **SALES ORDERS**

---

When internet orders convert to sales orders, they will display in a Sales Order Overview screen, located at Order Fulfillment > Sales Order Overview:

Order #	Internet Order	Name	Customer ID	Order Date	Days Pend	Qty	Lines	Store	O/C	Retail	Status	Pick
1000507	110429	JESSICA SOBONYA	000000582	07/09/12	99	6	6	1	0	25.74	INPR	
1000546	110470	JESSICA SOBONYA	000000582	09/13/12	33	2	2	1	0	173.39	INPR	
1000551	110475	JESSICA SOBONYA	000000582	09/18/12	28	3	3	1	0	44.99	INPR	
1000553	110478	JESSICA SOBONYA	000000582	09/20/12	26	10	2	1	0	9.90	INPR	
1000563	110488	JESSICA SOBONYA	000000582	09/27/12	19	1	1	1	0	46.17	INPR	
1000565	110490	JESSICA SOBONYA	000000582	09/27/12	19	3	3	1	0	98.53	INPR	
1000568	110493	JERE WARNER	000000158	09/27/12	19	1	1	1	0	46.17	INPR	
1000569	110494	JESSICA SOBONYA	000000582	09/27/12	19	8	7	1	0	138.91	INPR	
1000575	110501	JEFF ZAYICEK	000000209	10/10/12	6	3	3	1	0	250.68	INPR	
1000579	110507	JEFF ZAYICEK	000000209	10/10/12	6	2	2	1	0	287.74	INPR	
1000580	110508	JEFF ZAYICEK	000000209	10/10/12	6	1	1	1	0	103.36	INPR	
1000583	110503	JESSICA SOBONYA	000000582	10/15/12	1	1	1	1	0	48.59	INPR	Y
1000584	110506	JESSICA SOBONYA	000000582	10/15/12	1	1	1	1	0	48.59	INPR	Y
1000585	110510	JESSICA SOBONYA	000000582	10/15/12	1	1	1	1	0	17.11	INPR	Y

Item Link	Description	Qty	N/U/R	System Flag	Retail	Line status	Shipment	Tax	Ext Retail
2903899	RBS HAT	1	N	GM	9.99	XUTL	001	0.00	0.00
2903077	RBS SWEATSHIRT	1	N	GM	49.99	XUTL	001	0.00	0.00
2903139	VISUALRATEX SWEATSHIRT	1	N	GM	39.95	XUTL	001	0.00	0.00
2902990	PAPER MATE SPIRIT BALL PEN	1	N	GM	0.99	XMIN	002	0.00	0.00

OF.SALES.ORDER.LIST.BAT  
Sales Order Overview screen

A normal sales order will have a status of In Process (INPR) and line statuses of Ready To Pick (RDPK). If the sales order meets the criteria, it is ready to go through the sales order process flow of:

- Picking the order
- Pick Verifying the order
- Shipping/Closing the order

Only orders that have a status of INPR/RDPK can be picked. If the sales order has a status other than INPR/RDPK, it will need to be reviewed to determine why it is in that status, and be released from that status. An explanation of common order statuses, and how to release them, are explained in Appendix B.

## SALES ORDER HANDLING

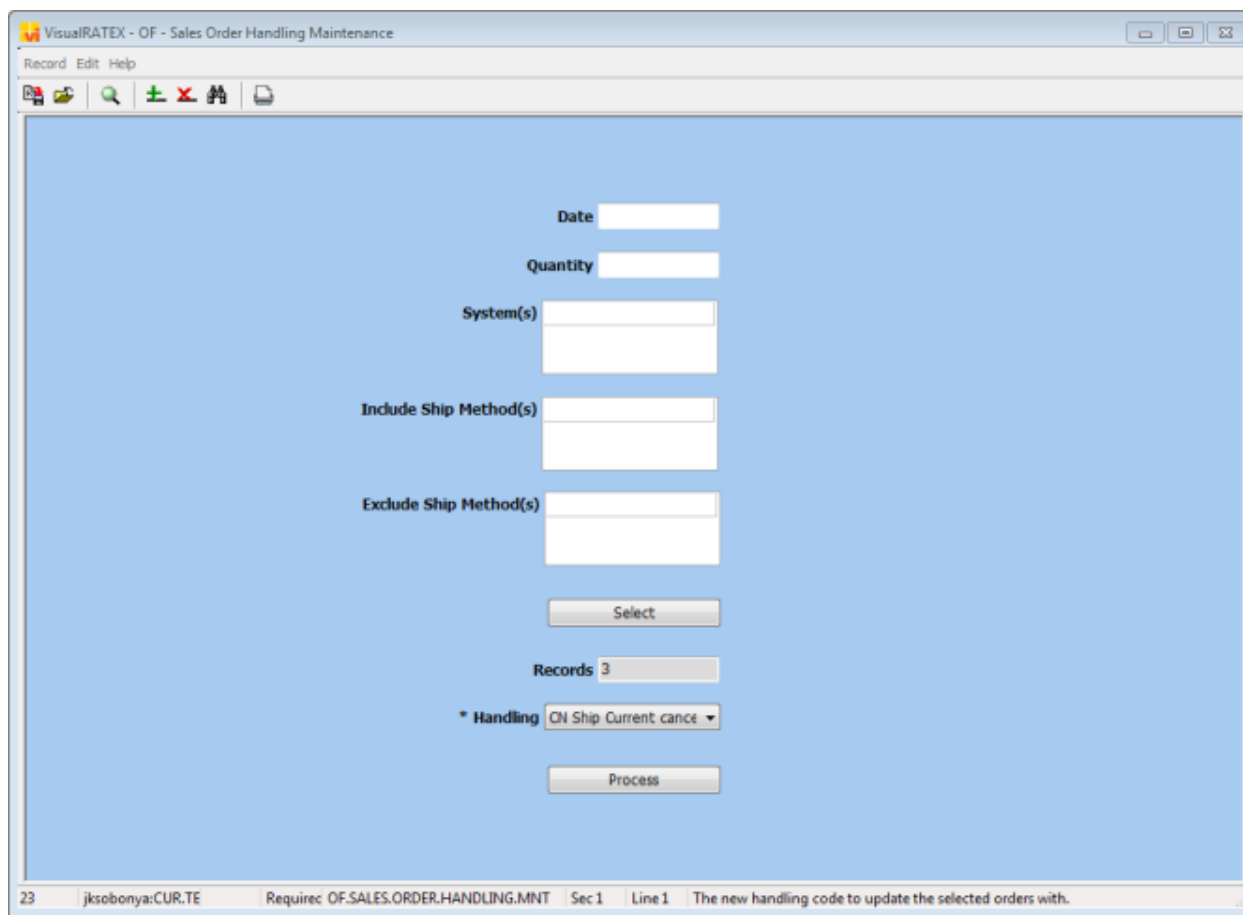
Depending on the time of year, the bookstore may want to process sales orders differently. By default, a handling code is stamped on every sales order as it is created in Order Fulfillment. The handling code choices are described in the previous section, [Handling/Backorder Options](#). The default handling code can be changed



at any time in the [Sales Order Parameter setup](#). If the handling code is changed, all future orders that come into Order Fulfillment will use the new default handling code. Existing sales orders are not updated, unless the Sales Order Handling screen is utilized. The Sales Order Handling screen will update ALL sales orders that are INPR/RDPK with the selected handling code. Any sales orders that have already been picked are not changed.

Tip: Sales Order Handling is new in the 19.1 release of VisualRATEX.

Screen Name: Sales Order Handling  
 Location: Order Fulfillment > Sales Order Handling



*OF.SALES.ORDER.HANDLING.MNT  
 Sales Order Handling screen*

The following fields are optional, and will "filter" any sales orders based on the entered criteria:

- Date** - Enter a date to filter sales orders with a date prior to the date entered.
- Quantity** - Enter a quantity to filter sales orders with the oldest quantity of eligible orders.

**System** - Enter a system flag (GM/TR/TX) to filter sales orders with at least one line with the system flag.

**Include Ship Method(s)** - Enter a shipping method (ex. FEDX) to filter sales orders with only the shipping methods entered. Press F9 to see a list of available shipping methods.

**Exclude Ship Method(s)** - Enter a shipping method (ex. FEDX) to filter sales orders with shipping methods EXCEPT those entered. Press F9 to see a list of available shipping methods.

When finished entering the above criteria, click **Select**. The number of sales orders that will be changed are listed in the **Records** field.

Next, select a **Handling** code from the dropdown. This is required. The selected handling code will be applied to all applicable sales orders.

Click **Process** to update the selected sales orders with the selected handling code. The process will complete and the screen will close automatically. **Proceed to the Pick List Selection screen** to print pick lists for the sales orders.

## PICKING SALES ORDERS

---

Once a sales order is INPR/RDPK, it can be picked and prepared for verification.

**Tip:**

In order to print pick lists, the following template is required:

**PickList.doc**

This template should be placed in your RATEX\_Templates folder.

Additional versions of the Pick List are:

PickList2.doc

PickList3.dotm

The different pick lists are explained in the “Pick List Versions” section below.

Sales orders can be picked in two ways: automatically or manually.

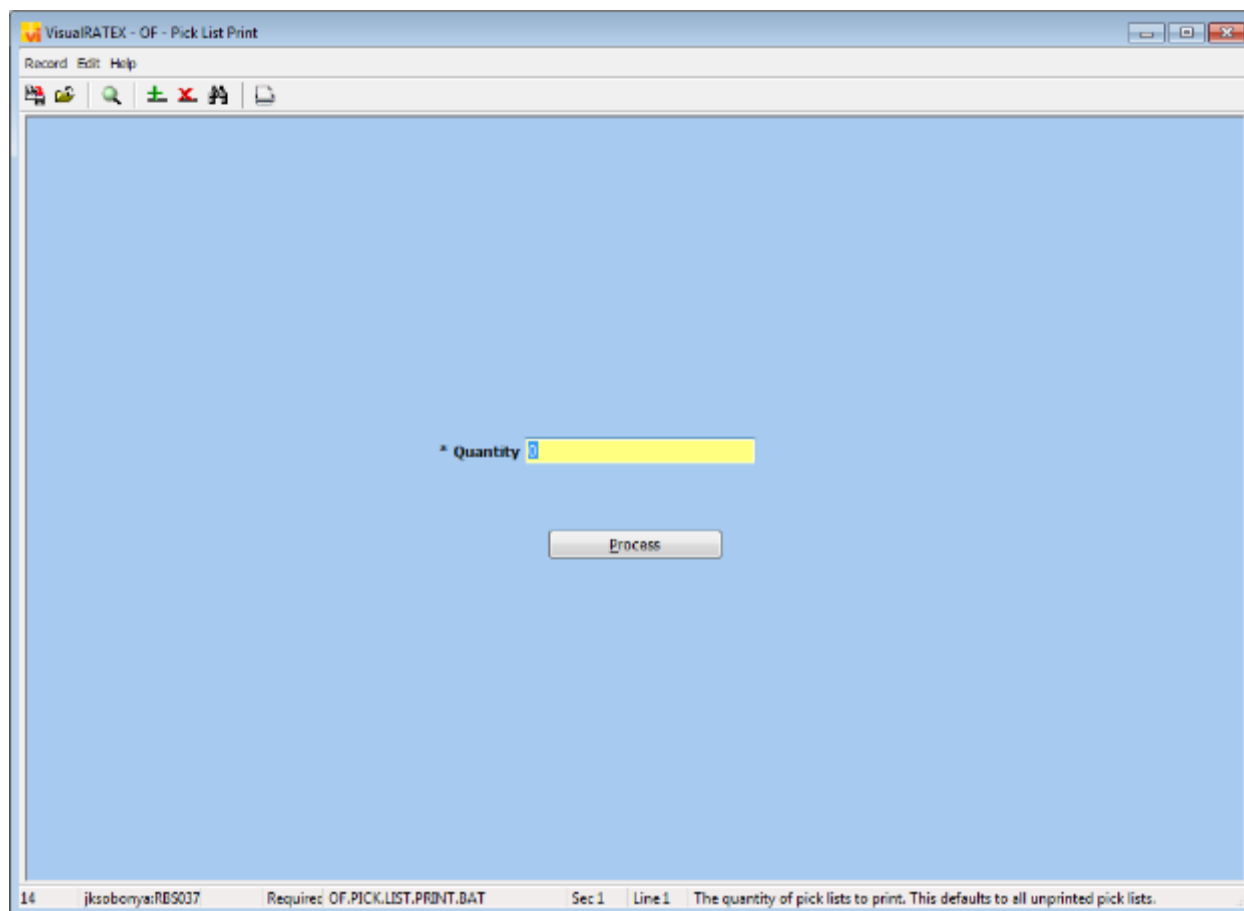
## AUTOMATIC PICKING

---

If the Auto Print Pick List Sales Order parameter set to Y, all qualifying orders with a status of INPR/RDPK will be printed when this screen is accessed.

Screen Name: Pick List Print

Location: Order Fulfillment > Warehouse Management > Utilities > Pick List Print



*OF.PICK.LIST.PRINT.BAT  
Pick List Print screen*

As soon as this screen is accessed, the Quantity of unprinted pick lists will display in the Quantity field. Click Process, or wait a few seconds, and the Pick Lists will print automatically to the default printer assigned to the logged in user record.

## MANUAL PICKING

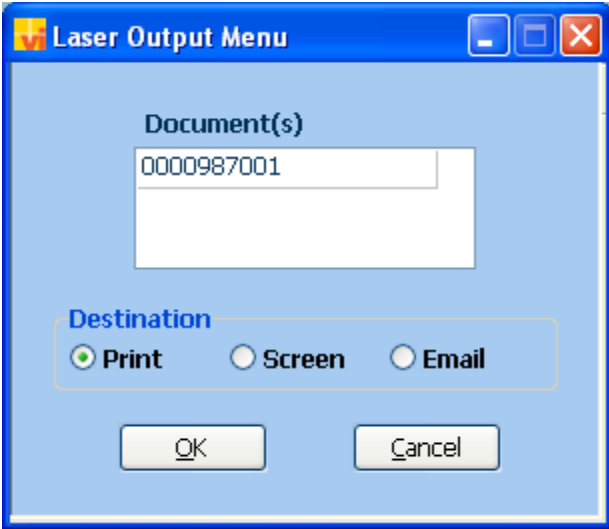
If Automatic Picking is not turned on, pick lists will need to be printed manually. The manual method allows a user to select which pick lists to print based on various criteria.

Screen Name: Pick List Selection

Location: Order Fulfillment > Pick List Selection

OF.PICK.LIST.MNT  
Pick List Selection screen

Most fields on this screen are *optional* and do not need to be filled out. At a minimum, Store, Type, and Warehouse need to be entered. Click the Calculate button to review how many sales orders will have pick lists printed based on the defined criteria. The sales orders that qualify to be picked will be displayed in the Shipment List grid. If necessary, redefine the criteria and click Calculate again to change how many pick lists will be printed. Click the Process button to print the pick lists. The qualifying pick lists will print:

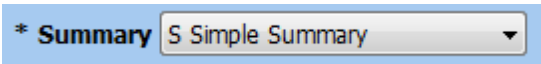


## PICK LIST VERSIONS

Several versions of the pick list are available. Each version is described below.

### ORIGINAL PICK LIST - PICKLIST.DOC

The original pick list is titled PickList.doc . This is the “default” pick list that will print when pick lists are generated. In the Pick List Selection screen, the Summary field tells the picking process which pick list to print:



S – Simple Summary, the default, will print the original pick list, as shown below.

Customer ID: 000000582  
 Customer Name: Sobonya, Jessica  
 Customer Phone: 610-828-8630  
 Customer Email: jksobonya@ratex.com

## Pick Slip

Page 1 of 1

Picked By: \_\_\_\_\_

Sales Order: 1000583	Priority: Normal	Date	Time
Shipment ID: 1000583001	Shipped Via: UPS - Ground	17 OCT 2012	10:18am

Shipment Notes:

Location	Picked	Qty	SKU	Web ID	N/U	Size/Course	Description	Price	Sub
		1	2905393	00056	New	SMALL	ERATEX SWEATSHIRT	39.99	N

*Example Pick List*

One pick list will print per shipment. All items on the shipment will display in the center grid; other information, like the shipment number, shipping method, date, time, and basic customer information is

printed at the top of the pick list. There is also a barcode, which is the shipment number; this can be used during pick list verification to scan the shipment number, instead of manually keying in the shipment number.

If more than one pick list is printed in a batch, a Pick List Summary will print at the end of the run, as shown below.

Customer ID:  
Customer Name:  
Customer Phone:  
Customer Email:

## Pick Slip Summary

Page 1 of 1

Picked By: \_\_\_\_\_

Pick List 001004	Priority: Normal	Date	Time
Total Qty 6	Shipments 5	17 OCT 2012	10:45am

Shipment Notes:

Location	Picked	Qty	SKU	Web ID	N/U	Size/Course	Description	Price	Sub
		1	1228824	10079	N	NO SIZE	RBS HAT	14.95	
		3	1229634	10082	N	SMALL	ERATEX SWEATSHIRT- DK. GRAY	49.95	
		1	1229670	10084	N	NO SIZE	ERATEX PEN - GREEN	1.99	
		1	2900132364521	Text	U	ENG.290	JONES - CALCULUS EARLY TRANSCENDNLT&S SOL&MATHXL PK	141.55	

Example Pick List Summary

The Pick List Summary lists every item on every shipment in the batch, and sums the quantity ordered. The Pick List Summary also displays a Pick List ID number, which is useful if the pick list batch needs to be reprinted (see the Pick List Reprint section).

\* Summary

N – No Summary will print the original pick list as indicated above, but no summary sheet will print.

## CART PICK LIST - PICKLIST2.DOC

A different version of the pick list, called the “Cart Summary Pick List”, is available to use instead of the original pick list:

\* Summary

C – Cart Summary organizes the items differently than the original pick list; instead of printing a pick list for each shipment, all of the item quantities are summed and display in descending order. Other information, like the color, size, and SKU (GM), or author and title (TX/TR), are also displayed. This version of the pick list is designed to make the picking process more efficient by sorting the items that need to be picked by the quantity ordered.

The original pick list will also print, in addition to the cart pick list.

### Batch Pick Summary

Location	Color	Size	SKU	New	Used
	BLACK	MEDIUM	1227872	10	
<b>Manf:</b>		<b>Desc:</b> RBS SWEATSHIRT - BLACK			
<b>Desc (cont):</b>					
<b>New</b>	1 (10)				
<b>New</b>					

Location	Color	Size	SKU	New	Used
	DK. GRAY	LARGE	1229652	1	
<b>Manf:</b>		<b>Desc:</b> ERATEX SWEATSHIRT - DK. GRAY			
<b>Desc (cont):</b>					
<b>New</b>	3				
<b>New</b>					

Example Cart Pick List Summary

### IMAGE PICK LIST - PICKLIST3.DOTM

A different version of the pick list, called the "Image Pick List", is available to use instead of the original pick list or cart summary pick list. This version of the pick list prints a thumbnail image for every item on each shipment, as shown below:

Cust ID: 000001204  
 Name: Sobonya, Jessica  
 Phone: 610-592-4176  
 Email: jksobonya@ratex.com

### Pick Slip Reprint


Page 1 of 1

Picked By: \_\_\_\_\_



Sales Order: 0002161	Priority: Normal	Date	Time
Shipment ID: 0002161003	Shipped Via: FedEx - Home Delivery	17 OCT 2012	01:20pm

Shipment Notes :

Image	Location	Picked	N/U	Size	Sub
	Qty	Sk	WebId	Price	
			New	NO SIZE	
	1	1228824		10079	14.95
	RBS HAT				

Example Image Pick List

The thumbnail images to be used on the image pick list must be defined in a specific directory location, for example, a local directory (C:\) or a network directory (M:\). The entire path, including a slash at the end of the path, must be entered in AV.PARAMETER SALES.ORDER, Data 5, Cell 3, as shown below:

Data 5	
	2
	T
	C:\Users\jks...

AV.PARAMETER SALES.ORDER Data 5, Cell 2 must be a “T” to use the image pick list. If Cell 2 is a “N” or null, the original pick list will be used.

The images must be named SKU.jpg. The reason for this is because you can have different images for each color/size of a particular item. The images will be automatically resized to 100x100 pixels when generated onto the image pick list.

## PICK LIST COMPLETE

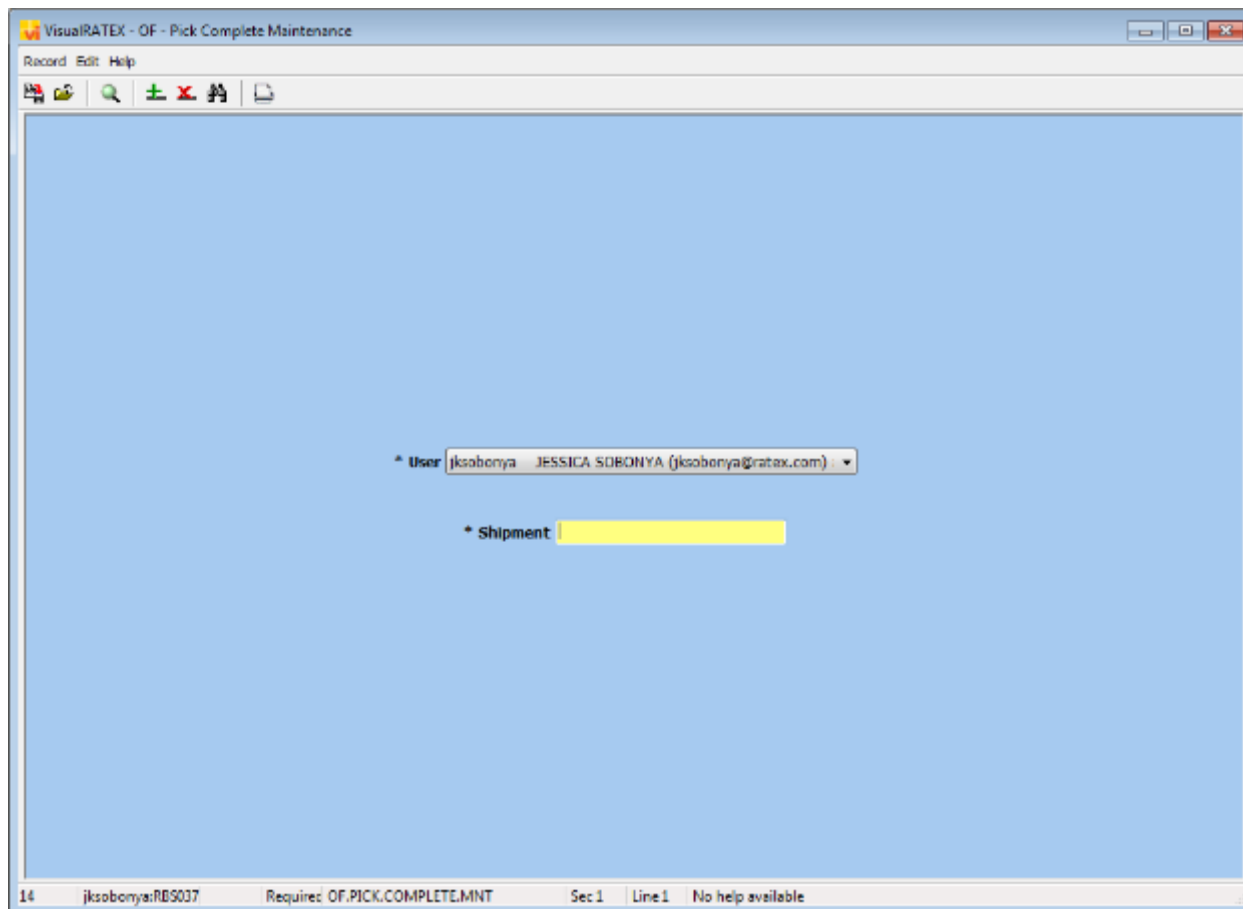
---

An optional step after completing the picking process is to give shipments a line status of “PCKD” instead of “PICK”. This can help identify orders that have been picked and are ready for verification. This process also allows the user to select who picked the order; this user will be automatically populated in the “Picked By” field during Pick List Verification.

Screen Name: Pick List Complete

Location: Order Fulfillment > Pick List Complete





*OF.PICK.COMPLETE.MNT  
Pick List Complete*

Select the user that will be listed as the “Picked By” in Pick List Verification. Enter the shipment number and press F10. When F10 is pressed, the line status of the sales order will change to “PCKD”. During Pick List Verification, the “Picked By” field will be automatically filled in with the user entered here.

## **PICK VERIFYING SALES ORDERS**

Once sales orders have been picked, they can be pick verified, and the packing lists can be printed and prepared for shipment.

Screen Name: Pick List Verification

Location: Order Fulfillment > Pick List Verification

**Tips:**

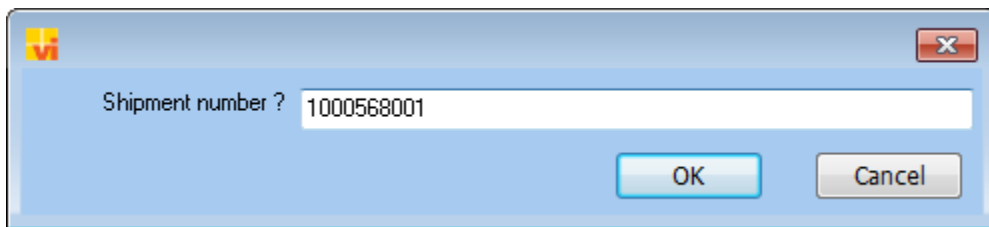
The sales order must have a line status of PICK or PCKD in order to Pick Verify the sales order. If the sales order has not yet been picked, a prompt will display stating that pick verify is not allowed. Go back to the Pick List Selection screen and pick the order.

In order to print packing lists, the following template is required:

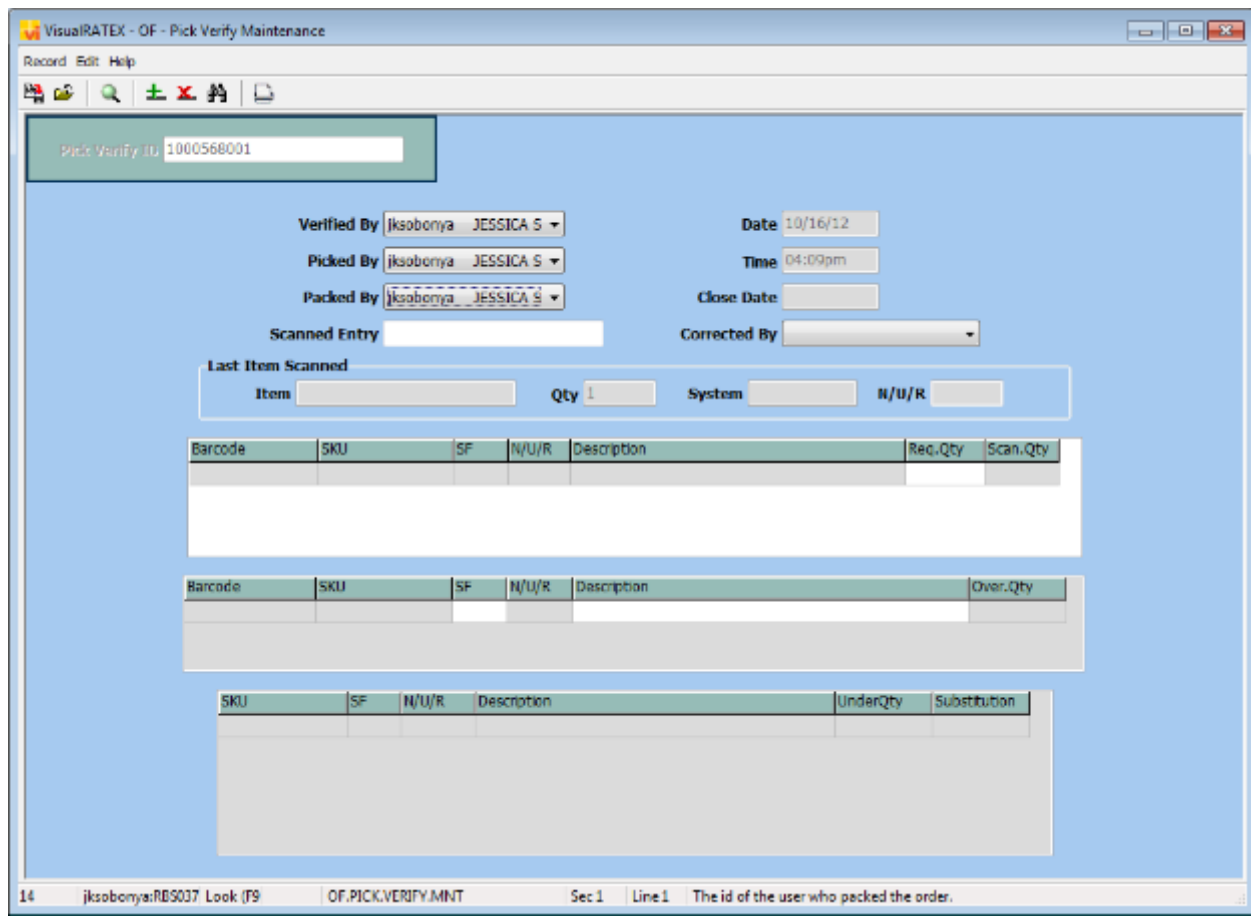
PackingList.doc

This template should be placed in your RATEX\_Templates folder.

When the screen is accessed from the menu, a Shipment Number prompt appears. At the prompt, enter the sales order number + shipping ID and click OK.



The Pick Verify Maintenance screen will appear:



OF.PICK.VERIFY.MNT  
Pick Verify Maintenance screen

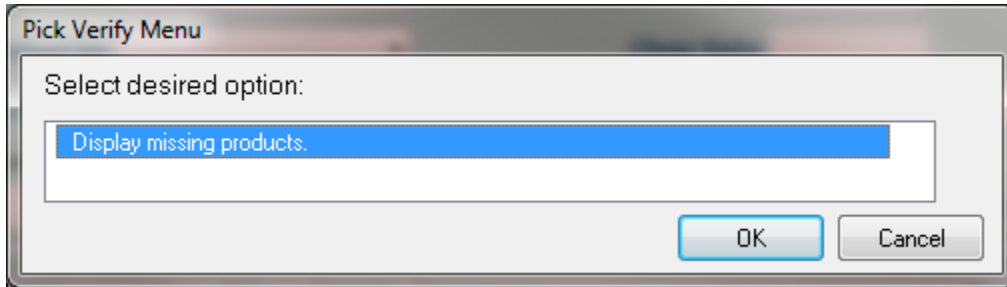
Select the user who picked the order and the user who will pack the order.

In the Scanned Entry field, scan the item to be packed/shipped. When an item is scanned, the Pick List is read by the system to confirm that the item is a part of the sales order. If the item is part of the order, it will be added to the grid in the center of the screen:

Barcode	SKU	SF	N/U	Description	Req.Qty	Scan.Qty
7948950	7948950	GM	N		5	1

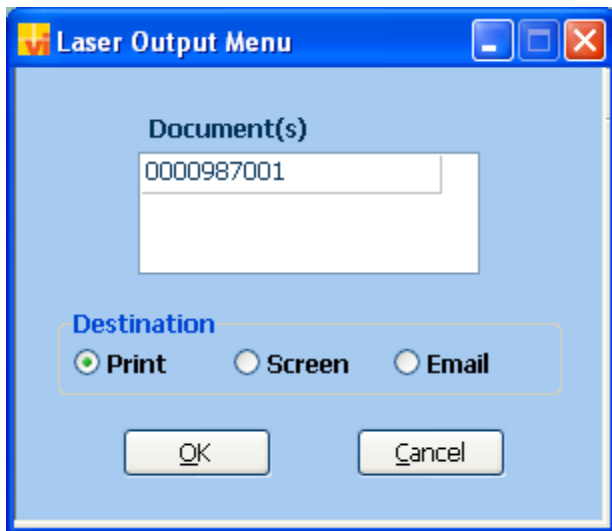
Continue to scan the remaining items on the sales order.

Optional: Press F9 on the Scanned Entry field to display the following prompt:



Display Missing Products will display all items on the pick list that have not been scanned in the first and third grids on the screen.

When finished scanning items, press F10. The packing list will print:



## PACKING LIST VERSIONS

Several versions of the packing list are available. Each version is described below.

### **ORIGINAL PACKING LIST - PACKINGLIST.DOC**

The original packing list is titled PackingList.doc . This is the “default” packing list that will print when packing lists are generated, as shown below:



MEMBER NATIONAL ASSOCIATION OF COLLEGE STORES

RATEX Business Solutions  
 2250 Hickory Road, Suite 10  
 Plymouth Meeting, PA 19462-1047  
 PHONE 800-417-2839  
 FAX 607-255-0083

October 17, 2012

Page 1 of 1

### Packing Slip



Internet Order 110488	Shipment 1000563002	Customer 000000582
Ship Method UPSG	Priority Normal	Email jksobonya@ratex.com

<b>SHIP TO:</b> Jessica Sobonya RBS 2250 Hickory Road Suite 10  Plymouth Meeting, PA 19462 PHONE: 16108288630 FAX:	<b>BILL TO:</b> Jessica Sobonya RBS 2250 Hickory Road Suite 10  Plymouth Meeting, PA 19462 PHONE: 16108288630 FAX:
---	---

Qty	Item No	Description	Price	Amount
1	2903031	RBS SWEATSHIRT BLACK SMALL	49.99	49.99
1	2903148	VisualRATEX Sweatshirt GRAY EXTRA LARGE	39.95	39.95
1	2903157	CAP, GOWN, TASSEL SET BLACK ALL SIZES	14.95	14.95
1	2904145	RBS PEN BLACK NO SIZE	2.00	2.00
1	2903335	RBS Women's Shirt BLACK SMALL	19.99	19.99
			<b>Subtotal:</b>	<b>126.88</b>
Packaging, Handling & Delivery THANK YOU FOR YOUR ORDER!			<b>Sales Tax:</b>	<b>0.14</b>
			<b>TOTAL:</b>	<b>127.02</b>

Example Packing List

The packing list displays the number of items on the shipment, the price each, the amount, the subtotal, shipping, sales tax, order total, as well as the billing and shipping address of the order. The bottom of the packing list displays Ship To and Return To addresses, which can be peeled off and placed on the shipment and return packages.

One packing list prints per shipment.

## BACKORDER PACKING LIST - PACKINGLIST2.DOC

A different version of the packing list, called the "Backorder Packing List", is available to use instead of the original packing list. This packing list is nearly identical to the original packing list; the main difference is this version shows items on subsequent shipments that are backordered, as shown below:

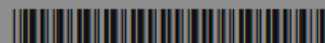


MEMBER NATIONAL ASSOCIATION OF COLLEGE STORES

RATEX Bookstore System  
 2250 Hickory Rd, Suite 10  
 Plymouth Meeting, PA  
 PHONE 800-417-2839  
 FAX 610-828-8632

Page 1 of 1

### Packing Slip



Internet Order 110503	Shipment 1000583001	Customer 000000582
Ship Method UPSG	Priority Normal	10/17/12

<b>SHIP TO:</b> Jessica Sobonya RBS 2250 Hickory Road  Plymouth Meeting, PA 19462 PHONE:16108288630 FAX:	<b>BILL TO:</b> Jessica Sobonya RBS 2250 Hickory Road Suite 10  Plymouth Meeting, PA 19462 PHONE:16108288630 FAX:
---	--

Order Qty	Back Order	Shipped	Item No	Description	Price	Amount
1	0	1	2905393	ERATEX SWEATSHIRT SMALL	39.99	39.99
1	1	0	2902785	VisualRATEX Polo NAVY SMALL	24.99	0.00
					<b>Subtotal:</b>	39.99
					<b>Packaging, Handling &amp; Delivery</b>	8.19
					<b>THANK YOU FOR YOUR ORDER!</b>	<b>Sales Tax:</b> 0.41
					<b>TOTAL:</b>	48.59

Example Backorder Packing List

In the example above, the first item is being shipped; the second item is “backordered” on a separate shipment, and will be shipped separately.

To use the backorder packing list, AV.PARAMETER SALES.ORDER Data 5, Value 1 must be set to a “2”, as shown below:

Data 5
2
N
C:\Users\jks...

If Data 5, Value 1 is a “1”, the original packing list will be used.

### UPS PACKING LIST - UPSPACKINGLIST.DOC

In the 37A .17 release of VisualRATEX, a UPS version of the packing list is available to use instead of the original packing list or backorder packing list. This version of the packing list will print a UPS label in the bottom half of the document, which can be peeled off and placed on the package. This logic requires special

parameter setup; RBS requires the client's UPS credentials to be entered into Order Fulfillment, so Order Fulfillment can communicate with UPS directly to generate a label and tracking number for the shipment during Pick List Verification.

RBS requires the following information:

UPS Information:

Access Key (License Number)

User ID

Password

Shipping Information:

Name

Attention

Phone Number & Extension

Shipper Number (Account Number)

Address

City

State

Zip

Country

Once this information is entered into Order Fulfillment, UPS labels can be generated by turning on a parameter to activate the UPS logic. AV.PARAMETER SALES.ORDER, Data 4, Value 2 must be a "Y" to activate the UPS logic:

Data4	
	N
	Y
	Y

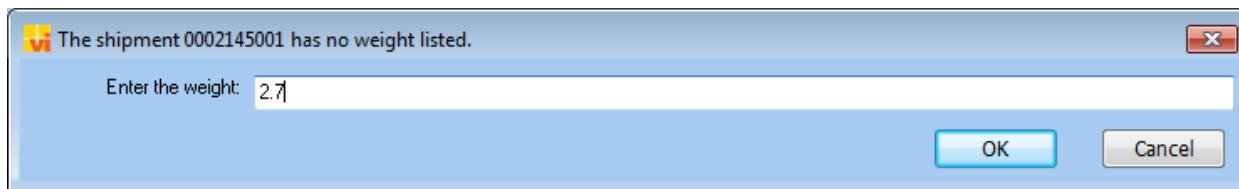
Tip:

In addition to adding the UpsPackingList.doc template to the RATEX\_Templates folder, a pscp.exe file must be added to the template folder as well. This file helps generate the label properly.

### UPS LABEL / TRACKING NUMBER GENERATION

During Pick List Verification, after all items have been scanned, press F10.

In order to generate a correct UPS label, the weight of the items is a requirement. If the weight is not already entered in VisualRATEX for the items, the user will be prompted to add the weight, as shown below:



Once the weight has been entered, several things happen at once.

First, the payment gateway is contacted and the customer's credit card is authorized/charged for the order total. If there is a problem charging the customer's credit card, the process stops and a label is NOT generated. Once the credit card auth/capture has been completed, UPS is contacted, a label is generated and printed to the user's default printer, a tracking number is generated and added to the shipment, the shipment is closed, and an order update e-mail is sent to the customer with the tracking number included.

The integration with UPS saves the Order Fulfillment user time, because they do not have to manually generate labels, tracking numbers, or even close the shipments. The UPS logic takes care of all of this.

Below is an example of what the UPS packing list looks like:





### Packing Slip

Click on Tools to convert PDF documents to Word or Excel.



Sales Order 0002145	Shipment 0002145001	Customer 000000461
Ship Method UPSG	Priority Normal	10/17/12

<b>SHIP TO:</b> Adam Conley 2250 Hickory Rd  Downingtown, PA 19335 PHONE: 6108288630 FAX:	<b>BILL TO:</b> Adam Conley 2250 Hickory Rd  Downingtown, PA 19335 PHONE: 6108288630 FAX:
---	---

Qty	Item No	Description	Price	Amount
1	978073820824	MANAGING TRANSITIONS MAKING	12.75	12.75
	4	THE MOST OF CHANGE		
		Packaging, Handling & Delivery		6.50
		THANK YOU FOR YOUR ORDER!		
		<b>Subtotal:</b>		12.75
		<b>Tax:</b>		1.16
		<b>TOTAL:</b>		20.41

1 OF 1

3 LBS

RATEX BUSINESS SOLUTIONS  
6004172830  
2250 HICKORY ROAD  
FLYMOOUTH MEETING PA 19462

**SHIP TO:**  
ADAM CONLEY  
6108288630  
ADAM CONLEY  
2250 HICKORY RD  
DOWNINGTOWN PA 19335

**PA 193 9-06**

**UPS GROUND**

TRACKING #: 1Z V20 14F 03 9738 5251

**SAMPLE**

XXL 12/09/02    NV50 30.0A 07/2012

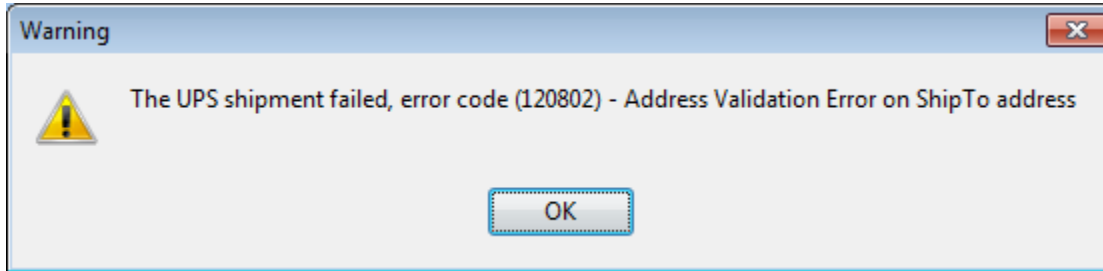
BILLING: P/P

Invoice No.: 0002145001

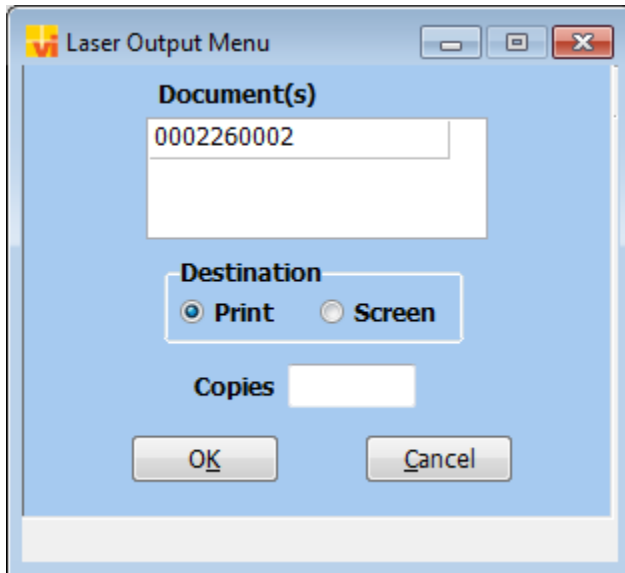
Example UPS Packing List

### ERROR HANDLING

If there is a problem generating a UPS label (address verification issue, credit card decline, etc.), a warning message will display on the screen describing the nature of the problem:



When the UPS label fails to print, the regular packing list will generate instead, which the user can print to the printer or the screen:



When the regular packing list prints, the sales order status is INPR/RDSH. The user has three choices on how to finish processing the sales order, depending on the nature of the problem:

1. Close the shipment in Shipment Maintenance.
2. Cancel the shipment in Shipment Maintenance.
3. Create a new shipment, process the new shipment, and cancel the previous shipment.

If you are interested in using the UPS packing list with Order Fulfillment, please contact RBS.

## **FEDEX PACKING LIST - FEDEXPACKINGLIST.DOTM**

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In the 37A .18 release of VisualRATEX, a FedEx version of the packing list is available to use instead of the original packing list, backorder packing list, or UPS packing list. This version of the packing list will print a FedEx label in the bottom half of the document, which can be peeled off and placed on the package. This logic **requires special parameter setup; RBS requires the client's FedEx credentials** to be entered into Order Fulfillment, so Order Fulfillment can communicate with FedEx directly to generate a label and tracking number for the shipment during Pick List Verification.

RBS requires the following information:

FedEx Information:

Access Key (License Number)

Meter Number

User ID

Password

Shipping Information:

Name

Attention

Phone Number & Extension

Shipper Number (Account Number)

Address

City

State

Zip

Country

Once this information is entered into Order Fulfillment, FedEx labels can be generated by turning on a **parameter to activate the FedEx logic**. AV.PARAMETER SALES.ORDER, Data 4, Value 3 must be a "Y" to activate the FedEx logic:

Data4
N
Y
Y

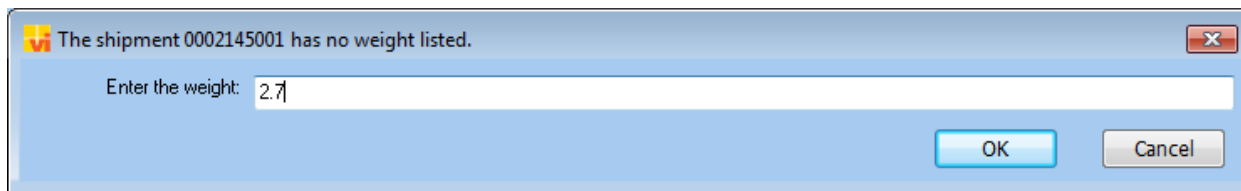
Tip:

In addition to adding the FEDEXPackingList.dotm template to the RATEX\_Templates folder, a pscp.exe file must be added to the template folder as well. This file helps generate the label properly.

**FEDEX LABEL / TRACKING NUMBER GENERATION**

During Pick List Verification, after all items have been scanned, press F10.

In order to generate a correct FedEx label, the weight of the items is a requirement. If the weight is not already entered in VisualRATEX for the items, the user will be prompted to add the weight, as shown below:



Once the weight has been entered, several things happen at once.

First, the payment gateway is contacted and the customer’s credit card is authorized/charged for the order total. If there is a problem charging the customer’s credit card, the process stops and a label is NOT generated. Once the credit card auth/capture has been completed, FedEx is contacted, a label is generated and printed to the user’s default printer, a tracking number is generated and added to the shipment, the shipment is closed, and an order update e-mail is sent to the customer with the tracking number included.

The integration with FedEx saves the Order Fulfillment user time, because they do not have to manually generate labels, tracking numbers, or even close the shipments. The FedEx logic takes care of all of this.

Below is an example of what the FedEx packing list looks like:



Packing Slip



Sales Order 0002146	Shipment 0002146001	Customer 000001580
Ship Method FEDX2	Priority Normal	10/17/12

<b>SHIP TO:</b> Jessica Sobonya 2250 Hickory Road Suite 10  Plymouth Meeting, PA 19462 PHONE:16108288630 FAX:	<b>BILL TO:</b> Jessica Sobonya 2250 Hickory Road Suite 10  Plymouth Meeting, PA 19462 PHONE:16108288630 FAX:
--	--

Qty	Item No	Description	Price	Amount
1	97801336951	MILLER LEVINE BIOLOGY 2010	68.50	68.50
	0	ON-LEVEL STUDENT EDITION (NATL)		
		Packaging, Handling & Delivery		
		THANK YOU FOR YOUR ORDER!		
		Subtotal:		68.50
		Tax:		15.00
		TOTAL:		88.51

ORIGIN: QFWA (800) 417-2839  
 RATEX BUSINESS SOLUTIONS  
 2250 HICKORY ROAD, SUITE 10  
 PLYMOUTH MEETING, PA 19462  
 UNITED STATES US

SHIP DATE: 10OCT12  
 ACTWGT: 1.5 LB  
 CAD: 116160114WMSX0200  
 BILL SENDER

97801336951

TO

**JESSICA SOBONYA**  
**2250 HICKORY ROAD**  
**\*\*TEST LABEL - DO NOT SHIP\*\***  
**PLYMOUTH MEETING PA 19462**

16108288630 DEF  
 FAX 0002146001 PO

FRI - 19 OCT A1  
 \*\* 2DAY \*\*  
 RES  
 19462  
 PA-US PHL

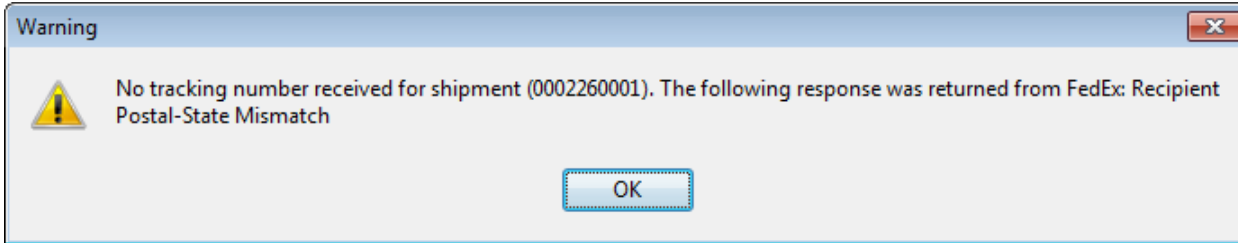
TRK 7948 0379 7028  
 (020)

**1C QFWA**

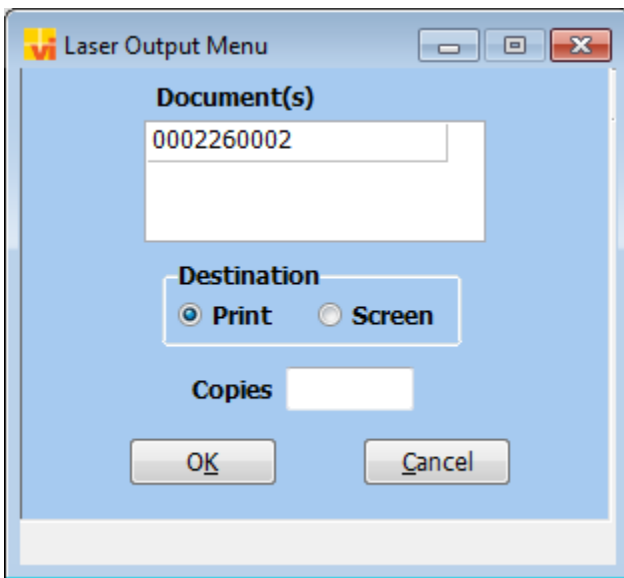
Example FedEx Packing List

**ERROR HANDLING**

If there is a problem generating a FedEx label (address verification issue, credit card decline, etc.), a warning message will display on the screen describing the nature of the problem:



When the FedEx label fails to print, the regular packing list will print instead, which the user can print to the printer or the screen:



When the regular packing list prints, the sales order status is INPR/RDSH. The user has three choices on how to finish processing the sales order, depending on the nature of the problem:

1. Close the shipment in Shipment Maintenance.
2. Cancel the shipment in Shipment Maintenance.
3. Create a new shipment, process the new shipment, and cancel the previous shipment.

If you are interested in using the FedEx packing list with Order Fulfillment, please contact RBS.

## SHIPPING/CLOSING SALES ORDERS

Once sales orders have been prepared for shipment in the Pick Verification screen, they can be closed. If the sales order is being tracked, tracking information can be entered during this step.

Tip:

If using the UPS/FedEx integration described above, this step is completed automatically.

Screen Name: Shipment

Location: Order Fulfillment > Shipment

*OF.SHIPMENT.MNT  
Shipment Maintenance screen*

Enter the sales order number + shipping ID in the Shipment ID field and press Enter:

\* Shipment ID

Enter today's date in the Closed Date field. (If a date other than today's date is entered, you will be prompted to enter today's date). If the sales order is being tracked, enter tracking details in the Tracking grid in the bottom half of the screen. When finished entering the information, press F10 to save the record. Upon pressing F10, the sales order will close and payment will be settled through the CyberSource Business Center. (See the [Authorizations and Settlements section](#) for additional information regarding authorizations and settlements with CyberSource and the [Declines/Resolutions](#) section regarding how to process declined sales orders.)

The sales order status will change to CLSD (Closed).

## MULTI-STORE FULFILLMENT / SALES ORDER PROCESS FLOW

Fulfilling sales orders from multiple stores presents a higher level of complexity to the sales order process flow. In general, the process is the same: sales orders are picked, pick verified, and shipped. Some explanation is needed regarding how the “store” ( and “warehouse”) gets assigned to shipments, and how shipments may require a transfer or split shipment to fulfill the order.

### STORE VS. WAREHOUSE

Each sales order is assigned a store and at least one warehouse. The “store” is the web store, i.e. the store that eRATEX is integrated with in Web Store Maintenance, as shown below:

\* Web Store

\* Description

\* URL

Web Store Maintenance screen – Store 1

VisualRATEX - OF - Sales Order Overview

Record Edit Help

Order #	Internet Order	Name	Customer ID	Order Date	Days Pend	Qty	Lines	Store	O/C	Retail	Status	Pick
1000507	110429	JESSICA SOBONYA	000000582	07/09/12	99	6	6	1	0	25.74	INPR	
1000546	110470	JESSICA SOBONYA	000000582	09/13/12	33	2	2	1	0	173.39	INPR	
1000551	110475	JESSICA SOBONYA	000000582	09/18/12	28	3	3	1	0	44.99	INPR	
1000553	110478	JESSICA SOBONYA	000000582	09/20/12	26	10	2	1	0	9.90	INPR	
1000563	110488	JESSICA SOBONYA	000000582	09/27/12	19	1	1	1	0	46.17	INPR	
1000565	110490	JESSICA SOBONYA	000000582	09/27/12	19	3	3	1	0	98.53	INPR	
1000568	110493	JERE WARNER	000000158	09/27/12	19	1	1	1	0	46.17	INPR	
1000569	110494	JESSICA SOBONYA	000000582	09/27/12	19	8	7	1	0	138.91	INPR	

Item #

Customer ID

Order #

Store



Sales Order Overview screen

The web store is automatically assigned to every sales order. This is NOT necessarily the store that will fulfill the items on the order. The store that will fulfill the items on the order is called the “warehouse”, as shown below:

The screenshot shows the VisualRATEX - OF - Sales Order Maintenance interface. At the top, there is a menu bar with 'Record Edit Help' and a toolbar. Below that, a summary table shows: Product 37.49, Discount 12.50, Freight 8.19, Sales tax 0.49, GST 0.00, and Total 46.17. The main form is divided into several sections: 'Order Information' (Key Code: NONE, Store: RATEX UNIVERSITY B, Status: INPR), 'Customer Information' (Name: Jessica Sobonya, Address: 2250 Hickory Road, City: Plymouth Meeting, State: PA, Zip: 19462), 'Product Information' (Ship Via: UPSG UPS - Ground, Freight: 8.19, Req Date: 10/04/12, Arv Date: 10/06/12), and 'Payment Information' (Warehouse: RATEX UNIVERSE, Ship Tax Locality: PA, Tax Status: T). A status bar at the bottom indicates '14 jksobonya:RBS037 Look (F9) OF.SALES.ORDER.MNT Sec 1 Line 1 The "primary" key code to be used on this order. This key code has two functions:ü ...

OF.SALES.ORDER.MNT  
Sales Order Maintenance screen

Prior to 37A .18 (or for those who have multiple eRATEX web sites), the “store” and the “warehouse” shared a 1-to-1 relationship. If the store was 1, the warehouse was 1, no exceptions.

The multi-store logic in 37A .18 changes this dynamic. The warehouse can potentially be any store in the fulfillment priority list (for information on how to set up fulfillment priority lists, see previous section), depending on the fulfillment preferences that were selected by module.

The warehouse is assigned based on the fulfillment preference of “transfers” or “split shipments”. Each preference is described below.

## TRANSFERS & WAREHOUSE ASSIGNMENT

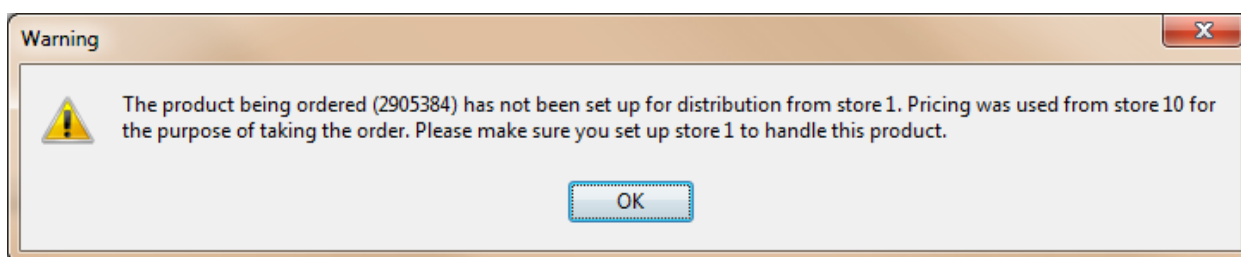
If the fulfillment preference is “transfers”, the warehouse will ALWAYS be the eRATEX integration store (sometimes called the “web store”), which is also the first store in the fulfillment priority list by default. There are no exceptions to this logic. Therefore, at a minimum, all web products should exist in the eRATEX integration store. When a sales order comes into Order Fulfillment, inventory is evaluated for all items on the sales order. If an item does not have inventory in the eRATEX integration store, the first store in the fulfillment priority store list is checked for adequate inventory; if adequate inventory is not found in the first store, the second store is checked, and so on, until sufficient inventory is found. When inventory is found, a pending transfer is created to transfer inventory from the subsequent fulfillment priority store to the eRATEX integration store. Once the transfer process has been completed (i.e. the transfer has been RECEIVED), the shipment will be updated and will be pickable.

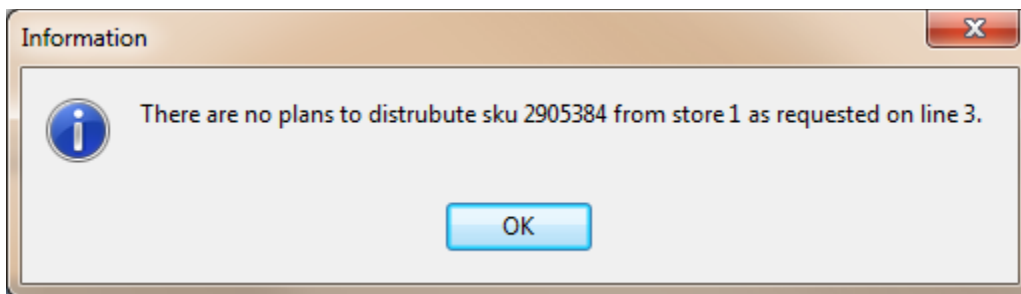
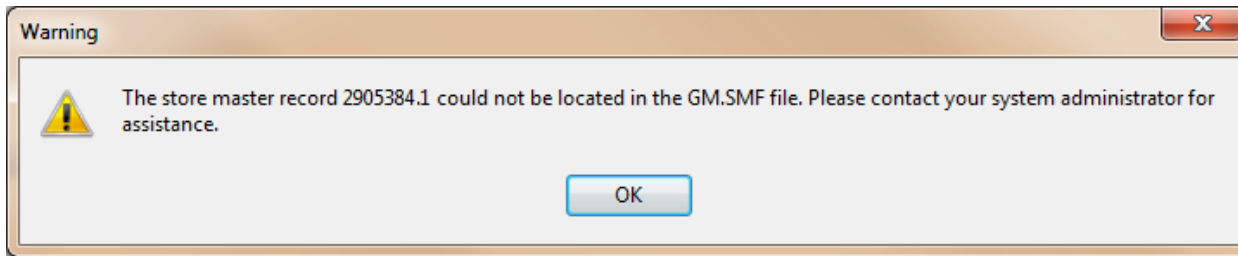
If an item has no inventory in any fulfillment priority stores, meaning no inventory can be transferred to the eRATEX integration store, the shipment will not be pickable.

### How is the Pending Transfer Created?

A program called AVPR.OF.TRANSFER.CREATE runs “behind the scenes” to create the transfer record. The transfer is created with a “Requested Quantity” of the quantity needed to fulfill the order. A comment of “Auto transferred by order fulfillment” will display in the “Comment” field as an indication that this transfer was created by Order Fulfillment.

If an item on eRATEX does not exist in the eRATEX integration store, or if an item is added to an open sales order that does not exist in the eRATEX integration store, warning messages will display on the screen letting the user know that the product does not exist in the store. In the test case below, a store 10 only item was added to an order where store 1 is the first fulfillment priority store and the fulfillment preference is “transfers”:





These messages tell the user that the product is not set up in store 1, the first fulfillment priority store. The item will not be able to be processed until the product is added to store 1.

If the bookstore has items that only exist in one store (and not across stores), consider using the Split Shipments fulfillment preference, described in the next section.

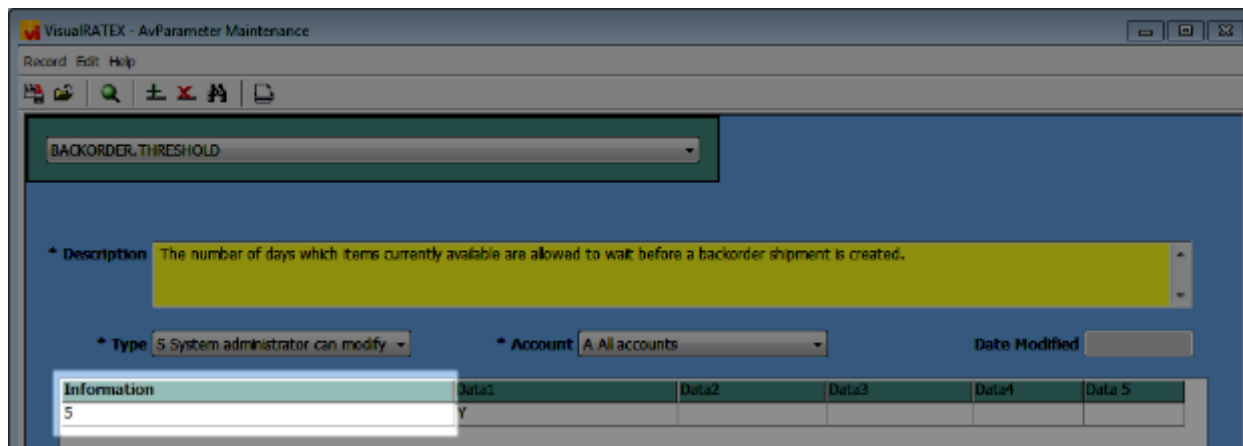
## **BACKORDERS AND TRANSFERS**

If the order handling allows for backorders (“CB”), it is possible that the out of stock item that is waiting on a pending transfer to be fulfilled will be backordered, i.e., placed on a separate shipment. This will occur because any items that are out of stock are put onto separate shipments when a sales order is downloaded to Order Fulfillment and the order handling is “CB”.

If you do not want the sales order to split ship out of stock items that are waiting on a transfer, set the “wait days” threshold in AV.PARAMETER BACKORDER.THRESHOLD.

This parameter is accessed at the following VisualRATEX menu path: Admin > Parameters > AvParameter. Select BACKORDER.THRESHOLD from the dropdown.

The number of days is entered in the “Information” column in the screen, as shown below:



AV.PARAMETER.MNT  
AvParameter Maintenance screen, BACKORDER.THRESHOLD

For example, if the number of days is 5, a backorder/split shipment for out of stock items will not be created for 5 days. This allows adequate time for the pending transfer to be fulfilled.

## SPLIT SHIPMENTS & WAREHOUSE ASSIGNMENT

If the fulfillment preference is “split shipments,” the warehouse on the sales order will be determined by the inventory in each of the fulfillment priority stores. If all items have adequate inventory in the first fulfillment priority store, all items will be on shipment 001. If an item does not have inventory in the first fulfillment priority store but has inventory in the second fulfillment priority store, that item will be placed *on a separate shipment* to be fulfilled by the second fulfillment priority store. If there is no inventory in the second fulfillment priority store, the third fulfillment priority store is checked, and so on, until adequate inventory is found in a subsequent fulfillment priority store. If there is no inventory in any stores, the item will be placed on a separate shipment, with the warehouse being the first fulfillment priority store; the shipment will not be pickable. If a customer orders an item quantity that exceeds the available inventory in the first fulfillment priority store (ex. customer orders 25 pens and only 5 are on hand in the first fulfillment priority store), the subsequent stores are checked; if a subsequent store has available inventory to cover the entire quantity (ex. 25), that store will be used to fulfill the order.

VisualRATEX - OF - Sales Order Maintenance

Record Edit Help

\* Sales Order ID 0002165

Product	Discount	Freight	Sales tax	GST	Total
524.49	0.00	6.50	0.00	0.00	530.99

Order Information Customer Information Product Information Payment Information Comments/Special Instructions

Key Code	Product	Description	Color	Style	Size	Qty	Shippable?	Expected	Shipment	Price Each	Stat	Line Comment	Pe
NONE	10082	ERATEX SWEATSHIRT	021		S	10	10	10/16/12	001	49.95	RDPK		
NONE	9780321474049	KELBY SCOTT / DIGITAL PHO...				1			002	24.99	XUTL		
NONE	9780321523600	KELBY SCOTT / DIGITAL PHO...				1			002	24.99	RDPK		

Shipment Information

Shipment: 0002165001 Shipped on: Phone: 13024771481

Name: Jessica Sobonya Gift Msg: Freight Reason Code: FB Fulfillment Backorde

Search Name: Sobonya Freight Flag: M Manual calculation of

Address: 203 S Booth Dr. \* Ship Via: FEDX FEDX - Ground Priority: N Normal

City: New Castle Freight: 6.50 Req Date: \* Warehouse: 1 RATEX UNIVERS

State: DE DELAWARE Zip: 19720 Frt Tax: 0.00 Schd Date: 10/16/12 Ship Tax Locality: DE

Frt GST: Arv Date: 10/23/12 Tax Status: T

28 | jksobonya:CUR.TE Look (F9) | OF.SALES.ORDER.MNT | Sec 4 | Line 1 | The key code relating to the current line. If (Enter) is pressed on the first line of the c...

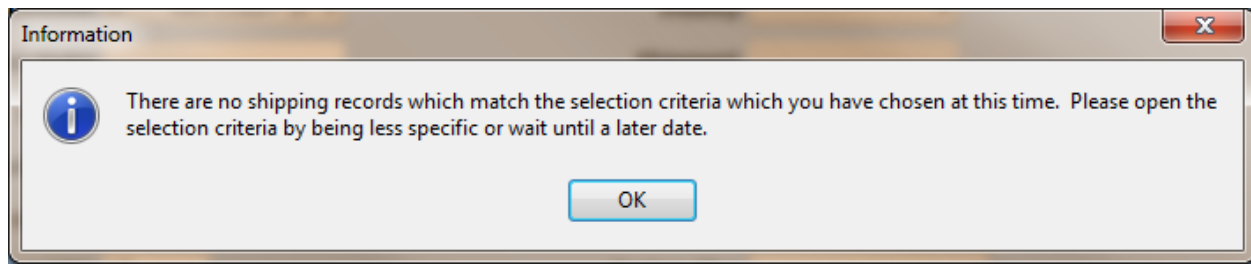
OF.SALES.ORDER.MNT  
Sales Order Maintenance screen

In the above example, a customer ordered 10 sweatshirts. Store 10 is the first fulfillment priority store, but store 10 only has 4 sweatshirts on hand. Store 1 has 96 sweatshirts on hand, therefore, store 1 is being used to fulfill the 10 sweatshirts on the order.

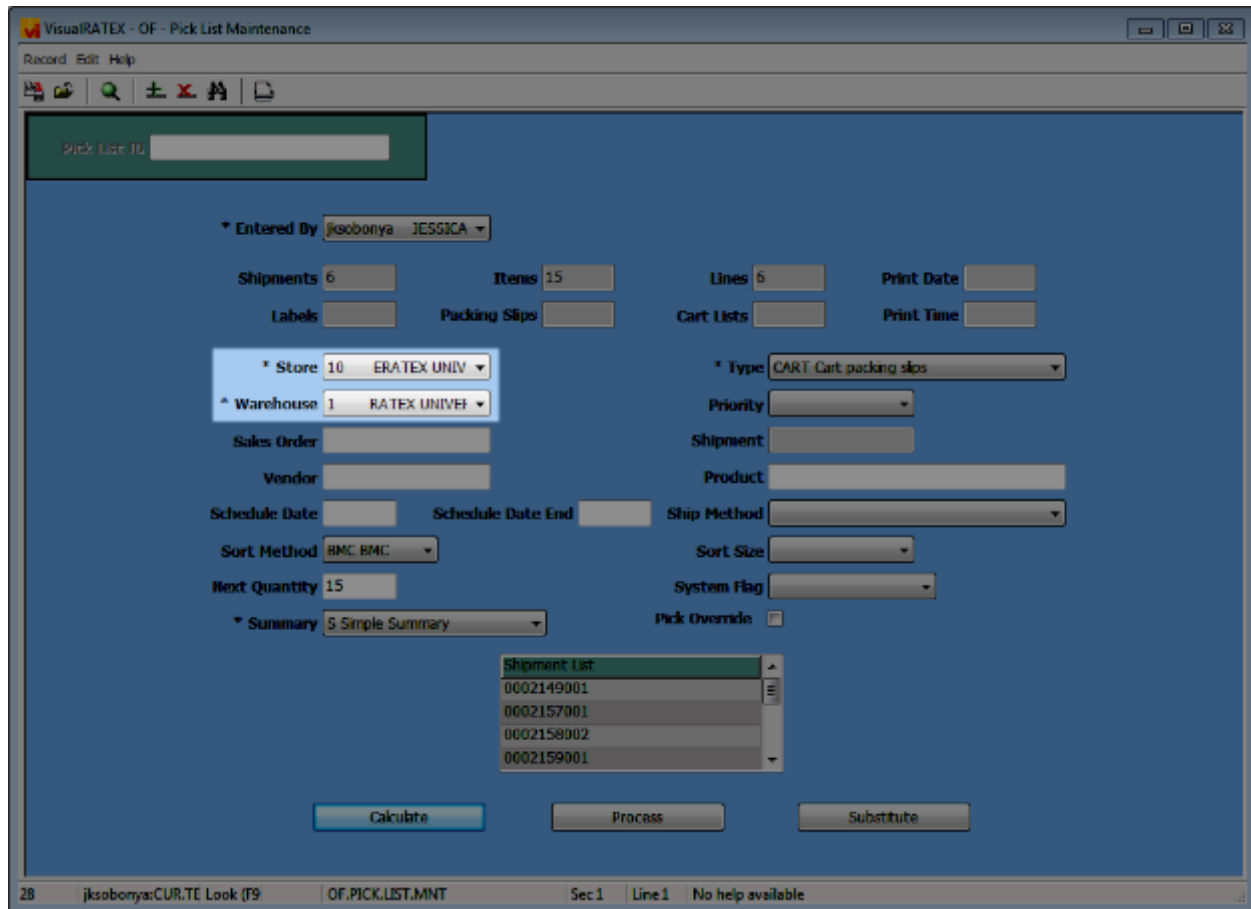
## PICKING MULTI-STORE SHIPMENTS

When picking sales orders, the store and the warehouse must be properly selected in the Pick List Selection screen to ensure that the correct sales orders will be picked for the correct warehouse. The “Store” is always the web store; the “Warehouse” is the warehouse on the sales order shipments; the “Warehouse” is the store where the inventory is decremented.

If the incorrect store or warehouse is selected in the screen, the following prompt may appear:



This message is saying that there are no shipping records that match the selection criteria (i.e. the selected store and warehouse). Make sure that the correct store and warehouse are selected in the screen, and pick lists will print normally.



*OF.PICK.LIST.MNT  
Pick List Selection*

Once the picking process is complete, inventory is decremented for the appropriate items in the appropriate stores, and the rest of the sales order process flow is normal.

## AUTHORIZATIONS AND SETTLEMENTS

When sales orders are processed through eRATEX/Order Fulfillment, payment is processed through a payment gateway like the CyberSource Business Center. Prior to going live with eRATEX, each client sets up a live account with a payment gateway to process credit card transactions. Credit card information, authorizations, and settlements are processed entirely through the the payment gateway. Credit card information is not stored in VisualRATEX or eRATEX.

There are two methods used to authorize and settle credit card payments.

### **AUTH/SETTLE METHOD 1 – FULL AUTHS (WC)**

---

The default logic in eRATEX/Order Fulfillment is for credit card transactions to be processed using the “WC” payment type & tender. When a web order is placed, the customer’s credit card is authorized for the entire order amount. Any changes, additional shipments, etc. requires an additional authorization for the difference in payment. When a sales order is closed, the customer’s credit card is charged/settled for the shipment total.

While this method is the standard auth/settle logic used by many companies throughout the world, the college bookstore industry presents its own set of unique challenges that makes a full authorization at the time the order is placed difficult to handle, especially when textbooks, substitutions, and additional shipments are involved.

A second method, explained below, has been developed to handle authorizations differently.

### **AUTH/SETTLE METHOD 2 – PARTIAL AUTHS (WB)**

---

This method authorizes the customer’s credit card for a small, configurable amount when the web order is placed. The auth is placed only to validate the customer’s credit card, and can be immediately reversed. The sales order will have a payment type of “WB” in Order Fulfillment, instead of “WC.”

A full authorization and settlement will occur when the sales order is closed in Order Fulfillment.

### **PARAMETER SETUP**

---

To implement Auth/Settle Method 2, a few parameters must be set up in the eRATEX Admin. They are:

- Partial Auth – Enabled
- Partial Auth – Amount
- Partial Auth – Message
- Partial Auth – Disable Auto Reversal

These parameters are located in the eRATEX Admin under Configuration > Run Config Wizard. Go to the Payment Methods Accepted section, and click “Configure” next to Credit Card:

*Payment Methods Accepted:		
<input checked="" type="checkbox"/> Credit Card		<a href="#">configure</a>
<input checked="" type="checkbox"/> AR Charge		<a href="#">configure</a>
<input checked="" type="checkbox"/> Student / Campus Card		<a href="#">configure</a>
<input checked="" type="checkbox"/> Department Charge		<a href="#">configure</a>

The following screen will display:

Partial Auth - Enabled must be set to true to implement the logic.

Partial Auth - Amount is the amount which the customer will be initially authorized. It can be any amount except 0.00. RBS recommends an amount between .01 - \$1.00.

Partial Auth - Message is the message that will display on the customer checkout page when the customer is entering their credit card information.

Partial Auth – Disable Auto Reversal controls whether or not to automatically reverse the partial auth amount on the customer’s credit card. Yes will automatically reverse the amount, and no will not.



Payment Details	
Total Amount	\$ 0.01
Description	Your card is only being validated at this time. Your order total is \$77.82
All fields in bold are required.	
Credit Card	
Credit Card Type	<input type="text"/> ▼
Credit Card Number	<input type="text"/>
Expiration Date	<input type="text"/> ▼ <input type="text"/> ▼

eRATEX

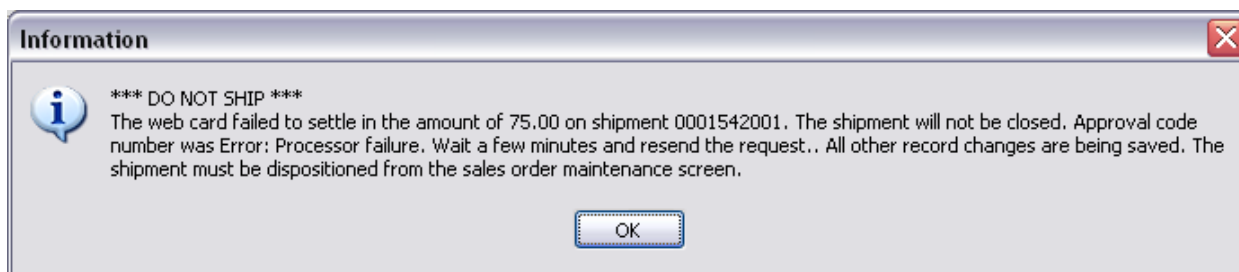
Partial Auth amount and message seen during checkout

## ORDER PROCESSING

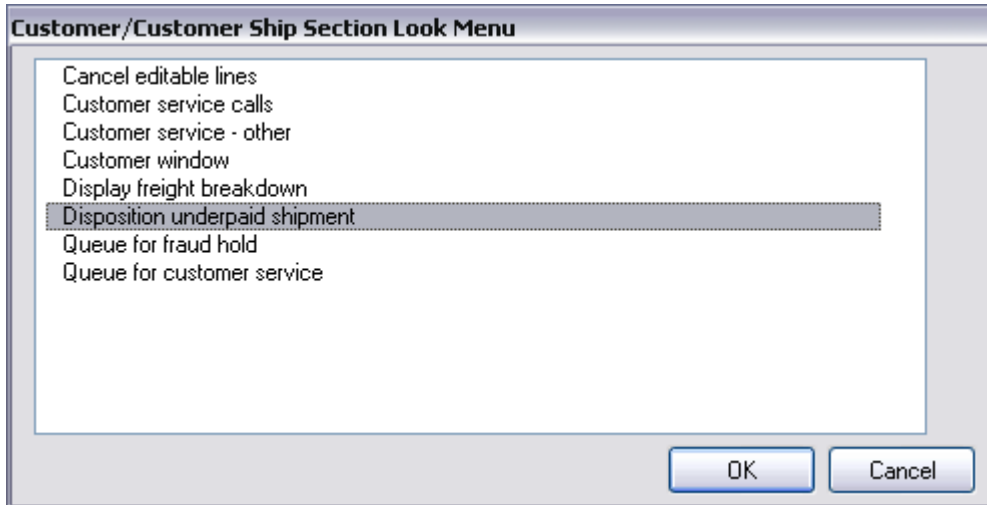
When the web order is downloaded to Order Fulfillment, it is processed like any other sales order (see the Sales Order Processing section above). Any changes requiring a payment increase are added to the order total, but the customer is NOT authorized for them. The sales order will be authorized for the full amount of the shipment, and settled, when the shipment is closed in Shipment Maintenance.

## DECLINES & RESOLUTIONS

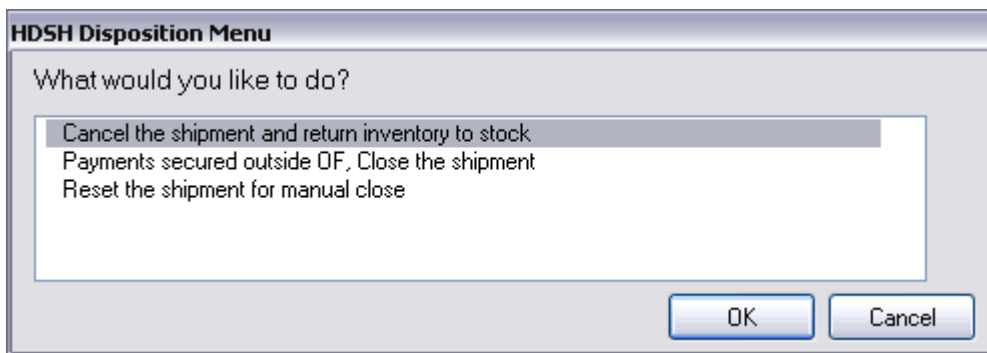
It is possible that a sales order will fail to authorize and/or settle for the order total when it tries to close in Shipment Maintenance. There are a number of reasons why an order could fail to auth or settle. ([Review the CyberSource documentation](#) for a list of Reason Codes that describe various auth, settlement, and processing failures.) If a sales order declines, a message similar to the below screen capture will display in Shipment Maintenance. The message will explain why the failure occurred. The sales order and line statuses will change from INPR/RDSH (In Process/Ready To Ship) to HCSD/HDSH (Hold Credit Shipment Decline/Hold Decline Ship).



Depending on the failure, there are several options to fix the order. In Sales Order Overview, open the Sales Order and press F9. Select “Disposition Underpaid Shipment”:



Select this option and click OK. Three options will display:



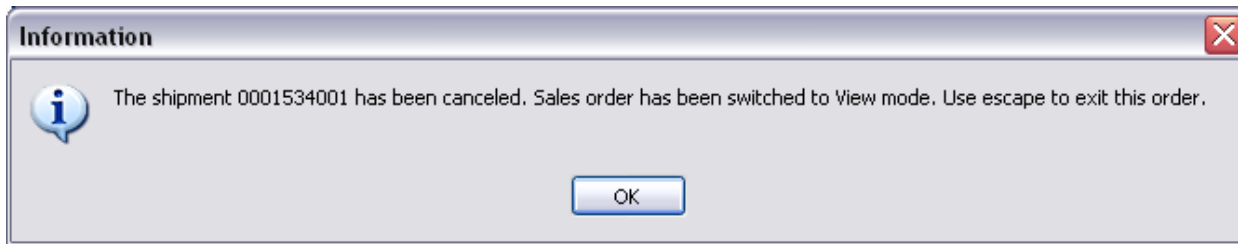
Select the option that best describes how to process the sales order:

To attempt to auth/settle the shipment again, select “Reset the shipment for manual close” and click OK. The following prompt will display:



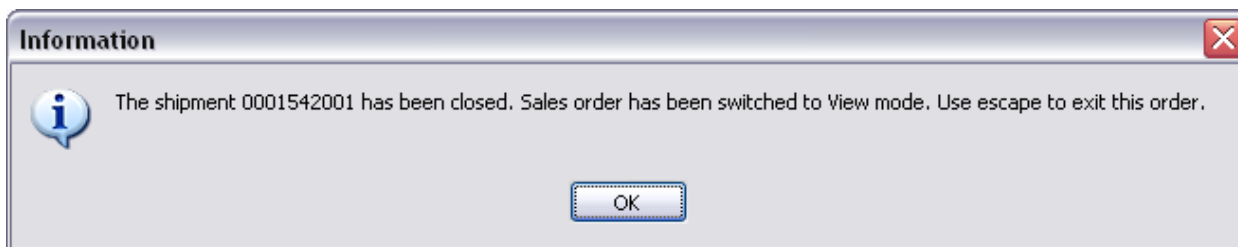
Click OK. The sales order will be saved and the sales order/line statuses will change back to INPR/RDSH. Close the sales order again in Shipment Maintenance.

To cancel the shipment, select “Cancel the shipment and return inventory to stock” and click OK. The following prompt will display:



Click OK. The sales order has been canceled.

If payment was secured outside of Order Fulfillment and the sales order needs to be closed, select “Payments secured outside of OF, close the shipment” and click OK. The following prompt will display:



Click OK. The sales order has been closed.

## SALES ORDER MANAGEMENT

A sales order may need modifications as it progresses through the sales order process flow. Below are some common scenarios that a University bookstore may need to address while taking a sales order through the process flow.

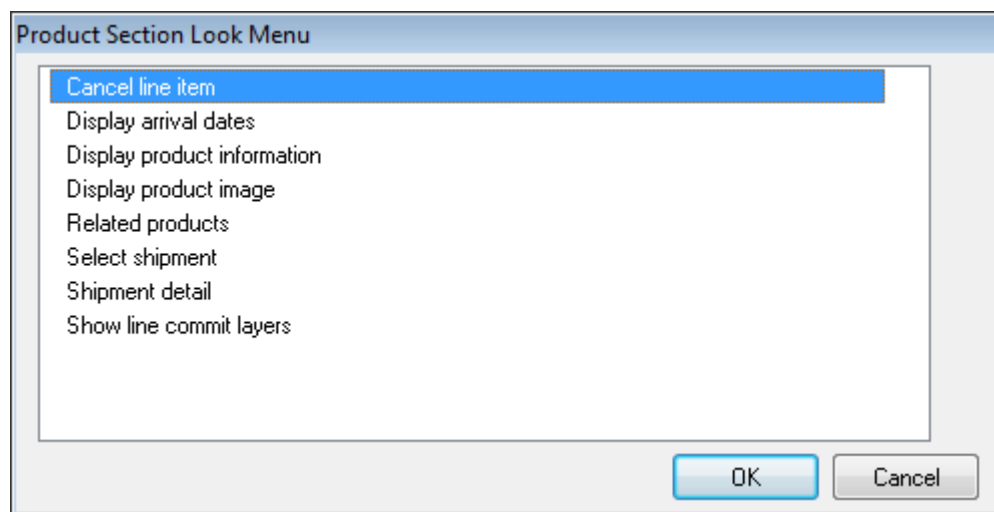
### CANCELING SALES ORDERS

A customer may contact the bookstore requesting that they no longer want an item that they ordered on eRATEX. They may want to partially-cancel or completely cancel their sales order. The ability to cancel individual lines or whole sales orders varies depending on the stage of the order.

### CANCELING RDPK SALES ORDERS

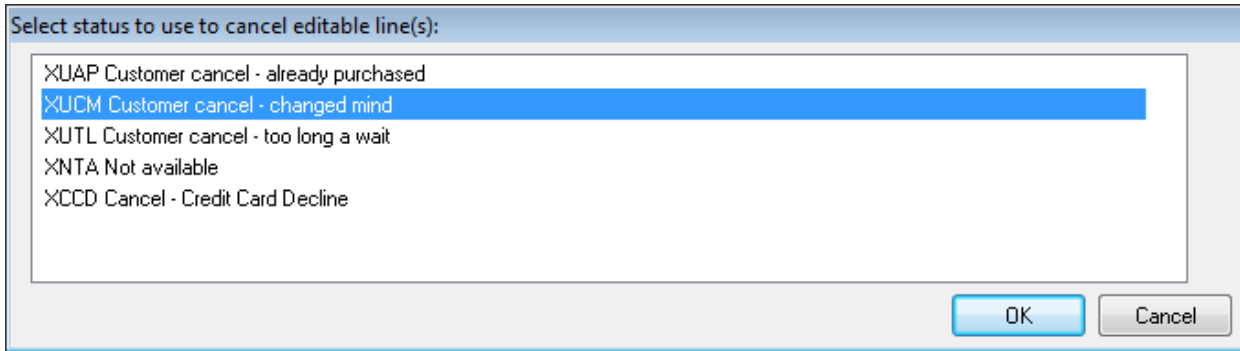
If an order is RDPK, one or more lines can be canceled by doing the following:

Open the order in Sales Order Maintenance and go to the Product Information tab. Highlight the RDPK line to cancel and press F9. The following prompt will appear:



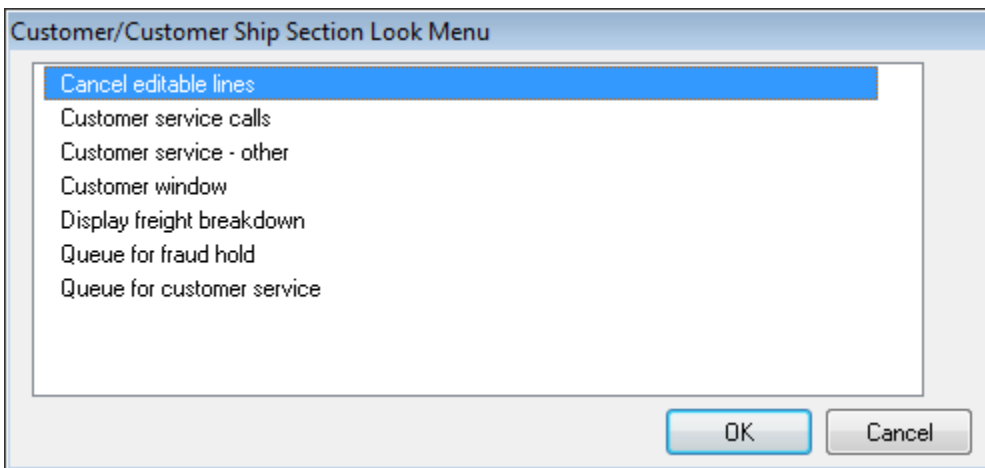
Select Cancel Line Item and click OK.

The following prompt will appear asking for a reason you are canceling the line:



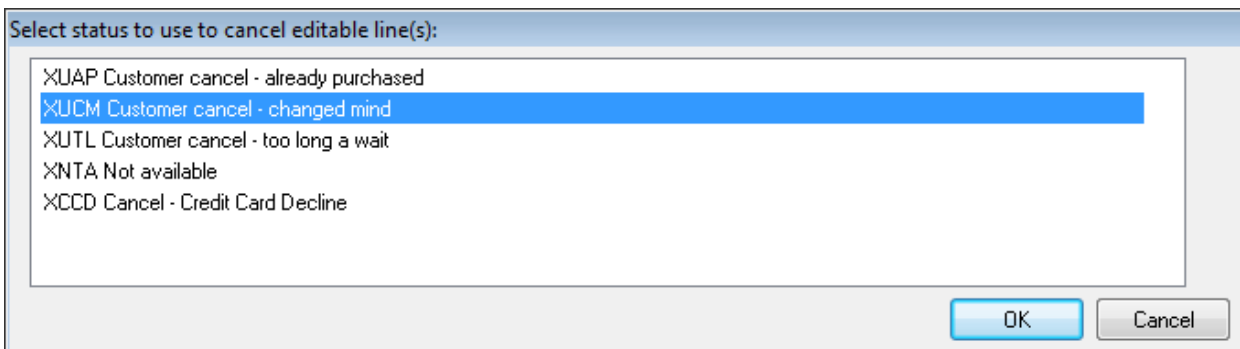
Select one of the reasons and click OK. The line will be canceled.

To cancel the entire sales order, open the order in Sales Order Maintenance and go to the Order Information tab. Press F9. The following prompt will appear:



Select Cancel Editable Lines and click OK.

The following prompt will appear asking for a reason you are canceling the sales order:

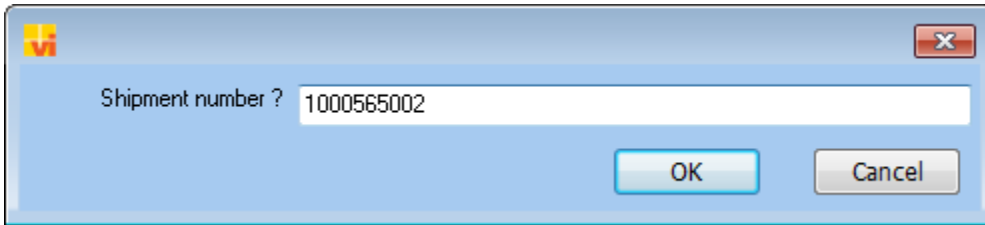


Select one of the reasons and click OK. The sales order will be canceled.

## CANCELING PICK SALES ORDERS

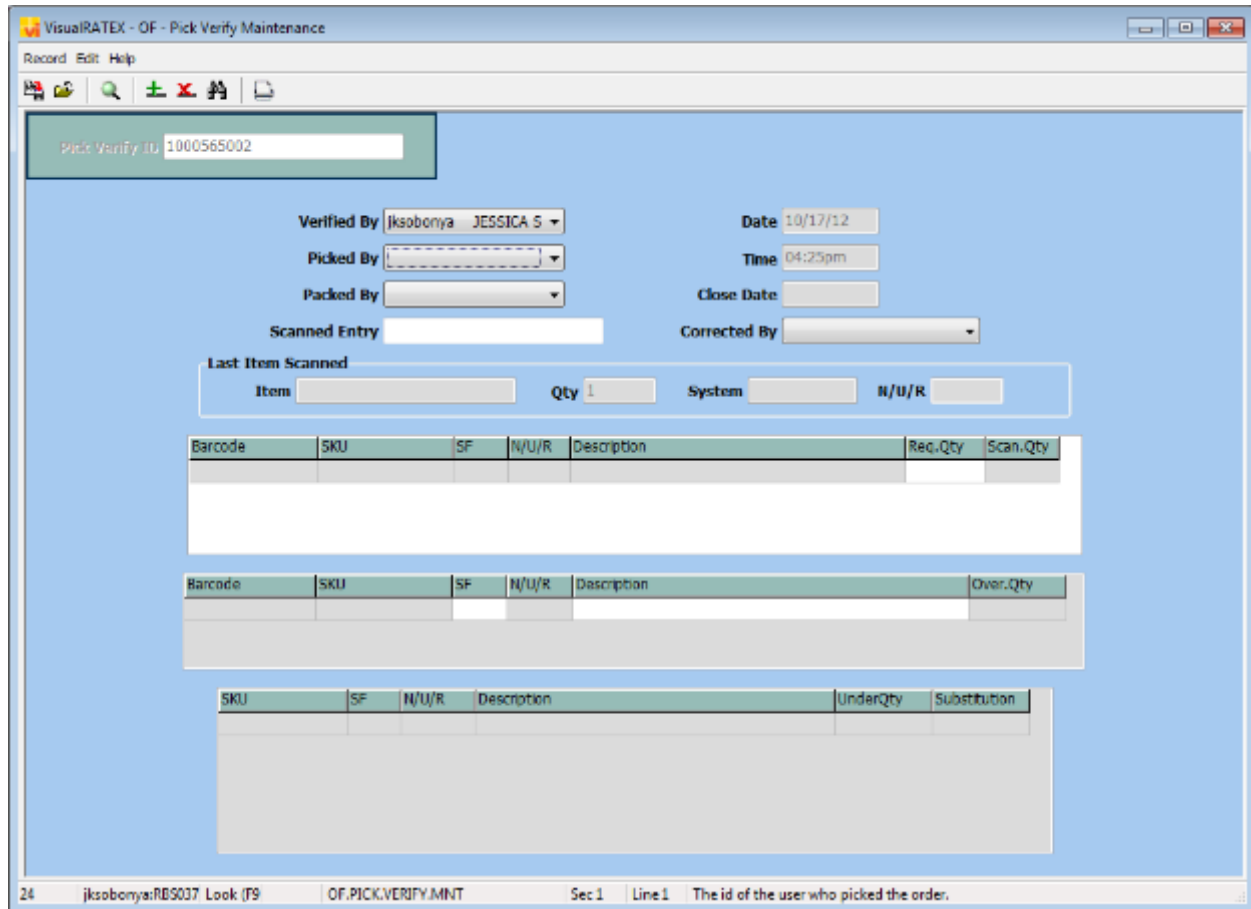
Once a sales order has been picked, it cannot be canceled from the Sales Order Maintenance screen. It must first be canceled in Pick Verify.

Open the sales order in Pick List Verification:



Shipment number ? 1000565002

OK Cancel



VisualRATEX - OF - Pick Verify Maintenance

Record Edit Help

Pick Verify ID: 1000565002

Verified By: jksobonya JESSICA S Date: 10/17/12

Picked By: Packed By: Time: 04:25pm

Scanned Entry: Corrected By:

Last Item Scanned

Item	Qty	System	N/U/R
	1		

Barcode	SKU	SF	N/U/R	Description	Req.Qty	Scan.Qty

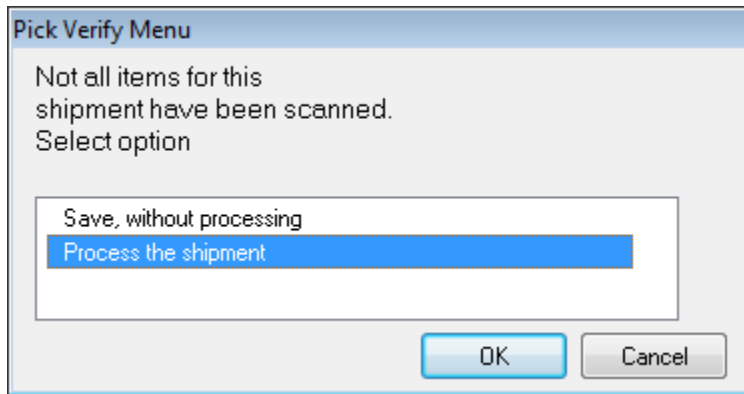
Barcode	SKU	SF	N/U/R	Description	Over.Qty

SKU	SF	N/U/R	Description	UnderQty	Substitution

24 jksobonya:RB5037 Look (F9) OF.PICK.VERIFY.MNT Sec 1 Line 1 The id of the user who picked the order.

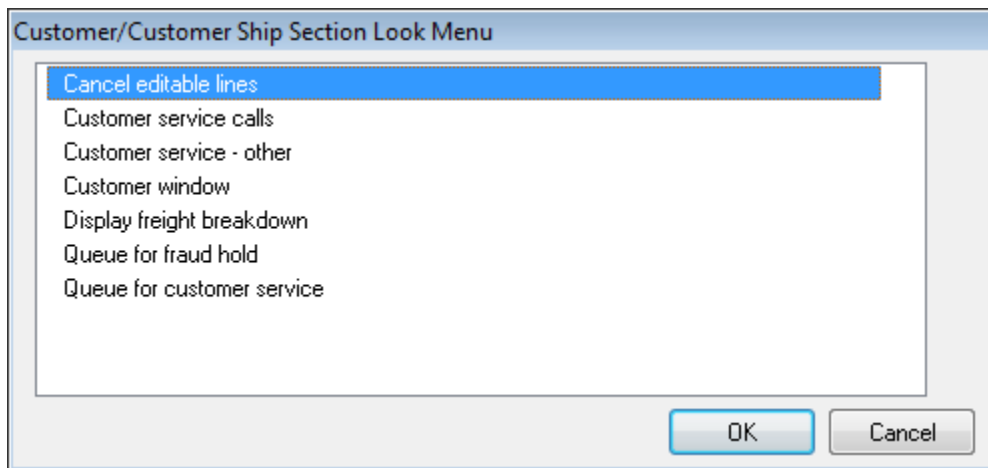
OF.PICK.VERIFY.MNT  
Pick Verify Maintenance screen

Scan the lines that will be packed and shipped. Do not scan the lines that need to be canceled. Do not enter any information if the entire shipment needs to be canceled. Press F10. The following prompt will display:



Select Process The Shipment and click OK. The items that were not scanned will be put on ORDR (backorder). The lines that were scanned will be RDSH and can be shipped.

In Sales Order Maintenance, open the sales order and go to the Order Information tab. Press F9. The following prompt will display:



Select Cancel Editable Lines and click OK.

The following prompt will display asking for a reason the lines are being canceled:

Select status to use to cancel editable line(s):

- XUAP Customer cancel - already purchased
- XUCM Customer cancel - changed mind**
- XUTL Customer cancel - too long a wait
- XNTA Not available
- XCCD Cancel - Credit Card Decline

OK Cancel

Select one of the reasons and click OK. The backordered lines will be canceled.

## CANCELING RDSH SALES ORDERS

Once a sales order has been Pick Verified, it cannot be canceled from the Sales Order Maintenance screen. It must be canceled in Shipment Maintenance.

Open the sales order in Shipment Maintenance:

VisualRATEX - OF - Shipment Maintenance

Record Edit Help

# Shipment ID 1000583001

Name Jessica Sobonya Batch

Address 2250 Hickory Road Create Date 10/17/12 PV Date 10/17/12 Drop 0

City Plymouth Meeting Create Time 06:00am PV Time 02:54pm Type

State PA PENNSYLVANIA Zip 19462 Close Date Vendor Return

DayPh 16108288630 Zone Picked By jksobonya

Schedule Date Sales Order 1000583 Verified By jksobonya

Warehouse 10 ERATEX 3.0 BOOKS Cust 000000582 Date 10/15/12 Corrected By

Ship Method UPSG UPS - Ground Name Jessica Sobonya Packed By jksobonya

Shipped By

Product	Description	Quantity	Pick Qty	Location	Pick list	SKU	Src#	Item	Line type
00056	ERATEX SWEATSHIRT	1	1		000631	2905393	1	1	I

Tracking number	Ship date	Via	Box Cnt	Manifest number	Wt

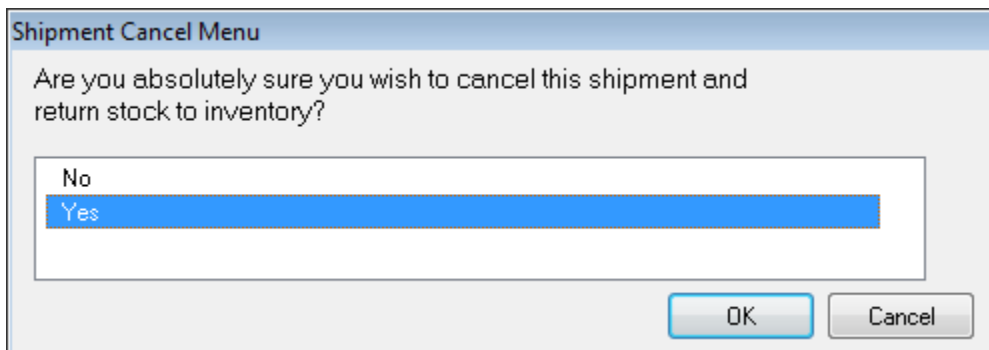
24 jksobonya:RBS037 Look (F9) OF.SHIPMENT.MNT Sec 1 Line 1 The close date of the shipping item, either entered by the system based on the date

OF.SHIPMENT.MNT

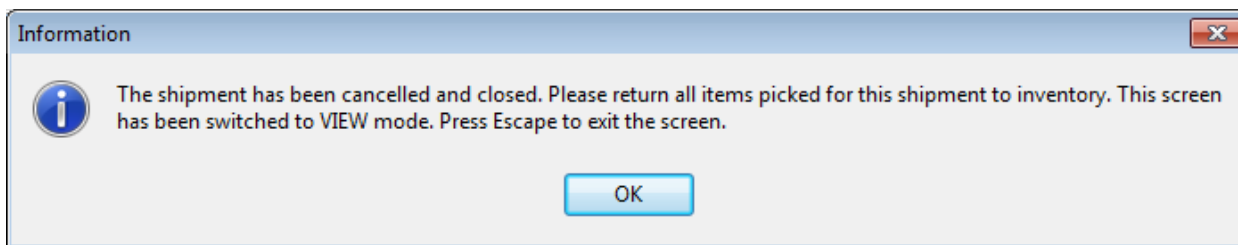


*Shipment Maintenance screen*

Press F9 on the Close Date field. The following prompt will display:



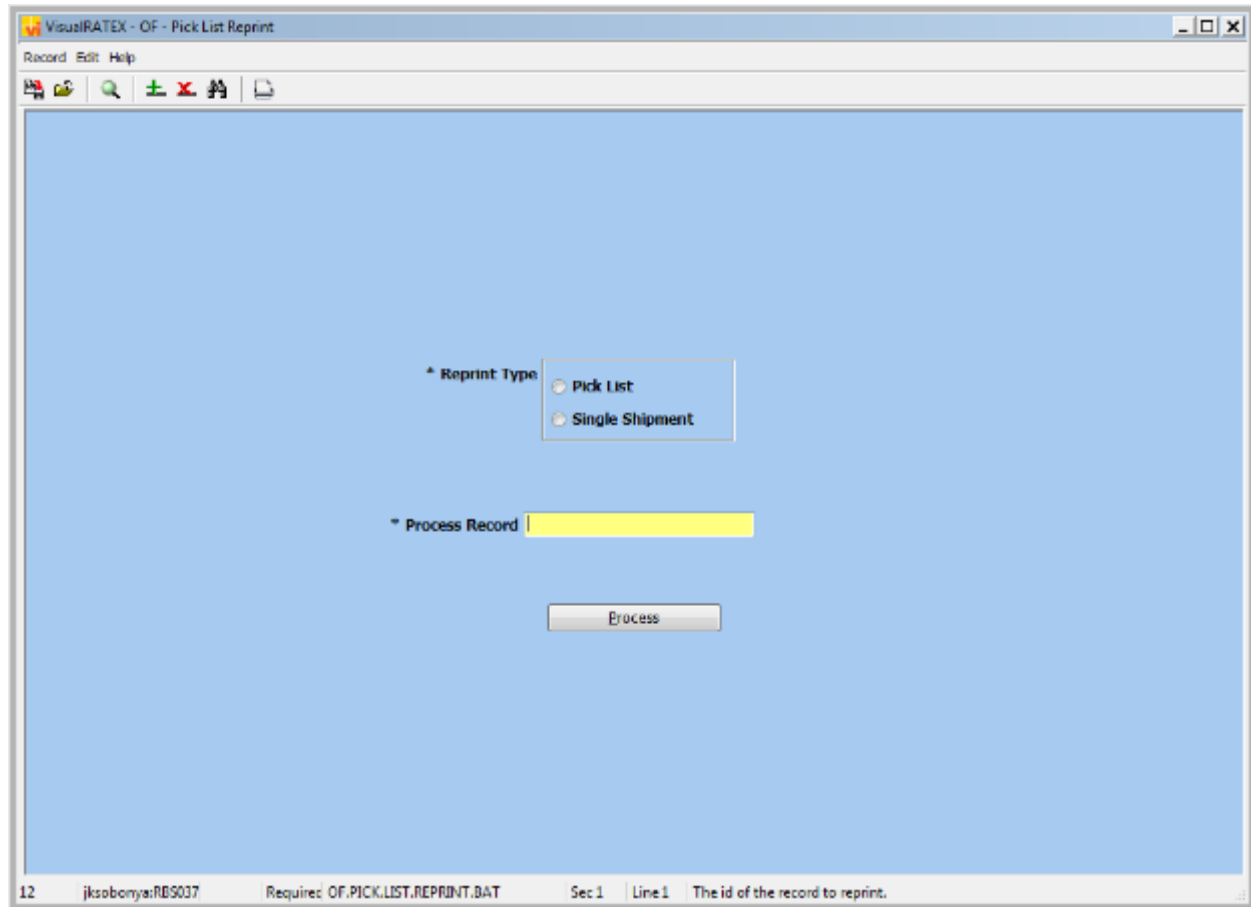
Select Yes to cancel the shipment and return stock to inventory. The following verification prompt will display:



Press ESC to exit the screen.

## REPRINTING PICK LISTS

Pick lists can be reprinted by going to the following menu location: Order Fulfillment > Warehouse Management > Utilities > Pick List Reprint:



*OF.PICK.LIST.REPRINT.BAT  
Pick List Reprint screen*

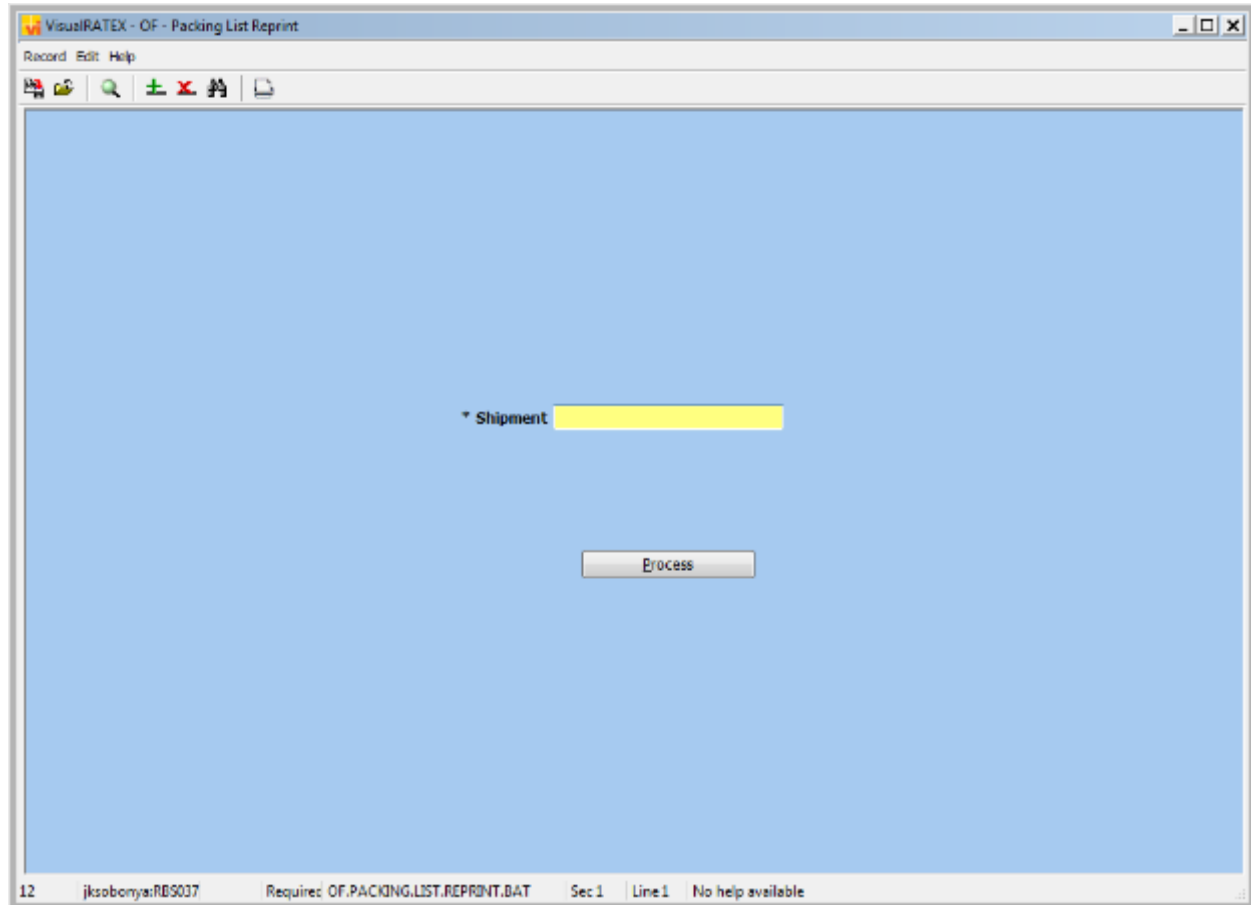
There are two reprint types:

- Pick List - to print an entire pick list run/batch, select Pick List and enter the Pick List ID in the Process Record field. The Pick List ID is NOT the sales order number. When pick lists are printed in Pick List Maintenance, each sales order is assigned a specific Pick List ID. The Pick List ID can be found on the printed pick list summary sheet, or in the Pick List field in Shipment Maintenance. (To access this, open the sales order, go to the Product Information tab, press F9, and select Shipment Detail. This will open the order in OF.SHIPMENT.MNT. If the order has been picked, you will see the Pick List ID in the Pick List field in the grid.)
- Single Shipment - to print a pick list for a single shipment, select Single Shipment and enter the sales order number and the shipment ID in the Process Record field (ex. 0000123001, 0000123 being the sales order number and 001 being the shipment ID).

Click Process to reprint the pick list(s).

## REPRINTING PACKING LISTS

Packing lists can be reprinted by going to the following menu location: Order Fulfillment > Warehouse Management > Utilities > Packing List Reprint:



*OF.PACKING.LIST.REPRINT.BAT  
Packing List Reprint screen*

Packing lists can be reprinted one at a time. Enter the sales order number and the shipment ID in the Shipment field (ex. 0000123001, 0000123 being the sales order number and 001 being the shipment ID). Click Process to reprint the packing list.

## UPDATING ADDRESS INFORMATION

The billing address and/or shipping address may need to be updated during sales order processing. A customer may contact the bookstore requesting a shipping address change. Or, if an order is put on fraud hold (HFAV), the billing address may need to be updated to reflect the correct billing address. If a sales order is INPR/RDPK, the billing address or the shipping address can be updated. Once an order has been picked, the only the billing address information can be updated.

**Tip:**

To update a shipping address on a sales order that has already been picked, put the items on a new shipment, and cancel the previous shipment. The new shipment will be INPR/RDPK and the shipping address can be changed.

## BILLING ADDRESS

The billing address is viewable on the sales order in the Customer Information tab of Sales Order Maintenance:

Product	Discount	Freight	Sales tax	GST	Total
9.95	0.00	6.16	1.00	0.00	17.11

**Customer Information**

\* Cust # 00000582      Phone 16108288630

Full Name Jessica Sobonya      Fax

Search Name Sobonya      Email jksobonya@ratex.com

Address RBS      Suppress Code

2250 Hickory Road      Customer Returns

City Plymouth Meeting

State PA PENNSYLVANIA

Zip 19462

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**Shipment Information**

Shipment 1000585001      Shipped on      Phone 16108288630

Name Jessica Sobonya      Gift Msg      Freight Reason Code IO Internet Order

Search Name Sobonya      \* Ship Via UPSG UPS - Ground      Freight Flag M Manual calculation of

Address 2250 Hickory Road      Freight 6.16      Req Date      Priority N Normal

City Plymouth Meeting      Frt Tax 0.30      Schd Date 10/17/12      \* Warehouse 10 ERATEX 3.0 BO

State PA PENNSYLVANIA      Zip 19462      Frt GST      Arv Date 10/20/12      Ship Tax Locality PA

Tax Status T

24 jksobonya:RBS037 Look (F9) Required OF.SALES.ORDER.MNT      Sec 3      Line 1      If the customer number is known, it can be entered directly in this field, and the sys...

Billing Address on sales order

The billing address is also viewable on the customer record in either the Home Address tab or the Billing Address tab:

Campus Address	Home Address	Customer Ship	Demographics	Occasion	Rental Books	Enrolled Courses
<p><b>Address</b> <input type="text" value="RBS"/></p> <p><input type="text" value="2250 Hickory Road"/></p> <p><b>City</b> <input type="text" value="Plymouth Meeting"/> <b>State</b> <input type="text" value="PA"/> PENNSYLVANIA <b>Zip</b> <input type="text" value="19462"/></p> <p><b>Country</b> <input type="text" value="US United States"/></p> <p><b>Phone</b> <input type="text" value="16108288630"/> <b>Fax</b> <input type="text" value=""/> <b>Email</b> <input type="text" value="jksobonya@ratex.com"/></p>						

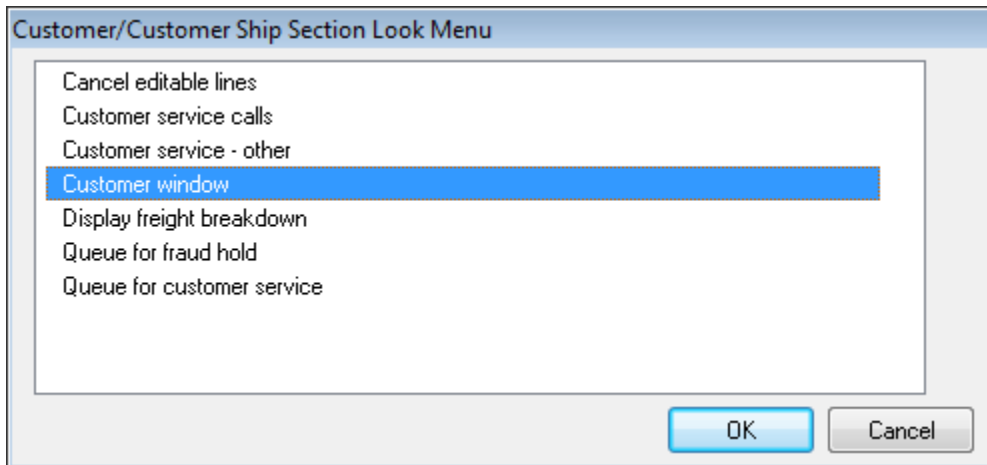
*Billing Address on customer record*

A variety of factors determine whether the billing address is entered in the Campus Address or Home Address tab of the customer record:

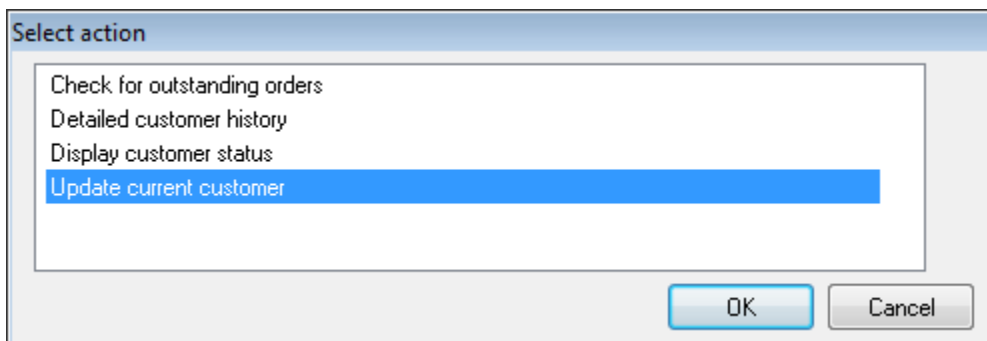
- 1) If the internet order e-mail address matches the e-mail address in the Home Address tab and not the Campus Address tab, then the Home Address tab is updated.
- 2) If not, and the internet order e-mail address matches the e-mail address in the Campus Address tab and not the Home Address tab, then the Campus Address tab is updated.
- 3) If not, and the billing address zip code matches the zip code in the Home Address tab and not the zip code in the Campus Address tab, then the Home Address tab is updated.
- 4) If not, and the billing address zip code matches the zip code in the Campus Address tab and not the zip code in the Home Address, then the Campus Address tab is updated.
- 5) If not, and the billing address zip code's first three digits matches a zip in AV.PARAMETER CAMPUS.ZIPS, then the Campus Address tab is updated.
- 6) Otherwise, the Home Address tab is updated.

(Yes, you read all of that correctly.)

The billing address can be changed any time during order processing. To update the billing address, open the sales order, go to the Customer Information tab, and press F9. The following window will display:



Select Customer Window and click OK. The following window will display:



Select Update Current Customer and click OK.

The Customer Maintenance screen will display. Go to the Home Address or Campus Address tab and update the billing address:

Campus Address	Home Address	Customer Ship	Demographics	Occasion	Rental Books	Enrolled Courses
<p><b>Address</b> <input type="text" value="RBS"/>  <input type="text" value="2250 Hickory Road Suite 10"/></p> <p><b>City</b> <input type="text" value="Plymouth Meeting"/> <b>State</b> <input type="text" value="PA"/> PENNSYLVANIA <b>Zip</b> <input type="text" value="19462"/></p> <p><b>Country</b> <input type="text" value="US United States"/></p> <p><b>Phone</b> <input type="text" value="16108288630"/> <b>Fax</b> <input type="text" value=""/> <b>Email</b> <input type="text" value="jksobonya@ratex.com"/></p>						

Press F10 to save. The Customer Information tab on the sales order will update with the address changes:

Order Information	Customer Information	Product Information	Payment Information	Comments/Special Instructions
* Cust #	00000582		Phone	16108288630
Full Name	Jessica Sobonya		Fax	
Search Name	Sobonya		Email	jksobonya@ratex.com
Address	RBS 2250 Hickory Road Suite 10		Suppress Code	
City	Plymouth Meeting		Customer Returns	
State	PA PENNSYLVANIA			
Zip	19462			

## SHIPPING ADDRESS

The shipping address is viewable on the sales order in the Shipment Information tab of Sales Order Maintenance:

VisualRATEX - OF - Sales Order Maintenance

Record Edit Help

\* Sales Order ID: 1000585

Product	Discount	Freight	Sales tax	GST	Total
9.95	0.00	6.16	1.00	0.00	17.11

Order Information | Customer Information | Product Information | Payment Information | Comments/Special Instructions

Key Code: NONE

Store: 1 RATEX UNIVERSITY B Taken by: geoffh Date: 10/15/12 Live: 10/15/12

Status: INPR In process Time: 11:32:28 Closed

\* Handling: CB Ship current-backorder balance Fraud Reason:

\* Ord Type: I Internet Fraud Rep:

SOB#: Internet Order: 110510 Status Requested:

PO:

Bill to:

Invoice Note: Note by:

Shipment Note: Note by:

Shipment Information

Shipment: 1000585001 Shipped on: Phone: 16108288630 Freight Reason Code: IO Internet Order

Name: Jessica Sobonya Gift Msg: Freight Flag: M Manual calculation of

Search Name: Sobonya Priority: N Normal

Address: 2250 Hickory Road \* Ship Via: UPSG UPS - Ground \* Warehouse: 10 ERATEX 3.0 BO

City: Plymouth Meeting Freight: 6.16 Req Date:

State: PA PENNSYLVANIA Zip: 19462 Frt Tax: 0.30 Schd Date: 10/17/12 Ship Tax Locality: PA

Frt GST: Arv Date: 10/20/12 Tax Status: T

24 | jksobonya:RBS037 Look (F9) | OF.SALES.ORDER.MNT | Sec1 Line1 | The "primary" key code to be used on this order. This key code has two functions:ü

Shipping Address on sales order

The shipping address is also viewable on the customer record in the Customer Ship tab:

Customer Ship	Name	Address	City	State	Zip
000000582.00	Jessica Sobonya	RBS	Plymouth Meeting	PA	19462
000000582.01	Jessica Sobonya	55555 Hickory Road	Plymouth Meeting	PA	19462
000000582.02	Jessica Sobonya	In-Store Pickup	Plymouth Meeting	PA	19462
000000582.03	Jessica Sobonya	2222 Star Lane	Wilmington	DE	19803
000000582.04	Jessica Sobonya	C/O SOBONYA	Plymouth Meeting	PA	19462

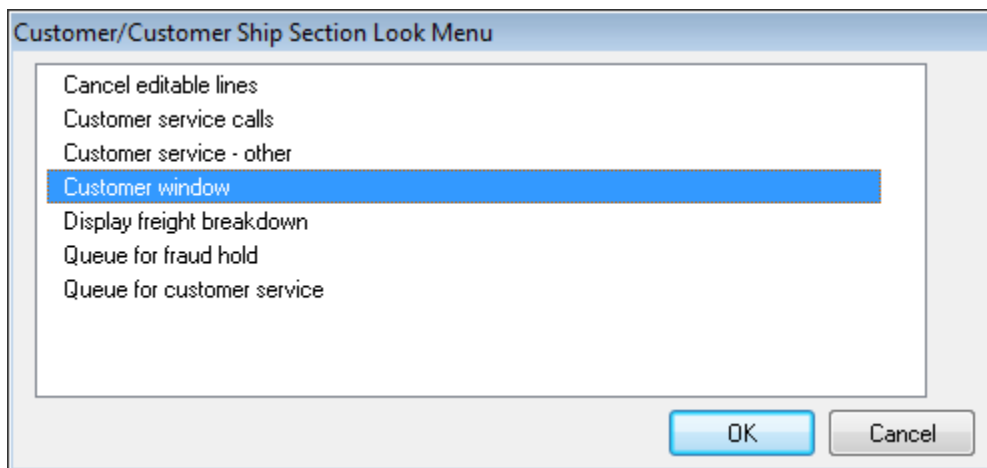
*Shipping Address on customer record*

If a customer places multiple orders with different shipping addresses, each shipping address is recorded in the Customer Ship tab. Shipping addresses are not overwritten.

The shipping address can ONLY be changed when an order is INPR/RDPK or HOBO/ORDR. The reason for this is because modifying a shipping address could potentially change the sales tax calculation(s), which would modify the order total. The order total can only be adjusted if the order is in an editable state, i.e. an INPR/RDPK or HOBO/ORDR order.

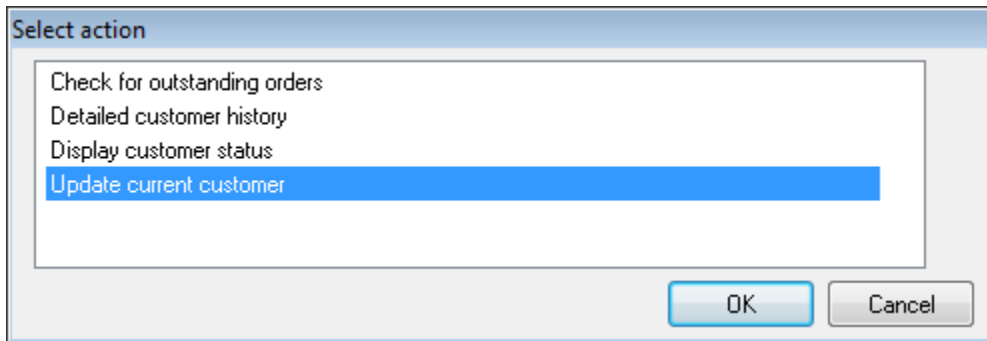
#### Updating Shipping Address

To update the shipping address, open the sales order, go to the Customer Information tab, and press F9. The following window will display:



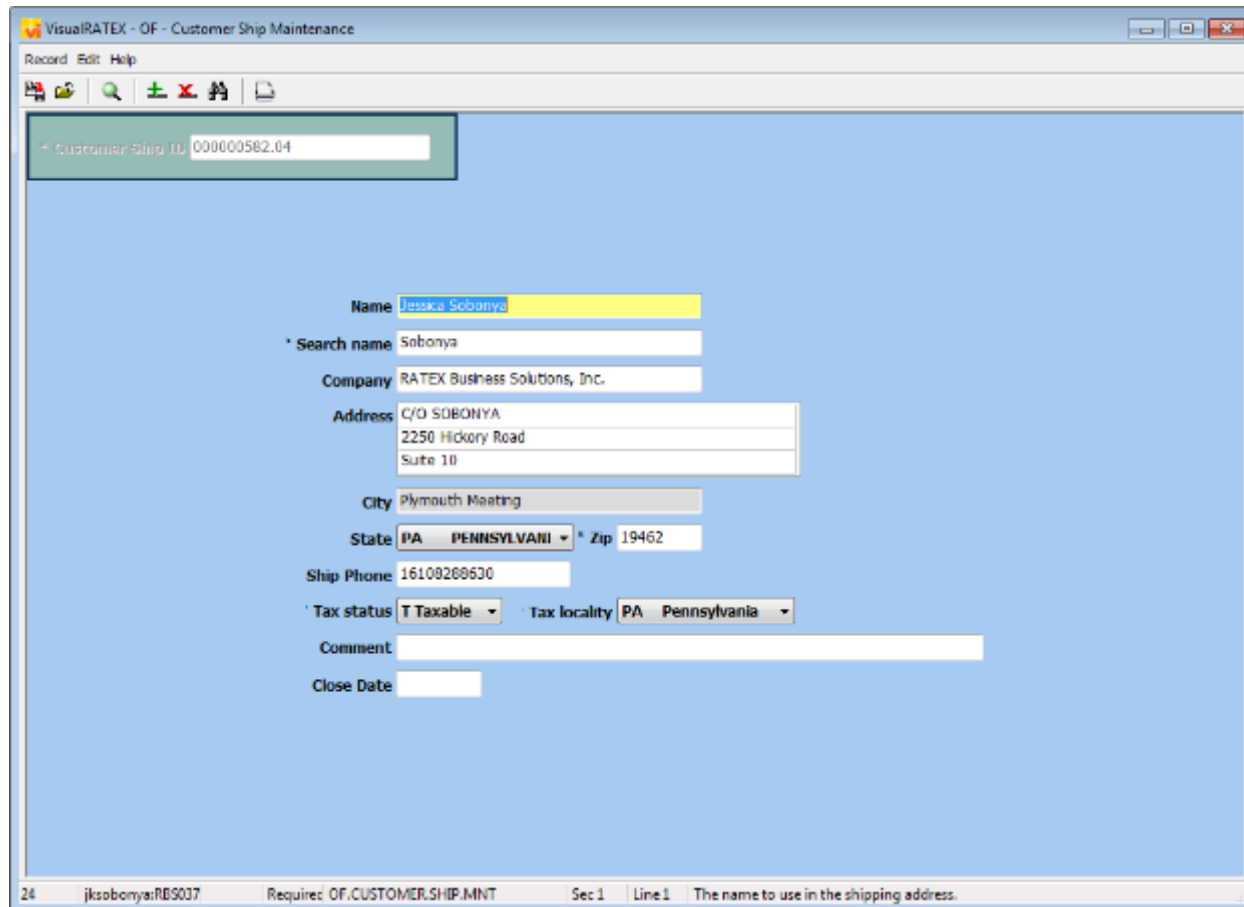
Select Customer Window and click OK. The following window will display:





Select Update Current Customer and click OK.

The Customer Maintenance screen will display. Go to the Customer Ship tab and press F9 on the address that needs to be changed. The Customer Ship Maintenance screen will display:



*OF.CUSTOMER.SHIP.MNT  
Customer Ship Maintenance screen*

Make any changes to the shipping address and press F10 to save the Customer Ship record. Press F10 to save Customer Maintenance.

Go to the Shipment Information section of the sales order and reapply the shipping address that was modified by pressing F9 on the Shipment field:

Shipment Information			
Shipment	1000585001	Shipped on	
Name	Jessica Sobonya	Phone	16108288630
Search Name	Sobonya	Gift Msg	
Address	2250 Hickory Road	* Ship Via	UPSG UPS - Ground
City	Plymouth Meeting	Freight	6.16
State	PA PENNSYLVANIA	Req Date	
Zip	19462	Frst Tax	0.30
		Schd Date	10/16/12
		Frst GST	
		Arv Date	10/19/12
		Freight Reason Code	IO Internet Order
		Freight Flag	M Manual calculation of
		Priority	N Normal
		* Warehouse	10 ERATEX 3.0 BO
		Ship Tax Locality	PA
		Tax Status	T

23 | jksobonya:RBS037 Look (F9) | OF.SALES.ORDER.MNT | Sec 2 | Line 1 | The shipment field controls the update of all ship-to addresses for all of the shipme...

The following window will display:

Setup/modify shipments

Selection

- Setup a new shipment
- Modify Shipment 002

OK Cancel

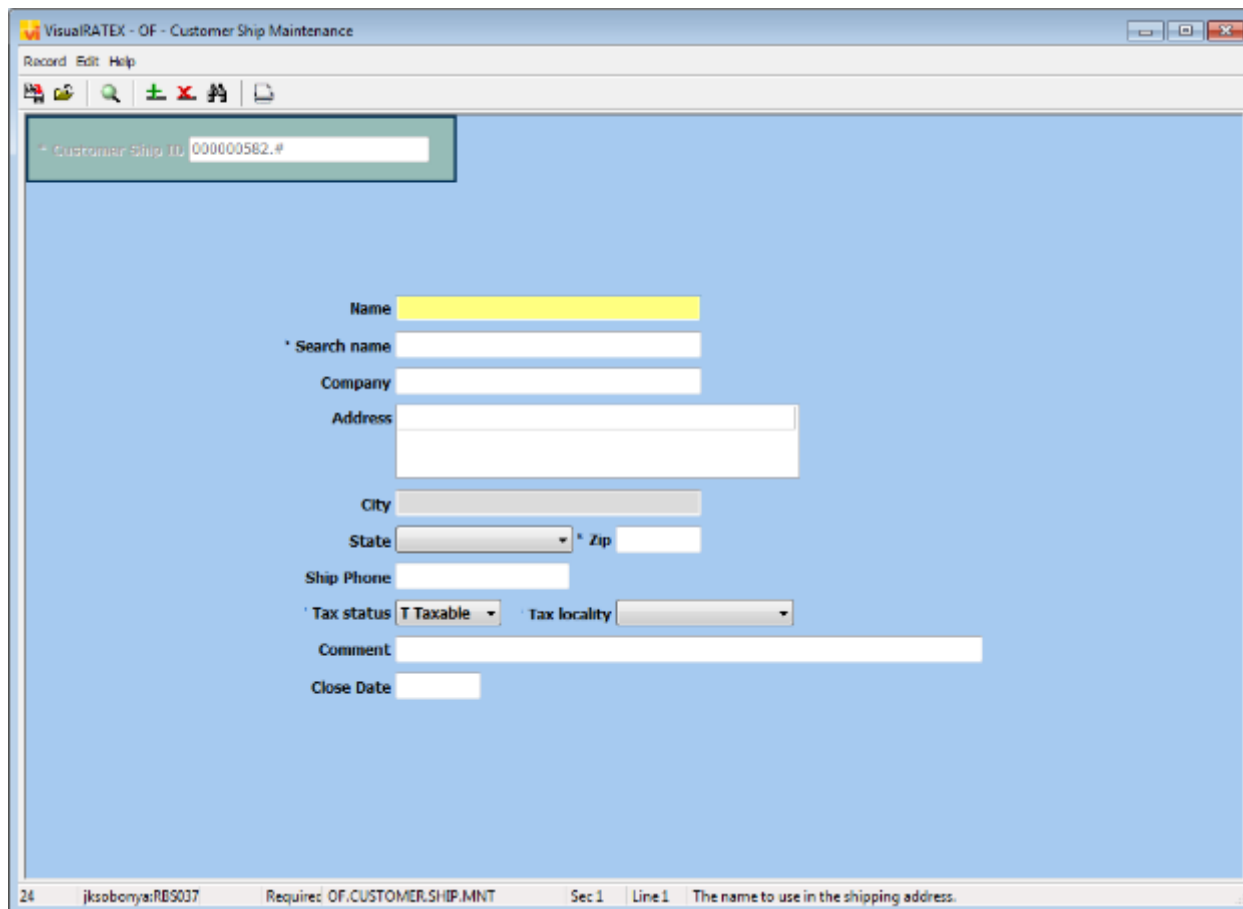
Select Modify Shipment \_\_\_ and click OK. The following window will appear:

Customer Ship Menu Select a single customer ship

Name	Address	City	St
Jessica Sobonya	RBS 2250 Hickory Road Suite 10	Plymouth Mee...	PA
Jessica Sobonya	55555 Hickory Road	Plymouth Mee...	PA
Jessica Sobonya	In-Store Pickup 2250 Hickory Rd	Plymouth Mee...	PA
Jessica Sobonya	2222 Star Lane	Wilmington	DE
Jessica Sobonya	C/O SOBDONYA 2250 Hickory Road Suite 10	Plymouth Mee...	PA
Jessica Sobonya	Bay Adelaide Centre 333 Bay Street Toronto ON Canada M5H2T4		FC
Jessica Sobonya	2250 Hickory Road	Plymouth Mee...	PA
Jessica Sobonya	45 Starland Blvd	Wilmington	DE
Jessica Sobonya	2250 Hickory Rd	Plymouth Mee...	PA
Add a new customer ship			

Select the modified shipping address and click OK. The shipping address will be applied to the shipment.  
 Adding A New Shipping Address

In addition to editing an existing shipping address, a brand new shipping address can be added as well. When “Modify Shipment \_\_\_” is selected above, there is an option to “Add a new customer ship” at the end of all shipping addresses on file for the customer. Select “Add a new customer ship” to open Customer Ship Maintenance and add a new shipping address:



*OF.CUSTOMER.SHIP.MNT  
Customer Ship Maintenance screen*

Enter the customer's name, zip code (the city/state will auto-populate when a zip code is entered), address, phone number, tax status, and tax locality. Press F10 to save the record and use the shipping address on the shipment.

## ADDING/CHANGING ITEMS

After a customer places a web order on eRATEX, he may contact the bookstore asking for an additional item, or a different-sized item, than what he originally ordered. Items can be added to sales orders when they are RDPK.

To add an item to a sales order, open the sales order in Sales Order Maintenance and go to the Product Information tab:

Order Information		Customer Information		Product Information		Payment Information		Comments/Special Instructions					
Key Code	Product	Description	Color	Style	Size	Qty	Shippable?	Expected	Shipment	Price Each	Stat	Line Comment	Pe
NONE	00055	ERATEX PEN	500		NA	1	1	10/16/12	001	9.95	RDPK		

To add an item to a sales order, press F4 or . Enter a Key Code of NONE and enter the ISBN/SKU/Web ID that the customer wants to purchase. Enter the QTY that the customer wants to purchase. Continue adding lines until all of the items have been added to the sales order. The order total increases as lines are added to the sales order. For full-auth sales orders, the additional payment will go on a second line in Payment Information so it can be authed on the customer’s credit card when the sales order is saved. For partial-auth sales orders, the additional payment is tallied and will be authed/settled when the shipment closes in Shipment Maintenance. When finished, press F10 to save the sales order.

**Tips:**

- A) Verify that the Payment Information tab displays accurate payment information before you save the sales order.
- B) If the student requests a different sized item, cancel the line on the sales order and add the correct item.
- C) If the sales order has been picked (and the lines have a status of PICK), lines cannot be modified in Sales Order Maintenance. If the student requests an order change at this stage, do not scan the appropriate lines in Pick List Verification. This will backorder the lines. Add the appropriate lines on shipment 002, and cancel the backordered lines.

## CHANGING SHIPPING & HANDLING

After a customer places an order on eRATEX, he may contact the bookstore asking for a different shipping method. For example, he originally selected UPS-Ground shipping but wants it upgraded to UPS-2 Day.

Tips:

A) Make sure that the Freight Flag field is set to M-Manual Calculation or the freight cannot be modified.

B) Make sure that the Ship Via method has a Ship Method defined in Ship Method Maintenance and a corresponding Ship Days record defined in Ship Days Maintenance. For additional information, see the Shipping & Handling Setup section.

To change the shipping & handling of a sales order, open the sales order in Sales Order Maintenance:

VisualRATEX - OF - Sales Order Maintenance

Record Edit Help

\* Sales Order ID 1000584

Product	Discount	Freight	Sales tax	GST	Total
39.99	0.00	8.19	0.41	0.00	48.59

Order Information | Customer Information | Product Information | Payment Information | Comments/Special Instructions

Key Code: NONE

Store 1: RATEX UNIVERSITY B | Taken by: jksobonya | Date: 10/15/12 | Live: 10/15/12

Status: INPR | In process | Time: 11:25:39 | Closed:

\* Handling: CB Ship current-backorder balance

\* Ord Type: I Internet

SOB#:  | Internet Order: 110506

PO:

Bill to:

Invoice Note:  | Note by:

Shipment Note:  | Note by:

Shipment Information

Shipment: 1000584001 | Shipped on:  | Phone: 16108288630

Name: Jessica Sobonya | Gift Msg:

Search Name: Sobonya

Address: 2250 Hickory Road

City: Plymouth Meeting

State: PA | PENNSYLVANIA | Zip: 19462

\* Ship Via: UPSG UPS - Ground

Freight: 8.19 | Req Date:

Frt Tax: 0.41 | Schd Date: 10/17/12

Frt GST:  | Arr Date: 10/20/12

Freight Reason Code: IO Internet Order

Freight Flag: M Manual calculation of

Priority: N Normal

\* Warehouse: 10 ERATEX 3.0 BO

Ship Tax Locality: PA

Tax Status: T

24 | jksobonya:RBS037 Look (F9) | OF.SALES.ORDER.MNT | Sec 2 | Line 1 | The shipment field controls the update of all ship-to addresses for all of the shipme

OF.SALES.ORDER.MNT

*Sales Order Maintenance screen*

The shipping & handling details are located at the bottom of the screen. Select the appropriate Ship Method from the Ship Via field, enter the new freight cost in the Freight field, and press F10 to save.

## **SPLIT SHIPMENTS**

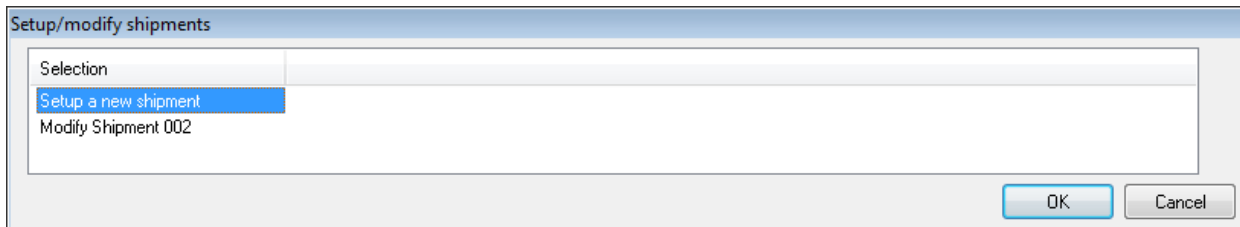
If the inventory handling status is “CB”, sales orders will split into two shipments based on available inventory; one shipment will have in stock items, and the other shipment will have out of stock items. Each shipment requires its own authorization to charge/settle for the items on the shipment. Each shipment can be processed independently.

A sales order may need to split into more than two shipments. Sales orders can be split manually into as many shipments as necessary. In the 37A .17 release, subsequent shipments can be automatically split using a “Sales Order Split Maintenance” screen.

Split shipments can also be combined back onto one shipment.

## **SPLIT SHIPMENTS - MANUALLY**

If the default sales order handling status is “CB”, an unlimited number of shipments can be created per sales order. To create a new shipment, open the sales order in Sales Order Maintenance. Press F9 in the Shipment field in the Shipment Information section of the screen. The following prompt will display:



Select “Setup a new shipment” and click OK. A shipping address for the new shipment is required. The following prompt will display:

Customer Ship Menu Select a single customer ship

Name	Address	City	St
Jessica Sobonya	RBS 2250 Hickory Road Suite 10	Plymouth Mee...	PA
Jessica Sobonya	55555 Hickory Road	Plymouth Mee...	PA
Jessica Sobonya	In-Store Pickup 2250 Hickory Rd	Plymouth Mee...	PA
Jessica Sobonya	2222 Star Lane	Wilmington	DE
Jessica Sobonya	C/O SOBONYA 2250 Hickory Road Suite 10	Plymouth Mee...	PA
Jessica Sobonya	Bay Adelaide Centre 333 Bay Street Toronto ON Canada M5H2T4		FC
Jessica Sobonya	2250 Hickory Road	Plymouth Mee...	PA
Jessica Sobonya	45 Starland Blvd	Wilmington	DE
Jessica Sobonya	2250 Hickory Rd	Plymouth Mee...	PA
Add a new customer ship			

Select a shipping address from the list of available shipping addresses and click OK. If necessary, select “Add a new customer ship” to add a new shipping address for the customer.

The new shipment has been created. The next step is to apply the new shipment to items on the sales order.

Open the sales order in Sales Order Maintenance and go to the Product Information tab. A Shipment column is in between the Expected and Price Each columns. Press F9 on the Shipment field to toggle between open shipments, and change the shipment:

Key Code	Product	Description	Color	Style	Size	Qty	Shippable?	Expected	Shipment	Price Each	Stat	Line Comment
NONE	9780195219487	HOGG RICHARD / INTRODUC...				1	1	10/17/12	001	30.00	RDPK	
NONE	9780073383118	SMITH / CALCULUS				1	1	10/17/12	001	158.00	RDPK	
NONE	00056	ERATEX SWEATSHIRT			S	1		10/22/12	002	39.99	RDPK	

If all other shipments have been processed, the new shipment will be the only choice. Once an item/shipment has been picked, the shipment cannot be changed or modified.

If a new shipment is created but not used, a warning will display when the sales order is saved that the shipment has not been used, and to make the appropriate modifications:



Shipment number 1000575002 is not used.

The shipment must be deleted if you will not be using it, however if you do wish to use this shipment, answer NO and make the appropriate change(s) on the order.

NO, return to order

YES, delete this shipment

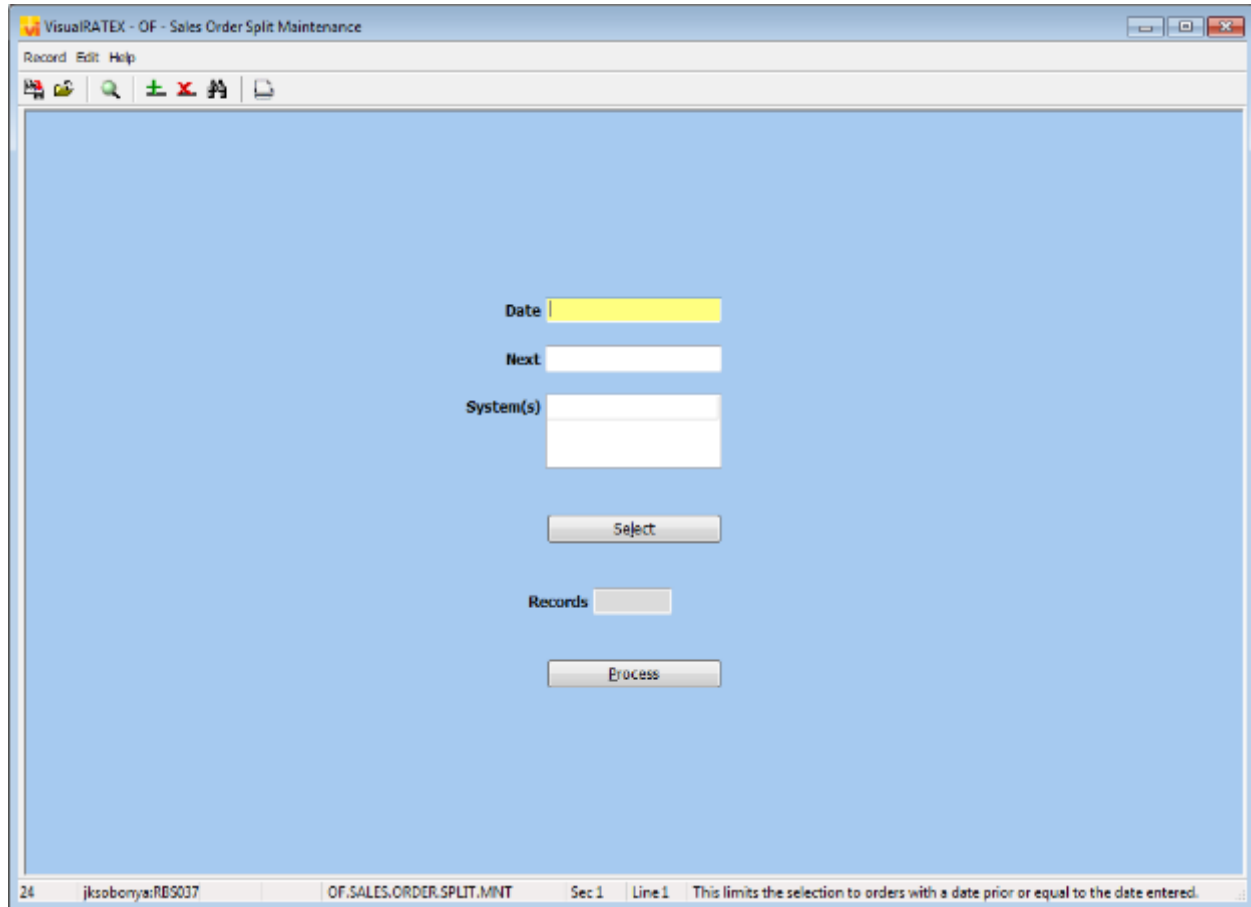
OK

Cancel

## **SPLIT SHIPMENTS - AUTOMATICALLY**

In the 37A .17 release, shipments can be “automatically” split on any sales order, in addition to the shipment 001/002 split that occurs when a sales order is initially created in Order Fulfillment. Using this process, sales orders can be split based on date, system, and number of shipments.

To split any shipment automatically, go to Order Fulfillment > Order Entry & Customer Service > Split Shipments:



*OF.SALES.ORDER.SPLIT.MNT  
Split Shipment Screen*

Select how many orders to split. Clicking the "Select" button without entering any criteria will select all orders that are INPR/RDPK with subsequent shipments that can split based on available inventory. The Records field will display the number of orders that will split when the process is run. There are a few filtering options to use, if necessary:

Date - enter a date to limit the selection to orders with an order date prior or equal to the date entered.

Next - enter a number to limit the selection to the next "x" orders. For example, entering a "5" will select the next 5 orders that can split.

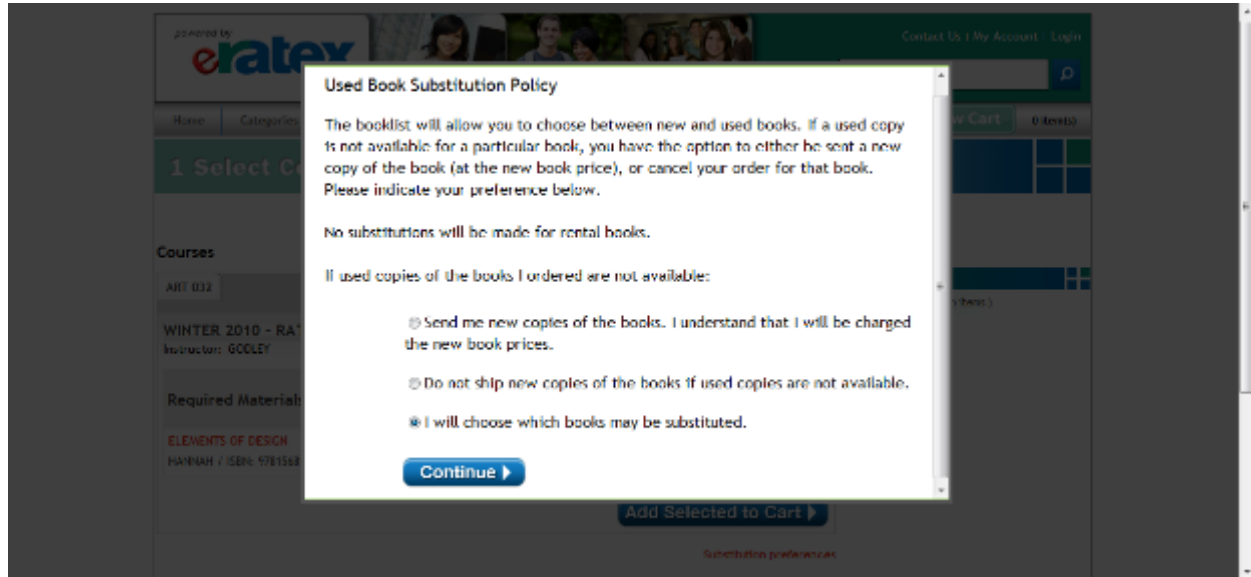
System(s) - enter one or more systems (TX/TR/GM) to limit the selection of orders to those systems.

When finished defining the criteria, click the Process button. The shipments will split, and the process will return to the VisualRATEX Splash screen.

## SUBSTITUTIONS

In eRATES, a student has the ability to select whether or not a textbook can be “substituted” if the book that they order is not in stock when the order is fulfilled. For example, the student orders the used book, but the used book is not available; if they allow substitution, and the new book is available, they will get the new book.

When the student first arrives at the Book List page, a Used Book Substitution Policy will display, as shown below:



*Used Book Substitution Policy*

Students can select which substitution preference they prefer. A common selection is, “I will choose which books may be substituted,” and students can make their substitution selections for each book that they want to buy from the Book List Page:

Required Materials	select all: <b>new</b>   <b>used</b>	Allow substitution? (required)	unselect item
<b>LANGUAGE OF MEDICINE (W/CD )</b> CHABNER / ISBN: 9781416034926	<input type="radio"/> <b>NEW: \$67.95</b> <input checked="" type="radio"/> <b>USED: \$47.75</b> Out of Stock	<input checked="" type="radio"/> <b>Yes</b> <input type="radio"/> <b>No</b>	<b>X</b>
<b>ANATOMY &amp; PHYSIOLOGY</b> SALADIN / ISBN: 9780077276201	<input type="radio"/> <b>NEW: \$190.50</b> <input checked="" type="radio"/> <b>USED: \$133.50</b> Out of Stock	<input type="radio"/> <b>Yes</b> <input checked="" type="radio"/> <b>No</b>	<b>X</b>

*Substitution Preferences*

When a textbook substitution preference is selected, the preference will be downloaded -- along with the rest of the order information -- to Order Fulfillment. During order processing, substitution can occur in a number of ways, and the logic is enhanced even further with release 37A .16.

## **ORIGINAL SUBSTITUTION LOGIC**

---

Prior to release 37A .16, textbook substitution would occur in the following ways:

1. During the internet order to sales order conversion, the substitution preference and available inventory levels of the textbook are checked. If there is no inventory for the preferred textbook on the order (i.e. used), and the other textbook (i.e. new) is available, and the substitution preference is “Y”, the textbook will be immediately substituted on the order; the order total would be updated and an additional authorization would be created for the difference in price if using full authorizations (see the [Authorization Logic section](#) above).
2. If the textbook had available inventory for the preferred textbook on the order when the sales order was created, but not when the order was ready to be picked, the order could be opened and saved to perform an inventory check and substitute the textbook.
3. If the textbook had available inventory for the preferred textbook on the order when the sales order was picked, but not when the order was ready to be pick verified, the textbook should not be scanned during pick verification. The textbook would be put on a separate shipment, an inventory check would be performed, and the textbook would be substituted.

While the above scenarios worked well for a portion of substituted textbook orders, there were cases where the logic was cumbersome and revision was necessary to make the substitution process easier.

## **ENHANCED SUBSTITUTION LOGIC**

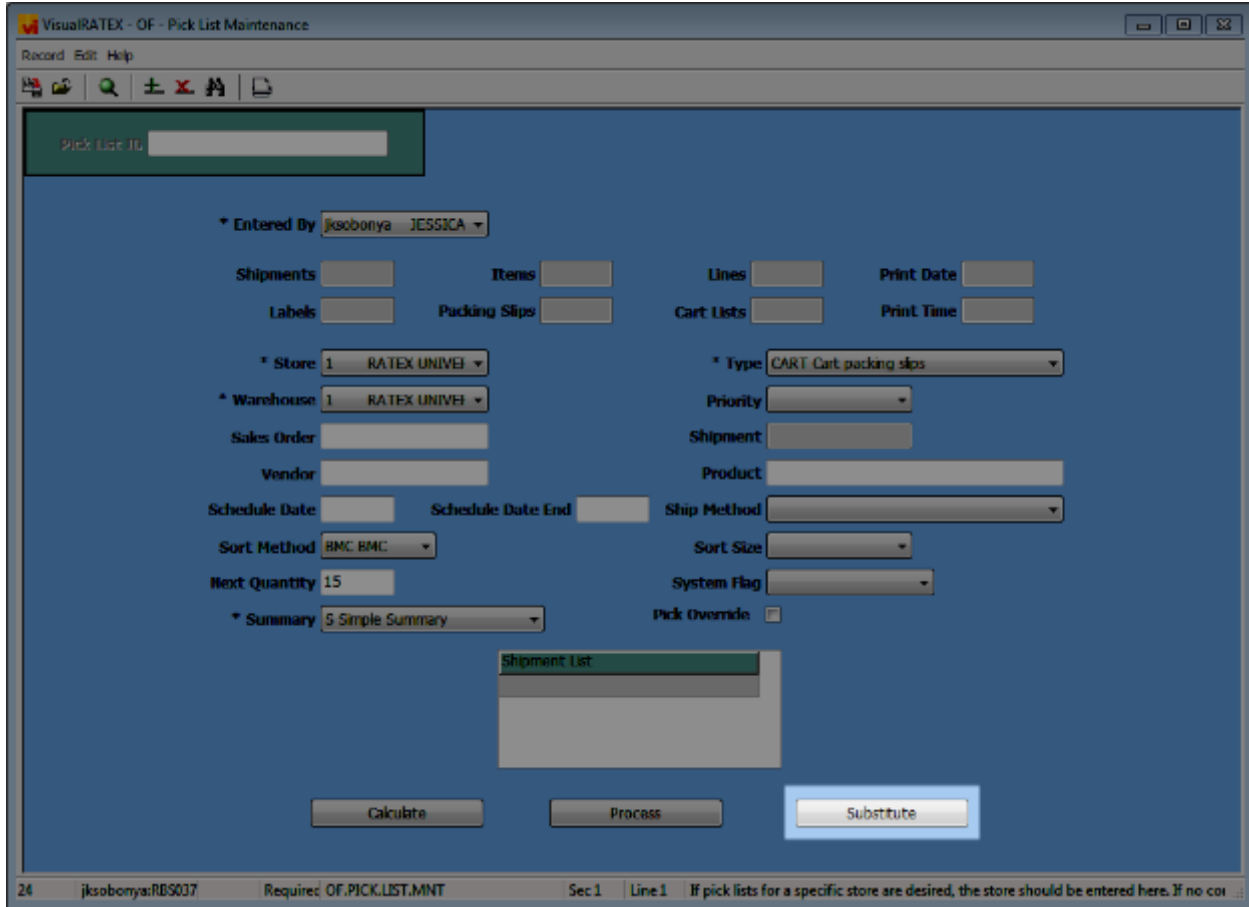
---

The substitution logic has been extensively enhanced in the 37A .16 release of VisualRATEX, making all of the prior substitution logic obsolete.

Sales orders will no longer substitute “automatically” during the internet order to sales order conversion, or at any other time. Sales orders can be substituted during both the picking process and the pick verification process.

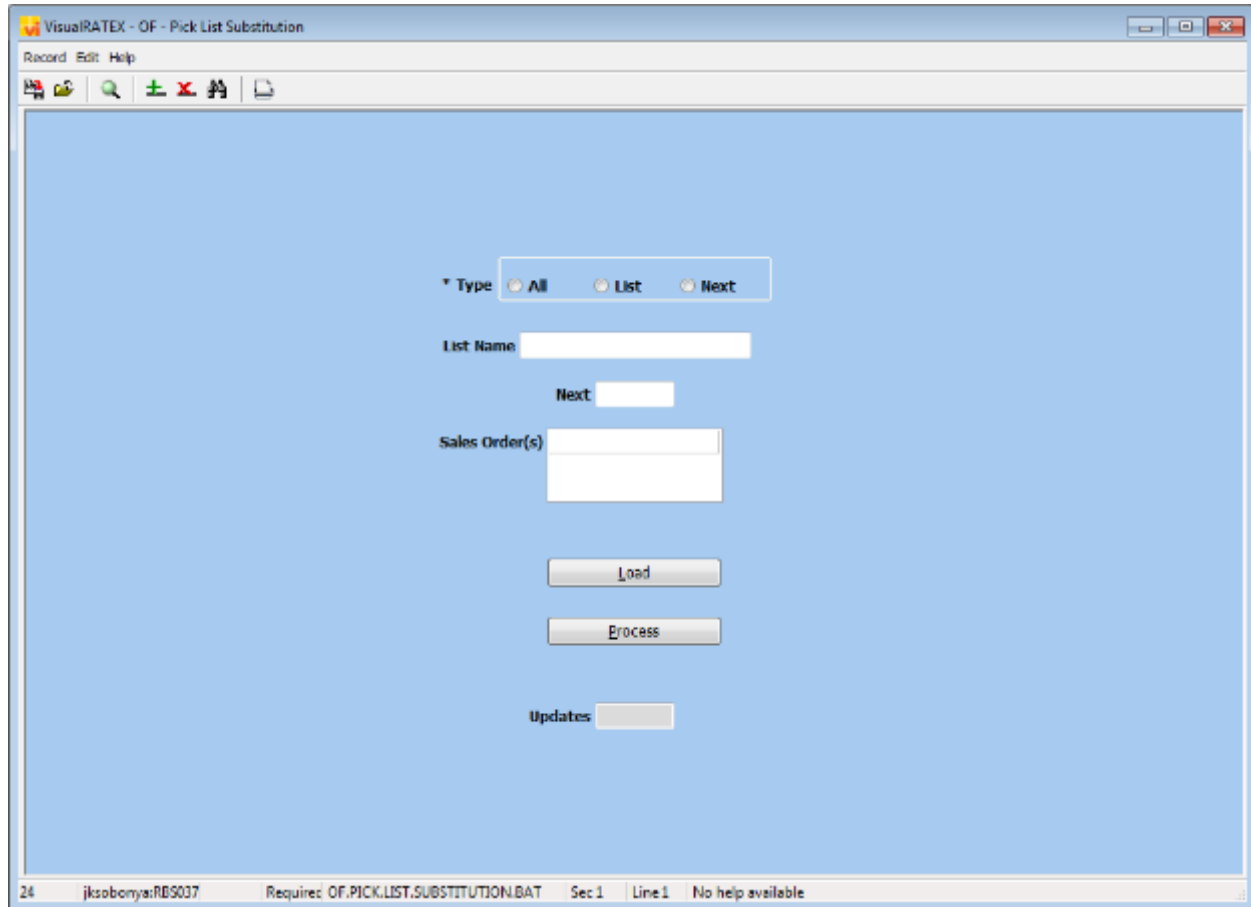
### **PICK LIST SELECTION**

In the Pick List Selection screen, there is a new Substitute button:



*OF.PICK.LIST.MNT  
Pick List Selection screen*

Clicking the Substitute button displays a new Pick List Substitution screen:



*OF.PICK.LIST.SUBSTITUTION.BAT  
Pick List Substitution screen*

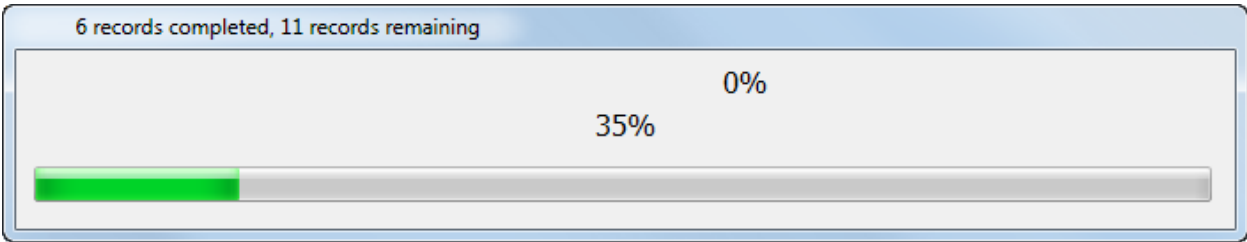
Here, sales orders can be selected, analyzed, and substituted. The process will load any textbook sales orders that are INPR/RDPK. To select sales orders to analyze, choose one of three options:

- All – Selecting “All” will load all textbook sales orders that are INPR/RDPK
- List – Selecting “List” and entering a saved list will select all sales orders that meet that criteria
- Next – Selecting “Next” and entering a number in the Next field will only select that number of sales orders to process. For example, if there are 100 textbook orders that are INPR/RDPK, if “Next” is selected and “10” is entered, the process will only load the first 10 orders, not all 100.

After selecting an option, click the Load button. The applicable sales order numbers will display in the Sales Order(s) field:

<b>Sales Order(s)</b>	1000569
	1000575

These are the sales orders that will be analyzed for substitutions. When the Process button is clicked, the textbooks on each sales order will be analyzed. If there is inadequate inventory for a textbook and the Substitute flag is “Y”, the textbook will be substituted on the sales order. During the analyzation, a status bar will display, noting the progress:



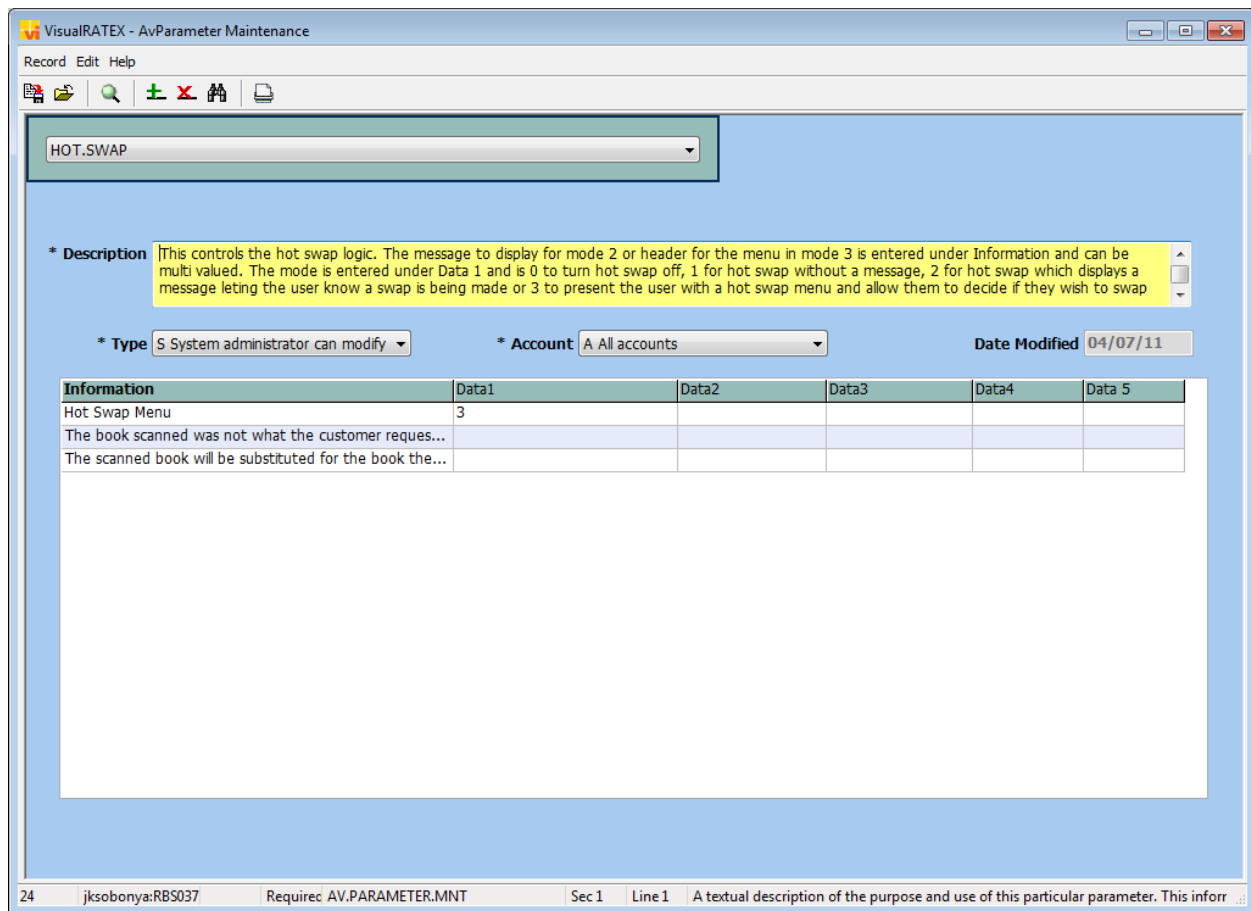
When finished, an Information window will display how many sales orders were substituted. The sales orders can be picked and processed.

Tip: In 37A 19.1 the Pick List Substitution screen has been modified with additional filters to include or exclude shipping methods. The “Next” radio button has been removed because it is redundant. To substitute a specific number of sales orders, select “All”, enter the number of sales orders to substitute in the “Next” field, and click the Load button to queue the sales orders for substitution.

**PICK LIST VERIFICATION**

Textbooks can be substituted, or “hot swapped”, during the pick list verification process. There are several reasons to substitute a textbook at this stage: inventory may run out for the preferred textbook on the sales order between the time the sales order was picked and the time of verification; one might accidentally grab the incorrect textbook from the shelf, etc.

This substitution process is controlled by parameters. The parameters are located at the following menu location: Admin > Parameters > AvParameter, HOT.SWAP.



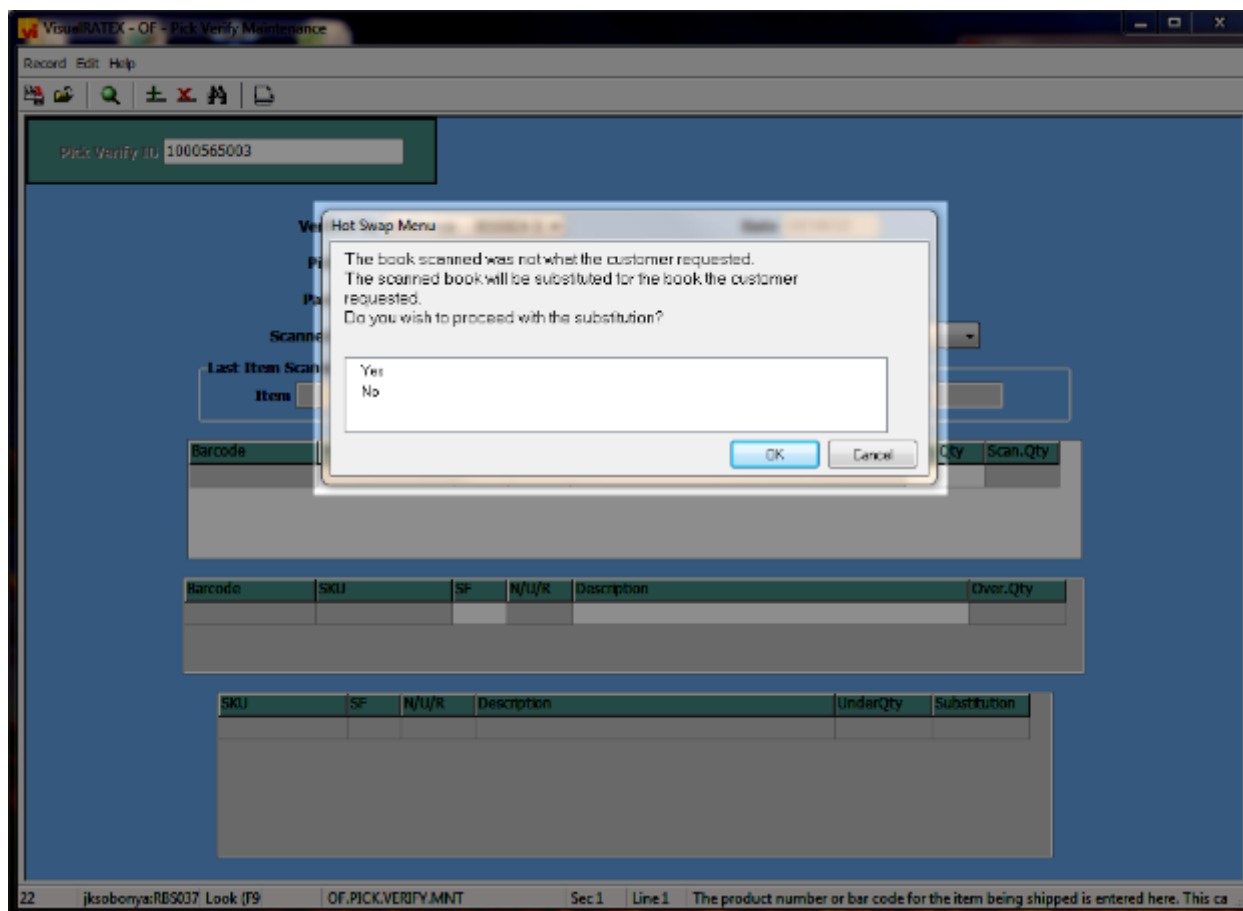
**AV.PARAMETER.MNT**  
AvParameter Maintenance screen, HOT.SWAP

This controls the “hot swap” logic. There are several ways to use the logic based on what number is entered in Data1, Value 1:

- 0 – Zero turns off the “hot swap” logic.
- 1 – One turns on the “hot swap” logic with no messages letting the user know when a hot swap is being made.
- 2 – Two turns on the “hot swap” logic and displays a message as defined in Information Values 2 & 3, letting the user know when a hot swap is being made.
- 3 – Three turns on the “hot swap” logic, displays a message as defined in Information Values 2 & 3, and presents a selection menu allowing the user to decide if they wish to swap or not. *(This option is recommended by RBS.)*



Once a hot swap selection is defined, a substitution / hot swap can be done during pick list verification. In the below example, the used book is scanned instead of the new book, resulting in a hot swap:



*Hot Swap during Pick List Verification*

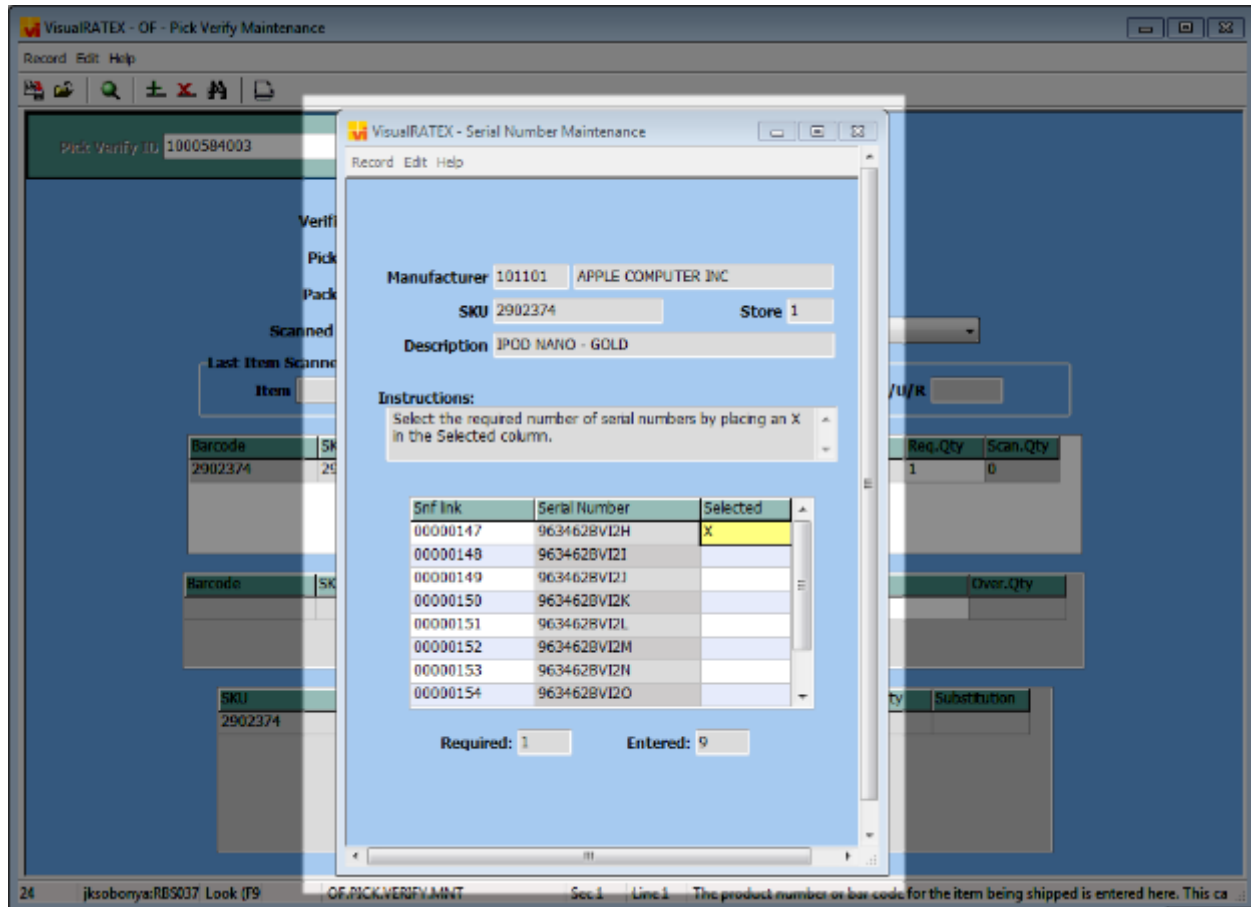
If “Yes” is selected, the used book is scanned; the new book on the verification screen can be ignored since it is no longer applicable. The sales order is updated with the used book and the order total is adjusted. If “No” is selected, the used book not scanned; it is considered “unexpected” and should not be packed for shipment. An exception report will print when the pick verification record is saved.

## SERIALIZED ITEM FULFILLMENT (GM)

Bookstores may decide to offer serialized items (i.e. computers, monitors, Apple products) on eRATEX. Because these items are typically serialized in VisualRATEX, a required step during fulfillment is to select a serial number for these products.

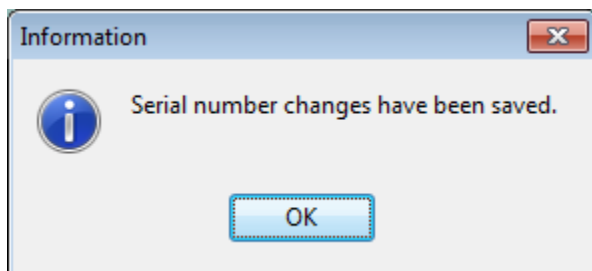
## PICK VERIFYING

During Pick Verify, when a serialized item is scanned, a Serial Number Maintenance screen will display. Select a serial number from the list by placing an “X” in the Selected column, as shown below:

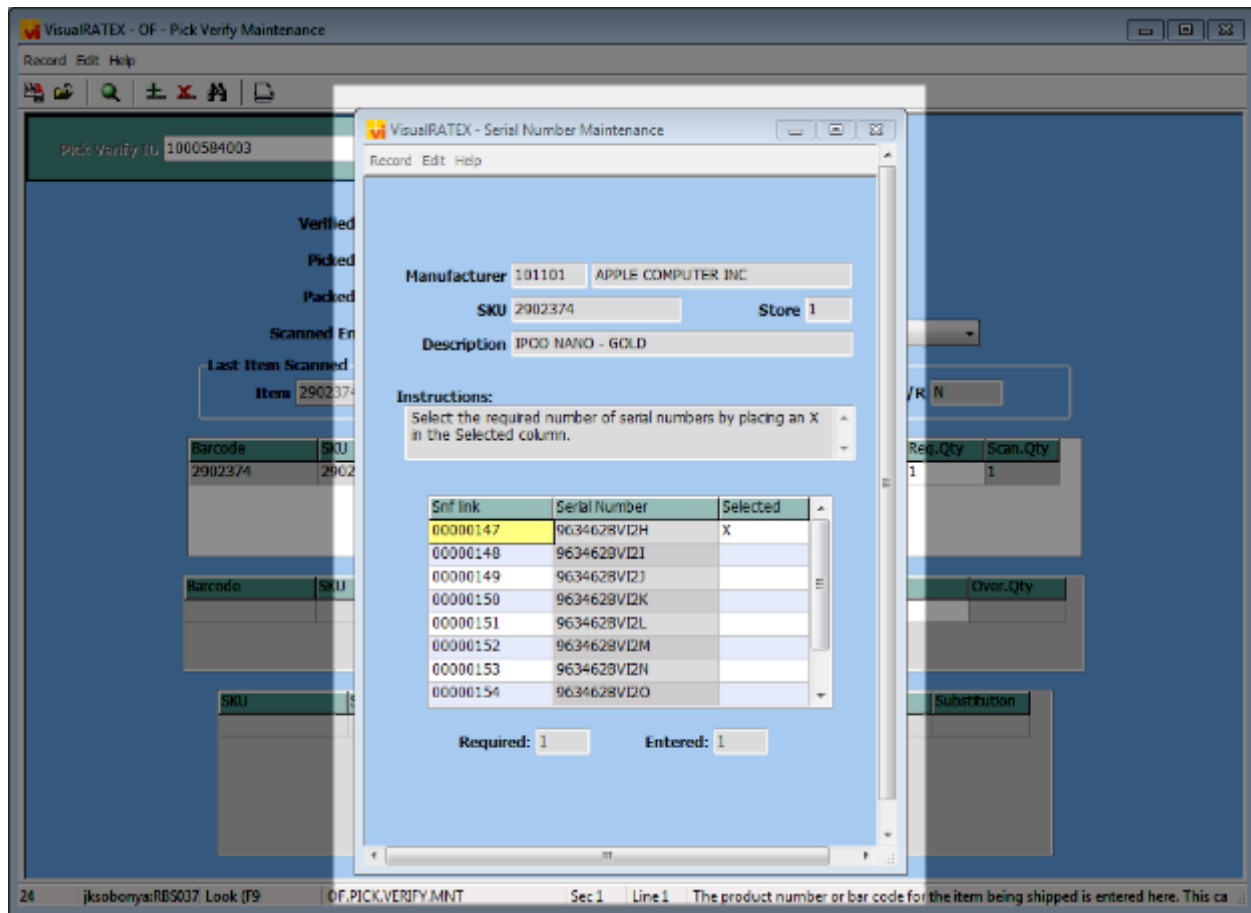


*Pick Verifying a Serialized Item*

Press F10 to save the serial number selection. The following message will display:



When finished verifying products, press F10 to save and print the packing list. The Serial Number Maintenance screen will display again, where you can verify that the correct serial number was selected:



*Pick Verifying a Serialized Item*

If necessary, you can choose a different serial number, or simply press F10 without making any changes. The packing list will print. The serial number(s) will print on the packing list below the item description.

If a serialized item needs to be canceled, do not scan the serialized item during pick verification. Scan any other items that need to be verified, and press F10. The Serial Number Maintenance screen will display. Press F10 without making any changes. The serialized item will be backordered, and can be canceled in Sales Order Maintenance.

## GIFT CARD FULFILLMENT

Gift cards that are sold in eRATEX can be fulfilled in Order Fulfillment. A gift card is called a “FEE” in Order Fulfillment:

Key Code	Product	Description	Color	Style	Size	Qty
NONE	00055	ERATEX PEN	500		NA	1
NONE	00055	ERATEX PEN	500		NA	1
NONE	FEE	F.1 Gift Card				1

The gift card SKU must be set up properly in order to display as a FEE in Order Fulfillment. If a web ID displays instead of a FEE, the gift card SKU has not been set up properly. Since the gift card is a FEE, inventory is ignored during the picking process. During Pick List Verification, at the Scanned Entry prompt, enter the Auto Fee Code (ex. G.1) defined on the gift card SKU and press Enter. A screen will display to enter a gift card number:

Shipment

Gift card number	Amount
	10.00

Enter a gift card number and press F10 to save the record and continue the verification of the sales order. A gift card record (POS.GST) will be created along with the sales transaction record (POS.VST) when the sales order is closed.

## EBOOKS

eRATEX and Order Fulfillment supports CafeScribe and CourseSmart eBooks.

In VisualRATEX, an eBook must be set up in Textbook Maintenance with the eBook radio button set to “Yes”, an appropriate eBook binding code, and a UPC code (if applicable). When the eBook record has been defined, it must be associated with the “parent” (hardback/paperback) version of the ISBN, as shown below:

<b>New SKU</b>	9780538734943
<b>Used SKU</b>	2900538734942
<b>eBook SKU</b>	9781111564230

*eBook association with the parent ISBN in Textbook Maintenance*

When the parent ISBN is on a course request, eRATEX will display the new, used, rental (if applicable), and eBook variants:

	<b>NUTRITION CONCEPTS AND CONTROVERSIES, 12TH EDITION</b>	<input type="radio"/> <b>NEW: \$136.00</b>
	Author: SIZER	<input type="radio"/> <b>USED: \$102.00</b>
	ISBN: 9780538734943	<input type="radio"/> <b>RENTAL: \$68.00</b>
	Publisher: Cengage Learning	<input checked="" type="radio"/> <b>EBOOK: \$91.99</b>
	Edition: 12 Copyright: 11	

*eBook variant on the Book List page*

When a student selects an eBook on the Book List page and checks out, the eBook is given free shipping. When the web order is placed, it is automatically processed by Order Fulfillment. The sales order does not need to be picked/pick verified. The eBook on the sales order may briefly have a line status of “Drop Ship” or “DRPS”; this is a line status given only to eBooks during the automatic fulfillment process. During the process, the eBook on the sales order is validated by CafeScribe/CourseSmart, the student’s credit card is charged, and the sales order is closed. If the credit card is not charged successfully, the sales order will decline and will have to be evaluated (see [Declines & Resolutions](#)). If there is a failure trying to validate the eBook, the sales order will be put on customer hold with a line comment of “eBook coupon failure” and will have to be reviewed. If an eBook is ordered with additional items, the eBook will be processed on a separate shipment.

## MANUAL ORDERS

A sales order can be manually entered into Order Fulfillment. This process is optional, as students will use eRATEx to place online orders which are processed through Order Fulfillment. There may be cases where the bookstore needs to place an order on behalf of a student, perhaps for an out of stock item that needs to be ordered, or for an item that is not available for purchase on eRATEx. Creating a manual order may be preferable for some bookstores because it allows for a better “paper trail” because the sales order will record any activity done to the order, notes can be left on the sales order regarding the processing of the order, and so on. There is no e-mail communication with manual orders.

Before a manual order can be entered and processed through Order Fulfillment, some data must be reviewed for accuracy.

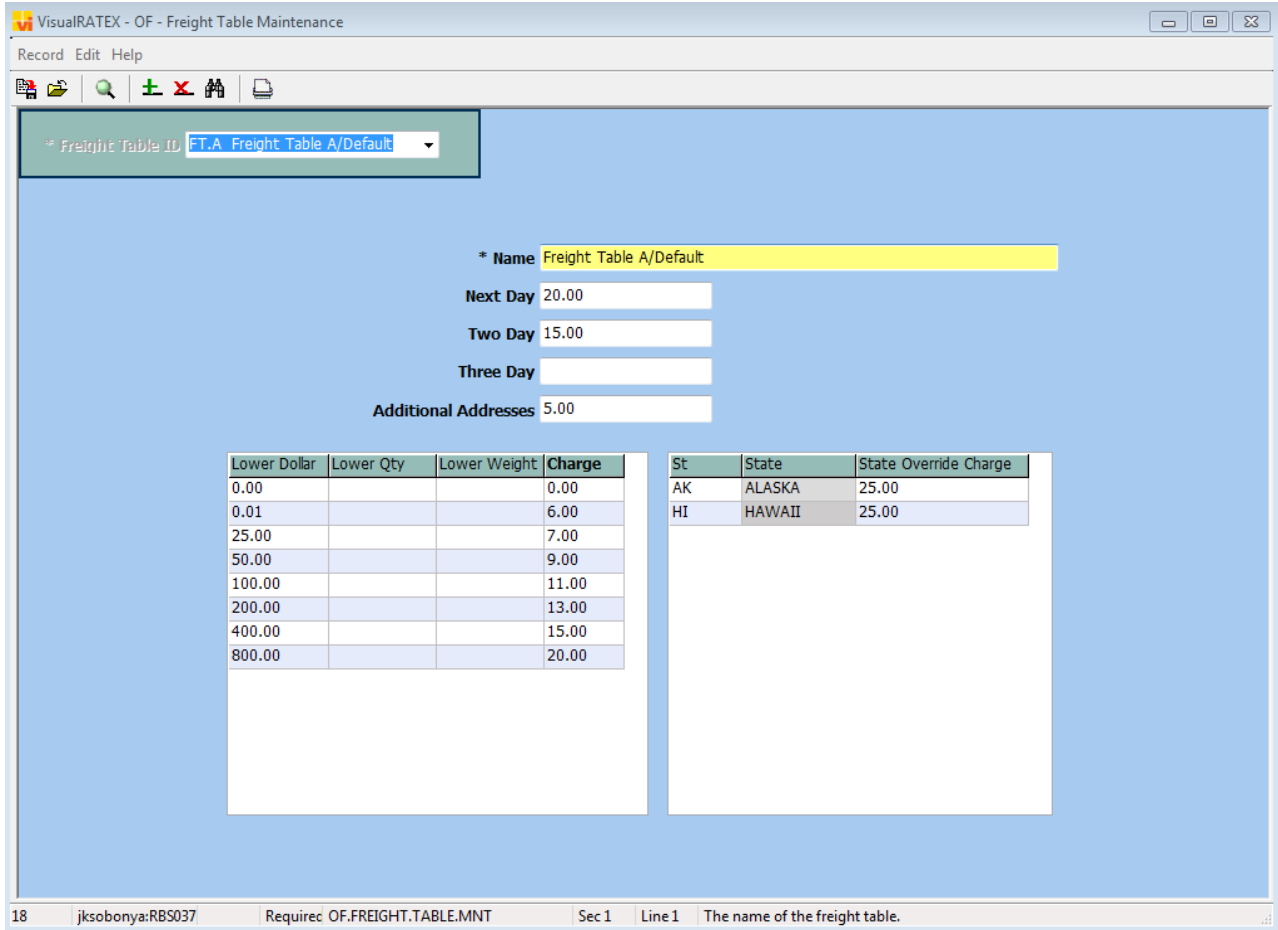
## PAYMENT TYPES

Payment information must be manually entered on a manual order. Payment types are maintained in Order Fulfillment > Maintenance & Setup > Payment Types as well as AV.PARAMETER SALES.ORDER. Web tenders that were set up for online orders should not be used for manual orders. Currently, the payment methods that are supported for manual orders are AR (payment type OA or “On Account”) which functions just like WA or “Web On Account,” and PC (Prepaid Credit Card).

Examples of how to place an order using each payment type will be described in the next section.

## FREIGHT TABLES

Manual orders need the ability to charge freight / shipping charges. To determine what freight to charge, a freight table must be set up. Freight tables are maintained in Order Fulfillment > Maintenance & Setup > Freight Tables, as shown below:



OF.FREIGHT.TABLE.MNT  
Freight Table Maintenance

## RETURNS

Students may wish to return part or all of an online order. If the university bookstore accepts returns, items on a sales order can be returned in POS\*Liberty. The original returns process and the enhanced/modified returns process is explained below.

### RETURNS – ORIGINAL TWO-STEP PROCESS

Returns was originally a two-step process. If a student wanted to return their online order and wanted their credit card to be refunded, one would have to log onto the CyberSource Business Center account, find the order, and refund the payment. Then, they would have to do a return at POS\*Liberty to record the return and increment the stock.

RBS has modified this process beginning with the .16 release of 37A to make the returns process more efficient.

## RETURNS – ENHANCED/MODIFIED ONE-STEP PROCESS

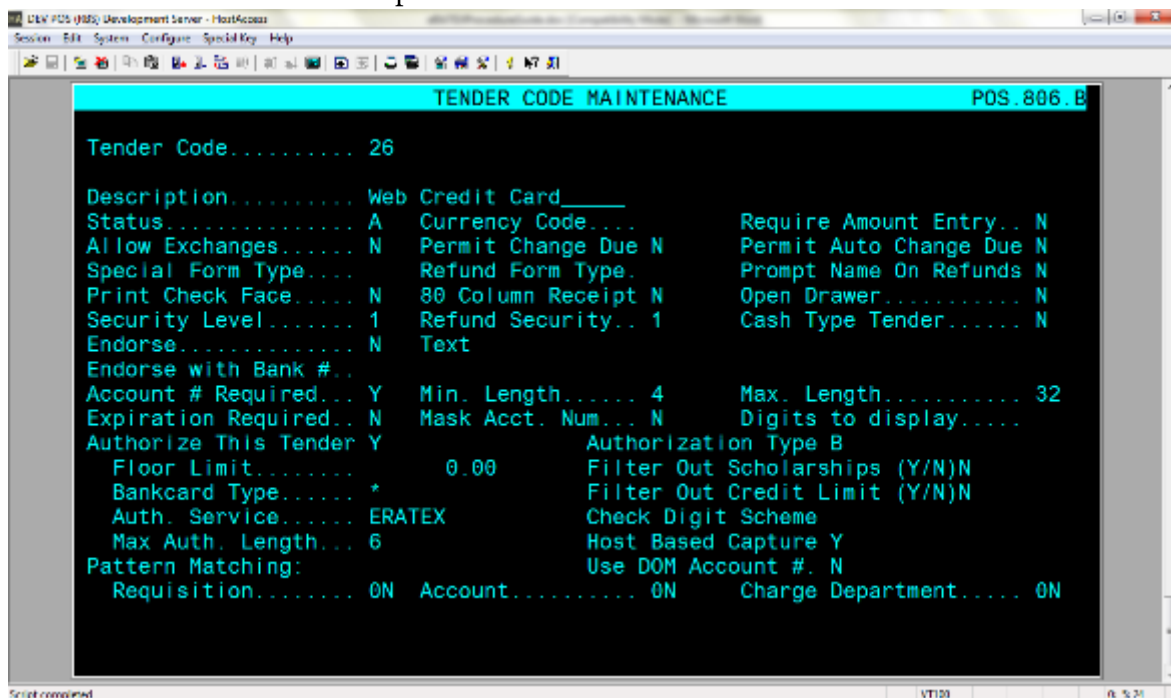
Beginning with VisualRATEX release 37A .16, a “web return” can occur in POS\*Liberty in a single step instead of two. For a credit card web return, POS\*Liberty will make a call out to CyberSource and refund the credit card at the completion of the web return. If a different web tender was used on the sales order (gift card, student card, AR), the applicable web tender can be used during the web return.

In order for web returns to work properly, the web tender and register setup must be reviewed.

## WEB TENDER & REGISTER SETUP

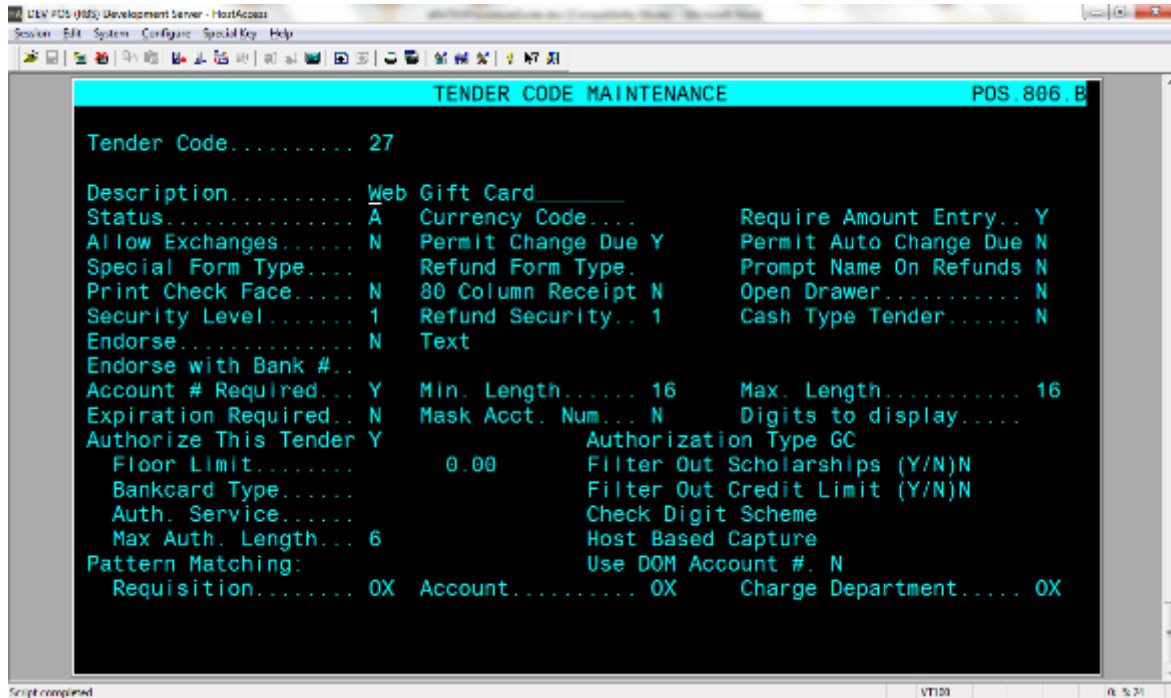
For web returns to work properly, the web tenders and registers must be reviewed for data accuracy.

WC (Web Credit Card tender) – RBS has modified the WC tender to make a call to CyberSource to refund payment when a return is processed in POS\*Liberty. The returns process treats the WC tender like a “bank card service”, and the web credit card tender must have the “Authorization” set to “Y” and the auth service set to “ERATEX” as shown in the screen capture below.



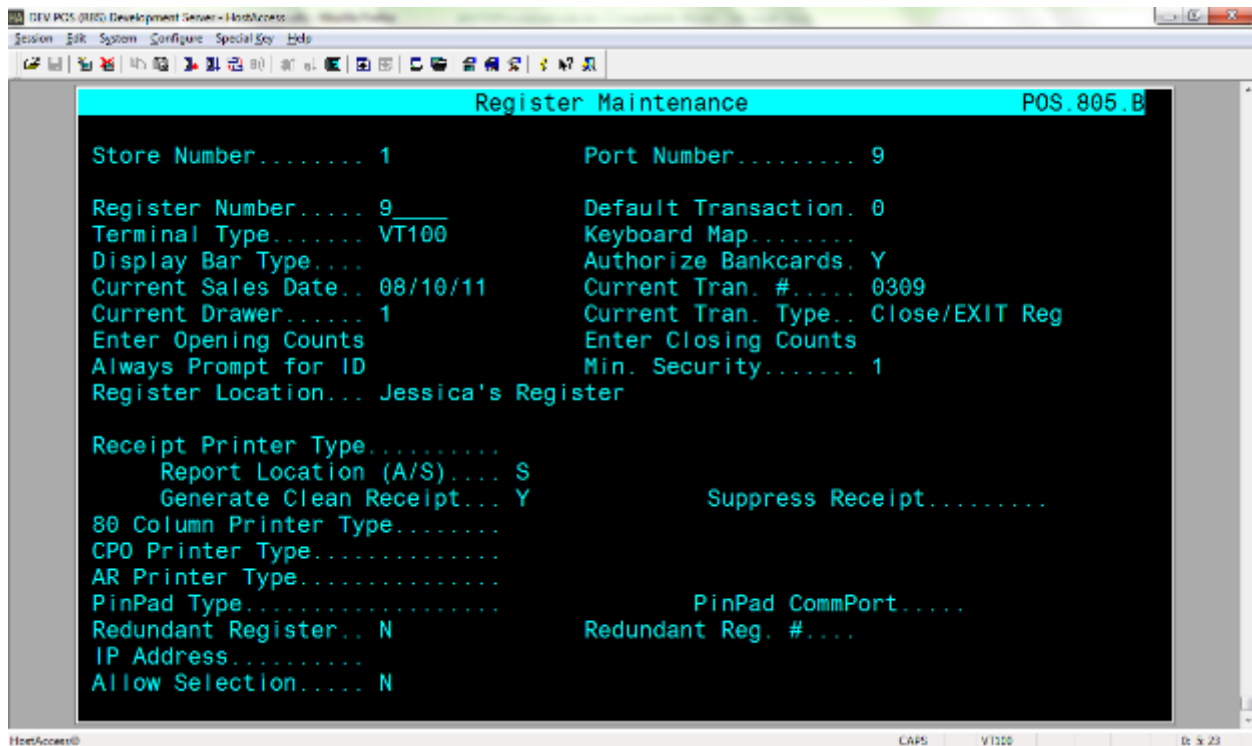
WG (Web Gift Card tender) – the web gift card tender must have an Authorization Type of “GC” in order to do a web gift card return, as shown in the screen capture below.





The remaining web tenders (WA and WS) do not require any changes.

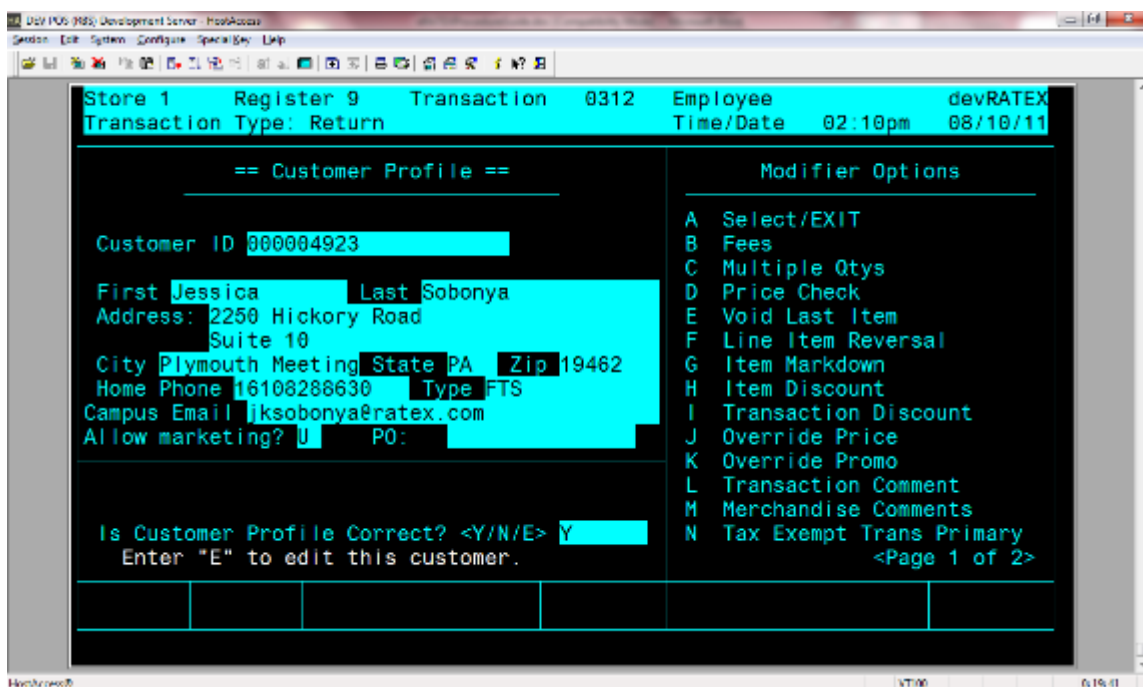
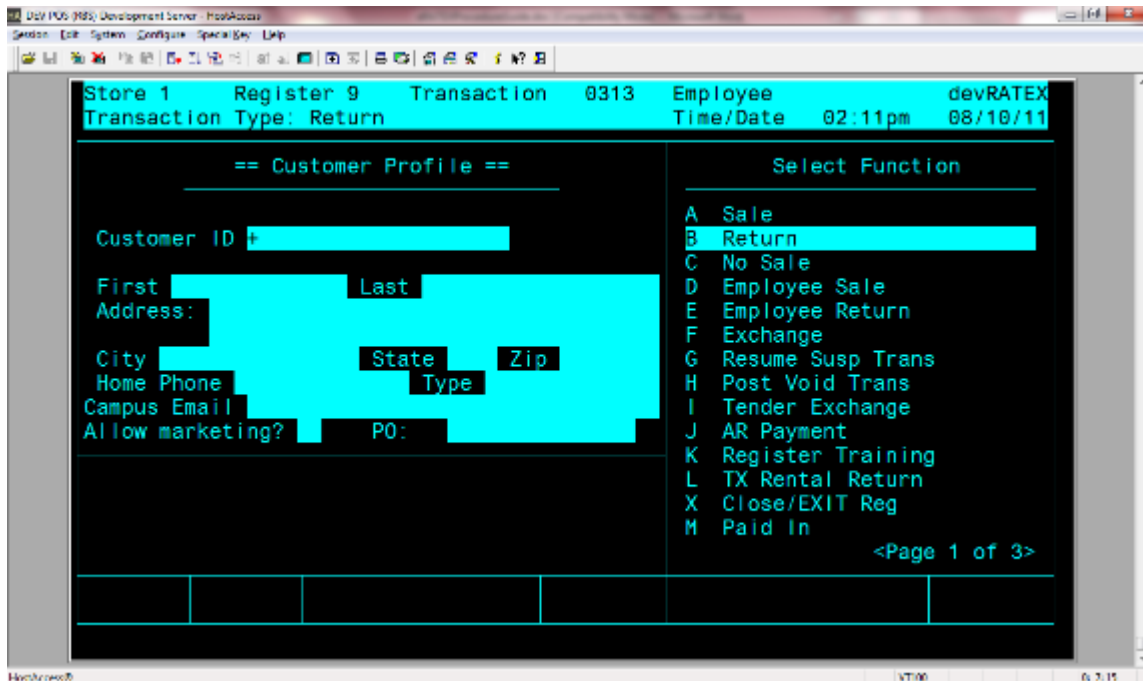
A web return can be performed on any register in the bookstore; the register setup must have “Authorize Bankcards” set to Y, otherwise, web credit card returns will not work properly.



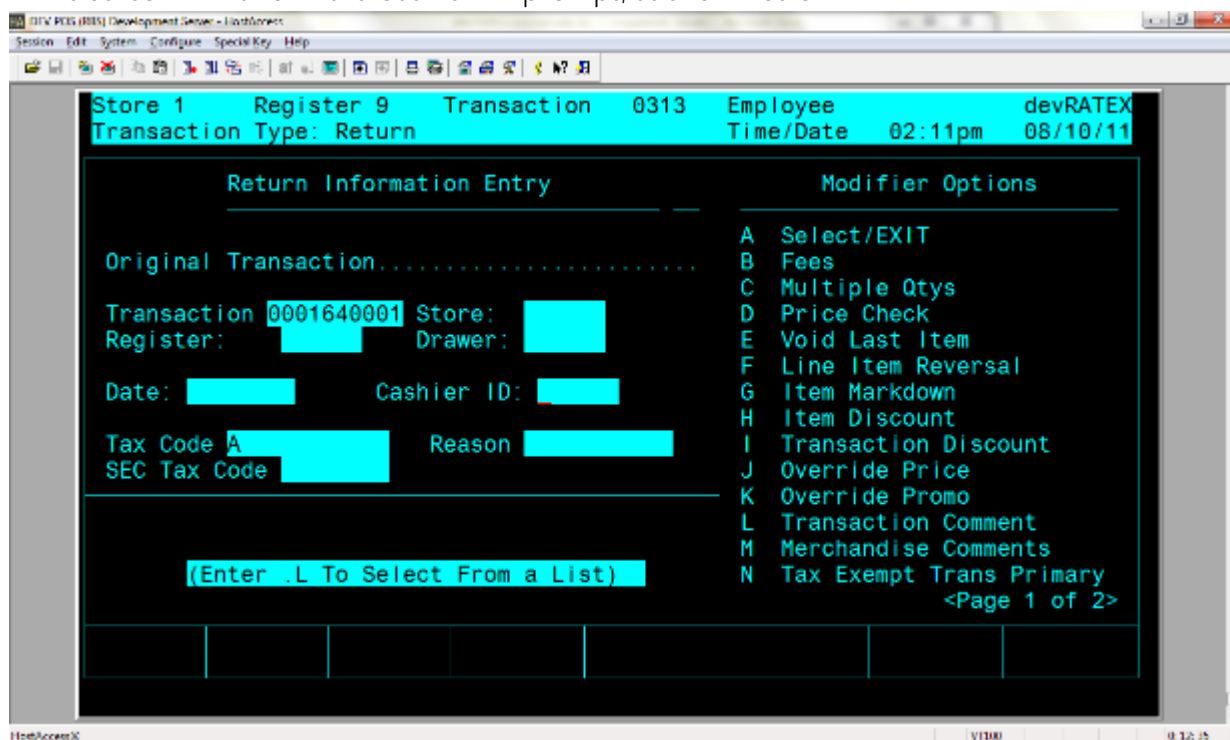
Once this setup is verified & complete, a web return can be performed in POS\*Liberty.

## RETURNS PROCESS

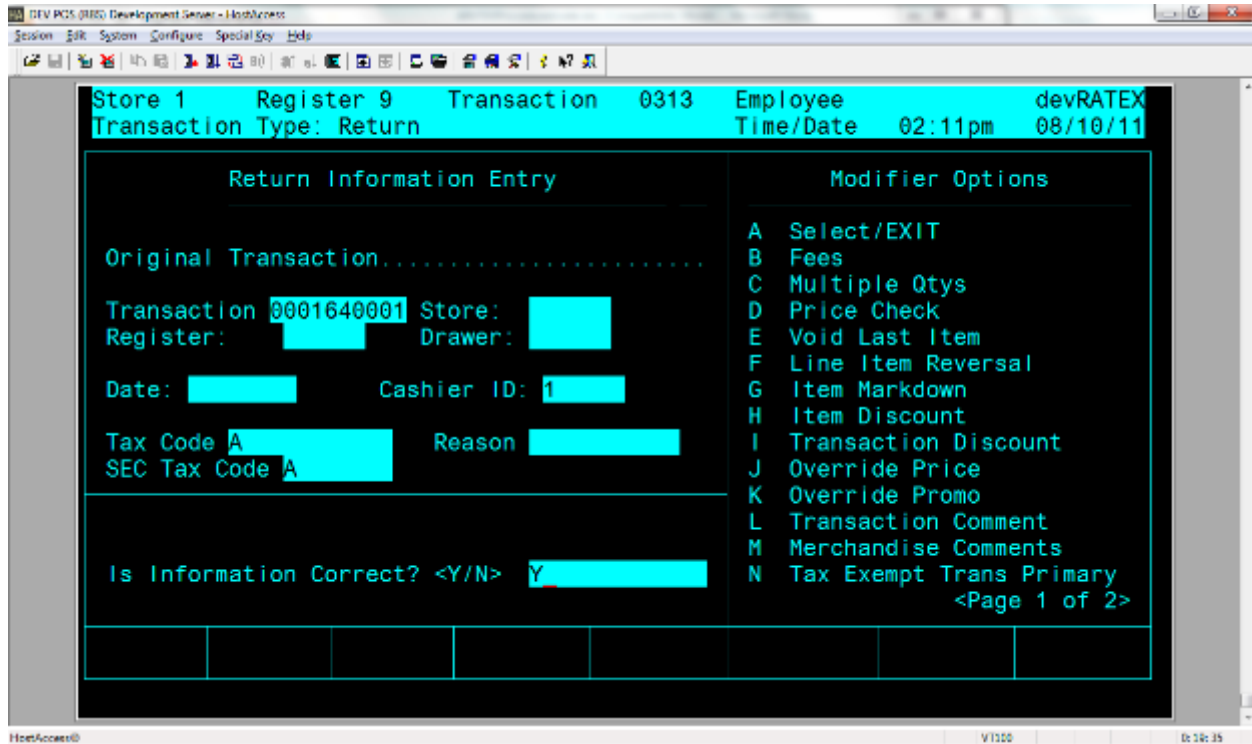
In POS\*Liberty, after logging into a register, select Return, enter the customer number, and verify that the customer information is correct:



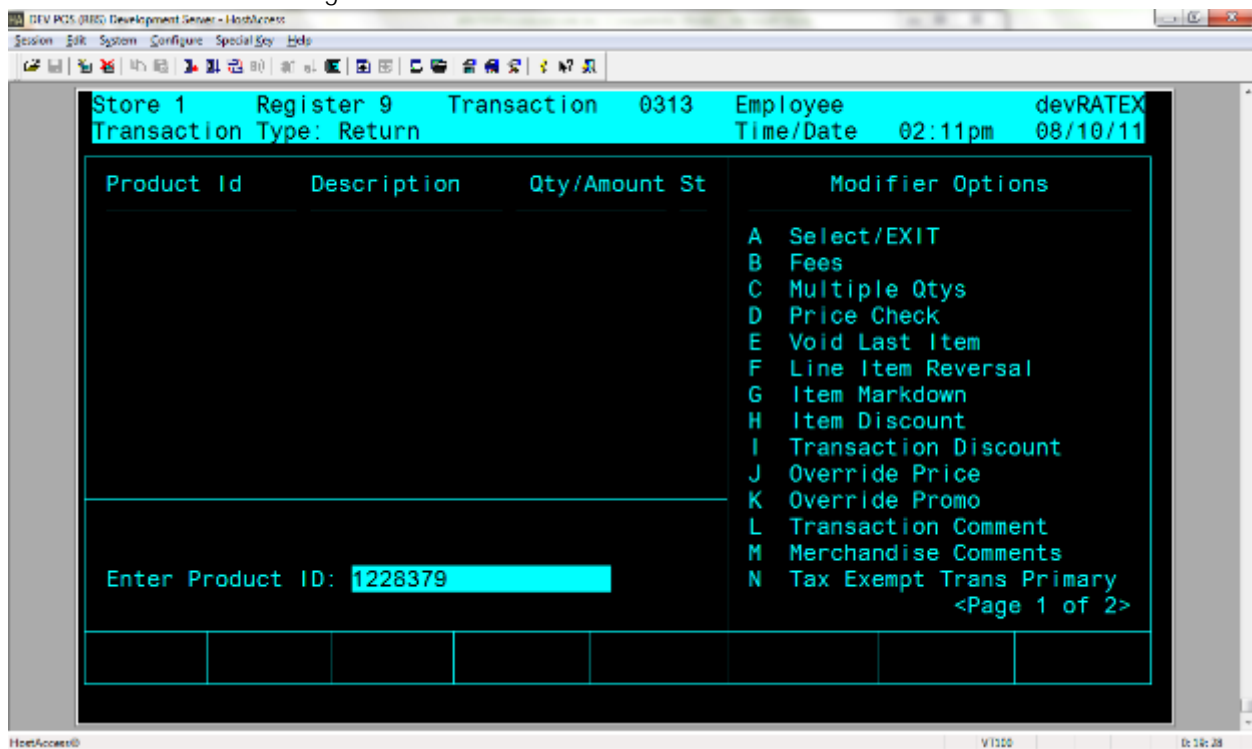
Next, in the Return Information Entry screen, enter the 10 digit sales order number, which can be found on the packing list. The logic will look up the POS.VST transaction record from a new attribute in the sales order file, and read the data for several fields on the screen (Store, Drawer, Register, Tax Code), so there is no need to fill them in. The cursor will land in the Cashier ID prompt, as shown below:



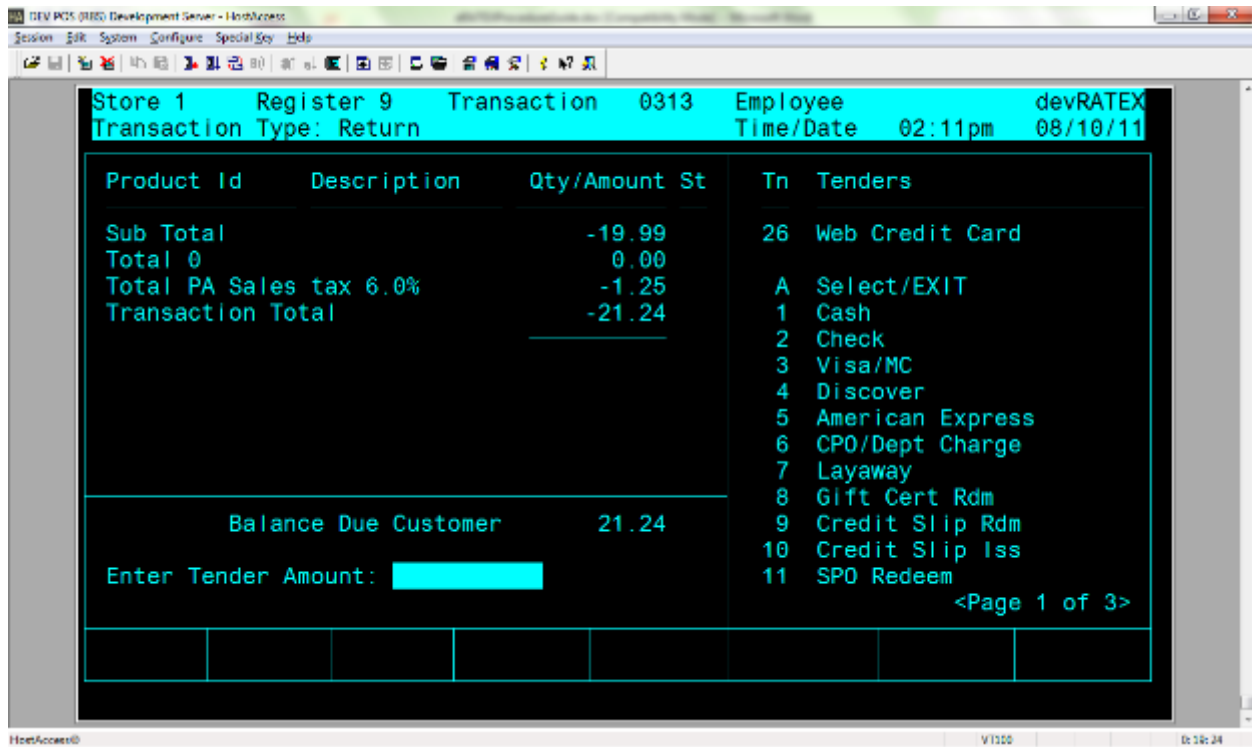
Select a Cashier ID, a Reason (if applicable), and verify that the information is correct:



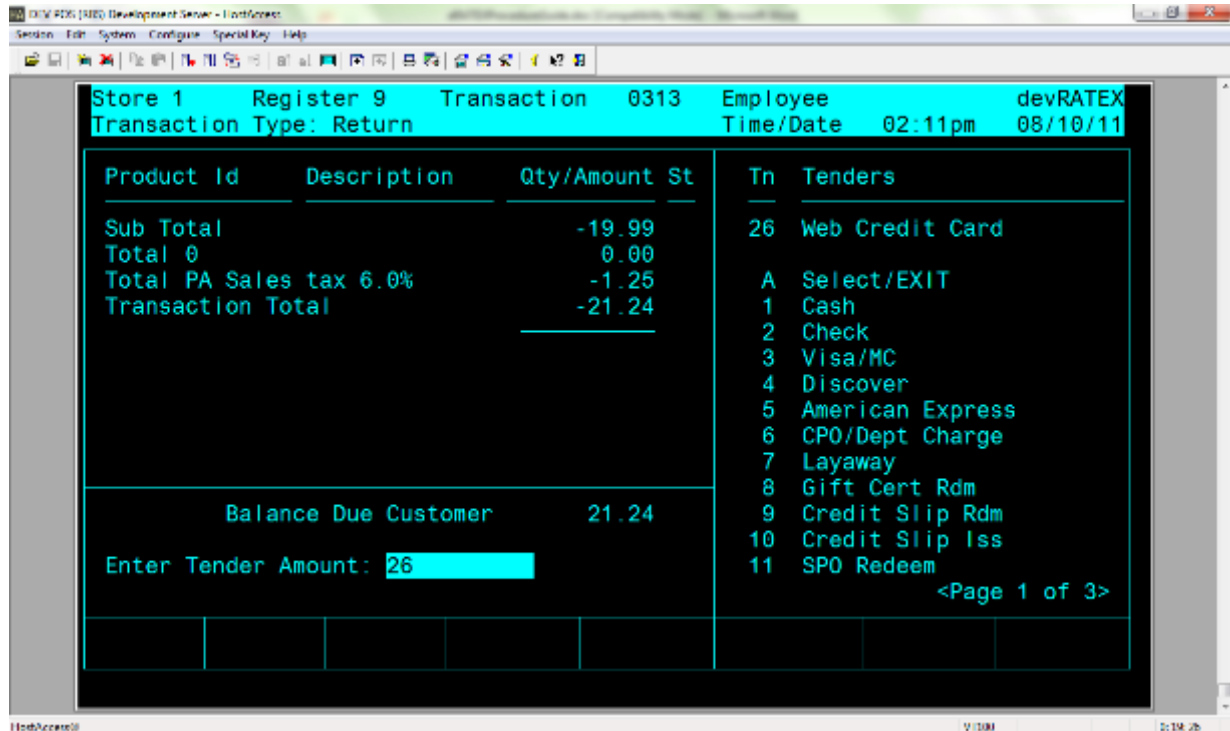
Next, enter the item that is being returned:



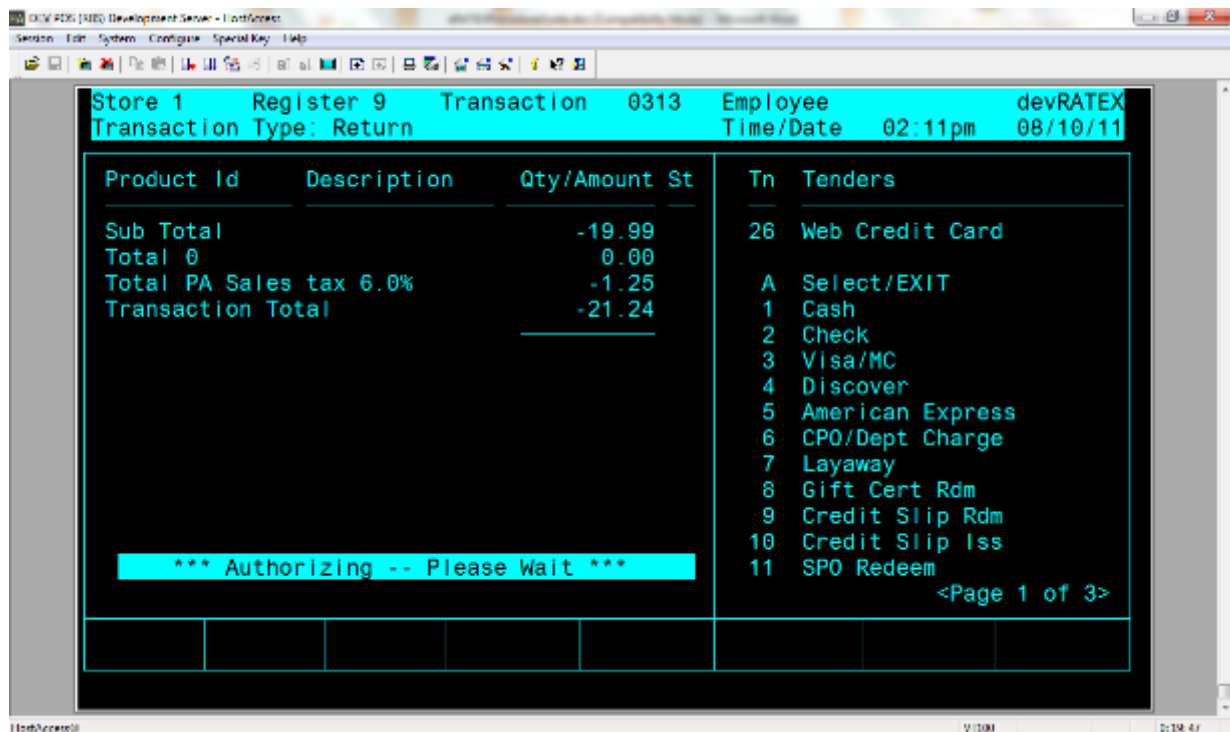
When finished adding items to return, total the transaction by pressing the SHIFT key and “+”. The total amount to be returned to the customer is displayed:



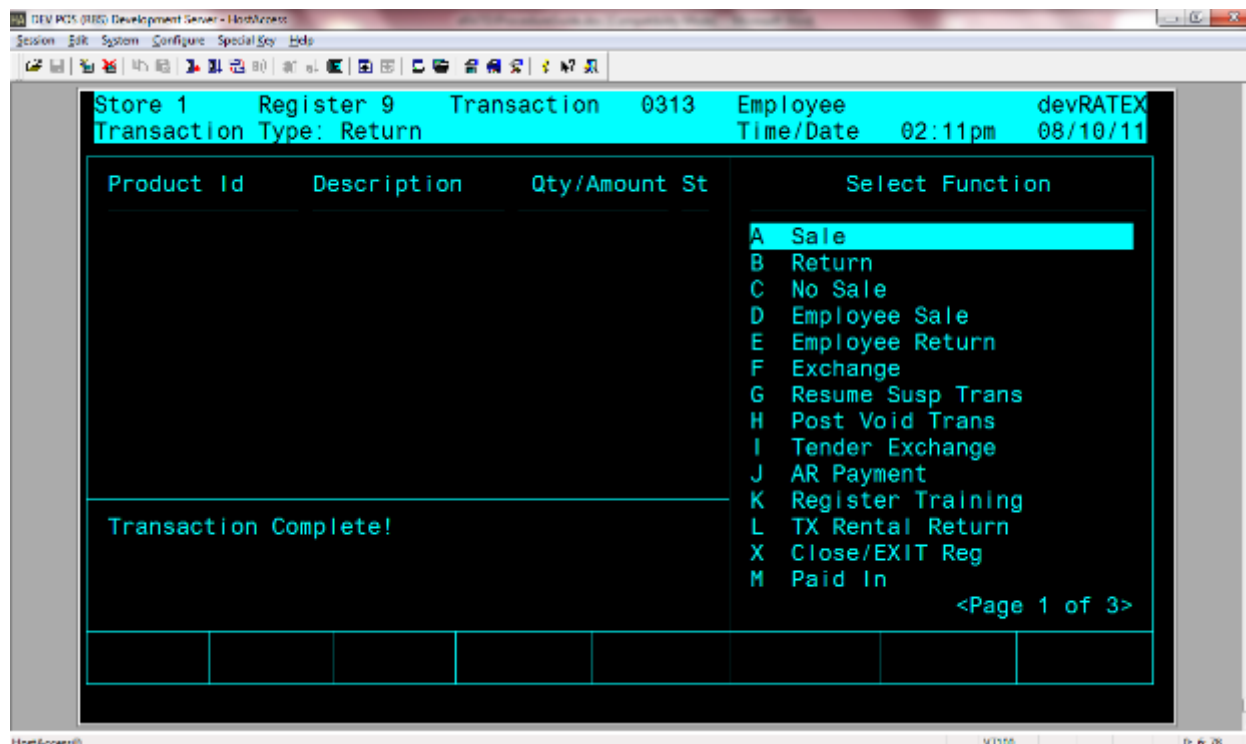
Enter the tender amount, or press the ENTER key to auto-populate the entire total, then select the tender. Since this is a web return going against a credit card, 26 will be entered, which is the WC tender:



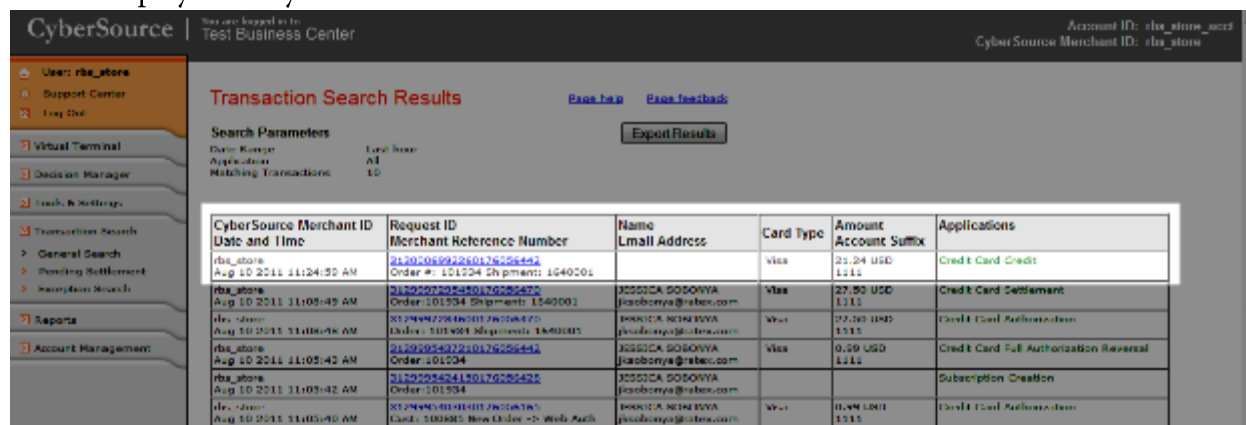
After entering the tender, press the ENTER key. The screen will show an authorizing message as the call is made to CyberSource to refund the credit card:



If the refund is successful, the transaction will complete:



The refund is displayed in CyberSource as a “Credit”:



If the return is NOT successful, check the tender settings, register settings, and CyberSource for any error messages, and [Contact Us](#).

Performing a return for a different web tender (WG, WS, WA), is identical to the above process. The refunds will go against the gift card, student card, or AR account, whichever is applicable to the return that is being processed.



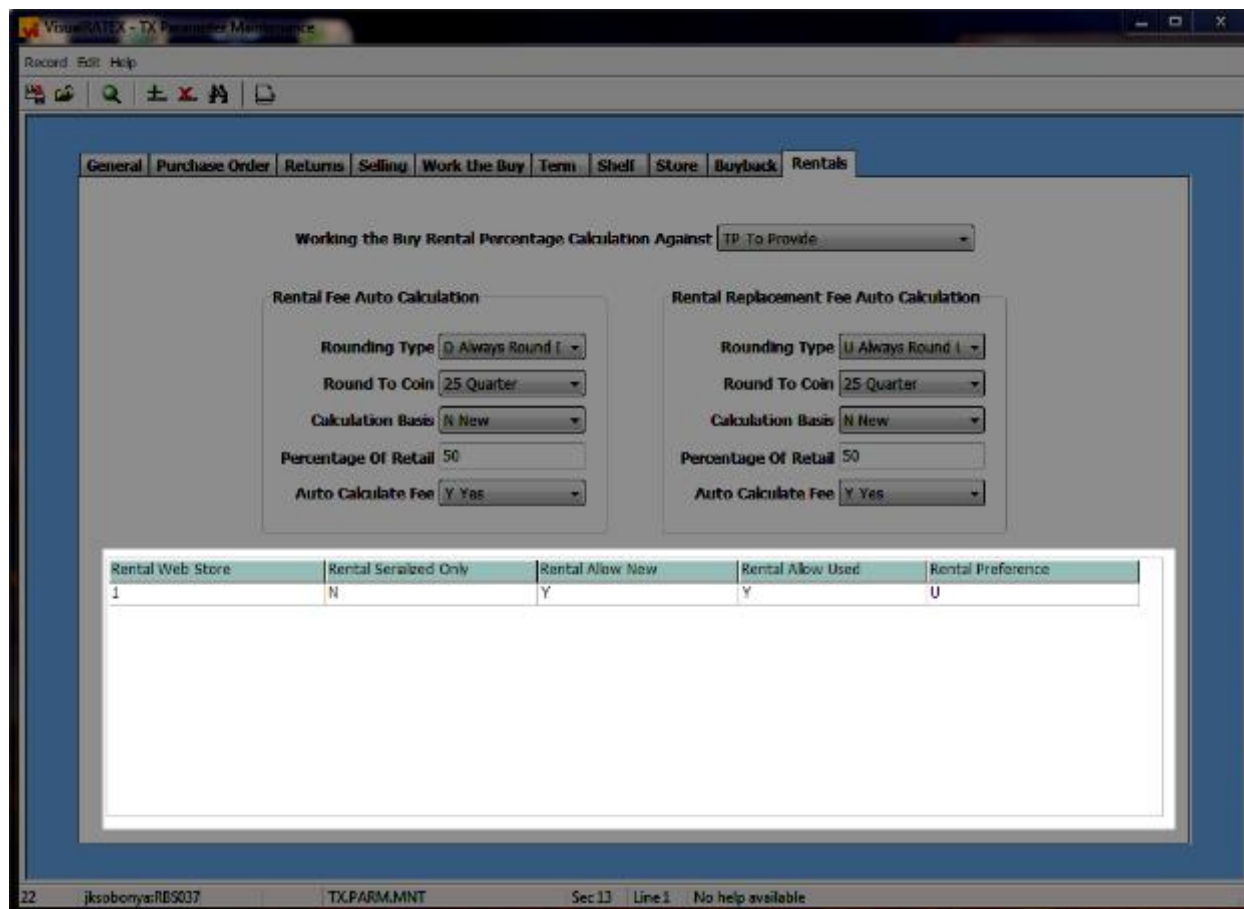
# TEXTBOOK RENTALS

Beginning with VisualRATEX 37A .16, textbook rentals can be bought and fulfilled in eRATEX and Order Fulfillment. Rentals can be fulfilled in one of two ways: serialized or non-serialized.

## VISUALRATEX PARAMETERS

Before textbook rentals can be sold on eRATEX, the bookstore must decide how to track rental inventory. Is the rental stock “serialized”, meaning specific stock is allocated for rental books, or is the rental stock “non-serialized,” meaning new and used stock will be converted “on the fly” to rental stock?

This decision is very important and affects how rentals will be treated in eRATEX and Order Fulfillment. In Text Parameter Maintenance, Rentals tab, there is a grid that must be defined appropriately so eRATEX and Order Fulfillment will know whether or not to treat rental textbooks & inventory as serialized or non-serialized:



TX.PARM.MNT  
Text Rental Parameters grid



Rental Web Store should be defined with a web store number. For serialized rentals, enter “Y” in the Rental Serialized Only column. The rest of the columns are not applicable to serialized rentals and can be ignored. For non-serialized rentals, enter a “N” in the Rental Serialized Only column. To use new stock and used stock for “on the fly” rental conversions, enter a “Y” in the Rental Allow New and Rental Allow Used columns. Lastly, in the Rental Preference column, select used books or new books for the “rental preference.” This will be discussed further in the rental order processing section of this document.

**Tip:**

If using non-serialized rentals, Rental Allow New and Rental Allow Used cannot BOTH be “N”. At least one value must be “Y”.

Once the VisualRATEX parameters are properly defined to use serialized or non-serialized rentals, some eRATEX parameters must be defined.

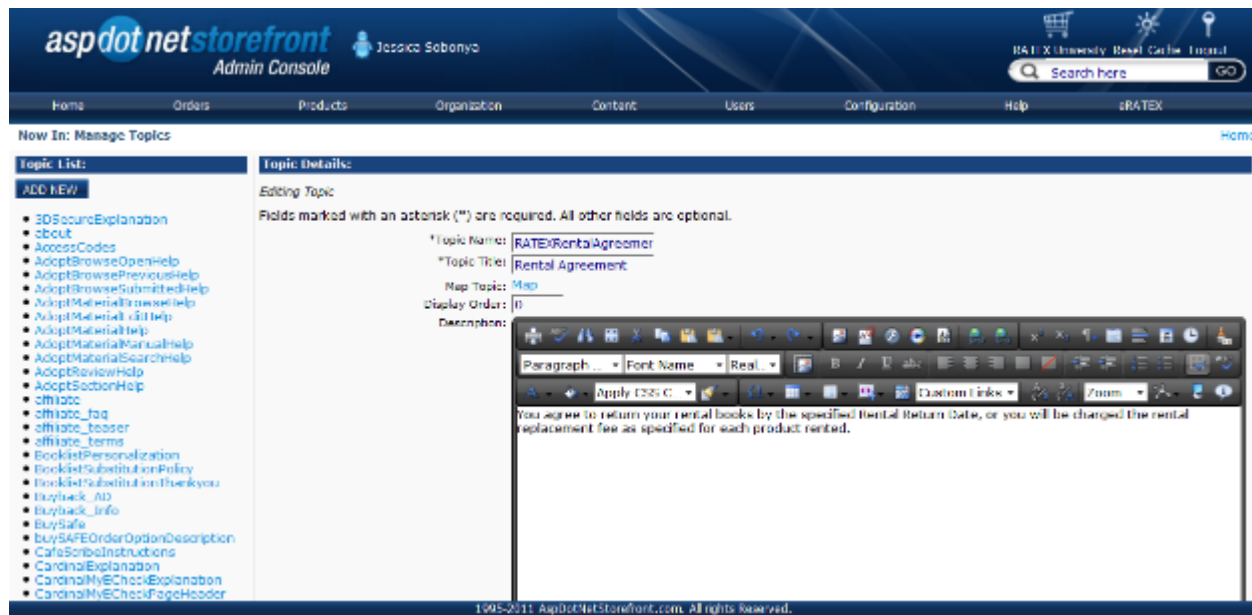
## eRATEX PARAMETERS

In eRATEX, there are a few settings that must be defined in order to sell textbook rentals. In the eRATEX Admin under Faculty > Modify Terms, each term that will be selling textbook rentals must be linked to a Rental Topic Agreement and Rental Return Date, as shown below:

Term ID	VR Term Code	Term Name	Term Status	Rental Agreement Topic	Rental Return Date	University Term Code
147	131	Term 1	Hidden			
146	124	Fall 2012	Current			
145	123	Summer 2012	Prior	RATEX\RentalAgreement	09/01/2012	
138	122	Spring 2012	Prior	RATEX\RentalAgreement	04/27/2012	

This logic mimics similar logic in the POS\*Liberty system where a Rental Agreement and Rental Return Date is defined and printed on the customer receipt. In eRATEX, when a customer places an order, they must agree to the Rental Agreement at checkout; if they agree, the Rental Agreement and Rental Return Date will be printed on the Order Confirmation e-mail.

The Rental Agreement is a Topic that can be edited/maintained in the Misc > Topics area of the eRATEX Admin:



Once the eRATEx parameters are properly defined, rental books & course requests can be built in VisualRATEx & sent to eRATEx.

## TEXTBOOKS & COURSE REQUESTS

Rental textbooks must be created in Textbook Maintenance and linked to a course request in Enter/Maintain Course Requests in order to be bought in eRATEx.

Below are general guidelines for this setup:

- Any rental textbook (serialized or non-serialized) must have the “Rental” radio button in Textbook Maintenance set to “Yes.” The “Rental” radio button tells eRATEx that the textbook is a Rental textbook; eRATEx will display the “rental” variant in addition to the “new” and “used” variants when the book is added to a course request in VisualRATEx.
- Regarding how the inventory will be tracked in eRATEx:
  - If serialized -- inventory in eRATEx will be tracked based on rental stock on hand.
  - If non-serialized -- inventory in eRATEx will be tracked based on new and used stock on hand and the Rental Allow New and Rental Allow Used parameter settings in Text Parameter Maintenance. (Ex. If a book has 5 new and 10 used on hand in VisualRATEx, and Rental Allow New & Used are Y, eRATEx will calculate available stock as 5 new, 10 used, and 15 rental.)

When a course request with a rental book is uploaded to eRATEX, the Book List page will display the rental book as follows:

The screenshot shows the eRATEX interface for a course. At the top, there is a navigation bar with 'Home', 'Categories', 'Textbooks', 'Faculty', and 'Customer Service'. A search bar is on the right. Below the navigation is a progress indicator with three steps: '1 Select Courses', '2 Choose Books', and '3 Check Out'. The main content area is titled 'Courses' and shows details for 'NUTR 100' at 'FALL 2011 - RATEX University - NUTR 100 - Section 1 - NUTRITION'. The instructor is 'SOBONYA'. Under 'Required Materials', there are two books listed with their rental options:

Required Materials	select all: <a href="#">new</a>   <a href="#">used</a>   <a href="#">rental</a>	Allow substitution? (required)	unselect item
<b>NUTRITION FOR HEALTHY LIVING</b> SCHIFF / ISBN: 9780077224851	<input type="radio"/> NEW: \$99.75 <input type="radio"/> USED: \$70.00 <i>Out of stock</i>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
<b>NUTRITION, HEALTH &amp; SAFETY FOR YOUNG CHILDREN (W/ACCESSCODE)</b> SORTE / ISBN: 9780131381209	<input type="radio"/> NEW: \$105.00 <i>Out of Stock</i> <input type="radio"/> USED: \$78.75 <i>Out of Stock</i> <input type="radio"/> RENTAL: \$52.50	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/>

At the bottom right of the course details, there is a 'Your Cart' section showing '( no items )' and an 'Add Selected to Cart' button.

eRATEX

Serialized Rental Textbook on Book List Page

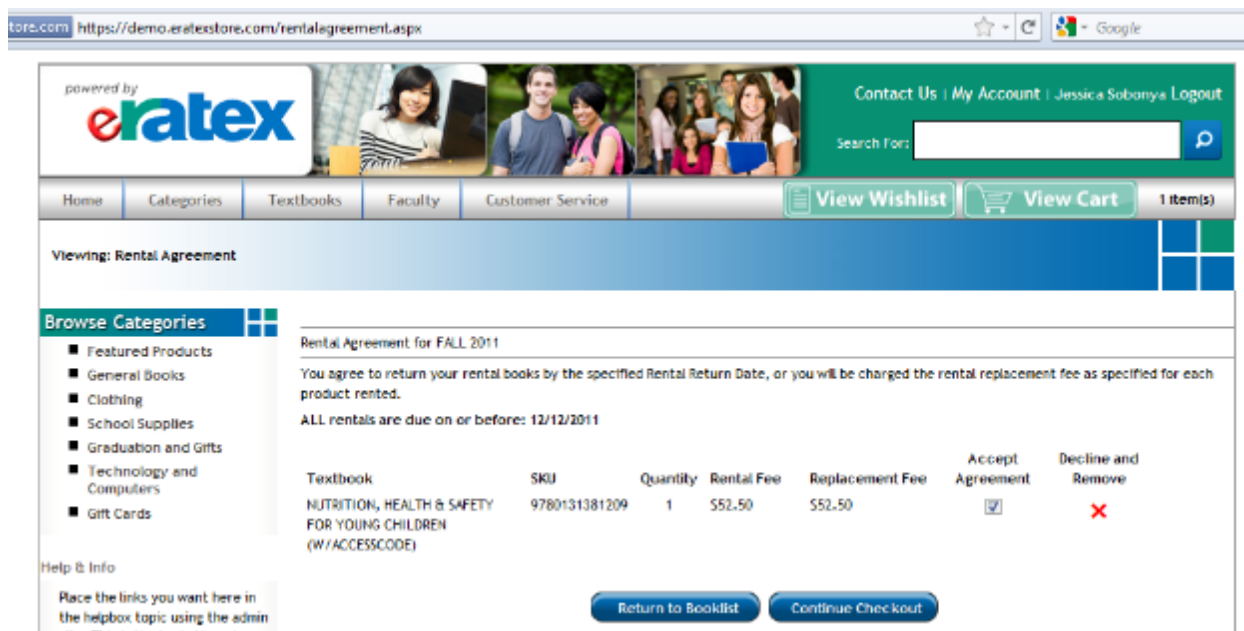
The student can then select the rental textbook and checkout.

Tip:

When a rental textbook is selected on the Book List page, the Allow Substitution is automatically set to "No" and cannot be changed by the user. Rentals cannot be substituted in eRATEX.

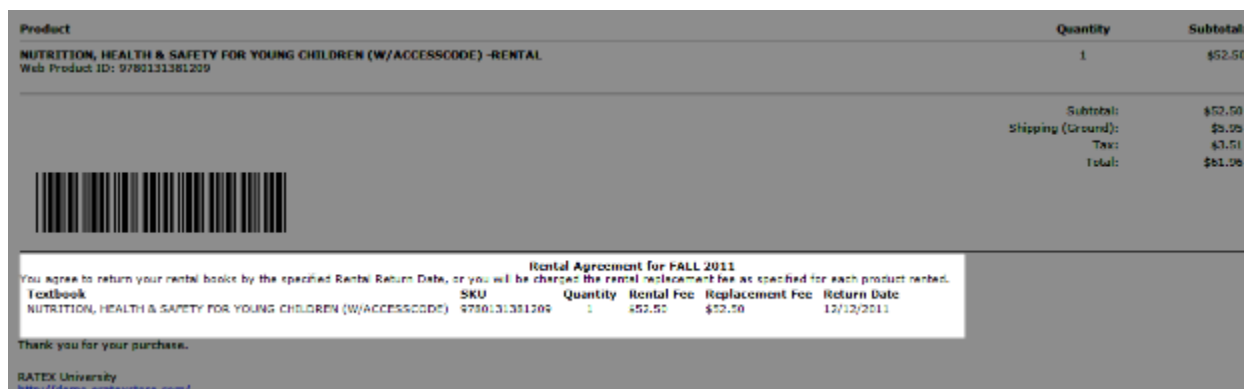
## eRATEX CHECKOUT

When a student purchases a rental textbook on eRATEX, the student must accept the Rental Agreement at checkout, as shown below:



*eRATEx  
Rental Agreement at Checkout*

If the student does not accept the Rental Agreement, the rental textbook will be removed from their cart. If the student accepts the Rental Agreement, they can continue checkout as normal. When checkout is complete, the Rental Agreement, including the Rental Fee, Replacement Fee, and Return Date, is appended to the Order Confirmation e-mail:



*Order Confirmation E-mail*

Once the order has been placed, it will be processed through Order Fulfillment. Serialized rentals and non-serialized rental orders will be discussed in two separate sections below.

## ORDER FULFILLMENT - SERIALIZED RENTALS

When an order is placed for a serialized rental textbook, the textbook will display as an “R” - Rental on the sales order:

Customer ID	00000209	Name	Jeff Zaycek	Phone	6108288630	Email	JEFFZ@RATEX.COM		
Item Link	Description	Qty	N/U/R	System Flag	Retail	Line status	Shipment	Tax	Ext Retail
9780132364522	COLLINS / CALCULUS EARLY TRANSCENDNTL&S/...	1	R	TX	94.25	RDPK	001	0.00	94.25

Rental stock on hand will be checked; if there is adequate rental stock on hand to fulfill the order, the sales order can be picked.

## PICKING

When the sales order is picked, rental stock will be decremented and the pick list will show that the textbook that was picked was a rental, as shown below:

Customer ID: 000004923 Pick Slip Page 1 of 1  
 Customer Name: Sobonya, Jessica  
 Customer Phone: 610-828-8630  
 Customer Email: jksobonya@ratex.com

Picked By: \_\_\_\_\_

Sales Order: 1000217	Priority: Normal	Date	Time
Shipment ID: 1000217001	Shipped Via: UPS - Ground	11 JUL 2011	04:40pm

Shipment Notes :  
.....

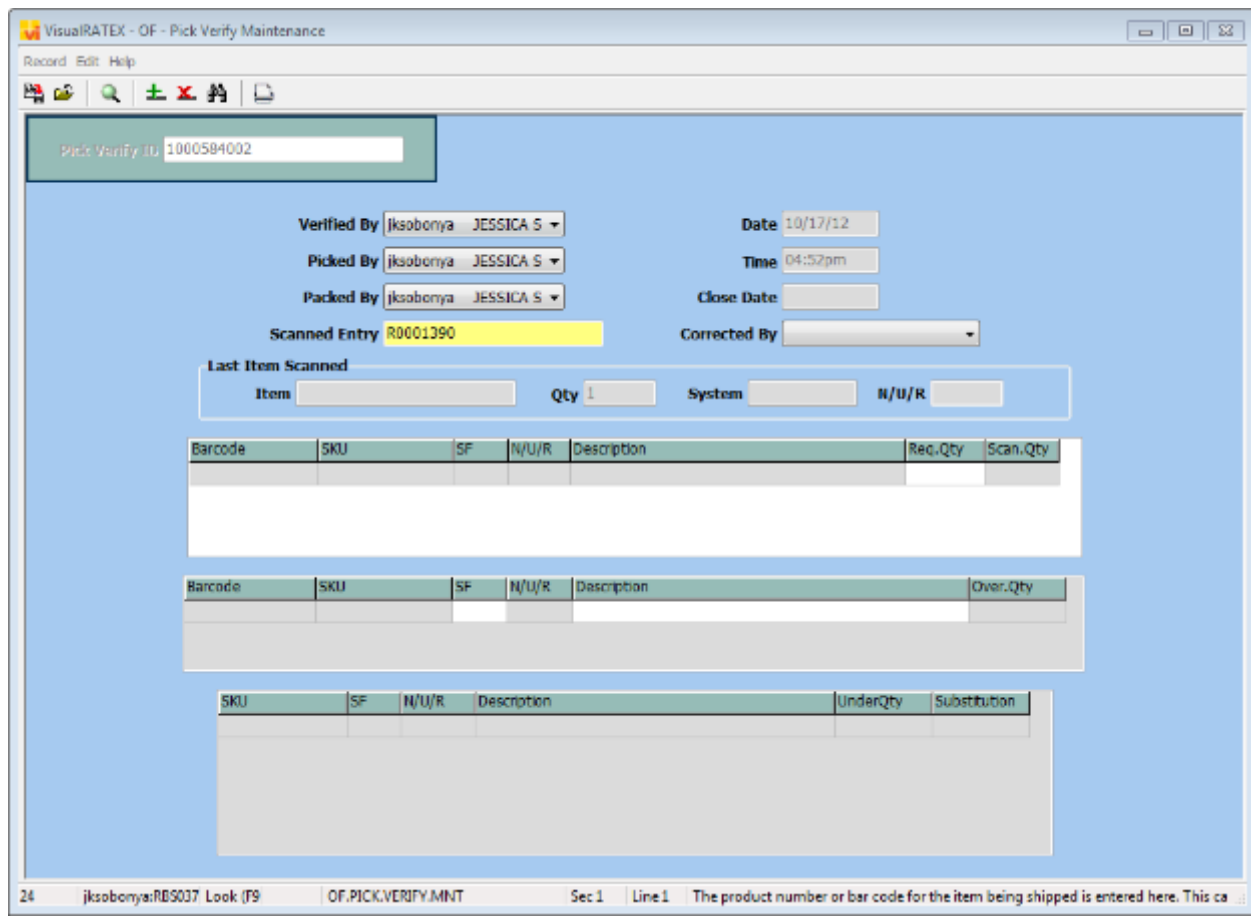
Location	Picked	Qty	SKU	Web ID	N/U/R	Size	Description	Price	Sub
		1	9780131381209	Text	Rental		SORTE - NUTRITION, HEALTH & SAFETY FOR YOUNG CHILDREN (W/ACCESSCODE)	52.50	N

Stock Information			
	Floor	Other	Location
New	0		
Used			
Rental	9		
<b>Totals</b>	<b>9</b>	<b>0</b>	<b>9</b>

Pick List & Stock Information for ISBN 9780131381209


## PICK VERIFYING

To pick verify a serialized rental textbook, a rental serial number MUST be scanned. A rental serial number is the only acceptable option for pick verifying a rental textbook. If the new ISBN or used ISBN is scanned, it will be rejected.



*OF.PICK.VERIFY.MNT  
Pick Verifying a Serialized Rental Textbook*

The packing slip that the customer will receive will display information stating that the textbook is a rental and that it must be returned at the end of the rental program to avoid paying the rental replacement fee.

Packing Slip							
Internet Order 110155		Shipment 1000217001		Customer 000004923			
Ship Method UPSG		Priority Normal		7/11/11			
<b>SHIP TO:</b> Jessica Sobonya 2250 Hickory Road  Plymouth Meeting, PA 19462 PHONE:16108288630 FAX:				<b>BILL TO:</b> Jessica Sobonya 2250 Hickory Road  Plymouth Meeting, PA 19462 PHONE:16108288630 FAX:			
Order Qty	Back Order	Shipped	Item No	Description	Price	Amount	
1	0	1	9780131381209	NUTRITION, HEALTH & SAFETY FOR YOUNG CHILDREN (W/ACCESSCODE)	52.50	52.50	
				***Rental*** This book must be returned at the end of the rental program to avoid paying the replacement fee of \$52.50.			

*Packing Slip with Textbook Rental Information*

## SHIPMENT CLOSE

Once the serialized rental textbook order has been pick verified, it can be closed like any other sales order. Upon closing, the following will occur:

- A sales transaction record (POS.VST) will be created which will include rental information
- The textbook rental record (TX.RENTAL) will be updated for the serialized rental that was scanned during pick list verification; the status will be changed from “I” Inventory to “A” Assigned; additional attributes like Customer Rented To, Transaction ID, and Date Rented will also be updated.
- The customer record (CO.CF) will be updated with the applicable rental information. This data can be viewed in Customer Maintenance, Rental tab for the customer who rented the textbook.

## CANCELING ORDERS

A serialized rental textbook sales order can be canceled any stage of the ordering process flow (RDPK, PICK, RDSH). If the sales order is canceled when the line status is PICK, the rental inventory will be properly adjusted. If the sales order is canceled when the line status is RDSH, the rental inventory will be properly adjusted and the rental serial number will be put back into I-Inventory.



## ORDER FULFILLMENT – NON-SERIALIZED RENTALS

When a sales order is placed for a non-serialized rental textbook, the textbook will display as an “R” - Rental on the sales order. The new & used inventory levels will be checked; the sales order will be pickable based on the available inventory and the Rental Allow New, Rental Allow Used, and Rental Preference parameters. (For example, if Rental Allow Used and Rental Allow New are “Y”, Rental Preference is “U”, and there is stock on hand, used stock will be picked & decremented. If Rental Preference is “N”, and there is new stock on hand, new stock will be decremented, etc.)

### PICKING

When the sales order is picked, the new or used stock will be decremented and the pick list will show that the textbook was either new or used. In the below example, the used stock was picked/decremented, as shown below:

**Pick Slip** Page 1 of 1

Customer ID: 000004923  
 Customer Name: Sobonya, Jessica  
 Customer Phone: 610-828-8630  
 Customer Email: jksobonya@ratex.com

Picked By: \_\_\_\_\_

Sales Order: 1000216	Priority: Normal	Date	Time
Shipment ID: 1000216002	Shipped Via: UPS - Ground	11 JUL 2011	06:50pm

Shipment Notes :  
 ~~~~~

| Location | Picked | Qty | SKU           | Web ID | N/U/R | Size | Description                               | Price | Sub |
|----------|--------|-----|---------------|--------|-------|------|-------------------------------------------|-------|-----|
|          |        | 1   | 9780073256528 | Text   | Used  |      | WARDLAW - CONTEMPORARY NUTRITION 6THUPDID | 49.50 |     |

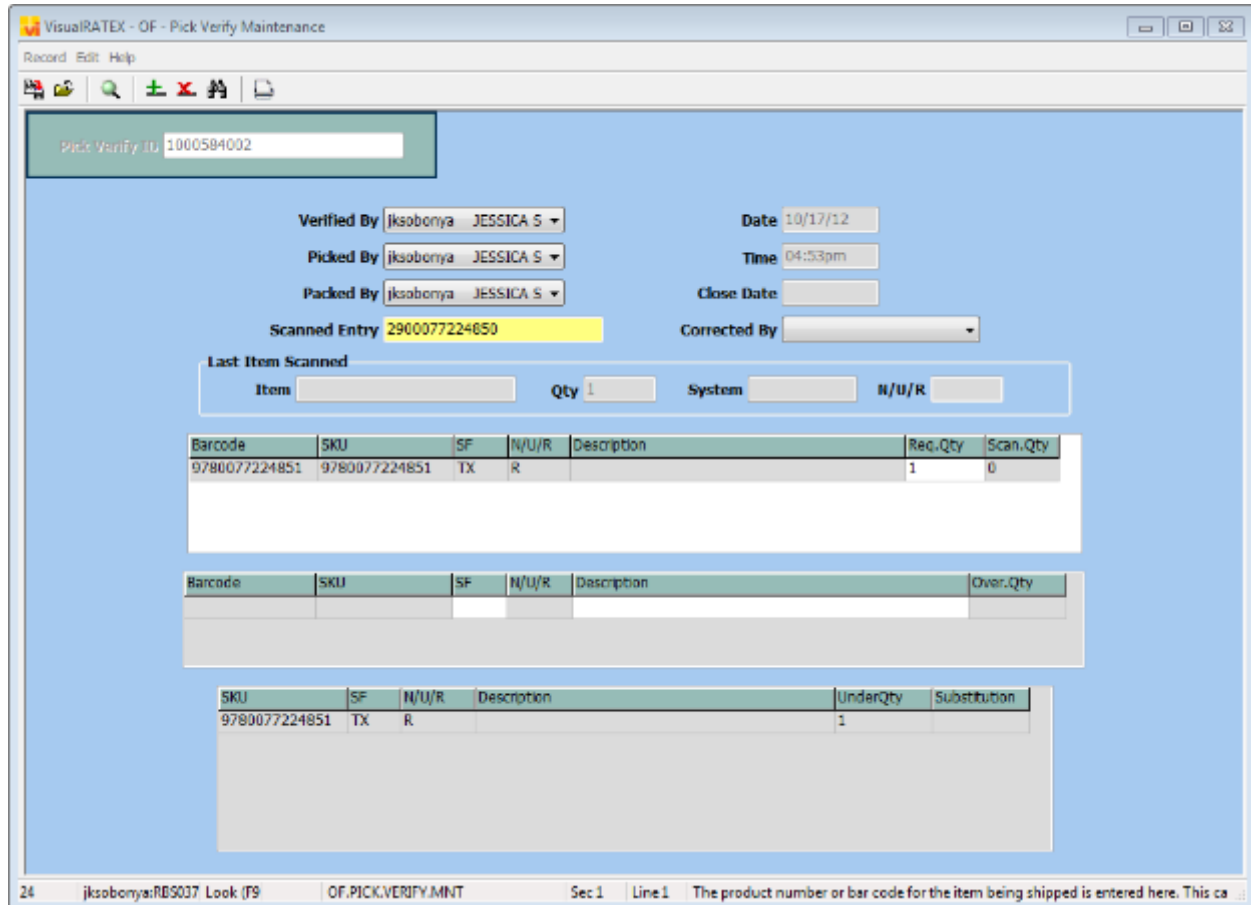
| Stock Information |           |          |           |
|-------------------|-----------|----------|-----------|
|                   | Floor     | Other    | Location  |
| New               | 10        | 0        | 0         |
| Used              | 9         | 0        | 0         |
| Rental            | 0         | 0        | 0         |
| <b>Totals</b>     | <b>19</b> | <b>0</b> | <b>19</b> |

*Pick List & Stock Information for ISBN 9780073256528*

### PICK VERIFYING

To pick verify a non-serialized rental textbook, scan either the used ISBN or the new ISBN, whichever stock was decremented during the picking process. In the below example, the used book was picked/decremented, and the used book is being scanned during pick verification:



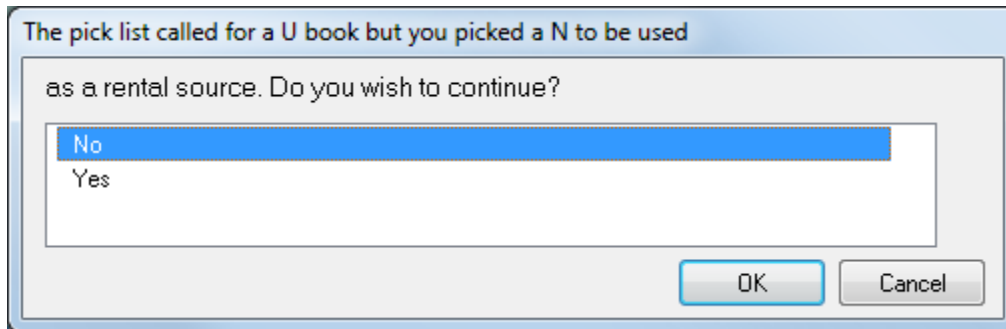


**OF.PICK.VERIFY.MNT**  
*Pick Verifying a Non-Serialized Rental Textbook (Used)*

When the used book is scanned and the pick verification record is saved, several things happen:

- The packing slip is printed. It displays identical information about the rental agreement that was explained previously in the serialized textbook rental section of this document.
- A textbook rental record (TX.RENTAL) is created for the rental sale. Transfer records which record the inventory transfer from used or new stock to rental stock will be created when the sales order is closed (see next section).

When pick verifying a non-serialized rental, a substitution or “hot swap” can be performed if the preferred inventory is no longer available and the Rental Allow Used and Rental Allow New parameters are “Y”. For example, the used book was picked/decremented on the sales order, but the used book is no longer available on the shelf or fulfillment location. If the new book is scanned during pick verification, the following prompt will display:



Select "Yes" to continue with the verification. The sales order, order total, inventory, and textbook rental record mentioned above will be properly adjusted & created. Select "No" to not scan the book; the book will be considered "unexpected" and should not be shipped.

## SHIPMENT CLOSE

Once the non-serialized rental textbook order has been pick verified, it can be closed like any other sales order. Upon closing, the following will occur:

- A sales transaction record (POS.VST) will be created which will include rental information.
- The textbook rental record (TX.RENTAL) will be updated for the serialized rental record that was created during pick list verification.
- The customer record (CO.CF) will be updated with the applicable rental information. This data can be viewed in Customer Maintenance, Rental tab for the customer who rented the textbook.
- Transfer records (INV.ITF & INV.IMTF) are created to record the transfer of the used or new stock to rental stock.

## CANCELING ORDERS

A non-serialized rental textbook sales order can be canceled any stage of the ordering process flow (RDPK, PICK, RDSH). If the sales order is canceled when the line status is PICK, the used or new inventory will be properly adjusted. If the sales order is canceled when the line status RDSH, the new or used inventory will be adjusted; the textbook rental record that was created during pick list verification will be decommissioned.

## RENTAL ENHANCEMENTS

eRATEX and Order Fulfillment have been modified with significant enhancements to support new and used rental functionality. The functionality is broken out into six main pieces:

- 1) New and Used Rental Functionality – Basic Explanation (Store and Vendor)
- 2) VisualRATEX Setup
- 3) eRATEX Setup
- 4) Collateral Collection
- 5) New and Used Rental Fulfillment
- 6) Collateral Charging

Each piece is described in the following sections.

### PREREQUISITES

To use new and used rentals online, the bookstore **MUST** be on VisualRATEX release 19.2 and eRATEX release 4.1. There are no exceptions to this rule. If you are not sure which release of VisualRATEX or eRATEX your bookstore has, please [contact RBS](#).

### NEW AND USED RENTAL FUNCTIONALITY

In VisualRATEX, rentals can be “new” or “used” and have “new” and “used” pricing. Each rental has the following fees:

- New Rental Fee
- New Damaged Fee
- New Unreturned Fee
- New Purchase Fee
- Used Rental Fee
- Used Damaged Fee
- Used Unreturned Fee
- Used Purchase Fee

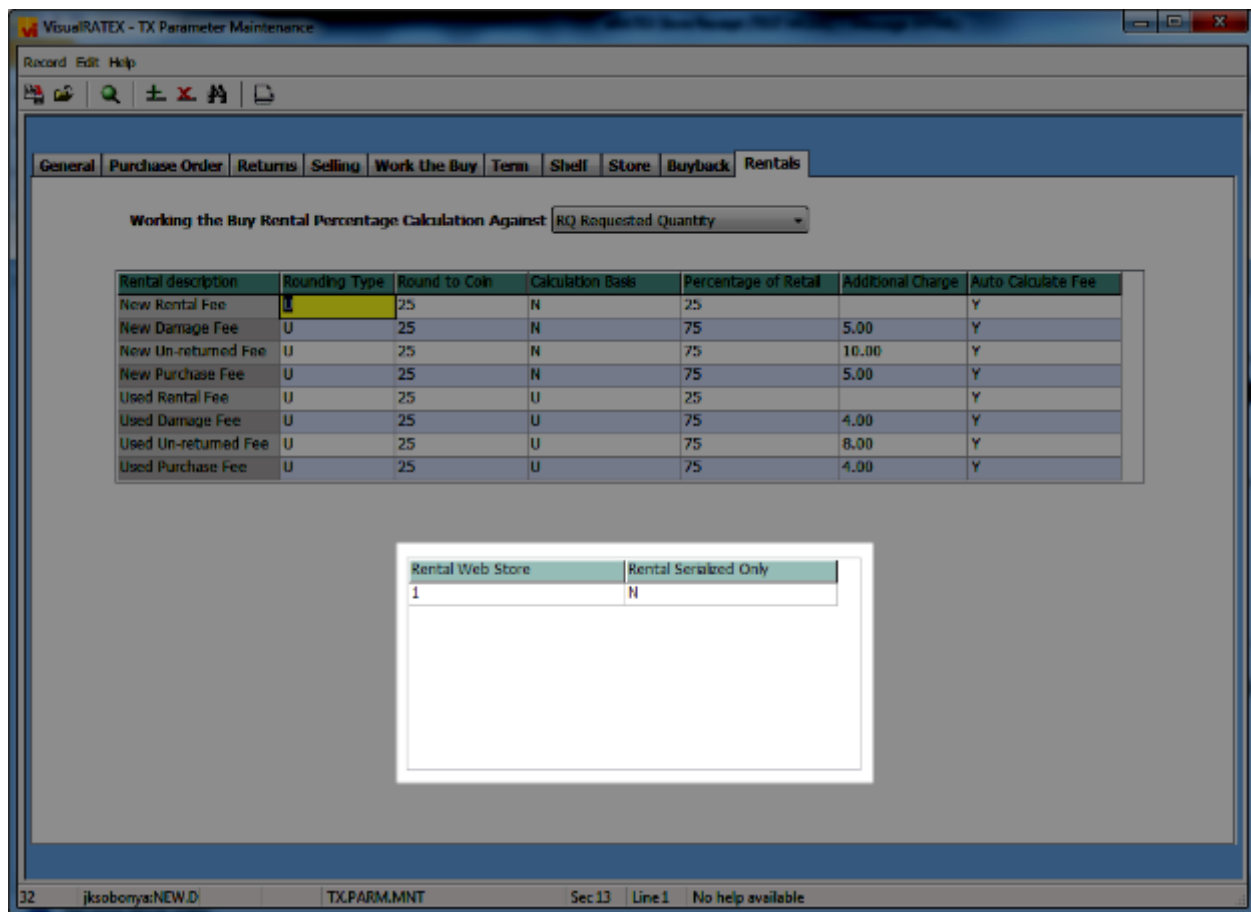
In addition, each rental must be defined as “Store” or “Vendor”. If a rental is a “Store” rental, the bookstore is responsible for the rental. If a rental is a “Vendor” rental, a vendor (like Follett) is responsible for the rental. Vendor rentals require some additional setup which is explained in detail in the Riskless Rental Procedural Guide.

As new and used rentals are defined in VisualRATEX, the data is sent to eRATEX via the integration.

Before new and used rentals can be sold, some rental parameters must be defined in VisualRATEX and the eRATEX Admin.

## VISUALRATEX SETUP

As explained in the Textbook Rentals setup, the bookstore must decide how to track rental inventory. New and used rentals can be pre-serialized (i.e. inventory is taken from the new and used rental stock) or non-serialized “on the fly” (i.e. inventory is taken from new and used stock). In Text Parameter Maintenance, Rentals tab, there is a grid that must be defined appropriately so eRATEX and Order Fulfillment will know whether to treat rental textbooks & inventory as serialized or non-serialized:



TX.PARM.MNT  
Text Rental Parameters grid

Rental Web Store should be defined with a web store number.

For pre-serialized rentals, enter “Y” in the Rental Serialized Only column. For on the fly rentals, enter “N” in the Rental Serialized Only column.

*TIP:* The Rental Allow New, Rental Allow Used, and Rental Preference parameters have been removed, because they are no longer applicable with the new and used rental logic.

## ERATEX SETUP

Minimal setup requirements are required to use new and used rentals on eRATEX.

The bookstore’s eRATEX Rental Agreement will need additional verbiage to describe the additional fees that may be charged to a customer. An example of the eRATEX Rental Agreement is shown in the “Placing a New/Used Rental Order” section.

On the BookList Configuration page, new and used rentals have substitution behavior options. The bookstore can decide whether or not they want to substitute new and used rentals. The logic is very similar to the regular substitution behavior preference for new and used books, and will be explained in more detail in the “Placing a New/Used Rental Order” section:

|                                      |                                                           |
|--------------------------------------|-----------------------------------------------------------|
| <b>Substitution Behavior:</b>        | <input checked="" type="radio"/> Allow Customer Selection |
|                                      | <input type="radio"/> Always Substitute                   |
|                                      | <input type="radio"/> Never Substitute                    |
| <b>Rental Substitution Behavior:</b> | <input checked="" type="radio"/> Allow Customer Selection |
|                                      | <input type="radio"/> Always Substitute                   |
|                                      | <input type="radio"/> Never Substitute                    |

Also on the Booklist Configuration page, the Set Display Order for Textbooks section includes New and Used Rentals, and can be modified if the bookstore wishes. The display order will be shown to the student on the Booklist page.

|                                         |                                |
|-----------------------------------------|--------------------------------|
| <b>Set Display Order for Textbooks:</b> |                                |
| eBook:                                  | <input type="text" value="1"/> |
| Used:                                   | <input type="text" value="2"/> |
| Used Rental:                            | <input type="text" value="3"/> |
| New:                                    | <input type="text" value="4"/> |
| New Rental:                             | <input type="text" value="5"/> |

## COLLATERAL COLLECTION

Collateral collection is an important aspect of the rental process. In the eRATEX Admin, on the eRATEX > Rental and eBook Configuration page, there is a prompt called “Require Collateral”, as shown below:

The screenshot shows a 'Textbook Rental Configuration' window with the following settings:

- Disabled:** Default:  No  Yes
- Out of Stock Option:** Default: Rental
- Require Collateral:**
  - For both in-store and vendor owned textbook rentals
  - For vendor owned textbook rentals only
  - Do not require collateral at all

The Require Collateral parameter can be defined in one of the following ways:

- For both in-store and vendor owned textbook rentals – Collateral is required for all rental purchases (Store and Vendor rentals).
- For vendor owned textbook rentals only – Collateral is required for Vendor rental purchases ONLY. Collateral is not required for Store rental purchases.
- Do not require collateral at all – Collateral is not required for rental purchases.



Click the Submit button to save the Require Collateral choice.

## PLACING A NEW/USED RENTAL ORDER

When a student goes to the Booklist page to purchase textbooks, they will see new and used rentals available for purchase, as well as substitution options, if the substitution preference is set to “Allow Customer Selection”, as shown below:

**SUMMER 2013 - MAIN - BIOAP 100 - Section 1**

Instructor: JORDAN, PHINNY

| Required Materials                                                                                                                                                                                                                                                       | select all: <a href="#">used</a>   <a href="#">rental used</a>   <a href="#">new</a>   <a href="#">rental new</a> | Allow substitution? (required)                        | unselect item                                                                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|-------------------------------------------------------------------------------------|
|  <p><b>VERTEBRATE LIFE</b><br/>           Author: POUGH<br/>           ISBN: 9780321545763<br/>           Publisher: Pearson<br/>           Edition: 8<br/>           Copyright: 09</p> | <input type="radio"/> <b>USED: \$89.00</b>                                                                        | <input type="radio"/> Yes<br><input type="radio"/> No |  |
|                                                                                                                                                                                                                                                                          | <input type="radio"/> <b>USED RENTAL: \$53.00</b>                                                                 |                                                       |                                                                                     |
|                                                                                                                                                                                                                                                                          | <input type="radio"/> <b>NEW: \$118.35</b>                                                                        |                                                       |                                                                                     |
|                                                                                                                                                                                                                                                                          | <input type="radio"/> <b>NEW RENTAL: \$71.00</b>                                                                  |                                                       |                                                                                     |

Students can add the applicable new or used rental books to their shopping cart and checkout. During the checkout process, the student must agree to the Rental Agreement. The rental fee, unreturned fee, damaged fee, and purchase fee for the rental is displayed to the student. If the student allows rental substitutions, the fees for the substituted rental title will also display, so the student will know what fees they may be charged if their rental is substituted during fulfillment:

Rental Agreement for SUMMER 2013

You agree to return your rental books by the specified Rental Return Date, or you will be charged the Unreturned Fee as specified for each product rented. If the rental book is damaged when returned, you will be charged the Damaged Fee. If you would like to purchase the rental book at the end of the term, you will be charged the Purchase Fee.

**ALL rentals are due on or before: 08/30/2013**

| Textbook                             | SKU           | Qty | Rental Fee | Unreturned Fee | Damage Fee | Purchase Fee | Accept Agreement         | Decline and Remove |
|--------------------------------------|---------------|-----|------------|----------------|------------|--------------|--------------------------|--------------------|
| VERTEBRATE LIFE                      | 9780321545763 | 1   | \$53.00    | \$91.25        | \$87.25    | \$87.25      | <input type="checkbox"/> | <b>X</b>           |
| <b>Fees if substitution is made:</b> |               |     | \$71.00    | \$121.00       | \$115.94   | \$116.00     |                          |                    |

The student must accept the rental agreement for each rental in their shopping cart to continue the checkout process.

After the student accepts the rental agreement, they must enter collateral credit card information, if the Require Collateral parameter is set. The following page will be displayed to the student:

Home Categories Textbooks Customer Service

Search:  Go [Track Your Order](#) | [Returns](#) | [Shipping Policy](#) | [FAQ](#)

Now In:

Browse Categories

- [Books - Best Sellers](#)
- [Clothing](#)
- [Gift Cards](#)
- [Gifts](#)
- [Graduation](#)
- [School Supplies](#)
- [Technology and Computers](#)

Help & Info

helpbox

### Collateral

In order to rent books, collateral is required. You will need to input credit card information.

[About YourCompany.com](#) | [Returns](#) | [FAQ](#) | [Contact Us](#)  
[Wishlist](#) | [Site Map](#) | [Privacy Policy](#) | [Security](#)

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Powered by eRATEX™ RATEX Business Solutions

eRATEX  
Collateral page

The student can choose to go back or continue to input collateral credit card information. When the student clicks Continue, they will be redirected to the applicable payment gateway (i.e. CyberSource, Moneris) to input credit card information, as shown below:



| Payment Details                                                                                        |                                                                                          |
|--------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| Total Amount                                                                                           | \$ 0.01                                                                                  |
| Description                                                                                            | Your card is only being validated at this time.                                          |
| All fields in bold are required.                                                                       |                                                                                          |
| Credit Card                                                                                            |                                                                                          |
|                                                                                                        |                                                                                          |
| Credit Card Type                                                                                       | MasterCard                                                                               |
| Credit Card Number                                                                                     | <input type="text"/>                                                                     |
| Card Verification Number                                                                               | <input type="text"/> <a href="#">What's this?</a>                                        |
| Expiration Date                                                                                        | <input type="text"/>                                                                     |
|                                                                                                        |                                                                                          |
| Billing Information                                                                                    |                                                                                          |
| First/Last Name                                                                                        | <input type="text"/> Jessica <input type="text"/> Sobonya                                |
| Company                                                                                                | <input type="text"/>                                                                     |
| Street Address 1                                                                                       | <input type="text"/> 610 W Germantown Pike                                               |
| Street Address 2                                                                                       | <input type="text"/>                                                                     |
| City/State/Postal Code                                                                                 | <input type="text"/> Plymouth Meeting <input type="text"/> PA <input type="text"/> 19462 |
| Country                                                                                                | <input type="text"/>                                                                     |
| Phone Number                                                                                           | <input type="text"/> 1610828863                                                          |
| Email Address                                                                                          | <input type="text"/> jksobonya@ratex.com                                                 |
| Shipping Information                                                                                   |                                                                                          |
| <input type="checkbox"/> Use the name and billing address shown above.                                 |                                                                                          |
| First/Last Name                                                                                        | <input type="text"/> Jessica <input type="text"/> Sobonya                                |
| Company                                                                                                | <input type="text"/>                                                                     |
| Street Address 1                                                                                       | <input type="text"/> 610 W Germantown Pike                                               |
| Street Address 2                                                                                       | <input type="text"/>                                                                     |
| City/State/Postal Code                                                                                 | <input type="text"/> Plymouth Meeting <input type="text"/> PA <input type="text"/> 19462 |
| Country                                                                                                | <input type="text"/>                                                                     |
| Phone Number                                                                                           | <input type="text"/> 1610828863                                                          |
| <input type="button" value="Back to Shopping Cart"/> <input type="button" value="Confirm Collateral"/> |                                                                                          |

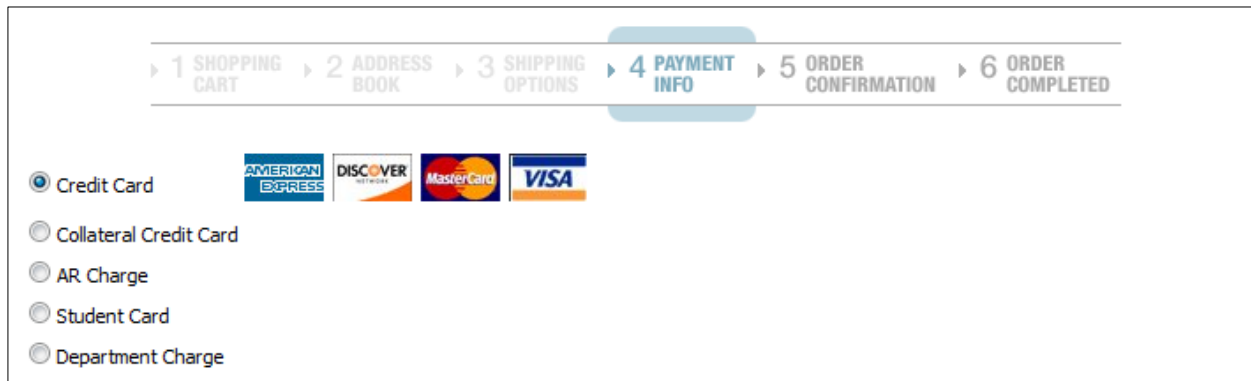
eRATEX  
Entering Collateral Credit Card Information on CyberSource

Once the student enters credit card information, they can click the Confirm Collateral button to be redirected back to the site. As they are being redirected, a Completing Collateral graphic will display:

### Completing Collateral...



The student will be redirected to the Payment Information page to pay for the order. The student has the option of using the collateral credit card that they just entered to pay for the order, or they can use a different credit card, or different payment method, as shown below:



eRATEG

*Payment Options including Collateral Credit Card at Checkout*

When checkout is complete, the Rental Agreement, including all fees, is appended to the Order Confirmation e-mail. The collateral credit card information is also displayed at the top of the e-mail:

**eRATEX Store Receipt**  
 \*\*\* PLEASE PRINT RECEIPT OUT AND RETAIN IT FOR FUTURE REFERENCE \*\*\*

Order Number: 100063  
 Customer ID: 4  
 Order Date: 6/6/2013 3:07:06 PM

**Bill To:**  
 Jessica Sobonya  
 610 W Germantown Pike  
 305  
 Plymouth Meeting, PA 19462  
 United States  
 1-610-828-8630  
[jsobonya@erates.com](mailto:jsobonya@erates.com)

**Ship To:**  
 Jessica Sobonya  
 610 W Germantown Pike  
 305  
 Plymouth Meeting, PA 19462  
 United States  
 1-610-828-8630

| Rental Collateral |                 |            |            |
|-------------------|-----------------|------------|------------|
| Name On Card:     | Jessica Sobonya | Card Type: | MasterCard |
| Card Number:      | ****5100        |            |            |

|                 |                     |                  |                 |
|-----------------|---------------------|------------------|-----------------|
| Order Date:     | 6/6/2013 3:07:06 PM | Locale/Currency: | en-US / USD     |
| Payment Method: | Credit Card         | Name On Card:    | Jessica Sobonya |
| Card Type:      | Visa                | Card Number:     | ****            |

| SKU           | Product                                              | Quantity | Price   | Ext. Price |
|---------------|------------------------------------------------------|----------|---------|------------|
| 9780321545763 | VERTEBRATE LIFE-USED RENTAL<br>Substitutions Allowed | 1        | \$53.00 | \$53.00    |

|              |      |                          |                |
|--------------|------|--------------------------|----------------|
| Order Notes: | None | SubTotal:                | \$53.00        |
|              |      | Shipping: FedEx - Ground | \$6.50         |
|              |      | Tax:                     | \$0.00         |
|              |      | <b>Total:</b>            | <b>\$59.50</b> |

| Rental Agreement for SUMMER 2013                                                                                                                                                                                                                                                                                                                         |               |     |                               |                |            |              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-----|-------------------------------|----------------|------------|--------------|
| You agree to return your rental books by the specified Rental Return Date, or you will be charged the Unreturned Fee as specified for each product rented. If the rental book is damaged when returned, you will be charged the Damaged Fee. If you would like to purchase the rental book at the end of the term, you will be charged the Purchase Fee. |               |     |                               |                |            |              |
| Textbook                                                                                                                                                                                                                                                                                                                                                 | SKU           | Qty | Rental Fee                    | Unreturned Fee | Damage Fee | Purchase Fee |
| VERTEBRATE LIFE                                                                                                                                                                                                                                                                                                                                          | 9780321545763 | 1   | \$53.00                       | \$91.25        | \$87.25    | \$87.25      |
|                                                                                                                                                                                                                                                                                                                                                          |               |     | Fees if substitution is made: | \$71.00        | \$121.00   | \$115.94     |
|                                                                                                                                                                                                                                                                                                                                                          |               |     |                               |                | \$116.00   |              |

*Order Confirmation E-mail*

Once the order has been placed, it will be processed through Order Fulfillment.

## ORDER FULFILLMENT

When an order is placed for a new or used rental, the textbook will display on the sales order as "RN" or "RU", respectively:

| Item Link     | Description     | Qty | N/U/R | System Flag | Retail | Line status | Shipment | Tax  | Ext Retail |
|---------------|-----------------|-----|-------|-------------|--------|-------------|----------|------|------------|
| 9780321545763 | VERTEBRATE LIFE | 1   | RU    | TX          | 53.00  | RDPK        | 001      | 0.00 | 53.00      |

In the above example, a used rental was ordered.

If the used rental is serialized, used rental stock is checked. If the used rental is non-serialized, used stock is checked. If there is adequate stock on hand to fulfill the sales order, the sales order can be picked.

**TIP:** Because new and used rentals require the student to agree to a rental agreement and enter collateral credit card information in eRATEX, the ability to manually add new or used rentals to sales orders is not allowed.

## PICKING

When the sales order is picked, the appropriate stock is decremented. The pick list will display whether new rental stock or used rental stock was decremented (pre-serialized) or new stock or used stock was decremented (on the fly), as shown below:

Customer ID: 000004923  
 Customer Name: Sobonya, Jessica  
 Customer Phone: 610-828-8630  
 Customer Email: jksobonya@ratex.com

### Pick Slip Reprint

Page 1 of 1

Picked By: \_\_\_\_\_



|                         |                             |             |         |
|-------------------------|-----------------------------|-------------|---------|
| Sales Order: 0001086    | Priority: Normal            | Date        | Time    |
| Shipment ID: 0001086001 | Shipped Via: FedEx - Ground | 10 JUN 2013 | 03:07pm |

Shipment Notes:

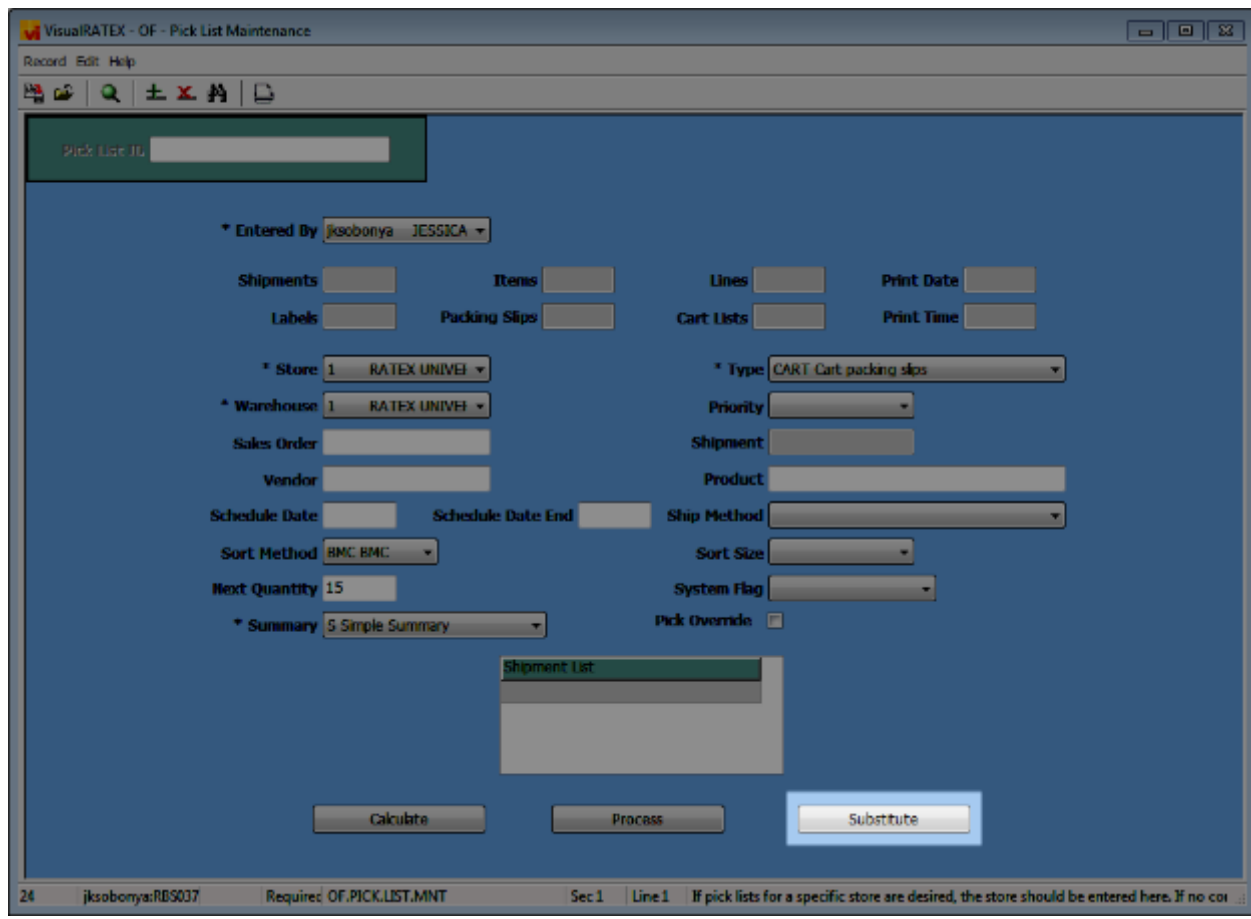
| Location | Picked | Qty | SKU           | Web ID | N/U/R | Size/Course | Description             | Price | Sub |
|----------|--------|-----|---------------|--------|-------|-------------|-------------------------|-------|-----|
|          |        | 1   | 2900321545762 | Text   | Used  | BIOAP.100   | POUGH - VERTEBRATE LIFE | 53.00 | Y   |

| Stock Information |           |          |           |
|-------------------|-----------|----------|-----------|
|                   | Floor     | Other    | Location  |
| New               | 10        | 0        |           |
| Used              | 6         | 0        |           |
| New Rental        | 0         | 0        |           |
| Used Rental       | 0         | 0        |           |
| <b>Totals</b>     | <b>16</b> | <b>0</b> | <b>16</b> |

Pick List & Stock Information for rental on the fly ISBN 9780321545763

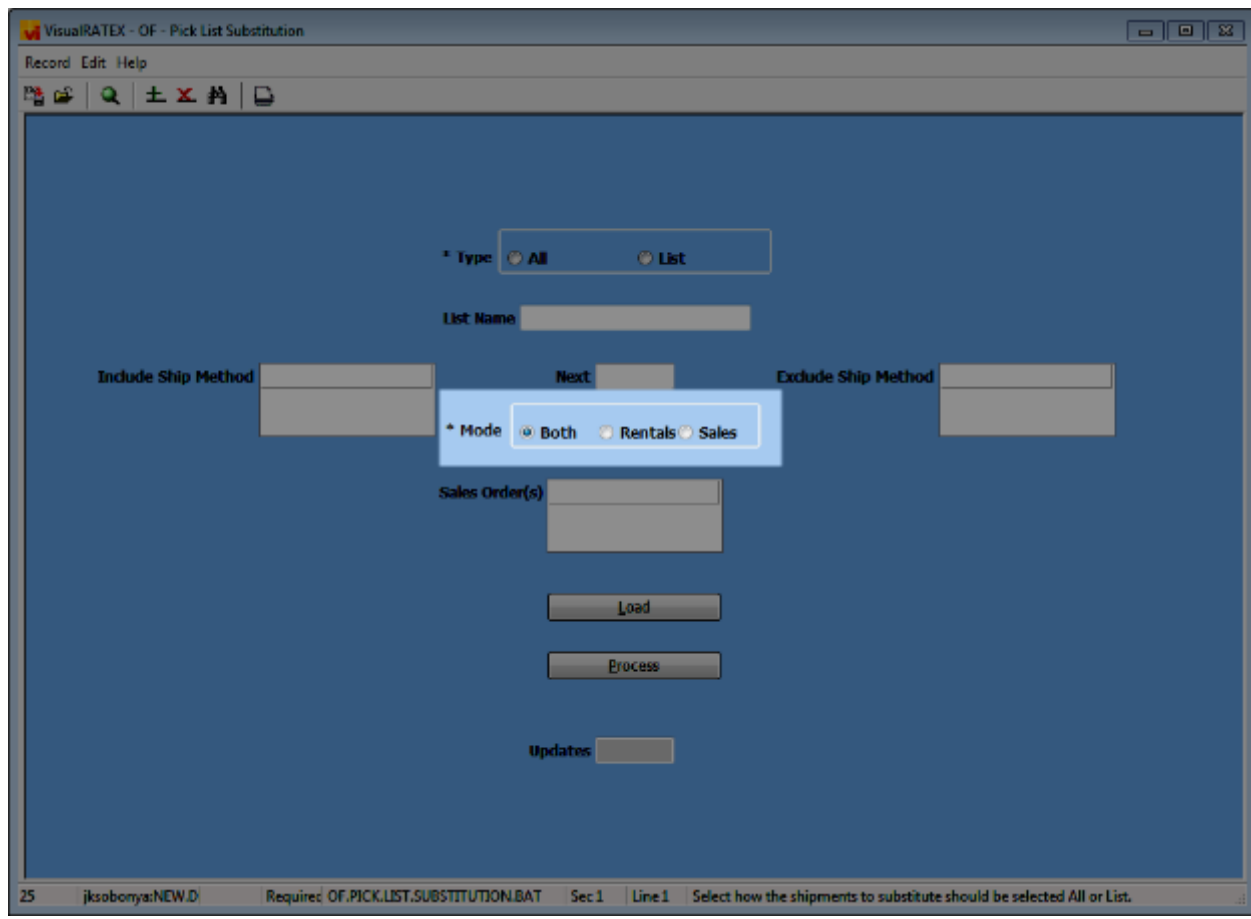
## SUBSTITUTIONS

During the picking process, new and used rentals can be substituted by clicking the Substitute button in Pick List Selection:



OF.PICK.LIST.MNT  
Pick List Selection screen

In the Pick List Substitution screen, a “Mode” field has been added so the bookstore can choose which textbooks to substitute: Rentals (new and used rentals), Sales (new and used books), or Both:



*OF.PICK.LIST.SUBSTITUTION.BAT  
Pick List Substitution screen*

As new and used rentals are substituted, the sales order is automatically updated with the rental changes, and an e-mail update is sent to the student notifying them that a rental on their order has been substituted:

## eRATEX Store

Hi Jessica,

We just wanted to let you know that we've updated the status of your order 100063, placed on 6/6/2013. Please contact us if you have any questions about this order.

Thanks for shopping with us,  
eRATEX Store Customer Service

Please note: Replies to this e-mail will not be answered. If you require assistance please visit our website for contact information.

Your order was split into multiple shipments for faster processing. The shipments are shown below with the products in each shipment.

Order Number: **100063**

Shipment 1086001: Processing

| Quantity | Web Id        | Description                                   | Status     |
|----------|---------------|-----------------------------------------------|------------|
| 1        | 9780321545763 | <a href="#">VERTEBRATE LIFE - USED RENTAL</a> | Processing |

Shipment 1086002: Processing

| Quantity | Web Id        | Description                                                                       | Status     |
|----------|---------------|-----------------------------------------------------------------------------------|------------|
| 1        | 9780078021701 | <a href="#">ECONOMICS - NEW RENTAL</a><br>Substituted for ECONOMICS - USED RENTAL | Processing |

Powered by eRATEX

*Order Update E-mail with Rental Substitution*

## PICK LIST VERIFICATION

During pick list verification, the new rental or used rental must be verified before the sales order can be shipped and closed.

When pick verifying a new or used rental, a substitution or “hot swap” can be performed if the preferred inventory is no longer available. The logic is identical to substituting/”hot swapping” new and used books. For example, a used rental was picked on the sales order, but the used rental is no longer available on the shelf or fulfillment location at the time of verification. If a new rental is scanned during pick list verification, the following prompt will display:

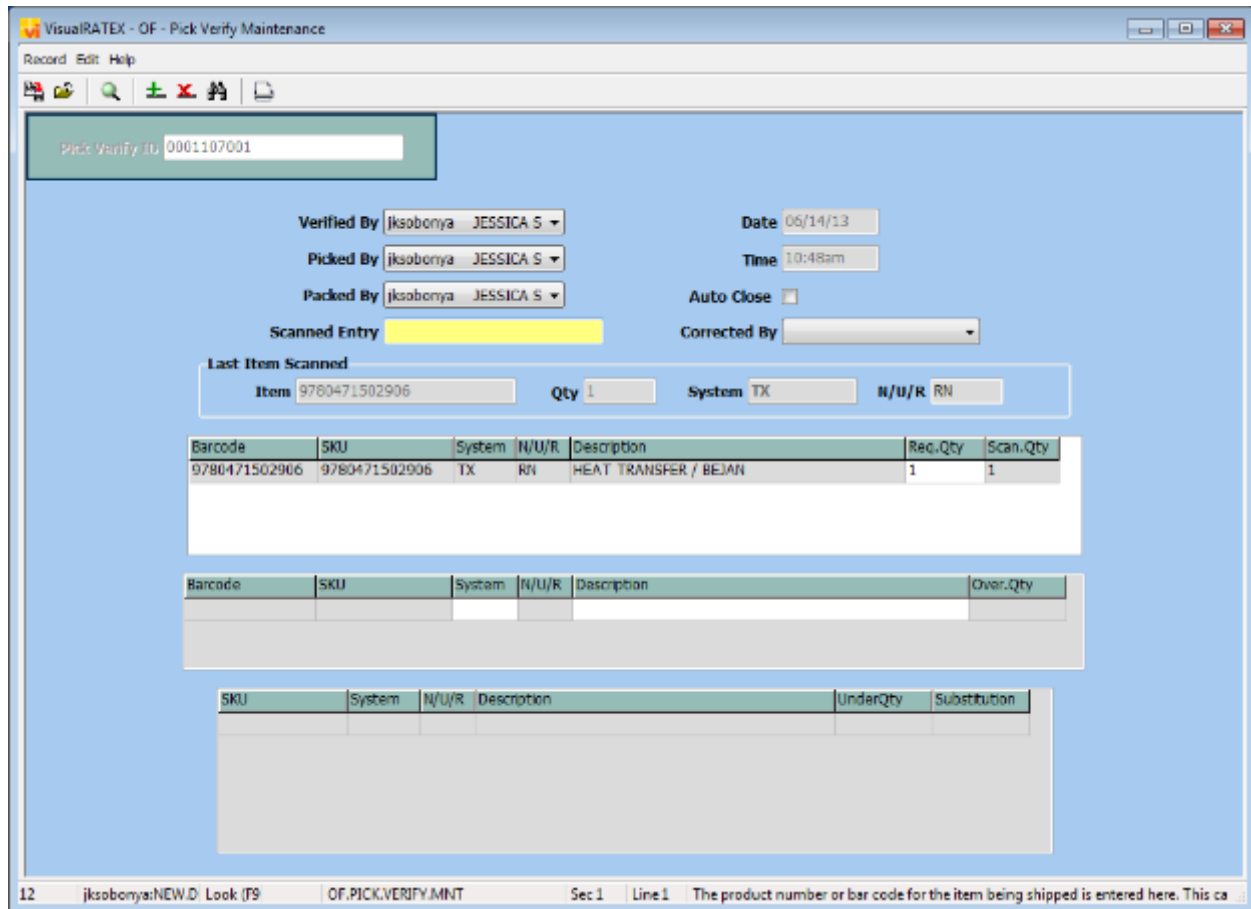
**Hot Swap Menu**

The book scanned was not what the customer requested.  
The scanned book will be substituted for the book the customer requested.  
Do you wish to proceed with the substitution?

Yes

No

Select “Yes” to continue with the verification. The new rental will be scanned, as shown below:



*OF.PICK.VERIFY.MNT  
Hot Swapping a Used Rental for a New Rental*

When a hot swap occurs, the sales order, order total, and inventory is properly adjusted.

If the new rental was scanned accidentally, select “No” to not scan the book; the book will be considered “unexpected” and should not be shipped.

When all items have been scanned and the sales order is saved, rental serial numbers are created for each rental title, and the packing list displays the rentals serial numbers for each rental title:





MEMBER NATIONAL ASSOCIATION OF COLLEGE STORES

RATEX Business Solutions  
 2250 Hickory Road, Suite 10  
 Plymouth Meeting, PA 19462-1047  
 PHONE 800-417-2839  
 FAX 607-255-0083

June 21, 2013

Page 1 of 1

### Packing Slip



|                       |                     |                           |
|-----------------------|---------------------|---------------------------|
| Internet Order 100084 | Shipment 0001122001 | Customer 000004923        |
| Ship Method FEDXG     | Priority Normal     | Email jksobonya@ratex.com |

|                                                                                                                                    |                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>SHIP TO:</b><br>Jessica Sobonya<br>610 W Germantown Pike<br>305<br><br>Plymouth Meeting, PA 19462<br>PHONE: 16108288630<br>FAX: | <b>BILL TO:</b><br>Jessica Sobonya<br>610 W Germantown Pike<br>305<br><br>Plymouth Meeting, PA 19462<br>PHONE: 16108288630<br>FAX: |
|------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|

| Qty | Item No       | Description                                                                                                                                        | Price                          | Amount        |
|-----|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|---------------|
| 1   | 9780073402680 | CHEMISTRY<br>***Rental*** R0002107<br>This book must be returned at the end of the rental program to avoid paying the replacement fee of \$191.00. | 121.25                         | 121.25        |
|     |               |                                                                                                                                                    | Subtotal:                      | 121.25        |
|     |               |                                                                                                                                                    | Packaging, Handling & Delivery | 6.50          |
|     |               |                                                                                                                                                    | Sales Tax:                     | 0.00          |
|     |               |                                                                                                                                                    | <b>TOTAL:</b>                  | <b>127.75</b> |

*Packing List with Rental Information*

## SHIPMENT CLOSE

Once the new or used rental textbook order has been pick verified, it can be closed like any other sales order. Upon closing, the following will occur:

- A sales transaction record (POS.VST) will be created which will include rental serial number and other relevant information.
- The textbook rental record (TX.RENTAL) will be updated for the new or used rental that was created during pick list verification. The textbook record will record the rental fee, damaged fee, unreturned (replacement) fee and purchase fee.
- The customer record (CO.CF) will be updated with the applicable rental information. This data can be viewed in Customer Maintenance, Rental tab for the customer who rented the textbook.

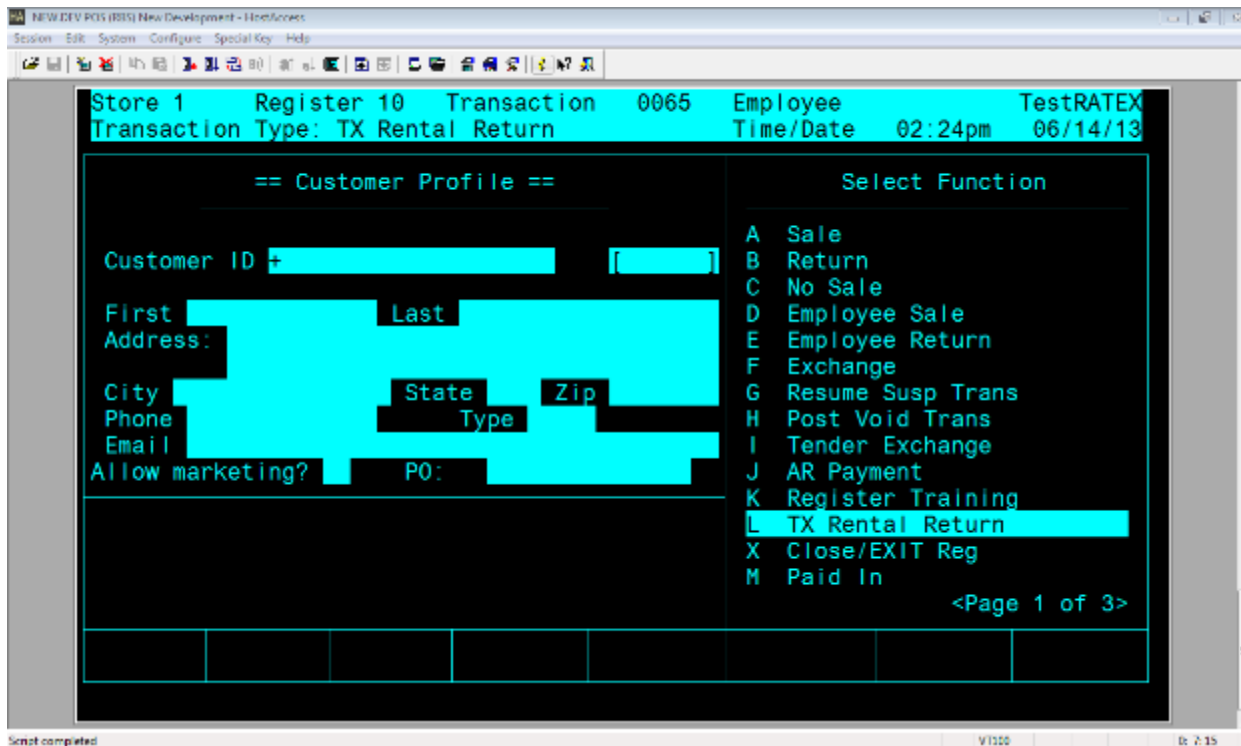
## COLLATERAL CHARGING

If collateral credit card information was collected for a new or used rental purchase on eRATEX, the credit card information is stored at CyberSource or Moneris. When the sales order is shipped and closed, the transaction is stamped with a collateral service of "ERATEX". If collateral was not collected, the transaction will not have a collateral service.

The collateral credit card can be used in POS\*Liberty to charge the unreturned (replacement) rental fee at the end of the semester, when the student fails to return their rental book by the rental return date.

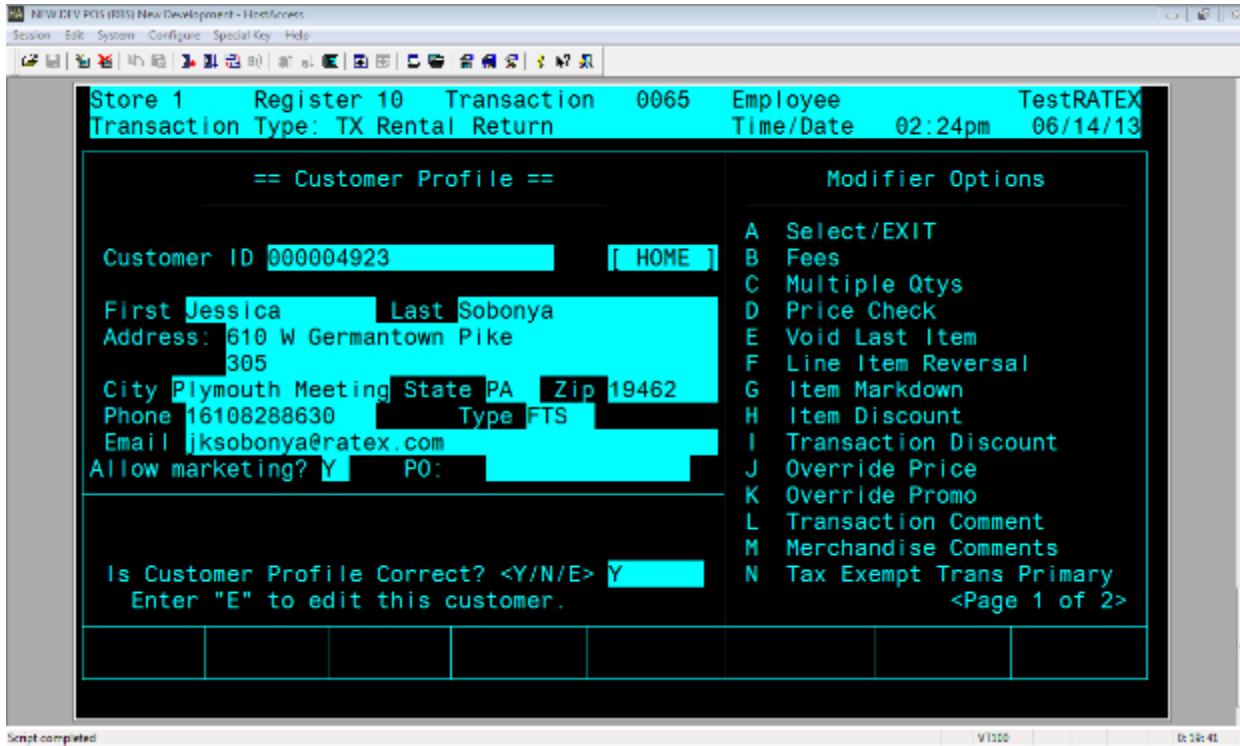
The unreturned (replacement) rental fee is charged during a Rental Check-In. The Rental Check-In process is explained in detail below.

To begin, a user must be logged into a register. Select "TX Rental Return" from the list of options on the right-hand side of the screen:

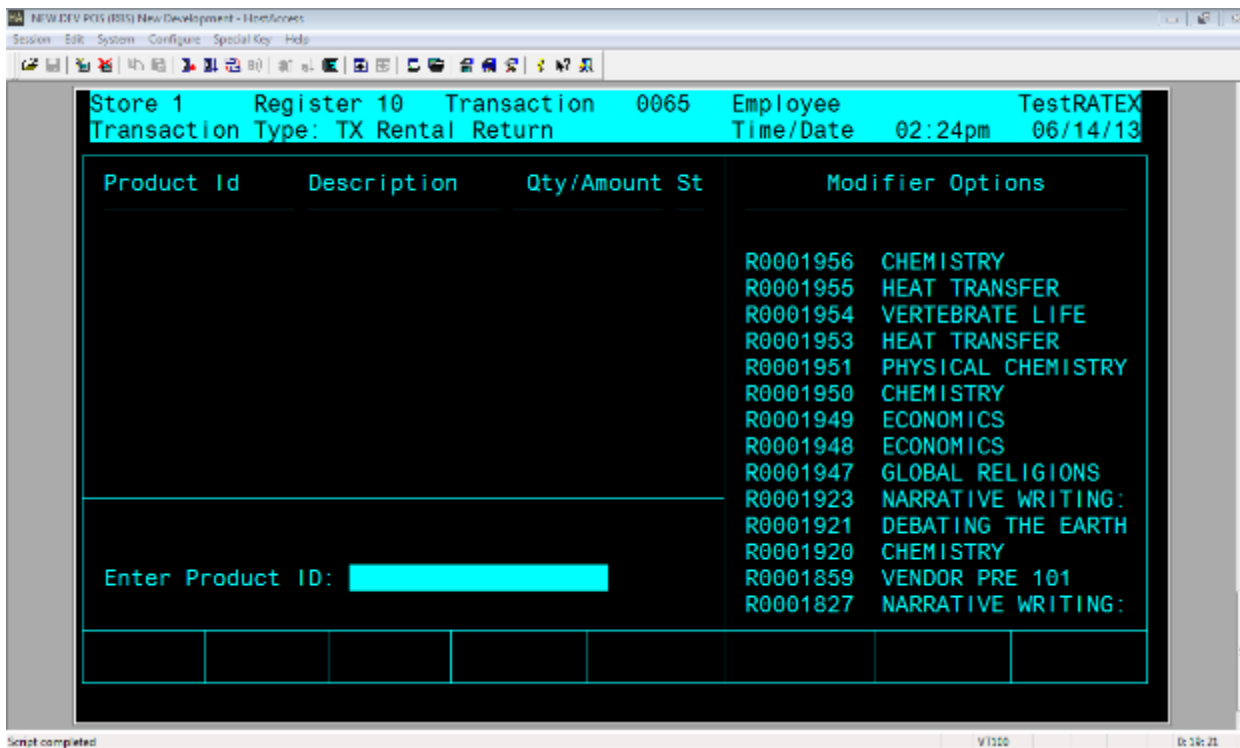


*TX Rental Return option*

When TX Rental Return is highlighted, the user is prompted to enter a customer ID. Enter a customer ID, or perform a word search to find the customer ID that you need to charge the unreturned (replacement) rental fee. Once a customer has been selected, type "Y" if the customer profile is correct, and press Enter to advance to the next screen:

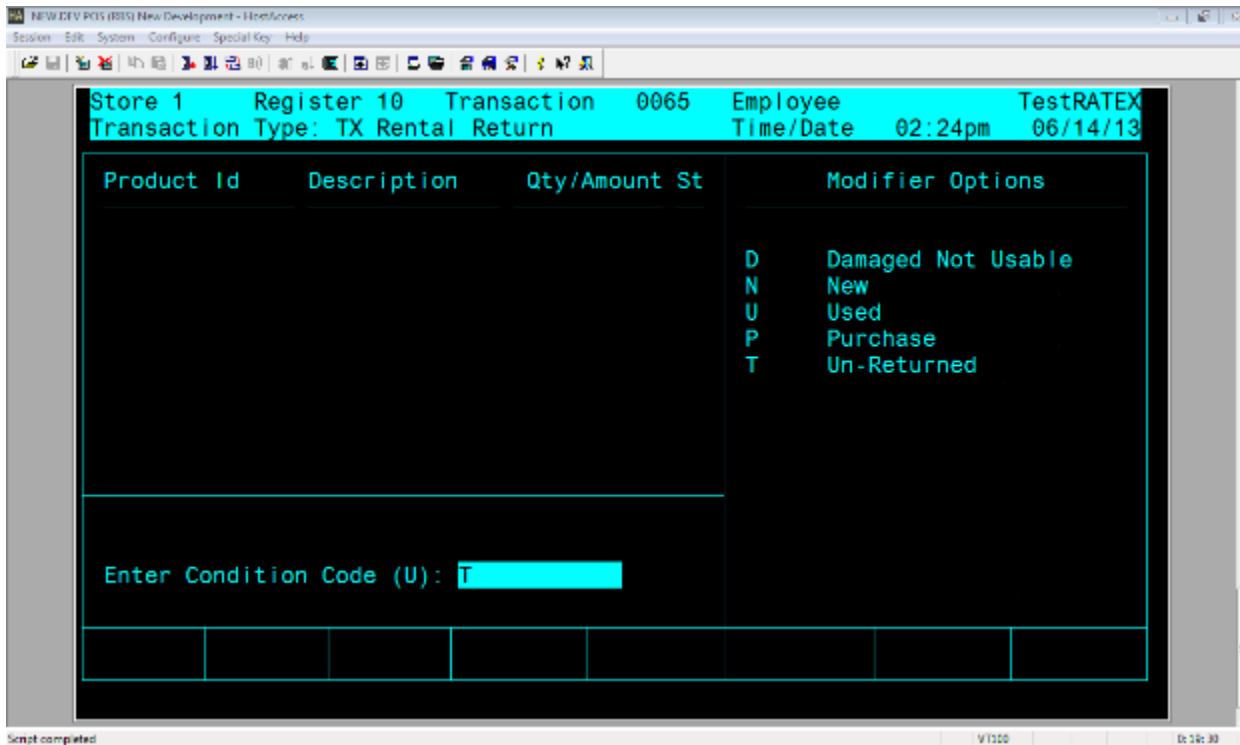


The user will be prompted to select a rental serial number to check-in:

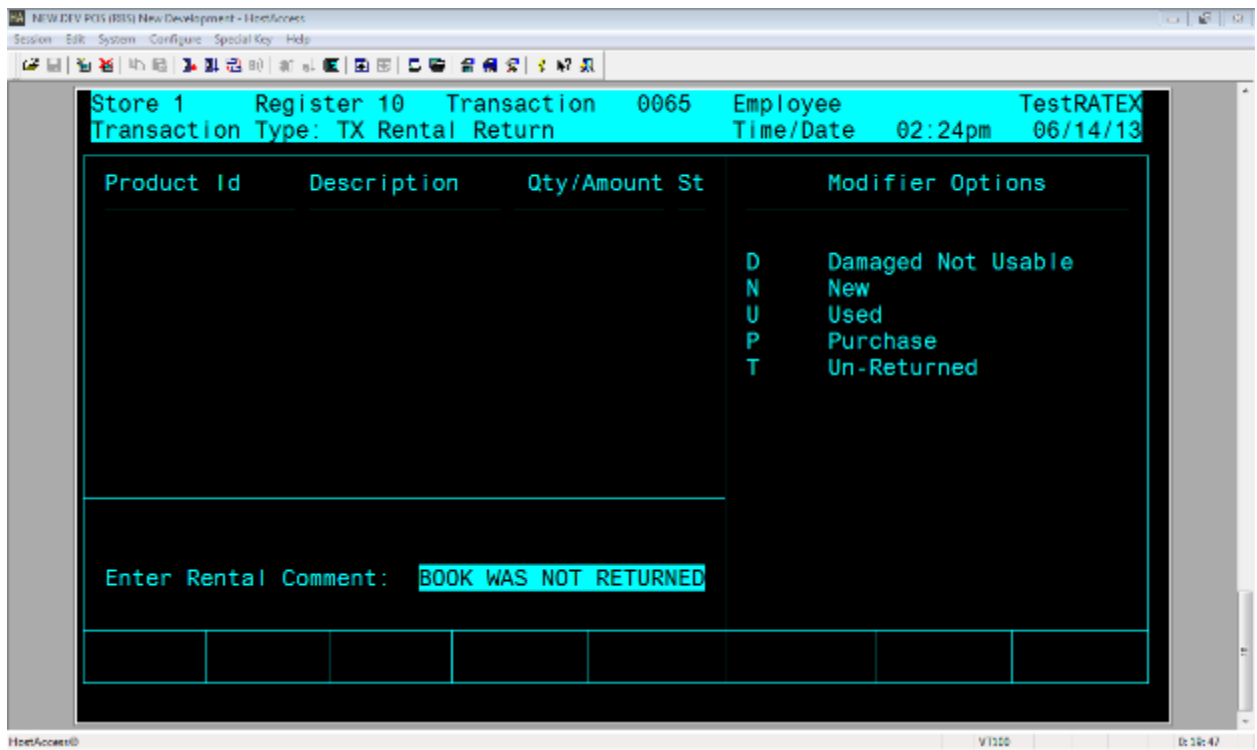


Enter a rental serial number from the right-hand side, and press Enter to advance to the next screen.

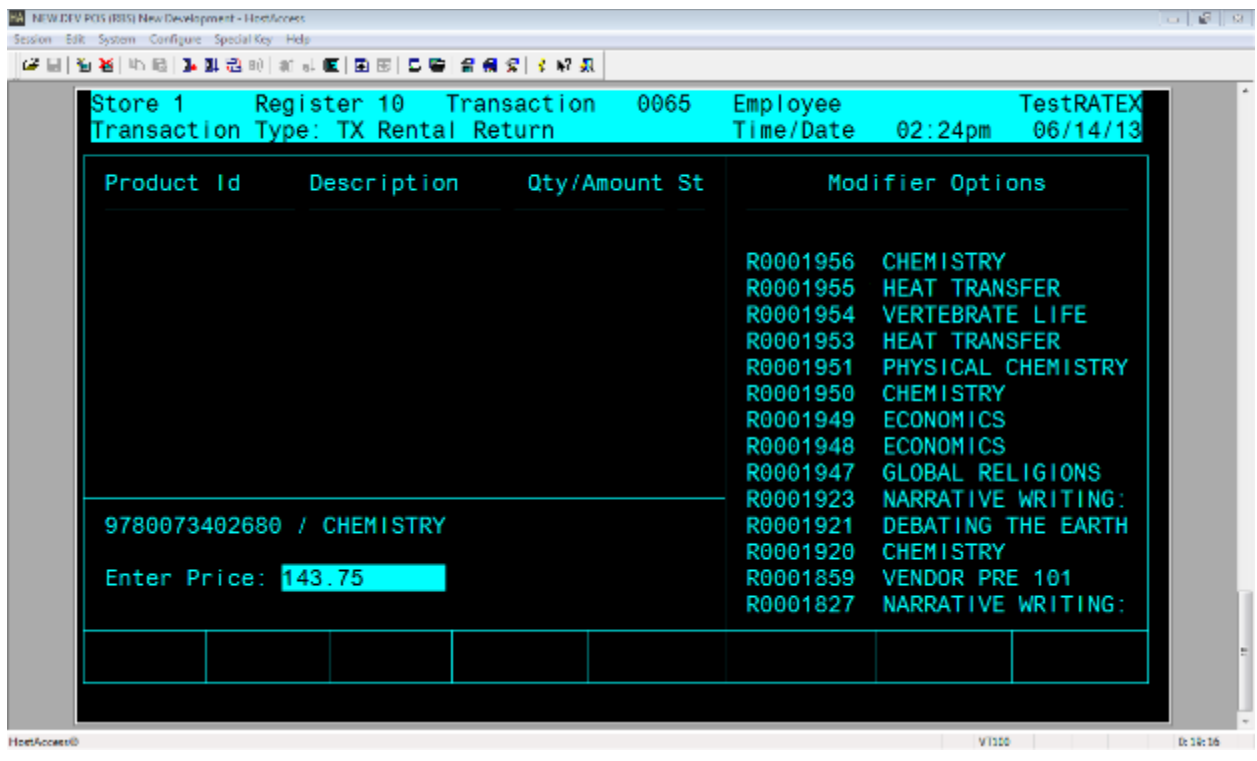
The user will be prompted to enter the condition of the rental. Since the rental is un-returned, select T for Un-Returned, and press Enter to advance to the next screen:



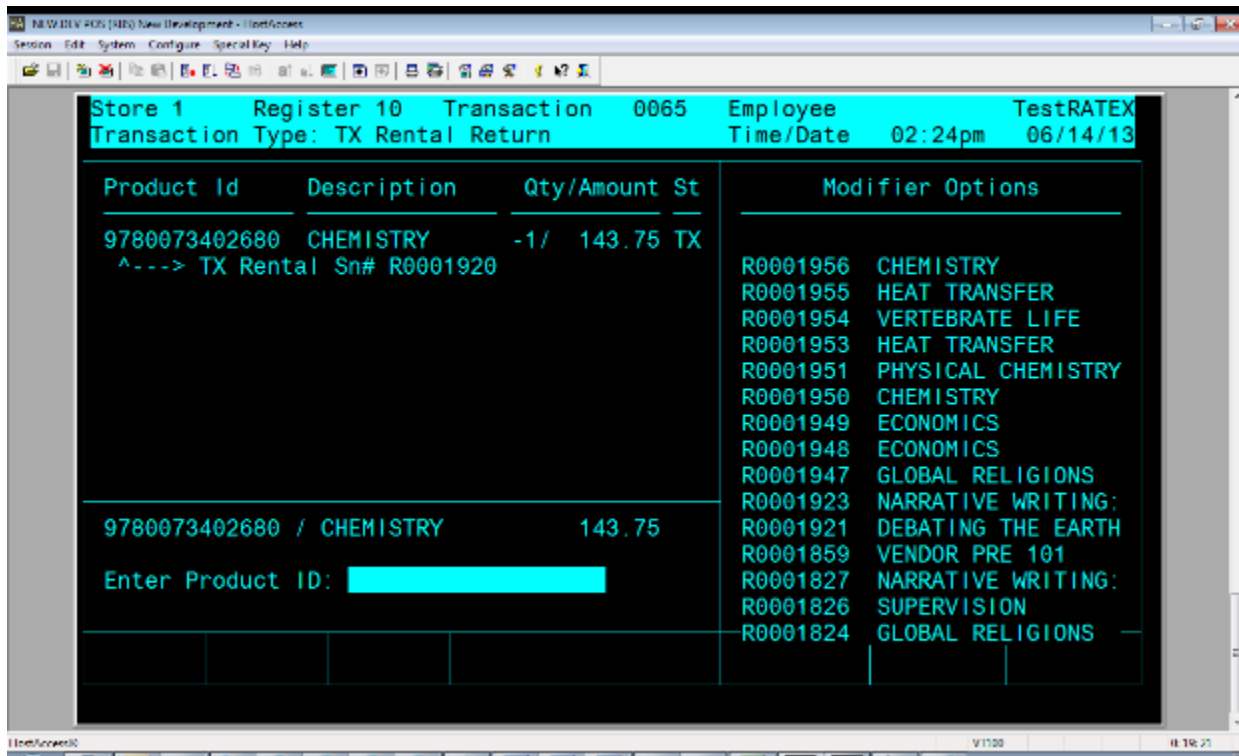
After selecting T for Un-Returned, the user must enter a rental comment. Enter a comment about the book, i.e. BOOK WAS NOT RETURNED, and press Enter to advance to the next screen:



After entering the rental comment, the unreturned rental fee will display in the Enter Price prompt. Press Enter to confirm the price:

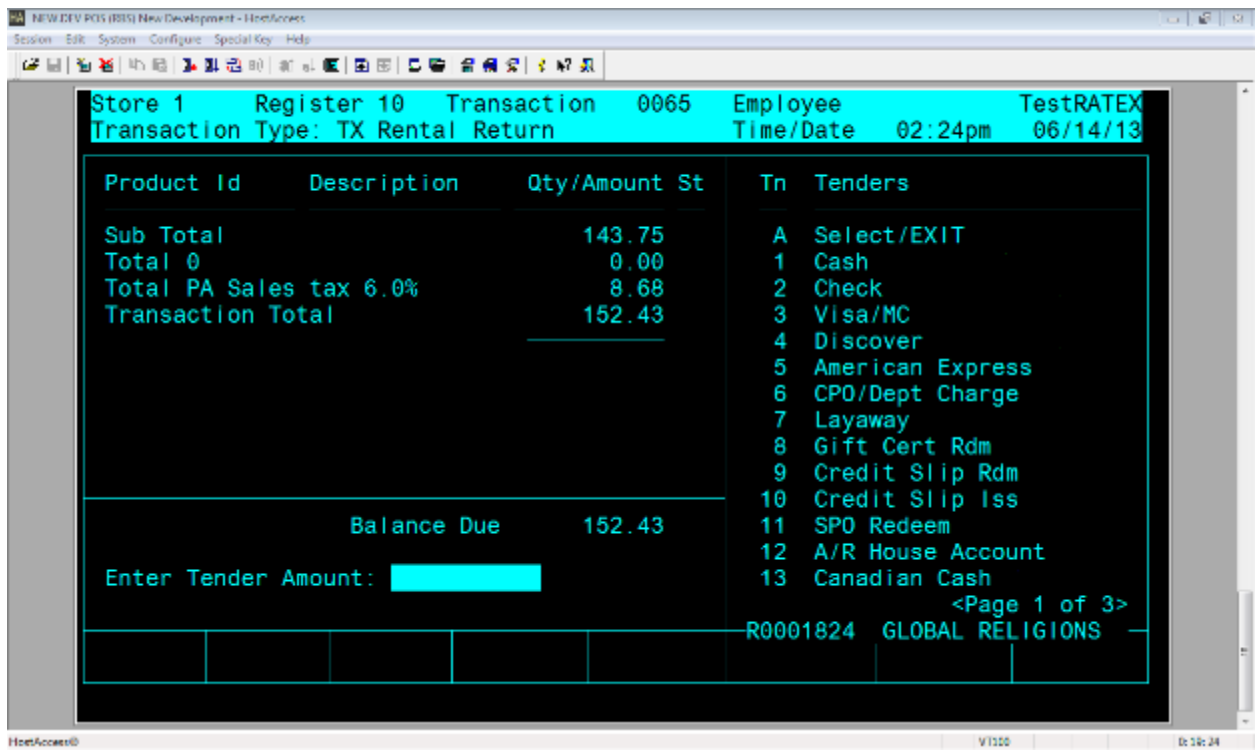


After confirming the price, the rental serial number will display at the top of the screen, along with the unreturned (replacement) rental fee:

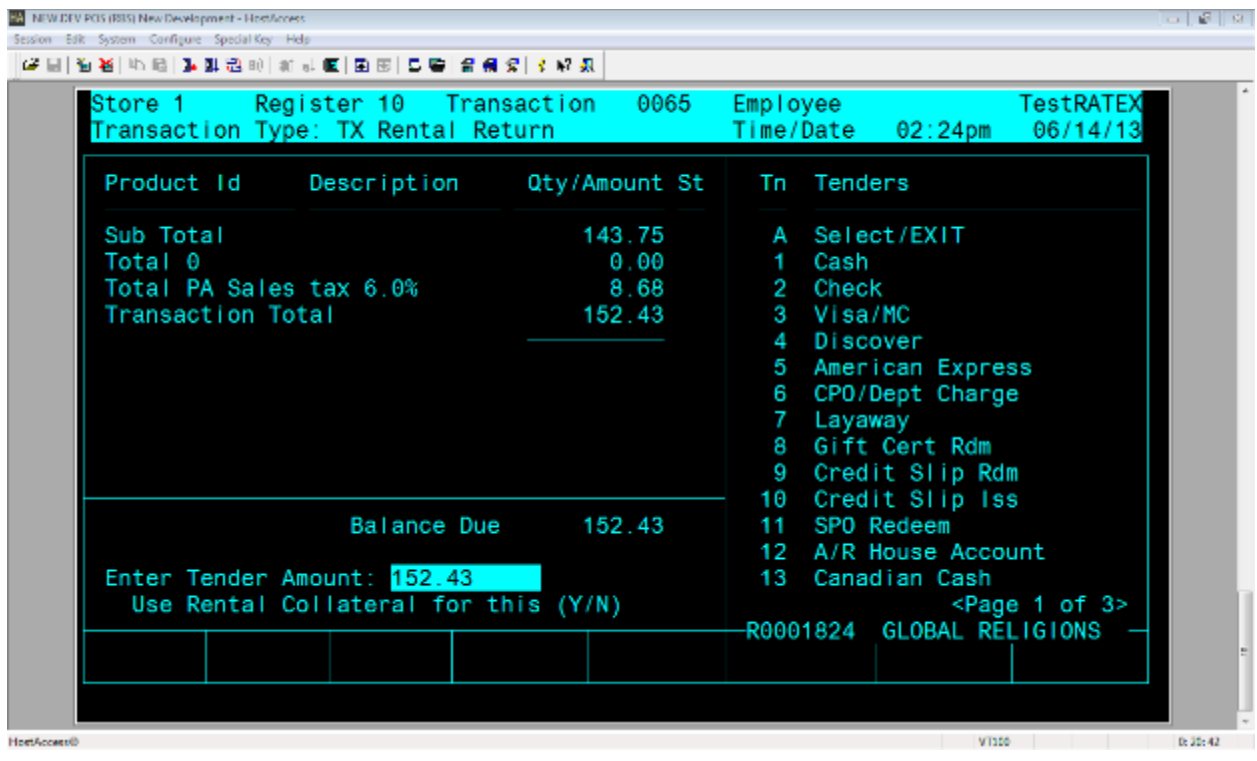


If necessary, enter additional rental serial numbers that have not been returned.

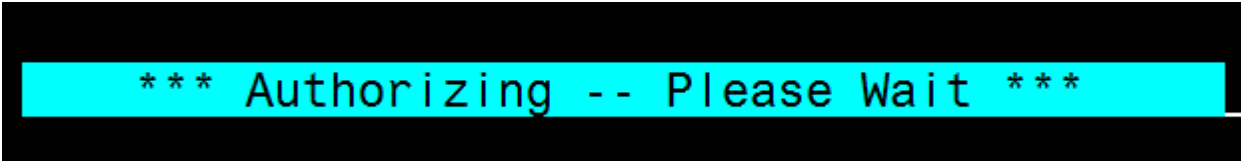
When finished, total the transaction. The balance due, which includes any sales tax charges, will be shown:



Type the tender amount and press Enter. The user will be prompted if they want to use rental collateral to charge the balance due:



Type Y to use the rental collateral credit card, and press Enter. An \*\*\*Authorizing – Please Wait\*\*\* message will display:



During this time, the “ERATEX” collateral service is being called to authorize and charge the collateral credit card that is hosted on the payment gateway (CyberSource, Moneris). When successful, the transaction will complete and a return transaction is created.

The user can log into the payment gateway and see the authorization and charge:

| CyberSource Merchant ID<br>Date and Time | Request ID<br>Merchant Reference Number                                   | Name<br>Email Address                  | Card Type  | Amount<br>Account Suffix | Applications              |
|------------------------------------------|---------------------------------------------------------------------------|----------------------------------------|------------|--------------------------|---------------------------|
| rbs_store<br>Jun 14 2013 11:48:22 AM     | <a href="#">3712357020700176056470</a><br>Order: 100063 Shipment: 1086002 | JESSICA SOBONYA<br>jksobonya@ratex.com | MasterCard | 152.43 USD<br>5100       | Credit Card Settlement    |
| rbs_store<br>Jun 14 2013 11:48:21 AM     | <a href="#">3712357014820176056470</a><br>Order: 100063 Shipment: 1086002 | JESSICA SOBONYA<br>jksobonya@ratex.com | MasterCard | 152.43 USD<br>5100       | Credit Card Authorization |

*Successful Credit Card Collateral Charge in CyberSource*



# APPENDIX A – CYBERSOURCE SECURE ACCEPTANCE SETUP

Once a client has set up an account with the CyberSource Business Center, there are a few settings to complete before orders can be placed on eRATEX using CyberSource. A SOAP Toolkit Security Key must be generated, and a Secure Acceptance profile must be created and defined appropriately. The SOAP Toolkit security key and Secure Acceptance security keys must be entered into the eRATEX Admin. Each step in the process is described below. Once these steps are completed, users can place credit card orders on eRATEX.

## SOAP TOOLKIT SECURITY KEY GENERATION

To process credit card transactions, a SOAP Toolkit security key must be generated and entered into the eRATEX Admin. Log into the CyberSource Business Center and go to:

*Account Management > Transaction Security Keys*

Click the link labeled “Security Keys for the SOAP Toolkit API,” as shown below:

The screenshot shows the CyberSource Test Business Center interface. At the top right, it indicates the user is logged in as 'rbs\_store' with account ID 'rbs\_store\_acct' and merchant ID 'rbs\_store'. A 'Log Out' button is visible. On the left is a navigation menu with 'Transaction Security Keys' selected. The main content area is titled 'Transaction Security Keys' and contains the following text:

Security keys ensure that transactions originate from your Web site and that no one, not even CyberSource, can run transactions on your behalf by using your keys. Click the link for the type of key that you want to use. For more information about the APIs described below, go to the [Technical Resource Center](#). If you currently process transactions with CyberSource, you can see the type of API that you are using in the Transaction Details page in the Client Application field.

- [Security Keys for the Simple Order API](#)**  
The Simple Order API uses a PKCS12 key file with the .p12 extension to digitally sign your SOAP request message before transmitting the message to CyberSource.
- [Security Keys for the SOAP Toolkit API](#)**  
The SOAP Toolkit API uses authentication provided by a base-64-encoded transaction key represented in string format. Use this authentication method if you want to create your SOAP message.
- [Security Keys for the SCMP API](#)**  
The SCMP API utilizes S/MIME standard cryptographic message exchange to guarantee privacy and provide strong authentication. Use this authentication method for the SCMP transaction API.

Any existing SOAP Toolkit API security keys will be shown in the list. To generate a new key, click the “Generate Key” button, as shown below:

You are logged in as : Account ID: rbs\_store\_acct  
User ID: rbs\_store : Merchant ID: rbs\_store

Log Out

- Home
- Support Center
- Virtual Terminal
- Decision Manager
- Recurring Billing
- Tools & Settings
- Transaction Search
- Reports
- Account Management
  - Merchant Information
  - Report Subscriptions
  - Transaction Security Keys
  - User Administration

## Security Keys for the SOAP Toolkit API

This page shows a list of active security keys that you can use to submit orders with a SOAP Toolkit. To process orders, use only keys that are not expired.

To create and activate a new transaction key, click **Generate Key** and follow the instructions on the screen. To delete one or more keys, check the box next to the key that you want to delete and click **Delete Keys**. To copy keys from the Test Business Center to the Live Business Center, check the box next to the key that you want to copy and click **Copy Keys**. You have 30 days to complete testing with the copied key before the key is removed permanently from the test environment.

| Transaction Security Key Index | Activation Date         | Expiration Date         | Select                   |
|--------------------------------|-------------------------|-------------------------|--------------------------|
| Transaction Security Key 1     | Dec 06 2011 11:19:51 AM | Dec 06 2014 11:19:00 AM | <input type="checkbox"/> |
| Transaction Security Key 2     | Dec 06 2011 05:57:15 PM | Dec 06 2014 05:57:00 PM | <input type="checkbox"/> |
| Transaction Security Key 3     | Dec 12 2011 06:59:29 AM | Dec 12 2014 06:59:00 AM | <input type="checkbox"/> |
| Transaction Security Key 4     | Apr 11 2013 01:48:08 PM | Apr 11 2016 01:43:00 PM | <input type="checkbox"/> |
| Transaction Security Key 5     | Aug 29 2012 07:01:07 AM | Aug 29 2015 07:01:00 AM | <input type="checkbox"/> |

Generate Key
Delete Keys
Copy Keys

The security key that is generated is a long string of letters, numbers and symbols, and is shown in a box below the “Generate Key” button. Copy the entire string, or click the “Download” button to download the key as a text file that will be saved to your computer. Once you leave this screen, you will not be able to re-download the security key. If you lose the file or the security key, you will have to generate a new one.

You are logged in to  
Test Business Center

- User: rbs\_store
- Support Center
- Log Out
- Virtual Terminal
- Decision Manager
- Tools & Settings
- Transaction Search
- Reports
- Account Management
  - Merchant Information
  - Transaction Security Keys
  - Report Subscriptions
  - User Administration
  - Role Administration
  - Change My Password
  - Update Security Questions
  - Configure IP Range
  - Substitute Receipt Settings
  - Pay My Invoice

## Security Keys for the SOAP Toolkit API

This page shows a list of active security keys that you can use to submit orders with a SOAP Toolkit. To process orders, use only keys that are not expired.

To create and activate a new transaction key, click **Generate Key** and follow the instructions on the screen. To delete one or more keys, check the box(es) next to the key(s) that you want to delete and click **Delete Keys**.

You cannot delete security keys from the test environment.

| Transaction Security Key Index | Activation Date         | Expiration Date         | Delete?                  |
|--------------------------------|-------------------------|-------------------------|--------------------------|
| Transaction Security Key 1     | Dec 06 2011 11:19:51 AM | Dec 06 2014 11:19:00 AM | <input type="checkbox"/> |
| Transaction Security Key 2     | Dec 06 2011 05:57:15 PM | Dec 06 2014 05:57:00 PM | <input type="checkbox"/> |

Generate Key
Delete Keys

**Your new key appears in the box below. Because you will not see the key again after you leave this page, you must immediately copy or download the key to a safe location on your computer.**

```
t5czF7G4Bg/N/OrMzQ2qdOC0fIMrJGk2aOcgKdIqQXDVMXCdkQb+XH4nxuwogv9JNu530WX
OYaGMT3DZxQI/MpUE3ZoPPTwt/p2E093XJYgTILvH18oJyg1IhryexmcSEkabX12zqQJAKN
BHdL8dLmMuKn/LXO/nyN+dqjRICbFpITYrJ/YIJ3SArnXNDap04LR8gyskaTZo5yop0ipBc
NUxcIORBv5cfifG7CiC/0k27nFRZc5hoYxPcNnFAj8y1QTdmg89Na3+nYQ73dc1iBMgu8eX
ygnKDUiGvJ7GZxISRptfXbOpAkAo0Ed0vx0uYy4qf8tc7+fI352qNEGjsQ==
```

➔
Download

The security key that was just generated is shown in the list of security keys. If a key needs to be deleted, put a check in the “Delete” checkbox for the key(s) you want to delete, and click the “Delete Keys” button.

The SOAP Toolkit Security Key string *in its entirety* must be entered into the eRATEX Admin, which will be explained in the eRATEX Configuration section below.

## SECURE ACCEPTANCE SETUP

**PLEASE NOTE:** All “live” eRATEX users have set up a CyberSource Hosted Order Page (HOP) to process credit card transactions. Please be aware that the CyberSource Hosted Order Page (HOP) is being discontinued on October 1, 2014. All eRATEX CyberSource users **MUST** migrate to CyberSource Secure Acceptance by October 1, 2014 to continue accepting credit card transactions on their eRATEX site. Cybersource Secure Acceptance is supported in eRATEX 4.2 and higher, and a user **MUST** upgrade their web site to eRATEX 4.2 to use CyberSource Secure Acceptance. The bookstore does not have to implement Secure Acceptance as soon as eRATEX 4.2 is installed; the Hosted Order Page parameters are still available and can be used until the October 1, 2014 deadline. On October 1, Secure Acceptance must be implemented. All schools who plan to go live on eRATEX this year (2014) should set up a Secure Acceptance profile, not a Hosted Order Page (HOP) profile.

To inquire about an eRATEX upgrade to eRATEX 4.2, please contact [vrsupport@ratex.com](mailto:vrsupport@ratex.com).

CyberSource has a Secure Acceptance Setup guide located here:

[http://apps.cybersource.com/library/documentation/dev\\_guides/Secure\\_Acceptance\\_WM/Secure\\_Acceptance\\_WM.pdf](http://apps.cybersource.com/library/documentation/dev_guides/Secure_Acceptance_WM/Secure_Acceptance_WM.pdf)

This guide will be referenced thoroughly in this Appendix.

## SECURE ACCEPTANCE PROFILE

To begin, a Secure Acceptance profile must be created in CyberSource. The Secure Acceptance profile has various settings and definitions that are used during the checkout process. To create a Secure Acceptance profile, log into CyberSource and go to:

*Tools and Settings > Secure Acceptance > Profiles*

Click the Create New Profile button to create a Secure Acceptance profile:



The following page will display:

## Create Profile

\* Required Fields

### Profile Information

Name and describe your Secure Acceptance profile below. Indicate how you intend to integrate payment acceptance on your website, via Web/Mobile or Silent Order Post.

Name\*

Description

Integration Method(s)\*  Web/Mobile  Silent Order Post

Company Name\*

### Contact Information

Name

Email

Phone Number

### Added Value Services

Payment Tokenization

Decision Manager

Fill in the following information to create a profile:

Name – Enter a profile name. This is a required field. The profile name cannot exceed 20 alphanumeric characters.

Description – Enter a profile description. This is an optional field. The description cannot exceed 255 characters.

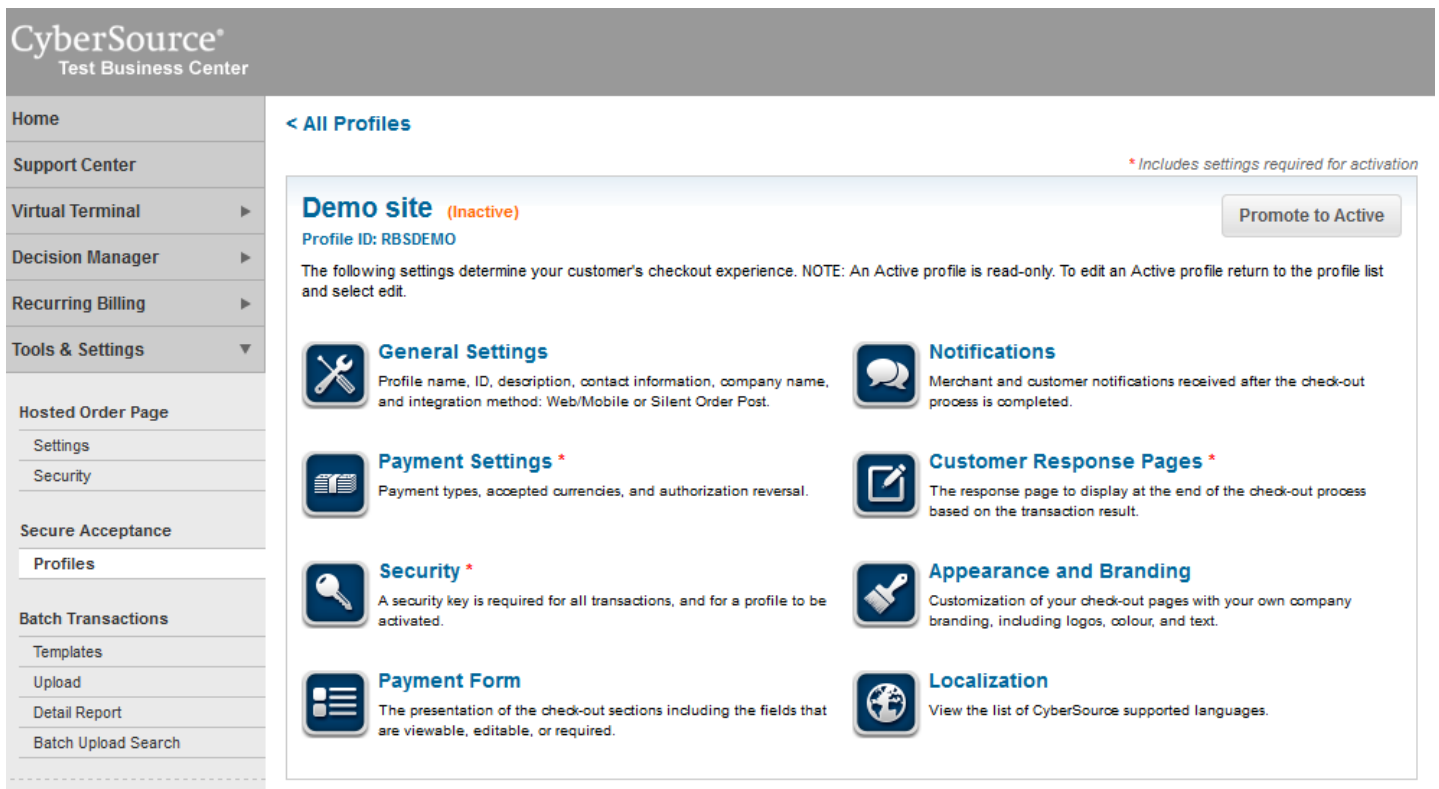
Integration Method(s) – Check Web/Mobile. This is a required field.  
 Company Name – Enter a company name. The company cannot exceed 40 alphanumeric characters.

Contact Information (Name, Email, Phone Number) – if applicable, fill in contact information. These fields are optional.

Added Value Services – Check Payment Tokenization. Do not check Decision Manager.

When finished, click Create.

A profile panel will appear, similar to the screen capture below:



When the Secure Acceptance profile is created, a Profile ID is automatically generated by CyberSource, and it can be viewed at the top of the profile and in the General Settings section. The Profile ID must be copied to the eRATEX Admin, which will be described in the eRATEX Configuration section below. **NOTE:** Older, 7 character Profile IDs that were created manually are still valid.

Each Secure Acceptance Profile option is described in the next several sections.

**IMPORTANT:** A Secure Acceptance profile is INACTIVE while it is being edited. A profile must be promoted to ACTIVE to be used during eRATeX checkout.

## **GENERAL SETTINGS**

---

General Settings include the Profile Name, Profile ID, contact information, and integration method that was described in the section above. If necessary, edit any of this information.

## **PAYMENT SETTINGS**

---

In the Payment Settings section, credit cards to accept during checkout must be defined. Click Add/Edit Card Types to select which credit cards to accept during checkout.

eChecks are not supported.

When finished, click Save.

- Home
- Support Center
- Virtual Terminal ▶
- Decision Manager ▶
- Recurring Billing ▶
- Tools & Settings ▼
- Hosted Order Page
  - Settings
  - Security
- Secure Acceptance
  - Profiles
- Batch Transactions
  - Templates
  - Upload
  - Detail Report
  - Batch Upload Search
- Stored Value
- Transaction Search ▶
- Reports ▶
- Account Management ▶
- My User Settings ▶



## Payment Settings

(Demo site)

Save Cancel

### Payment Method

To promote a profile to active, you must select at least one payment type and a currency.

#### Card

Add or edit the card types that your merchant account provider has authorized. Click the edit icon to change the CVN Display, CVN Required, Payer Authentication, and Currencies settings.

| Card Type  | CVN Display | CVN Required | Payer Authentication | Currencies |  |
|------------|-------------|--------------|----------------------|------------|--|
| Visa       | ✓           | ✓            |                      | USD        |  |
| MasterCard | ✓           | ✓            |                      | USD        |  |
| Amex       | ✓           | ✓            |                      | USD        |  |

Add/Edit Card Types

#### Automatic Authorization Reversal

Check to perform an automatic authorization reversal on each transaction that:

- Fails AVS check
- Fails CVN check

#### eCheck

eCheck is a payment option allowing US and Canadian customers to pay directly from their bank accounts. Ensure you are configured to accept these payments prior to enabling eCheck below.

- eCheck payments enabled

Save Cancel

## SECURITY

In the Security section, an Access Key must be generated. Click Create New Key to generate a new Access Key:





# PAYMENT FORM

In the Payment Form section, the checkout experience is defined for the end-user. There are several areas of information to define:

CyberSource®  
Test Business Center
You are logged in as  
User ID: rbs\_store

- Home
- Support Center
- Virtual Terminal >
- Decision Manager >
- Recurring Billing >
- Tools & Settings ▾
- Hosted Order Page
  - Settings
  - Security
- Secure Acceptance
  - Profiles
- Batch Transactions
  - Templates
  - Upload
  - Detail Report
  - Batch Upload Search
- Stored Value
- Transaction Search >
- Reports >
- Account Management >
- My User Settings >

## Payment Form

(Demo site)

### Payment Form Flow

Select the number of steps in your customers checkout experience.

Multi Step Payment Form  
Your customer completes the checkout process over a number of pages.

Single Page Form  
Your customer completes the checkout process on a single, longer page.

### Purchase Information

Display the total tax amount in each step of the checkout process.

### Checkout Steps

Select the steps to include in your checkout. You need to POST in fields required by your processor, if you do not capture these via Secure Acceptance.

Billing Information  Shipping Information  Payment Information

#### Billing Information

Select to display, capture/edit, and require Billing Information

| Field            | Display                             | Edit                     | Require                  | Field         | Display                             | Edit                     | Require                  |
|------------------|-------------------------------------|--------------------------|--------------------------|---------------|-------------------------------------|--------------------------|--------------------------|
| First Name       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | State         | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Last Name        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Postal Code   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Company          | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Country       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | n/a                      |
| Street Address 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Phone Number  | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Street Address 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Email Address | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| City             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |               |                                     |                          |                          |

#### Shipping Information

Select to display, capture/edit, and require Shipping Information

| Field            | Display                             | Edit                     | Require                  | Field        | Display                             | Edit                     | Require                  |
|------------------|-------------------------------------|--------------------------|--------------------------|--------------|-------------------------------------|--------------------------|--------------------------|
| First Name       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | State        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Last Name        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Postal Code  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Company          | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Country      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Street Address 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Phone Number | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
| Street Address 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |              |                                     |                          |                          |
| City             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |              |                                     |                          |                          |

#### Order Review

The Order Review page is displayed for token based checkouts and retry attempts following a declined transaction.

Add the Order Review page to all transactions.

| Section              | Display                             | Edit                     |
|----------------------|-------------------------------------|--------------------------|
| Billing Information  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Shipping Information | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Payment Information  | n/a                                 | <input type="checkbox"/> |

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### Payment Form Flow

When the customer goes to CyberSource to enter their credit card information, the information can be presented on a single page, or multiple pages. Select Single Page Form or Multi Step Payment Form. RBS recommends Single Page Form.

### Purchase Information

Do not check this checkbox; this option is not supported. Tax amounts not sent to CyberSource from eRATEX.

### Checkout Steps

The Billing and/or Shipping address can display to the user when they enter their credit card information. If Single Page Form is selected, the Billing address, Shipping address, and payment information will display on one page; if Multi Step Form is selected, the information will display on separate pages that the user must click through. Place checkmarks next to the Billing Information or Shipping Information to display this information to the user during checkout.

### Billing and Shipping Information

Billing and/or Shipping addresses can be displayed to the customer during checkout. Place checkmarks next to the Billing and/or Shipping attributes to display to the user during checkout. Edit and Require should not be checked, because they are not supported.

When finished, click Save.

## NOTIFICATIONS

---

Do not enter any information here.

## CUSTOMER RESPONSE PAGES

---

In the Customer Response Pages section, URLs must be defined when the Secure Acceptance process is completed or canceled:

**CyberSource**  
Test Business Center

You are logged in as  
User ID: rbs\_store

---

- Home
- Support Center
- Virtual Terminal ▶
- Decision Manager ▶
- Recurring Billing ▶
- Tools & Settings ▼
- Hosted Order Page
  - Settings
  - Security
- Secure Acceptance
  - Profiles
- Batch Transactions
  - Templates
  - Upload
  - Detail Report
  - Batch Upload Search
- Stored Value
- Transaction Search ▶
- Reports ▶
- Account Management ▶
- My User Settings ▶

## Customer Response Pages

(Demo site)

Save Cancel

---

\* Required Fields

### Transaction Response Page

Select the method for hosting the transaction response page, which is displayed at the end of the check-out process.

Hosted by CyberSource  
A response message is displayed when the transaction is declined, cancelled, or if there is an error (listed below).

Hosted by you  (URL)  
Selecting this option enables you to manage your own response pages.

### Transaction Response Message

**DECLINE**

**Retry Limit**  
Customers may retry a declined transaction up to  times.

**ERROR**

**Message:** An error occurred during payment processing. Please verify your information.

### Custom Cancel Response Page

Select the method for hosting the transaction cancellation page, which is displayed when a user clicks the cancel button in the checkout process.

Hosted by CyberSource  
"Your order was cancelled." is displayed when the transaction is cancelled. A button will take the user to the Customer Redirect URL specified below.

Hosted by you  (URL)  
Selecting this option enables you to manage your own response page.

Save Cancel

Fill out the following sections:

Transaction Response Page – select “Hosted by you” and enter your web site URL with /cybersourcehopreturn.aspx at the end (ex. <https://demo.eratexstore.com/cybersourcehopreturn.aspx>). When a user finishes entering their credit card information and clicks “Complete Order”, this is the page that displays the “Completing Order...” graphic, which redirects the user back to your web site to the Order Confirmation page.

Custom Cancel Response Page – select “Hosted by you” and enter your web site URL with /shoppingcart.aspx at the end (ex. <https://demo.eratexstore.com/shoppingcart.aspx>). When the user is checking out on Secure Acceptance and clicks “Cancel”, they will be redirected back to the shopping cart.

When finished, click Save.

## APPEARANCE AND BRANDING

In the Appearance and Branding section, the Secure Acceptance pages can be styled:

The screenshot displays the 'Appearance and Branding' configuration page for a demo site. The interface includes a left-hand navigation menu with options like Home, Support Center, and Tools & Settings. The main content area is titled 'Appearance and Branding (Demo site)' and features several sections for customization:

- Header Content:** Includes a 'Display Header' checkbox (checked), 'Header Color (Hex)' set to #ffffff, an 'Upload Header Image' button, and alignment options (Left-aligned, Centered, Right-aligned). A preview shows the 'powered by eratex' logo.
- Main Body:** Allows customization of 'Background Color (Hex)' (#F5F5F5), 'Text Font' (Arial), and 'Text Color (Hex)' (#4D5357).
- Total Amount:** Allows customization of 'Background Color (Hex)' (#EDF9EC) and 'Text Color (Hex)' (#4D5357).
- Pay Button:** Allows customization of 'Background Color (Hex)' (#448944) and 'Text Color (Hex)' (#FFFFFF). It also includes a 'Change button text' checkbox.
- Footer Content:** Includes a 'Display Footer' checkbox.

Buttons for 'Set to Default', 'Save', and 'Cancel' are present at the top right and bottom right of the configuration area.

Headers and footers can be defined with an image, and the body text can have different colors and fonts applied.

When finished making changes, click Save.

## PROMOTE TO ACTIVE

When the Secure Acceptance profile has been set up, click the Promote to Active button to activate the profile.

## eRATEX CONFIGURATION

To use CyberSource with eRATEX, the CyberSource merchant ID and security keys that were generated must be entered into the eRATEX Admin.

In the eRATEX Admin, go to the Configuration Wizard located at Configuration > Run Config Wizard. In the Payment Processing Solutions option, click “Configure” next to the CyberSource HOP. CyberSource HOP and Secure Acceptance parameters will display:

| TEST Mode Configuration          |                                                                   |
|----------------------------------|-------------------------------------------------------------------|
| Merchant ID:                     | <input type="text" value="rbs_store"/>                            |
| SOAP Toolkit Transaction Key:    | <input type="text" value="MND5w-6-10W/4h7tgnCJtCt8aUjQmDyCeyA7"/> |
| Ignore AVS:                      | <input checked="" type="radio"/> No <input type="radio"/> Yes     |
| Hosted Order Page Serial Number: | <input type="text" value="201064075-1010000-1000000000"/>         |
| Hosted Order Page Public Key:    | <input type="text" value="MND5w-6-10W/4h7tgnCJtCt8aUjQmDyCeyA7"/> |
| Hosted Order Page Color Scheme:  | <input type="text" value="gray"/>                                 |
| Use Secure Acceptance Profile:   | <input type="radio"/> No <input checked="" type="radio"/> Yes     |
| Secure Acceptance Profile ID:    | <input type="text" value="rbsaccmp"/>                             |
| Secure Acceptance Access Key:    | <input type="text" value="MND5w-6-10W/4h7tgnCJtCt8aUjQmDyCeyA7"/> |
| Secure Acceptance Secret Key:    | <input type="text" value="MND5w-6-10W/4h7tgnCJtCt8aUjQmDyCeyA7"/> |

Save and Close    Cancel    Toggle Advanced

TIP: The CyberSource configuration supports a set of test credentials and live credentials. Click “Configure test mode” if you would like to test with a test CyberSource account. Click “Configure” to update/modify your live account credentials.

Fill in the following parameters:

Merchant ID – enter your CyberSource Merchant ID.

SOAP Toolkit Transaction Key – Enter the SOAP Toolkit Transaction Key that was generated in the CyberSource Business Center. **NOTE:** It is no longer necessary to upload a security key file into a secure directory. Simply copy and paste the entire key into this field.

Use Secure Acceptance Profile – Select Yes to use the Secure Acceptance profile during eRATEX checkout. Select No to use the Hosted Order Page. **NOTE:** The Hosted Order Page is being discontinued on October 1, 2014.

Secure Acceptance Profile ID – Enter the CyberSource Secure Acceptance profile ID exactly as it was created during the Secure Acceptance profile setup.

Secure Acceptance Access Key – Enter the CyberSource Secure Acceptance Access Key that was generated in the CyberSource Business Center.

Secure Acceptance Secret Key – Enter the CyberSource Secure Acceptance Secret Key that was generated in the CyberSource Business Center.

When finished, click Save and Close.

Users who check out on eRATEX will be taken to CyberSource Secure Acceptance to complete the checkout process.

# APPENDIX B – MONERIS VAULT HOSTED PAGE SETUP

To use Moneris Vault, there are a few settings to complete before one can place test orders (and eventually live orders) using Moneris. The Moneris Vault Hosted Page must be defined appropriately and defined in the eRATEX Admin. Each step in the process is described below.

## MONERIS VAULT TEST HOSTED PAGE SETUP

To set up a test account with Moenris Vault, a Login to the Moneris Test Merchant Resource Center using the login credentials displayed on the screen (Username: demouser, Store ID: store 3, Password: password) --

moneris.com https://esqa.moneris.com/mpg/

eSelect PLUS

HELP

Merchant Resource Center

**Moneris** SOLUTIONS

Ligon

Username:

Store ID:

Password:

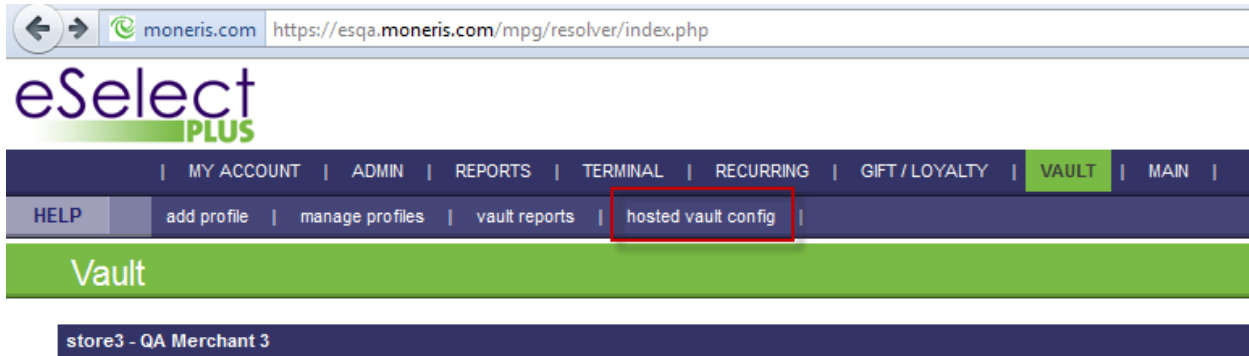
Submit

Forgot Password?

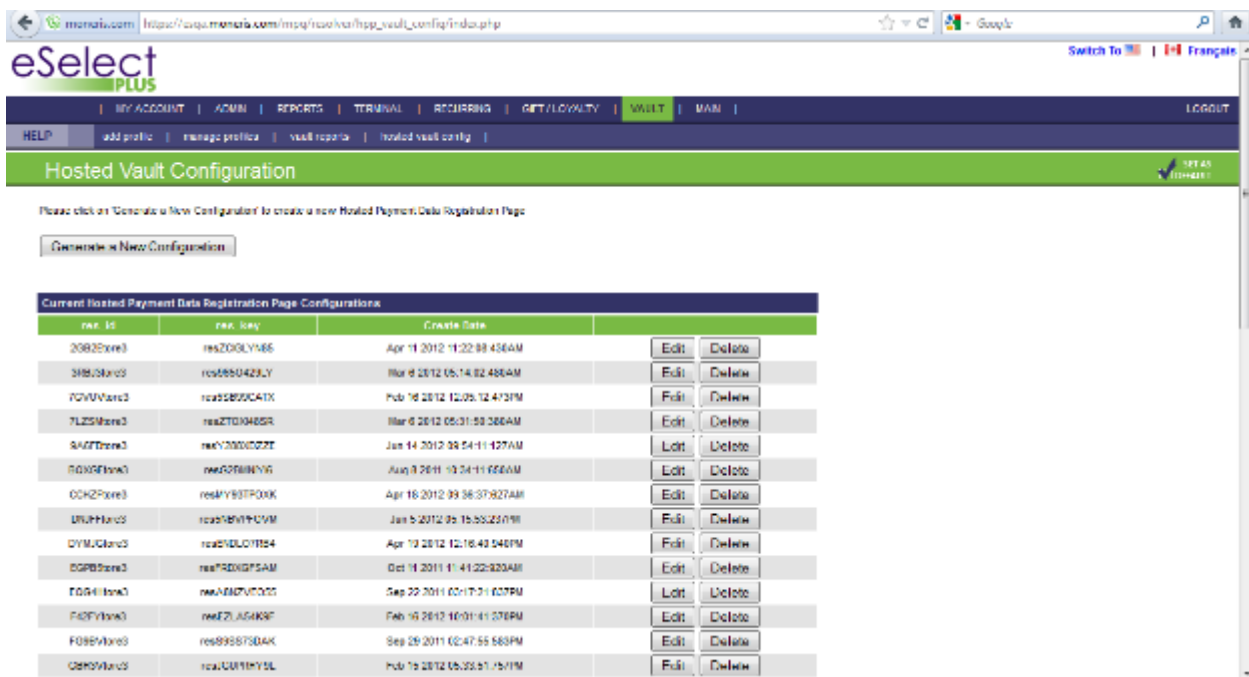
**NOTICE**

To access the test store, please use the following credentials.  
**Username:** demouser  
**Store ID:** store3, store2 or store1  
**Password:** password

Once logged in, click VAULT in the menubar, then click HOSTED VAULT CONFIG:

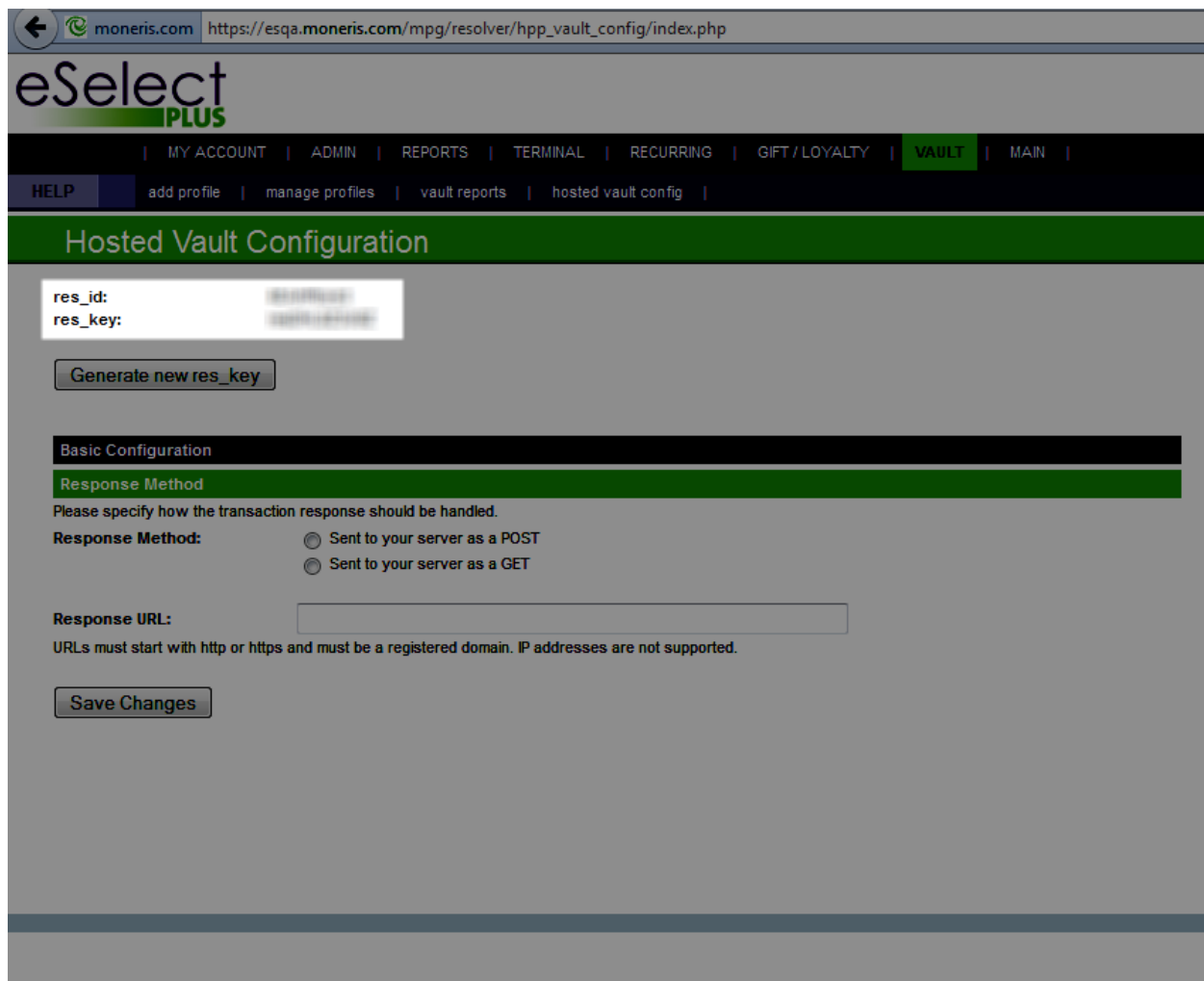


A Hosted Vault Configuration page will display:



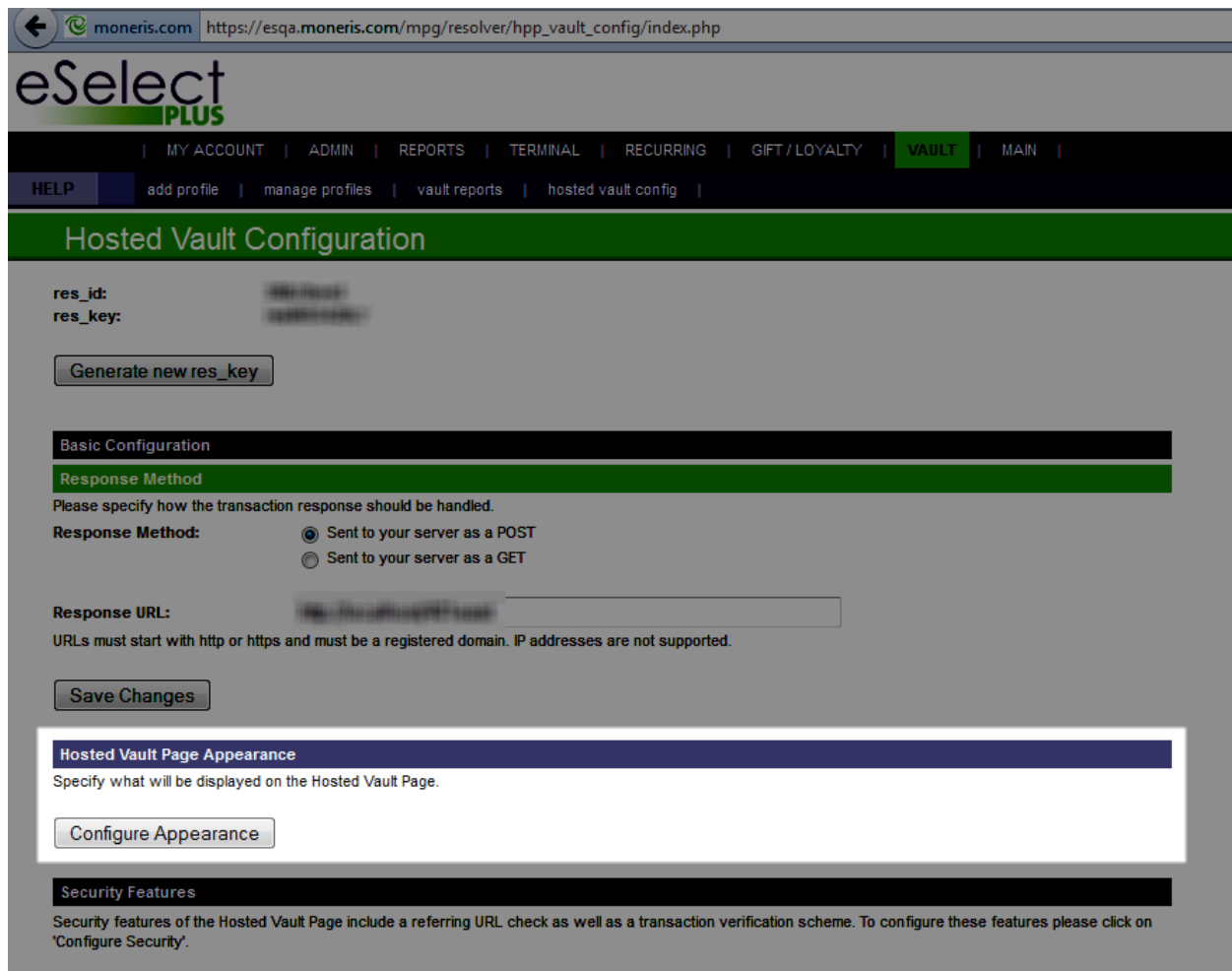
In the Hosted Vault Configuration page, click the “Generate a New Configuration” button. Write down the res\_id and res\_key values:





In the Response Method section of the screen, select “Sent to your server as a POST.” In the Response URL section, enter the following: <https://yoururl/monerishopreturn.aspx> and click the Save Changes button.

OPTIONAL: Configure the appearance of the Vault page by clicking the “Configure Appearance” button:



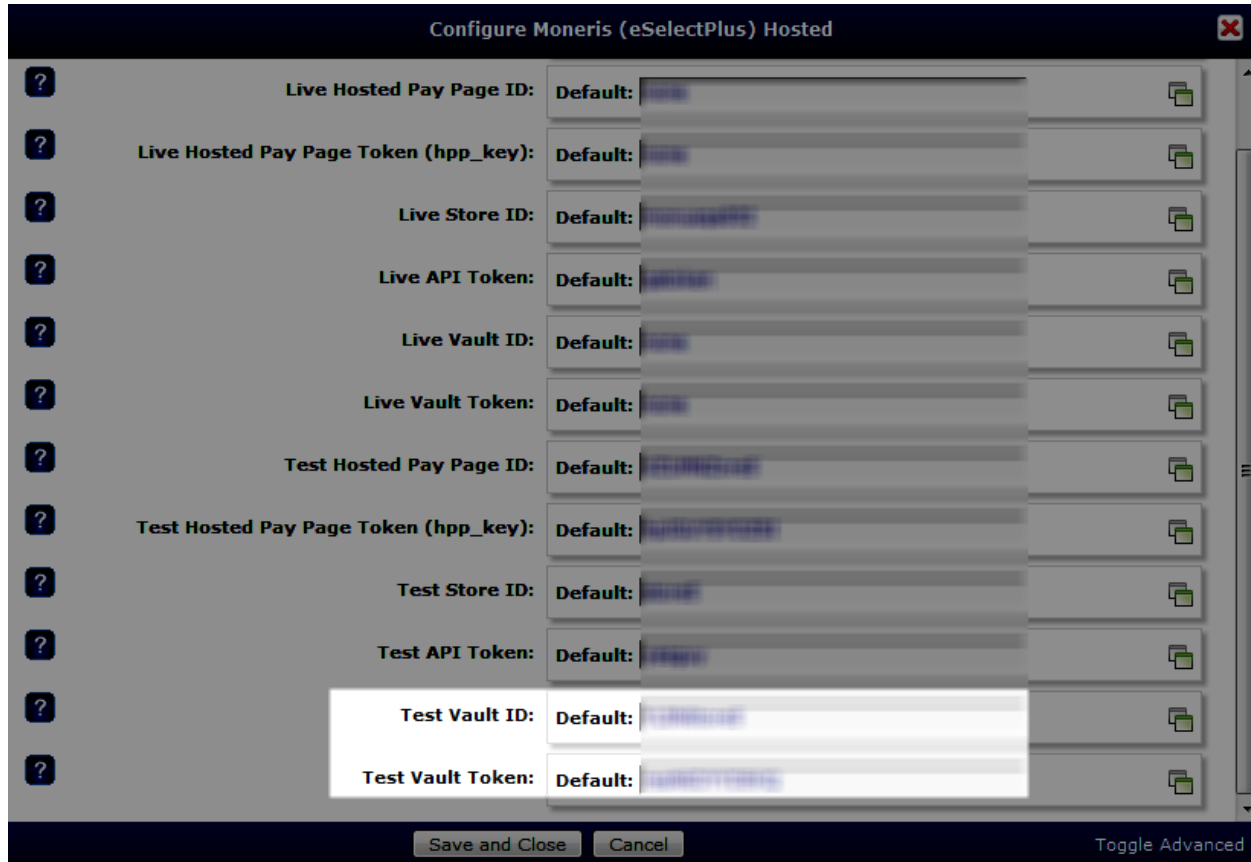
Once your test Moneris Vault account is set up, eRATEX must be configured to use it.

## ERATEX CONFIGURATION

In the eRATEX Admin, go to Configuration > Run Config Wizard. In the Payment Gateway section, click the “Configure” link next to Moneris HOP:



Enter the res\_ID into the “Test Vault ID” field, and the res\_key into the “Test Vault Token” field:



When finished, click the Save and Close button.

## MONERIS VAULT LIVE SETUP

Once testing is complete using the test credentials explained above, Moneris Vault needs to be activated for live use. A live account must be created for Moneris Vault. Creating a live Moneris Vault account is very similar to creating a test account. Each step is explained below.

### STORE ACTIVATION

Moneris will send a letter/fax requiring store activation. Go to <https://www3.moneris.com/mpg/activate> and follow the instructions to activate your store. An admin account must be created, and your store ID and merchant ID must be entered in order to activate the store.

### MONERIS VAULT CONFIGURATION

Once the store is activated, log into the Merchant Resource Center (<https://www3.moneris.com/mpg>) using the username and password that was created during the activation process. Click “Vault” and then “Hosted Vault Config.” Click “Generate a New Configuration”; a Configuration ID (res\_id) and Hosted Vault Token (res\_key) will be provided. These are the live credentials.

Once the credentials have been created and your Vault Hosted page set up, eRATEX must be configured to use the live credentials.

## ERATEX CONFIGURATION

In the eRATEX Admin, go to Configuration > Run Config Wizard. In the Payment Gateway section, click the “Configure” link next to Moneris HOP:



Enter the res\_ID into the “Live Vault ID” field, and the res\_key into the “Live Vault Token” field.

## INDEPENDENT REFUNDS

To do returns in POS\*Liberty and have funds credited in Moneris Vault, “Independent Refunds” must be enabled. By default, “Independent Refunds” is disabled on all merchant accounts. Contact Moneris and ask them to enable “Independent Refunds” on your account, so POS returns and credits can be processed successfully.

# APPENDIX C – ORDER PROCESSING TEST SCENARIOS

## INTRODUCTION/ASSUMPTIONS

This Appendix is a guide to testing sales order processing in eRATEX and Order Fulfillment. When testing sales order processing scenarios, a few assumptions have been made:

- The eRATEX client will have a valid, live CyberSource account
- A hosted order page configured through their CyberSource Business Center
- Security scripts have been generated and placed in the appropriate eRATEX admin parameters
- .p12 key file has been created and placed in a secure location on the server, referenced from an eRATEX admin parameter.
- A valid subscription service configured with CyberSource allowing for both recurring billing and long-term storage of payment information
- A valid, SSL certificate has been purchased and installed on the eRATEX server

## ERATEX SETUP/CONFIGURATION

---

Before placing sales orders, eRATEX should be configured for ‘live’ payment processing, a SSL certificate should be installed and active, and eRATEX should be configured properly to use CyberSource or Moneris for payment processing.

To process eRATEX payments using CyberSource, make sure that the following settings are correct in the Configuration Wizard in the eRATEX Admin:

- ‘Credit Card’ is selected under ‘Payment Methods Accepted’. You may also select other payment methods you wish your customers to be able to use, but this must be coordinated with RBS support to ensure that is a payment method currently supported.
- ‘Payment Gateway’ *must* be set to ‘CyberSource’.
- ‘Use Live Transactions’ should be set to ‘Yes’.
- ‘Use SSL’ should be set to ‘Yes’.
- ‘Encrypt the WEB.CONFIG’ should be, once your site is live, set to ‘Yes’.

## TESTING ERATEX TRANSACTIONS

---

When placing test orders on eRATEX, a *test* CyberSource account can be used to place test web orders. In the eRATEX Admin, AppConfig ‘Use Live Transactions’ *must* be set to ‘No’; this tells the eRATEX application to send transaction requests to a preset ‘test’ CyberSource URL rather than the ‘live’ URL. Before going live, live

transactions should be tested with valid credit card data, real-world ordering and fulfillment scenarios. RBS recommends testing the following order scenarios prior to go-live:

- 1) A simple, one-item credit card order with item in stock.
  - a. This will verify that the basic and fundamental components to the ordering and fulfillment process are in place.
  - b. Place an order for a product with stock, pick, verify, and ship the order from Order Fulfillment. Settle the credit card transaction with CyberSource and verify sales processing figures.
  
- 2) A multiple line-item order, two or more items in-stock.
  - a. This will verify multi-line functionality and will allow you to test features such as cancelling/editing a line item, secondary payment processing such as re-auth and capture.
  - b. Place an order with two or more items you know to be in stock in VisualRATEX. Pick, verify, ship and close the sales order. Verify that the stock ledger and sales processing figures have been decremented/incremented accurately.
  
- 3) A multiple-line item order, at least one item *NOT* in stock.
  - a. This will allow for the testing of backorder-management features, secondary payment processing (auth for later capture, subscription creation, etc.) and will allow you to go through the process of filling an incomplete order.
  - b. Place an order for two or more items in eRATEX, at least *one* of which you know to be out of stock in VisualRATEX. Verify stock ledger, payment processing and sales processing figures are decremented properly and accurate.
  
- 4) Changing Shipping and Handling charges in VR.
  - a. Using any order scenario (single item, multi-line, etc.), edit the Freight Charge value on a sales order. Save the sales order and verify that the payment processing figures have updated properly.
  - b. Verify that sales totals via sales processing are accurate.
  
- 5) Canceling a shipment
  - a. Using any order scenario, cancel a shipment (one or more items on an order) at each stage in order processing.
    - i. RDPK (Ready to Pick) – hit F9 to cancel editable lines

- ii. PICK (Picking) – Simply do not scan the item(s) to be cancelled in the pick verification stage. Return to Sales Order MNT and cancel line item by hitting F9
- iii. RDSH (Ready to Ship) – Hit F9 in the ‘Shipment Maintenance’ screen – ‘close date’ field. Hit ‘yes’ to confirm cancellation of the shipment.
- iv. Note – You cannot cancel line items or shipments once they have been shipped.
- b. Verify that canceled items have been canceled and that order/payment totals have updated under ‘Payment Information’ in Sales Order MNT (including taxes and freight if applicable).

#### 6) Adding Items to Existing Orders

- a. From Sales Order Maintenance, go to ‘Product Information’ and hit ‘F4’ to add a new line item to a sales order. If necessary, search for a particular product by entering a keyword or SKU. Press F10 to save the order.
- b. Verify that the added item(s) has updated the order/payment totals accurately (including taxes and freight if applicable).

## APPENDIX D

# SALES ORDER STATUSES AND LINE STATUSES

## SALES ORDER STATUSES

When sales orders are processed in Order Fulfillment, the order can have a variety of statuses depending on the stage of the order. Below is a list of the most common statuses, why they occur, and how to resolve them.

### SALES ORDER STATUS: HCWA (HOLD - WAITING ON AUTHORIZATION)

| Order # | Internet Order | Name         | Customer ID | Order Date | Days Pend | Qty | Lines | Order Store | O/C | Retail | Status |
|---------|----------------|--------------|-------------|------------|-----------|-----|-------|-------------|-----|--------|--------|
| 0001060 | 101094         | DAVID KAPLAN | 000015063   | 02/01/10   | 0         | 2   | 2     | 1           | O   | 44.12  | HCWA   |

Why This Status Occurs: An order will have a HCWA status if the order needs to reauthorize the credit card because the order total has changed to a higher amount. **This occurs when the bookstore is using “full authorizations.”** An order could need to reauth for the following reasons:

- A used-to-new textbook substitution occurred. When a substitution resulting in a higher order total occurs, the order needs to be reauthed so the customer will be charged the higher order total.
- A split shipment occurred. When an order is split into more than one shipment, the subsequent shipments need to be authed.

How To Resolve: Open the order and review the Payment Details to confirm that the new order total is accurate. Press F10 to save and reauth the sales order. The sales order will have a status of INPR.

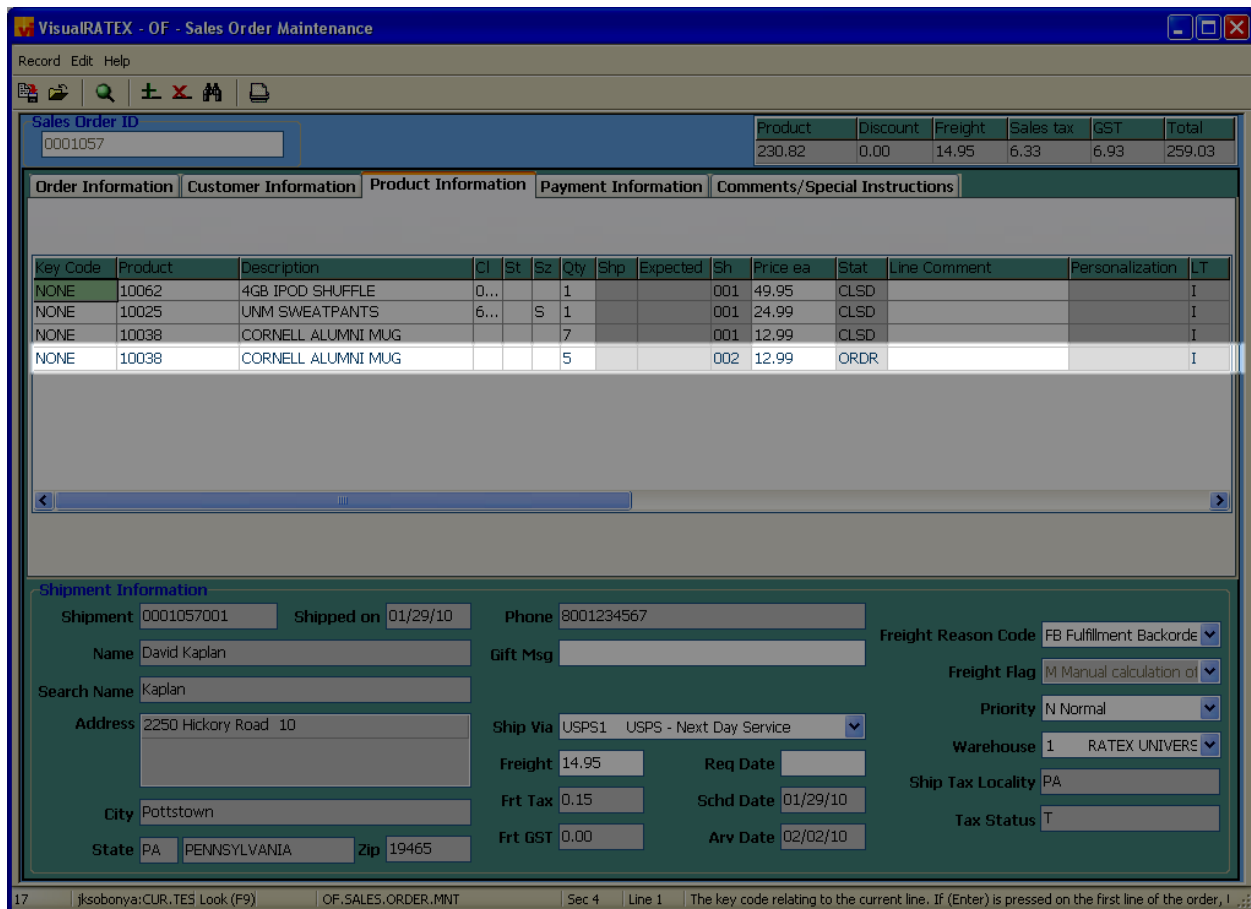
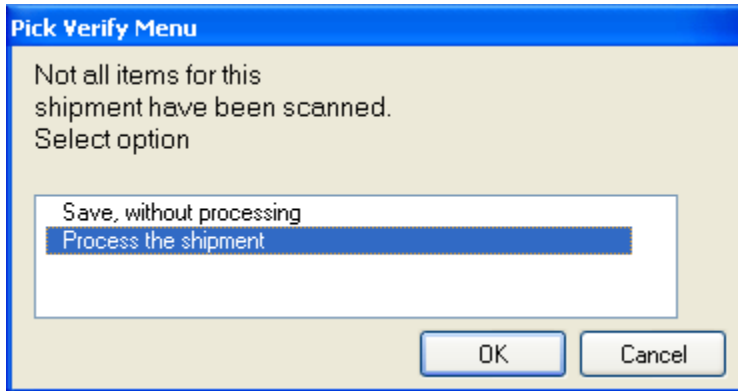
### SALES ORDER STATUS: HOBO (HOLD - BACK ORDER)

| Order # | Internet Order | Name         | Customer ID | Order Date | Days Pend | Qty | Lines | Order Store | O/C | Retail | Status |
|---------|----------------|--------------|-------------|------------|-----------|-----|-------|-------------|-----|--------|--------|
| 0001057 | 101091         | DAVID KAPLAN | 000015063   | 01/29/10   | 3         | 14  | 4     | 1           | O   | 259.03 | HOBO   |

Why This Status Occurs: An order will have a HOBO status if one or more items were not scanned for shipment during the Pick Verify process.

If an item is not scanned during Pick Verify and the shipment is processed, the sales order status will change to HOBO. The line that was not scanned will be placed on a separate shipment with an ORDR status:



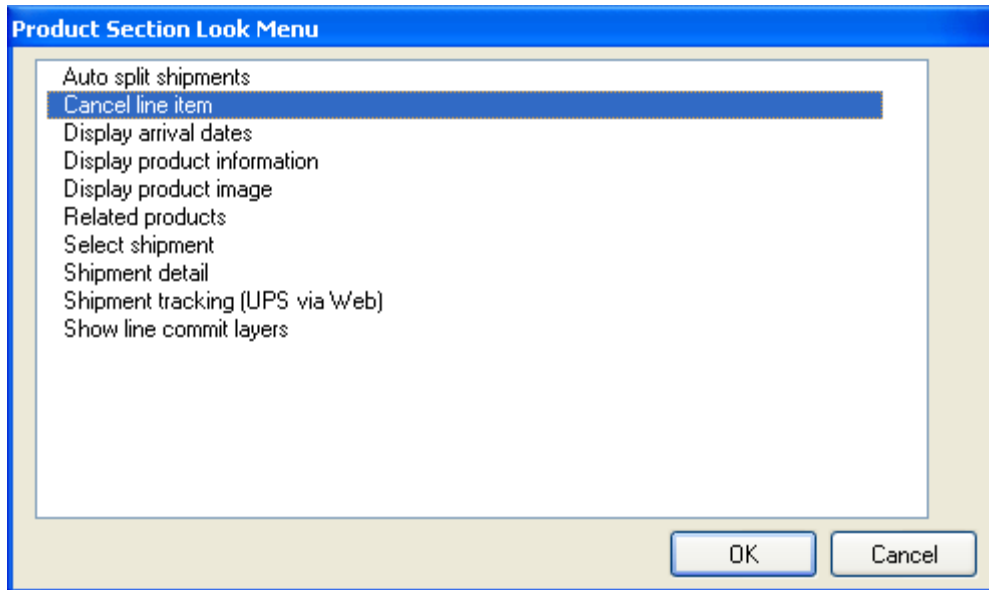


Why would one process the shipment without scanning an item? The customer may not want the item anymore so you need to cancel the line, or you may have run out of stock for the item.

How To Resolve: There are two ways to change the order from HOB0 to an INPR status:

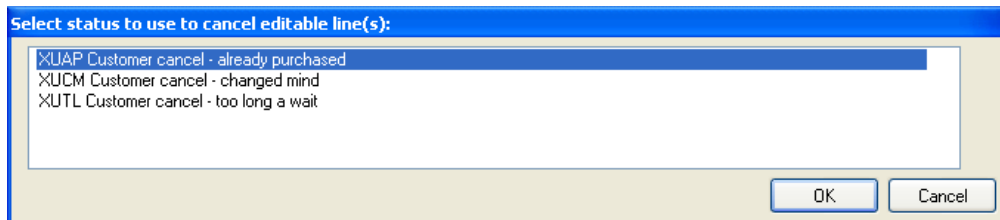
Cancel the line. If the customer called and no longer wants this item, you may cancel the line. To cancel the line, open the order and go to the Product Information tab. Highlight the ORDR line that you want to cancel

and press F9. The following prompt will appear:



Select Cancel Line Item and click OK.

The following prompt will appear asking for a reason you are canceling the line:



Select one of the reasons and click OK. The line will be canceled.

1. Process the line. If you did not scan the line in Pick Verify because you did not have stock, and you want to ship the item once stock arrives, you can open the order and press F10 to auth the card for the new shipment and the line will change from ORDR to RDPK. You can pick the order once stock arrives for the item.

## SALES ORDER STATUS: HCCL (HOLD - CREDIT LIMIT)

| Order # | Internet Order | Name      | Customer ID | Order Date | Days Pend | Qty | Lines | Order Store | O/C | Retail | Status |
|---------|----------------|-----------|-------------|------------|-----------|-----|-------|-------------|-----|--------|--------|
| 0001071 | 101105         | EVA ANGEL | 000000129   | 02/01/10   | 0         | 3   | 2     | 1           | 0   | 95.94  | HCCL   |

Why This Status Occurs: When a customer places an order that exceeds their AR Credit Limit, the order will be placed on Hold. The order will remain in this status until enough funds are available for all items on the order.

How To Resolve: There are two ways to change the order from HCCL to an INPR status:

1. **Increase the Customer's Credit Limit.** If you can, increase the customer's credit limit to a higher amount. Once enough credit is available, if you open the order and F10, the order will save with a status of INPR and you can continue processing the order.
2. **Cancel a line.** If the customer's credit limit cannot be increased, inform the customer of the situation. He may agree to cancel a line so he will have enough credit to process the remaining items.

## SALES ORDER STATUS: HFAV (HOLD - FRAUD)

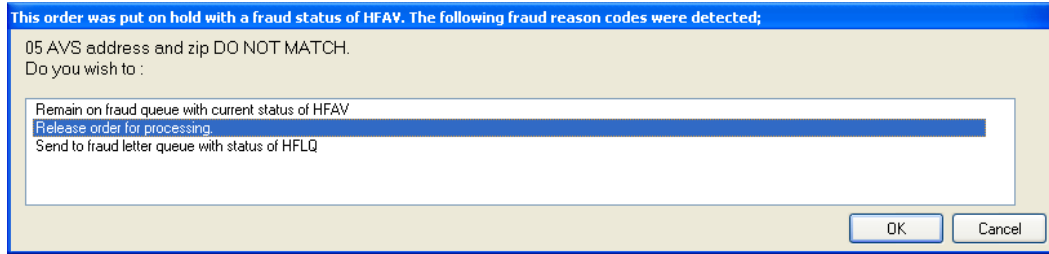
| Order # | Internet Order | Name      | Customer ID | Order Date | Days Pend | Qty | Lines | Order Store | O/C | Retail | Status |
|---------|----------------|-----------|-------------|------------|-----------|-----|-------|-------------|-----|--------|--------|
| 0000720 | 100750         | KIM BROWN | 000000027   | 10/22/09   | 102       | 1   | 1     | 1           | O   | 46.00  | HFAV   |

Why This Status Occurs: A sales order will have a status of HFAV if there is a mismatch in the Address Verification data between the customer's Bill To address in Order Fulfillment and the Bill To address on file with the customer's credit card issuer. When you request a credit card authorization, the customer's issuing bank may use the Address Verification Service (AVS) to confirm that your customer has provided the correct billing address. If the customer provides incorrect information, the transaction might be fraudulent. An HFAV order can have one of the following Fraud Reason Codes associated with it:

- AVS Address matches, zip does not
- AVS 5 digit zip matches, address does not
- AVS 9 digit zip matches, address does not
- AVS address and zip DO NOT MATCH

How To Resolve: Depending on the fraud type, you can do one of the following:

1. **Update the customer's billing address and release the order.** Contact the customer and ask for their updated billing address. Enter the new billing address into Order Fulfillment. To release the order, press F10. The following prompt will appear:



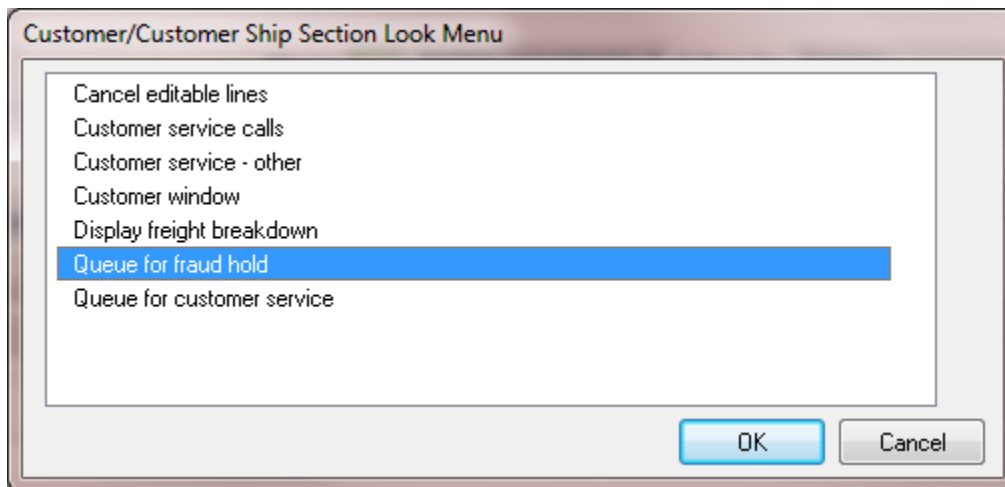
Select Release order for processing and click OK. The order will release and change to INPR.

2. Release the order without changing the billing address. This is NOT recommended unless you are certain that the address is correct.
3. Cancel the order. If the order is fraudulent, you can cancel the order.

## SALES ORDER STATUS: HFOS (HOLD - FRAUD OPERATOR SUSPECT)

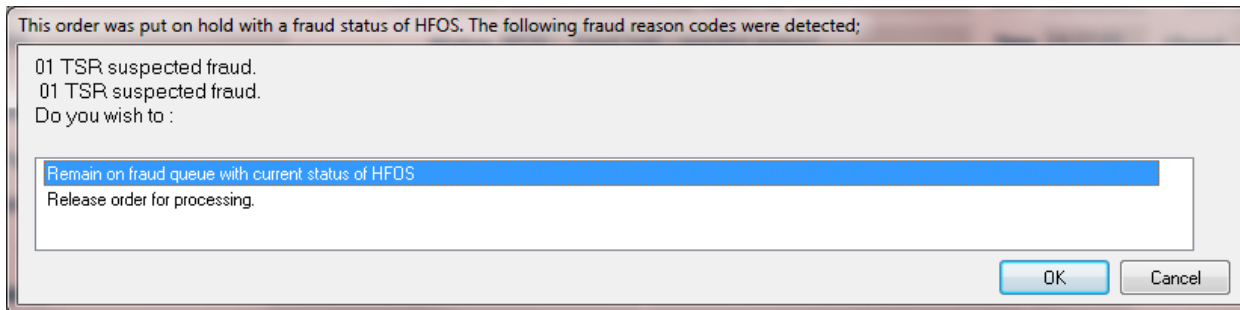
| Order # | Internet Order | Name            | Customer ID | Order Date | Days Pend | Qty | Lines | Store | O/C | Retail | Status |
|---------|----------------|-----------------|-------------|------------|-----------|-----|-------|-------|-----|--------|--------|
| 1000471 | 110395         | JESSICA SOBONYA | 000000582   | 03/30/12   | 3         | 4   | 4     | 1     | 0   | 93.66  | HFOS   |

Why this Status Occurs: An order may be INPR but looks suspicious. If you suspect an order of fraud, you can put the order on a fraud hold by opening the order, pressing F9, and selecting “Queue for fraud hold”:



This will put the order in a “HFOS” status.

How To Resolve: Review the order for possible fraud. To release the order, open the order and press F10. You will receive the following prompt:



Select “Release the order for processing” to release the order from the fraud status.

## SALES ORDER STATUS: HCDE (HOLD - CREDIT CARD DECLINED)

| Order # | Internet Order | Name      | Customer ID | Order Date | Days Pend | Qty | Lines | Order Store | O/C | Retail | Status |
|---------|----------------|-----------|-------------|------------|-----------|-----|-------|-------------|-----|--------|--------|
| 0000897 | 100947         | EVA ANGEL | 000000129   | 12/04/09   | 59        | 1   | 1     | 1           | 0   | 27.81  | HCDE   |

Why This Status Occurs: If using full authorizations, a sales order will have a status of HCDE when a ‘decline’ response was issued from the cardholder’s bank. An order can be declined for a variety of reasons, including:

- Insufficient funds
- AVS mismatch
- Issuer Unavailable
- Etc.

How To Resolve: Log into your CyberSource Business Center account and view the transaction details. Depending on why the order was declined, you can do one of the following:

1. Save again. Open and save (F10) the order to try the capture request again. In many cases, declines due to insufficient funds can be resolved by waiting an additional business day to allow a prior auth to release from the cardholder’s account.
2. Update address information. In the case of an AVS mismatch, obtain updated billing information, enter the information into the customer’s account, and save (F10) the order. The order should auth successfully and have an INPR status.
3. Cancel the order. Cancel the order. If necessary, have the customer place an identical order using a different credit card with enough funds to cover the purchase.

## SALES ORDER STATUS: HCSD (HOLD - CREDIT CARD SHIPMENT DECLINE)

| Order # | Internet Order | Name     | Customer ID | Order Date | Days Pend | Qty | Lines | Store | O/C | Retail  | Status |
|---------|----------------|----------|-------------|------------|-----------|-----|-------|-------|-----|---------|--------|
| 0001944 | 102147         | KONG UNG | 000000816   | 01/12/12   | 61        | 1   | 1     | 1     | 0   | 1901... | HCSD   |

Why this Status Occurs: If you are using partial authorizations, a sales order will have a status of HCSD when a ‘decline’ response was issued from the cardholder’s bank. An order can be declined for a variety of reasons, including:

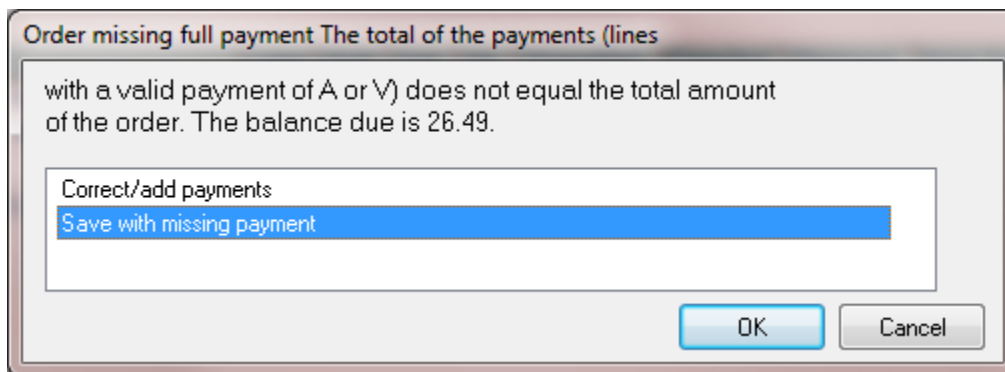
- Insufficient funds
- AVS mismatch
- Issuer Unavailable
- Etc.

How To Resolve: See the [Credit Card Declines & Resolutions](#) section of this document.

## SALES ORDER STATUS: HOFP (HOLD FOR FULL PAYMENT)

| Order # | Internet Order | Name            | Customer ID | Order Date | Days Pend | Qty | Lines | Store | O/C | Retail | Status |
|---------|----------------|-----------------|-------------|------------|-----------|-----|-------|-------|-----|--------|--------|
| 1000471 | 110395         | JESSICA SOBONYA | 000000582   | 03/30/12   | 3         | 6   | 6     | 1     | 0   | 114.84 | HOFP   |

Why this Status Occurs: If you are modifying an order and the order total increases, the Payment Information tab needs to be updated to reflect the new total. If the Payment Information tab is not updated and you save the order, you will see the following message:



If you select “Save with missing payment,” the order will be given a “HOFP” status. It is also possible that a sales tax discrepancy between eRATEX and Order Fulfillment can cause the order to be given a “HOFP” status.

How To Resolve: Update the Payment Details so the amount and the Order Total match, and save the order.

## LINE STATUSES

When sales orders are processed in Order Fulfillment, the items on an order can have a variety of statuses depending on the stage of the order. Below is a list of the most common line statuses, why they occur, and how to resolve them.

### LINE STATUS: RDPK (READY TO PICK)

| Item Link | Description | Qty | N/U/R | System Flag | Retail  | Line status | Shipment | Tax  | Ext Retail |
|-----------|-------------|-----|-------|-------------|---------|-------------|----------|------|------------|
| 1228280   | RATEX PIN   | 1   | N     | GM          | 1891.51 | RDPK        | 001      | 0.00 | 1891.51    |

A line item will have a status of “RDPK” when it is ready for picking. This is the first line status that will occur during the Order Fulfillment process flow.

### LINE STATUS: PICK (PICK)

| Item Link     | Description                                  | Qty | N/U/R | System Flag | Retail | Line status | Shipment | Tax  | Ext Retail |
|---------------|----------------------------------------------|-----|-------|-------------|--------|-------------|----------|------|------------|
| 9780872208957 | ANSELM / BASIC WRITINGS (TRANS WILLIAMS) (P) | 1   | U     | TX          | 11.25  | PICK        | 001      | 0.00 | 11.25      |

A line item will have a status of “PICK” when it is currently being picked. During this step, the item is being removed from the shelf/warehouse location in preparation for verification. Lines with a status of “PICK” can begin the pick verification process.

### LINE STATUS: PCKD (PICKED)

| Item Link | Description           | Qty | N/U/R | System Flag | Retail | Line status | Shipment | Tax  | Ext Retail |
|-----------|-----------------------|-----|-------|-------------|--------|-------------|----------|------|------------|
| 1228119   | CAP, GOWN, TASSEL SET | 2   | N     | GM          | 14.95  | PCKD        | 001      | 0.00 | 29.90      |

A line item will have a status of “PCKD” to indicate that the picking process is complete for the line, and it is ready for verification.

### LINE STATUS: RDSH (READY TO SHIP)

| Item Link | Description           | Qty | N/U/R | System Flag | Retail | Line status | Shipment | Tax  | Ext Retail |
|-----------|-----------------------|-----|-------|-------------|--------|-------------|----------|------|------------|
| 1228119   | CAP, GOWN, TASSEL SET | 2   | N     | GM          | 14.95  | RDSH        | 001      | 0.00 | 29.90      |

A line item will have a status of “RDSH” when the order has been picked and pick verified. Orders that are “RDSH” can be closed. This is the final step of the Order Fulfillment process flow.

## LINE STATUS: CLSD (CLOSED)

| Item Link     | Description                                   | Qty | N/U/R | System Flag | Retail | Line status | Shipment | Tax  | Ext Retail |
|---------------|-----------------------------------------------|-----|-------|-------------|--------|-------------|----------|------|------------|
| 9781111564230 | SIZER / NUTRITIONS: CONCEPTS & CONTROVERSI... | 1   | N     | TX          | 73.49  | CLSD        | 001      | 0.00 | 73.49      |

A line status of “CLSD” indicates that the item has been shipped to the customer. Closed lines cannot be modified.

## LINE STATUS: DRPS (DROP SHIP)

| Key Code | Product       | Description                    | Color | Style | Size | Qty | Shippable? | Expected | Shipment | Price Each | Stat | Line Comment |
|----------|---------------|--------------------------------|-------|-------|------|-----|------------|----------|----------|------------|------|--------------|
| NONE     | 9780077411015 | Communication Works, 11th E... |       |       |      | 1   | 1          | 03/24/14 | 001      | 73.50      | DRPS |              |

As eBook shipments are processed in Order Fulfillment, the eBooks are briefly giving a line status of “DRPS” before automatically closing. If a shipment remains open with a line status of DRPS, this could mean a few things:

- 1) The eBook processing program is not running. [Contact RBS](#) if you believe this is the case on your system.
- 2) The eBook is no longer available for purchase. If a customer orders an eBook that is no longer being offered for sale, the shipment will not automatically process. Double-check the eBook’s availability with the publisher, and if necessary, add a different eBook to the shipment, or cancel the eBook from the shipment.



## APPENDIX E – eRATEX APP CONFIGS

The eRATEX Admin has dozens of parameters called “AppConfigs” that perform various functions. The most common AppConfigs groups are explained here.

### REQUIRED APPCONFIGS

The following AppConfigs are required for use in eRATEX.

#### CYBERSOURCE

*AppConfig Count: 6*

Several AppConfigs in ASPDNSF are used for payment setup & configuration with the CyberSource Business Center. These AppConfigs must be set up with the appropriate information from CyberSource.

|                           |                                                        |
|---------------------------|--------------------------------------------------------|
| CYBERSOURCE.keyFilename   | The .p12 file name, not including the path             |
| CYBERSOURCE.keysDirectory | The path to the .p12 file, not including the file name |
| CYBERSOURCE.merchantID    | Your CyberSource Merchant ID                           |
| CYBERSOURCE.MerchID       | Your CyberSource Merchant ID                           |
| CYBERSOURCE.PublicKey     | Your CyberSource Public Key                            |
| CYBERSOURCE.serialnumber  | Your CyberSource Serial Number                         |

Tip: In eRATEX 3.0, the CyberSource AppConfigs can be defined in the Config Wizard.

#### IMAGES

*AppConfig Count: 12*

Several AppConfigs in the eRATEX Admin are used for image manipulation and sizing. These AppConfigs are prepopulated with default settings and may NOT need to be changed. Review these AppConfigs BEFORE you begin uploading images to your web site to ensure that the images will be sized the way you want.

|                    |                                                                                                                                                                                                              |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DefaultHeight_icon | Default height of an icon image if no width attribute is specified in the other size-configs (i.e. width:50;). This value should NOT be left blank.                                                          |
| DefaultWidth_icon  | Default width of an icon image if no width attribute is specified in the other size-configs (i.e. width:50;). This value should NOT be left blank.                                                           |
| ProductImg_icon    | Sets the specifications for the product icon image. Valid attributes are width(int), height(int), quality(int), stretch(true or false), fill(color string with #), crop(true or false), cropv(top,bottom, or |

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                          | middle), and croph(left,right, or center). All attributes are optional and if not specified will use the values from the default-configs.                                                                                                                                                                                                                                                                            |
| DefaultHeight_medium     | Default height of a medium image if no width attribute is specified in the other size-configs (i.e. width:50;). This value should NOT be left blank.                                                                                                                                                                                                                                                                 |
| DefaultWidth_medium      | Default width of a medium image if no width attribute is specified in the other size-configs (i.e. width:50;). This value should NOT be left blank.                                                                                                                                                                                                                                                                  |
| ProductImg_medium        | Sets the specifications for the product medium image. Valid attributes are width(int), height(int), quality(int), stretch(true or false), fill(color string with #), crop(true or false), cropv(top,bottom, or middle), and croph(left,right, or center). All attributes are optional and if not specified will use the values from the default-configs.                                                             |
| DefaultHeight_large      | Default height of a large image if no width attribute is specified in the other size-configs (i.e. width:50;). This value should NOT be left blank.                                                                                                                                                                                                                                                                  |
| DefaultWidth_large       | Default width of a large image if no width attribute is specified in the other size-configs (i.e. width:50;). This value should NOT be left blank.                                                                                                                                                                                                                                                                   |
| ProductImg_large         | Sets the specifications for the product large image. Valid attributes are width(int), height(int), quality(int), stretch(true or false), fill(color string with #), crop(true or false), cropv(top,bottom, or middle), croph(left,right, or center), largecreates(true or false), and largeoverwrites(true or false). All attributes are optional and if not specified will use the values from the default-configs. |
| LargeCreatesOthers       | Determines whether an uploaded large image will create the icon and medium images. This value can be over written in each of the size-configs through use of the attribute largecreates (i.e. largecreates:false;).                                                                                                                                                                                                  |
| LargeOverwritesOthers    | Determines whether an uploaded large image will create AND overwrite existing icon and medium images. This value can be over written in each of the size-configs through use of the attribute largeoverwrites (i.e. largeoverwrites:false;).                                                                                                                                                                         |
| ResizableLargeImagePopup | Set to true if you want the large image popup window to be resizable by the user                                                                                                                                                                                                                                                                                                                                     |

## MAIL

*AppConfig Count: 14*

Several AppConfigs in ASPDNSF are used for mail configuration. These AppConfigs must be set appropriately for e-mail to be sent.

|                            |                                                                                                                                                                                                        |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| GotOrderEMailFrom          | Got New Order notification e-mails are sent FROM this e-mail account, as the sender.                                                                                                                   |
| GotOrderEMailFromName      | Got New Order notification e-mails are sent FROM this e-mail account Name as the sender. This is optional. This could also match GotOrderEMailFrom_1 value.                                            |
| GotOrderEMailTo            | Who gets notified of new orders. This is typically the e-mail address that the store administrator monitors.                                                                                           |
| MailMe_FromAddress**       | The e-mail address you want order receipts to be sent from, e.g. sales@yourdomain.com                                                                                                                  |
| MailMe_FromName**          | The Name you want order receipts to be sent from, e.g. Sales                                                                                                                                           |
| MailMe_Server              | DNS of your mail server, usually mail.yourdomain.com                                                                                                                                                   |
| MailMe_ToAddress           | The e-mail address you want order notifications to be sent to, usually the same as MailMe_FromAddress, e.g. sales@yourdomain.com                                                                       |
| MailMe_ToName              | The e-mail Name you want order notifications to be sent to, e.g. Sales                                                                                                                                 |
| MailMe_User                | Mail server login userName (optional). Consult your mail server requirements to see if this is required                                                                                                |
| MailMe_UseSSL              | Set this to true if your mail server requires an SSL connection. NOTE: This is very uncommon and has nothing to do with SSL on your site. Only change this if you know what you are doing.             |
| ReceiptEMailFrom           | When customers are sent their order receipt, it comes from this e-mail account.                                                                                                                        |
| ReceiptEMailFromName       | When customers are sent their order receipt, it comes from this e-mail account.                                                                                                                        |
| SendOrderEMailToCustomer   | If true, when a (normal, not recurring) order is created, an order receipt e-mail will be sent to the customer. If false, then no order e-mail is sent                                                 |
| SendShippedEMailToCustomer | If true, when a (normal, not recurring) order is marked in the <b>admin site</b> , a 'your order has shipped' e-mail will be sent to the customer. If false, then no order has shipped e-mail is sent. |

## MISC REQUIRED APPCONFIGS

AppConfig Count: 14

The following AppConfigs are required in the eRATEX Admin. A majority of these AppConfigs have default values and may not require changes.

|                                            |                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Admin_DefaultTaxClassID                    | This is the default tax classification for a product, unless you decide to add additional tax classes and override it.                                                                                                                                                                                                                                                                                   |
| Admin_DefaultSalesPromptID                 | This is the default sales prompt applied to a new Product, unless the user overrides it                                                                                                                                                                                                                                                                                                                  |
| BowkerUsername                             | If using BIP, enter your username here.                                                                                                                                                                                                                                                                                                                                                                  |
| BowkerPassword                             | If using BIP, enter your password here.                                                                                                                                                                                                                                                                                                                                                                  |
| HideVariantsWithLessThanThisInventoryLevel | Variants (SKUs) with less than this inventory level will be hidden from the web site and unable to be purchased.                                                                                                                                                                                                                                                                                         |
| HideProductsWithLessThanThisInventoryLevel | If not zero, the site will filter out products that have less than the inventory # in stock that you specify here. Leave to 0 to disable this filtering. For products with multiple variants, and sizes & colors, etc, the SUM of those inventory items is used to determine if to filter the product. So the sum of all variant inventory must be less than this number before it will be filtered out. |
| LiveServer                                 | The domain of the live site. This is usually just domain.com for your site (use your own domain name).                                                                                                                                                                                                                                                                                                   |
| PaymentGateway**                           | The name of your payment gateway, i.e. CYBERSOURCE                                                                                                                                                                                                                                                                                                                                                       |
| PaymentMethods**                           | Enter the payment methods you want to allow on the store. Valid values are: Credit Card, Purchase Order, eCheck, PayPal, PayPal Express, Request Quote, Check By Mail, and C.O.D. (that is "C.O.D." with the ending period), C.O.D. (Money Order), C.O.D. (Company Check), MICROPAY, C.O.D. (Net 30). You can specify that you want to allow multiple payment methods, just separate them                |

|                       |                                                                                                                                                                                                                                                          |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                       | by a comma, e.g. Credit Card, Purchase Order, PayPal                                                                                                                                                                                                     |
| StoreName**           | The name of your store                                                                                                                                                                                                                                   |
| TransactionMode**     | Specifies how credit cards are handled in real-time by the site, when an order is entered. AUTH means that the card is ONLY authorized. Recommended setting: AUTH                                                                                        |
| UseLiveTransactions** | If true, the merchant gateway is called when processing an order. If false, then the merchant gateway code is bypassed, and an OK status is returned. A false value is good for development/testing. Almost always must be true for a 'live' store site. |
| Use SSL**             | If true, https links will be used for shoppingcart pages, account pages, receipt pages, etc. Recommended setting: FALSE                                                                                                                                  |

\*\*These AppConfigs are set automatically when the Configuration Wizard is run (Misc > Run Config Wizard).

## OPTIONAL APPCONFIGS

*AppConfig Count: 10*

These AppConfigs are optional for use in the eRATEX Admin. Several of these AppConfigs are useful, and you may decide to make them a permanent fixture of eRATEX.

|                                             |                                                                                                                                                                                                                                                         |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ShippingHandlingExtraFee                    | An extra amount will be added to all shipping totals for orders where the shipping total is non-zero. This cost is NOT added to orders where the shipping total is 0.00. This value should be a dollar amount, without leading \$ character, e.g. 5.00. |
| ApplyShippingHandlingExtraFeeToFreeShipping | If set to “true” and ShippingHandlingExtraFee is non-zero, the ShippingHandlingExtraFee will be applied to the shipping cost even when its 0.00. If false, it will not be applied with the shipping cost is 0.00.                                       |

|                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| IsFeaturedCategoryID                                                                                                                                                                                            | The category ID that is considered to be 'Featured Products'. Products mapped to this category get a Featured status. The IsFeatured flag should also be set on the Product. This category ID provides an additional way for consumers to find the 'specials'.                                                                                                                                                                                                                                                                                                                                         |
| Watermark.Enabled<br>Watermark.CopyrightImage.Icon<br>Watermark.CopyrightImage.Medium<br>Watermark.CopyrightImage.Large<br>Watermark.CopyrightText<br>Watermark.OffsetFromBottomPercentage<br>Watermark.Opacity | These AppConfigs control watermark text/ images on all products.<br>If using a text string, fill in Watermark.CopyrightText. If using images, fill in Watermark.CopyrightImage.Icon (and .Medium and .Large). <i>Tip:</i> If an image background is 100% green (0, 255, 0), it will show as transparent on the site.<br>Watermark.Opacity controls the opacity of the watermark image (NOT text string).<br>Watermark. OffsetFromBottomPercentage controls where the watermark is placed on the image; it is offset from the bottom.<br>Watermark.Enabled must be set to true to implement this logic. |

## RATEX APPCONFIGS

AppConfig Count: 17+

Any AppConfig with the prefix “RATEX” is an AppConfig created by RBS for use with eRATEX. The majority of these AppConfigs are OPTIONAL and do not require any modifications.

|                           |                                                                                                                                                                                   |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| RATEX.Booklist            | Several AppConfigs are titled RATEX.Booklist_____. These AppConfigs are used in conjunction with the Booklist Configuration (Booklist > Configure) and do not need to be changed. |
| RATEX.Booklist.HeaderText | If you want specific text, i.e. a header, at the top of the BookList page, enter that text here.                                                                                  |
| RATEX.EBOOK               | Several AppConfigs are titled RATEX.EBOOK_____. These AppConfigs                                                                                                                  |

|                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                           | are used in conjunction with eBook configuration and should not be modified by users.                                                                                                                                                                                                                                                                                                                             |
| RATEX.ForeignCountryExclusions                                                                                                            | Any countries listed in the Value are considered “local” countries, not “foreign” countries, and regular address formatting is used. A “foreign” country will use the FC/00000 address conversion.                                                                                                                                                                                                                |
| RATEX.LogoStyle                                                                                                                           | Changes the way the “Powered by eRATEX™ RATEX Business Solutions” logo is displayed on your site.                                                                                                                                                                                                                                                                                                                 |
| RATEX.MaintainGMProductDataOnWeb<br>RATEX.MaintainTRProductDataOnWeb<br>RATEX.MaintainTXProductDataOnWeb                                  | A comma-separated list of GM/TR/TX product data to be protected from updates from VR. Leave blank to maintain all product data in VR. Available data: summary, description.                                                                                                                                                                                                                                       |
| RATEX.McAfee                                                                                                                              | Displays the McAfee logo. This should not be modified by users.                                                                                                                                                                                                                                                                                                                                                   |
| RATEX.TextbooksCategoryName                                                                                                               | Textbooks will automatically be added to a category with this name when loaded from VR. If you don't provide a value, "Textbooks" will be used. If there is no category with that name, it will be created when a textbook is loaded from VR.                                                                                                                                                                     |
| RATEX.XmlPackage.GMMultiVariant<br>RATEX.XmlPackage.GMSingleVariant<br>RATEX.XmlPackage.TRMultiVariant<br>RATEX.XmlPackage.TXMultiVariant | Default XML package to use for GM multivariants, single variants, trade products or text products. If you have an XML package that you would like to use other than the defaults provided, you can change this AppConfig. Users generally will not need to modify this.                                                                                                                                           |
| RATEX.PartialAuth<br>RATEX.PartialAuthAmount<br>RATEX.PartialAuthMessage                                                                  | <p><b>AppConfigs to implement the “zero” or “partial auth” logic in eRATEX.</b> It is recommended that users implement this logic.</p> <p>ZeroAuth must be set to “true” to implement the logic. ZeroAuthAmount must be set to a value greater than 0.00 (we recommend .01). <b>ONCE YOU ARE LIVE THE AUTH AMOUNT SHOULD NEVER BE CHANGED!</b> ZeroAuthMessage is the message users will see during checkout.</p> |



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