The SuperManager

eCommerce Order Processor

User's Manual

Version 2.0.3.0

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1.0 Introduction

Dear Store Owner,

Thank you for your purchase of The SuperManager. Our intention at **SuperWare, LLC** is to provide you with quality software and tools to improve your business, allowing you to focus your efforts on promoting and expanding your business. We hope you are satisfied with your purchase and that you will find this piece of software useful in your daily store management.

Please feel free to contact us via e-mail at info@thesupermanager.com.

More information can be found on our website at http://www.thesupermanager.com.

Thanks and good luck!

David Johns

Head Developer
SuperWare, LLC

Web based support and help:

The SuperManager Forum	http://www.thesupermanager.com/forum
The SuperManager Website FAQ	http://www.thesupermanager.com/forum/index.php/board,6.0.html

Phone: (909) 248-4860

2.0 Quick Start

This is a quick start method to begin using The SuperManager immediately to download, print and charge orders. You will want to read this manual thoroughly to take full advantage of the many functions offered by The SuperManager.

1. To begin using The SuperManager, install the software by running “SuperManager Setup.exe” and then follow the prompts. This installer file can be downloaded using the link that will be sent to you when you purchase SuperManager or request a trial.

2. Open SuperManager using the shortcut the installer places on your desktop and when prompted enter the license information provided via email after you purchased or started a trial of SuperManager.

3. Next, open the "Store Settings" dialog by selecting "View", then "Store Settings…" from the menu. Press “Add” to create a new store and then input all your store information and critical login information. For more information about which login information is required for a particular store type, see section 6.1. Once you have entered your login information, press “Ok” to save and close the store settings.

4. Next, download orders by clicking "View", then "Orders" from the main menu. Once you are in the Orders Screen, press the “Get New Orders” button. The first time you download orders, depending on the type of store you are connecting to, SuperManager will ask you for a range of orders to download. Choose a logical starting point for the orders you wish to track in The SuperManager. You may want to start with orders from the current year, month, etc… To do this, log into the online store manager for your store and browse through your orders to find the order number of the first order you would like to download into SuperManager, then enter this order number in the “From” box and the word “last” in the “To” box and click “Ok”.

5. The first time you download orders you will be prompted to download your products. Generally it is a good idea to choose to do this, but it is not necessary. SuperManager will add products to your product list as orders containing them are downloaded, however, it will only compile a complete list of possible product options if the product list is downloaded.

6. To print orders, select the order(s) in the order list and then press the right mouse button and choose "Print Invoice" or press ctrl-P. Several report templates are installed with SuperManager. These can be customized using an html editor. If you are uncomfortable with using an HTML editor or would prefer to not spend the time doing so, SuperWare support will customize templates to suit your needs for a reasonable fee.

7. To charge orders, select the order(s) in the Order List and then right click and select "Charge" from the drop down menu. If you are using SuperManager with a Yahoo! Store, the orders will be charged through your Yahoo! Merchant service. Otherwise, you will need to enter your account information for Authorize.net and/or Direct Connect and/or USA ePay. That will be discussed later on.

3.0 Tips and Tricks

Here is a short list of tips and tricks that will help you make the most of The SuperManager.

1. Click the "Open Store Manager" button to automatically log on to your online store manager. This step is not required before using other functions requiring SuperManager to login to your store. It is just provided as a convenience to you in performing other tasks in your shopping cart’s backend.

2. Download your products before you get new orders for the first time and keep your product database up to date by downloading products on a regular basis (See section 9.0).

3. Use The SuperManager to process all of your credit card transactions. This will ensure that your accounting export information is correct (See section 10.2).

4. Send PayPal payment requests and reminders with the send email template function (See section 7.0).

5. Use the send email template to send marketing emails to your customers.

6. Use the pre-defined keyboard shortcuts to speed up your processing

Key Sequence	Action
Ctrl-A	Select all orders in the current list
Alt-B	Submit batches
Alt-C	Charge selected orders
Ctrl-C	Copy the order list to the clipboard for pasting into another application
Ctrl-Shift-C	When on the product details screen copies a hyperlink to the displayed order to the clipboard
Alt-D	XML exchange with DAZzle
Alt-E	Export the default text export format
Ctrl-Shift-E	Show the browser that SuperManager uses for interfacing with some online stores
Alt-F	XML exchange with FedEx Web Services
Alt-I	Import the default text import format
Ctrl-N	New SuperManager data (.smg) file
Ctrl-S	Save SuperManager data (.smg) file
Alt-O	Get new orders
Ctrl-O	Open SuperManager data (.smg) file
Alt-P	Download new PayPal Payments
Ctrl-P	Print default invoice for the selected orders
Alt-Q	XML exchange with QuickBooks
Ctrl-T	Insert a timestamp in the order notes on the order details page
Alt-V	XML exchange with VIP Parcel
Alt-W	XML exchange with UPS WorldShip

4.0 Requirements and Installation

4.1. Requirements

4.1.a Minimum

Internet Explorer:	9.0
Processor:	1 GHz or greater
Operating System:	Vista, 7, 8 and 10
Memory:	512 MB RAM

4.1.b Recommended

Internet Explorer:	11.0 or higher
Processor:	1 GHz or greater
Operating System:	Windows 7.1 or higher
Memory:	1 GB RAM

4.2. Installation

Follow these steps to install your copy of The SuperManager.

1. Have your license user name and license key on hand to enter in The SuperManager after installation. You should have received this via email.

2. Download the installer file from the location described in the registration email that was sent to you. Save the file to your local hard drive or open it directly after downloading.

3. Run SuperManager Setup.exe file and follow the installation instructions.

4. When prompted, enter your license name and license key exactly as you have received it.

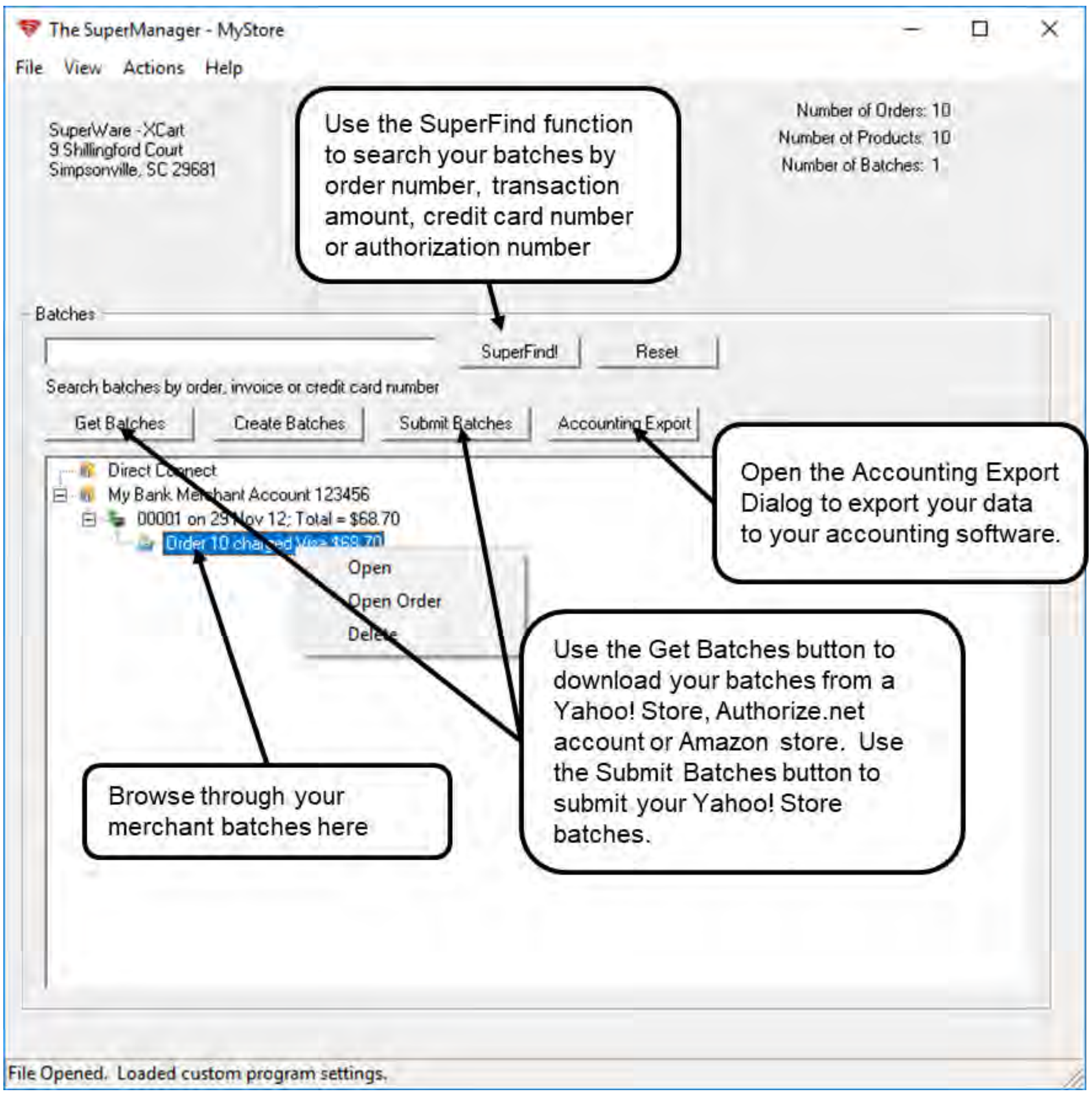
5. Congratulations, you are now ready to begin using The SuperManager!

5.0 The SuperManager Dialog Windows

The SuperManager is organized into several dialog windows for viewing and managing the information of your store.

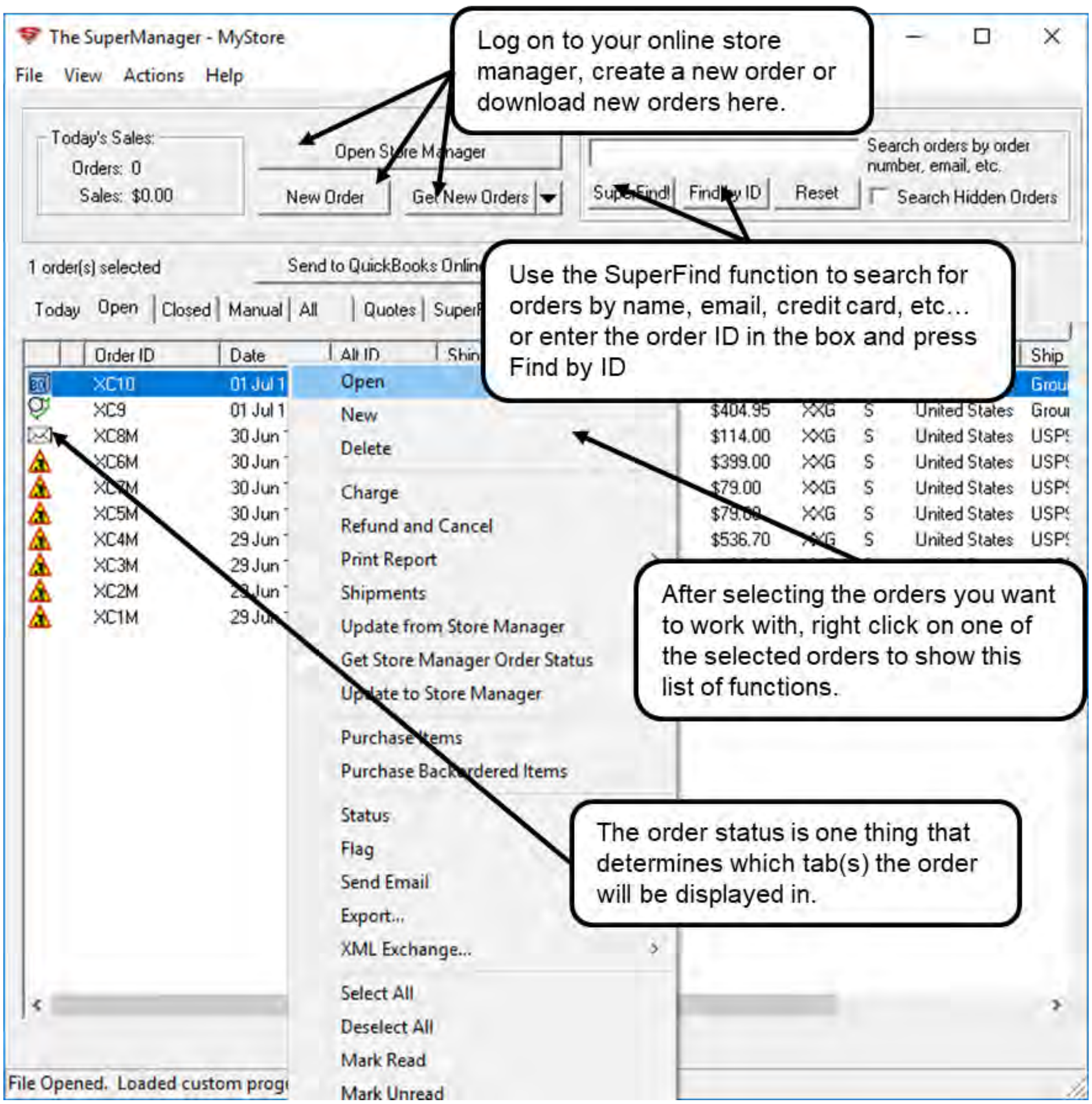
5.1. Admin Dialog Window

Get to this screen by choosing “View”, “Admin” from the main menu. Manage your merchant batches from the Admin Dialog Window. The main features are described below.



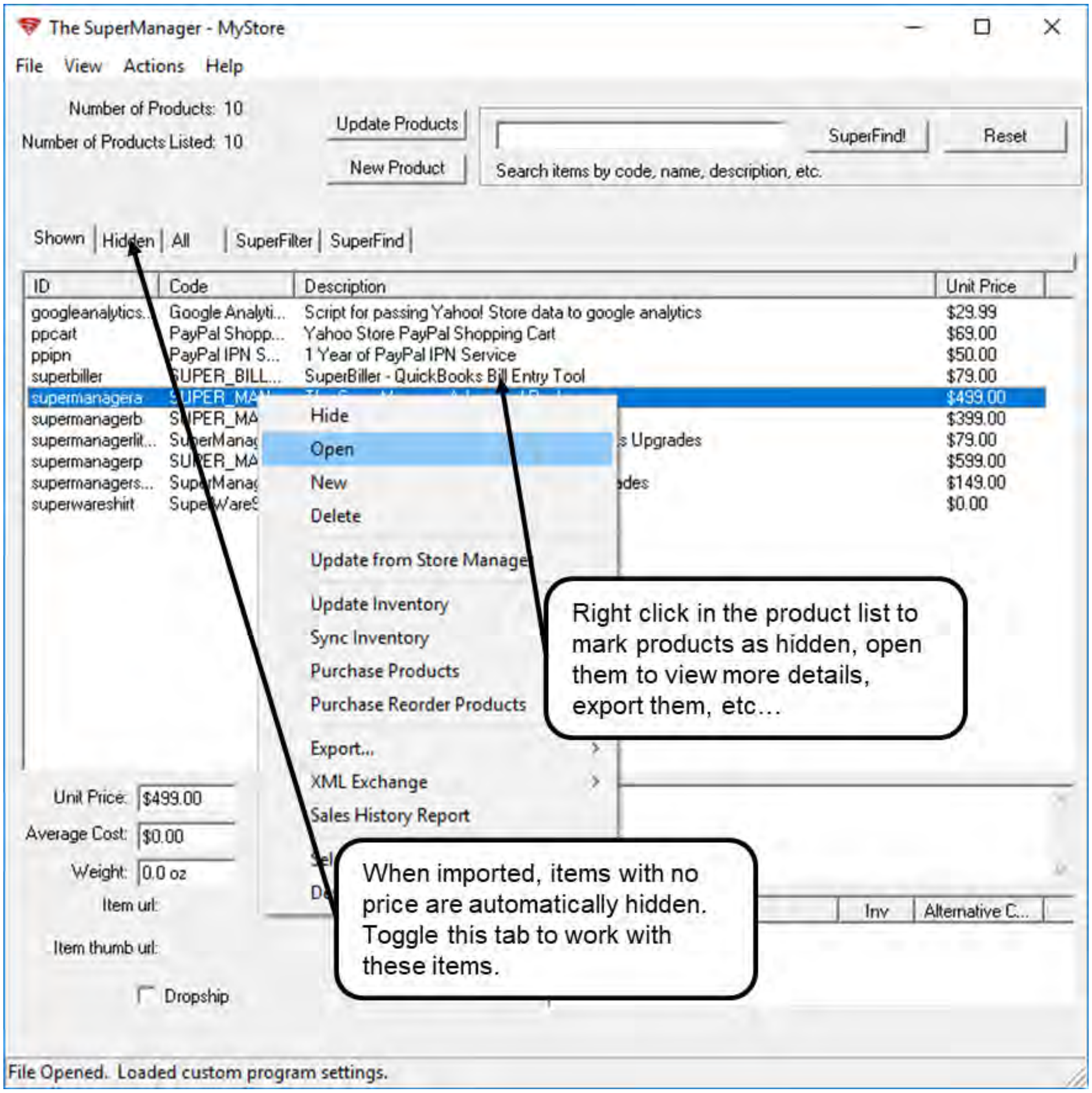
5.2. Orders Dialog Window

Get to this screen by choosing “View”, “Orders” from the main menu. Manage your orders in batches from the Orders Dialog Window. You can print invoices, charge credit cards, export to shipping software, enter weights or shipping tracking numbers, send emails based on pre-defined templates and many other tasks.



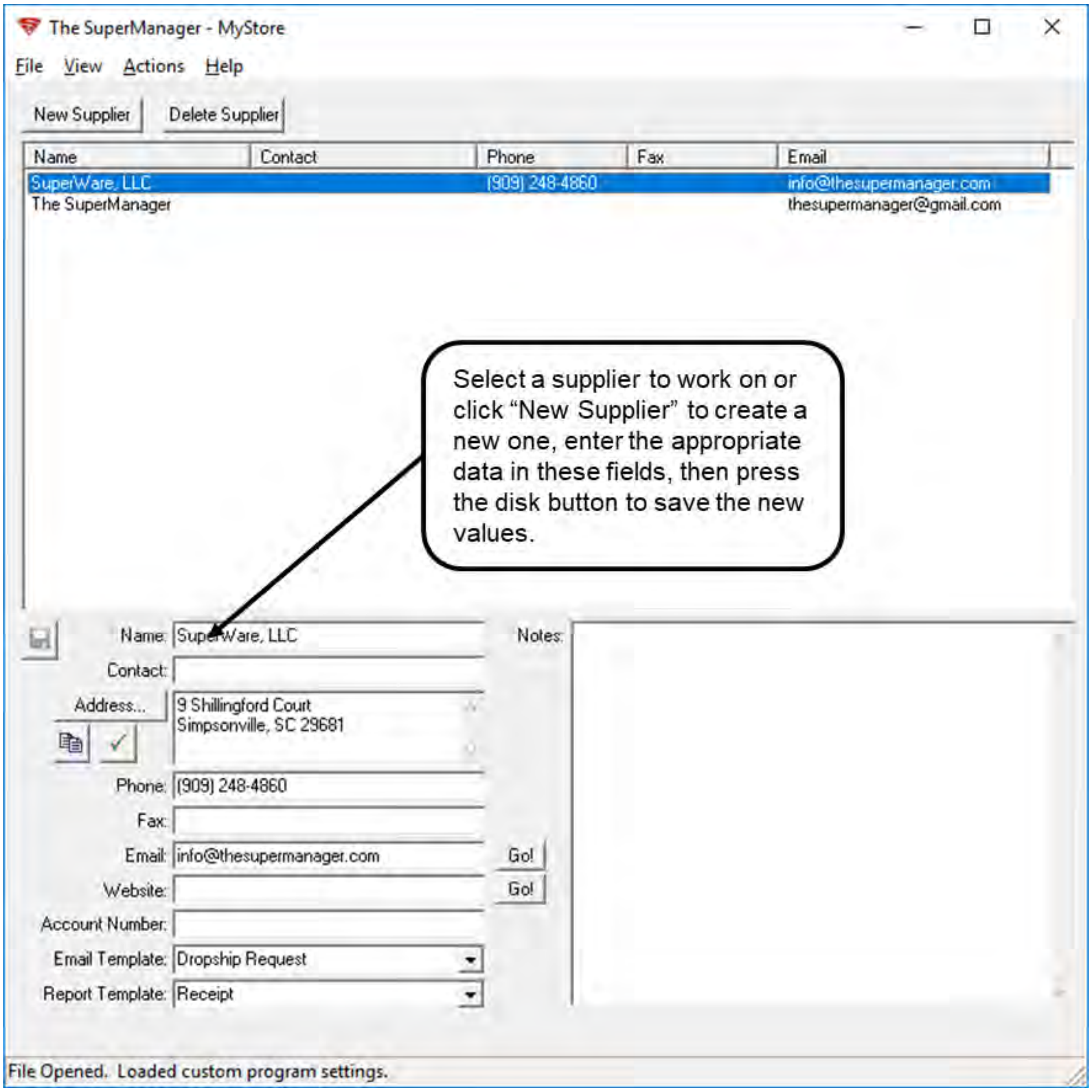
5.3. Products Dialog Window

Get to this screen by choosing “View”, “Products” from the main menu. View and work with your product list in the products dialog window.



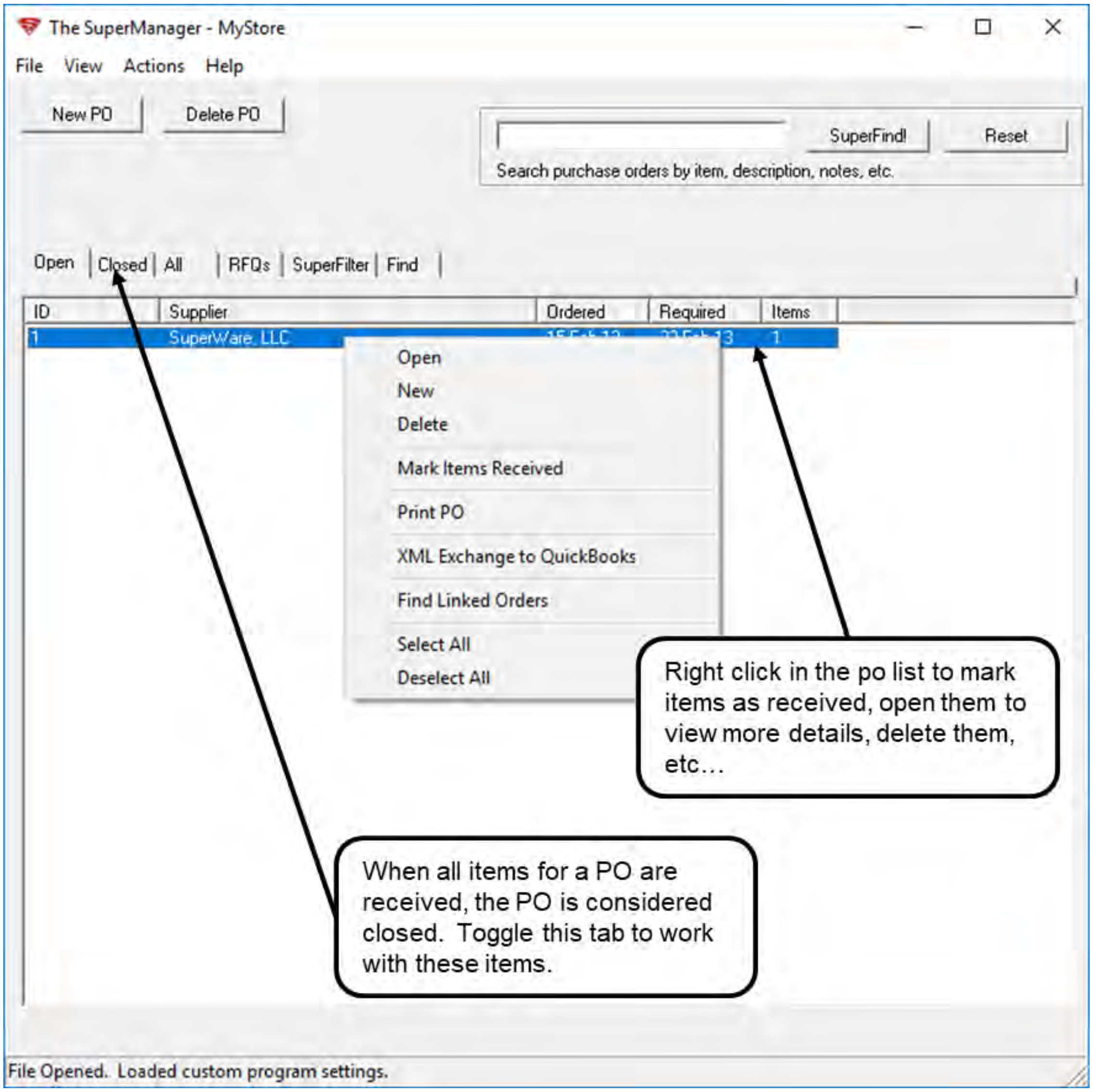
5.4. Suppliers Dialog Window

Get to this screen by choosing “View”, “Products” from the main menu. View and work with your product list in the products dialog window.



5.5. Purchase Orders Dialog Window

Get to this screen by choosing “View”, “Products” from the main menu. View and work with your product list in the products dialog window.



5.6. Store Settings Dialog Window

Get to this screen by choosing “View”, “Store Settings…” from the main menu. This set of property pages allows you to input and edit preferences and settings specific each store database, such as your store’s passwords and usernames, email templates, shipping and payment methods and so forth. Each of the tabs in the store settings will be shown in section 6.0.

5.7. Program Settings Dialog Window

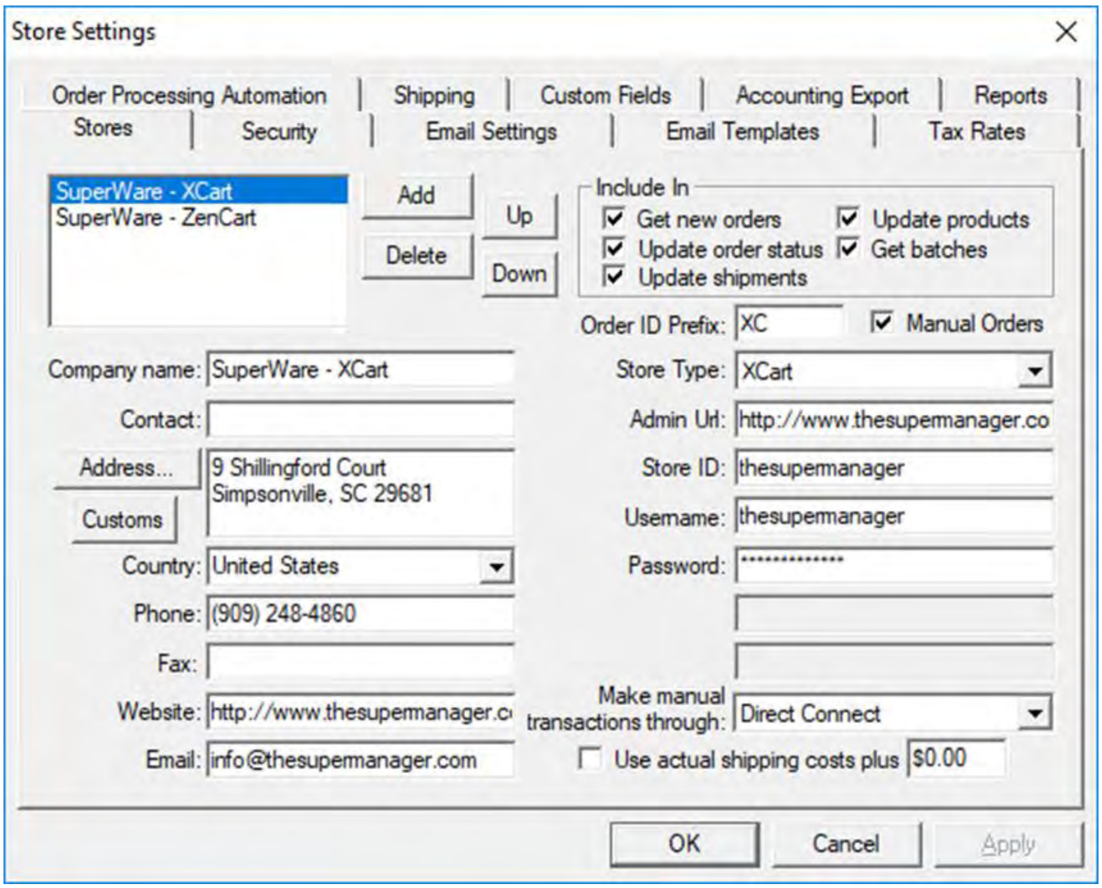
Get to this screen by choosing “View”, “Program Settings…” from the main menu. This set of property pages allows you to change settings that remain constant among all the store databases you may use in The SuperManager. It includes automatic download of orders, specification of which fields to save and import and export formats. Each of the tabs in the store settings will be shown in section 7.0.

6.0 Store Settings / Setup

To begin setting up your store, click "File", then "New" in the Admin Dialog Window. Take your time to familiarize yourself with all the different Store Settings to ensure that you will be able to use The SuperManager to its fullest potential. After you have completed filling in the information, click "OK". Next, be sure to save your changes to your SuperManager data (.smg) file by clicking "File", then "Save As" and chose a name for your SuperManager data (.smg) file. This file will contain your Store Settings, Product Information and your Order information. It can be shared over a network or it can be saved, copied or sent to a colleague to work with. The Store Settings dialog can also be accessed at any time by clicking "View", then "Store Settings" from the Admin Dialog Window.

6.1. Store / Company Profile

Enter your store profile/company information here. This information can be added to standard emails or to invoices by utilizing The SuperManager variable list (See section 12.1, The SuperManager Variable List).



Company Name and Contact Information This information is primarily necessary for filling in company information in email templates and reports.

Include In Check these options to include this store when doing “Get new orders”, “Update products” and “Get batches” requests.

Order ID Prefix This is a non-required prefix to prepend to all order IDs from this store. This is primarily provided to be able to distinguish orders from one store from other stores on reports, emails and on the order list.

Store Type	Choose the type of store that SuperManager should connect to and enter the credentials for that store. Since the credentials vary a little bit among store types, they are described below

6.1.a 3dCart

SuperManager integrates with 3dCart via their REST API module. Before SuperManager will be able to connect you will need to set up the REST API Module. To do this:

1. Log in to your 3dCart admin
2. From the menu on the left, choose “Modules”
3. In the “Search Modules” box, type “REST API”
4. If that module is not installed, install it. If it is, press the “Change Settings” link
5. Click the “Add” button to add a new REST API user account
6. In the “Public Key” box that comes up, enter “220eefe6e69d17bd74287a5ce76cf110” and click the “Add” button
7. Click the “Authorize” button
8. Enter the credentials in your SuperManager store settings as follows:

API Url	The root Url to your 3dCart store, ex: my-store.3dcartstores.com
API Token	Leave blank. SuperManager will get this for you the first time it downloads orders from your store

6.1.b Amazon

SuperManager can integrate with Amazon or Amazon FBA stores using the Merchant Web Services API. Before SuperManager can connect to your store you will need to enable API access to SuperManager. This is done by going to the website shown in the table below under “Link to Enable API” and following these steps:

1. Click on the link “Sign up or manage Amazon MWS”
2. Sign in using the same login and password as you use to access your seller central
3. Click on the button “Register as a Developer”
4. Accept the license agreement and press “Next”
5. Print or save the credentials and enter them below as described:

MWS Endpoint	Amazon stores for the US based Amazon can leave this blank. The following endpoints are also supported:

Market	MWS Endpoint	Link to Enable API
USA	(leave blank)	https://developer.amazonservices.com
Canada	mws.amazonservices.ca	http://developer.amazonservices.ca
China	mws.amazonservices.com.cn	http://developer.amazonservices.com.cn
France	mws.amazonservices.fr	http://developer.amazonservices.fr
Germany	mws-eu.amazonservices.com	http://developer.amazonservices.de
India	mws.amazonservices.in	http://developer.amazonservices.in
Italy	mws-eu.amazonservices.com	http://developer.amazonservices.it
Japan	mws.amazonservices.jp	http://developer.amazonservices.jp
Mexico	mws.amazonservices.com.mx	http://developer.amazonservices.com.mx
Spain	mws-eu.amazonservices.com	http://developer.amazonservices.es
UK	mws.amazonservices.co.uk	http://developer.amazonservices.co.uk

Developer Key The value next to "AWS Access Key ID" obtained as described above

Developer Secret The value next to "Secret Key" obtained as described above

Merchant ID The value next to "Seller ID" obtained as described above

Marketplace The value next to "Marketplace ID" obtained as described above

Fulfilled By Set to "Merchant" to import only orders fulfilled by you, "Amazon" to import only orders fulfilled by Amazon (FBA) or "Both" to import all orders.

6.1.c Americart

For integrating with Americart, it is necessary for your cart to be using the Order Manager Templates. If your cart is not using these templates or you are not sure, contact Americart support to make sure it is

Username Your Americart username

Password Your Americart password

6.1.d Big Commerce

For integrating with Big Commerce, it is necessary to create an API account in the BigCommerce dashboard. Follow these steps to do this:

1. From the dashboard, choose “Advanced Settings” > “API Accounts”
2. Click the “Create API Account” button
3. Enter “SuperManager” for the name
4. Copy the “API Path” displayed on this page and paste it into your Admin URL in the SuperManager store settings
5. In the path you just copied, change “v3” at the end of the path to “v2”
6. Go back to BigCommerce and set the “Oauth Scopes” to “Modify” for each of the api resources listed and “Customers Login” to “login” and then click the “Save” button at the bottom of the page
7. This will bring up a window containing a Client ID, Client Secret and Access Token. Copy the client ID and Access Token to the remaining fields in your SuperManager store settings.

Admin URL	The url to the Big Commerce API for your store. See above for instructions on how to obtain this.
API Client ID	The client ID obtained from the steps above
API Access Token	The API token obtained from the steps above

6.1.e Claim The Web

For integrating with Claim The Web some special scripts have to be installed on your server. These scripts can be downloaded from the following link:

http://www.thesupermanager.com/download/shopping_cart_scripts/ClaimTheWeb.zip

Admin Url	The url to the admin section of your Claim The Web store
Store ID	A user-chosen store ID that is contained in plugin.superware_order_manager.php in the above package of scripts. It defaults to “MyStore”, but you will need to change it if you are using SuperManager with more than one ClaimTheWeb store and can change it to customize it even if you are only using it for one store. To do so, just find “MyStore” in the script and change it to the value of your choosing and make sure it matches between SuperManager and the script.
Username and Password	A different username is setup for integrating with the scripts than with your ClaimTheWeb back end. You will have to set up this username and password with ClaimTheWeb support

6.1.f GrabCart

Username	Your GrabCart username
Password	Your GrabCart password

6.1.g Magento 1.x

For integrating with a Magento 1.7 or later installation using its REST API. Before SuperManager can connect to your store you will need to enable API access to SuperManager. This is done through the following steps:

1. Login to the admin panel for your store
2. Add a REST Admin Role:
    a. From the dropdown menus at the top, choose “System”, “Web Services”, “REST – Roles”
    b. If you do not have an Admin role, click “Add Admin Role”
    c. Assign a name to the admin role. You could use “Admin”, “SuperManager” or any name you like and click “Save Role”
    d. Choose “Role API Resources” under the “Role Information” tabs on the right
    e. For the “Resource Access” dropdown, choose “All” and click “Save Role”
3. Assign your username to this new REST Role:
    a. From the dropdown menus at the top, choose “System”, “Permissions”, “Users”
    b. Click on the user that should be used by the API calls
    c. Under the “User Information” tab, choose “REST Role”
    d. Click the radio button next to the name of the role created in above and click “Save User”
4. Assign the required REST Attributes:
    a. From the dropdown menus at the top, choose “System”, “Web Services”, “REST – Attributes”
    b. Click on the REST Role created above
    c. From the “Resource Access” dropdown, choose “All” and click “Save”
5. Create an oAuth Consumer:
    a. From the dropdown menus at the top, choose “System”, “Web Services”, “REST - OAuth Consumers”
    b. Click “Add New”
    c. For “Name” enter “SuperManager and click “Save and Continue Edit”
6. Copy the Key and Secret fields and go back into SuperManager and paste them into the store settings and press “OK” to save and close the store settings
7. Run “Get New Orders” for the first time

a. Go to the orders screen if you are not already, by choosing “View”, “Orders” from the main menu

b. Press the “Get New Orders” button

c. A popup box will come up asking you which orders to download. It is recommended to download a single order or a small range of orders. Enter order numbers based on the Magento order_id, not what it refers to as the “Order #” or the “increment_id”. This number can be found by going to “Sales”, “Orders” in Magento admin, finding the first order you intend to download into SuperManager and clicking on it to open the “Order View” screen. Once on that page, look at the url in your browser, which will look something like http://www.myshop.com/index.php/admin/sales_order/view/order_id/7/key/01330101d520674cb71b90ed0f21edcb/. The order id is show next to “order_id” in this url. So in this example, the order id is 7. Enter that number in the “Get Orders…” popup in SuperManager as the “First” order and the “Last” order and click “OK”

d. SuperManager will popup a browser window for your to log into your store. This is part of the authentication process. You will need to log in and then click the “Authorize” button when asked whether to allow SuperManager to access your store.

e. After clicking the authorize button, a verification code will be given to you. Copy and paste this code into a popup box in SuperManager that should be waiting to receive this code.

8. After authorizing SuperManager to download your orders the first time and downloading your first order, you can just click the “Get New Orders” button to download your Magento orders.

9. If you get an error message like “Error downloading orders: Item(Mage_Sales_Model_Order) with the same id ‘1’ already exists” it will be necessary to edit the file “lib/Varien/Data/Collection.php”. Comment line 373 out, which is the line that throws this error message.

The following store settings are involved in the steps above:

Installation URL	The URL for the base of your Magento store
Store Name	If you want only orders from a particular store defined in your Magento installation, enter the exact name of that store here. Leave it blank if you want orders from all stores to be downloaded.
Key	The consumer key created in the above steps
Secret	The consumer secret created in the above steps
Token	Leave blank. SuperManager will obtain this from your Magento store the first time you attempt to download orders from it.
Token Secret	Leave blank. SuperManager will obtain this from your Magento store the first time you attempt to download orders from it.

6.1.h Magento 2.x

For integrating with a Magento 2.0 or later installation using its REST API. Before SuperManager can connect to your store you will need to enable API access to SuperManager. This is done through the following steps:

1. Login to the admin panel for your store
2. From the menu on the left, choose “Content” and then “Integrations”
3. Click “Add New Integration”
4. Enter “SuperManager” as the name
5. Click the “API” link on the left and select “All” for “Resource Access”
6. Click “Save”
7. Click “Allow”
8. Copy the Key and Secret fields and go back into SuperManager and paste them into the store settings and press “OK” to save and close the store settings
9. Run “Get New Orders” for the first time
    a. Go to the orders screen if you are not already, by choosing “View”, “Orders” from the main menu
    b. Press the “Get New Orders” button
    c. A popup box will come up asking you which orders to download. It is recommended to download a single order or a small range of orders. Enter order numbers based on the Magento order_id, not what it refers to as the “Order #” or the “increment_id”. This number can be found by going to “Sales”, “Orders” in Magento admin, finding the first order you intend to download into SuperManager and clicking on it to open the “Order View” screen. Once on that page, look at the url in your browser, which will look something like http://www.myshop.com/index.php/admin/sales_order/view/order_id/7/key/01330101d520674cb71b90ed0f21edcb/. The order id is show next to “order_id” in this url. So in this example, the order id is 7. Enter that number in the “Get Orders…” popup in SuperManager as the “First” order and the “Last” order and click “OK”
    d. SuperManager will popup a browser window for your to log into your store. This is part of the authentication process. You will need to log in and then click the “Authorize” button when asked whether to allow SuperManager to access your store.
    e. After clicking the authorize button, a verification code will be given to you. Copy and paste this code into a popup box in SuperManager that should be waiting to receive this code.
10. After authorizing SuperManager to download your orders the first time and downloading your first order, you can just click the “Get New Orders” button to download your Magento orders.

The following store settings are involved in the steps above:

Installation URL The URL for the base of your Magento store

Store Name If you want only orders from a particular store defined in your Magento installation, enter the exact name of that store here. Leave it blank if you want orders from all stores to be downloaded.

Key The consumer key created in the above steps

Secret The consumer secret created in the above steps

Token Leave blank. SuperManager will obtain this from your Magento store the first time you attempt to download orders from it.

Token Secret Leave blank. SuperManager will obtain this from your Magento store the first time you attempt to download orders from it.

6.1.i OpenCart

SuperManager integrates with OpenCart through the “Restful API” module. You can download it and install it to your OpenCart installation here:
https://www.opencart.com/index.php?route=marketplace/extension/info&extension_id=15445

After installing the module, you need to set up the key in the module settings and then enter the following credentials in SuperManager:

Admin URL The location of your OpenCart installation

API Token The API token set in the Module settings

Category Optionally enter a category for the orders to import. If left blank, all orders will be downloaded

6.1.j osCommerce

If you would like to interface SuperManager with osCommerce, please contact SuperManager support for help in setting up the integration

6.1.k Other

Use this store type if your store is of a different type than those that are supported and you want to import orders manually via a text file.

6.1.l PrestaShop

For integrating with PrestaShop some special scripts have to be installed on your server at the root of your PrestaShop installation. These scripts can be downloaded from the following link:

http://www.thesupermanager.com/download/shopping_cart_scripts/PrestaShop.zip

Admin URL The location where the PrestaShop and the scripts above are installed

Store ID A name you assign to your store to distinguish orders through it from orders through other stores. This value is entered in the script “supermanager_order_query.php” downloaded from above as well as here in your store settings.

Password The password assigned to your store, which must be entered in the scripts “supermanager_order_query.php” and “supermanager_status_update.php” downloaded from above

6.1.m QuickBooks

This store type allows you to pull invoices or sales receipts from QuickBooks as new orders in SuperManager. This is not to be confused with the ability SuperManager has to **export** orders to SuperManager. This is for if you want SuperManager to treat a QuickBooks file as a store and **import** orders already in QuickBooks into SuperManager.

QuickBooks File Enter the full path and filename of your QuickBooks file (a .QBW file). Leave blank to have SuperManager pull orders from whatever file is open in QuickBooks at the time when you issue the “Get Orders” command.

Class Filter Enter the name of a QuickBooks class to only import orders from a certain class. Leave blank to import orders of all (or no) classes.

Store Type Business to Business: The first line of the address field is the company name and the second line is a contact name followed by the street address

Business to Consumer: The first line of the address field is the name of the customer followed by the street address

Import from Choose whether to import sales receipts or invoices

6.1.n SendOwl

To connect with your SendOwl store you’ll first need to enable the API for your account. To do this, log into your SendOwl account and navigate to the Settings section. Click the API link in the Advanced section and follow onscreen instructions to enable the API. Once enabled the API key and secret will be shown. Enter this in the following fields:

Key Key shown as discussed above

Secret Secret shown as discussed above

6.1.o Ship Station

Connecting SuperManager to your Ship Station account allows it to download orders from any of the channels you have feeding into it.

API Key Obtain this from the API Keys section of your Ship Station setup

API Secret Obtain this from the API Keys section of your Ship Station setup

Store ID This field can be left blank if you want SuperManager to download orders from all your Ship Station sales channels. However, if you want it to get only the orders from one sales channel, you can obtain this by looking at your list of stores.

6.1.p Shopify

Store ID The name of your store, which appears in the home url of your store. For example, if the url of your store was http://some-shop.myshopify.com, then your store ID would be some-shop.

Token Leave blank. After filling in the store ID save and close the store settings and click “Get New Orders”. This will take you through the process of connecting to your store. It will bring up a Shopify login in your web browser. Login using your store username and password. It will get ask you to grant access to the SuperManager App to access your store data. When you click the approve button you will be redirected to The SuperManager website and a verification code will be displayed. Copy this code and paste it into a popup window that will come up in SuperManager and click ‘OK’. After doing this, SuperManager will automatically populate this password and store it in the store settings. Should you need to re-grant access again for some reason, you can clear this value and SuperManager will run through this process again.

6.1.q ShopSite

Base URL The home url of your website. This is used for creating the url for your products when you download them.

Admin URL The url to your ShopSite installation

Username Your ShopSite username

Password Your ShopSite password

6.1.r SparkPay

To use download your SparkPay orders you will need to enable the API. To do this, log into the admin console. Browse to “Tools”, “Apps & Addons”, “API Apps & Integrations” in the admin console. Click the New button and create a new application for SuperManager. When finished, press the “Save”. You will see the App ID and App Secret displayed on the screen that must be entered in the SuperManager store settings.

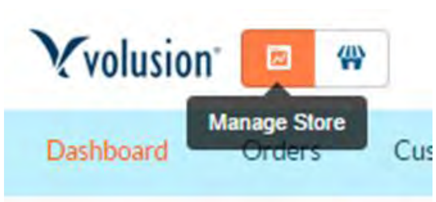
API Url https://[mystorename.com]/api/v1/, where [mystorename.com] is the domain name of your Spark Pay Online Store store

API Token The secret shown on the admin console when the API application was created

6.1.s Volusion

To download your Volusion orders you need to first set up the API. This is done as follows:

1. Login to your Volusion store and click on the “Manage Store” icon to get to the back end



2. Choose “Inventory”, “Import / Export” from the menu bar

3. Choose “Volusion API” from the tabs

4. You may need to click on a link under the “Generic\Orders” to expose the “Run” button next to it

5. Click on “Run” next to the “Generic\Orders”

6. Check the box under “Select Columns” for the “*” so that all order entities will be exported

7. Click the “Run” button at the top of the page

API URL This url is obtained from your Volusion store using the steps above. Copy the Url provided next to “or use this URL:” and paste it into this field up until the “?”.

Username The username used to log into your Volusion store

Encrypted This is embedded in the Url retrieved above. Look for the “EncryptedPassword=” parameter in this url and copy the value provided for that up until the next “&”

6.1.t WooCommerce

To use SuperManager with your WooCommerce store you need to enable the API. To do this:

1. Go to the WooCommerce back end and click on “WooCommerce”, “Settings” and making sure “Enable API” is checked

2. Go to “WooCommerce”, “Settings”, “Advanced”, “REST API”

3. Click the “Add Key” button. In the next screen, add a description, such as “SuperManager” and select the WordPress user you would like to generate the key for

4. Choose “Read/Write” access for the REST API key, then click the “Generate API Key” button

Endpoint This should generally be http://<mywebsite>.com/wp-json/wc/v2, where you substitute <mywebsite>.com with your installation of WooCommerce

Key After following the steps above, look under “WooCommerce API Keys” and put the “Consumer Key” from there in this field.

Secret Copy the “Consumer Secret” found under the Key as described above.

6.1.u XCart

For integrating with XCart some special scripts have to be installed on your server admin folder of your XCart installation. These scripts can be downloaded from the following link:

http://www.thesupermanager.com/download/shopping_cart_scripts/XCart.zip

Admin URL The location of your XCart admin folder, where the scripts above are installed

Store ID The name of your store as assigned in your XCart admin settings

Username The username used to log into your XCart admin

Password The password used to log into your XCart admin

6.1.v Yahoo!/Aabaco Store

Store ID Your Yahoo! Store/Luminate ID. If you do not know this store ID you can find it by going to your store and clicking “View Cart” and then looking at the url that takes you to, which should look like http://order.store.yahoo.net/cgi-bin/wg-order?store_id, where your store ID will be where “store_id” is shown. Often times this will be of the yhst-xxxxxxxxxxxxxx

Username The username you use to sign into your Yahoo! Store/Luminate manager

Password The password you use to sign into your Yahoo! Store/Luminate manager

Key After recent changes to Yahoo! Store/Luminate, the key is no longer required for logging in, however, at this time, SuperManager uses this field as a differentiator between whether to connect to the Luminate API URLs or Yahoo! Store. Until the transition, this value must not be empty. After the transition to Luminate, this value must be left blank.

Tracking Password A different password that is required when sending email order status updates. This can be found in your Yahoo! Store/Luminate manager by following these steps:

1. Open The SuperManager and click on "Open Store Manager" or log in to your Yahoo! Store/Luminate manager yourself.

2. In the online store manager click on the link "Shipment Status"

3. Click on the button "Show Email Tracking Password"

Copy the password from the browser and paste it in this box.

RTI Password SuperWare hosts a Yahoo! Store/Luminate real-time inventory interface that supports synchronizes with your inventory levels in SuperManager. If you use this service, enter the password for that service in this field. For more information, see http://www.thesupermanager.com/yahoo-real-time-inventory.php.

6.1.w Yahoo!/Aabaco Store API or Yahoo!/Aabaco Store API

For integrating with Yahoo!/Aabaco Store using the new API. This approach is faster and generally more robust. The “Yahoo!/Aabaco Store Beta” store type was created to test functionalities of updating your product list through the API functions rather than from the search engine XML files as in the conventional approach. Either of these store types requires you to enable access to the API. To enable to access to the API go to your Yahoo! Store/Luminate manager and follow these steps:

1. Click the “Real-Time Links” link, located in the Order Settings column.
2. Click the “API Settings” link.
3. In the API Settings section, click the “Add New Partner” button.
4. Enter the “ypa-005316243904” as the Partner ID, select the Orders and Payments APIs, then click “Next“.
5. Accept the Terms of Service.

Once the partner ID has been added, a partner access token will be generated and sent via email to the store owner. Note that if you don’t receive the email, you may need to contact Yahoo Store to find out what email address they have on file for you.

Store ID, Username, Password, Key, RTI Password See instructions for Yahoo! Store/Luminate above

API Token The Yahoo! Store/Luminate API token – see documentation above for instructions on how to obtain this

6.1.x ZenCart

For integrating with ZenCart some special scripts have to be installed on your server. These scripts can be downloaded from the following link:

http://www.thesupermanager.com/download/shopping_cart_scripts/ZenCart.zip

Admin URL The url to the admin folder of your ZenCart installation

Store ID A user-chosen store ID that is contained in supermanager_order_query.php and supermanager_product_query.php in the above package of scripts. It defaults to “MyStore”, but you will need to change it if you are using SuperManager with more than one ZenCart store and can change it to customize it even if you are only using it for one store. To do so, just find “MyStore” in the scripts and change it to the value of your choosing and make sure it matches between SuperManager and the script.

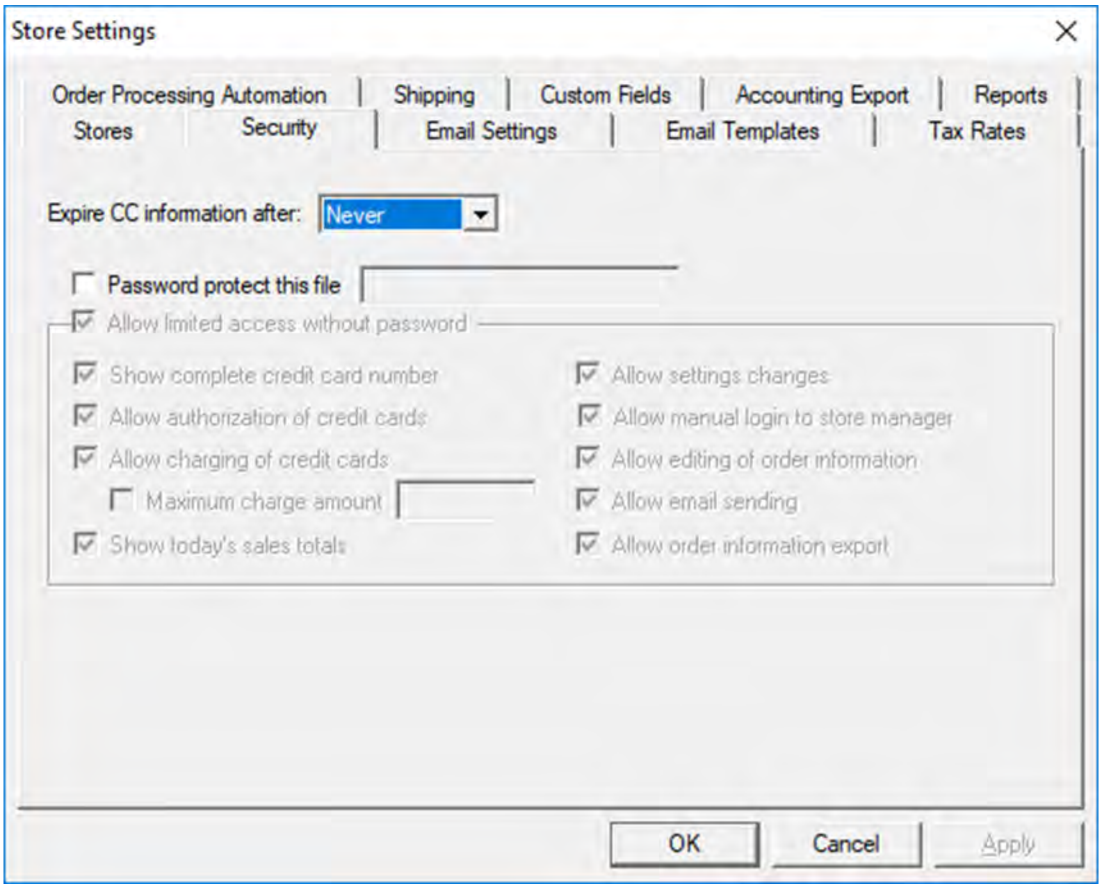
Username Your ZenCart username

Password Your ZenCart password

Make Manual Transactions Through This is the account that you want to use for charging credit cards. Currently, only Authorize.net, Direct Connect, PayPal, USA ePay and Yahoo! Store accounts are supported. Before your Yahoo! Store accounts will be shown in this list, you will have to use either the “Get Batches” or “Submit Batches” functions. For your Authorize.net, Direct Connect, PayPal or USA ePay account to be shown here, it must be manually added to your list of accounts. This will be discussed in section 10.0.

Use Actual Shipping Costs Check this option if you would like SuperManager to automatically add a shipping total to an order when you ship the order. You can make the amount of this total either the exact amount it costs you to ship the package(s) to your customer or add an additional amount on top of the actual costs by entering it in the box next to the checkmark.

6.2. Login / Security Information



Expire CC information after This feature instructs SuperManager to change credit card numbers to “EXPIRED” after the given number of days.

Important Note: Once this option has been selected and the file is saved, the credit card numbers are no longer stored in the store database.

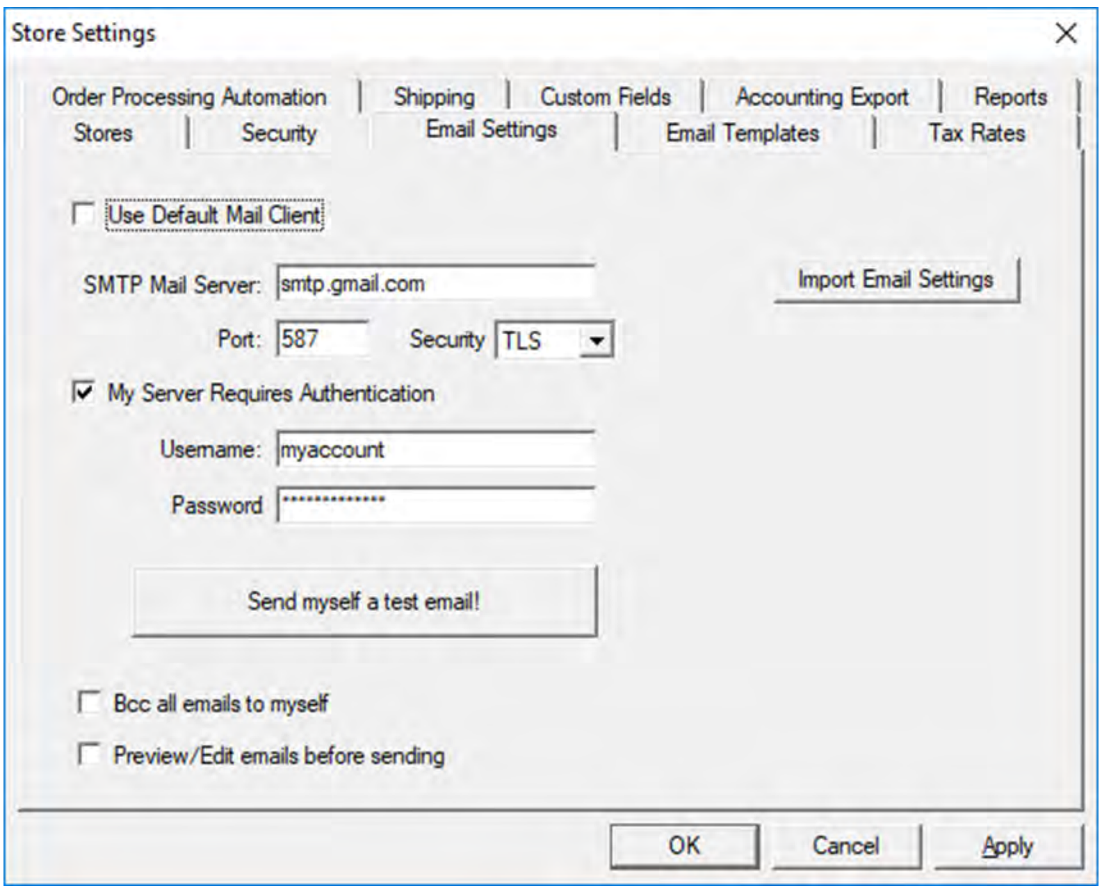
Password Protect this File with the Security Key This option allows you to use the security key to prohibit access to the file.

Allow limited access with no security key

When the protected file is open the user may choose to open the file in limited access mode. When the file is opened in this way the permissions specified in the box below will be given. While logged in with limited access only the allowed permissions will be granted and the user will be unable to change these permissions (and thereby grant themselves access to additional features). When in limited access mode, if the user tries to access a limited feature they will be prompted to enter the security key. At that point the authorized user can grant access on a one-off basis or they can press cancel to cancel the operation.

6.3. Email Settings

Enter your Email Settings here to ensure that you will be able to send emails to customers and to send order shipment status updates back to Yahoo! Store.



Use Default Mail Client SuperManager has two mechanisms by which it can send emails. When you enable this option SuperManager will try to send emails through your MAPI supporting email client. If your default mail client does not support the MAPI protocol you will not be able to use this option. Without this option enabled SuperManager will use its internal email sending functions. Either way should send emails to your customers properly.

Benefits of using the default mail client:

- When using the default mail client you will have a 'sent item' stored in your mail client if you have your mail client set to store them. When you use SuperManager's internal functions, this is only the case for certain mail servers, such as Gmail.

Drawbacks of using the default mail client:

- SuperManager cannot send order status update emails to Yahoo! Store when using this option
- Most mail clients will require you to approve each email sent for security reasons.

SMTP mail server The network address of your mail server. Some mail servers can be finicky or difficult to work with. This is generally caused by server instability and/or security measures server owners put in place to avoid fraud misuse. If SuperManager gives you frequent or occasional errors when trying to send emails, it is recommended to use the server provided by your internet service provider (ISP). The SMTP server you use generally does not impact the email address the emails are sent from or the resulting email your customer receives. For example you can send an email from server smtp.myisp.net and still have your customers receive it as coming from info@thesupermanager.com.

Import Mail Settings This button attempts to grab the mail settings from your Outlook Express mail settings. If you do not have accounts set up in Outlook Express this button will not work.

Port The network port number your SMTP server requires communication to be received on. Typically this is port 25 for non-secure connections, 587 for TLS connections and 465 for SSL connections. Check with your SMTP server administrator to see which port your mail server requires.

Security Many mail servers require either TLS or SSL security. Check with your SMTP server administrator to see if these options are required.

My Server Requires Authentication Most mail servers require authentication to avoid SPAM violations. Check with your SMTP server administrator to find out if authentication is necessary and if it is the username and password you need to use.

Username The username to be used for authentication (if required).

Password The password to be used for authentication (if required).

Send Myself a Test Email Press this button once you have entered all the other settings to make sure the settings are correct. SuperManager will send a test email from the email address on the profiles page and to that same address. If SuperManager says the email sends correctly you can monitor your mail inbox to assure that it is received.

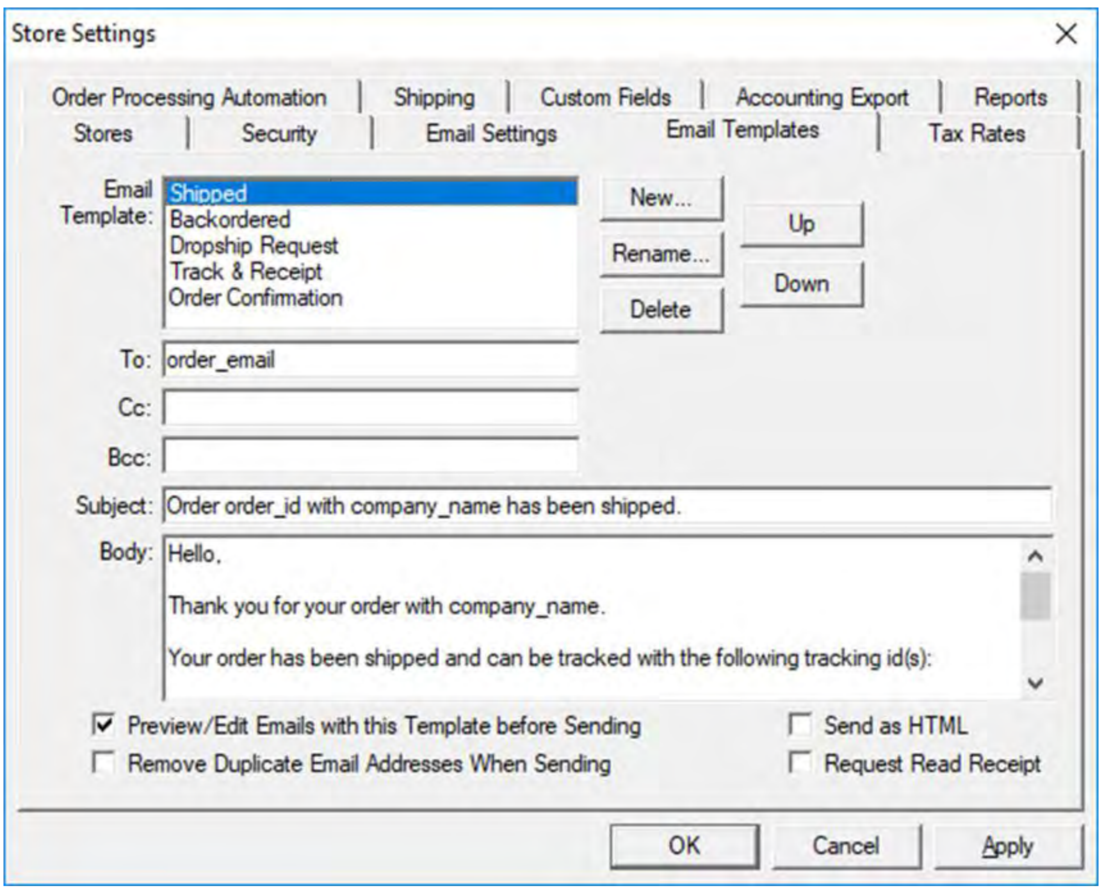
BCC All Emails to Myself Sends a Blind Carbon Copy of each email sent from SuperManager to the email address on the profiles page. This option is especially useful if you are not using the default mail client and would like to have a record of all emails sent in your mail client.

Note: This option applies even to order status update emails. These are in the somewhat cryptic XML format required by the Yahoo! Store update server.

Preview/Edit emails before sending If you do not check this box, emails will be sent to your customers directly based on the email template you have chosen and you will not be able to preview or edit the emails unless you select "Preview/Edit emails with this template before sending" checkbox in the email template. (See section 6.4)

6.4. Email Templates

SuperManager sends emails to your customers based on templates you define in this settings page. You can insert field variables into any of the fields of the email. See the list of field variables in Appendix 12.1.



Email Template List This list contains all the email templates you have defined. You can use the “New…”, “Rename…” and “Delete” buttons to add, remove or rename an email template.

Up/Down Buttons The order the templates are shown on the list determines the order they will appear on the send email menus. You can move them up or down on this list to put the ones you use most often on the top of these menus.

To The email address the order should be sent to. This usually will contain the order_email variable, but you could use other variants for example “order_first_name order_last_name [order_email]” will print the customer’s name in the "To" field of most email reading programs. Note that specifying the “To” field in this way makes email templates usable for applications other than sending emails to customers. You do not have to send these emails to your customers at all. Create a drop ship email template based on your drop ship supplier’s requirements and include the items to be drop shipped in the email. You can specify the drop ship suppliers email as the “To:” email. You can also include your email address in the “To:” field to receive a copy. In this and the other address fields you can add multiple addresses separated by semi-colons or commas.

Cc Any email address(es) you want to Carbon Copy.

Bcc Any email address(es) you want to Blind Carbon Copy. Blind carbon copied email addresses receive a copy, but the other recipients do not know it has been sent to them.

Subject The subject of the email.

Tip: Best practice is to use the field variable company_name to refer to your company. That way you can use the exact same email template for multiple stores.

Body The body of the email. Note that the body can contain HTML rather than only text. Just create the template in an HTML editor, copy the code and make sure to check the “Send as HTML” checkbox. In either case, you can insert the company, order, item and shipment variables in section 12.1 and SuperManager will substitute the relevant information for the order before sending the email.

Preview/Edit Emails with this Template before Sending Enable this option to preview or edit emails before they are sent. If this checkbox is grayed out, then you have specified in the “Email Settings” tab to preview or edit all email templates.

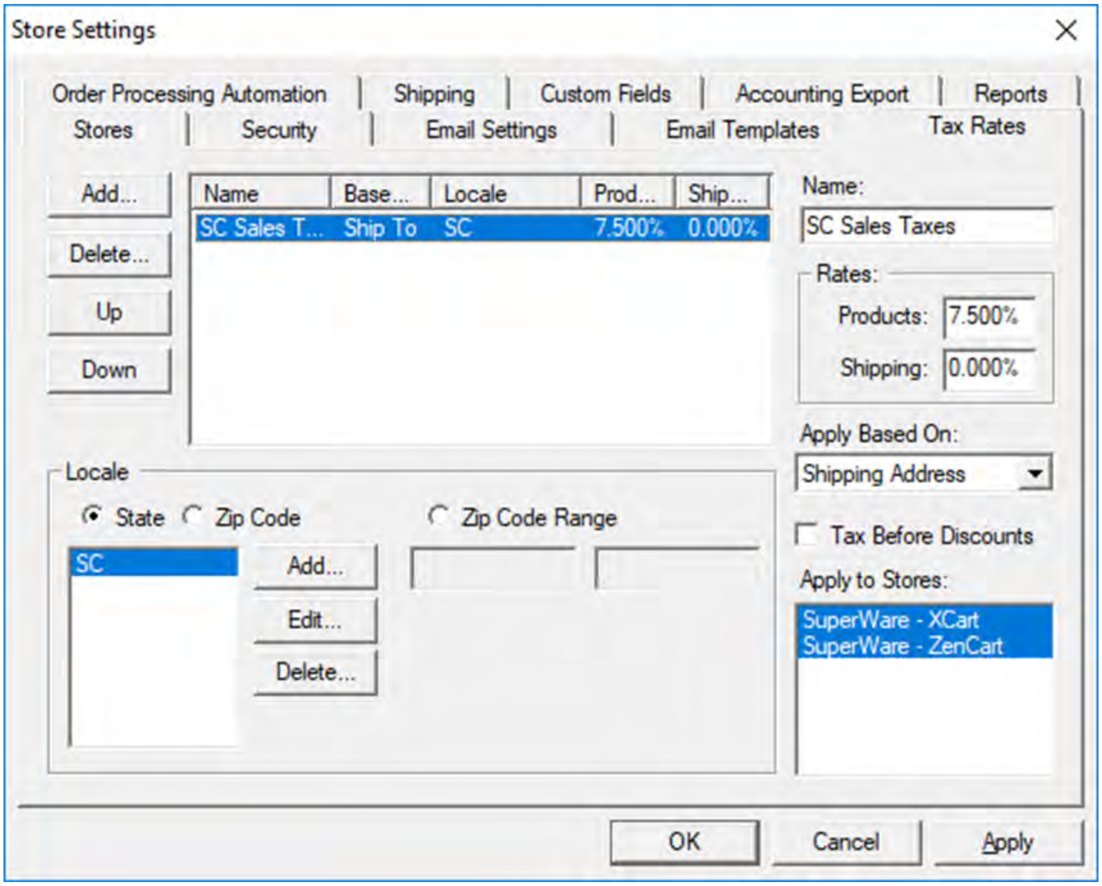
Remove Duplicate Email Addresses When Sending Use this option if you desire that each email in the selected orders when sending the template only receive one copy of the email. This feature is useful for marketing emails advertising specials you are offering, for example.

Send as HTML Use this option if the body contains html code or you would like the email to be sent with text formatting. Most email reading programs will apply a default text formatting if none is applied using html tags.

Request Read Receipt Check this option to request a read receipt for the email.

6.5. Tax Rates

Specify your Tax Rates here. You can enter zip code ranges or just specify a generic tax rule by state. You have the option to specify a different tax rate for products and shipping.



Tax Rate List SuperManager can manage several tax rates. You can use the “Add…” and “Delete…” buttons to add or remove them.

Note: No taxes will be calculated on a downloaded order unless changes are made to it and you agree to re-calculate the taxes when it prompts for your approval. Without such a warning appearing, taxes will be kept at the values set by your shopping cart.

Up and Down Buttons SuperManager will only apply one tax rate to each order. It is therefore, necessary to have the tax rates defined in order of precedence. For example if there are specific zip codes that have a tax rate higher than the default state tax you must have those higher on the list than the default state tax that applies to all other zip codes in the state. The “Up” and “Down” buttons are for ordering tax rates in this manner.

Rates The tax rate that should be applied to products and shipping.

Apply Based On Most states require taxes to be applied based on the shipping address. This setting is offered for versatility.

Tax Before Discounts Most states instruct you to base tax amounts on the post-discount total. This setting is offered for versatility.

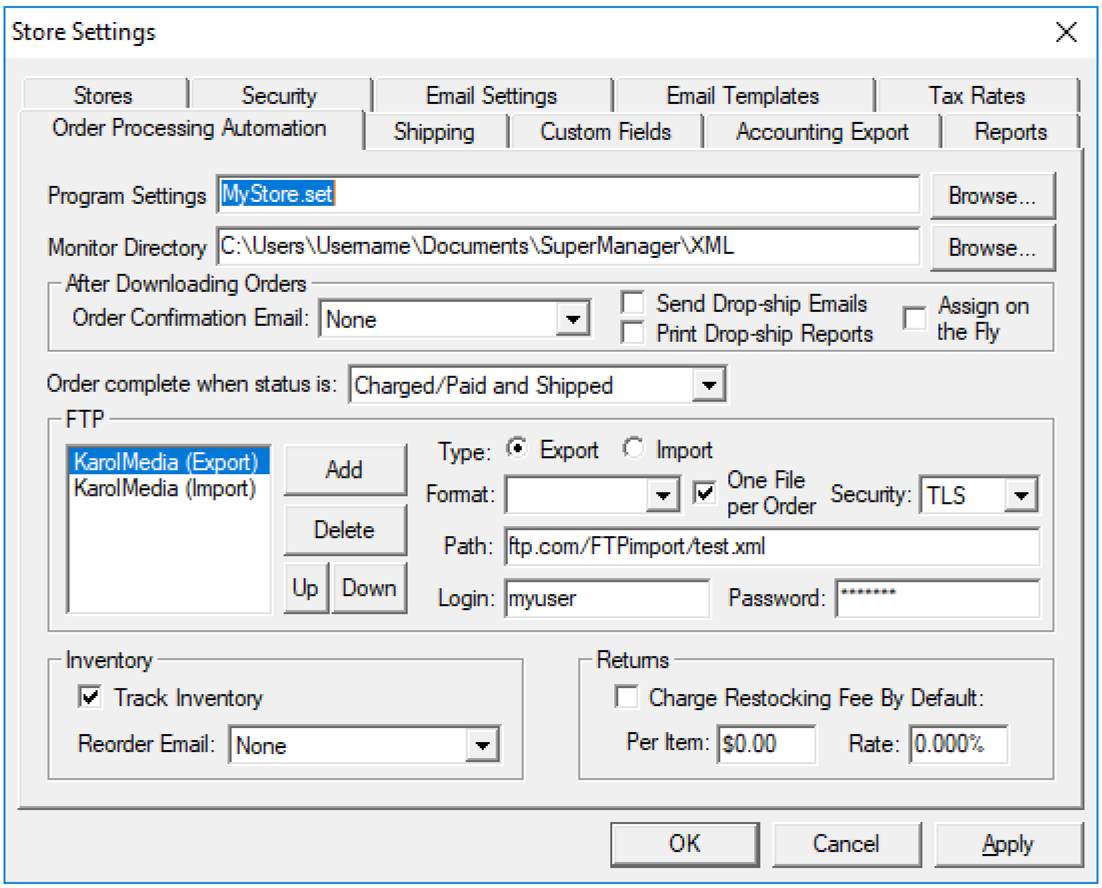
Name This name is shown on the list above for convenience in working with the various tax rates. It is also used as the name of the QuickBooks item to use for taxes resulting from this tax rate and the tax code in QuickBooks Point of Sale (not QuickBooks). See section 11.2 for more information about interfacing with QuickBooks or QuickBooks Point of Sale.

State/Zip Code/Zip Code Range These three options are available for identifying the range of application for a tax rate. You can use any combination of them to completely define the range of applicability. Use the “Add…”, “Edit…” and “Delete” buttons to add applicable areas to the selected tax rate.

Apply to Stores Select the stores this tax rate applies to. Hold down the ctrl key to select more than one store.

6.6. Order Processing Automation

Use this screen to tell SuperManager a little bit about your process.



Program Settings You can enter a path on your computer here for a SuperManager .set program settings file. You can save this file on the program settings screen as described in section 7.1. You can also enter this path relative to the folder where your SuperManager data (.smg) file is located.

Monitor Directory You can enter a path on your computer here for SuperManager to monitor for incoming order XML files. When a new XML file is placed in the folder being monitored, SuperManager will automatically import it for you. This can be used for various automation possibilities. You can also use the “Browse…” button to browse for a folder on your computer.

Order Confirmation Email If you want an email to be sent to each customer when new orders are downloaded, select the email template you want SuperManager to send them here. This will only be sent for new orders, not when you update an order from the shopping cart.

Send Drop-ship Emails This is the first of several settings that have to be in place for sending drop-ship emails for items in orders that are downloaded. After enabling this option you have to create product variants and set the drop-ship flag and supplier for those variants that you want to have drop-ship emails sent for. The supplier must also have an email template selected to use for sending drop-ship emails.

Print Drop-ship Reports Similar to above, you can specify a report that automatically prints when a drop-ship item is ordered. You will have to specify a report template for the supplier for the report to be printed.

Assign on the Fly Allows supplier and dropship information to be defined as needed when sending drop-ship emails. By enabling this, you do not have to have all the variants created and suppliers assigned ahead of time. When SuperManager sends out drop-ship emails, if it encounters a new product variant that does not exist and/or does not have a supplier assigned it will create the variant and prompt you to assign it a supplier.

Order complete when status is This setting dictates what orders are shown in the “Open” and “Closed” tabs on the order list.

Ftp Connection List Multiple Ftp connections can be entered into your store settings for importing and exporting information to/from files on Ftp servers. You can double click on an entry to rename it or use the “Add” and “Delete” buttons to add or delete a connection. The “Up” and “Down” buttons can be used to move the selected connection up or down on the list. The order the connection settings are on this list dictates the order they are shown on the menu lists where you can execute the connections.

[Ftp] Type Select the radio button for whether the selected connection is to import or export information to or from an Ftp server

[Ftp] Format Choose from the dropdown the format to use for importing or exporting. The orders XML format is hardcoded as an import or export. The Karol Media Shipment XML is hardcoded as an import. The other imports and exports come from the text imports and exports defined in your program settings. See sections 7.4 - 7.6 for more information about defining these formats.

[Ftp] One File Per Order For export ftp connections enable this setting if you need to export one file for each order. With this option enabled SuperManager will append the order ID to the filename specified.

[Ftp] Security SuperManager supports exporting to FTP over SSL or TLS. Leave this option as “None” for insecure settings or set it to SSL or TLS for secure connections. Talk to your server administrator if you are not sure which option to use.

[Ftp] Path The path and filename of the file SuperManager should create on the ftp server. For Ftp imports wildcards are supported. In the example above, SuperManager will create a file called “SuperManager*[_orderID]*.xml” (See the One File Per Order option above for why the order ID is appended)

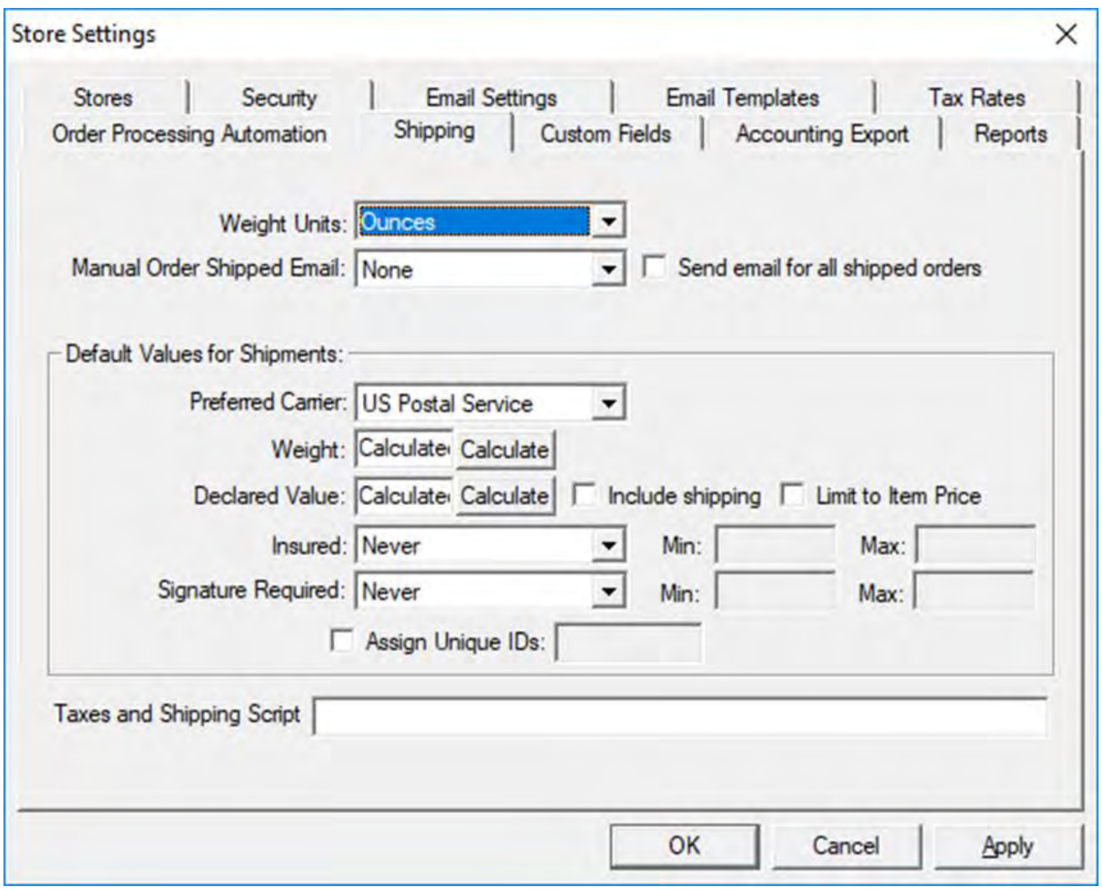
[Ftp] Login The username for the ftp server

[Ftp] Password The password for the ftp server

[Inventory] Track Inventory	Enable this option to turn on tracking of inventory for your products. Inventory is tracked on the product variant level and therefore will only be tracked on products that have product variants created. This will be further discussed in section 9.0.
[Inventory] Reorder Email	You can select an email template for SuperManager to send each time a re-order point is reached for any item. See section 9.4.b for instructions on how to define this limit for your products.
[Returns] Charge Restocking Fee by Default	Enable this option to charge a restocking fee whenever a return is added to an order
[Returns] Standard Restocking Per Item Fee	The fee applied to each item returned when the option above is enabled
[Returns] Standard Restocking Fee Rate	The rate (in percent) applied to returns when the option above is enabled

6.7. Shipping

Default values and other settings for your shipments are entered here.



Weight Units Yahoo! Store and some other shopping cart weights are unitless. The SuperManager is able to import and export in pounds, ounces, grams or kilograms. This setting tells The SuperManager how it should interpret the weights it receives from your shopping cart. These will then be converted to whichever weight you request when you import or export to another program. The SuperManager also uses this setting to determine what weight should be assumed if none is given and what units of weight should be displayed in on the dialogs.

Manual Order Shipped Email When you add tracking numbers to shipments SuperManager will ask if you would like to send shipment information updates to your customer(s). If you choose to do so or manually request SuperManager to send shipping updates SuperManager will send the status update to your shopping cart. Manual orders and orders through shopping carts that don't support shipment updates will receive this email template instead.

Note: For to send updates back to Yahoo! Store you must fill in the tracking password (See section 6.1). If the tracking password is left blank SuperManager will send this email template to your Yahoo! Store customers instead.

Send email for all orders Enable this option if you want the manual order shipped email to be sent for all orders and not just manual orders.

Preferred Carrier This is the carrier that all shipments will be initialized to when new orders are downloaded, manual orders are created and new shipments are added to orders. This can be changed on a shipment-by-shipment basis, but this is the default value. If the carrier you would like to set as default does not appear on this list you will need to add it, as explained in section 6.8.e.

Weight The SuperManager helps you get a good estimate of the weights of each shipment. By default, shipment weights are calculated as the sum of the product weights within the shipment plus this default packaging weight (See section 6.8.f). In order for this approach to be accurate you will need to make sure all your products have weights assigned to them (See section 9.4) If you prefer to have one constant weight used for all shipments you can enter that here. To change it back to calculating the weight from the items and packaging weight, press the "Calculate" button. Note that the final weight assigned to a single shipment can be changed on the shipment details screen (See section 8.5.d).

Declared Value By default, shipment declared values are calculated as the sum of the product declared values. In order for this approach to be accurate you will need to make sure all your products have appropriate declared values assigned to them. If you prefer to have one constant declared value used for all shipments you can enter that here. To change it back to calculating the value from the items, press the "Calculate" button. Note that the final declared value assigned to a single shipment can be changed on the shipment details screen (See section 8.5.d).

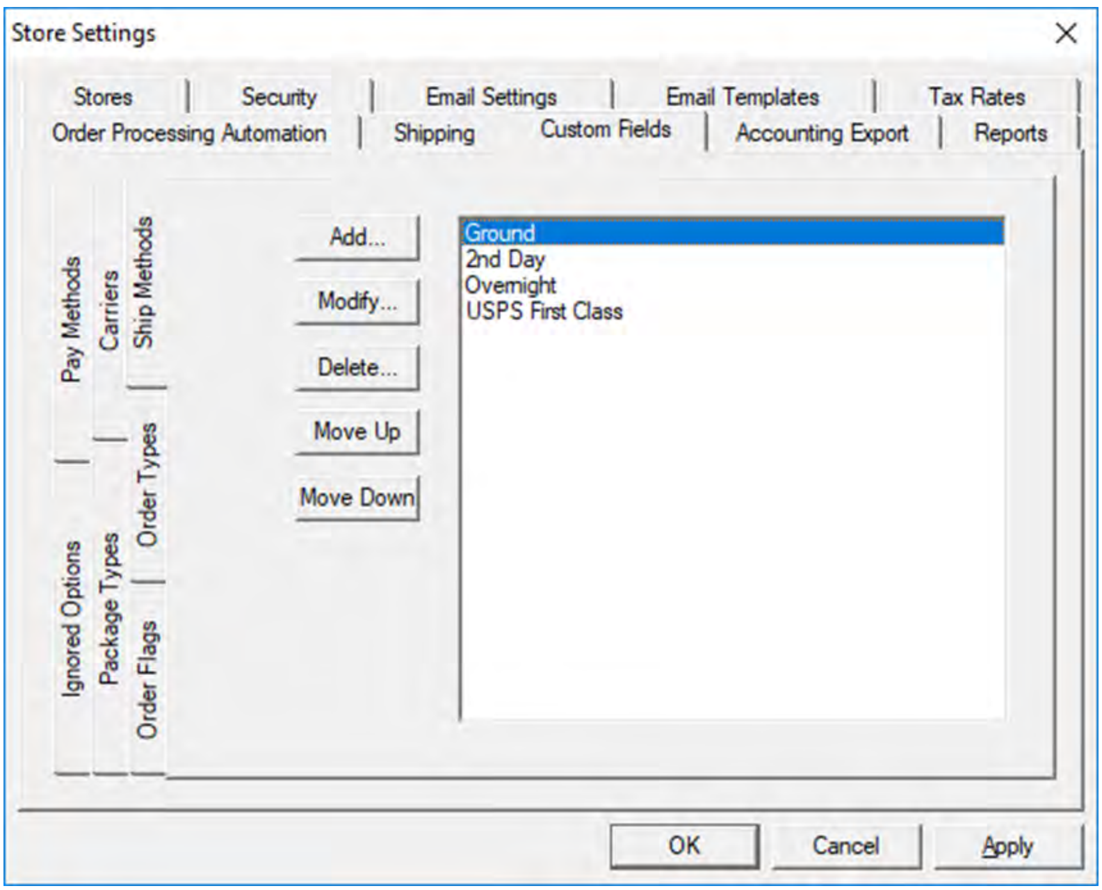
Insured This setting dictates whether shipments default to insured or non-insured. You can set it so that none, domestic, international, all shipments or shipments with a given range of declared value are defaulted to insured. The value can be changed for individual shipments on the shipment details screen.

Sig Required This setting dictates whether shipments default to signature required. You can set it so that none, domestic, international, all shipments or shipments with a given range of declared value are defaulted to signature required. The value can be changed for individual shipments on the shipment details screen.

Taxes and Shipping Script Yahoo! Store supports using a script to determine the amount of taxes and shipping that should be collected from the customer. If you have such a script set up, SuperManager will also use it to calculate taxes and shipping. If you are not using Yahoo! Store, but would like to use this feature with SuperManager, you can see the documentation of how it works, including an example here: https://help.smallbusiness.yahoo.net/s/article/SLN19403.

6.8. Custom Fields

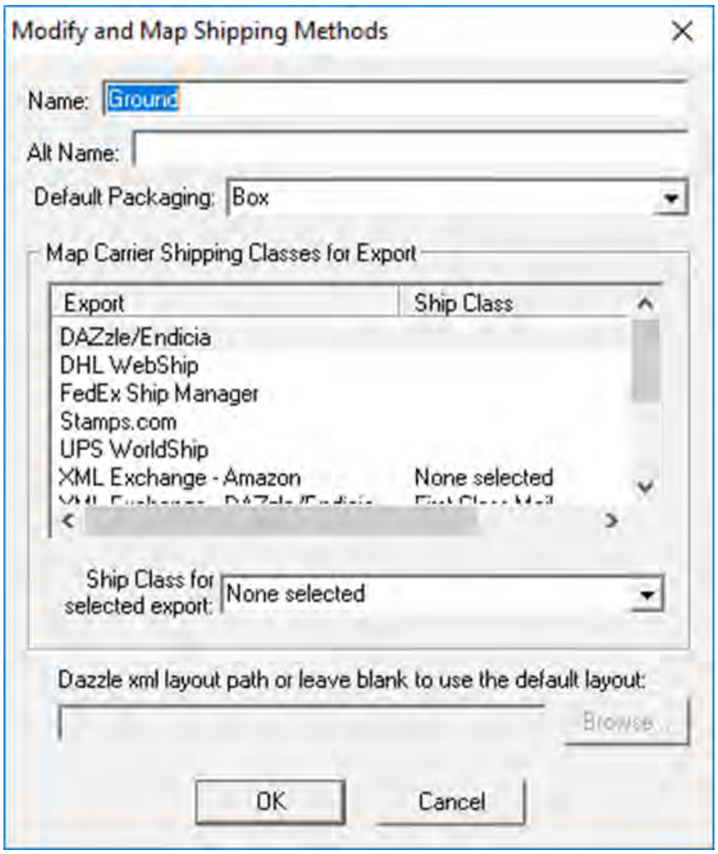
This screen allows you to set payment and ship methods as they are set in your shopping cart, specify order types to be assigned to manual orders created offline, and keep a set of carriers and packaging types to be used in shipping orders. Payment and shipping methods will be added to this list as new ones are encountered in the orders The SuperManager downloads. For Yahoo! Store owners, they will also be added when you run the "Update Products" function described in section 9.1. Order types, carriers and packaging types are not stored in Yahoo! Store. They are unique to The SuperManager.



The list will display the list of items selected in the tabs at the left. Use the "Add…" and "Delete…" buttons to add or delete items from the list. When you delete an item The SuperManager will prompt you for a pay method, ship method or order type to move all orders containing this method/type with. The "Modify…" button allows you to change the name of an order type or Pay Method and give you other additional settings for some of the custom fields as described below.

6.8.a Shipping Methods

To accurately export your orders to your shipping software, you will need to map each of your shopping cart's shipping methods to each carrier shipping class you will be using for that specific shipping method. To open the "Modify or Map Shipping" dialog, first click the "Shipping Method" tab and then double click on the shipping method or select the shipping method and then click the "Modify" button. After filling in these settings when you select orders on the order list and export them using a text export format the settings from this dialog will be used to determine how to replace the variable shipment_shipping_class. For more information about building text exports, see section 7.4.



Name You may change the name of the ship method here. Any changes made here will not, however, change the settings in your shopping cart.

Alt Name The name that should be sent to Amazon and can be accessed using the ship_method_alt variables

Default Packaging This is the default packaging type assigned to each shipment with this ship method. You can then change the packaging type for each shipment individually on the shipment details screen (See section 8.5.d).

Map Carrier Shipping Classes for Export	These are the shipment export formats you have entered using the directions in section 7.4 and the XML Exchange formats offered natively in SuperManager. Once you select a carrier the shipping classes entered for this export format (See section 7.4) will appear in the “Ship Class for selected export” dropdown. You can specify “Do not export with this format”. If this is selected when you select an order containing this ship method and export it with this format, the order will not be included in the export. If you select “None selected” SuperManager will give an error that the ship method has not been linked to a shipping class for that export. You should repeat the process of selecting an export from the list and then selecting the ship class for that export from the dropdown until ship classes are specified for each export you may want to use with this ship method. **Note:** The XML Exchange items on this list always appear and are the settings for XML files exported. The other items on the list are the export formats you have defined in your program settings. If you intend to use XML make sure you select these entries rather than the text exports for DAZzle, FedEx, Stamps.com or WorldShip that may exist in the top of the list.
DAZzle xml layout path	This option only applies to the “XML Exchange – DAZzle/Endicia” shipping export. You must select this item from the list above to be able to set this setting. In it you should enter the path to the DAZzle layout that should be used for this shipment method. This path can be entered as an absolute path or as a path relative to the your SuperManager data file.

6.8.b Order Types

In general order types are for specifying how offline orders are received. You can include such types as fax, phone and email to distinguish how your orders are received. By default the order type for downloaded orders is “eStore”. This type may not be deleted, but the name may be changed if you so desire.

6.8.c Order Flags

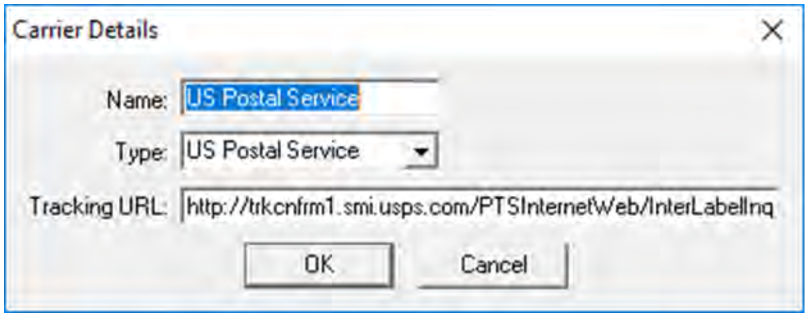
Order flags are another form of status field that can be assigned to each order. You can use it to keep track of reasons why orders are on hold or anything else that you would like to.

6.8.d Pay Methods

As mentioned above, if you use Yahoo! Store, pay methods are added from your settings when you download products or orders. For other platforms, pay methods are added only when you download orders. As with ship methods, their names can be changed in SuperManager, but this will not affect your settings in your shopping cart.

6.8.e Carriers

The carrier list allows you to specify which carrier was used to ship shipments in SuperManager. Additionally carriers have a few additional settings that can be set/modified on the details screen below. To get to this screen double click on the carrier you want to view/modify or select it on the list and click “Modify…”



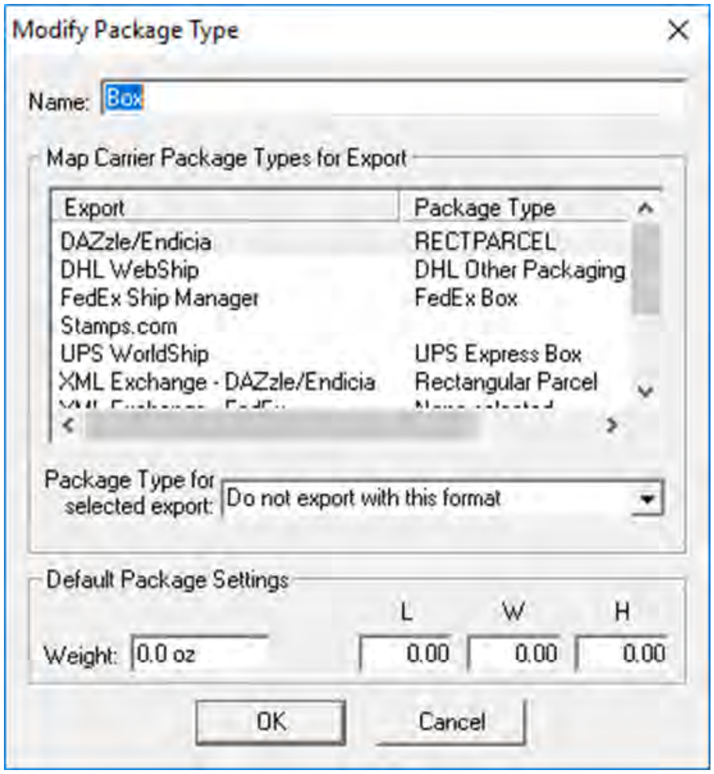
Name Changes the name as it will appear on the carrier list and the select box on the shipment details screen.

Type Four carriers are supported for the order status update system in Yahoo! Store: US Postal Service, UPS, FedEx and DHL (includes former Airborne). If you use Yahoo! Store, the type you select determines which shipping carrier to update to Yahoo! Store when an order status update is sent.

Tracking URL This format will be used for tracking within the SuperManager and sending links using the shipment_tracking_url field variable. You should use the shipment_tracking_id or other field variables where they belong in the url.

6.8.f Packaging Types

A packaging type list is also available to declaring the packaging type used to ship shipments in SuperManager. More particularly, this list serves primarily as a user friendly name and categorization of the often times not-so-user-friendly names required by 3rd party shipping programs. For example, DAZzle uses the name “RECTPARCEL” to represent a box. The package type list allows you to assign a user friendly name “Box” to mean “RECTPARCEL” when a DAZzle file is exported and “UPS Box” when you export to WorldShip and so on. You can view and change the details of the package types by double clicking on a type on the list or selecting one and clicking “Modify…”. When you do the following details screen will appear.



Name Changes the name as it will appear on the package type list and the select box on the shipment details screen.

Map Carrier Package Types for Export Different shipping vendors and shipping software have different names for different package types that you may use for shipping orders. For that reason, it is necessary to map your SuperManager package types to the names used by each shipping vender/software that you use.

These are the shipment export formats you have entered using the directions in section 7.4 and the XML Exchange formats offered natively in SuperManager. Once you select a carrier the package types entered for this export format (See section 7.4) will appear in the “Package Type for selected export” dropdown. You can specify “Do not export with this format”. If this is selected when you select an order containing this ship method and export it with this format, the order will not be included in the export. If you select “None selected” SuperManager will give an error that the package type has not been linked to a package type for that export. You should repeat the process of selecting an export from the list and then selecting the package type for that export from the dropdown until package types are specified for each export you may want to use with this package type.

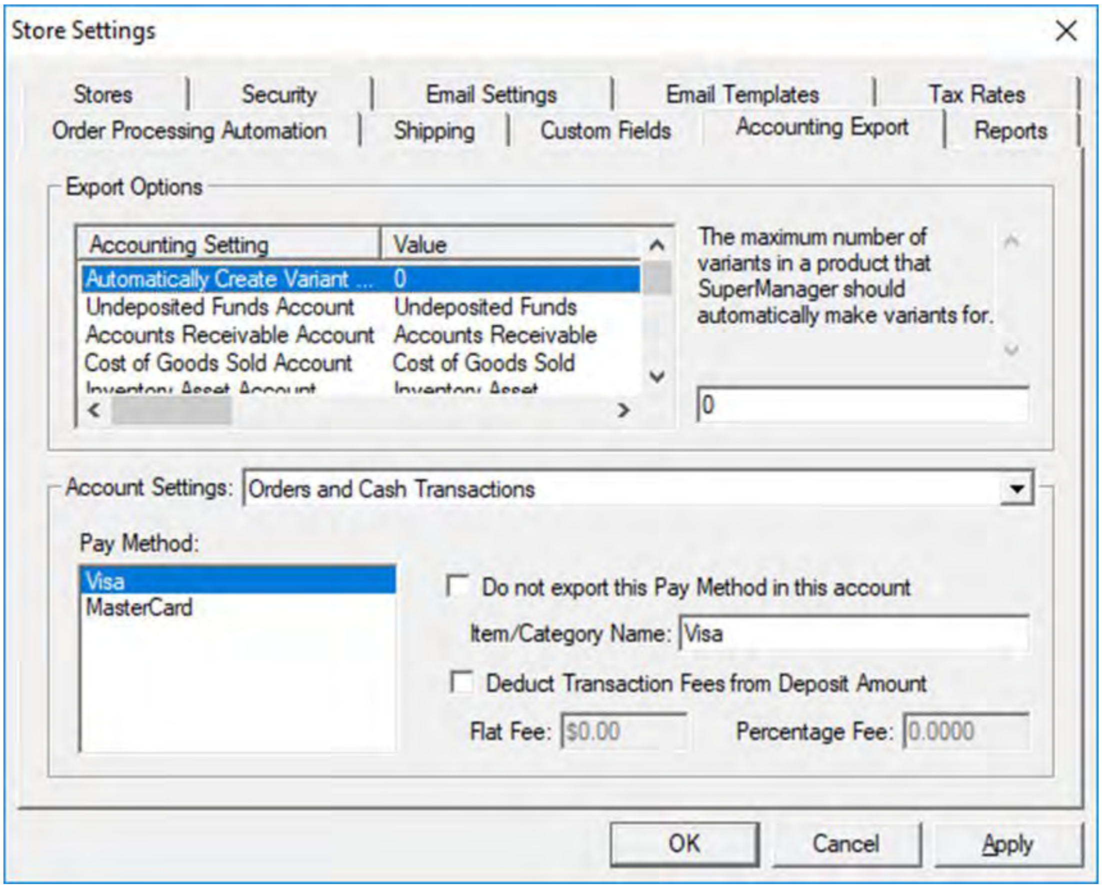
Note: The XML Exchange items on this list always appear and are the settings for XML files exported. The other items on the list are the export formats you have defined in your program settings. If you intend to use XML make sure you select these entries rather than the text exports for DAZzle, FedEx, Stamps.com or WorldShip that may exist in the top of the list.

Default Package Weight SuperManager can calculate weight for each shipment, depending on the settings you set for default shipment weight (See section 6.6). Enter the weight of the empty package here so that it can more correctly calculate the weight of the filled package.

Default Package Dimensions Some shipping venders require dimensions for each package or will give price discounts if this information is provided. You can enter the dimensions for this package type here so that SuperManager will default to the right dimensions for each new shipment using this package type. You can then change the dimensions for individual shipments on the shipment details screen (See section 8.5.d).

6.9. Accounting Export

Use the Accounting Export settings Dialog to specify how you would like to export your transactions to your accounting software.



Export Options: When you export batches or orders to accounting software the category/item names assigned to different transaction line items will come from this dialog. You need to make sure that there are corresponding categories or items in your accounting software to receive the category or item name given here. For more information about exporting to accounting software see section 10.2.

Automatically Create Variants

When this option is greater than zero SuperManager will create new variants underneath products up to the amount you enter here. This relates to QuickBooks, but is not exclusively for interfacing with QuickBooks. Variants store alternative product codes that can be used to give QuickBooks or QuickBooks POS item names if they do not match the default SuperManager item names (i.e. *product_code*:*variant_name*). They are also, however, used for storing inventory levels and setting up dropship automation. If you are exporting to QuickBooks on a variant level or are tracking inventory in SuperManager you will want to set this value to a reasonable threshold. You may have products with thousands of options that you do not intend to track in the same manner and the number you should choose should be low enough to filter out such products.

Undeposited Funds Account

If this account is left as “Undeposited funds” the amounts received in each order will be deposited to undeposited funds. You can then claim the money in this account by making a deposit in QuickBooks. If you want money collected through your orders to deposit to some other account you can set this account here. If this account is a sub-account you will need to give the full name of the account by in the form “<*Parent Account*> : <*Sub-account*>”.

Accounts Receivable Account

The name of your accounts receivable account as described above. This account is used as the accounts receivable account when SuperManager adds items to QuickBooks. If this account is a sub-account you will need to give the full name of the account in the form “<*Parent Account*> : <*Sub-account*>”.

Cost of Goods Sold Account

The name of your cost of goods sold account as described above. This account is used as the cost of goods sold account when SuperManager adds items to QuickBooks. If this account is a sub-account you will need to give the full name of the account in the form “<*Parent Account*> : <*Sub-account*>”.

Inventory Asset Account

The name of your inventory asset account as described above. This account is used as the inventory asset account when SuperManager adds items to QuickBooks. If this account is a sub-account you will need to give the full name of the account in the form “<*Parent Account*> : <*Sub-account*>”.

Taxable Sales Account/Item

The name of your taxable sales account as described above. If this account is a sub-account you will need to give the full name of the account by in the form “<*Parent Account*> : <*Sub-account*>”. This setting is also used as the item name for the sum of your taxable sales for batches exported from The SuperManager. If this item does not exist in QuickBooks it will be created.

Nontaxable Sales Account/Item

The name of your nontaxable sales account as described above. If this account is a sub-account you will need to give the full name of the account by in the form “<*Parent Account*> : <*Sub-account*>”. This setting is also used as the item name for the sum of your nontaxable sales for batches exported from The SuperManager. If this item does not exist in QuickBooks it will be created.

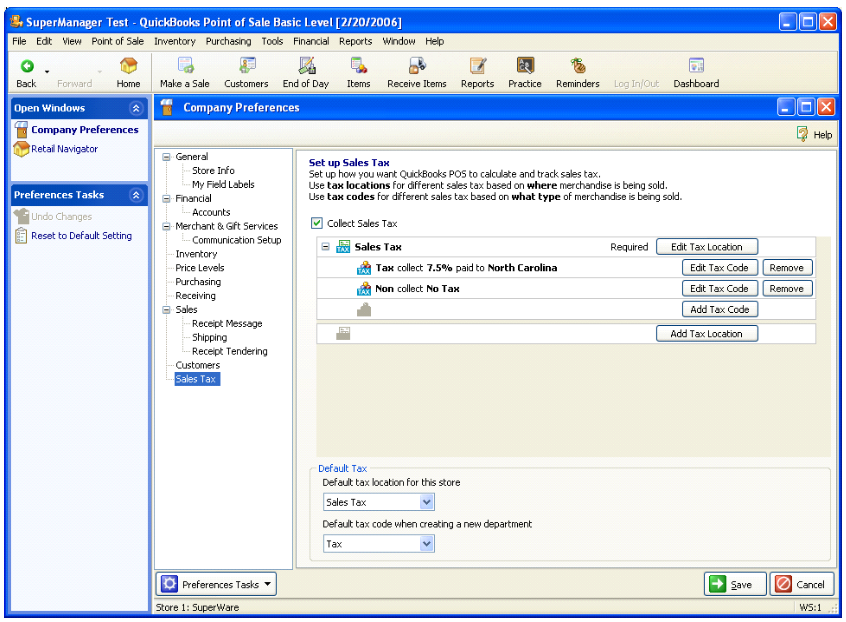
Shipping Item

The name of the item to be used for shipping fees collected from your customers. If this item does not exist it will be created.

Tax Item **QuickBooks Desktop:** SuperManager generally uses the name of the tax rate that applies to an order for the name of the QuickBooks item for taxes. If SuperManager is unable to determine a tax rate for a given order that has a non-zero tax amount, it will use this item name. If this item does not exist in QuickBooks it will be created.

QuickBooks Online: If your QuickBooks Online account automatically determines tax rates based on tax agencies you add to your account, this setting can be left blank. If your QuickBooks Online account uses different service items for manually applying sales tax, this is the name of the sales tax code. If you use different for different orders (perhaps going to different states) you can set this to “order_tax_rate” and then make sure the tax rates are populated appropriately in SuperManager and that the tax rate names correspond to the QuickBooks Online tax code names.

QuickBooks POS: This field must contain the name of the “Tax Location” SuperManager should use. To determine the proper name of your tax location in POS go to “Edit”, “Preferences”, “Company” from the main menu. A screen similar to the one shown below should appear



In this example “Sales Tax” is the name of the tax location. Your settings may have several tax locations setup. SuperManager is only able to work with one tax location for doing all of its exports. You may need to create a new location just for exporting orders from The SuperManager. Underneath this tax location in POS you need to have one “Tax Code” for non-taxable items (for example those that are purchased by out of state customers) and one for each tax rate that you have defined in The SuperManager.

Tax Reference Item **QuickBooks Desktop:** The name of the item to be linked to each sales receipt/invoice as the “Tax” field. If this item does not exist in QuickBooks it will be created. By default SuperManager will create a tax reference item with a 0% tax rate and then impose the tax calculated by your shopping cart using line items of the tax item explained above. If instead you want SuperManager to have QuickBooks calculate the taxes itself, enter the keyword “order_tax_rate” as the value for this field.

QuickBooks Online: Not used

QuickBooks POS: Not used

Gift Wrap Item	The name of the item to be used for gift wrap fees collected from your customers. If this item does not exist in QuickBooks it will be created.
Discount Item	The name of the item to be used for discounts given to your customers. If this item does not exist in QuickBooks it will be created.
Adjustment Item	The name of the item to be used for adjustments made to order totals. If this item does not exist in QuickBooks it will be created.
Coupon Item	The name of the item to be used for coupons applied to orders. If this item does not exist in QuickBooks it will be created.
Gift Certificate Item	The name of the item to be used for gift certificates applied to orders. If this item does not exist in QuickBooks it will be created.
Credit Item	The name of the item to be used for credits applied to orders. If this item does not exist in QuickBooks it will be created.
Restocking Fee Item	The name of the item to be used for restocking fees subtracted from applied to orders. If this item does not exist in QuickBooks it will be created.
Fees Item	The name of the item to be used for merchant fees subtracted from batches. If this item does not exist in QuickBooks it will be created.
Shipping Paid Item	The name of the item to be used for batch exports with shipping payments back to the sales channel
Taxes Paid Item	The name of the item to be used for batch exports with tax payments back to the sales channel
Taxable Tax Code	**QuickBooks Desktop:** The 3-letter code for taxable line items. If this tax code does not exist in QuickBooks it will be created for you. **QuickBooks Online:** If your QuickBooks Online account automatically determines tax rates based on tax agencies you add to your account, this setting should be “order_tax_rate”. If your QuickBooks Online account uses different service items for manually applying sales tax, this setting should be “TAX”. **QuickBooks POS:** This is the name of the “Tax Code” that should be applied when sales tax is due on an item or order.
Nontaxable Tax Code	**QuickBooks Desktop:** The 3-letter code for nontaxable line items. If this tax code does not exist in QuickBooks it will be created for you. **QuickBooks Online:** If your QuickBooks Online account automatically determines tax rates based on tax agencies you add to your account, this setting should be “order_tax_rate”. If your QuickBooks Online account uses different service items for manually applying sales tax, this setting should be “NON”. **QuickBooks POS:** This is the name of the “Tax Code” that should be applied when no sales tax is due on an item or order.
Shipping is Taxable	Determines whether shipping costs will be marked with a taxable or nontaxable tax code.
Export Orders As	Allows you to set whether orders will be exported as sales receipts, invoices or sales orders in QuickBooks

Export POs As	Allows you to set whether POs will be exported as bills or purchase orders in QuickBooks
QuickBooks File Path	The full path of your QuickBooks file. If this field is left blank you will need to have QuickBooks open with the proper file loaded to export information. **WARNING:** If the field is blank and you have QuickBooks open to another store when you export objects they will be created in the file that you have open.
QuickBooks Customer Type	The customer type to be assigned to all customers created when exporting orders to QuickBooks. This field can be left blank. It may contain any of the store settings variables or order variables (See section 12.1).
QuickBooks Customer Account	The customer account to be assigned to all customers created when exporting orders to QuickBooks. This field can be left blank. It may contain any of the store settings variables or order variables (See section 12.1).
QuickBooks Template	The QuickBooks transaction template to be used for exporting orders. This field can be left blank to use the default template.
QuickBooks Transaction Class	SuperManager can apply classes on the line item and/or transaction level. If you want classes applied to each transaction enter one here. This field can be left blank. It may contain any of the store settings variables or order variables when exporting orders and batch variables when exporting batches (See section 12.1).
QuickBooks Line Item Class	If you want classes applied to each line item enter one here. This field can be left blank. It may contain any of the store settings variables or order variables when exporting orders and batch variables when exporting batches (See section 12.1).
QuickBooks Inventory Site	The inventory site to pull order items from when exporting invoices or sales receipts. This field can be left blank. It may contain any of the store settings variables or order variables (See section 12.1).
QuickBooks Invoice PO Number	The value to fill in the PO Number field if orders are exported with invoices into QuickBooks. This field can be left blank. It may contain any of the store settings variables or order variables (See section 12.1).
QuickBooks Sales Rep Initials	The initials of the sales rep to be associated with each order exported to QuickBooks. This field can be left blank. May contain any of the store settings variables or order variables when exporting orders and batch variables when exporting batches (See section 12.1).
QuickBooks Payment Method	The value to use for the QuickBooks payment method field for orders exported as sales receipts. This field can be left blank. It may contain any of the store settings variables or order variables (See section 12.1).
QuickBooks Other Field	The value to use for the QuickBooks “other” field. This field can be left blank. It may contain any of the store settings variables or order variables (See section 12.1).
QuickBooks Price Level List	The name of the price level list to apply to all items exported in QuickBooks orders. This field can be left blank if price level lists should not be assigned to your order items.

QuickBooks Group Price Adjust Item SuperManager supports linking to QuickBooks item groups. This is a good way to handle situations where you are tracking inventory in QuickBooks and certain items you sell in your online store require multiple inventoried items being sent to the customer. In such instances, however, SuperManager is not able to export the exact price charged to the customer so it checks the total price for the group and adds an adjustment to make the total match up. When it does this, it uses the item name you specify here for that adjustment. If this item does not exist in QuickBooks it will be added for you.

QuickBooks Online Company The QuickBooks Online company number to import your orders into. This is found by logging into your QuickBooks online account. Click on the gear to take you to the company settings and click on the “Billing & Subscription” tab. The company ID will be displayed in the top left corner of this screen. Enter it here without any spaces. You can also leave this blank and SuperManager will tell you how to copy and paste it during the authentication phase.

QuickBooks Online Token Leave this value blank. SuperManager will populate it the first time you export to QuickBooks Online by authenticating to your company. Under certain circumstances you may need to re-authenticate with QuickBooks Online. To do so, you can empty this field and SuperManager will re-authenticate.

QuickBooks Online Secret Leave this value blank. SuperManager will populate it the first time you export to QuickBooks Online by authenticating to your company. Under certain circumstances you may need to re-authenticate with QuickBooks Online. To do so, you can empty this field and SuperManager will re-authenticate.

QuickBooks POS Server: The network name of the machine on which the POS server is running. This should match the settings you had to enter to your client workstations if you are running POS on a network with more than one workstation.

QuickBooks POS Company: The name of the “company data” you want to connect to. This name should appear before “ – QuickBooks Point of Sale….” on the title bar of POS when you have it open.

QuickBooks POS Department The department to assign new products to when SuperManager has to make new QuickBooks POS products.

Lookup POS Items Using: SuperManager can lookup items by Item Number, ALU, Desciption1, Description2 and SKU fields in POS. Set this option to the field that you would like to use to link your shopping cart’s products with POS.

Account Settings: Separate account settings are stored for Orders and Cash Transactions exports and for each account. When exporting individual orders as sales receipts, invoices or sales orders into QuickBooks the “Order and Cash Transactions” settings are the only ones that will be used. When exporting batches you can apply different settings to each individual merchant account and a separate set for transactions made outside of your Yahoo merchant accounts.

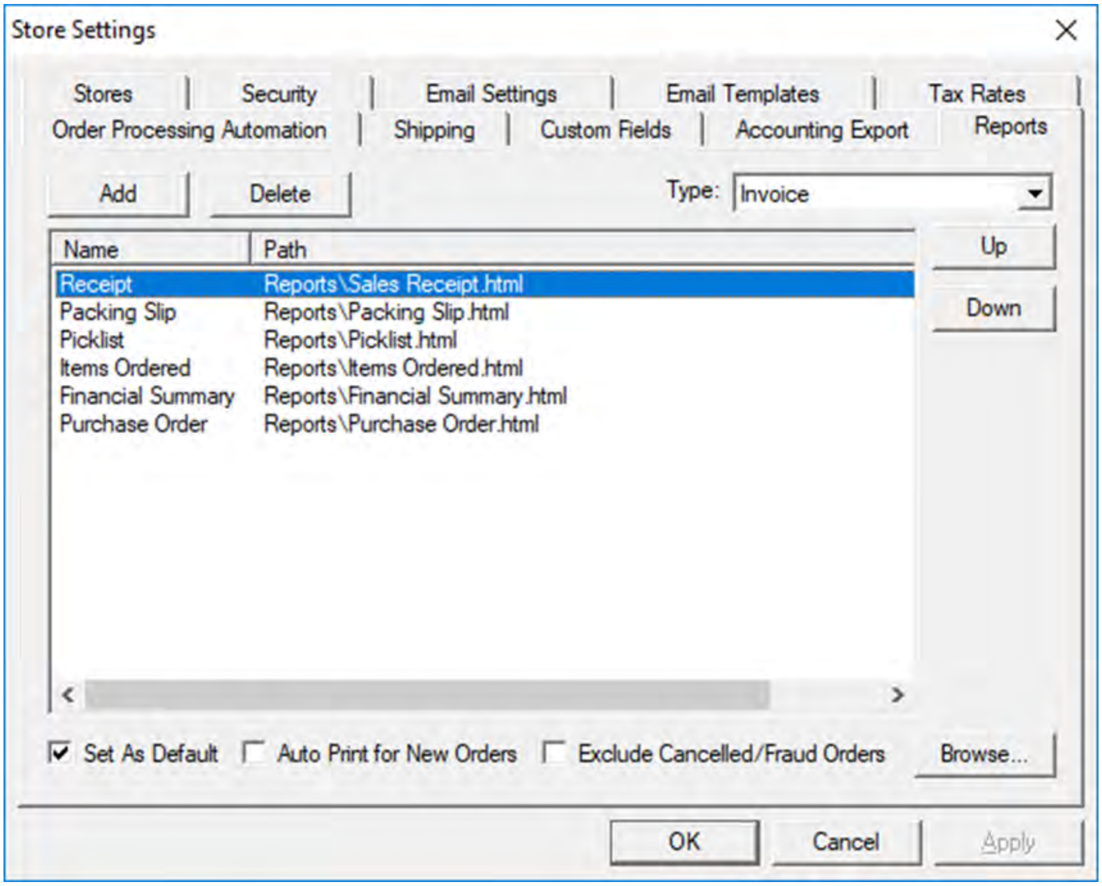
Do no export this pay method in this account: Any amounts received from this pay method will be ignored when creating the batch. Should a payment using this pay method be found in a batch it will be lumped into an “Unknown Payments” line item.

Item/Category Name: The name of the item to be used for the payments received from this pay method. If this field is left blank, SuperManager will use the name of the pay method for the item name, but will give a warning message each time it uses it.

Deduct Transactions Fees from Payment Amount: This is used for batch exports to QuickBooks and when creating batches inside of SuperManager. If your merchant bank deducts fees directly from your batch deposits you can use these settings to match the fees your bank deducts. You can enter a per-transaction fee and/or a percentage fee to be deducted. When exporting batches, these fees will be deducts using the “Fees Item” as discussed above.

6.10. Report Templates for Invoices and Reports

Use this store setting page to specify different invoices and summary reports. For example you can specify templates to be used for multiple invoices (default, gift, purchase order, backorder, etc.) and summary reports (pick list, order summary, etc.) to use with The SuperManager. The invoice and summary report template you set as default will be used in the order list popup menu function “Print Invoice” and “Print Summary”. The default invoice will also be used when you press ctrl-P.



Report List This list contains all the report templates defined in your store settings. Several reports are copied to the MyDocuments\SuperManager directory when you install SuperManager. By default, if these files still exist they will be added to new store databases. You can use the “Add” and “Delete” buttons to add new report templates or delete existing ones. Press the “Browse…” button to select the file using the windows file picker. Double click on an entry to manually edit the path of the template. Paths are stored relative to the SuperManager data (.smg) file by default, but you can also specify an absolute path when you manually edit the path in this manner. Click, then pause for one second, then click again on the name of a report to rename the report.

Type The type of the report the selected template is. The following report types are available:

- Invoice – For creating reports one per each order. Typically these will be used for invoices/sales receipts.
- Summary – For summarizing order data. When this type is selected total numbers of items ordered, sum of funds collected, etc… are reported rather than individual data for each order.
- Range – For line iteming order data. One line will be exported for each order. Typically these will be used for giving register type reports of funds received.
- Packing Slip – For creating reports one per each shipment. Typically these will be used for packing slips.
- Purchase Order – For creating purchase orders.

Set as Default Sets the report as the default report of all reports of the same type. There may only be one default report of each type. The default report is used when you select to print the "Default <type>" from print menus.

Autoprint for New Orders When this option is checked, the selected order will be printed for each new order/set of orders when orders are downloaded.

Exclude Canceled/Fraud Orders For reports that report order data, exclude any orders that are marked canceled or fraud status.

6.10.a Creating Invoice Templates

The SuperManager uses html templates to create reports. You can create such files in one of many readily available html editors. Recommended editors include Microsoft® Expression Web®, Microsoft® FrontPage® and many others. Use the html editor to create the overall layout of the report. Use the variable list in section 12.1 when making your invoice templates. The SuperManager will replace the variables you have included in your invoice template with the specific order information. Several generic and sample templates are included for your reference and we can help you create custom report templates. A few simple rules will help you in generating successful reports:

Invoice Reports, Packing Slips and Purchase Orders

- A ".pagebreak" style class must be defined for generating a page break between orders. See the sample templates for the exact format of this class. SuperManager will automatically add a page break in between orders using this class.
- "item_", "backordered_item_", "canceled_item_", "returned_item_", "defective_item_", "shipment_" and "total_" field variables must be found within a TR element. When one of these variables is encountered SuperManager will traverse up the HTML code until it finds the <TR> tag, then down the HTML until it finds a </TR> tag. It will then create a row for each item, backordered item, shipment or total respectively. Do not include these field variables outside of a TR element or where you do not want them to be handled in this manner.
- **Recommendation:** It is recommended, but not required to use THEAD and TFOOT elements using the style table-group-header and table-group-footer respectively to create repeating headers and footers at the top and bottom of the items, shipments and totals tables.

Summary Reports

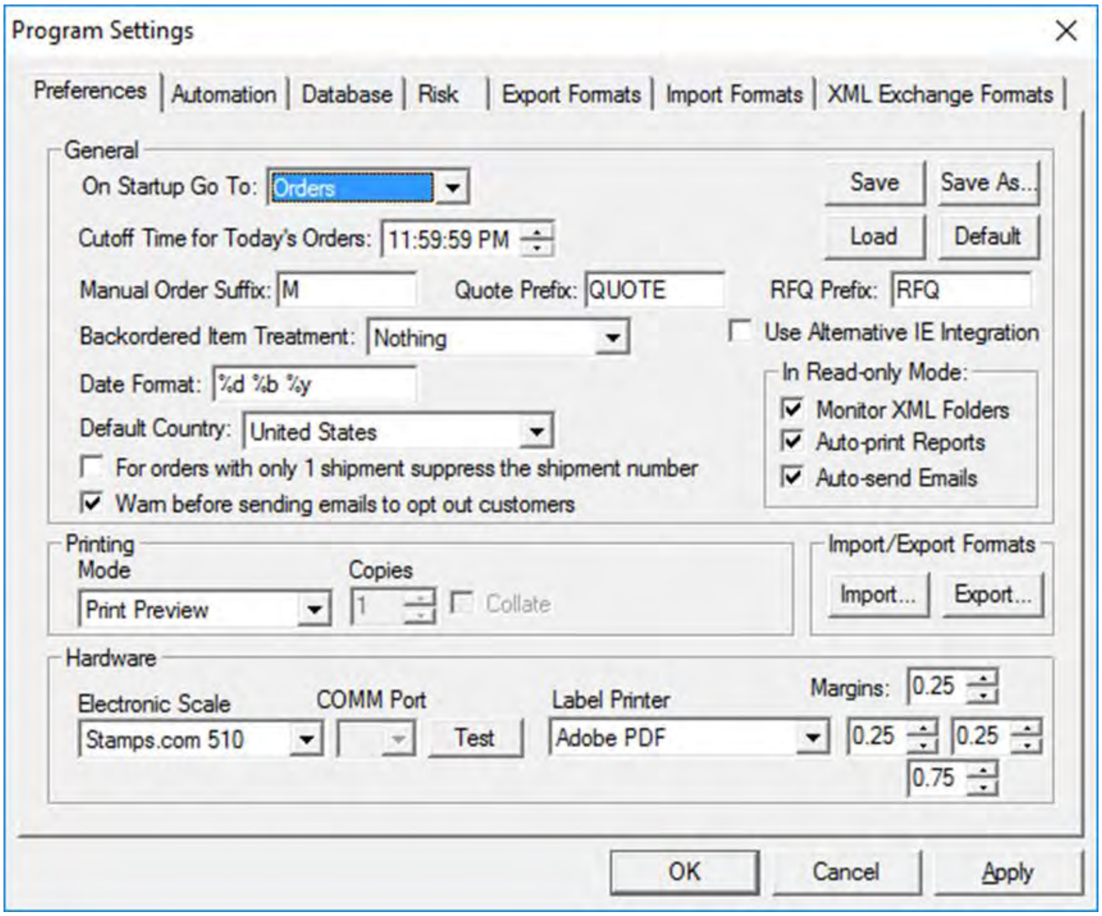
- Note that not all variables are available to summary reports. Please notify us on the user forum if additional variables are required.

The use of html-based templates makes it easy to create reports that look how you want and contain the necessary information. They also allow for greater customization using java or other script functions for displaying data only under certain conditions, changing formatting or other advanced functions. Examples of such customization are available to use as guides. Contact us at info@thesupermanager.com for more information.

7.0 Program Settings / Setup

Program settings are global settings used with The SuperManager. Unless you have used the custom program settings option found on the “Order Processing Automation” tab of the store settings (See section 6.6) the settings shown here will be the default program settings. You can, however, save a custom program settings file and set up one or more store files to use a particular set of custom settings.

7.1. Preferences



The Preferences dialog contains the following general application settings:

On Startup Go To The screen SuperManager should go to each time it is started.

Cutoff Time for Today’s Orders SuperManager offers a separate tab for displaying today’s orders. Enter in this setting the time at which one day stops and the next begins. This setting is offered to allow users to enter their close of business, for example, to quickly bring to view the orders that came in after close of business the night before.

Save SuperManager automatically saves the program settings each time you exit. For added security, however, you can save the settings at any time using this button to assure that they will be properly saved.

Save As… Same the current set of SuperManager settings to a file that you will specify in the file selection dialog that will come up after pressing the button.

Load Load a set of SuperManager settings from a file that you will specify in the file selection dialog that will come up after pressing the button

Default Restores all the program settings to their “factory default” values. This means all changes made to your settings, import or export settings you have added and xml exchange settings will be initialized to their original state.

Manual Order Suffix A suffix to be appended to all manual order numbers to differentiate them from online orders. This value must not be left blank to avoid ambiguity of order numbering.

Quote Prefix A prefix to be prepended to all quote numbers to differentiate them from executed orders. This value must not be left blank to avoid issues working with quotes.

RFQ Prefix A prefix to be prepended to all RFQs to differentiate them from POs. This must not be left blank to avoid issues working with RFQs.

Backordered Item Treatment SuperManager can handle funds due for backordered items in three ways:

- Nothing: Amounts due for backordered items will be considered due even though the items have no yet been shipped.
- Subtract from Subtotal: Amounts due for backordered items will be subtracted from the subtotal.
- Add Total Line Item: Amounts due for backordered items will be included in the subtotal. Then in a line item below the subtotal they will be subtracted out.

Date Format The format specification for all dates displayed in SuperManager. The date is defined using placeholders for different pieces of the date, which are listed in section 0.

Default Country The country that should be assumed when the country field of an address is left blank.

Suppress Shipment Number SuperManager creates a shipment ID for each shipment based on the order ID. For example the first shipment for order 1000 would have the ID 1000-1. If you would like to use the order ID alone for orders with just one shipment check this option. By default it is unchecked so that all shipments have a consistent pattern of ID.

Opt Out Email Warning Enable this option to have SuperManager warn you each time before you send an email to a customer that has requested to be opt out.

Use Alternative IE Integration On some PCs the default method SuperManager uses to grab the orders exported from Yahoo! Store and other carts in XML format fails due to conflicts with other software or other environmental particularities of the computer. If you experience error messages when SuperManager is trying to download orders, you can try enabling this option to see if it remedies the issue.

[In Read-only Mode] Monitor XML Folders Uncheck this option to disable monitoring the XML folder defined in the store settings when in read-only mode (See section 6.6 for setting up a monitored folder)

[In Read-only Mode] Auto-print Reports Uncheck this option to disable printing of reports automatically when new orders are downloaded when in read-only mode (See section 6.10 for setting up auto-printing of reports)

[In Read-only Mode] Auto-send Emails Uncheck this option to disable all automatically sent emails, including order confirmation emails, dropship emails, reorder emails (See section 6.6) and manual order shipped emails when in read-only mode (See section 6.7).

[Printing] Mode SuperManager offers the ability to have printed reports shown in a print preview window to see the report before printing it, printed using the standard windows print dialog that allows the user to select which printer to print to and number of copies, or printed directly to the default printer.

[Printing] Copies When “Print to Default Printer” is selected as the print mode you can enter a number of copies to print.

[Printing] Collate When “Print to Default Printer” is selected as the print mode you can check this option to have multiple copies collated.

Electronic Scale SuperManager offers support for electronic scales. If you use a different USB electronic scale and would like to have it considered for inclusion into SuperManager, please contact info@thesupermanager.com.

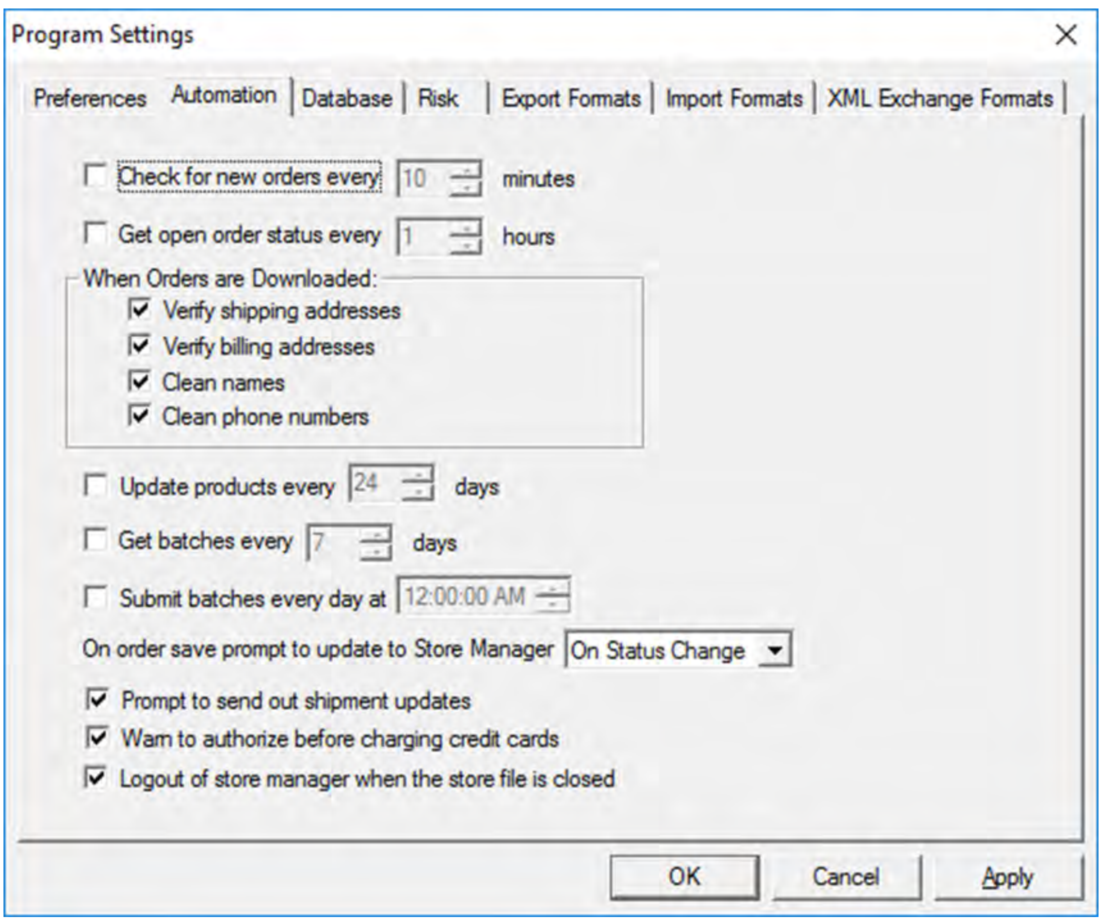
[Electronic Scale] Port Used for electronic scales that connect through a serial port. This is not required for USB scales.

Label Printer The printer that should be used for FedEx Web Services labels

[Label Printer] Margins Adjust these settings to place FedEx Web Services labels in exactly the right place for your label printer.

Import/Export SMX To facilitate the transfer of import and export formats we have created the “SMX” file type. This file gives the required information to add one or more import and/or export formats. Should you receive an SMX file from SuperWare you can import it to your settings using the import button. Should you desire to send a format to SuperWare or another user, you can do it using the export button.

7.2. Automation



The automation tab contains settings that can allow SuperManager to automatically perform certain tasks on given intervals:

Check for new orders SuperManager will automatically check for new orders on a given number of minutes interval when this option is selected. When new orders arrive it will alert you that new order(s) have been downloaded.

Get Open Order Status SuperManager will automatically get the order status for all orders in the “Open” tab of the order list on a given number of hours interval when this option is selected. This option is particularly useful when using SuperManager in connection with Amazon stores, where Amazon exports incomplete order information until the order is ready for fulfillment. By checking this option, SuperManager will keep checking the order for you.

Verify shipping address Check this option if you would like SuperManager to automatically verify shipping addresses for newly imported orders. SuperManager contacts US Postal Service databases to check the address for validity and add information as needed to complete the address.

Verify billing address Check this option if you would like SuperManager to automatically verify billing addresses for newly imported orders.

Clean names Check this option if you would like SuperManager to standardize the capitalization of the name fields for new orders.

Clean phone numbers Check this option if you would like SuperManager to standardize US and Canadian phone numbers to the (xxx) xxx-xxxx format when downloading new orders.

Update products SuperManager will download your product list automatically on a periodic basis for supported stores.

Get batches SuperManager will automatically download your merchant batches from your Amazon, Authorize.net, and Yahoo! Store accounts on a given number of days interval.

Submit batches SuperManager will automatically submit your Yahoo! Store merchant batches every day at the same time (if SuperManager is open at that time)

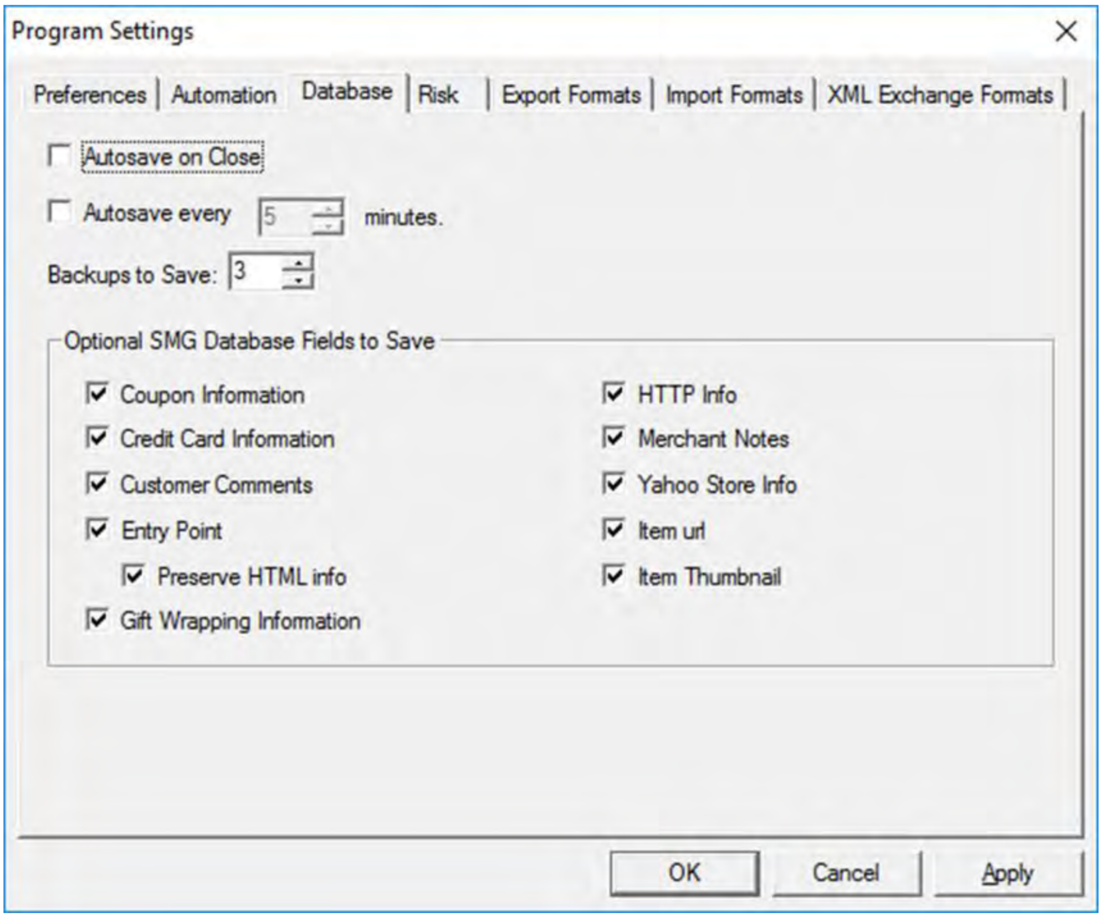
On Order Save Prompt to Update to cart In the course of managing orders in SuperManager you may make changes to an order that render it “Canceled”, “Fraud”, “On Hold”, etc… When this option is set to “On Status Change” any change made to an order that results in it having a different order status will prompt SuperManager to ask you whether it should update the order in your store manager. When it is set to “Never” it will never ask this and when set to “Always” it will ask after any change is made to the order.

Prompt to send out shipment updates Many stores accept shipment dates and/or tracking numbers for shipped orders. By keeping this option enabled, whenever a shipment is marked shipped or a tracking number is added SuperManager will ask you if you would like to upload that information to your store manager.

Warn to authorize before charging credit cards It is best industry practice to always authorize credit cards before charging them. Some users, however, prefer to not do this. Uncheck this option if you don’t want SuperManager to warn you before charging a credit card if it has not yet been authorized for the amount you are charging.

Log out of store manager when file is closed — SuperManager remains logged in to certain store managers whenever it is running in case it needs to interact with your store. Some store managers leave cookies on your computer to allow it to remember that you were signed in under a given username. This can cause problems for using SuperManager on another store that requires a different username or for logging in using a different username manually. When this option is checked SuperManager will log out when the store is closed or SuperManager is closed in order to not allow your store manager to remember the last user that was logged in.

7.3. Database



The database tab offers a few settings concerning when your database is saved and what should be saved in it:

Autosave on Close — When this option is checked SuperManager will automatically save the file each time it is closed. Otherwise it will ask you whether it should save the data or not.

Autosave — SuperManager will save your file for you on a given interval of minutes when this option is selected. Otherwise you should save your file periodically to prevent loosing data should an unexpected shutdown occur.

Backups to Save — Set this to a value greater than 0 if you want SuperManager to save a certain number of backup files.

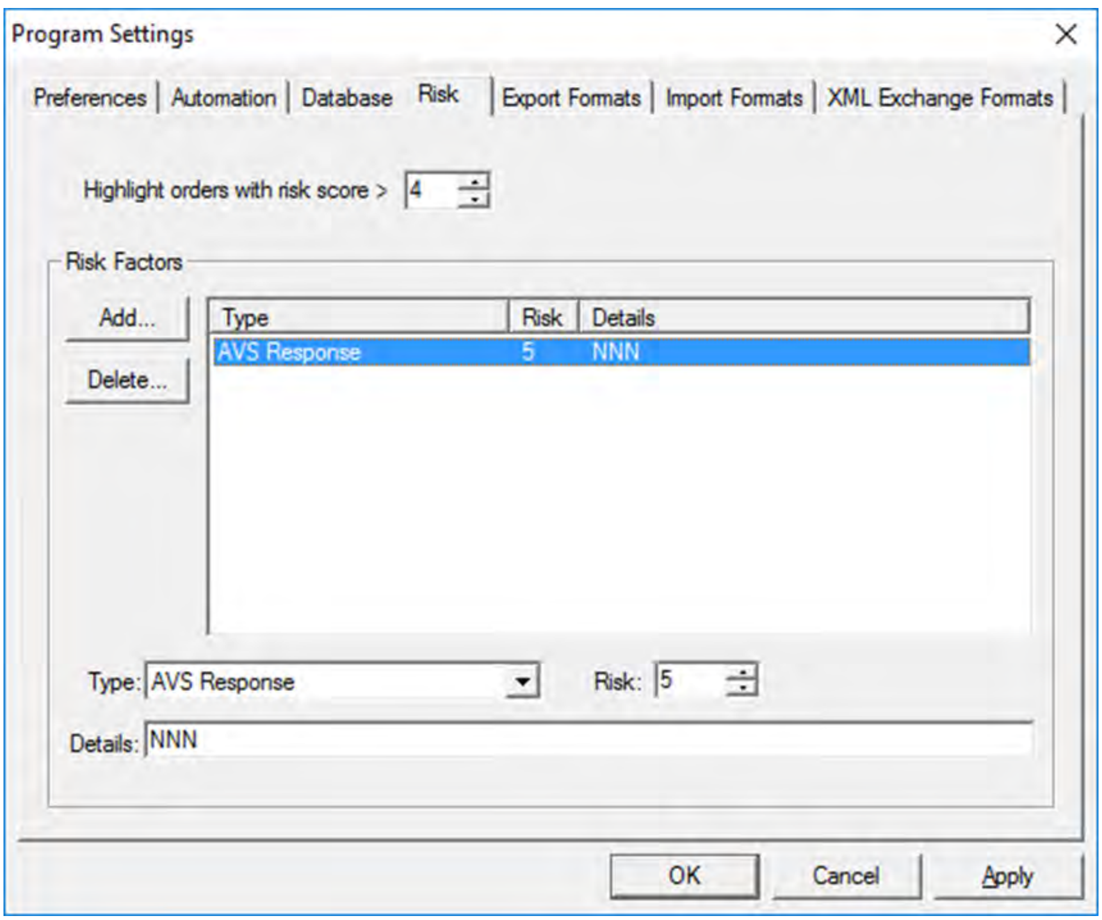
Optional fields to Save Shopping carts offers several fields which are either repetitive in nature or viewed as not important to some users. SuperManager will save all of this data unless the corresponding check mark is cleared for them. Generally it is best to keep the file size of your database to a minimum and therefore if there is data that you are not concerned about having it is recommended to remove it from the database.

7.4. Risk

SuperManager can query risk scores from either MaxMind or Subuno. It can also calculate a risk score for you based on certain rules. When you set up factors on this tab, SuperManager will calculate a risk score between 0 and 100 for each new order that is downloaded.

SuperManager can turn high risk orders red and italic on the order list to make them easy to identify.

Settings for how these scores are calculated and when orders are marked red and italic are on the tab shown below.



Highlight orders with risk score > Orders with risk scores greater than this value will be turned red and italic on the order list to make them easy to identify

Risk Factor List This is the list of all the risk factors you have set up for calculating the risk score. Use the "Add…" or "Delete…" buttons to add or delete the selected risk factor. Use the boxes below the list to modify the selected risk factor.

Type Modify the type of the selected risk factor. Currently the following types are supported

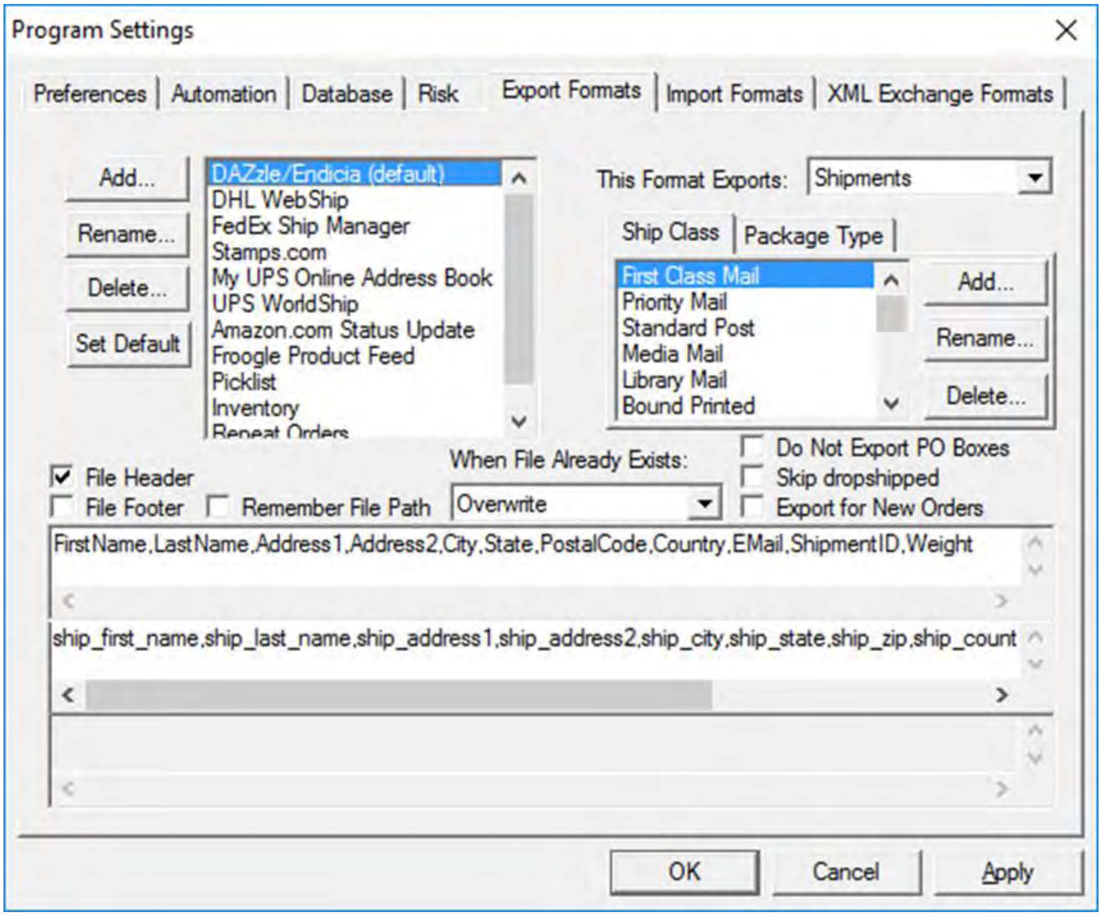
- AVS Response: The amount in the risk box will be added to the score of orders with an AVS response given in the "Details" field. You can use a comma to include multiple AVS responses in the same rule.
- Blacklist Email: The amount in the risk box will be added to the score of orders with the email address given in the "Details" field. You can use a comma to include multiple email addresses in the same rule. This can be a good way to prevent fulfillment of orders to repeat fraud offenders.
- CVV Response: The amount in the risk box will be added to the score of orders with a CVV response given in the "Details" field. You can use a comma to include multiple CVV responses in the same rule.
- Declined Charge: The amount in the risk box will be added to the score of orders with a declined credit card charge.
- PayPal Different Email: The amount in the risk box will be added to the score of orders with "PayPal" as the pay method and an email address that is different than the billing email address.
- Ship Country: The amount in the risk box will be added to the score of orders with a ship to address that is in one of the countries listed in the comma separated list in the "Details" field. Countries should be identified by their ISO 2-digit abbreviation.
- Ship To Different From Bill To: The amount in the risk box will be added to the score of orders with a ship to address that is different in any way from the bill to address.

Risk The incremental risk added to the risk score for the selected risk factor.

Details This field allows you to enter avs responses, email addresses, cvv responses and other comma separated lists depending on the type chosen for the risk factor. Some types do not need any further details. For such types, this field should be grayed out.

7.5. Export Formats

You can use export formats to export your order information to other programs such as FedEx Ship Manager, UPS OnLine WorldShip or DAZzle/Endicia, etc. Four export formats have been included as examples for you to use. You can modify these or add others using the settings described below.



Export List This list contains all the export definitions in your file. Select one of them to see the settings assigned to it. Use the “Add…”, “Rename…” and “Delete…” buttons to add a new export, rename or delete the one selected.

Set Default Assigns the selected export as the default export. The default export can be automatically exported by using Alt-E. Assign the default export to the one you will be using most often.

This Format Exports Select the type of data exported by this export format. This can be batches, orders, order items, order range, products, product variants, shipments and suppliers. Order range exports can be used as summary reports. The export values are the summed up and exported only once, where with order exports there will be one value exported for each order selected.

Ship Classes This list will be shown only for shipment exports. It contains all the ship classes available for the shipping software you are exporting to. These ship classes must be in the exact (sometimes cryptic) form required by the software package. You will then be able to map your store’s ship methods to these ship classes in the store settings. Use the “Add”, “Rename” and “Delete” buttons to work with these classes.

Package Types This list will be shown only for shipment exports. You can get to this list by clicking on the “Package Types” tab above the list. It contains all the package types available for the shipping software you are exporting to. These package types must be the exact (sometimes cryptic) form required by the software package. You will then be able to map your own custom names to these package types in the store settings. Use the “Add”, “Rename” and “Delete” buttons to work with these package types.

File Header Check this box if the export should have a header line of static text above the exported batch, order, product, shipment or supplier information. When this option is checked the box below this check will become active. Enter the file header in this box. When the “Append” option is selected, this line will only be exported the first time the file is created.

File Footer Check this box if the export should have a footer line of static text below the exported batch, order, product, shipment or supplier information. When this option is checked the box at the bottom of the screen will become active. Enter the file footer in this box. When the “Append” option is selected, this line will only be exported the first time the file is created.

Remember File Path When this option is checked you will be asked for the location to export the file only the first time, thereafter the file will be exported to the same place as previously selected. If at some point you need to change the location the file is exported to you can clear this box, export with this export once, then re-enable it if so desired.

When File Already Exists This option dictates what SuperManager does when the file selected to export to already exists. You can choose to either overwrite the existing file, append entries to the existing file or append a number to the export filename to make it a unique file.

Do Not Export to PO Boxes This option is only available for shipment exports. Certain shipping vendors do not ship to PO boxes. This option allows you to choose not to export shipments being sent to PO boxes. The shipments that are not exported will be listed after the export is complete to make you aware that they were excluded from the export.

Skip Dropshipped For order, order items or shipment exports, skip items that have been marked with dropshipped status.

Export for New Orders Check this option to have this export created for new orders downloaded into SuperManager.

Middle Box The box is for supplying the export line(s) for each item exported. It should contain one or several SuperManager variables (See section 12.1 for a complete list) you would like to export and should be formatted so that it will be compatible with the program you are exporting to. For example, you can separate the variables with only commas:

order_id, order_date

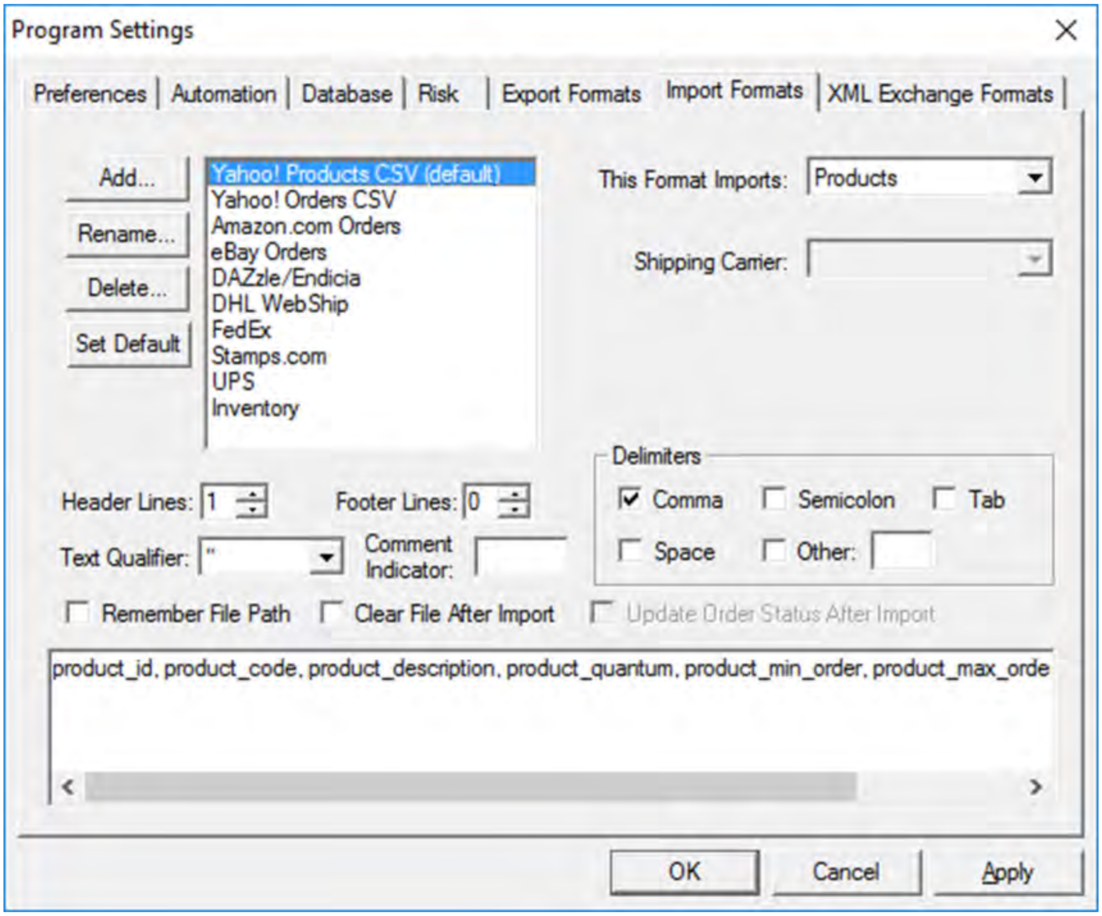
or you can separate with commas and quotation marks:

"order_id","order_date"

or any other format required by the third party software that will be reading the exported file.

7.6. Import Formats

Similarly you can define on the next tab the file formats you need SuperManager to read from third party programs.



Import List This list contains all the import definitions in your file. Select one of them to see the settings assigned to it. Use the "Add…", "Rename…" and "Delete…" buttons to add a new setting, rename or delete the one selected.

Set Default Assigns the selected import as the default export. The default import can be automatically imported by using Alt-I. Assign the default export to the one you will be using most often.

This Format Imports Select the type of data imported by this import format. This can be batches, orders, order items, products, product variants, shipments and suppliers.

Shipping Carrier This option is available only for shipment imports. When files of this import type are imported all the shipments will be set to this carrier type. If none is selected the carrier may be input via a column in the data file or will be left unchanged if it is not in the file format.

Number of header lines The number of lines at the top of the file not intended to be interpreted as object data. These lines will be ignored when the file is imported.

Number of footer lines The number of lines at the bottom of the file not intended to be interpreted as object data. These lines will be ignored when the file is imported.

Comment Indicator Enter a set of characters that would be at the begging of a line of the file that should be treated as a comment. For example, fill this box with “!” if each comment line in the file begins with “!”.

Text Qualifier The character that surrounds text strings. Many .csv formats use quotation marks as a text qualifier.

Remember Path Select this option if you will always want to import the same file name. If this is selected, the first time you import with this format a file will be requested, then subsequent times you use this import a file dialog will only appear if the remembered file path does not exist.

Clear File After Import Select this option if the third party program you are importing the file from appends to the file each time you export. Each time SuperManager reads the file it will read all the lines in the file. If a third party program just adds to the end of the file each time SuperManager will end up importing information for all the orders ever exported into this file multiple times.

Delimiters Check any Delimiters that apply. .csv files are comma delimited, thus you would select comma as the delimiter. Other formats are space, tab or semicolon delimited. The SuperManager also allows you to specify any other character as a delimiter.

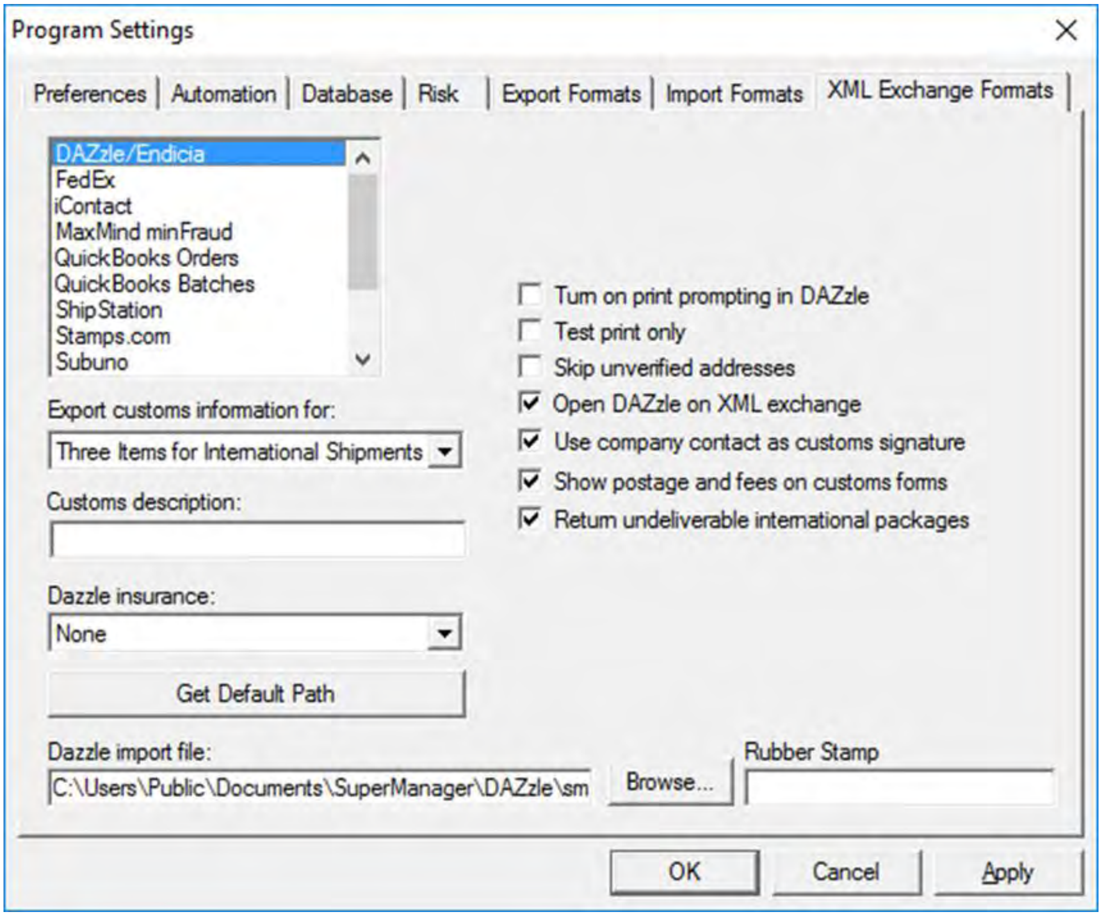
Box at the bottom Enter the repeating line of the import format. This will be a list of variables delimited by the delimiters specified. Use the variable skip_field to skip a column of the import file. Note the following nuances about the import format:

- When importing batches the variable batch_number must be included in the format.
- When importing orders if the variable order_id is not included, the next new manual order number will be assigned to the order.
- When importing order items the variable order_id must be included in the format.
- When importing shipments the variable shipment_id must be included in the format. This id includes the order number, which must be a valid order number in The SuperManager.
- When importing product variants a valid product_code must be provided.

7.7. XML Exchange Formats

XML Exchange is available with many applications to enable you to easily exchange information bi-directionally with other programs such as DAZzle/Endicia, FedEx Web Services, MaxMind, QuickBooks, QuickBooks POS, Stamps.com, Subuno, UPS Web Services and UPS WorldShip. These will be discussed in chapter 11.0 “Interfacing with Other Programs”.

7.7.a DAZzle/Endicia



Export customs information The number of items that should be identified for customs declaration forms. DAZzle only supports up to five and may crash if more are provided. Therefore it is recommended not to export more than five. Some customs forms templates work well with five items, while others are only designed for 3 items or less. You can also specify to only export item information for international orders.

Customs Description If “Use description below” is selected in the previous setting the value in this field will be exported as the customs contents

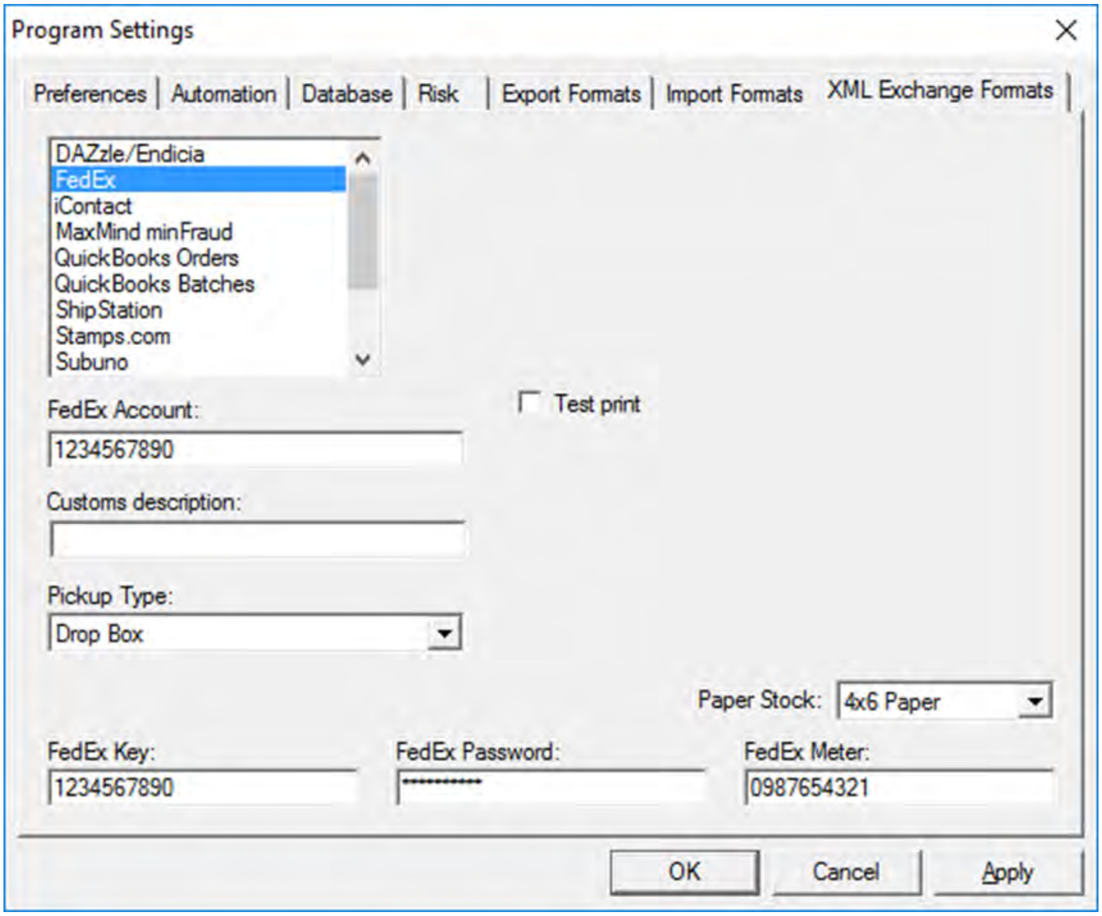
DAZzle Insurance Select the type of insurance you use in DAZzle. If “None” is selected no insurance will ever be applied in DAZzle. If one of the insurance options is selected whenever a shipment is marked as “Insured” the type of insurance you select will be added in DAZzle. Note that selecting an insured option will not automatically apply insurance to each package you ship.

Get Default Path Press this button to have SuperManager attempt to determine the path that DAZzle is monitoring for incoming XML files. For more information about this, see section 11.4.a.

Turn On Print Prompting	When this option is checked DAZzle will guide you through a step by step wizard to ship each package. When it is run in this mode, however, many of the instructions, such as template to use, package type and service type may be ignored and tracking numbers will not be returned to SuperManager. When this option is left unchecked all the packages you export will be directly printed and the tracking numbers will be sent back to SuperManager.
Test Print Only	Printing of shipping labels will be run in test mode. The resulting labels will not be usable for shipping packages.
Skip unverified addresses	Addresses that do not verify will be skipped when printing postage.
Open DAZzle on XML Exchange	When this option is checked, SuperManager will open DAZzle if it is not already open
Use Company Contact as Customs Signature	Use the name in the store profile as the signature under the customs declaration
Show Postage Fees on Customs Forms	Uncheck this option if you do not want the postage fees to appear on customs PS Form 2976-A / CP72
Return undeliverable international packages	Uncheck this option if you want PS Form 2976-A / CP72 to request undeliverable packages to be disposed of rather than returned
DAZzle Import File	The XML file SuperManager should create for processing in DAZzle. If you want to use automatic processing of packages in DAZzle this should be in the folder DAZzle is monitoring for incoming XML files. The "DAZzle Import File" is the path and filename of the file The SuperManager should write for DAZzle to read. For instructions on enabling this feature in DAZzle, see section 11.4.a.
Rubber Stamp	Data to export to a rubber stamp, which can be defined on your DAZzle layout. This can contain any company, order or shipment variables defined in section 12.1.

7.7.b FedEx

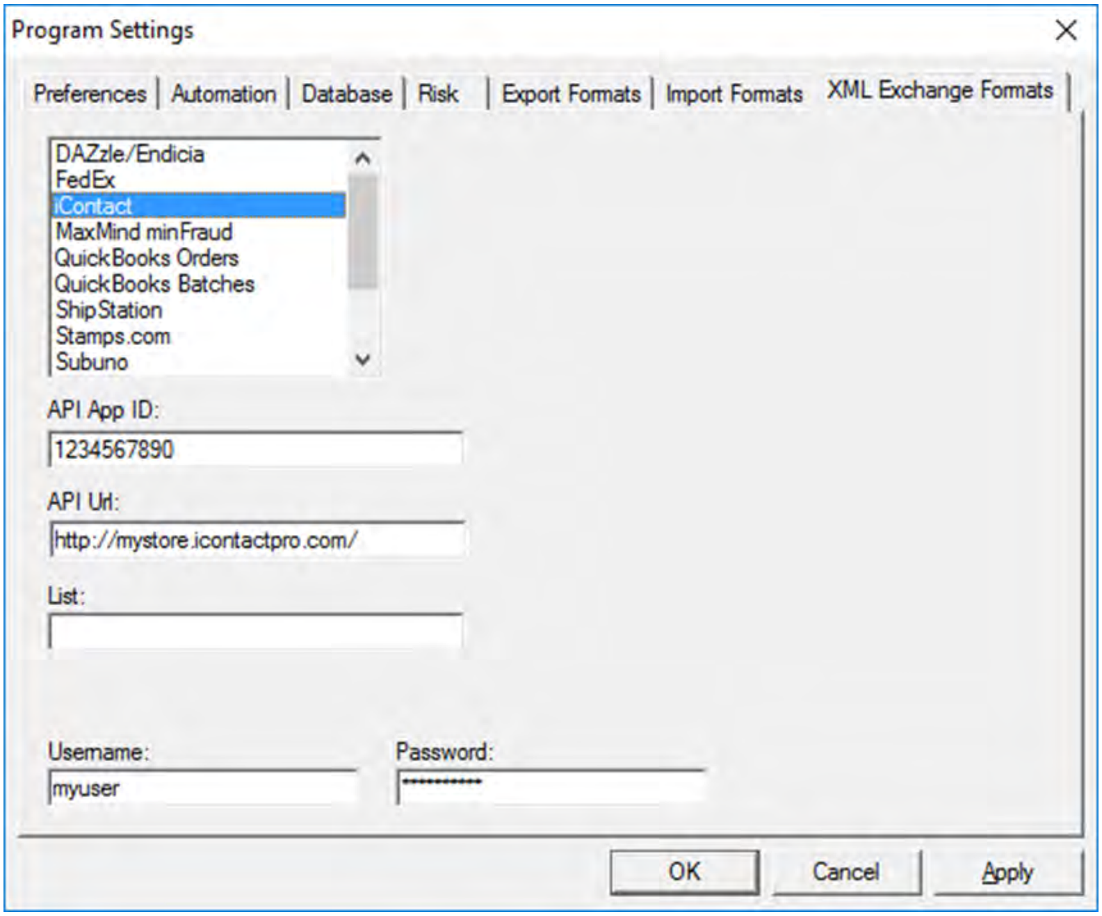
SuperManager integrates directly with FedEx Web Services to create FedEx shipments. It is necessary to obtain credentials



FedEx Account	Your FedEx account number
Customs description	The description to use for international packages on the commercial invoice
Pickup Type	The type of pickup that should be used for rate quotes and shipments
FedEx Key	This is given to you as part of your Web Services credentials. See section 11.6.a for instructions on obtaining these credentials.
FedEx Password	This is given to you as part of your Web Services credentials. See section 11.6.a for instructions on obtaining these credentials.
Test Print	When this option is selected, SuperManager will integrate with FedEx Web Service's test server. This option is used for printing verification labels required to get your credentials and for testing margins and other settings.
Paper Stock	The type of paper or labels to be printed. All the "… Paper" options will print on 8.5 x 11 paper. The "… Stock" options will print on paper the size of the label.
FedEx Meter	This is given to you as part of your Web Services credentials. See section 11.6.a for instructions on obtaining these credentials.

7.7.c iContact

SuperManager will interface with iContact and iContact Pro for creating contacts and assigning them to contact lists for sending out customer emails.



API App ID, Username and Password An application ID that you must create in your iContact account as follows:

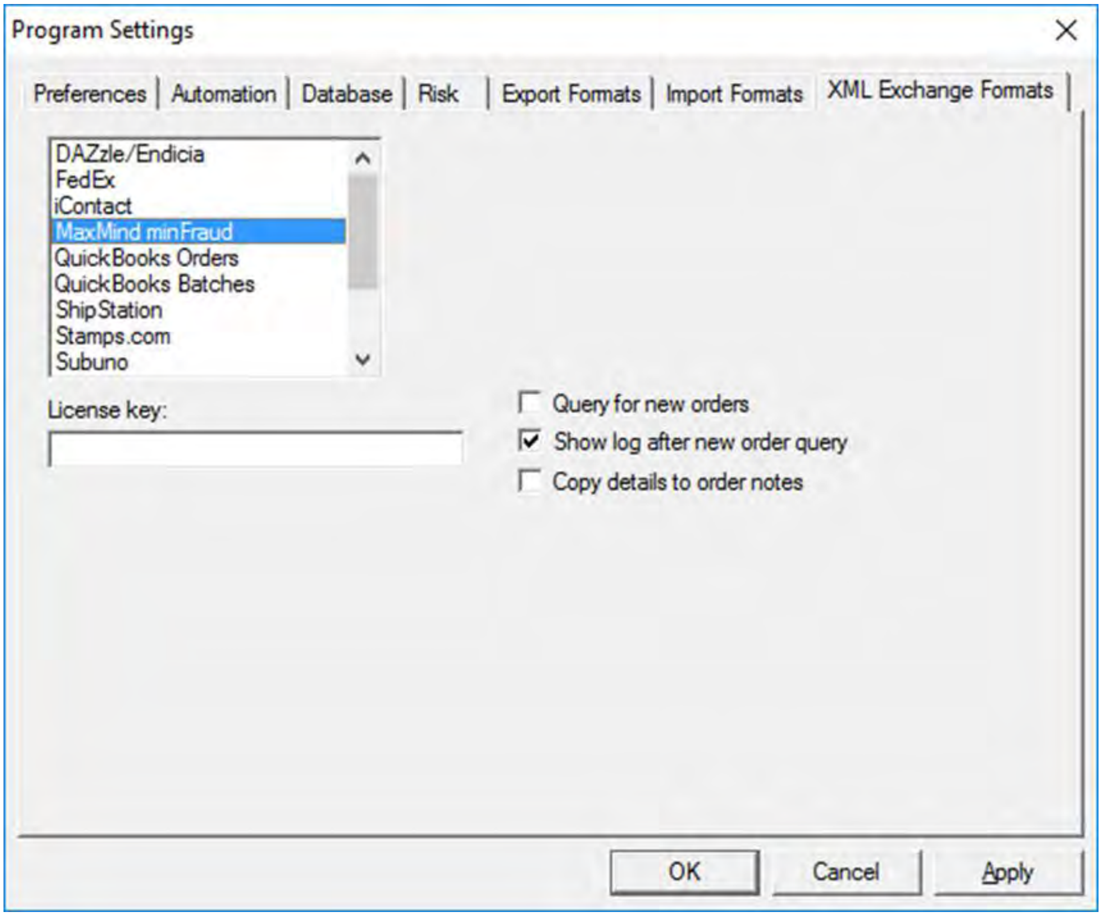
1. Login to your iContact account
2. Go to “Settings and select “API” under integrations
3. Click “Add Application” at the top
4. Add an application name and password
5. Is the Application ID, Application Name and Password in the API App ID, Username and Password settings

API Url The URL for your iContact API, which you can obtain from the iContact API settings page

List A mailing list you want SuperManager to have iContact assign to each contact uploaded to iContact

7.7.d MaxMind

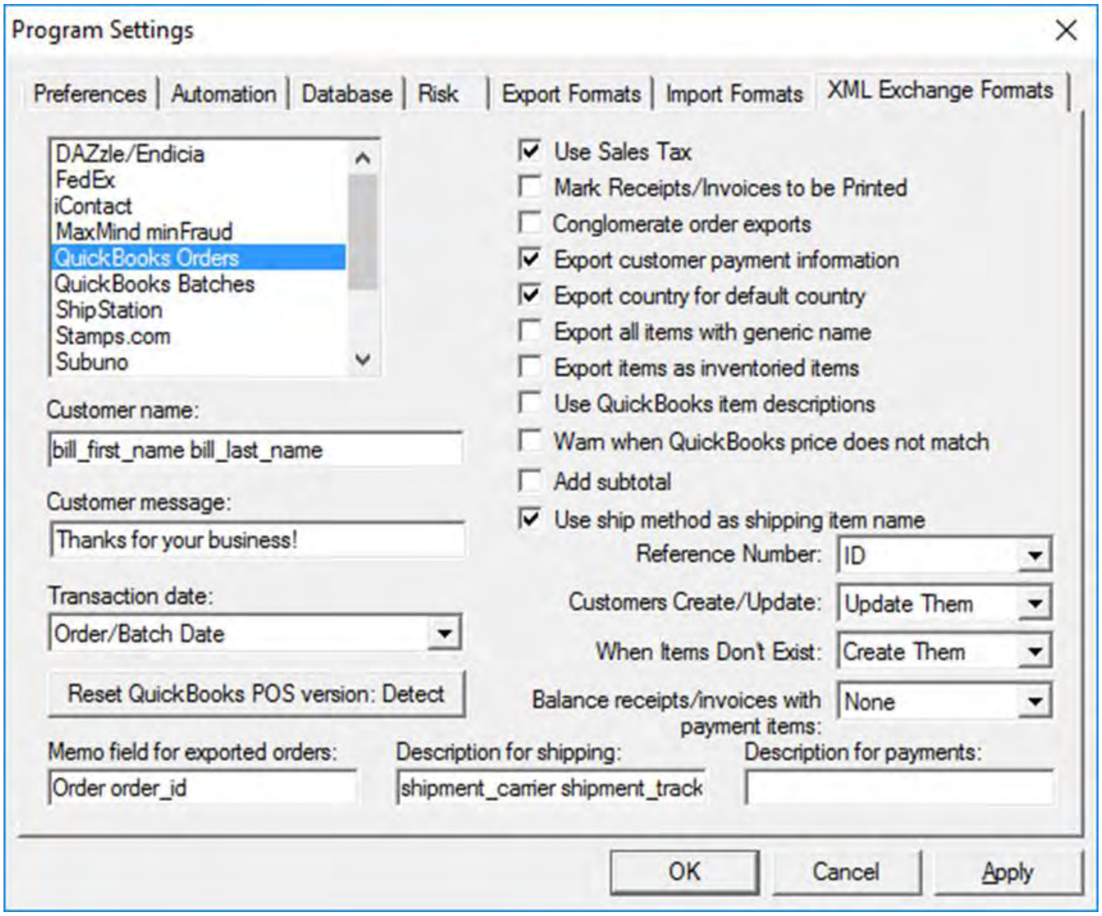
SuperManager will interface with the MaxMind min Fraud service to send order information to MaxMind and receive a risk score and recommendation on whether to process the order.



License Key	Enter your MaxMind license key here
Query for new orders	Enable this option to have SuperManager query the MaxMind information for every new order that is downloaded
Show log after new order query	When you manually query MaxMind scores for orders, SuperManager will show a log giving you any additional information about the orders queried. If you uncheck this, that log file will not be displayed when automatically querying MaxMind for new orders.
Copy details to order notes	Along with the risk score MaxMind sends descriptions and additional information to help you decide how to proceed with and order. Check this option to have this information copied to the notes for the order

7.7.e QuickBooks Orders

The QuickBooks settings are applied to both QuickBooks and QuickBooks POS, where applicable.



Customer name The customer name to be used for exporting orders. You can use any store settings or orders variables in this field. If you are exporting orders to QuickBooks POS and are syncing your order information with QuickBooks a good practice is to export orders with the pay method name as the "Customer". When you do this all the customer information is still populated in the "Ship To" fields, the customer reference is just placed with "MasterCard" for example. You can achieve this by using the variable "bill_method_account" as the customer name.

Customer message The customer message to be added to QuickBooks transactions created. You can use an store or order fields in this setting.

Transaction date The date that should be assigned to transactions imported to QuickBooks:

- **Order/Batch Date:** The date the order was received or batch was submitted.
- **Export Date:** The date the order or batch was exported from SuperManager to QuickBooks.
- **Date Funds Were Received:** The date the last charge was issued for an order. For batches it is the same as the batch date.

Use Sales Tax	If this option is enabled, SuperManager will add sales taxes as QuickBooks tax items and will assign tax codes to each item. If you prefer not to turn on Sales Taxes in your QuickBooks preferences you can disable this option
Mark Receipts/Invoices to be Printed	This option dictates whether sales receipts/invoices will be marked as “To be printed” in QuickBooks.
Conglomerate order exports	When exporting orders, export all selected orders into a single QuickBooks transaction as opposed to creating a separate transaction for each order selected.
Export customer payment information	Export customer credit card information when creating/updating customers
Export country for default country	If this is checked, addresses in the QuickBooks transactions will always contain a country. If unchecked, addresses within the default country set on the preferences tab of the program settings will not be exported with a country
Export all items with generic name	If this option is selected all items in the sales receipts and invoices The SuperManager creates will be linked to an item of name “Item”. If this option is selected and the item does not exist, The SuperManager will create it for you automatically. The descriptions and prices of the items will still appear as they do in The SuperManager. The item reference will just be made to a single item, thereby avoiding the creation of all the items from your store in your QuickBooks file.
Export items as inventoried items	If this option is selected The SuperManager will create all items in QuickBooks and/or QuickBooks POS as inventoried items. Be aware when using this setting that if you create items in QuickBooks as non-inventoried they can be changed to inventoried at a later time, however, it is not possible to change inventoried items to non-inventoried items in QuickBooks. For this reason this option defaults to exporting non-inventoried items.
Use QuickBooks item descriptions	Enable this option if you want SuperManager to use the item description already in QuickBooks for items it adds to orders. If this option is left unchecked it will assign the description to match the description in your online store
Warn when QuickBooks price does not match	This is added as an error checking mechanism. When you export orders the price in the item in the order over-rides the price in QuickBooks. When this option is selected SuperManager will give a warning that the price does not match so you will be alerted that there is a different price in QuickBooks that the item was sold for (which likely indicates a different price in your store).
Add subtotal	When checked, a subtotal line item will be added to each transaction.
Use ship method as shipping item name	Check this option to use the ship method for each order as the shipping item name. If this option is unchecked, SuperManager will use the store setting assigned for the shipping item. See section 6.9 for more information about this setting

Reference Number Choose what you want SuperManager to assign to your QuickBooks transactions for the reference number:

- **None:** No reference number is assigned. QuickBooks will assign each transaction the next available reference number.
- **ID:** Assign the reference number to be the order ID from SuperManager. Depending on the store type, this may be the order ID in your online store.
- **Alt ID:** Assign the reference number to be the alternative order ID from SuperManager. For Amazon and some other store types, this is the order ID.

Customers Create / Update Choose what you want SuperManager to do when customers by the name defined above don't exist for an order:

- **None:** Customers will be created when necessary, but address and other customer specific information will not be populated in them.
- **Create Them:** Customers will be created when necessary and populated with address and other information. However, customer information will not be updated if the customer already exists. Regardless, the address from the order being exported will always be used in the transaction. The customer record will just not be updated with the latest address and other information.
- **Update Them:** Customers will be created when necessary and populated with address and other information. If the customer already exists, this information will be updated from the order as it is being exported.
- **Prompt:** When the customer already exists, SuperManager will prompt you and ask you if you want to change the name of the new customer so as to not overwrite the existing customer.

When items don't exist Choose what you want SuperManager to do when items don't exist:

- **Skip Order**: Orders that have a QuickBooks item missing will be skipped. They will be shown in the log that comes up after exporting so you can go back and export them after creating the items yourself. Use this option if you have a special procedure, such as special income accounts to assign to QuickBooks items, and are therefore unable to allow SuperManager to create items for you.
- **Create Them**: SuperManager will automatically create items that are not yet in your QuickBooks file using the income accounts and other settings specified in the accounting export settings.
- **Match Them**: When an item is not found in QuickBooks, SuperManager will pop-up a box to allow you to type in the name of the QuickBooks item. This allows you to match items to their QuickBooks counter-parts as you go rather than matching them all upfront.

Balance receipts/invoices with payment items

Choose whether you want SuperManager to create any payment items to balance amount due from the customer in your QuickBooks transactions. Choose from among:

- **None**: No payment items will be added to the transactions
- **First**: Only the first payment event will be added
- **Payments**: Only payments will be added
- **All**: All payments and refunds will be added

Reset QuickBooks POS version

It takes a long time for QuickBooks POS to tell SuperManager what version is installed, for this reason, SuperManager remembers the version it was setup to interface with. If you upgrade QuickBooks POS you will need to check this option to tell SuperManager to find out from POS what version is now installed.

Memo field for exported orders

The memo line that should be added to each sales receipt/invoice created by The SuperManager via the orders export. This may also contain variables as demonstrated above.

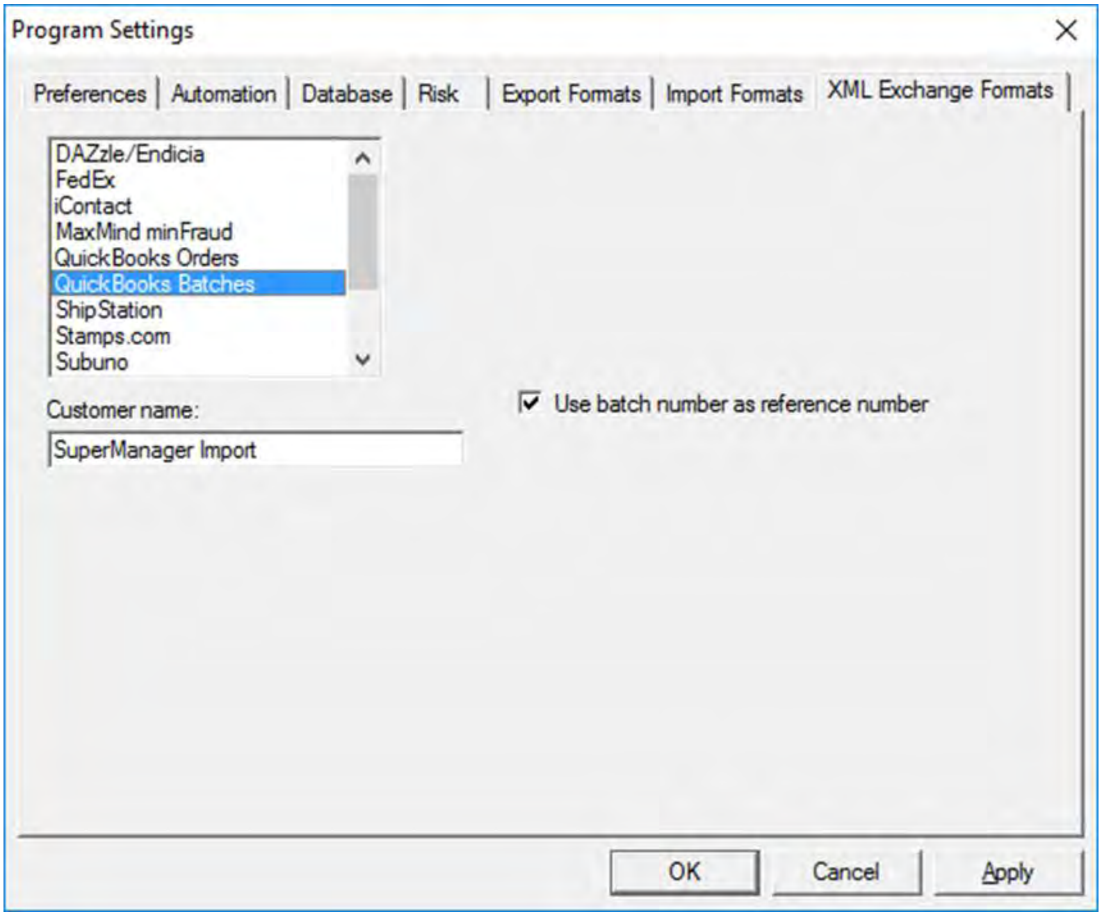
Description for Shipping

The description that should be assigned to the shipping line item in each order exported. Leave blank if you want to use QuickBooks' description. This may also contain variables as demonstrated above.

Description for Payments

The description that should be assigned to the payment line item(s) (if enabled) in each order exported. Leave blank if you want to use QuickBooks' description. This may also contain variables.

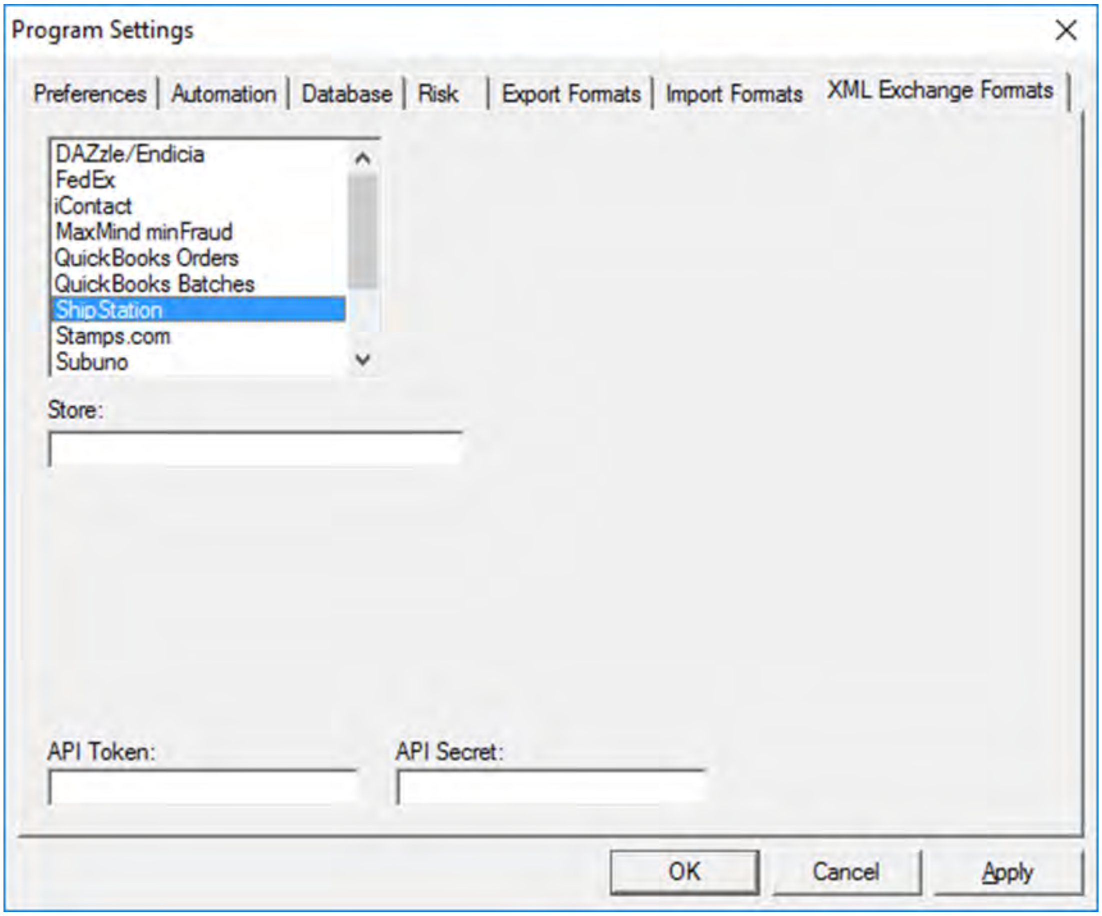
7.7.f QuickBooks Batches



Customer name There are two methods for exporting financial information to QuickBooks – batches or orders. If you are exporting batches, this is the customer name that SuperManager will use. Note that any store settings or batches variables can be used in this field. For example you could use “todays_date”, “batch_account” or any other variables as listed in section 12.1.

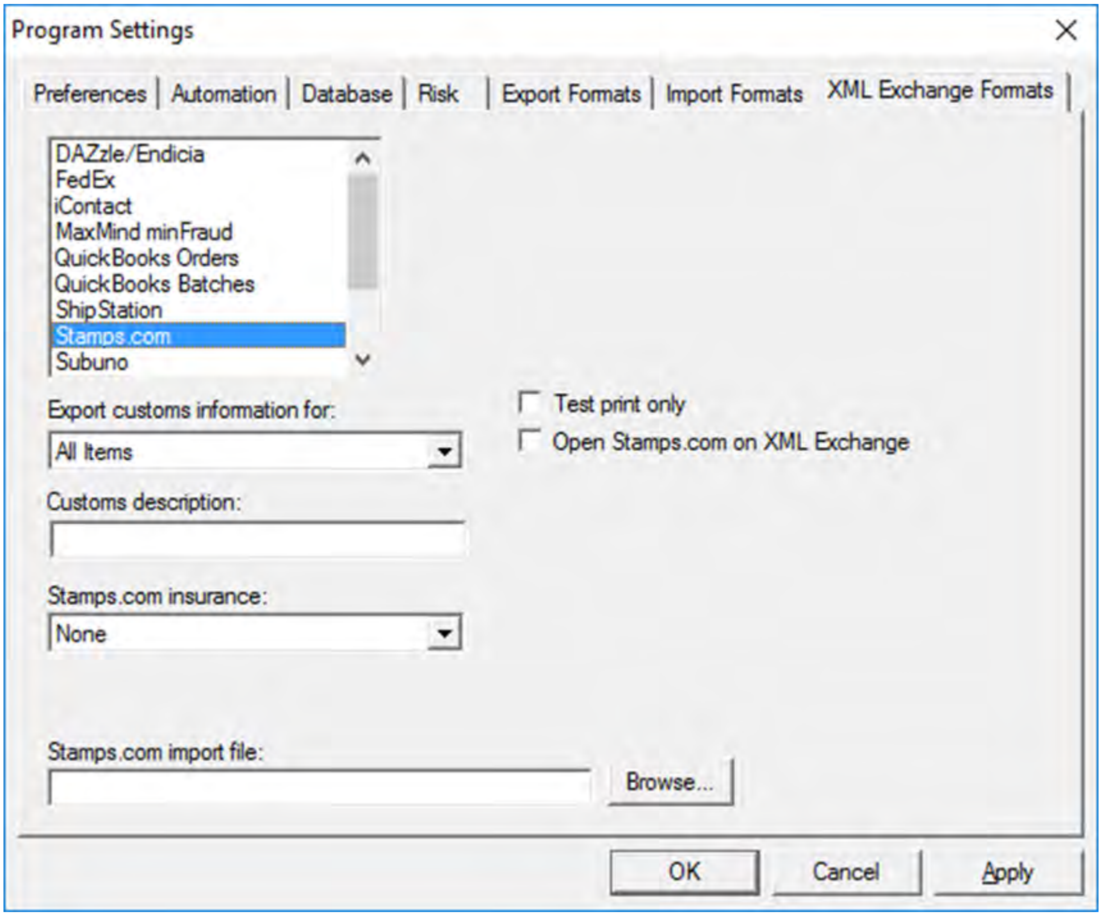
Use batch number as reference number This dictates whether the SuperManager will set the sales receipt number of the batches it exports to the batch number. If this is checked the batch numbers will appear as “Batch XXXXX”, where XXXXX is the batch number with leading zeros if applicable.

7.7.g Ship Station



Store	Leave this field blank and SuperManager will upload shipments to your default store. If you want the orders exported to a particular store, enter the store id for the store to import them into.
API Key	Obtain this from the API keys section of your Ship Station setup
API Secret	Obtain this from the API keys section of your Ship Station setup

7.7.h Stamps.com



Export customs information for The number of items that should be identified for customs declaration forms. You can also specify to only export item information for international orders.

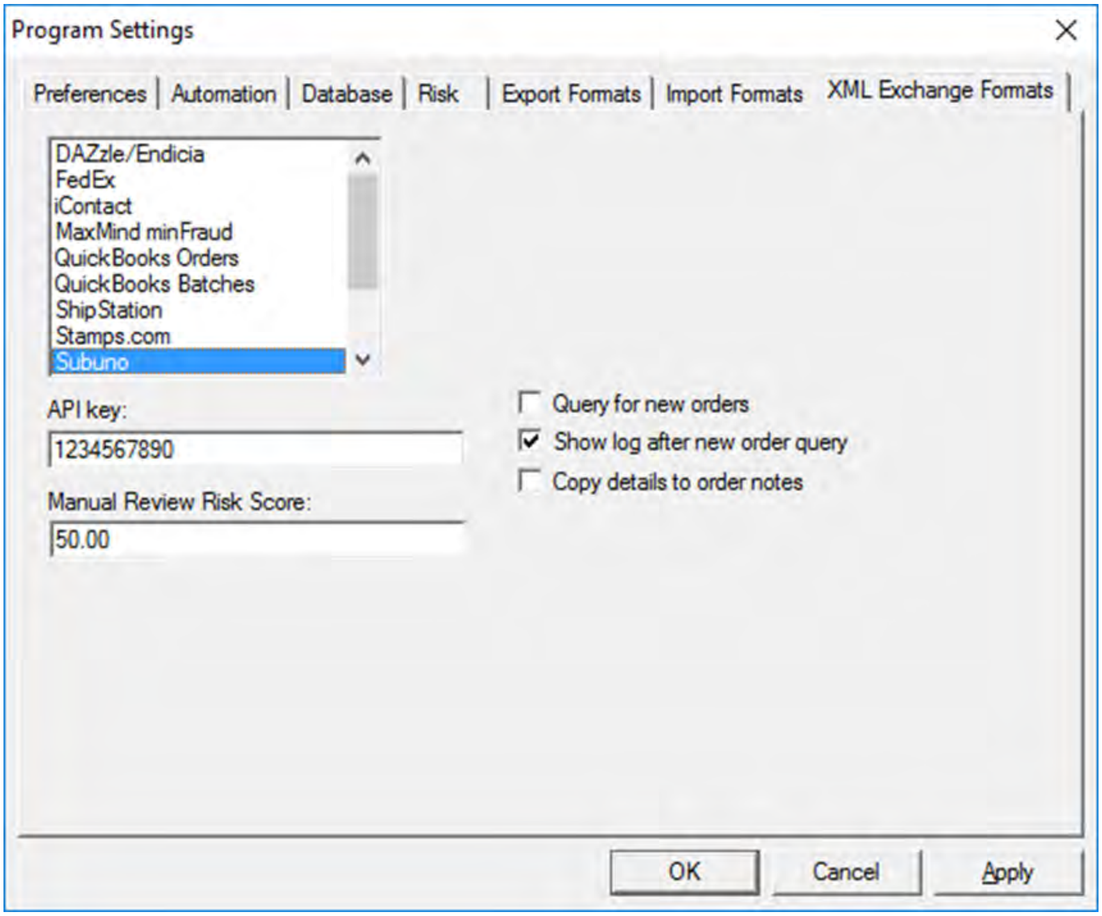
Customs Description If “Use description below” is selected in the previous setting the value in this field will be exported as the customs contents

Stamps.com Insurance Select the type of insurance you use in Stamps.com. If “None” is selected no insurance will ever be applied in Stamps.com. If one of the insurance options is selected whenever a shipment is marked as “Insured” the type of insurance you select will be added in Stamps.com. Note that selecting an insured option will not automatically apply insurance to each package you ship.

Test Print Only Printing of shipping labels will be run in test mode. The resulting labels will not be usable for shipping packages.

Open Stamps.com on XML Exchange When this option is checked, SuperManager will open Stamps.com if it is not already open

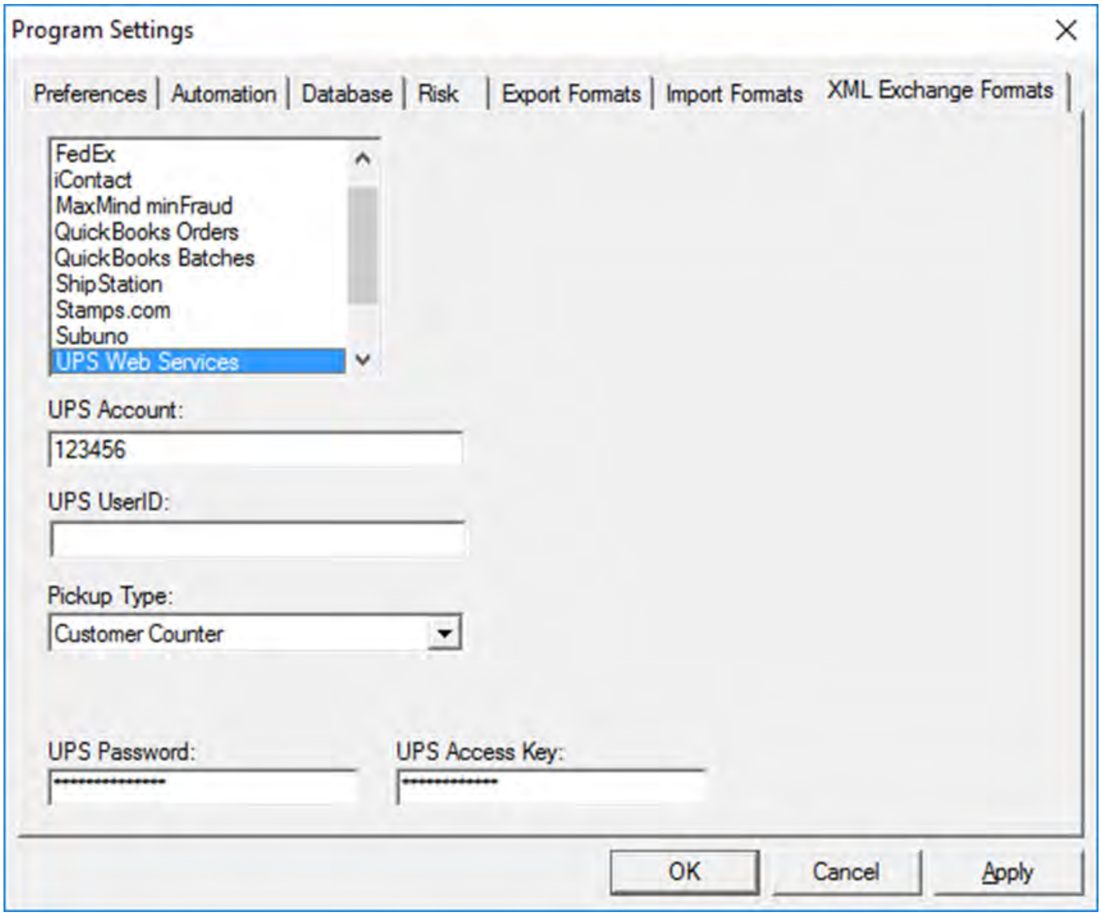
7.7.i Subuno



API Key	The API key assigned to you by Subuno
Manual Review Score	The risk score to assign to an order that receives a "Manual Review" response from Subuno. This can be used along with the risk highlight threshold set in section 7.4 to determine whether manual review orders are highlighted on the order list or not.
Query for new orders	Check this option if you want SuperManager to query Subuno for a disposition on each new order that is downloaded
Show log after new order query	When you manually query Subuno dispositions for orders, SuperManager will show a log giving you any additional information about the orders queried. If you uncheck this, that log file will not be displayed when automatically querying Subuno for new orders.
Copy details to order notes	Copy the details of the Subuno response into the notes of each order that is queried

7.7.j UPS Web Services

SuperManager integrates directly with UPS Web Services to obtain rate quotes. Currently creating shipments or other functions of UPS Web Services is not supported. The following settings are required to perform rate quotes.



UPS Account The account number that should be debited for the shipping costs of exported shipments.

UPS UserID The user ID you use to sign in at www.ups.com

Pickup Type The type of pickup that should be assumed when querying shipment rates

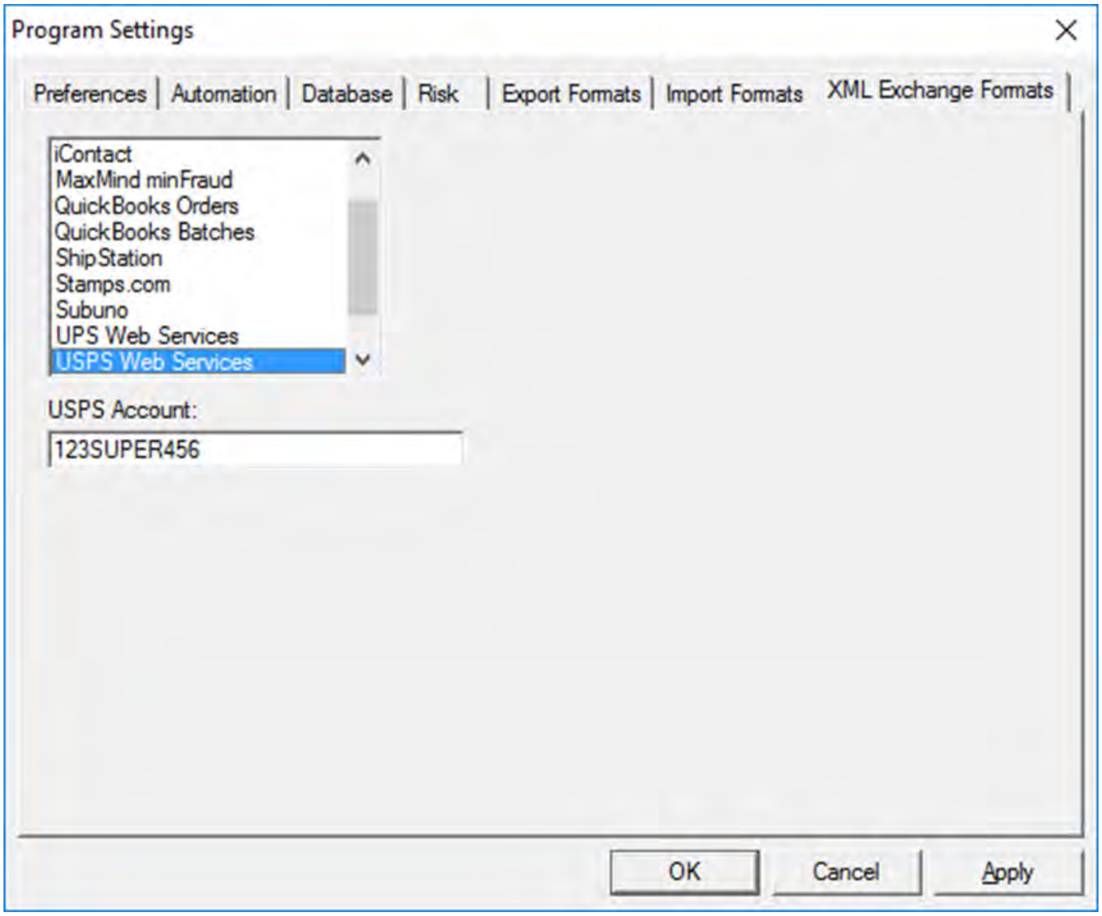
UPS Password The user password you use to sign in at www.ups.com

UPS Access Key Before interfacing with UPS Web Services for querying shipping rates, it is necessary to obtain Web Services credentials using these simple steps:

1. Go to www.ups.com
2. Login to your UPS account
3. Click here to request an access key: https://www.ups.com/upsdeveloperkit?loc=en_US#

7.7.k USPS Web Services

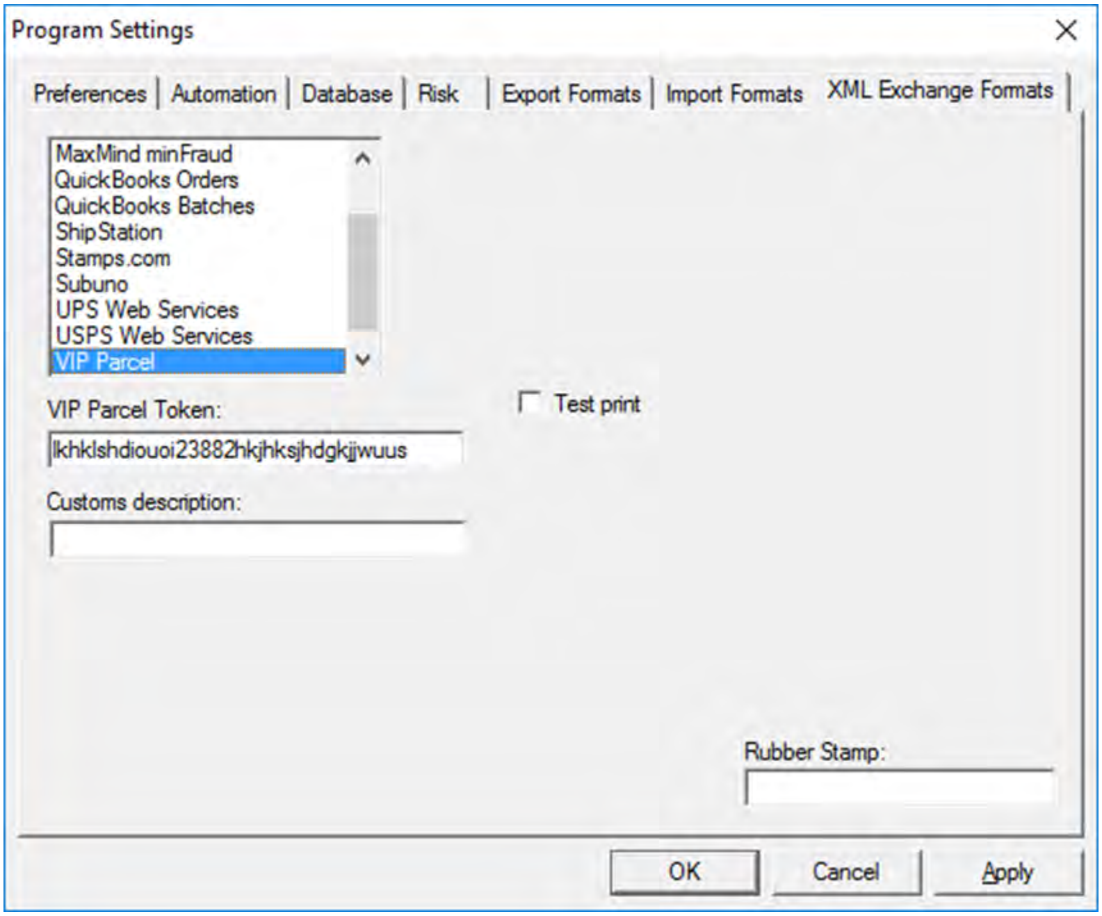
SuperManager integrates directly with UPS Web Services to obtain rate quotes. Currently creating shipments or other functions of UPS Web Services is not supported. The following settings are required to perform rate quotes.



USPS Account Your USPS Web Services account, which you can apply for using the following steps:

1. Go to https://www.usps.com/business/web-tools-apis/welcome.htm or click the “Resources for developers” link at the bottom of usps.com
2. Click the “Register Now” button
3. Fill in and submit the application for a web services account
4. The account number will be emailed to you within a few minutes of your submitting the request. Enter the account number here.

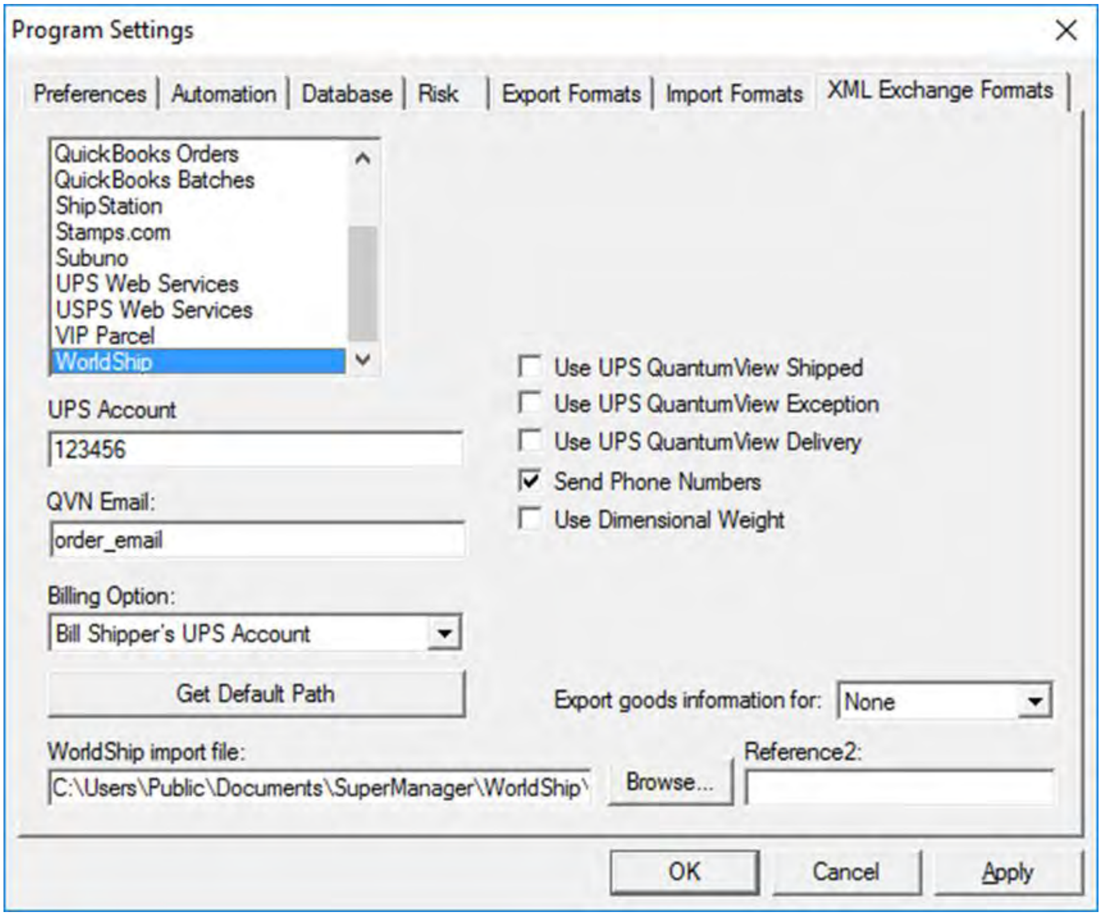
7.7.I VIP Parcel



VIP Parcel Token	Leave blank when exporting to VIP Parcel for the first time. SuperManager will authenticate to your VIP Parcel account. This will require logging into your VIP Parcel store when prompted.
Customs Description	A description to use for customs documents for international shipments
Rubber Stamp	Text to be placed on each VIP parcel postage label
Test Print	Enable this if you do not want to print live postage. Otherwise, leave this setting unchecked.

7.7.m WorldShip

As of WorldShip 9.0 XML is available for direct printing of UPS packaging labels. The following settings dictate how this XML is created.



UPS Account The account number that should be debited for the shipping costs of exported shipments.

QVN Email The email address to use for sending Quantum View emails. Typically you will want them to go to your customer, so you would leave this option as "order_email"

Billing Option The UPS Billing option to be used.

Use UPS Quantum View Enable Quantum View, which sends emails to shipment recipients to inform them of a package that is on its way. Note that there are multiple ways to inform customers of order/shipment status. WorldShip and DAZzle both offer this, as well as Yahoo, and SuperManager itself. You will probably want to assure that only one of these options is used to avoid sending duplicate information to customers concerning order status.

Send Phone Numbers Phone numbers are recommended, but not required for shipping packages. Disable this option to leave them out of WorldShip exports

Use Dimensional Weight	Enable this option if you want to use dimensional weight to price your shipments.
Export goods information for	Choose whether to export goods information for no shipments, international shipments or all shipments.
WorldShip Import File	The path and filename to export the shipment information to. This should likely be in the folder that WorldShip is monitoring for incoming XML files.
Reference2	Data to be passed to WorldShip as reference2. This can contain any company, order or shipment variables defined in section 12.1.

8.0 Order Management

All order management tasks in SuperManager are done while on the orders screen. To get to this screen choose “View” from SuperManager’s main menu and then “Orders”. This will bring you to the screen shown in section 5.2. All of the different tasks available in this screen will be discussed in this section.

8.1. Downloading Orders

Orders can be downloaded using one of two available functions. If you are downloading orders for the first time or you want to check if there are any new orders after the ones already in your database, you can press the “Get New Orders” button.

When you click the “Get New Orders” button, SuperManager will download new orders for all the stores defined in your store settings for which you have the “Include in” “Get new orders” option checked. If you want to download a specific range of orders you can use the "Actions", "Get Orders…" button. If you want to download orders just for one specific store, you can press the down arrow next to the “Get New Orders” button and choose one particular store.

When you download orders for the first time, you may be prompted whether you would like to download your product list. It is recommended to download your product database before downloading any orders (See section 9.0, Products). The SuperManager may then ask you which orders you would like to download. The amount of time it takes to download orders varies from one store platform to another. Generally it is manageable to download up to 5000 orders at one time. You can download more than this, however, recognize that it will take a bit of time. Further, it is generally recommended to keep less than 50,000 orders in your primary database at one time. You can keep more orders than this in your file at once, however, certain functions such as searching for orders or loading and saving the file will take more time. Additionally, it will use a bit of memory on your computer.

You can also import an XML file of orders by choosing “File”, “Import”, “Orders”, “Orders XML” from the menu. This option may be used to import orders that were saved in XML format from the Yahoo! Store manager or in SuperManager.

8.2. Importing Orders

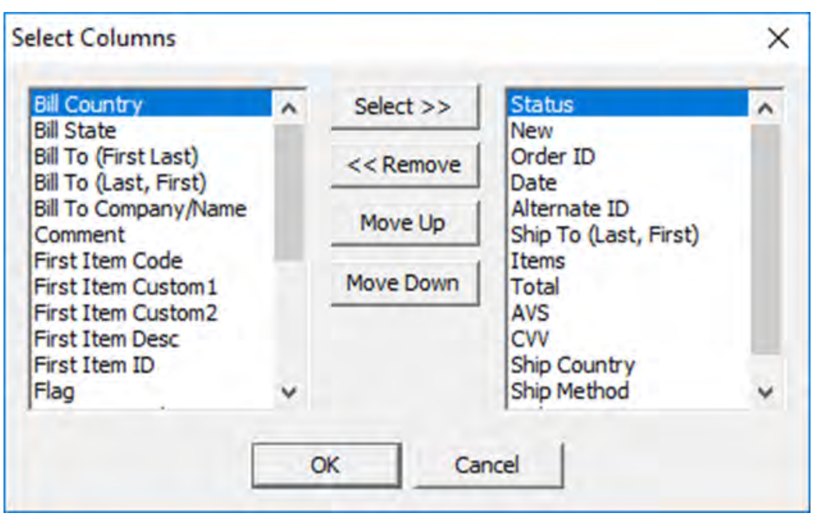
Several formats of orders can also be imported manually from text or XML files. The following import formats are available under “File”, “Import”, “Orders”:

Orders XML	Yahoo Store’s Order XML format, which is also adopted as the native XML format for SuperManager You can export orders in this format from Yahoo Store or from SuperManager.
Amazon Report Orders	Amazon Seller Central’s report of orders over a given period Using this function, SuperManager will import the orders as individual orders.
Amazon Report	Amazon Seller Central’s report of orders over a given period Using this function, SuperManager will import the orders as one combined order containing all items and totals for the orders combined.
Amazon Settlement	Amazon Seller Central’s report of each settlement that Amazon makes on your account Export this report in Seller Central by going to “Reports”, then “Payments” and then selecting to export the desired settlement report in the “Flat File V2” format.

Americart TXT	Legacy Americart's order manager template order format Americart has been absorbed into Americommerce and orders can likely no longer be downloaded in this format, however, this option is offered to be able to import orders exported from Americart.
eBay CSV	eBay's comma separated values format for exporting orders using selling manager Obtain this type of export of your orders by going in eBay to "My eBay" and installing either Selling Manager OR Selling Manager Pro. Once you have this, the method for download is detailed on this ebay Page http://pages.ebay.com/help/sell/download-sales.html. For the "Listings and records" dropdown, choose "Sold". For the date, choose whatever date range you want to import. After creating the export, you'll have to wait a few minutes for eBay's server to process the request. When it is done, eBay will send you an email letting you know your file is ready to download. Click the link in that email and download the resulting report.
GrabCart CSV	GrabCart's native comma separated values format
New Egg XML	NewEgg's native XML format for orders
ShopSite XML	ShopSite's native XML format for orders
Staples TXT	Staples's native text format for orders
Volusion XML	Volusion's native XML format for orders
Walmart TXT	Staples's native text format for orders

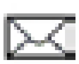
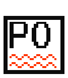
8.3. The Order List

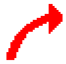
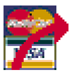
The main order list gives a lot of information about your orders. The status icons (See section 8.3.a) next to the order numbers in the Order List give an indication of the order status. A "*" may appear to some or all of the orders on your list. This means that they have not been viewed in the order details dialog or edited in any way since having been downloaded from your online store. You can also customize the information shown on the order list by choosing "View", "Customize Columns…" from the main menu.



8.3.a Order Status

SuperManager has several built-in order statuses for classifying the status of your orders. Some of these statuses are automatically enforced and others are must be user applied and will not be changed by SuperManager. The following table explains what each order status icon is and how SuperManager will enforce this status (if applicable).

Icon	Status	Meaning	Enforced
	Quote	Specifies that this order has not yet been agreed to by the customer. You can use this for sending preliminary estimates or formal quotes to customers	Not enforced. You can assign this status and SuperManager will not change it.
	Open	Specifies an order as open or working, initial status for all orders	Must not meet the conditions of Charged, Paid, Shipped, Charged and Shipping, Paid and Shipped or Backordered status
	Pending Review	Specifies that the order has not yet been reviewed	Not enforced. You can assign this status and SuperManager will not change it.
	On Hold	Indicates that the order is waiting for something before being able to process it	Not enforced. You can assign this status and SuperManager will not change it.
	Suspect	Specifies that an order has been marked Suspect	Not enforced. You can assign this status and SuperManager will not change it.
	Charged	Specifies that an order credit card has been charged	Must be payment events of “Charged” type totaling the amount due for the order. See section 8.5.e for how to add or modify payments received.
	Paid	Specifies that a PayPal, Cash, Check, etc payment has been received	Must be payment events of “Paid” or “PayPal Payment” type totaling the amount due for the order. See section 8.5.e for how to add or modify payments received.
	Shipped	Specifies that an order has been marked Shipped or a tracking ID has been added	Must have all shipments marked as shipped. See section 8.5.d for information on working with shipments.
	Charged and Shipped	Specifies that an order has been marked Charged and Shipped	Must meet the conditions of both the Charged and the Shipped statuses above.
	Paid and Shipped	Specifies that an order has been marked Paid and Shipped	Must meet the conditions of both the Paid and the Shipped statuses above
	Backordered	Specifies that an order is on Backorder	Must have one or more items marked backordered. See section 8.5.c for more information about working with items.
	On Order	Specifies that an order is backordered, but that the item has been ordered from the supplier	Must have one or more items marked on order, which means the item must appear on a PO and the item is linked to that PO. See section 8.5.c for more information about working with items.

	Sent to Dropshipper	Specifies that one or more items have been sent to the dropshipper for processing and the order has not yet been charged or paid by the customer	SuperManager will set orders to this status when it sends automatic dropship emails, but you can also change an order to this status.
	Charged and Sent to Dropshipper	Specifies that one or more items have been sent to the dropshipper for processing and the order has been charged	Must meet the conditions of being Charged as shown above.
	Paid and Sent to Dropshipper	Specifies that one or more items have been sent to the dropshipper for processing and the order has been paid	Must meet the conditions of being Paid as shown above.
	Fraud	Specifies that an order has been marked fraud	Not enforced. You can assign this status and SuperManager will not change it.
	Cancelled	Specifies that an order has been cancelled	Not enforced. You can assign this status and SuperManager will not change it.
	Closed	Specifies that an order has been marked closed	Not enforced. You can assign this status and SuperManager will not change it.
	Return Pending	Specifies that one or more returns has been added to the order, but that one or more of them is not yet marked received	Must have one or more returns that have not yet been received.
	Returned	Specifies that one or more items in the order have been returned	Must have one or more items marked as returned. See section 8.5.c for more information about working with items.

8.3.b Order List Tabs

The order list is organized into tabs to make it easier to focus on a specific set of orders you are working on. The following table describes what each of these tabs contains:

Tab	Contents
Today	Shows orders from today. You can adjust when today ends and tomorrow begins by changing the “Cutoff Time for Today’s Orders” in the program settings (see section 7.1)
Open	Shows orders that do not meet the criteria set up in section 6.6
Closed	Shows orders that meet the criteria set up in section 6.6
Manual	Shows all order created in The SuperManager, rather than being downloaded from an online store
All	Shows all orders
Quotes	Shows all manual orders that have the “quote” status, indicating that they are not yet an executed order
SuperFilter	Gives you the chance to filter your orders by specific criteria
Find	Shows the results of your most recent SuperFind (if applicable)

Use “SuperFind” to find orders by name, words in the address, credit card number, items or other fields. Enter the word(s) to search for a click “SuperFind”. The order list will automatically switch to the “Find” tab and will display all the orders returned by your search. When you search for multiple words an AND search is performed.

When you click on the “SuperFilter” tab another set of selection boxes appears. In the first one define what field to filter your orders over. Once you select a filter means to enter the filtering criteria will show up. For example if you filter by date, two date pickers will appear to choose the starting and ending date to filter to. If you filter by Pay Method a dropdown menu will appear in which you can select the payment method to filter to. When you filter by Ship to or Bill to state an edit box will appear in which you can enter the state to filter to. The state can be entered as the complete state name or the postal two character code. After entering the details of your filter click “Go!” to perform the filter. You can filter over multiple fields by selecting a second filter and clicking “Go!” then choosing “From Current List” on the drop-down box that will appear. Similarly, you can use an “Unselect” subsequent filter to remove orders meeting the chosen criteria from the existing filtered list.

8.3.c Functions Available from the Order List

By right-clicking in the Order List you will have a wide range of functions to use to manage your orders.

Open Opens the order details screen to view all the order information stored in The SuperManager.

New Creates a new (offline) order

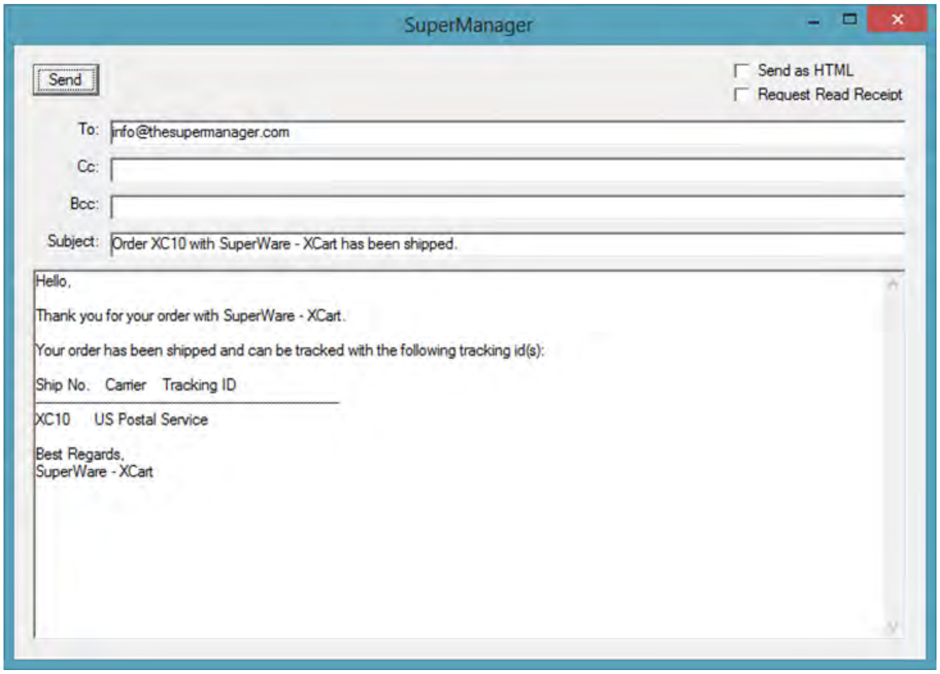
Delete Deletes the selected order(s) after prompting for confirmation

Charge Charges the order for the selected order(s) by the total amount due for the order. When using with Yahoo! Store, this is equivalent to charging the order by clicking the “Sale” button on the view order page of the Yahoo! store manager. This means if the credit card number has been changed, but not uploaded to Yahoo! Store, this process will still use the old card number.

Refund and Cancel Refunds any payments and cancels the order. Currently this function is only offered for Yahoo! Store

	Purchase Backordered Items	Takes all the backordered items for the selected order(s) and creates one PO to each supplier marked as supplying at least one of those items so that all necessary items are purchased to fulfill the orders. The order statuses are then set to “On Order” status and linked to the POs created.
	Print Report	Prints or previews the selected order(s) invoice using the default invoice, range, summary or packing slip template or one of the other templates defined. See section 6.10 for more details.
Shipments	**Verify Addresses**	Runs address verification on the shipping address for the selected orders(s).
	Set Ship Method	Changes the ship method for the selected order(s) to the ship method chosen.
	Set Package Type	Changes the package type for the selected orders(s) to the package type chosen.
	Enter Weights	Cycles through the shipments of the order(s) selected opening the shipment details screen with the order weight selected allowing you to update the weight for each one by typing it in or using an electronic scale. See section 6.6 for weight calculation settings and section 7.1 for information about setting up an electronic scale.
	Insured	Changes the ensured setting for the selected order(s). This can either toggle all the selected order(s) to insured or not ensured depending on whether you answer “Yes” or “No” when prompted.
	Enter Tracking IDs	Cycles through the shipments of the order(s) selected allowing you to update the carrier and tracking information for each one.
	Track Shipments	Opens the web browser to the link specified by the tracking link for the carrier of each order selected. For instructions on how to set this tracking link, see section 6.8.e.
	Update Shipment Status	Sends the shipment status for the selected order(s) to your shopping cart.
	Update from Store Manager	Downloads changes made to the selected order(s) outside of the SuperManager from your online store. Note that the changes do not include shipping information, manual transactions and status and other items only available in SuperManager.
	Get Order Status from Store Manager	This function is only available for Yahoo! Store. Downloads the status for the selected order(s) as set in Yahoo! Store and the shipping information available in the Yahoo! Store manager.
	Update to Store Manager	Updates the selected order(s) to your online store manager with any changes made in The SuperManager.
	Status	Change the status of the selected orders to the status selected from the submenu.

Send Email When you roll over this item a submenu will appear containing the “Blank” and all the email templates you have set up as explained in section 6.4. When you select “Blank” an email will be created and addressed in your default email client for each of the selected order(s). When you select a template name an email will be generated for each of the selected order(s). According to your store settings template emails will either be loading into a dialog for you to further edit or automatically sent.



Export When you roll over this item a submenu will appear containing a few standard formats exported by The SuperManager and all the custom export formats you have created according to section 7.2. When you select a format the selected order(s) will be exported in this format.

XML Exchange Brings up a submenu of programs currently supported for automatic interchange with The SuperManager followed by a list of your Ftp connections defined in section 6.6. Currently DAZzle/Endicia, QuickBooks and QuickBooks POS are supported.

Select/Deselect All Selects all orders in the current list.

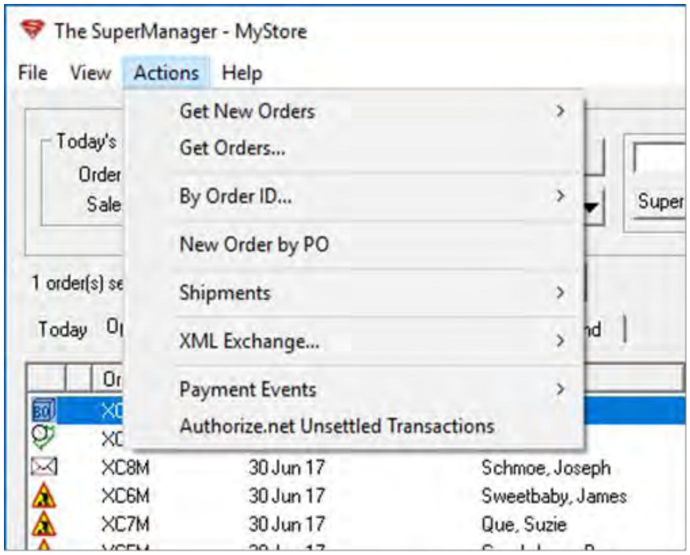
Mark Read/Unread Toggles whether a “*” is shown next to the select order(s).

8.4. Other Functions Available from the Orders Screen

When you click “Open Store Manager” an internet explorer window will be opened that is already logged into your online store manager. You can click “New Order” to create a new offline order and open the order details screen to enter the order information.

8.4.a The Order Actions Menu

By choosing “Actions” from the main menu other functions are available



Get New Orders Runs the same function as when you click the button on the dialog.

Get Orders… Allows you to specify a range of orders to download as discussed above.

By Order ID Allows you to enter order IDs one after another for orders you need to work with and then either move those orders to their own tab on the order list and select them, enter weights or enter tracking IDs. These functions can be used in concert with a bar code scanner so you can scan the orders rather than typing them in. You can also copy a list of orders from a spreadsheet and paste them into the box.

New Order by PO Allows you to enter a new order using the order number you specify in the popup that comes up after selecting this option. It checks for an order by that order number and creates it if it is not already used.

Shipments Runs the same functions for the selected order(s) as when you choose Shipments functions from the order list popup menu.

XML Exchange Runs the same functions for the selected order(s) as when you choose XML Exchange from the order list popup menu.

Payment Events

Unbatched Events Report Displays a list of payments that have not yet been marked batched. Payment events can be marked batched when merchant batches containing those payments are downloaded or by marking them manually. See section 10.0 for information about downloading batches and section 8.5.e for how to manually mark payments as batched.

Scan for Batched When batches are downloaded, SuperManager will automatically try to link each transaction in the batches to your orders and mark any payment events that are linked as batched. If a transaction in a batch is for an order that has not yet been downloaded into SuperManager the payment will not end up getting marked batched. One way to avoid this is by always downloading new orders before getting batches. This function, however, will try to correct such problems.

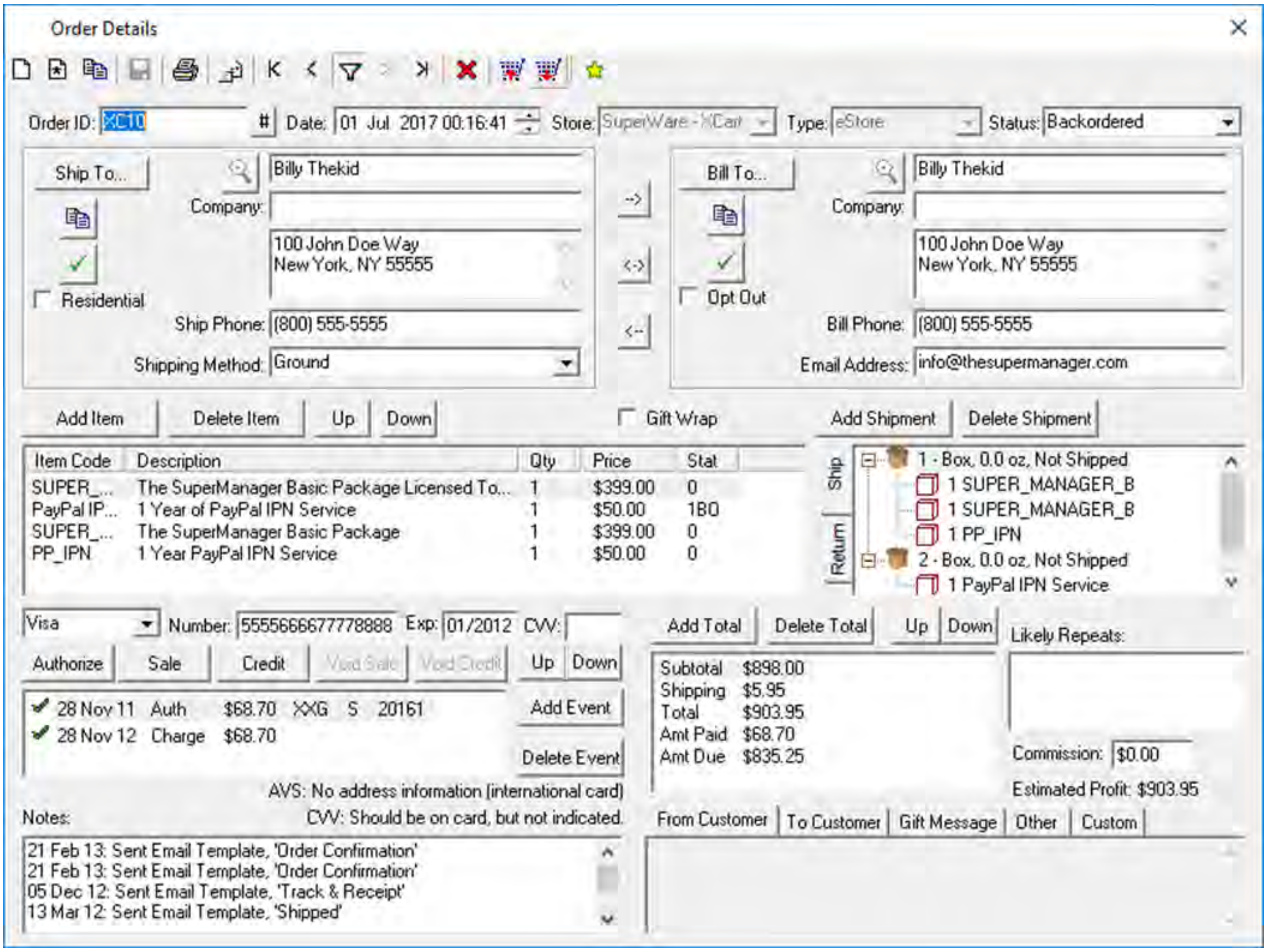
Mark Batched	Marks all the payments for all the selected order(s) as batched.
Copy from Batches	If charges are made directly in your Authorize.net or Yahoo Store! rather than making them through SuperManager, the payment events will need to be also added to your orders in SuperManager. This function attempts to copy transactions from your merchant batches into your orders.
Authorize.net Unsettled Transactions	Downloads transactions from your Authorize.net account if you have added it in SuperManager. After setting up the service this function will get the PayPal transactions you have received and automatically add them as payment events to the orders they are from.

8.4.b Keyboard Shortcuts

Several keyboard shortcuts are available to perform some of the same functions discussed above. A full list of these shortcuts is in section 3.0.

8.5. Modifying Orders

To bring up the details of an order to modify or view specifics of an order use the “Open” function as show above or double-click it to open the order details screen.



In this window you will see all of the information stored in your order.

8.5.a The Order Details Toolbar

The toolbar at the top contains several buttons for working with your orders:

- Creates a new, blank order
- Creates a new order to the same customer as the current order. Address and payment information will be copied from the current order.
- Create an exact copy of the current order, except the order id. Use this for recurring orders.
- Save changes made to the order. All changes you make to your orders are stored in a buffer. They are not written back into your database until they are saved. Saving the changes here does not, however, save them to the physical file on disk. To do that you have to use the “File”, “Save” function.
- Print an invoice of this order using the default invoice template.

Brings up a menu containing all your defined email templates, allowing you to send any of them to the customer you are viewing.

Scroll through your orders. The arrows with the bars jump to the first or last order, the regular arrows jump the previous or next order. By clicking the toggling filter button to on, the orders you scroll through will be limited to those on the order list currently in view in the orders dialog.

Deletes the current order being shown

Update order changes to your online store

Download order changes from your online store

Requests a rating from the customer through your online store. Currently this is only offered for Yahoo! Store.

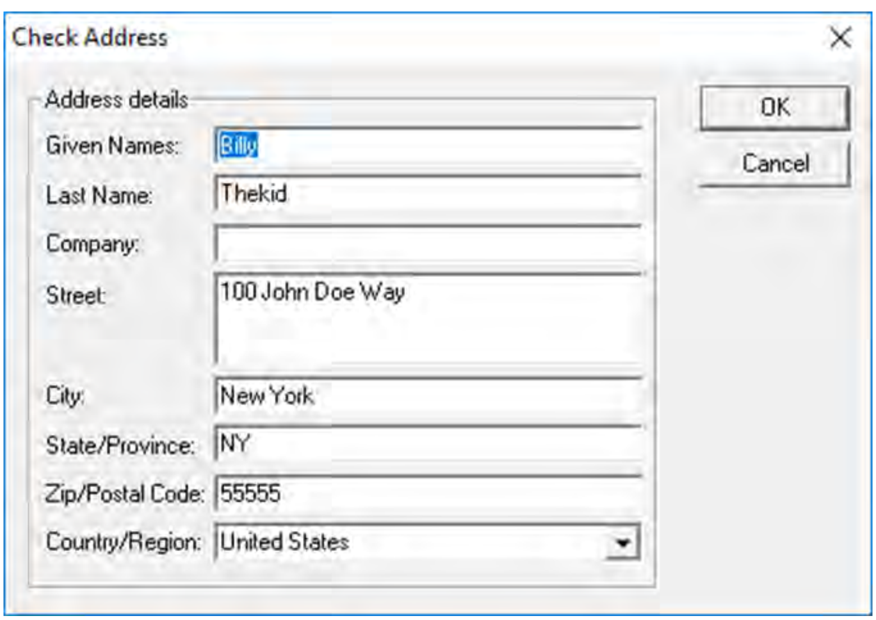
In addition to the arrows on the toolbar you can use the “Order ID” dropdown to move to another order.

Use the “Order Type” field to specify how you received this order. For orders downloaded from your online store this will automatically be set to “eStore”. You cannot change the order type for downloaded orders, although you can rename this order type as described in section 6.7. In this same section it describes how you can setup order types to distinguish between orders received via phone, fax, in your brick and mortar store or via other avenues.

The “Order Status” shows the status just as it is displayed on the order list of the Order Dialog. It may be changed here.

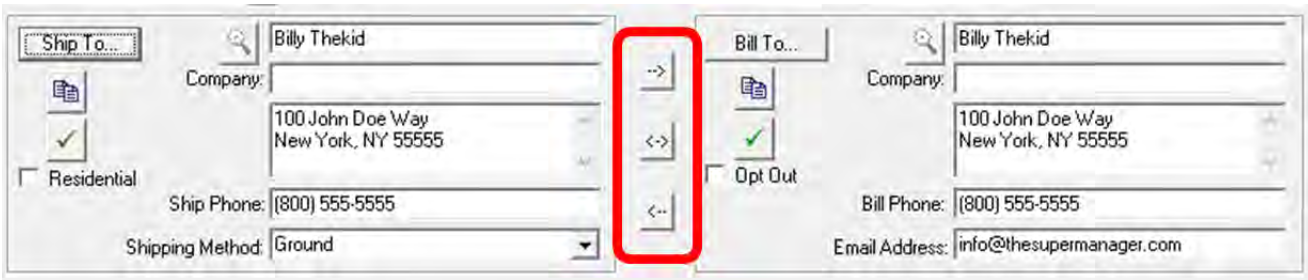
8.5.b Entering Addresses

When you enter the address information in the “Ship to” and “Bill to” boxes, The SuperManager will attempt to parse the address into the different fields. If it cannot understand the different pieces of the address a dialog will appear in which you can enter the address line by line.



If you prefer, you can also jump straight to entering the address field by field by pressing the “Ship To…” or “Bill To…” buttons next to the address.

The arrows in between the shipping and billing address can be used to copy one address to the other.

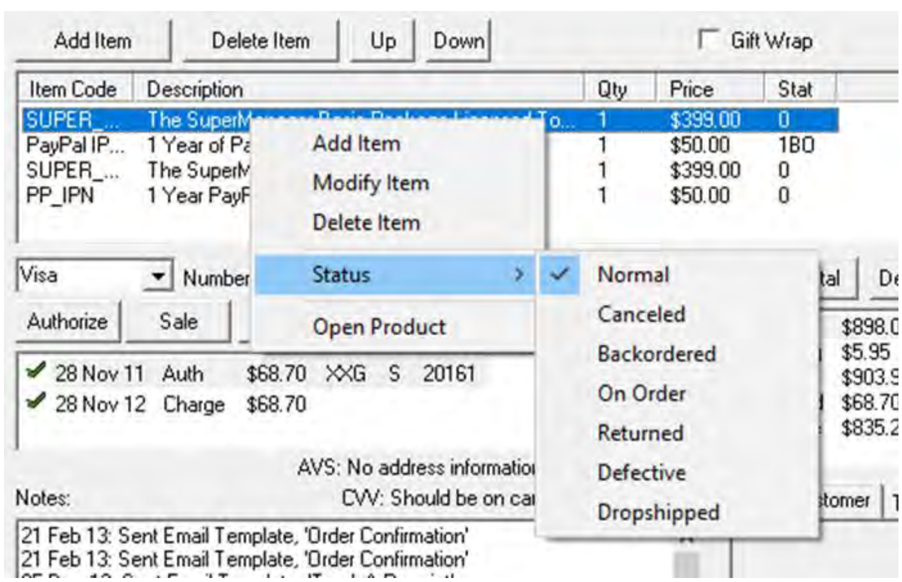


The “Opt Out” checkmark is to flag orders in which the customer has requested not to receive solicitous communications from you.

Note: In Yahoo! Store, you can add a custom variable to your address information called “Opt Out” and the value is set to “YES” this checkmark will be checked when the order is downloaded. Once this checkmark is selected you will be warned before sending an email to the customer.

8.5.c Working with Order Items

You can add or delete items from an order by clicking on the “Add” and “Delete Item” buttons. You can also right-click in the Order Item List and options to add, delete and edit items will appear.



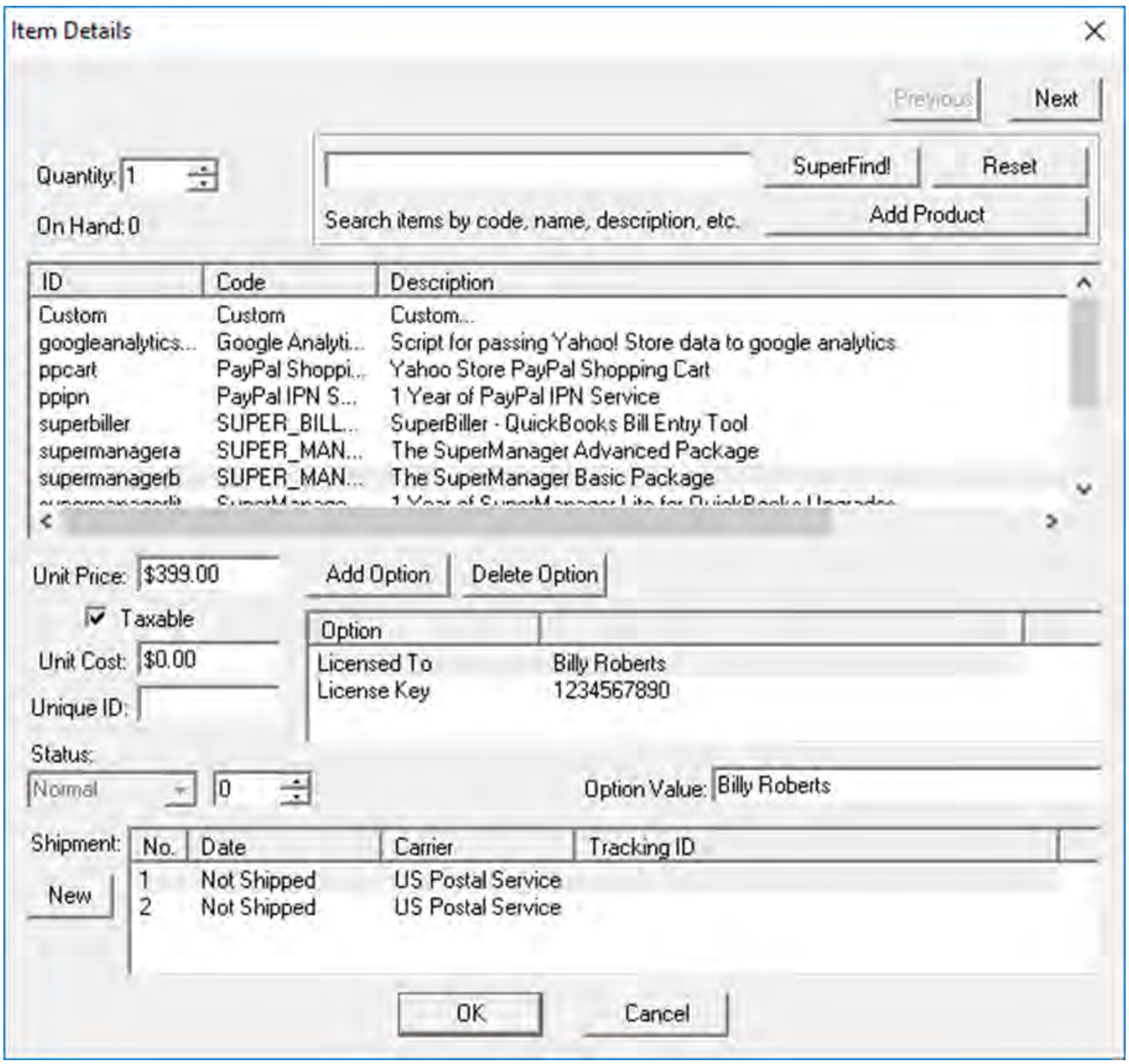
Additionally you can change the status of the item selection to one of the following:

Normal The item will be delivered as requested.

Canceled Customer has canceled the item or item will not available and will not be sent to the customer. The item price is excluded from the order subtotal.

Backordered	Item is backordered. The amount for this item is handled according to your backordered item treatment preference in the program settings. See section 7.1.
On Order	The item is included on a PO and will be set back to normal status when the PO has been received.
Returned	The item has been returned by the customer and goes back to inventory.
Defective	The item has been returned by the customer, but will not go back to inventory.
Dropshipped	The item has been sent to a drop ship vendor for fulfillment

The "Add Item" or "Modify Item" selection will open the Item Details Dialog as shown below.



Here you can modify the Price, Quantity, Taxable Status or Number Backordered, and shipment number for an item. If you modify prices or costs, those modifications only apply to the specific order that you are modifying. You can search your product database using the SuperFind function to find specific items to add to your order. You can also double click on a product to open its details for closer inspection.

When you mark an item "Backordered", The SuperManager will automatically change the order status to "Backordered". You can use the variable "backordered_items" to include in emails to customers a list the backordered items. Just add the variable to an email template and The SuperManager will replace it with a list of the backordered items for that order.

A unique ID is provided to be able to distinctly reference this item in this order. This is used by some shopping carts for tracking fulfillment.

If there are options in the product you have selected to add to this order, you will be given a list of those options and can set the values for each one. You can also add, delete, rename or modify options in the item. To rename an option select it from the option list, then click on the name.

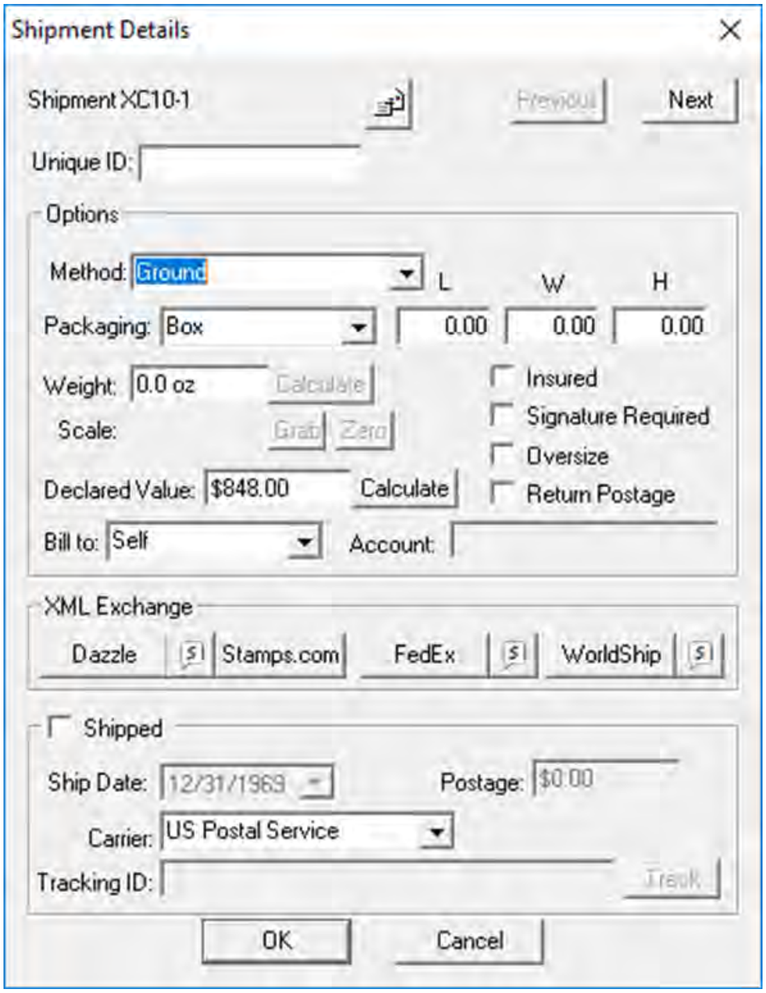
At the bottom of the dialog is the shipment information for the order. The shipment this item belongs to is selected on the list. You can change the shipment by selecting a different one. You can also move items from one shipment to another via drag and drop on main the order details dialog.

8.5.d Working with Shipments

When you download or create a new order one shipment is added to it. You can add additional shipments to it by clicking the add button above the shipments tree.

For example an order with one or more backordered items should have two shipments: one containing the items that you ship right away and another containing the items on backorder that will be shipped later. Once you have specified more than one shipment is in an order you must open each item and specify which shipment it will be shipped with as described above. You should setup the number of shipments before you add weight information or export to your shipping software.

Shipment information can be changed by double clicking on the shipment of interest



The ship method by default will match the ship method for the order, but it can be changed. This allows you to ship one shipment overnight, for example and another ground.

The package type defaults to the default package type for the order’s ship method. This is set in the ship method settings. See section 6.8.a for how to do this. The dimensions of the package default to the dimensions entered for the package type. See section 6.8.f for how to do this. You can, however, adjust the dimensions if they are different than the default dimensions for the package type you have selected.

The weight is by default calculated based on your store settings. You can choose to have a particular weight assigned to each shipment regardless of item and package weights (See section 6.6). Typically, however, weight is calculated as the total of the weight of each item plus the packaging weight. Item weights are set in the products or products details screens (See section 9.0). The package weights are set in the package type store settings (See section 6.6). You can also enter a weight specific to this shipment. If you have an electronic scale and have set it up for use in SuperManager you can use the “Grab” button to take the weight currently on the scale. After entering a specific weight you can press the “Calculate” button to switch back to having the weight calculated from the total of the items and packaging.

Other shipment options, such as “Insured”, “Signature Required” and “Oversized” can be enabled or disabled. “Return Postage” can be enabled to have DAZzle, FedEx Web Services or WorldShip reverse the addresses on the label to print a shipping label from the customer back to you. Currently this feature is not available with Stamps.com

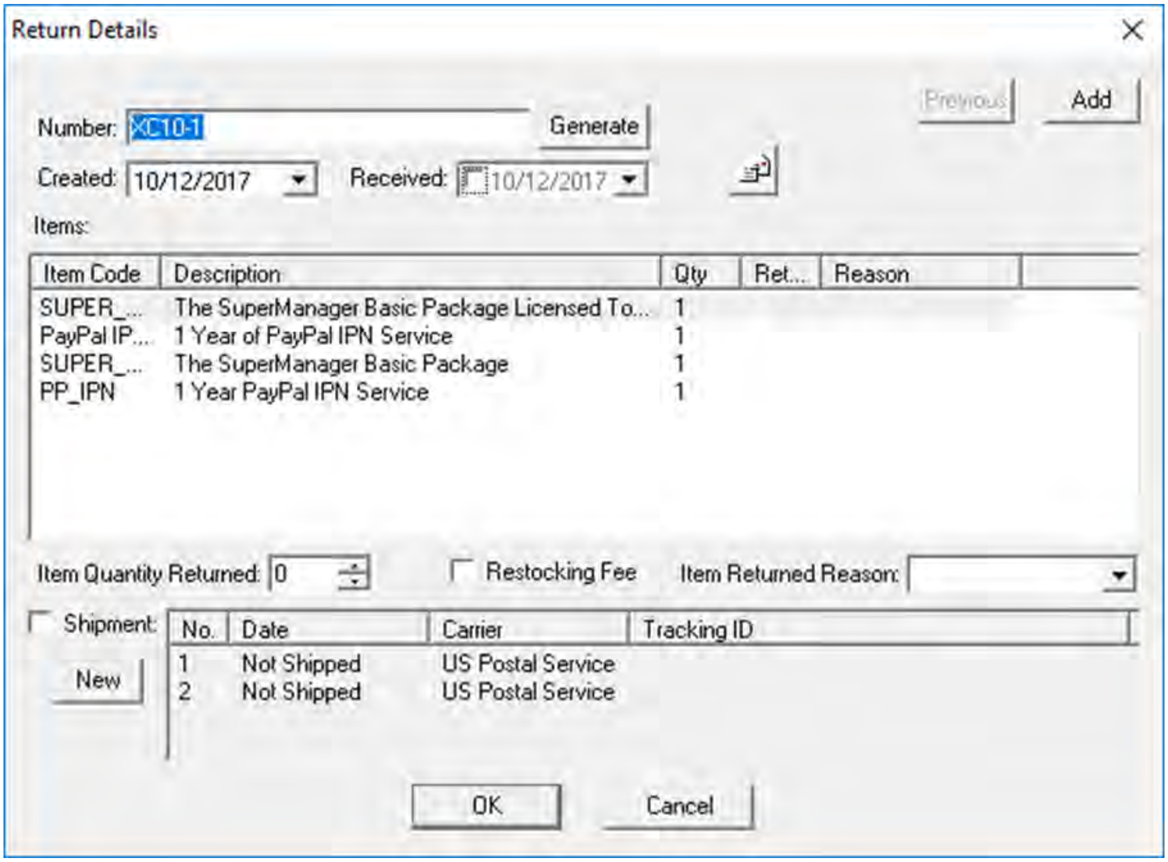
The declared value defaults to the total of the declared values for each of the items in the order. Item declared values are set in the products or products details screens (See section 9.0). You can also assign a declared value specifically for a particular shipment. After entering a specific declared value you can press the “Calculate” button to switch back to having the declared value calculated from the total of the items.

You can press the “DAZzle”, “Stamps.com”, “FedEx” or “WorldShip” buttons to XML exchange with DAZzle, Stamps.com’s client application, FedEx Web Services or UPS’s WorldShip software. You can press the quote button between the two USPS exports or next to FedEx or WorldShip to get a quote on shipping this shipment through FedEx or UPS with each of the available services. You can also manually record a shipment as being shipped and record the ship date, postage fees, carrier and tracking ID.

8.5.e Working with Returns

You can add returns to your orders to record returns scheduled or received from customers. To access the returns section, switch the “Ship”/”Return” tab to “Returns”.

You can press the “Add Return” button to add a new return, “Delete Return” to delete a return you previously created or double on a return to open and edit the return details. When you add or edit a return the following return details screen comes up.



The number field can contain any value, however, by default it is the order ID with an index appended to it. If you press the “Generate” button a 4-digit random alphabetical extension is added. You can use this feature to generate RMAs to have customers include on the outside of the return package.

The “Created” date automatically populates on the date the return is created, but you can change it by entering the date using the text box or clicking the down arrow and selecting a date from the calendar. The “Received” date can be toggled on and off by checking the box right next to the date. If this box is not checked, SuperManager will assume the return has not yet been received.

You can add or remove items from the return by selecting the item from the list and then setting the “Item Quantity Returned” to a number greater than zero. If you change the quantity back to zero, the item will be removed from the return.

Enable the restocking fee using the checkbox next to the quantity. This setting defaults checked or unchecked based on what you have chosen in the store settings (See section 6.6). The percent used for the restocking fee is always the percent defined in the store settings (See section 6.6).

You can also select a reason the items were returned. If you set the reason to defective, the items will not be added back to the inventory. If the reason is set to “Exchange” or “Return” the returned items will be added back to your inventory.

If you want to assign the return to a shipment, check the box next to “Shipment” and choose a shipment from the list. If you want to assign it to a new shipment press the “New” button and a new shipment will be created and selected on the list. This is especially useful for generating return postage since when a return is assigned to a shipment the shipment weight and declared value will include the items in the shipment.

The email button at the top is used for sending an email to the customer concerning the return. When an email sent to the customer from this screen includes item information it will only include the items and quantities included in the return.

8.5.f Charging and Crediting Credit Cards

Payments performed in your shopping cart can be downloaded into SuperManager for most carts. Note that for Yahoo! Store, charges and credits created through the standard order processing page are downloaded. If you subscribe to the SuperManager PayPal IPN service PayPal payments received even from outside of the shopping cart will also be downloaded. All these events are shown in a list at the bottom left of the order details page. Whenever you make a manual sale, credit, void sale or void credit from within The SuperManager these events will also be displayed on this list. Additionally you can manually add events to this list to record other payments received from a customer. Use the “Add Event” and “Delete Event” buttons for this purpose.

Use the Authorization, Sale, Credit, Void Sale and Void Credit buttons to manage the charging and crediting of your orders. The Void Sale and Void Credit buttons can be activated by selecting the charge or credit you want to void. If a charge has already been batched, the void buttons will be unavailable. Batched transactions will have a checkmark next to them. Once you have batched ("Submit Batches") a charge or credit, you must issue a credit or sale respectively to cancel the previous transaction. Transactions are marked batched if the batch that contains them has been downloaded. See section 10.0 about working with batches.

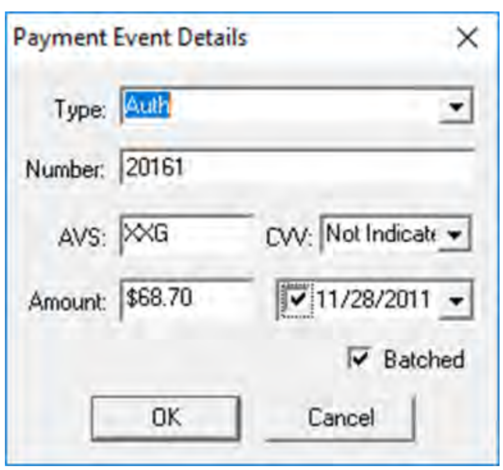
When using SuperManager with Yahoo! Store, SuperManager issues the first sale and credit through the Yahoo! Store manager order details page. Additional transactions or transactions for orders made outside of your Yahoo! Store are made through the manual transactions page.

When you make a transaction in The SuperManager a credit card event will be added to the card event list for future reference.

For new orders, you can obtain an authorization first and view the AVS response and then immediately capture the sale. You can also authorize credit cards by $0.01 to verify updated billing addresses which previously returned a negative AVS response.

Use the security settings to limit access to the credit card authorizing, charging and crediting functions. See section 6.2 for more information.

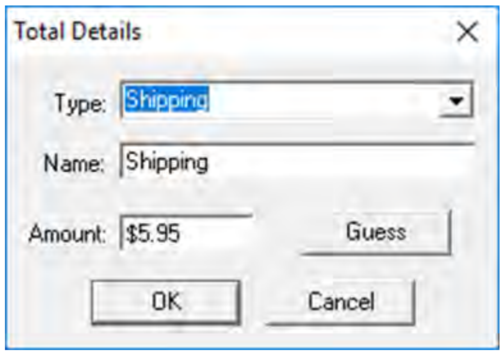
Payments made outside of SuperManager, such as checks or cash you have received or credit card or PayPal transactions made outside of SuperManager can be recorded by pressing the “Add Event” button. Existing payment events can be modified by double clicking on them.



8.5.g Working with Order Totals

SuperManager automatically calculates a subtotal, final total, amount paid and amount due for each order.

Other totals, such as shipping, discounts, credits, restocking fees and miscellaneous adjustments can be added, deleted and modified. When you press the “Add Total” button or double click on an existing total you can modify it on the total details screen.



The name field is by default set to the type. It can be changed to better document what the total line item is for. For example you could add a discount total and give it “Good Customer” for a name.

The “Guess” button can be used to adjust the amount due to the amount paid. For example if an order currently has $25 as the amount due and there is a payment for $20 in the order the guess button will set the value to -5$. If you have put a taxes and shipping script in your store settings (See section 6.6) and you are adding/modifying a tax or shipping total the button will say “Query” instead. When you press it, SuperManager will query your script and set the total amount to the amount returned by the script.

8.5.h Messages, Other and Custom Fields

In the bottom right hand corner of the screen is a set of tabs that toggle between “From Customer”, “To Customer”, “Gift Message”, “Other” and “Custom”.

“From Customer” is the message that your customer entered in the shopping cart when creating the order. This field is not editable.

“To Customer” is a message you want to send to you customer. You can print this message on your report templates by using the “order_merchant_comments” variable.

“Gift Message” is a gift message that the customer entered in the shopping cart. This field is editable so if a customer contacts you after submitting the order and asks you to add that information to the order, you can do so.

The “Other” tab has a series of other order fields that are less common to have to view and/or modify. These fields can be modified by double clicking on the field to modify and editing the value in the box provided. One of the more common fields to need to view is the “Alternative ID” field. This field is provided since SuperManager requires that the primary ID for orders is numeric with perhaps a suffix and/or prefix. This alternative ID provides you a second order ID that can be completely free-form. Some shopping carts, such as Amazon have IDs that cannot fit into SuperManager’s requirements. This gives a way for SuperManager to still interface seamlessly with such carts.

The “Custom” tab offers a free-form set of additional fields. Yahoo! Store allows you to generate such fields for gathering additional information from your customers during order gathering. On this tab you can see custom fields gathered in this fashion and also add, delete and modify such fields.

8.6. Moving Orders from Open to Closed

The SuperManager will help you assure that each customer is charged the amount due and that all items are shipped. To help you do this the order list is set up with various tabs to help you quickly asses which orders require action. The “Open” tab is intended to show you which orders require attention. You can set which orders are considered open by changing the setting as described in section 6.6.

As discussed in section 8.3.a, in order for an item to be marked charged/paid it needs to have the amount received from the customer equal to the amount due. The amount due can be adjusted in two primary ways. First you can change the amount due by adding, removing, changing quantities or prices for the items in the order. Secondly you can change the amount due by adding, removing or changing amounts of the total line items.

Once you have recorded payments that total to the amount due from the customer the status of the order will automatically change to reflect that it has been charged or paid. Orders with credit card transactions will be marked as charged and those with PayPal or cash transactions will be marked as paid. This will also transfer the order from the “Open” to the “Closed” tab on the order list if you have chosen to have payment status to be the only consideration for open and closed orders. Again refer to section 6.6 for your options in this regard.

9.0 Products

Products management is offered in The SuperManager to view products as they are entered in your online store, export them to other programs, create offline orders and track order profit. The product details dialog is the core of the product management features. See section 5.3 for an overview of the products screen.

9.1. Downloading Products

Use the "Update Products" to download your products from your online store. The same function can also be run by clicking “Actions” then “Update Products”. You can also import products from a file by clicking "File", then "Import" then select "Yahoo Product CSV" or select an import format you created in section 7.6. Additionally products will automatically be added to your store database as you download orders containing items not already contained in your product list in The SuperManager.

9.1.a Mapping of Product identifiers

SuperManager uses two fields to identify products, the ID and code. These fields are mapped to the identifiers of the supported shopping carts in the following manner:

	ID	Code
3dCart	3dCart ItemID	3dCart ItemID
Amazon	Pulled from SuperManager’s product list when there is a product with code=Amazon SellerSKU. If none is found, same as the code	Amazon SellerSKU
Americart	Pulled from SuperManager’s product list when there is a product with code=Americart first item field. If none is found, same as the code.	First item field in the CSV export
Big Commerce	Big Commerce product_id	Big Commerce sku
Claim The Web	Claim The Web ID	Claim The Web code
EBay TXT Import	Pulled from SuperManager’s product list when there is a product with code=EBay Custom Label. If none is found, same as the code.	EBay Custom Label
GrabCart	Pulled from SuperManager’s product list when there is a product with code=GrabCart Product ID. If none is found, same as the code.	GrabCart Product ID
Magento	Pulled from SuperManager’s product list when there is a product with code=Magento sku. If none is found, uses the Magento item_id (a numerical value shown in the “ID” column of your product list)	Magento sku
OpenCart	OpenCart model if populated if not product_id	OpenCart model if populated if not product_id
osCommerce	Pulled from SuperManager’s product list when there is a product with code=osCommerce model field. If none is found, same as the code.	osCommerce model

PrestaShop	PrestaShop product_id	PrestaShop product_reference
QuickBooks	QuickBooks item name	QuickBooks item name
SendOwl	SendOwl product_id or package_id	SendOwl product_id or package_id
Ship Station	Ship Station sku	Ship Station sku
Shopify	Shopify item_id	Shopify sku
ShopSite	ShopSite SKU	ShopSite SKU
SparkPay	SparkPay item_number	SparkPay item_number
Staples Import	Pulled from SuperManager's product list when there is a product with code=vendor_sku. If none is found, uses the Staples upc_id.	Staples vendor_sku
Volusion	Volusion ProductID	Volusion ProductCode
Walmart	Walmart SKU	Walmart SKU
WooCommerce	Pulled from SuperManager's product list when there is a product with code=WooCommerce sku. If none is found, uses the WooCommerce product_id	WooCommerce sku
XCart	XCart productid	XCart productcode
Yahoo	Yahoo id	Yahoo code
ZenCart	ZenCart model	ZenCart model

9.2. The Product List

The product list can be used to get a quick look at all your products. Some frequently edited product fields are also available for viewing and editing just below the product list. Note that you can select one or more products on the list and change their price, cost, weight, dropship status or caption. If you select multiple products before modifying one of these fields, the modification will be applied to all the selected products.

9.2.a Product List Tabs

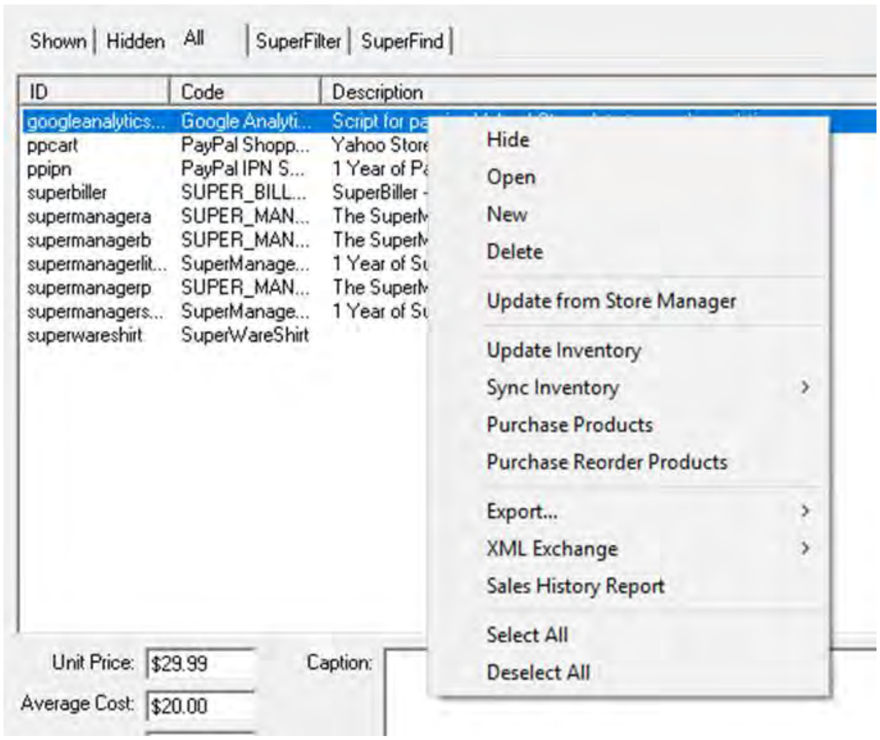
You may find that some of your products are missing in this list. This is because SuperManager automatically hides all products it imports that have a price of $0.00. You can switch to the “Hidden” tab to find these products.

The SuperFilter tab allows you to apply a lot of different filters. You can use sequential filtering as explained for the order list.

Use the SuperFind to filter the product list to those returned by the search. Click the “Reset” button to show all products again.

9.2.b Functions Available from the Product List

When you right click on the product list a context menu will appear containing several functions.



Hide Sends the selected products to the “Hidden” tab. If the products are already hidden it will unhide them.

Open Opens the active product in the product details screen.

New Adds a new product and opens the details screen so you can enter the details for the new product.

Delete Deletes the selected product(s).

Update from Store Manager Updating individual product entries is supported from certain shopping carts. If you have supported shopping carts defined in your store settings they will show up as a submenu when you hover over this menu item.

Update Inventory This option only shows when “Track Inventory” is enabled in the store settings. (See section 6.6).

Brings up a popup window with the current inventory and allows you to input a corrected inventory value. Adjustments are made in the inventory as necessary.

Sync Inventory This option only shows when “Track Inventory” is enabled in the store settings. (See section 6.6).

Synchronizes inventory with the SuperWare real-time inventory server. See http://www.thesupermanager.com/yahoo-real-time-inventory.php for more details.

Purchase products This option only shows when “Track Inventory” is enabled in the store settings. (See section 6.6).

Creates PO(s) to each supplier for the selected products and adds products to the proper PO.

Purchase Reorder products This option only shows when “Track Inventory” is enabled in the store settings. (See section 6.6).

Creates PO(s) to each supplier for the selected products that are below the re-order point and adds products to the proper PO.

Export Exports the selected product(s) to one of the product exports in your program settings. See section 7.4 for instructions on defining export formats.

XML Exchange Allows you to export the selected product(s) to QuickBooks or QuickBooks POS.

Sales History Report Brings up a pop-up box for defining a date range, report template and variant to use for creating a sales history report for the selected product(s).

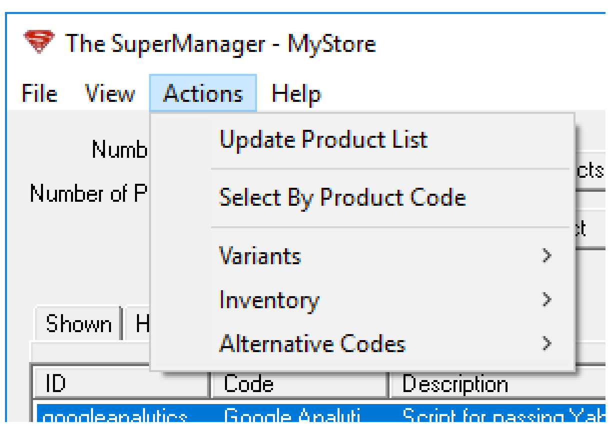
Select/Deselect All Selects all products in the current list.

9.3. Other Functions available from the Products Screen

When you click “Update Products” SuperManager will download your product list from supported store types. You can click “New Product” to create a new product. This product will not be automatically copied to your online store, however, you may be able to export it in a text format that could be imported into your online store.

9.3.a The Product Actions Menu

When you choose “Actions” from the main menu while on the products screen several other functions are available



Update Product List Runs the same function as when you click the button on the dialog.

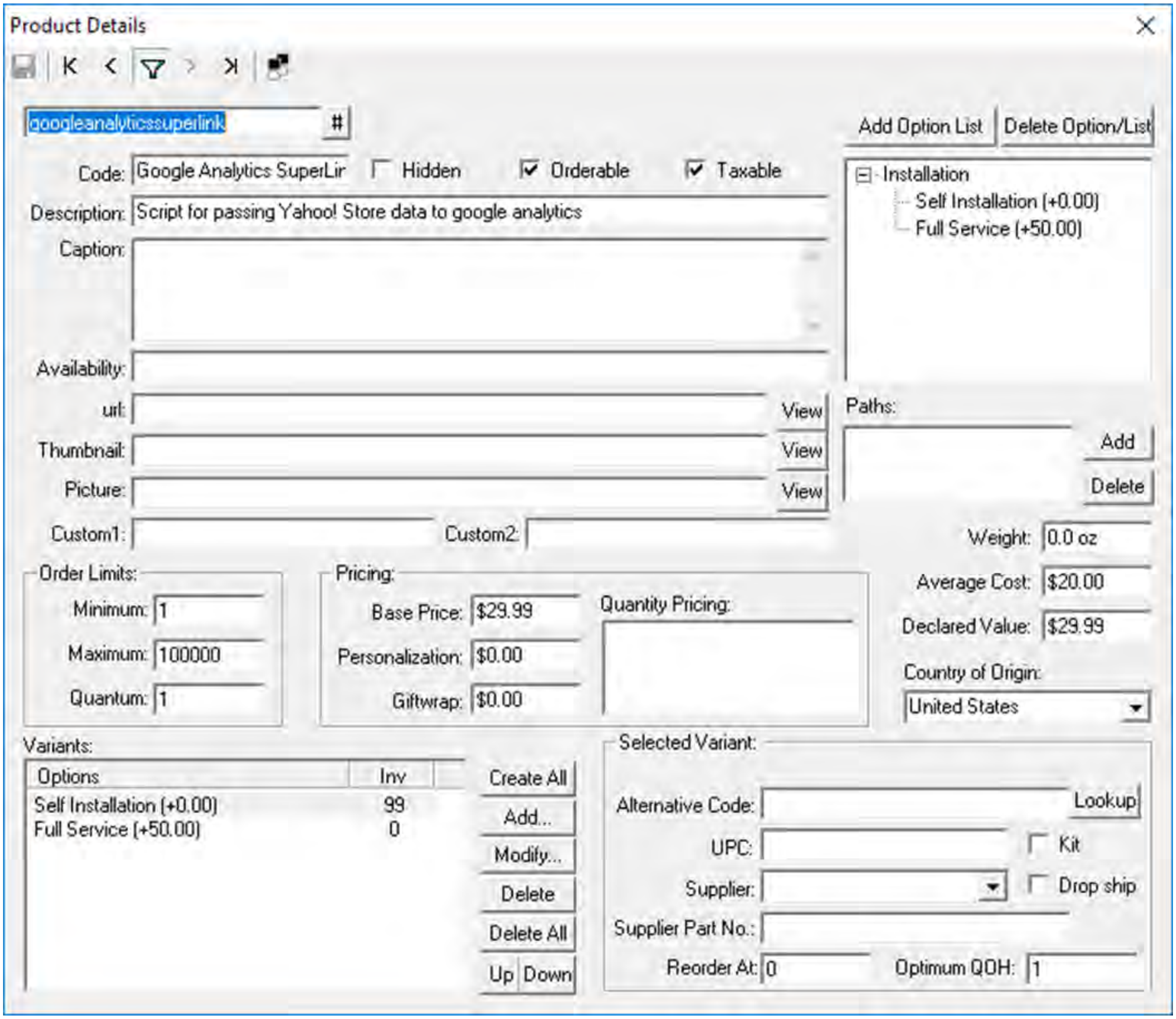
Select By Product Code Allows you to enter the product code to select just the desired product(s) on the product list.

Variants — Create Default Creates a default variant for the selected product(s). Variants will be discussed more in the next section.

	Create All	Creates all variants for the selected product(s). Variants will be discussed more in the next section.
	Delete All	Deletes all variants for the selected product(s). Variants will be discussed more in the next section.
Inventory	**Update**	Cycles through each variant in the select product(s) and allows you to enter an inventory value for each of them. Inventory will be modified by adding an adjustment lot. Inventory lots will be discussed more in the next section.
	Clear All Lots	Clears all inventory lots, thereby setting inventory to zero, for all variants in the selected product(s).
Alternative Codes	**Prepare for QuickBooks**	Creates an alternative code that meets the requirements of QuickBooks for each variant for the selected product(s). This is not usually required since SuperManager will create product names on the fly when exporting to QuickBooks. This is only required when the list of options for a variant will result in a character string longer than 32 characters.
	Prepare of QuickBooks POS	Creates an alternative code that meets the requirements of QuickBooks for each variant for the selected product(s). This is not usually required since SuperManager will create product names on the fly when exporting to QuickBooks. This is only required when the list of options for a variant will result in a character string longer than 20 when using the ALU as the lookup, 30 when using one of the description fields or 18 when using the SKU.
	Lookup QuickBooks Item By Name	Queries your QuickBooks database for an item name starting with the product code in your SuperManager product list for the selected product(s).
	Lookup QuickBooks Item By Description	Queries your QuickBooks database for an item that matches the description product code in your SuperManager product list for the selected product(s).
	Lookup QuickBooks POS Item	Queries your QuickBooks POS database for an item that has the product code in your SuperManager product list in the field you have selected as the lookup field (See section 6.9) for the selected product(s).
	Clear Alternative Codes	Empties the alternative codes for all variants of the selected product(s).

9.4. Modifying Products

To bring up the details of a product to modify or view specifics of a product use the “Open” function as show above or double-click it to open the product details screen.

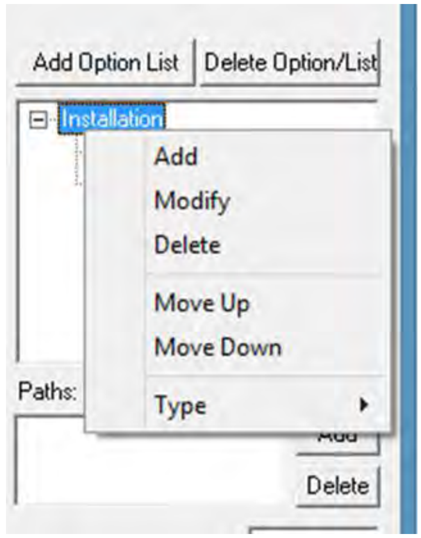


The toolbar contains the same navigation buttons as the order details screen. Refer to section 8.5.a for descriptions.

The weight field is used for establishing the weight of shipments.

9.4.a Adding, Modifying and Deleting Options

Option lists can be added or deleted using the buttons above the options tree.



You can right click on an option list and add, modify or delete an option. You can use the “Move Up” and “Move Down” options to change the order of the option lists or options. You can also set the type to select, inscription or initials. A select option list allows you to specify a list of possible options and choose one to assign to an order item. Select option lists are the only options considered when creating variants for a product (see below for more discussion of product variants). Further, options can be set to “Set, Exclude from Variants” to ignore them when creating variants. Inscription options allow you to enter a character string of any size when the product is added as an order item. Initials options allow you to enter three initials when the product is added as an order item.

To add an incremental price associated with selecting a particular item, you can add an amount in parenthesis at the end of the option (ex: “(+50.00)”) would automatically add $50 to the item price when that particular option is selected. To subtract an amount from the price use a minus sign instead (ex: “(-5.00)”).

9.4.b Working with Product Variants

Product variants are unique combinations of options that exist for a given product. For example, if a product has two option lists, color and size, and there are two colors, blue and white, and two sizes, large and small, the product would have four variants, “blue-large”, “blue-small”, “white-large” and “white-small”.

SuperManager uses variants to track inventory. If you want to track inventory for a given product, regardless of whether or not that product has options, you will need to create variants for it. For a product with no options, there will be just one variant that shares its name with the product code.

The product details page gives several functions for working with variants. When you press the “Create All” button, SuperManager will create all the available variants for the product based on the options that are defined for the product. If some of the variants already exist, SuperManager will keep the inventory and any settings you have already entered for that variant and add any variants that have not already been created. When you press the “Add…” button, SuperManager will display a list of variants that could be added, but do not yet exist for the product. When you press the “Delete” button the variant that you have highlighted on the list will be deleted. Along with deleting the variant, all the inventory and settings stored for that variant will be deleted. The “Delete All” button will delete all variants for the product.

You can assign an alternative code to each variant. This code can be used as an item name when importing orders from a text file. It is also used as the QuickBooks item name when you export an order to QuickBooks that includes this product. Most often alternative codes are used for matching SuperManager's products to items that you have already defined in your QuickBooks item list. Integrating SuperManager with QuickBooks will be further discussed in section 11.1.

UPC is simply provided for your information.

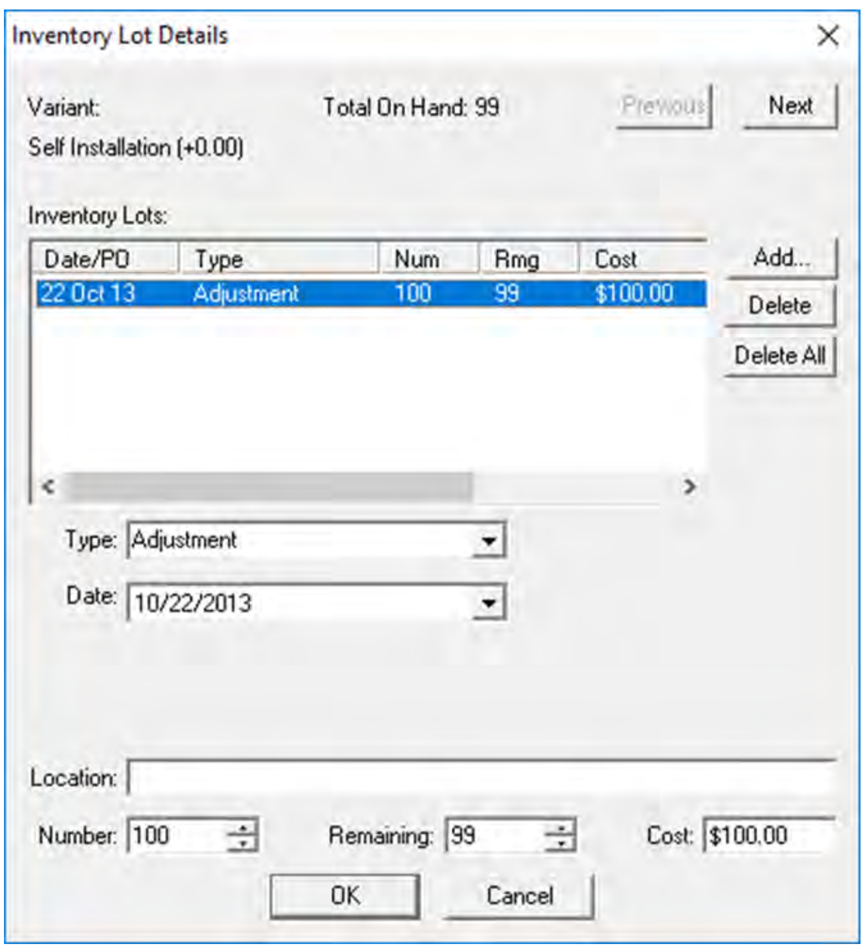
The supplier field allows you to choose a supplier for the variant from among the list of suppliers you have defined in SuperManager's supplier screen. You can check the dropship option to enable SuperManager to send automated emails to the supplier when an order containing that variant is received. To enable this feature, you will also need to turn it on in your store settings (See section 6.6). You will also need to have chosen an email template to use when sending such requests to this supplier.

The supplier part number is used when the variant is added to a PO. The default PO template is setup to print the PO with the supplier part number rather than the product code you use.

Under reorder at you can enter a minimum amount of this variant you want to have in stock. On the product list of the main products screen you can filter the products to only products that have lower inventory than the amount you have specified. You can also enable an option in SuperManager to send an email reminder when the reorder limit is reached. This can serve as a reminder to yourself, your buyer or your supplier that you need to order more of that variant.

9.4.c Working with Inventory

When you double click on a variant it opens the inventory lots screen.



Inventory levels are established by the sum of the “Remaining” amount of each inventory lot. Inventory lots are used to allow you to track individual shipments of a particular product variant. SuperManager uses first-in-first-out (FIFO) costing to assign costs to items that have been added to your orders. As the inventory lots are shown on this list, it will first take available inventory from the lots at the bottom of the list, then as they are expended move up the list until it finds remaining inventory.

Inventory lot type can be set to one of the following:

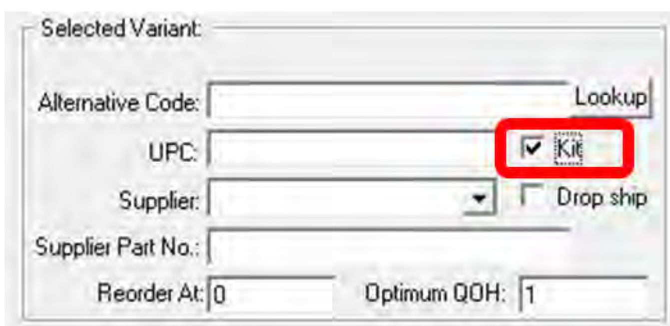
Adjustment	This is type you will use for any lots you manually add to a variant.
Ordered	SuperManager creates this type of inventory lot when you have added this variant to a PO, but it has not yet been received. You should not manually assign lots to this type.
Received	SuperManager creates this type of inventory lot when this variant is part of a PO that has been marked as received. You should not manually assign lots to this type.
Out of Stock	This type of lot is used for keeping track of the number of backorders you have for this item.

The location of the inventory lot can be set to make it easier to track down a batch of inventory in your warehouse or store.

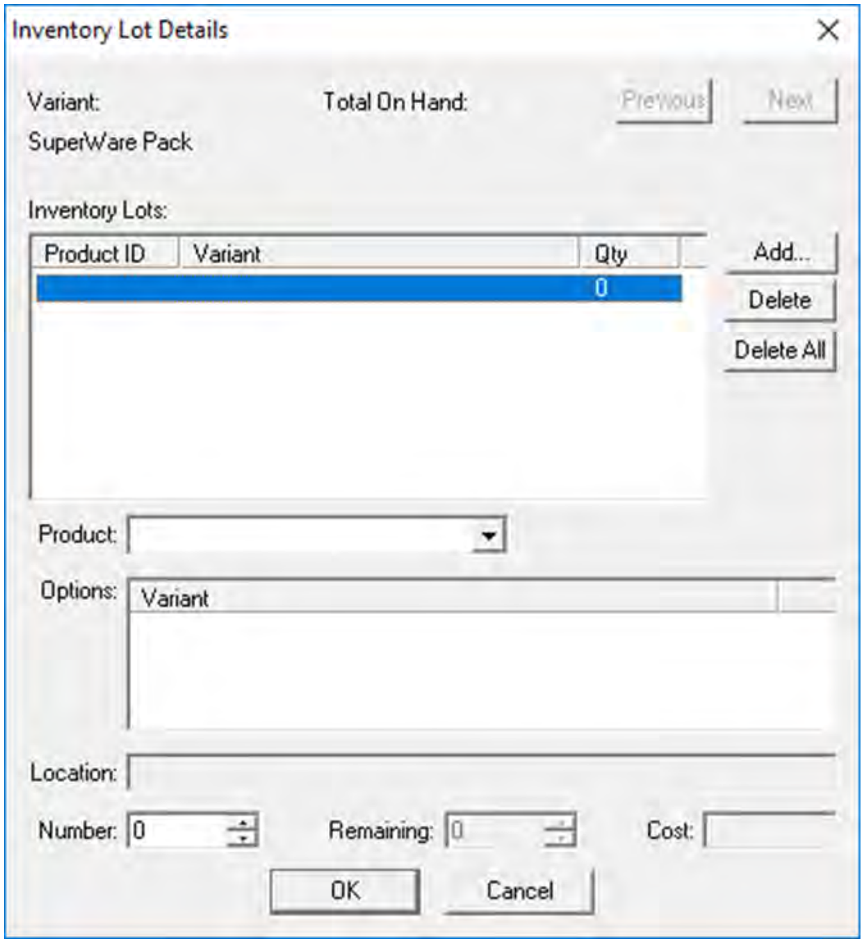
The previous and next buttons can be used for navigating from one variant to another.

9.4.d Kit Product Variants

You can define a product variant as a kit. When a variant is designated as a kit, no inventory is tracked for that item itself. Instead, inventory is tracked for each of the child items that form the kit. To specify a product variant as a kit, check the “Kit” option box in the variant settings:



When you select this option, the lot details screen comes up, but with a version of it that allows you to specify the child items that are part of the kit:



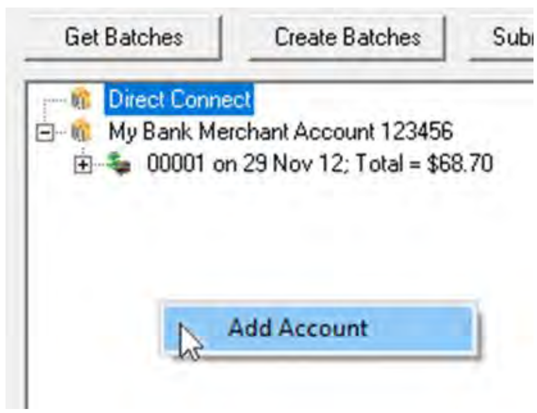
You can get back to the kit definition by double clicking on the variant in the variant list.

10.0 Merchant Batch Management

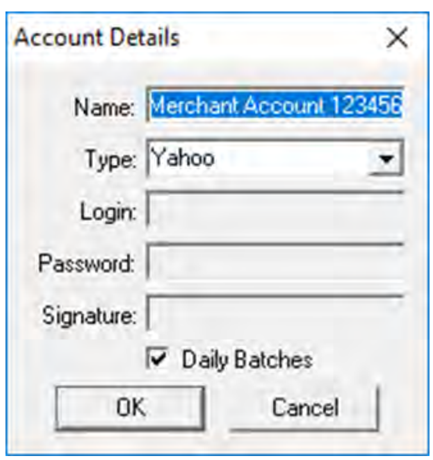
In addition to downloading your online orders, SuperManager can also download and work with credit card batches. Batches can be imported from your Amazon or Yahoo! Store or settlement reports can be downloaded from Authorize.net. All batch management tasks in SuperManager are done while on the batches screen. To get to this screen choose “View” from SuperManager’s main menu and then “Batches”. This will bring you to the screen shown in section 5.1. All of the different tasks available in this screen will be discussed in this section.

10.1. Defining Merchant Accounts

If you are using SuperManager to interface with a Yahoo! Store, the first time you press “Get Batches” or “Submit Batches” or make a manual card transaction for an order, SuperManager will download all of your merchant accounts. To define an account not in your Yahoo! Store or for stores other than Yahoo! Stores, right click on the blank area of the batch list and choose “Add Account” as shown below.



When a new account is created or you double click on an existing account, it brings up the account details screen shown below.



Accounts have the following settings in SuperManager:

Name Name that SuperManager will use to display for the account name. For Yahoo! Stores, this name must match the exact name for the account in Yahoo! Store. Other accounts can be defined with any name.

Type SuperManager currently offers the following account types:

- Yahoo – an account defined as a merchant gateway in your Yahoo! Store. SuperManager can make manual transactions through Yahoo! Store accounts, even for other stores defined in the same file as your Yahoo! Store.
- Authorize.net – SuperManager can also make transactions through Authorize.net accounts and get batches from Authorize.net automatically
- Direct Connect – SuperManager can also make transactions through Direct Connect accounts
- PayPal – SuperManager can NOT generate new transactions through PayPal directly. However, you can complete and credit back transactions previously generated.
- USA ePay – SuperManager can also make transactions through USA ePay accounts/
- Other – Generic type for any other account type.

Login This is required only for Authorize.net, Direct Connect, PayPal and USA ePay accounts.

To get this login for an Authorize.net account, go to your Authorize.net back end and click on “Settings” from the menu on the left of the page. Then click the link “API Login ID and Transaction Key” under the heading “Security Settings”.

To get this login for a Direct Connect account, go to the merchant portal and create a user that has API permissions.

To get this for USA ePay accounts, it is the key you can create in the merchant portal

To get this login for a PayPal account go to your PayPal account, hover over the “Profile” menu and click on “More Options”. Click on “My Selling Tools” and then on “API Access”. If you have not already set up API access click on “Grant API Permissions” access or if you have, click on “View API Signature”.

Password This is required only for Authorize.net, Direct Connect and PayPal accounts.

For Authorize.net, follow the instructions above and after going through the workflow to obtain a transaction key, enter that value in this field.

For Direct Connect, obtain your API credentials from Direct Connect and enter the password in this field.

For PayPal, enter the password from the same page as the API login comes from above.

Signature This is required only for PayPal accounts. Enter the signature from the same page as the API login comes from above.

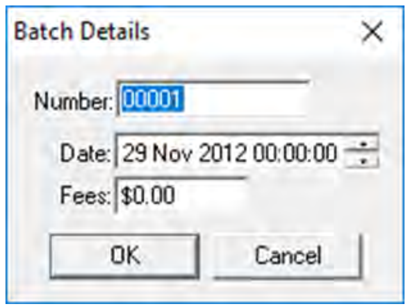
Daily Batches This setting dictates how SuperManager handles it when you click the “Create Batches” button. If you check this option, SuperManager will make a batch for each day containing a transaction through the account. Otherwise it will make one single batch with all unbatched payments made through the account.

10.2. Downloading Batches

After defining or importing your list of accounts, you can press “Get Batches” and SuperManager will download batches from all your Yahoo! Store and Authorize.net accounts. Note that when SuperManager gets batches from a Yahoo! Store it downloads all the batches for all accounts defined in that store. If you would like to exclude a Yahoo! Store from downloading batches, you can do so by unchecking the setting to get batches in the store settings as shown in section 6.1.

10.3. Looking at Batch Details

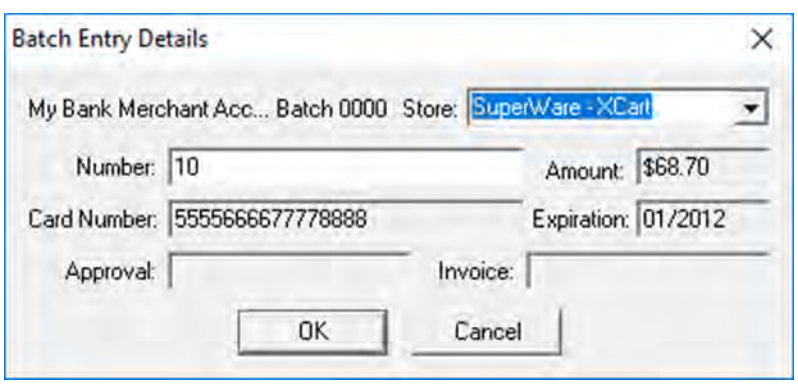
You can expand each batch to show the individual transactions that were included in it by clicking on the “+” sign to the right of it on the entry tree. If you double click on a batch, the batch details will be displayed:



This screen allows you to look at and change the batch number, date and fees. The number can be changed, but SuperManager only supports storing a numerical number for batch numbers. The fees can be filled in to document how much of the batch is taken by your merchant account before depositing to your bank account. This is primarily helpful when exporting batches to QuickBooks, which will be discussed in section 11.1.

10.4. Looking at Batch Transactions

You can also look at the details of a transaction included in a batch by then double clicking on the transaction or right clicking and choosing “Open”. The following window will appear containing the details for the batch entry you have selected.



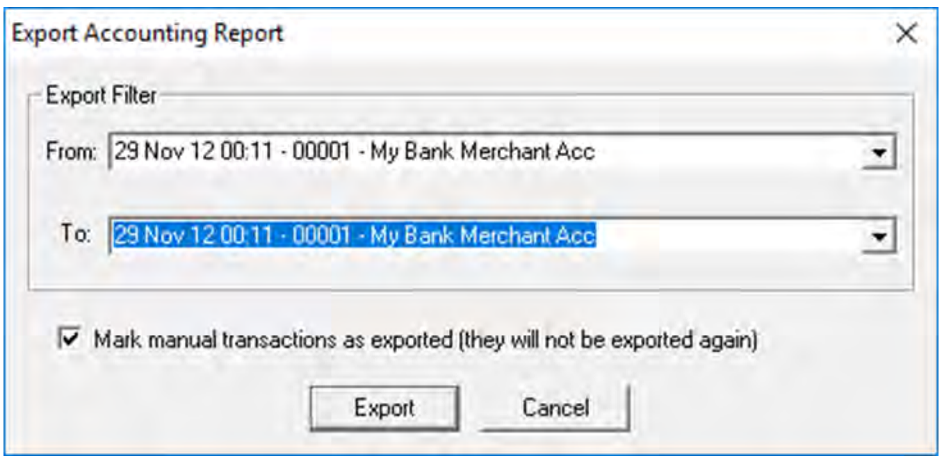
In this window the majority of the fields are not editable, but the number can be changed. In most instances SuperManager should be able to correctly associate it with the appropriate order, but if not the number can be changed to the order number to correctly associate it.

In addition to looking at the transaction details you can right click on the order and choose “Open Order” to open the order for which this transaction was made.

10.5. Accounting Export

SuperManager can interface with QuickBooks for automated export of financial information. This will be discussed in section 11.1. Once you have SuperManager set up to interface with QuickBooks, if you choose to export batches as opposed to orders, you do so using the “Accounting Export” button. This button also gives you access to exporting batches in qif format, which is read by Intuit’s Quicken and Microsoft’s Money software. You can also choose “Batches XML” to export batches to an XML format used only by SuperManager. This format is primarily provided to be able to archive batches and transfer batches between files. Additionally, you can export batches and transactions using a custom defined format defined in the program settings (See section 7.4).

When you press this button a menu will appear asking which format you want to export. After you choose the format you want to export, the screen below pops up to allow you to choose the starting and ending batch number to export.



Once you choose the starting and ending batch to export, you can choose “Mark manual transactions as batched” if you want to mark all the manual transactions in the batch as exported so they will not be exported again. Then, press “Export” to proceed with the export.

11.0 Interfacing with Other Programs

The SuperManager was designed to be very versatile in interfacing with other programs. Several direct integrations have been developed including DAZzle, WorldShip, QuickBooks and QuickBooks POS. The SuperManager also offers the powerful ability to export in practically any text format required by other software. The subheadings of this chapter explain how to setup interfaces with many programs. If you need help setting up interfaces with other programs please contact info@thesupermanager.com.

11.1. QuickBooks

The SuperManager supports the export of orders as sales receipts, order as invoices, batches as sales receipts and products as items into QuickBooks.

Important: Before exporting anything to QuickBooks make sure you have a good backup

11.1.a Deciding Whether to Export Batches or Orders

SuperManager allows you to export financial information by exporting merchant batches or orders. You do not want to export both orders and batches, since it will double all the accounting of your sales. When you export orders, SuperManager will create a sales receipt, invoice or sales order for each order. This allows you to have more detailed accounting of each transaction. It also allows you to track inventory in QuickBooks if you so desire. If you really only want to have the big picture of your sales in QuickBooks, you can export batches instead. When you export batches, SuperManager finds all the orders containing transactions in a given batch, separates out the portion of that order that are for shipping, taxes, taxable sales, etc… and totals up the sum of each account and exports a single sales receipt for each batch. This allows you to keep your financial information more simple within QuickBooks, however, the accounting is less rigorous than exporting each order, particularly when there are more than one payment transactions in an order.

11.1.b Setting up your QuickBooks file for use with The SuperManager

A few things are required in order to successfully import data from The SuperManager. First, you will need to download and install two patches from Intuit that install the necessary interfaces. These are available at

http://www.thesupermanager.com/download/redistributables/QBFC12_0Installer.exe

http://www.thesupermanager.com/download/redistributables/QBXMLRP2Installer.exe

After installing these patches you need to make sure you have an account to use for the following items:

Account	Applicable Export(s)	Purpose
Accounts Receivable	Orders	An account into which payments on credit memos and invoices are deposited.
Cost of Goods Sold	Products	An account that is linked to the products that are exported from The SuperManager as the cost of goods sold account.
Inventory Asset	Products	An account that is linked to the products that are exported from The SuperManager when you have selected to export as inventory items as the inventory asset account
Taxable Sales	Products, Batches	The account that is set as the income account for taxable products exported from The SuperManager.
Nontaxable Sales	Products, Batches	The account that is set as the income account for non-taxable products exported from The SuperManager

Additionally there are a number of items The SuperManager references in creating sales receipts, credit memos and invoices in QuickBooks. The SuperManager is capable of creating these items if they do not exist. Each of these items will be described below.

11.1.c Setup for Exporting Orders to QuickBooks

Before exporting orders to QuickBooks several settings need to be entered in The SuperManager. These settings are located in two places. The program settings contain settings that apply to all SuperManager databases you work with in SuperManager. These settings are explained in section 7.7.e. The store settings apply only to the particular store database you have opened. These are explained in section 6.9.

11.1.c.1. Product Item Names

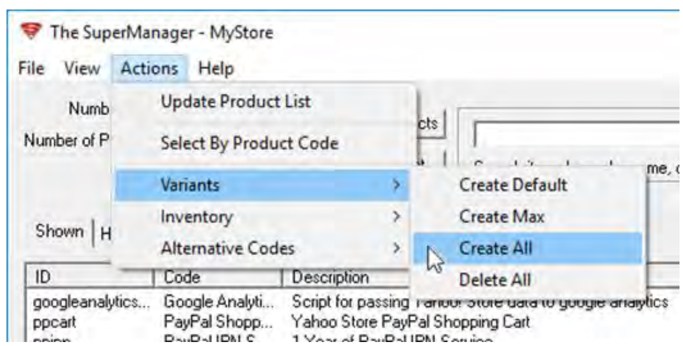
The SuperManager is able to handle different combinations of product options and can use existing items or create new items. Items can be created in batch from the products dialog or will be automatically created on the fly as an item name not existing in QuickBooks is encountered while exporting orders.

11.1.c.2. Matching Products with Existing QuickBooks Items

If you have many or all of your items already in your QuickBooks file you can setup The SuperManager to use these items rather than creating new ones. To do this you will need to create product variants for those products that already have a QuickBooks counterpart. Do this by following these steps:

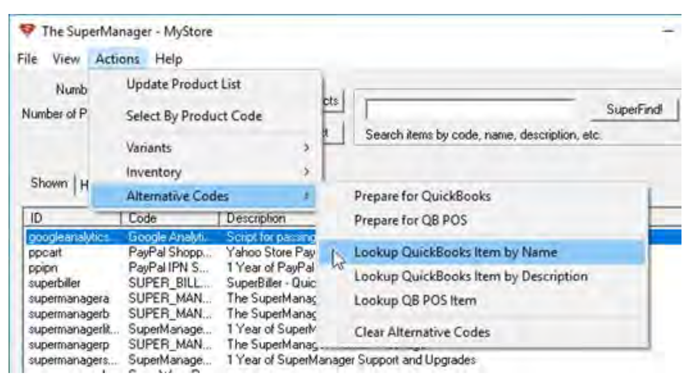
1. Go to the products dialog and select the product(s) that need to be matched with a QuickBooks item. Select multiple products by holding the ctrl key.

2. Choose "Actions", "Create All Variants" from the menu.

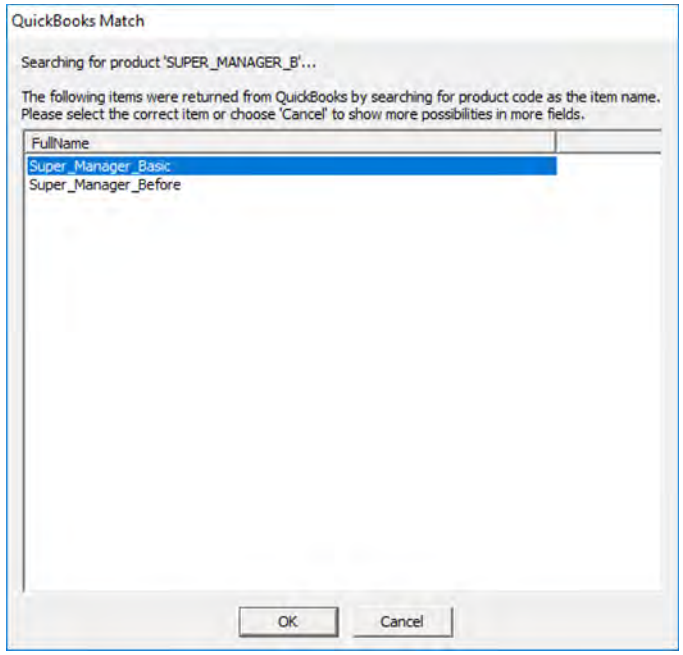


3. After creating all variants you can check that the variants are correct in the product details dialog. The variants are listed in a box at the bottom left corner of the dialog. For products without variants (as shown) there will just be one variant with the product code as the variant name. For products with options one variant will exist for each unique combination of the options.

4. Choose “Actions”, “Alternative Codes”, “Lookup QuickBooks Item by Name”. If that doesn’t work, you can also try “Lookup QuickBooks Item by Description”



5. For each option variant The SuperManager will search for a corresponding QuickBooks item. If there is more than one item name containing the product code the results of the query are shown in a list box as shown. Select the item to match the variant with and click OK. If SuperManager does not find the proper item this way, you can also try querying for the item based on description. This performs a alphanumeric comparison of the description of the product in SuperManager with each product in your QuickBooks file. A relevance score is calculated to help you identify the most likely matches.



6. If the correct product is not found by the query you will have to manually enter the full name of the QuickBooks item in the product details screen. Select the variant you are matching from the “Variants” list and enter the full name of the QuickBooks item in the “Alternative Code” box. If the item is a sub-item of another item the name should be entered in the form <*item name*>:<*sub-item name*>

Note: If you wish to not distinguish between the different option combinations for a product in exporting to QuickBooks you will need to either delete all variants from the product in The SuperManager and the item name in QuickBooks will have to match the product code or you will have to set the alternative code for each variant to the same value.

11.1.c.3. Creating New Items

As stated above The SuperManager will automatically create items for each product/variant that does not exist in QuickBooks as you export orders. They will be created with the SuperManager product code as the item name. For items with variants sub-items will be created for each variant.

Note: If you wish to have sub-items created for each variant of a product you will have to create the variants for the product as shown above. Otherwise The SuperManager will export all option combinations to the same item in QuickBooks.

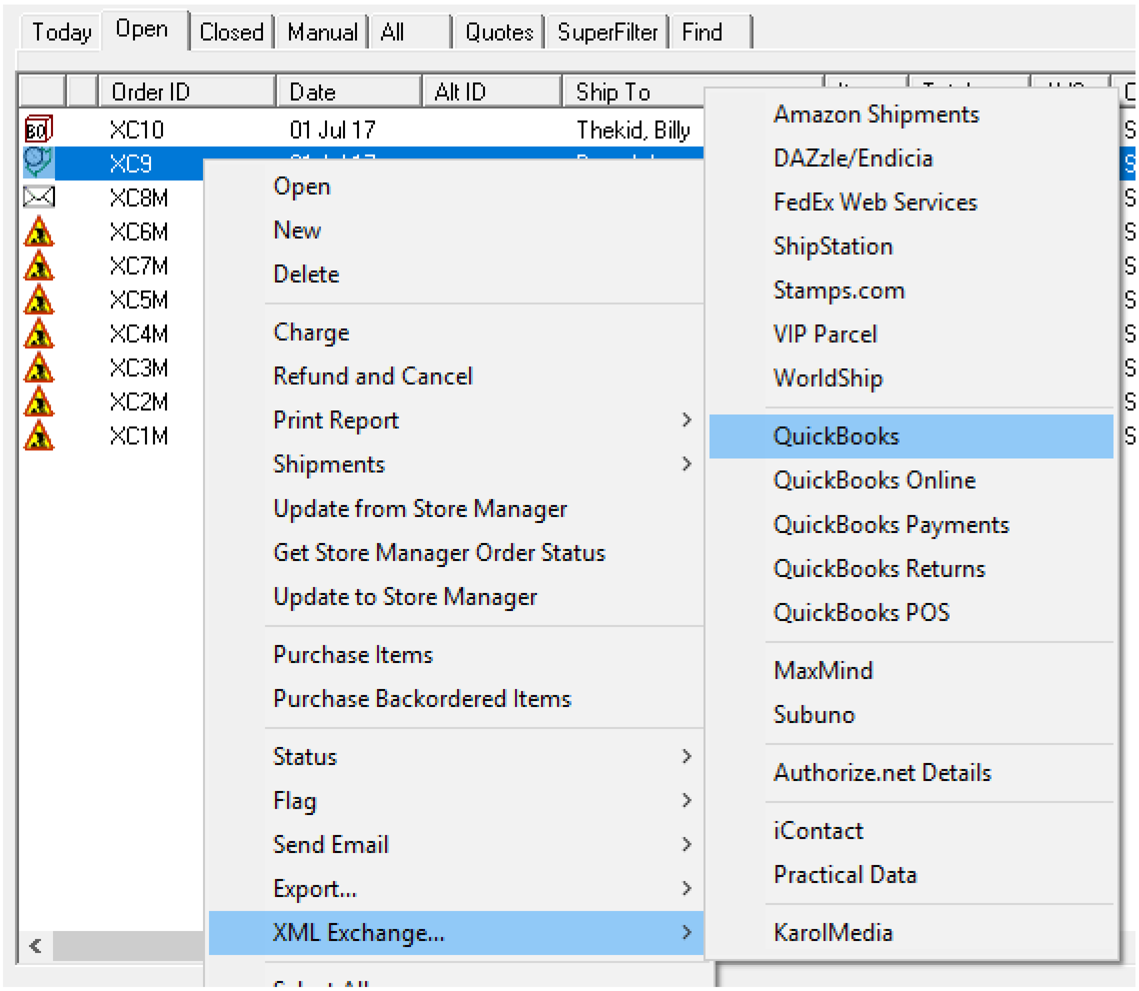
If you wish for the item to be created in QuickBooks with a name other than <*product code*>:<*variant*> enter the name you want to be used in the alternative codes box for the variant(s) before exporting the product to QuickBooks.

11.1.d Exporting Orders to QuickBooks

Before exporting orders to QuickBooks you should assure that the order is in the state you want it to be in for exporting. Refer to section 8.5.h for instructions on how to move orders from open to closed status. Note as well that if you have received more payment from your customer than the order has for the amount due the sales receipt/invoice will not be created for the order.

After all your settings are entered and your orders are prepared to export using the QuickBooks export is very simple. Just select the orders or products you want to export, right click and choose “XML Exchange”, “QuickBooks” from the dropdown menu. You can also set the orders action button to “Send to QuickBooks

Desktop" and click it or use the keyboard shortcut Alt-Q. Or, to export batches press the "Accounting Export" button and choose "QuickBooks" from the list. Your orders, products or batches will be exported. A log will appear reporting how the export went.



11.1.e Preparing to Export Batches to QuickBooks

Before exporting batches you need to make sure all the orders that had transactions in each batch you are exporting are in your SuperManager database. When SuperManager exports batches, it follows this process:

1. Tries to find each order referenced by that batch
2. Takes a ratio of the transaction amount to the order total
3. Multiplies each order total by that ratio (Taxable sales, Non-taxable sales, Shipping, Taxes, etc…)
4. Sums each total type, except for Taxable sales
5. The remaining amount received is allocated as taxable sales – this errs on the side of making sure that tax liability is overestimated rather than underestimated
6. Exports each total as a line item in the QuickBooks sales receipt

This approach is the best approach possible with the information available to SuperManager, but is not guaranteed to allocate the amounts received and credited to your customers 100% accurately. Specifically, there are a few things that can present problems when exporting batches:

- If the some of the orders in the batch are not in SuperManager
- If the batch entries are not named in a way that SuperManager can link them to an order
- If the amount due for any of the orders is not zero. To fix this, see section 8.5.h about moving orders from open to closed.
- If the order totals do not reflect the proper accounting of amounts due and amounts received from the customer

Since it is difficult to foresee some of these problems before exporting, SuperManager does a dry run through the process of creating the batch line items before actually exporting them to QuickBooks. If there are issues, it displays a list of errors and warnings. Common warnings and how to resolve them are shown in appendix 12.2.

11.2. QuickBooks Online

The SuperManager supports exporting orders to QuickBooks Online as invoices, sales receipts or estimates. Many of the settings for this are shared in common with those for QuickBooks desktop as described above. After entering account names, item names and other settings, simply right click on an order to upload to QuickBooks Online and choose “XML Exchange”, “QuickBooks Online”. SuperManager will check for necessary accounts and if one is encountered, prompt you to create it and click “Ok” to continue. It will then check for standard items and prompt for account names when creating them for you if they don’t exist. The process is fairly straight forward and automated.

11.3. QuickBooks Point of Sale

The SuperManager supports export of products and orders as sale receipts into QuickBooks Point of Sale.

11.3.a Setup for Exporting to QuickBooks POS

First, you will need to download and install a patch from Intuit that installs the necessary interfaces. This is available at

http://www.thesupermanager.com/download/redistributables/QBPOSFC1_1Installer.exe

In addition to this there several settings need to be entered in The SuperManager. These settings are located in two places. The program settings contain settings that apply to all SuperManager databases you work with in SuperManager. These settings are explained in section 0. The store settings apply only to the particular store database you have opened. These are on two separate tabs – “Tax Rates”, described in section 6.5 and “Accounting Export”, described in section 6.9.

A Note about Tax Rates: First you should verify that tax is being accessed the same way in The SuperManager as in POS. Secondly you need to put the “Name” on the “Tax Rates” tab for each Locale to the “Tax Code” in POS. When an order is exported SuperManager will figure out according to this prioritized list which tax locale should be applied. So for example if there were a zip code range preceding the item shown on the list above orders from this zip code range would have this tax rate applied even if they also happened to be from North Carolina. After determining which tax rate should be applied SuperManager looks for a “Tax Code” under the “Tax Location” provided above in POS. If a matching code is not found the export will end in an error.

After setting up these settings additional settings need to be made in your products. Each product has one or multiple “Alternative Code”. There will be one alternative code for each product variant (a unique combination of options). The POS field specified in the “Lookup POS Items Using” setting above must match the alternative code for the product variant in SuperManager. If the alternative code is left empty the POS field will be assumed to be the SuperManager product code. One of the major tasks of setting up SuperManager to properly export orders to POS will be ensuring that the alternative code matches the POS field you have specified.

11.3.b Using the QuickBooks POS Export

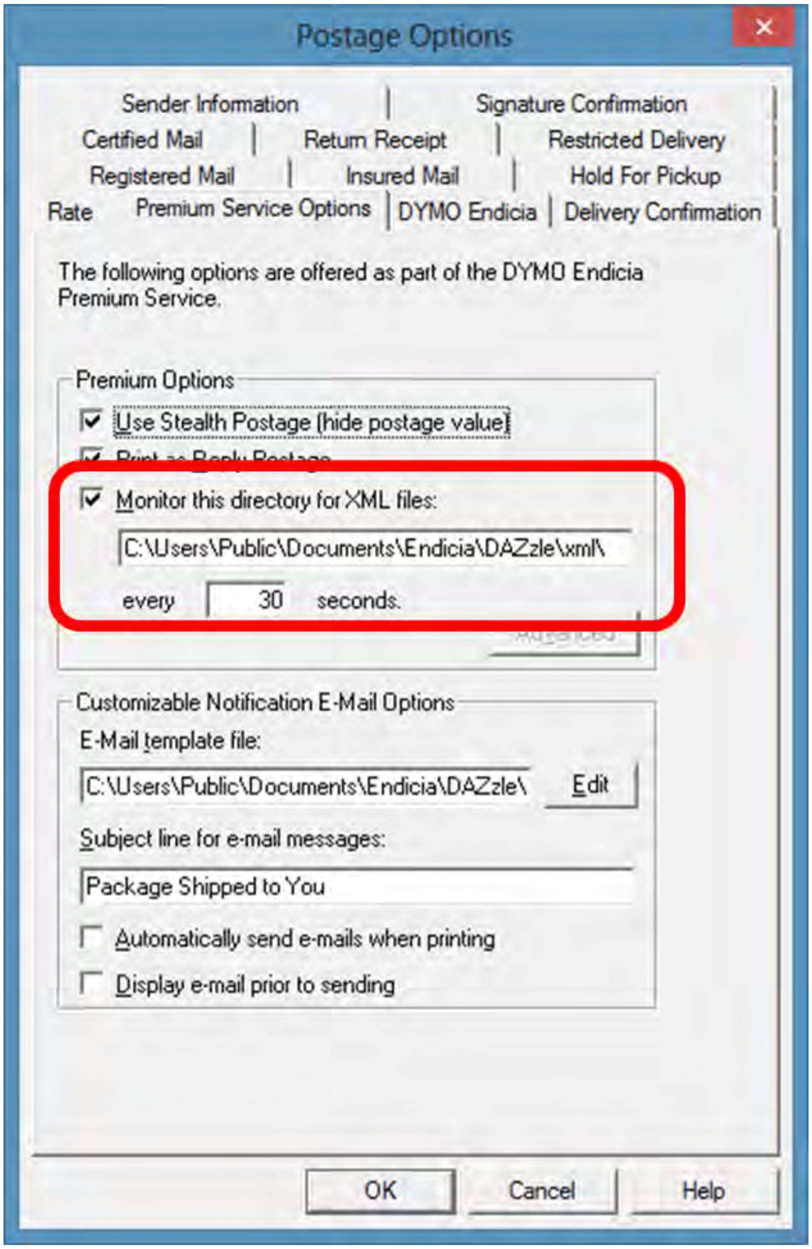
Once all these settings are correctly added to POS and SuperManager exporting orders is very simple. Just select the order or orders you wish to export from the SuperManager order list, right click and choose “XML Exchange”, “QuickBooks POS”. Note that QuickBooks POS will only accept orders that have been completely paid for. You will need to make sure that there are payment events in the order that document that the entire balance has been paid. Unpaid orders will result in an “Unbalance Receipt” error.

11.4. DAZzle

The SuperManager seamlessly integrates with DAZzle/Endicia using an XML interface requiring little or no user input. This is only available to DAZzle Premium subscribers. If you are not a DAZzle premium subscriber or the XML exchange interface does not met your needs you can also export information to and from DAZzle using text files as described in section 11.4.c.

11.4.a Preparing DAZzle for use with The SuperManager

Just a couple settings need to be adjusted in DAZzle to prepare it for receiving requests from SuperManager. Inside DAZzle click on “Postage Options” on the main toolbar. This should bring up a settings window. Select the “Premium Service Options” tab and enter the “Premium Options” as shown below.



Beyond that, the only thing that is required is to either instruct SuperManager to select a desired template that will work appropriately with the mail class you have selected, or open the template that you desire SuperManager to use before exporting to dazzle. See the DAZzle manual for information about compatibility of certain layouts with mail classes.

11.4.b Setup for Exporting to DAZzle

Only a few settings are required in order to set this up. These settings are described in section 7.7.a.

After entering these settings you will also need to follow the instructions in section 6.8.a for mapping your shipping methods.

11.4.c Using the DAZzle XML interface

Once the necessary settings are correct interfacing with DAZzle is seamless and simple as shown below.

1. Make sure each order you want to export has the proper number of shipments in it. Information on working with multiple shipments in an order is given in section 8.5.d.

2. Select the order(s) you want to send to dazzle from the order list.

3. Right click and choose "XML Exchange", "DAZzle/Endicia". You can also export to Dazzle using the "Actions" menu at the top of SuperManager. When using this menu you can choose from the following two options:

    a. Direct Print – The shipments in the orders you selected will be automatically printed and the tracking numbers will be imported.

    b. Print with Prompts – You will be given the opportunity to change details of each order in DAZzle.

When you select one of these options The SuperManager will write an XML file to the folder set up previously and wait for DAZzle to write a response xml to the Windows temp folder. When DAZzle finishes writing this response file The SuperManager will automatically import it and add the tracking numbers from the exported orders into The SuperManager. A log file will come up to show you the tracking numbers that were imported and any errors that were encountered in the process. After closing the log file a prompt will appear asking if you would like to send these shipment updates out. If you choose 'Yes' an email will be automatically sent to supported online stores. Keep in mind that each time this update is sent an email is sent to your customer explaining the status of the orders.

11.4.d Text Export to DAZzle / Endicia

If for some reason you are unable to use the xml interface as described above you can also use a text format to interface with DAZzle. After mapping your shipping classes as shown in section 6.8.a you can export shipment information to DAZzle using the following steps.

1. When The SuperManager is installed the settings are initialized with an export to DAZzle format. You can check to make sure this format is still in your program settings by going to "View", "Program Settings", then selecting the "Export Formats" tab. If you do not see a DAZzle/Endicia format on the list you can use the following instructions to restore the format:

    a. Download the file http://www.thesupermanager.com/download/smx/dazzle_endicia.smx

    b. Switch to the tab "Preferences" in the program settings.

    c. Click the "Import SMX…" button and select the file you have just downloaded.

    d. If you are prompted whether to overwrite an existing format choose "Yes".

2. Close the program settings by clicking "Ok" at the bottom of the dialog.

3. Select the order(s) you wish to export to DAZzle.

4. Right click on one of the orders that is highlighted and select "Export…", "DAZzle/Endicia". If you have changed the name of the export format select the name that you changed it to.

5. Choose a location to save the file and click "Save".

6. If there are multiple shipments in one or more of the orders selected you will be asked if it should export all shipments for the selected orders. If there are some shipments that are not ready to ship you should say "No". You will then be asked for each order with multiple shipments whether each of its shipments should be exported.

7. In DAZzle choose “File”, “Import” and select the file you just saved in The SuperManager.

11.4.e Text Import from DAZzle / Endicia

After printing postage in DAZzle/Endicia you can export the tracking numbers on the items you have shipped using the following steps:

1. In DAZzle/Endicia and click "Postage" and then "Postage Log".
2. Click the "Backup/Export" button and then click the "Export" radio button and click "OK"
3. Enter the start and end date and then click "Export"
4. In the file save dialog, change the "Save as type" dropdown menu to "Text, tab-delimited".
5. Enter a filename and then click "Save", noting the location of the file.
6. In the SuperManager, click “Program Settings…” and go to the “Import Formats” tab.
7. Check to see if there is already a text import format for DAZzle/Endicia defined. One is created in your settings by default when The SuperManager is installed. If you do not have an import for dazzle already you can follow these steps to restore it:
    a. Download the file http://www.thesupermanager.com/download/smx/dazzle_endicia.smx
    b. Switch to the tab “Preferences” in the program settings.
    c. Click the “Import SMX…” button and select the file you have just downloaded.
    d. If you are prompted whether to overwrite an existing format choose “Yes”.
8. Close the program settings by clicking “Ok” on the bottom of the dialog.
9. From the main SuperManager window select "File”, "Import“, “DAZzle/Endicia" If you have changed the name of the import format select the name that you changed it to.
10. Select the file in the browse window that you exported in steps 4-5.
11. Click "Open" and the tracking id's will be imported for the dates you specified in step 3.

11.5. UPS WorldShip

The SuperManager interfaces with UPS WorldShip 10 and higher via the XML Auto-Import feature and via OBDC (text database) connection for all versions of WorldShip. The XML feature requires much less setup and is generally much easier to use than the ODBC connection.

11.5.a Using the UPS WorldShip Interface

Before exporting orders to UPS WorldShip the first time it is necessary to populate the settings described in section 7.7.j.

After entering these settings you will also need to follow the instructions in section 6.8.a for mapping your shipping methods and section 6.8.f for mapping your package types.

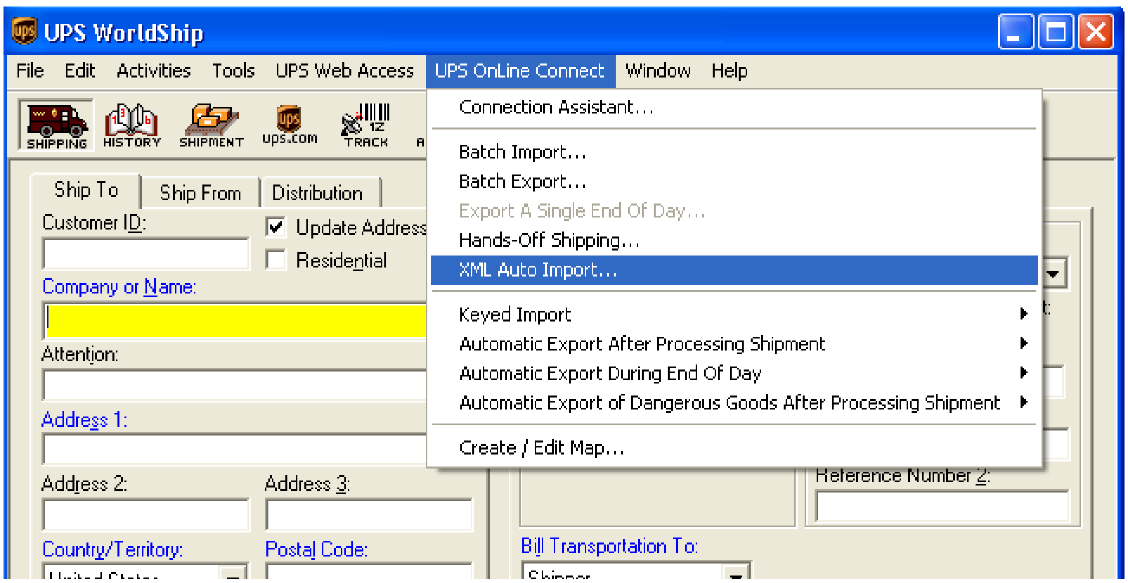
Once the necessary settings are correct interfacing with WorldShip is seamless and simple as shown below.

1. Make sure each order you want to export has the proper number of shipments in it. Information on working with multiple shipments in an order is given in section 8.5.d.

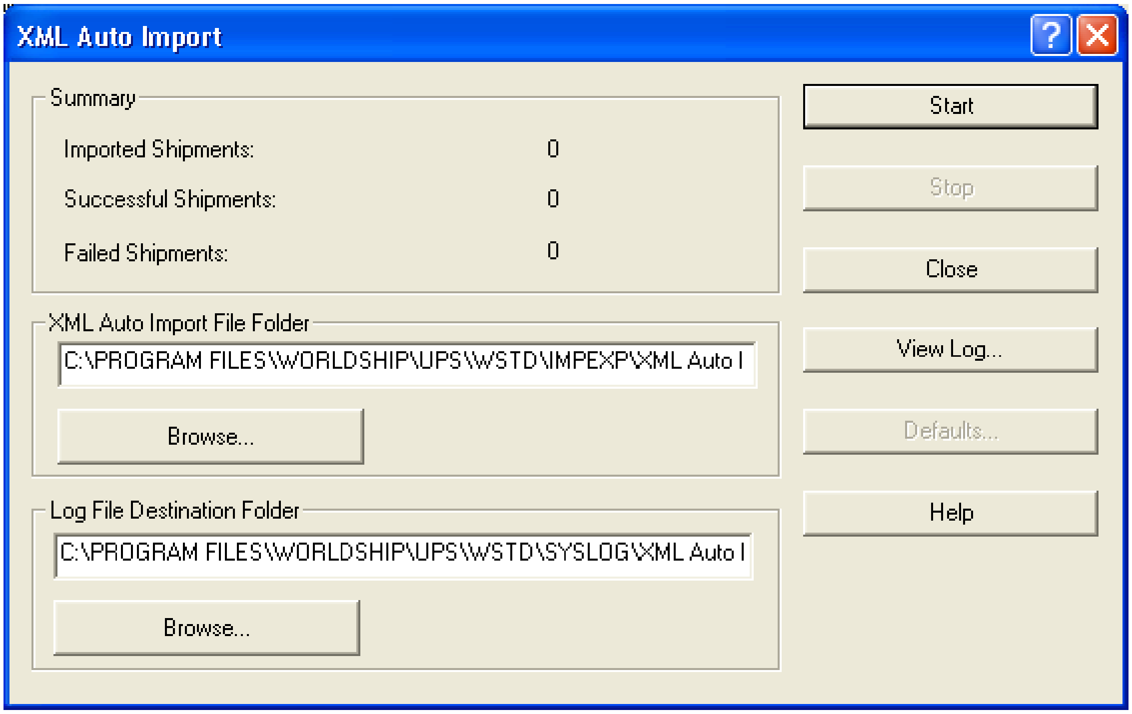
2. Select the order(s) you want to send to UPS WorldShip from the order list.

3. Right click and choose “XML Exchange”, “WorldShip” and either “Direct Print” or “Print with prompts

When you select this The SuperManager will write an XML file to the folder set up previously. A message box will appear stating that shipments have been exported. Do not press ‘OK’ to this message until after WorldShip is finished processing the shipments. If WorldShip is not opened open it and go to “UPS OnLine Connect”, “XML Auto Import…”



This will bring up the screen shown below. Make sure that the “XML Auto Import File Folder” is set to the folder that the file in The SuperManager program settings as described in section 0. This same folder should be specified in the “Log File Destination Folder. Once checking these settings press the “Start” button.



UPS should find the file written by The SuperManager and begin processing the shipments in it. WorldShip will then write a response file that The SuperManager will read and add the tracking numbers from the exported orders into The SuperManager. Once all shipments have been processed in WorldShip go back to The SuperManager and click 'OK' to allow it to proceed with this. A log file will come up to show you the tracking numbers that were imported and any errors that were encountered in the process. After closing the log file a prompt will appear asking if you would like to send these shipment updates out. If you choose 'Yes' tracking numbers will be automatically sent to supported online stores for the selected orders. Keep in mind that each time this update is sent, some store platforms send an email to your customer explaining the status of the orders.

11.5.b Connecting to UPS WorldShip Via an ODBC Connection

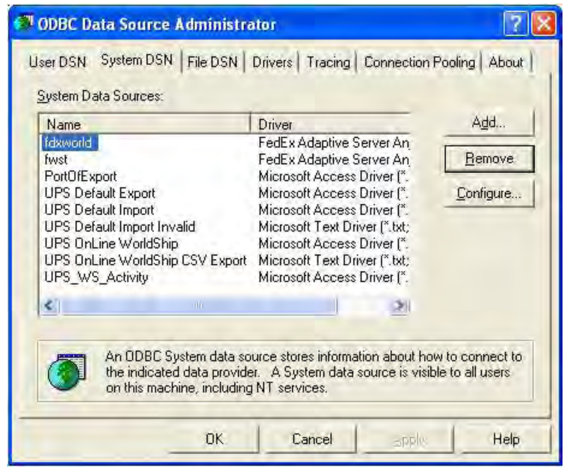
First you will need to create an ODBC database to make a connection with UPS WorldShip to use for the export from The SuperManager. Then you will need to create an import map in UPS WorldShip to import the information and finally you will need to create an export map in UPS WorldShip to export the data from UPS WorldShip for importing into The SuperManager. Once you have created the interfaces you will be able to work directly with UPS WorldShip to transfer data and you will save a significant amount of time in your daily work.

You can download and run the spreadsheet http://www.thesupermanager.com/download/odbc/ups/create_odbc_dsn_ups.xls to create the UPS WorldShip Connection or follow the instructions below to set it up manually. If you use the excel spreadsheet skip to the section "Create an import map in UPS WorldShip to import shipments".

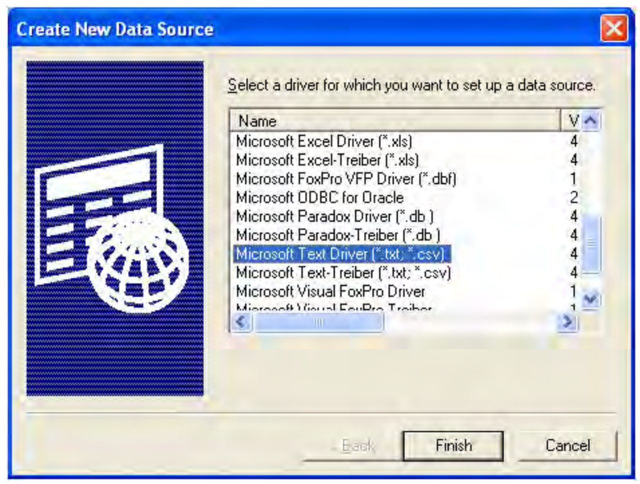
11.5.b.1. Create an Open Database Connection (ODBC) to interface with UPS WorldShip

1. First, click "Start", then "Settings" then "Control Panel". Once the "Control Panel" has opened, double click "Data Sources (ODBC)" to open the "ODBC Data Source Administrator" dialog or double click the "Administrative Tools" icon and then double click the "Data Sources" icon to open the "ODBC DS Admin" dialog.

2. Next, click the "System DNS" tab at the top of the "ODBC" dialog and then click the "Add…" button.



3. Now select "Microsoft Text Driver (*.csv, *.txt)" from the option list and then click "Finish"



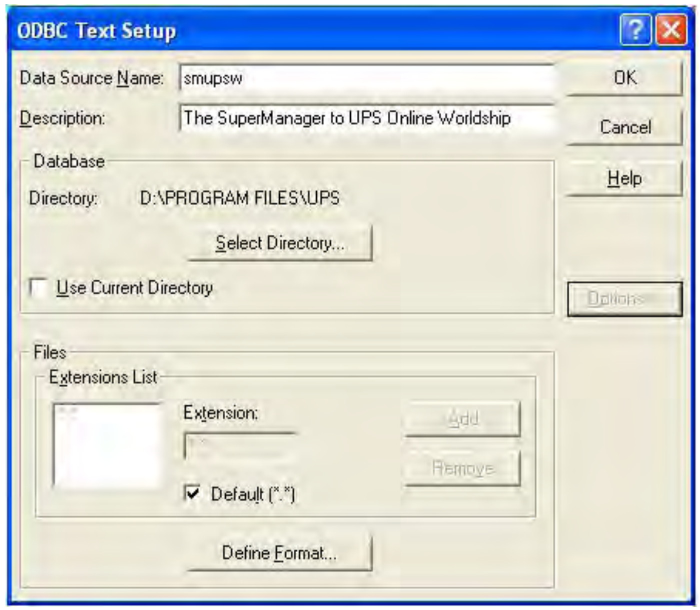
4. Download the following file: http://www.thesupermanager.com/download/odbc/ups/smupsw.txt and save it to the directory "C:\Program Files\UPS\" (or to the directory where your UPS program is located.

*Note - The file to be downloaded is a predefined header file that you can use with UPS WorldShip shipment imports and is to be used in conjunction with the predefined UPS Export format in The SuperManager. You can setup your own export formats in The SuperManager and use them for any type of export. (See section 7.2)

5. In the “ODBC Text Setup” dialog, enter "smupsw" in the "Data Source Name" and then enter a description, e.g. "The SuperManager to UPS Online Worldship”, in the "Description" edit box.

6. Next, click the "Use Current Directory" checkbox at the bottom left of the dialog and then click the "Select Directory…" button and browse to the directory "C:\Program Files\UPS\" (or to the directory where your UPS program is located) and then click "OK".

7. Now click the "Options>>" button at the bottom right of the "ODBC Text Setup" dialog and then click the "Define Format" button at the bottom of the dialog.

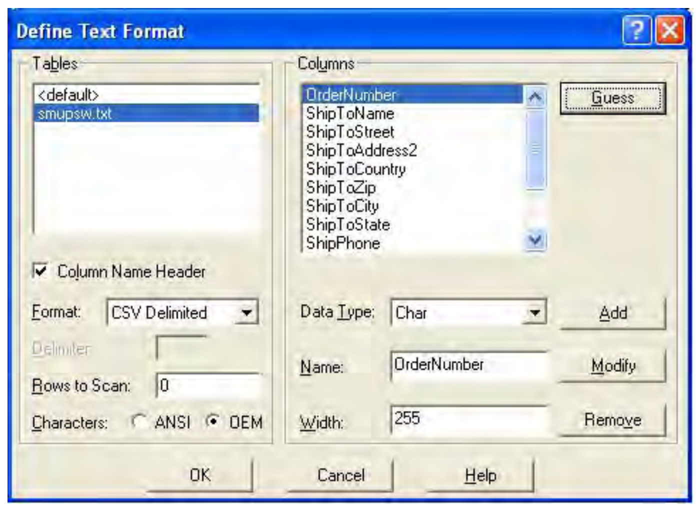


8. Now select the "smupsw.txt" file under the "Tables" tab and then click the "Column Name Header" check box and then change the Format to "CSV Delimited" if this option is available for you.

9. Next, click the "Guess" button to import the header names into the database connection.

10. Now click "OK" to close the "Define Text Format" Dialog. (You should ignore the following error if Windows displays it - "Failed to save table (null) to (null)")

11. Next, click "OK" to close the "ODBC Data Source Administrator" dialog."ODBC Data Source Administrator" dialog."ODBC "ODBC Data Source Administrator" dialog.Data Source Administrator""ODBC Data Source Administrator" dialog."ODBC Data Source Administrator" dialog."ODBC Data Source Administrator" dialog. Dialog and then close the "Control Panel" dialog.

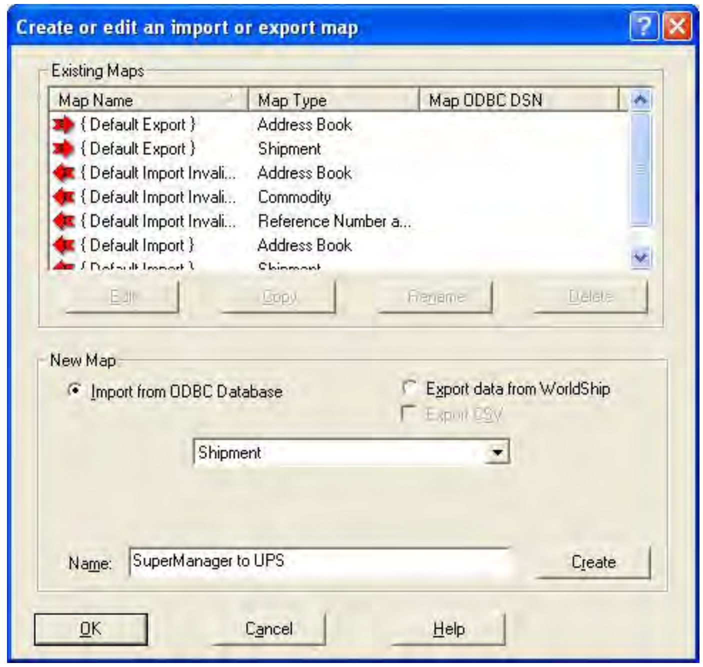


11.5.b.2. Create an import map in UPS WorldShip to import shipments

1. First, open the UPS WorldShip program and then click the "UPS OnLine Connect" menu at the top of the dialog and then select the "Create / Edit Map" menu item.

2. Next, click the "Import from ODBC Database" radio button and then select "Shipment" from the dropdown menu to indicate this import method is to be use for importing shipments.

3. Next, enter a descriptive name in the "Name" edit box and then click the "Create" button.



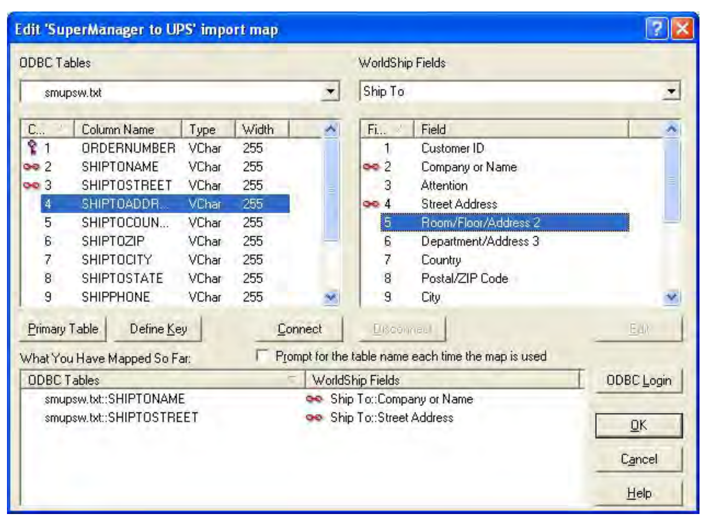
4. Now select the "smupsw" ODBC source from the list and then click "OK".

5. To begin mapping the ODBC to your UPS WorldShip import, you will need to define the Primary Key. Select the " CUSTOMERID" field under the "Column Name" heading and then click the "Define Key" button.

6. Next, you will need to map all of the variables on the left to the correct UPS variables on the right. Use the table below to “connect” or map the variables.

Begin by selecting the SuperManager variable on the left and then select the appropriate UPS variable on the right.

Then click “Connect” to create the connection. You will need to change the drop down menu under the “WorldShip Fields” label to select the different UPS WorldShip tables.



8. Now click "OK" to close the dialog and then click "OK" again to close the "Create or edit and import or export map" dialog.

11.5.b.3. Create an export map in UPS WorldShip to export shipments

1. First, open the UPS WorldShip program and then click the "UPS OnLine Connect" menu at the top of the dialog and then select the "Create / Edit Map" menu item.

2. Next, click the "Export data from WorldShip" radio button and check the "Export CSV" checkbox and then select "Shipment" from the drop down menu to indicate this export method is to be used for exporting shipments.

3. Next, enter a descriptive name ("UPS WorldShip to The SuperManager" in the "Name" edit box and then click the "Create" button.

4. Select the "Ship To" tab and click "Reference ID" and then click the "Add" button. Next, click the "Package" tab and click "Tracking Number" and then click the "Add" button. Next, click the "Shipment Information" tab and click "Pick Up Date" and then click the "Add" button. The pre-defined UPS import in The SuperManager is setup for these three import variables but you can create your own custom import formats to handle any parameters (See section 7.6, Import Formats, and section 12.1, The SuperManager Variable List, for all the possible variables to import back into The SuperManager)

5. Click the "Overwrite existing file" checkbox.

6. Next, click the "Define CSV File Name" button and specify a location for your file and then click "Save". This is the file you will select in The SuperManager to import your shipment information.

7. Now click "OK" to close the Export to CSV dialog and then click "OK" again to close the Map dialog.

11.5.b.4. Export to UPS WorldShip via the ODBC Connection

After you have mapped your online store shipping methods to the UPS shipping methods (See section 6.8.a) and once you have setup the database connection (See section 11.5), you can export orders to UPS OnLine WorldShip to print postage.

1. First, enter the order/shipment weights as described in section 7.0.

2. Next, right click on the selected order(s) again and click "Export", then "UPS". You should save the file to your UPS OnLine WorldShip program directory or the same directory used in section 11.5.

3. Next, open UPS OnLine WorldShip and click "Online Connect" and then click "Batch Import". Select the map you created in section 11.5 and then click "Process shipments automatically after import" and then click "Next" and follow the instructions to print UPS postage labels.

*Note - The method described above is recommended as the ideal way to automate your UPS postage label printing with The SuperManager. There are multiple ways to import data into UPS OnLine WorldShip. Refer to the UPS OnLine WorldShip user's manual for more information about importing data into UPS OnLine WorldShip to print postage (see "Keyed Import" and "Batch Import" in the UPS OnLine WorldShip help documentation)

11.5.c Text Import from UPS WorldShip

After you have printed postage in UPS OnLine WorldShip, you can import the postage information back into The SuperManager to send to customers or to send back to supported online stores.

1. First, in "UPS OnLine WorldShip", click "OnLine Connect and then "Batch Export". Select the UPS export map you created in section 11.5 and follow the instructions to export the data.

2. Next, in The SuperManager, click "File" then "Import" and select the "UPS" import format. The shipping information will be imported in The SuperManager.

11.6. FedEx

SuperManager can interface with FedEx either directly through their Web Services or using their Ship Manager desktop software. Generally, obtaining Web Services credentials will allow for more robust creation of shipping labels.

11.6.a Setup FedEx Web Services Connection

Before integrating with FedEx Web Services it is necessary to obtain credentials. This is done using the following steps:

1. Go to the FedEx Developer Resource Center (DRC) at www.fedex.com/developer and log in with your regular FedEx.com username and password. If you don't have one then click on the "Register Now" link. Fill out the form for your DRC username and password. You will be asked to click through a DRC End User License Agreement.

2. Click on the link “Get Started with Web Services for Shipping”.

3. Click on the link “Technical Resources” from the Left Navigation area of the screen.

4. Click on the link “FedEx Web Services for Shipping” from the Left Navigation area of the screen.

5. Click on the link “Develop and Test Your Application” from the Left Navigation area of the screen.

6. Click on the “Obtain Developer Test Key” icon near the bottom of the page.

7. Complete the short form, agree to the terms and conditions and finish the process.

8. Be sure to copy, print or write down the information provided on the Confirmation Screen since the key will not be provided to you in any other way.

9. You will receive an email with the Account Number, Meter Number and Password. Put these credentials along with the key in the program settings as shown in section 7.7.b and enable the “Test print” option. While still in the program settings, set the paper type you will be using for shipping labels and on the “Preferences” tab, set the “Label Printer” to the proper printer installed on your computer.

10. Call the FedEx Help Desk at (877) 339-2774 and when asked for why you called say “API”. When you are directed to a customer service representative, tell them that you have to go through the label evaluation process for approving your web services integration.

11. They should send you a label coversheet with instructions on how to verify the labels produced by SuperManager will work correctly. In brief, you will have to create a set of test labels for each service type (ex: First Overnight, Overnight Standard, etc…) and service option (ex: Signature Required, Insured, etc…) you intend to use. With the test print option enabled, the test labels will not be billed to your account. They will be understood as for test purposes only. Please note that you may need to adjust the margins for your label printer on the “Preferences” tab of the program settings.

12. After certifying your labels, you will go back to www.fedex.com/developer and click on “Move to Production”. This will give you a new set of credentials to enter into the program settings in SuperManager.

11.6.b Export to FedEx Web Services

After putting your Web Services credentials into SuperManager, you can export to FedEx Web Services in a couple different ways:

- Select the orders with shipments you want to create on the order list, right click and choose “XML Exchange”, “FedEx Web Services”
- Similarly you can choose “Actions”, “XML Exchange”, FedEx Web Services”. From this menu you can also choose “Cancel Shipment” to cancel a shipment that has been created through SuperManager. You can also choose “Close Day” to close the queue of FedEx Ground shipments created since the last close. This is required before handing any ground shipments over to FedEx.
- You can also press the “FedEx” button on the shipment details screen. See section 8.5.d.

11.6.c Setup FedEx Ship Manager Connection

If there is some reason that direct integration to FedEx via Web Services is not ideal, you can also use the Export and Import functions to send and retrieve information from FedEx Ship Manager. This feature will automate your FedEx postage printing process and reduce your overall order processing time. To use this feature, you will need to first set up the connection between The SuperManager and FedEx Ship Manager.

First you will need to create an import template in FedEx Ship Manager to specify what you will be importing. Then you will need to create an export template in FedEx Ship Manager to specify what you will be exporting for import into The SuperManager. Once you have created the interfaces you will be able to work directly with FedEx Ship Manager to transfer data and you will save a significant amount of time in your daily work.

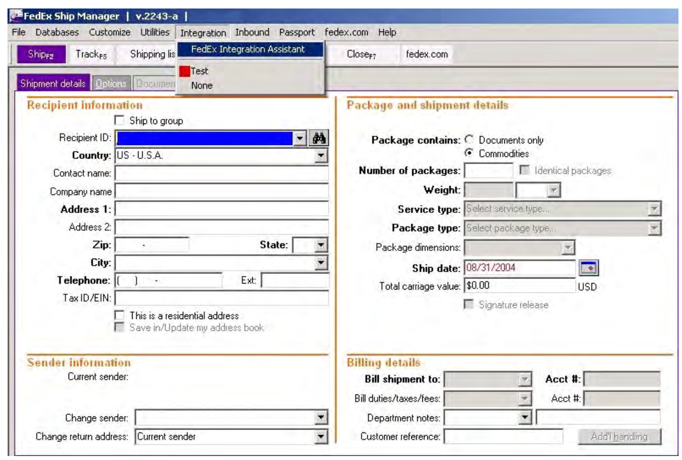
Follow the instructions below to setup the FedEx Ship Manager Connection

11.6.c.1. Create an Import Template in FedEx Ship Manager Software

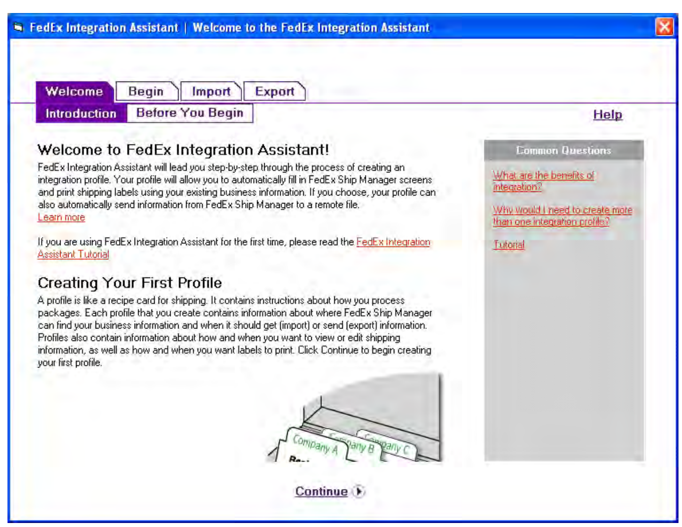
The first step in importing or exporting data is creating or selecting a template. The recipient data fields in your import template must be displayed in the same order as the columns in your export file from The SuperManager. A FedEx Ship Manager export format has been included in the basic installation of The SuperManager but you can create new export formats as desired (See section 7.2, Export Formats).

1. In SuperManager, right click on an order that would be ready to export to FedEx and choose “Export”, “FedEx Ship Manager”. Save the file in the location where you would typically want to have the files to and from Ship Manager located. A good location would be “Documents\SuperManager\FedEx”. A good filename would be sm2fedex.txt.

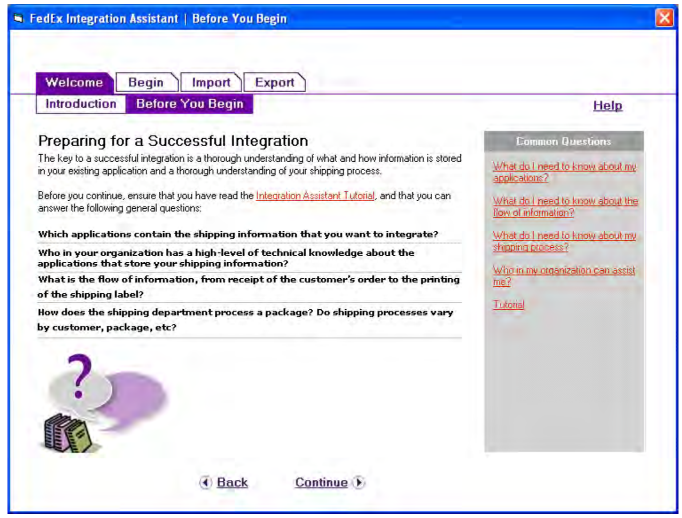
2. Launch FedEx Ship Manager Software and choose “Integration”, “FedEx Integration Assistant” from the main menu.



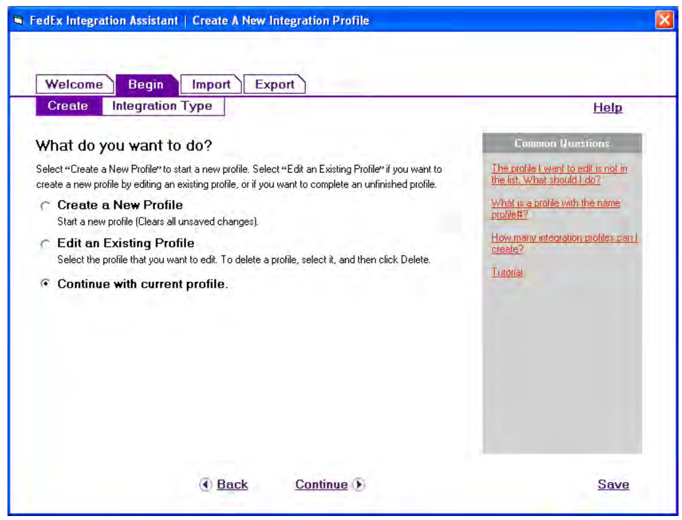
3. At the Welcome->Introduction screen, click Continue



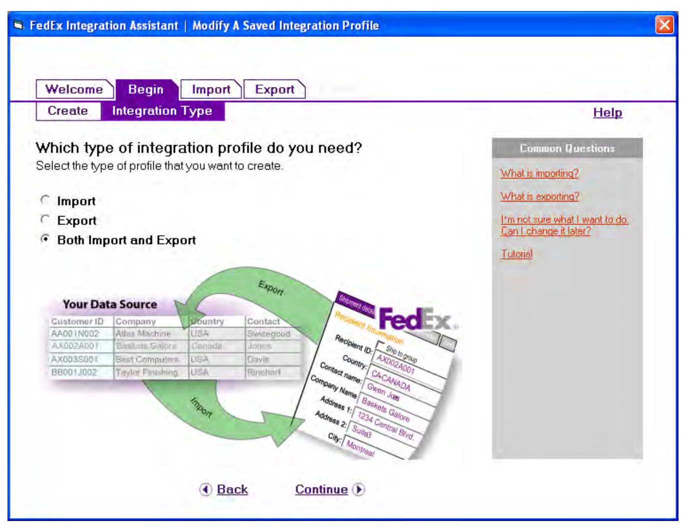
4. At the Welcome>Before You Begin screen click Continue



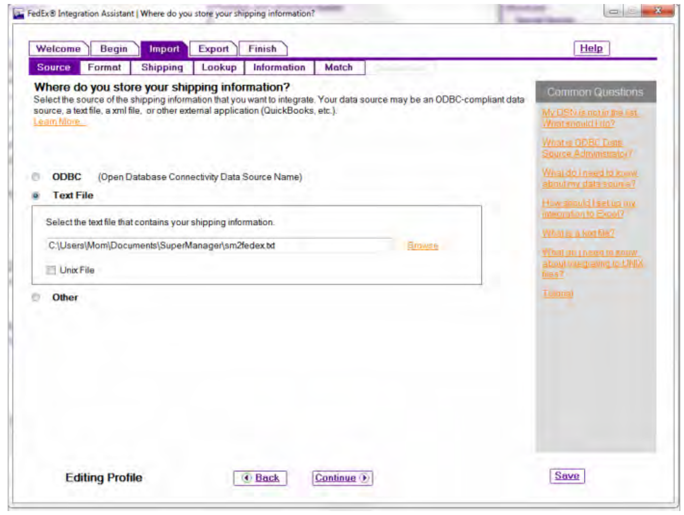
5. At the Begin>Create screen check "Create a New Profile" and then click "Continue"



6. At the Begin>Integration Type screen choose "Both Import and Export" then click Continue

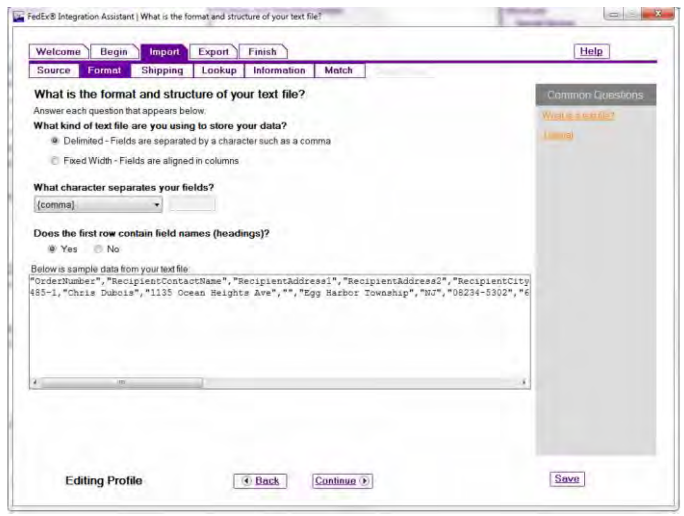


7. At the Import>Source screen, select "Text File". Next, click “Browse” and choose the file saved in step 1.



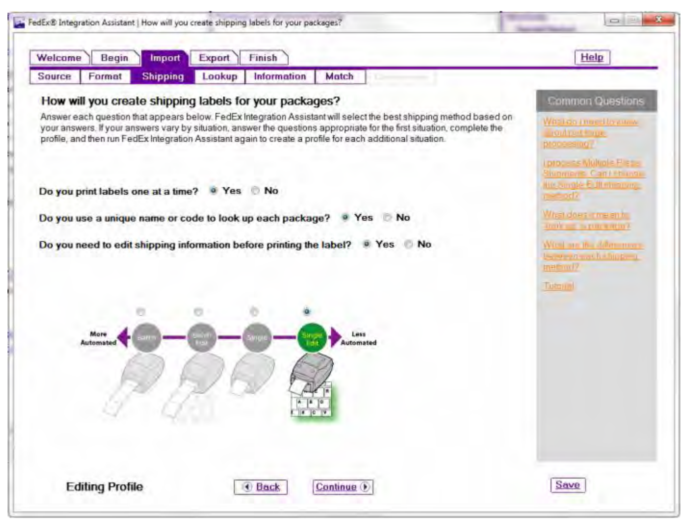
8. At the Import>Format screen, enter the following:

- Set "..format and structure of your text file?" to Delimited
- Set "..character .." to {comma}
- Set "..first row of the text file contain headings?" to Yes



9. At the Import>Shipping screen we recommend the following:

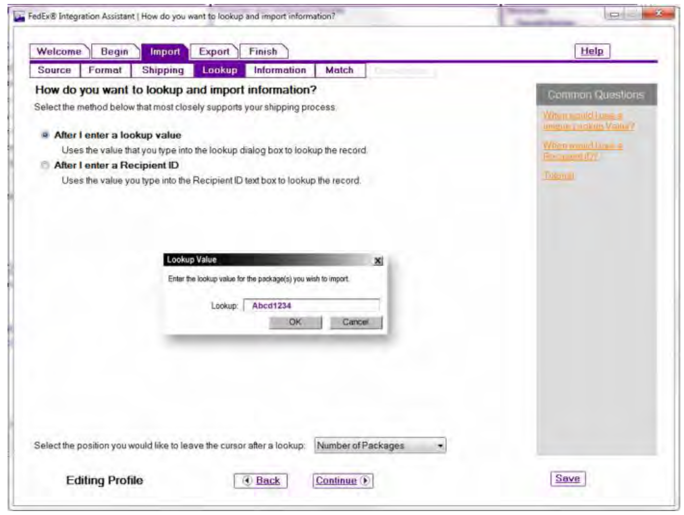
- Set "Do you print Labels one at a time?" to Yes
- Set "Do you use a unique name or code to look up each package?" to Yes
- Set "Do you need to edit shipping information before printing the label?" to Yes



Then click Continue

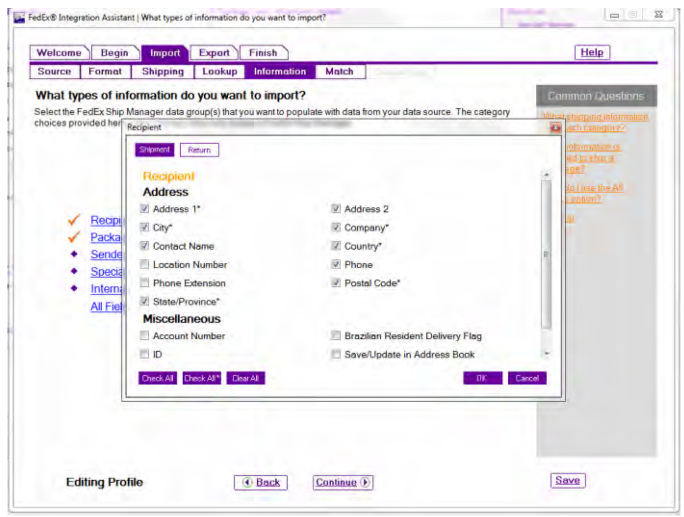
Note - You can edit these settings at a later time if you wish to import shipments into FedEx as batches for batch printing.

10. At the Import>Lookup screen select "After I enter a Package Reference" then click Continue



11. Click on the word "Recipient" to open the field list window. Select the following fields:

- Address 1
- Address 2
- City
- Company
- Contact Name
- Country
- Phone
- Postal Code
- State/Province

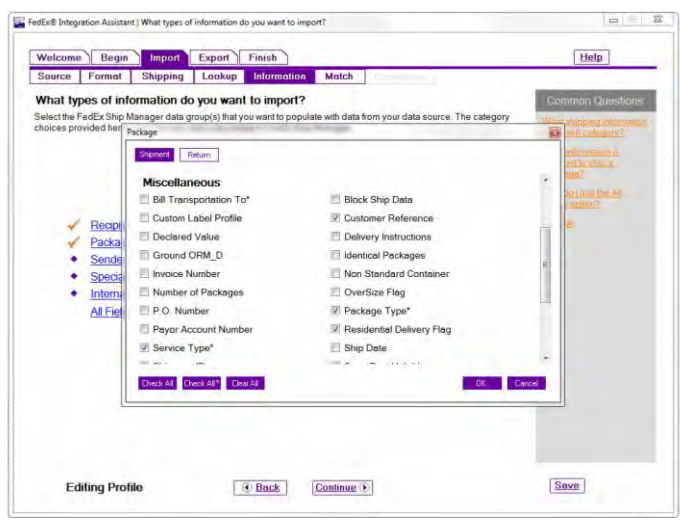


Click OK

12. At the Import>Information screen perform the following:

Click on the word "Package" to open the field list window. Select the following fields:

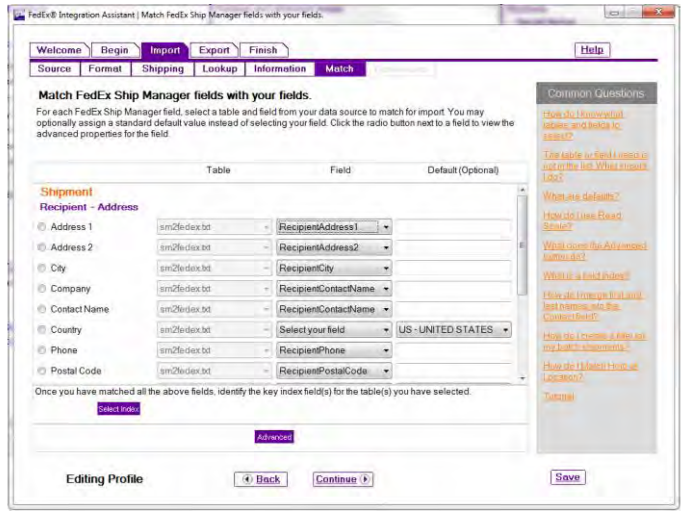
- Weight
- Length
- Width
- Height
- Customer Reference
- Package Type
- Residential Delivery Flag
- Service Type



Click OK

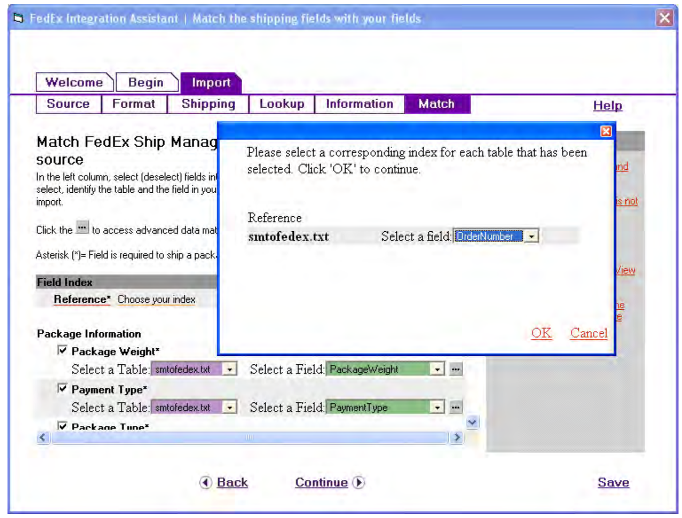
13. Click Continue

14. At the Import>Match screen set up the following Field Mapping



Shipment Recipient - Address		Field
	Address 1	RecipientAddress1
	Address 2	RecipientAddress2
	City	RecipientCity
	Company	RecipientCompany
	Contact Name	RecipientContactName
	Country	RecipientCountry
	Phone	RecipientPhone
	Postal Code	RecipientPostalCode
	State/Province	RecipientState
Package - Dimensions		
	Height	PackageHeight
	Length	PackageLength
	Width	PackageWidth
Package - Miscellaneous		
	Customer Reference	OrderNumber
	Package Type	PackageType
	Recipient Email	RecipientEmail
	Residential Delivery Flag	ResidentialDeliveryFlag
	Service Type	ServiceType
	Weight	PackageWeight

15. Click on the Continue button. You will be prompted to select an index for the sm2fedex.txt table. Select "OrderNumber" from the Drop-down list and click OK



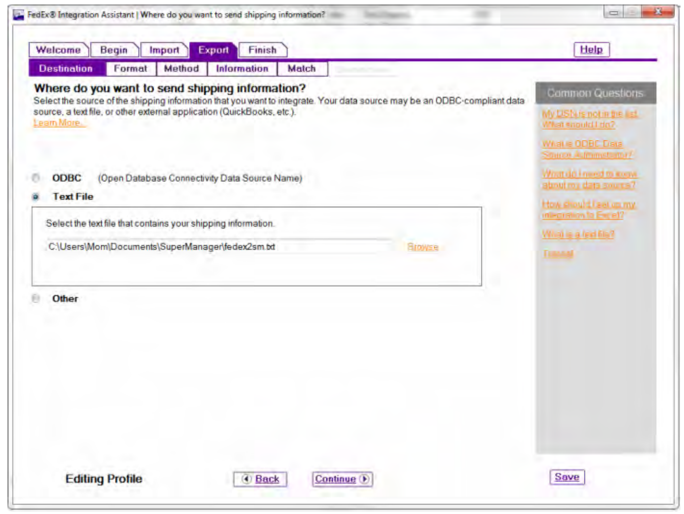
Congratulations, you have completed setting up the import settings for the FedEx connection! Continue below to setup the export settings for the FedEx connection.

11.6.c.2. Create an Export Template in FedEx Ship Manager Software

You will now need to create a template export text file.

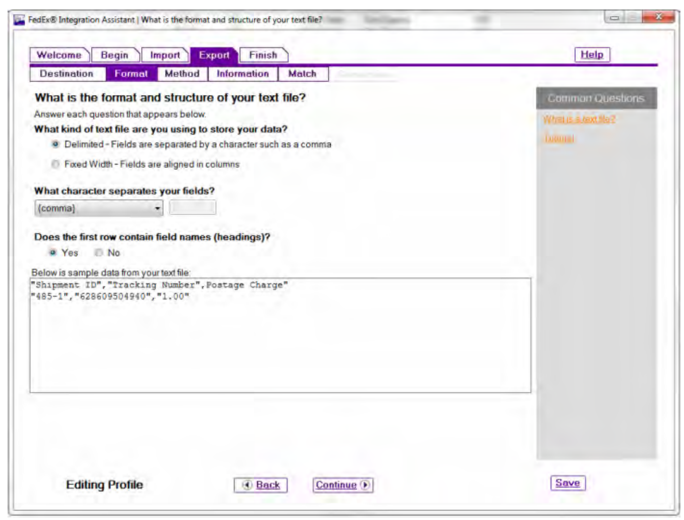
1. Open Windows Notepad text editor. On the first line, enter "order number, tracking number" (without the quotes), and then save the file to the same location where you have stored your "smtofedex.txt" file. Enter the filename "fedextosm.txt" and then click "Save". Now close notepad and switch back to the FedEx integration assistant.

2. At the Export>Destination screen select "Text File" and then click "Browse" and select the file "fedextosm.txt" that you just created in the step above.



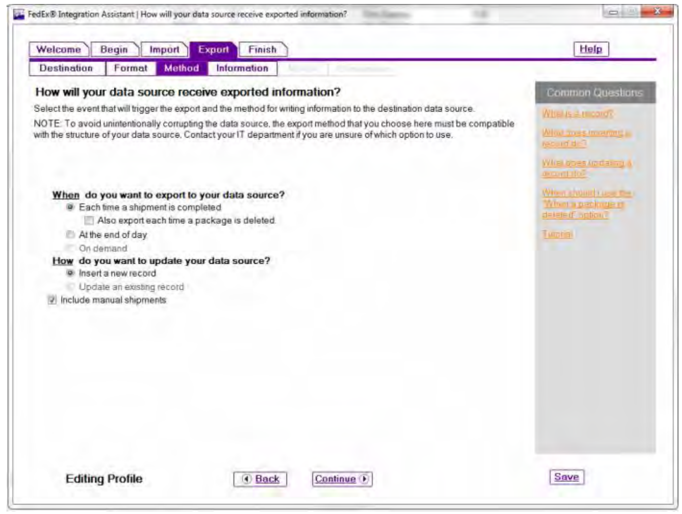
3. At the Export>Format screen, enter the following:

- Set "..format and structure of your text file?" to Delimited
- Set "..character .." to {comma}
- Set "..first row of the text file contain headings?" to No



4. At the Export>Method screen select "Each time a shipment is completed" and "Insert a new record"

Note - You can change these settings at any time if you prefer to export shipping information at the end of the day.



5. At the Export>Information screen perform the following:

Click on the word "Package" to open the field list window. Select the following fields:

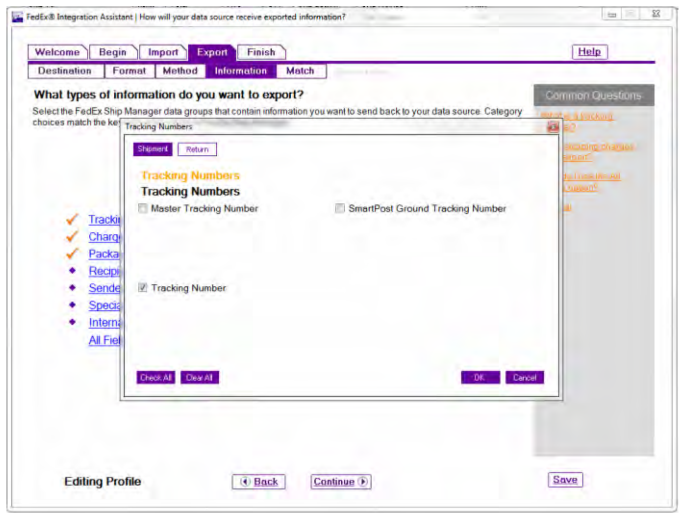
- Customer Reference

Click on the word "Tracking Number" to open the field list window. Select the following field:

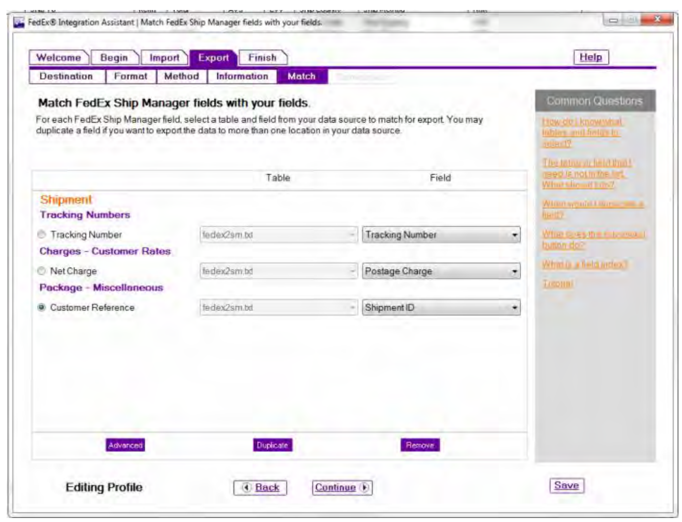
- Tracking Number

Click on the word “Charges” to open the field list window. Select the following field:

- Net Charge

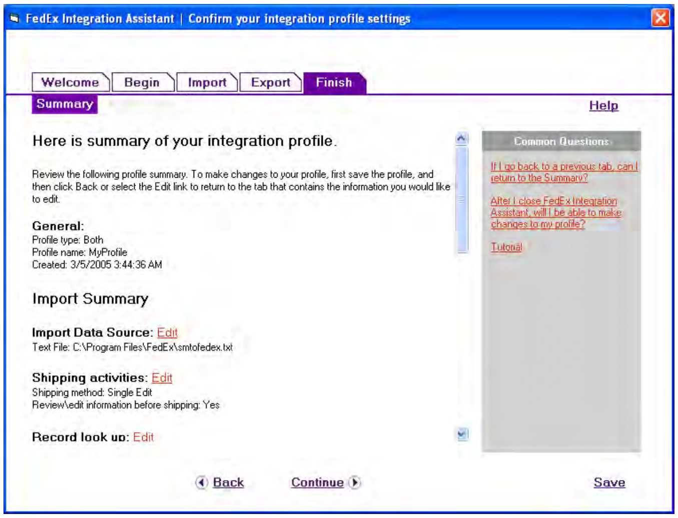


6. At the Export>Match screen set up the following mapping:

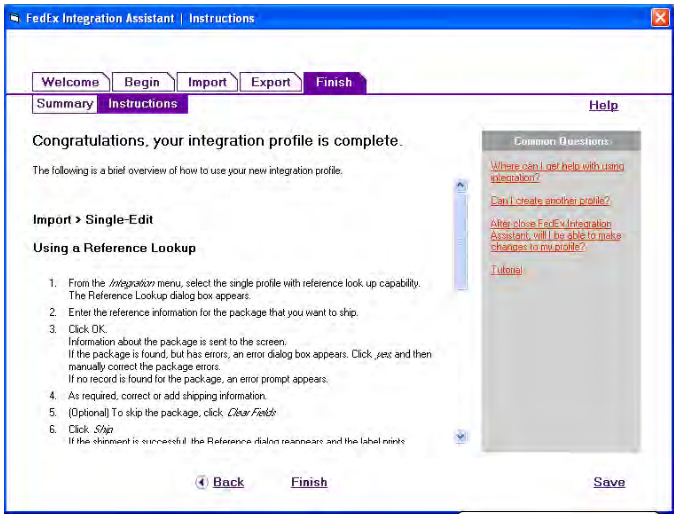


7. Click Continue

8. At the Finish>Summary screen click Continue



9. At the Finish>Instructions screen click Finish. You will be prompted to save your new profile under a name you specify. Name the profile "SuperManager" to make it easy to remember, then click OK



11.6.d Exporting to FedEx Ship Manager

After you have mapped your ship methods and package types to the FedEx shipping methods (See section 6.8) and once you have setup the FedEx connection(See section 11.6.b), you can export orders to FedEx Ship Manager to print postage.

1. First, enter the order/shipment weights as described in section 7.0 in The SuperManager.
2. Next, right click on the selected order(s) and click "Export", then "FedEx". You should save the file to your FedEx Ship Manager program directory.
3. Start FedEx Ship Manager
4. Click on the Integration Menu
5. Select the Profile created in the previous steps (named SuperManager).
6. You will be prompted with a Reference Lookup window.

7. Enter the SuperManager's Order Number for an order that is approved, then press Enter.

Next, in The SuperManager, click "File" then "Import" and select the "FedEx" import format. The shipping information will be imported in The SuperManager.

11.7. Stamps.com

11.7.a Setup Stamps.com Connection

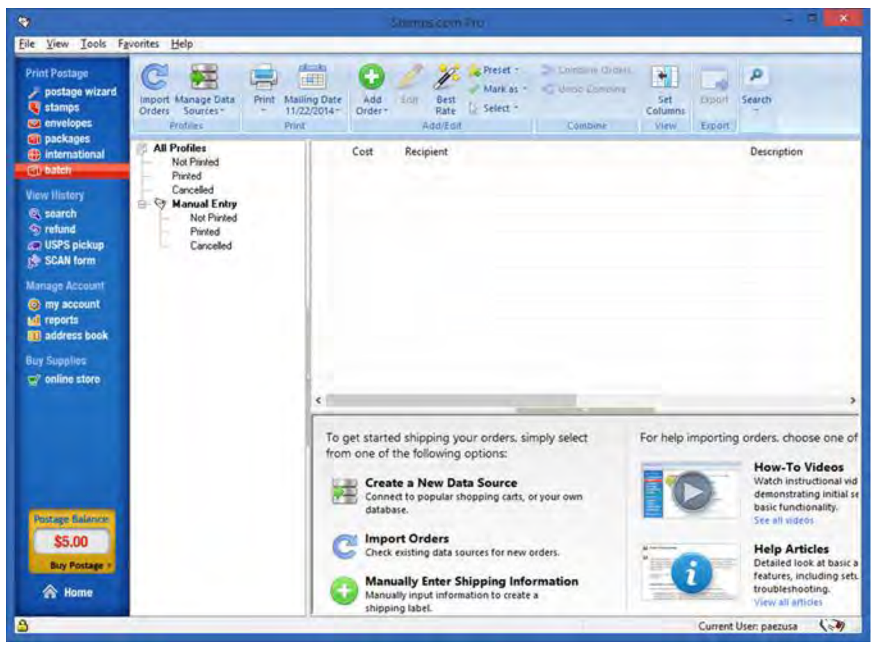
Use the Export and Import functions to send and retrieve information from Stamps.com’s PC-based client application. To do this, follow the steps and screenshots below:

1. Follow the instructions in section 6.8 to map your ship methods and package types to the “XML Exchange - Stamps.com” export format. Please note that there may be two export formats, one for “Stamps.com” and another for “XML Exchange – Stamps.com”. The latter is the one that should be mapped.

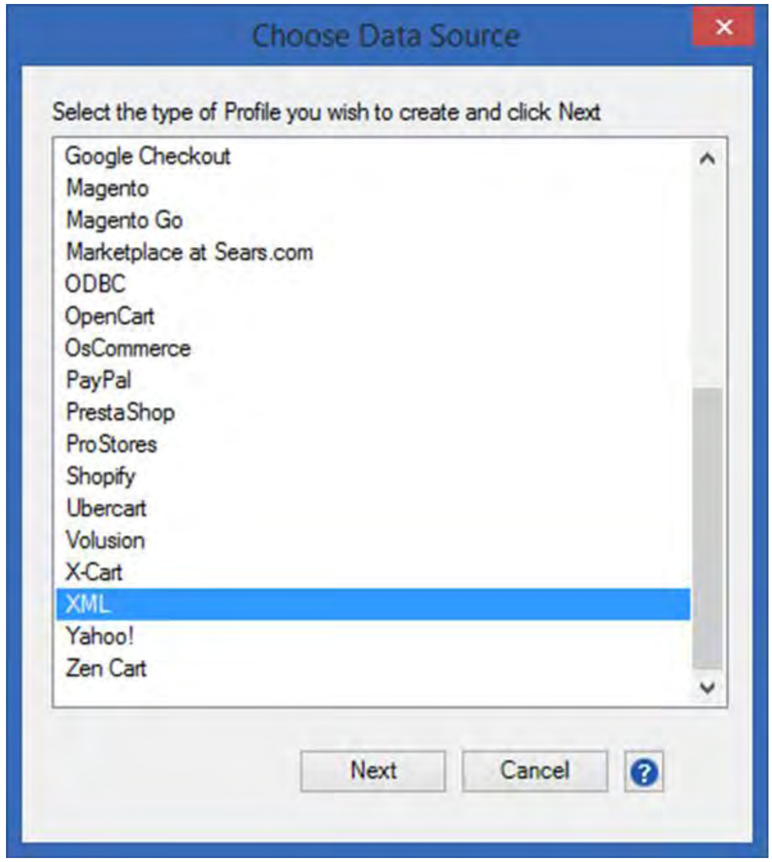
2. Follow the instructions in section 7.7.f to setup the program settings for using Stamps.com XML exchange.

3. Right click on an order in SuperManager and choose “Export”, “Stamps.com XML”. It is recommended to save this file to “Documents\SuperManager\Stamps.com\sm-stamps.xml”, but this file can be saved anywhere on your computer.

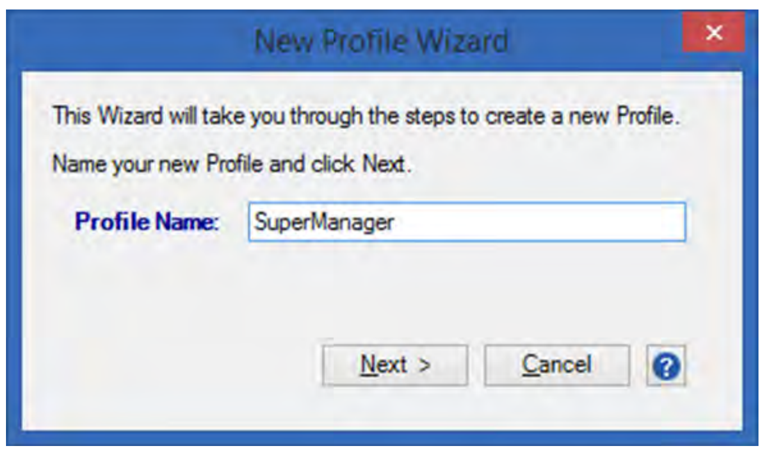
4. Launch stamps.com and choose “batch” from the main menu on the left



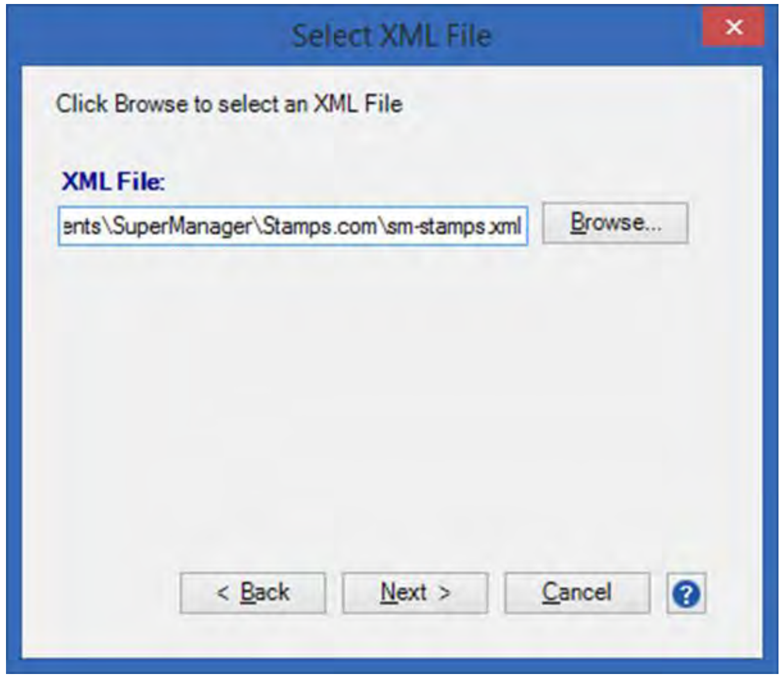
5. Press the “Manage Data Sources” dropdown button in the ribbon and choose “Add Source”, then in the “Choose Data Source” popup, choose “XML” and click “Next”



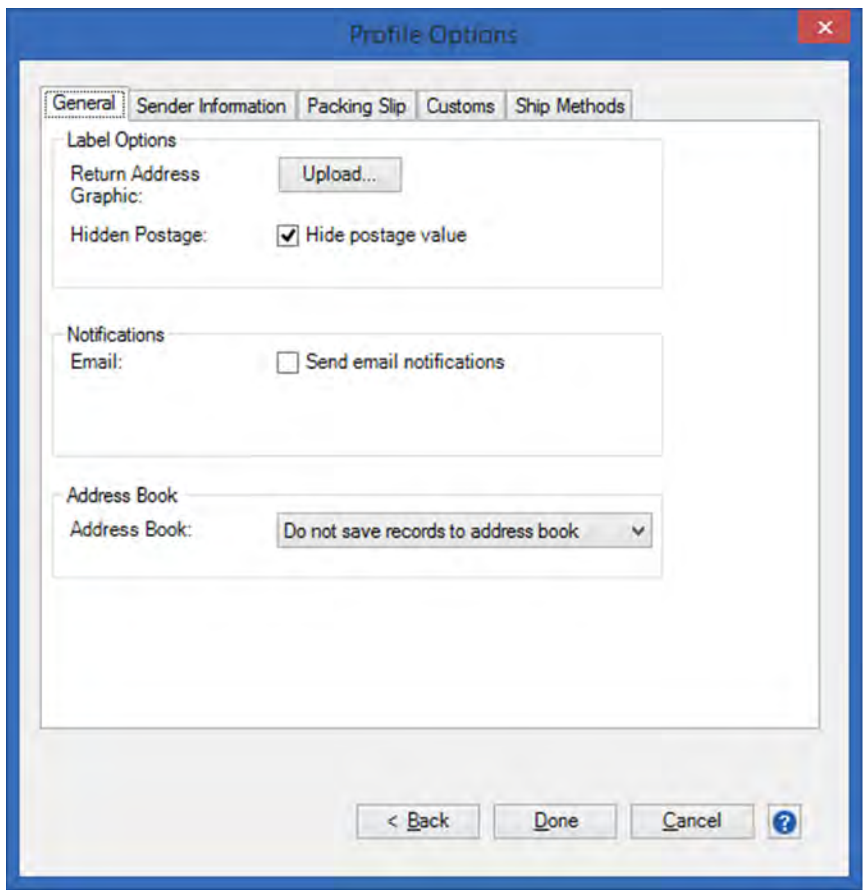
6. Enter “SuperManager” as the profile name and press “Next”



7. Press the “Browse…” button and locate and select the file created in step 2



8. Enter any profile options, such as rubber stamp picture, address, etc… in the profile options and click “Done”



11.7.b Exporting to Stamps.com

After you have setup the Stamps.com connection (See section 11.7.a), you can export orders to Stamps.com to print postage.

1. First, enter the order/shipment weights as described in section 7.0 in The SuperManager.

2. Either press the “Stamps.com” button on the shipment details or select multiple orders, right click and choose “XML Exchange”, “Stamps.com”

3. Start Stamps.com

4. Click on “batch” from the Main Menu

5. Select the “Not Printed” list from the XML:SuperManager profile and press the “Import Orders” button.

6. Select the packages to ship and press the “Print” button.

Once the shipments are printed in Stamps.com, SuperManager should automatically receive the tracking numbers for the selected order(s).

12.0 Appendix

12.1. The SuperManager Variable List

12.1.a Company and General Information

The SuperManager Variable / Replacement Code	Explanation	Example
`company_name`	Company name	SuperWare
`company_contact`	Contact name for your company	John Smith
`company_contact_first_name`	Contact name for your company	John
`company_contact_last_name`	Contact name for your company	Smith
`company_store_type`	Type of store	Yahoo
`company_storeid`	Online store id	supermanager
`company_userid`	Online login id	supermanager
`company_address1`	Company address 1	111 Penny Lane
`company_address2`	Company address 2	Suite 000
`company_street`	Combination of address 1 and 2	111 Penny Lane Suite 000
`company_address`	Complete Address	111 Penny Lane Suite 000 Penny City, CA 11111
`company_city`	Company city	Penny City
`company_state`	Company state	CA
`company_region`	Company state code for US and Canadian addresses	CA
`company_zip`	Company zip code	11111
`company_country_code`	Company country code	US
`company_country`	Company country	United States
`company_website`	Company website	http://www.thesupermanager.com
`company_email`	Company email address	info@thesupermanager.com
`company_phone_number`	Phone number w/o spaces	8797971111
`company_phone`	Company phone number	(879)797-1111
`company_fax`	Company fax number	(789)798-2222
`company_id_prefix`	Order ID prefix specified for the company	SM-
`Company_custom`*n*	Access any of the custom fields defined for your stores by clicking the “Customs” button at “View”, “Store Settings”	
`todays_date`	Date that the export/report was generated	11-Jan-04
`todays_date[`*format*`]`	Date that the export/report was generated	See date format descriptors in section 12.1.h
`report_objects`	For reports, the number of orders in the report	12
`report_object`	For reports, the location of the current order in the list of orders in the report	3
`page_break`	Inserts a page break into the report	

12.1.b Order Information

The SuperManager Variable / Replacement Code	Explanation	Example
`order_id`	Order id	SW111 or SW111-manual if a manual order (fax, phone, ebay, etc.)
`order_id_noprefix`	Order id without a prefix	111 or 111-manual
`order_alt_id`	Alternative order id	123-293-2222
`order_type`	Order type	eStore, phone, fax, email, etc.
`order_status`	Order status	Open, Charged, Paid, Shipped, etc.
`order_flag`	Order flag	Waiting for customer response
`order_date`	Order date	10 Jan 2004
order_date[*format*]	Order date	See date format descriptors in section 12.1.h
`order_time`	Order time	10:05:59
`order_comments`	Customer comments	Please put package inside door but do not let cat out!
`order_merchant_comments`	Merchant comments	We instructed UPS to leave it on the door
`order_comments_json`	All order comments in java script notation	[{“name”:”CustomerComments”,”value”:”Please put package inside door but do not let cat out!”},{“name”:”MerchantComments”,”value”,”We instructed UPS to leave it on the door”}]
`order_notes`	Merchant notes	Sent email template ‘backordered’ 13 Apr 2006
`order_comments_and_notes`	All order comments and notes in java script notation	[{“name”:”CustomerComments”,”value”:”Please put package inside door but do not let cat out!”},{“name”:”MerchantComments”,”value”,”We instructed UPS to leave it on the door”},”name”:”MerchantNotes”,”value”:”Sent email template ‘backordered’ 13 Apr 2006”}]
`order_risk_score`	The risk score for the order	0.00
`order_referrer`	Referrer	www.google.com, www.yahoo.com
`order_entrypoint`	Entry Point	www.store.com/widgets.html
`order_ip_address`	IP address used to make order	192.168.0.0
`order_http_agent`	http Agent info or rev share url	
`order_rev_share`	http Agent info or rev share url	
`ship_first_name`	Ship to first name	John
`ship_last_name`	Ship to last name	Smith
`ship_name`	Ship to full name	John Smith
`ship_company`	Ship to company	Smith’s Market
`ship_company_or_name`	Ship to company name, or if blank, customer name	Company provided: Smith’s Market Not Provided: John Smith
`ship_company_or_lnf`	Ship to company name, or if blank, customer name last name first	Company provided: Smith’s Market Not Provided: Smith, John
`ship_company_or_name`	Ship to company or if blank, customer name	Smith’s Market

The SuperManager Variable / Replacement Code	Explanation	Example
`ship_attention`	Ship to name if there is a company defined, otherwise blank	John Smith
`ship_address1`	Shipping address 1	111 Penny Lane
`ship_address2`	Shipping address 2	Suite 000
`ship_city`	Shipping city	Penny City
`ship_state`	Shipping state	CA
`ship_region`	Shipping state code for US and Canadian addresses	CA
`ship_zip5`	Shipping zip code, first 5 digits	11111
`ship_zip`	Shipping zip code	11111-1111
`ship_country_code`	Shipping country code	US
`ship_country_usps`	Shipping country using the official USPS name	United States
`ship_country`	Shipping country	United States
`ship_region`	Shipping state if in the US or Canada, otherwise the country	CA
`ship_address`	Shipping address combined	111 Penny Lane Suite 000 Penny City, CA 11111
`ship_street`	Combination of address 1 and 2	111 Penny Lane Suite 000
`ship_phone_number`	Phone number w/o spaces	8797911111
`ship_phone`	Shipping phone number	(879)797-1111
`ship_customs`	All custom variables received from the shipping checkout page	Where did you find us?: Google Your favorite color?: Red
ship_custom*n*	The n^{th} custom variable choice from the shipping checkout page	(For ship_custom1 as in the example above) Google
ship_custom[*name*]	The *name* (the name you assigned in your online store to this data) custom variable choice from the shipping checkout page	(For ship_custom[color] as in the example above) Red
`bill_first_name`	Bill to first name	John
`bill_last_name`	Bill to last name	Smith
`bill_name`	Bill to full name	John Smith
`bill_company`	Bill to company	Smith’s Market
`bill_company_or_name`	Bill to company name, or if blank, customer name	Company provided: Smith’s Market Not Provided: John Smith
`bill_company_or_lnf`	Bill to company name, or if blank, customer name last name first	Company provided: Smith’s Market Not Provided: Smith, John
`bill_attention`	Bill to name if there is a company defined, otherwise blank	John Smith
`bill_address1`	Billing address 1	Suite 000
`bill_address2`	Billing address 2	111 Penny Lane
`bill_city`	Billing city	Penny City
`bill_state`	Billing state	CA
`bill_region`	Billing state code for US and Canadian addresses	CA
`bill_zip5`	Billing zip code, first 5 digits	11111
`bill_zip`	Billing zip code	11111-1111

The SuperManager Variable / Replacement Code	Explanation	Example
bill_country_code	Billing country code	US
bill_country_usps	Billing country using the official USPS	United States
bill_country	Billing country	United States
bill_region	Billing state if in the US or Canada, otherwise the country	CA
bill_address	Billing address combined	111 Penny Lane Suite 000 Penny City, CA 11111
bill_street	Combination of address 1 and 2	111 Penny Lane Suite 000
bill_phone_number	Phone number w/o spaces	8797911111
bill_phone	Shipping phone number	(879)797-1111
bill_customs	All custom variables received from billing checkout page	Where did you find us?: Google Your favorite color?: Red
bill_custom*n*	The nth custom variable choice from the billing checkout page	(For bill_custom1 as in the example above) Google
bill_custom[*name*]	The *name* (the name you assigned in your online store to this data) custom variable choice from the billing checkout page	(For bill_custom[color] as in the example above) Red
order_email	Customer/Order Email	customer@aol.com
order_ship_method	Shipping method	Ground Shipping
order_ship_method_alt	Shipping method alternate name	Ground Shipping
order_ship_residential order_ship_residential_flag order_ship_residential_boolean	Defaults to true. Set if there is a custom shipping/billing variable called “Residential”	"Yes" or "No" “1” or “0” “True” or “False”
order_ship_class	Shipment Class	Carrier shipping class; ground, overnight
order_opt_out order_opt_out_flag order_opt_out _boolean	Defaults to true. Set if there is a custom shipping/billing variable called “Opt Out”	"Yes" or "No" “1” or “0” “True” or “False”
order_tracking_link	Tracking link	"Google Adwords kw - Order Processing"
order_shipments	Number of shipments in order	1,2,3 etc.
order_postage_amount	Order postage amount paid	$5.49
order_subtotal	Order subtotal	$49.99
order_tax_total	Order tax total	$3.94
order_giftwrap_total	Order gift wrap total	$3.95
order_discount_total	Order discount total	$3.95
order_adjustment_total	Order adjustment total	-$10.00
order_coupon_total	Order coupon total	$0.00
order_giftcert_total	Order gift certificates total	$15.00
order_shipping_total	Order shipping total	$5.95
order_credit_total	Order credit total	$5.00
order_restocking_total	Order restocking fee total	$2.00
order_total	Order total	$59.88
order_taxable_sales	Total taxable sales in the order	$59.88

The SuperManager Variable / Replacement Code	Explanation	Example
order_coupon_id	Coupon ID	"freeshipping", "holidaysale"
order_coupon_description	Coupon Description	Free Shipping, 10% holiday sale
order_coupon_value	Coupon Value	4.95, 10.65
order_gift order_gift_flag order_gift_boolean	Gift	"Yes" or "No" “1” or “0” “True” or “False”
order_gift_message	Gift Message	"Happy Birthday, see you soon"
bill_method_account	The account associated with the bill method for the order (from the store settings Accounting Export tab)	MasterCard, Visa, PayPal, etc.
bill_method	Payment Method	MasterCard, Visa, PayPal, etc.
bill_cardnumber_mask	Credit Card Number	xxxxxxxxxxxx1234
bill_cardnumber	Credit Card Number	5414123412341234
bill_po_number	If pay method is “Purchase Order” or “PO” the data in the credit card number field, otherwise it is just blank	12345
bill_cardexpiration	Credit Card Expiration	mm/yyyy
bill_avs_response	AVS Response	YYY, NNN, NYZ, etc
bill_cvv_response	CVV Response	M, S, etc
bill_auth_number	Authorization number	123456
bill_auth_code	Authorization code	abc123
order_amount_paid	Total of the payments received	$100.00
order_amount_credited	Total of the credits given	$10.00
order_payment_due	Total due minus total paid.	$100.00
order_profit	Estimated profit based on item costs, item prices, totals and shipping costs in the order	$25.48
order_repeat_orders	Number of repeat orders by the same customer	5
order_repeat_order_list	List of repeat orders by the same customer	4562, 6754, 8392, 10232
order_items	Number of items in order	1, 5, 20, etc.
order_item_list	Quick list of items in an order, Item code(Qty)	WID_111(10), WID_222(9)
backordered_items	Number of backordered items	2
backordered_item_list	Quick list of backordered items in an order, Item code(Qty)	WID_111(10), WID_222(9)
canceled_items	Number of canceled items	2
canceled_item_list	Quick list of canceled items in an order, Item code(Qty)	WID_111(10), WID_222(9)
order_scriptable[]	Special keyword to ensure the variable(s) inside the brackets compatible with java or other scripting languages	order_scriptable[order_comments] would ensure that quotes and other reserved characters in the comments are not passed into the script.
order_default[*variable*|*default*]	Special keyword that is replaced with the variable(s) before the pipe symbol if they are not blank or the value given as default if they are	order_default[bill_address2|None] would give the address2 if defined or the phrase “None” if it is blank

12.1.b.1. Order Item Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
item_number	Position of the item in the item list	1
item_id	Item ID	thesprmngr
item_code	Item code	THE_SUPER
item_unique_id	Item unique ID	123abc456
item_description	Item description	Powerful order manager...
item_description_noprefix	Item description without “BACKORDERED:”, “CANCELED”, etc… prepended for items without normal status	Powerful order manager…
item_status	Item status	Normal
item_url	Item url	www.thesupermanager.com/thesprmngr.html
item_thumbnail	Item thumbnail picture including any meta data	www.thesupermanager.com/thesprmngr.gif
item_thumbnail_src	Item thumbnail picture	www.thesupermanager.com/thesprmngr.gif
item_options	Item options separated by carriage returns	Color = Red Size = Large (+1.00)
item_options_trim	Item options separated by carriage returns with any text in between parenthesis removed (as in incremental pricing)	Color = Red Size = Large
item_options_csv	Item options separated by commas	Color = Red, Size = Large (+1.00)
item_options_csv_trim	Item options separated by commas with any text in between parenthesis removed (as in incremental pricing)	Color = Red, Size = Large
item_options_json	Item options in java script notation	[{“name”:“Color”,”value”: “Red”},{“name”:“Size”,”value”:”Large (+1.00)”}]
item_options_json_trim	Item options in java script notation with any text in between parenthesis removed (as in incremental pricing)	[{“name”:“Color”,”value”:“Red”},{ “name”:“Size”,”value”:”Large”}]
item_option*n*	The nth item option choice	For item_option2 in the example above: Large (+1.00)
item_quantity_available	Number of items available	99
item_quantity_backordered	Number of items backordered	1
item_quantity	Item quantity	1
item_price	Item price	399
item_ext_price	= quantity * price	399
item_cost	Item cost	300
item_ext_cost	= quantity * cost	300

The SuperManager Variable / Replacement Code	Explanation	Example
item_taxable item_taxable_flag item_taxable_boolean	Item taxable	"Yes" or "No" “1” or “0” “True” or “False”
item_backordered item_backordered_flag item_backordered_boolean	Item backordered	"Yes" or "No" “1” or “0” “True” or “False”
item_backordered_date	Date the items are expected to ship	12 Dec2003
item_backordered_date[*format*]	Date the items are expected to ship	See date format descriptors in section 12.1.h
item_shipment_number	Shipment Number	1, 2, 3, etc
item_shipped item_shipped_flag item_shipped_boolean	Item shipped	"Yes" or "No" “1” or “0” “True” or “False”
item_weight_poundounce	Item weight in pounds ounces	12 lbs 8 oz
item_weight_pound	Item weight in pounds	12.5 lbs
item_weight_pound_value	Item weight in pounds	12.5
item_weight_ounce	Item weight in ounces	200 oz
item_weight_ounce_value	Item weight in ounces	200
item_weight_kgram	Item weight in kilograms	5.7 kg
item_weight_kgram_value	Item weight in kilograms	5.7
item_weight_gram	Item weight in grams	5700 g
item_weight_gram_value	Item weight in grams	5700
item_weight	Item weight in store units	200 oz
item_ship_method	Ship method of the shipment containing the item	Ground Shipping
item_ship_method_alt	Ship method alt name of the shipment containing the item	Ground Shipping
item_carrier	Carrier of the shipment containing the item	UPS, USPS, FedEx, etc
item_carrier_type	Carrier type for shipment containing the item	
item_tracking_id	Tracking id for the shipment containing the item	1Z2342566632
item_tracking_url	Tracking url for the shipment containing the item	1Z2342566632
item_postmark_date	Item postmark date	12 Dec 2003
item_postmark_date[*format*]	Item postmark date	See date format descriptors in section 12.1.h
item_product_	Exposes all of the product variables as shown below	
item_variant_	Exposes all of the product variant variables as shown below	

12.1.b.2. Order Backordered Item Information

All the variables shown above can be used with “backordered_” in front of them to get a list of only the backordered items, “canceled_” in front of them to get a list of only the canceled items, “returned_” in front of them to get only the returned items or “defective_” in front of them to get only the defective items.

12.1.b.3. Order Shipment Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
`shipment_id`	Shipment ID	1, 2, 3, etc
`shipment_number`	Shipment index (starting at 1 and incrementing from there)	1
`shipment_unique_id`	Shipment unique ID	123abc456
`shipment_item_list`	List of items in the shipment	ABC(2), XYZ(4)
`shipment_items`	Number of line items in the shipment	1
`shipment_ext_items`	Number of items in the shipment (sum of the quantity of each line item in the shipment)	3
`shipment_ship_method`	Shipment ship method	Priority Mail
`shipment_ship_method_alt`	Shipment ship method alt name	Priority Mail
`shipment_ship_class`	Shipment ship class for the selected export format	PRIORITY
`shipment_package_type`	Shipment package type for the selected export format	RECTPARCEL
`shipment_length_round`	Shipment length rounded to the nearest inch	1
`shipment_length`	Shipment length	1.1
`shipment_width_round`	Shipment width rounded to the nearest inch	2
`shipment_width`	Shipment width	2.1
`shipment_height_round`	Shipment height rounded to the nearest inch	3
`shipment_height`	Shipment height	3.1
`shipment_weight_poundounce`	Shipment weight in Lbs Oz	12 lbs 8 oz
`shipment_weight_pound`	Shipment weight in Lbs	12.5 lbs
`shipment_weight_pound_value`	Shipment weight in Lbs	12.5
`shipment_weight_ounce`	Shipment weight in Oz	200 oz
`shipment_weight_ounce_value`	Shipment weight in Oz	200
`shipment_weight_kgram`	Shipment weight in Kgrams	5.7 kg
`shipment_weight_kgram_value`	Shipment weight in Kgrams	5.7
`shipment_weight_gram`	Shipment weight in Grams	5700 g
`shipment_weight_gram_value`	Shipment weight in Grams	5700
`shipment_weight`	Shipment weight in store units	200 oz
`shipment_dimensional_weight`	Shipment dimensional weight	75

`shipment_insured`
`shipment_insured_flag`
`shipment_insured_boolean`
	Shipment insured	"Yes" or "No"
		“1” or “0”
		“True” or “False”

`shipment_signature`
`shipment_signature _flag`
`shipment_signature _boolean`
	Shipment signature required	"Yes" or "No"
		“1” or “0”
		“True” or “False”

The SuperManager Variable / Replacement Code	Explanation	Example
shipment_oversize_flag shipment_oversize_boolean shipment_oversize	Shipment marked oversize	"Yes" or "No" “1” or “0” “True” or “False”
shipment_value	Declared value of the shipment	$49.95
shipment_postmark_date	Shipment postmark date	12 Dec 2003
shipment_postmark_date[*format*]	Shipment postmark date	See date format descriptors in section 12.1.h
shipment_postage	Shipment postage amount	13.00
shipment_carrier	Shipment Carrier	USPS, FedEx, UPS, etc.
shipment_tracking_id	Shipment tracking id	1Z2342566632
shipment_tracking_url	Shipment tracking url based on the format specified for the carrier	http://www.mycarrier.com/check_this_package.php?tracking=1Z234255
shipment_subtotal	Subtotal for the items in a shipment	13.00
shipment_total	Total for the proportion of the order in the shipment	13.50
shipment_tax_total	Taxes total for the proportion of the order in the shipment	0.50
shipment_giftwrap_total	Giftwrapping total for the proportion of the order in the shipment	0.00
shipment_discount_total	Discount total for the proportion of the order in the shipment	0.00
shipment_adjustment_total	Adjustment total for the proportion of the order in the shipment	0.00
shipment_coupon_total	Coupon total for the proportion of the order in the shipment	0.00
shipment_giftcert_total	Gift Certificates total for the proportion of the order in the shipment	0.00
shipment_shipping_total	Shipping total for the proportion of the order in the shipment	0.00
shipment_credit_total	Credit total total for the proportion of the order in the shipment	0.00

12.1.b.4. Order Total Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
total_name	Order Total Name	Subtotal, Shipping, Tax, etc.
total_amount	Order Total Amount	$56.15, $4.95, $3.77

12.1.b.5. Order Payment Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each shipment in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
payment_type	Type of transaction	Auth, Charge, Credit, etc…
payment_date	Transaction date	10 Jan 2004
payment_date[*format*]	Transaction date	See date format descriptors in section 12.1.h
payment_time	Transaction time	10:05:59
payment_number	Authorization/transaction number	123456
payment_amount	Transaction amount	$59.88
payment_avs	AVS response for authorizations	YYY
payment_avs_meaning	AVS response meaning for authorizations	Addr OK
payment_cvv	CVV response for authorizations	M
payment_cvv_meaning	CVV response meaning for authorizations	Matched

12.1.c Product Information

The SuperManager Variable / Replacement Code	Explanation	Example
product_id	Product ID	Thesprmngr
product_code	Product code	THE_SUPER
product_description	Product description	Powerful order manager...
product_caption	Product caption	Powerful order manager...
product_hidden product_hidden_flag product_hidden_boolean	Product hidden	"Yes" or "No" “1” or “0” “True” or “False”
product_availability	Product availability	10
product_path_name	Product path name	Men's T-Shirts
product_paths_name	Multiple product path names	Men's T-Shirts, Boy's T-Shirts
product_path_url	Product path url	http://store.yahoo.com/sm/sm.html
product_paths_url	Multiple product path urls	http://store.yahoo.com/sm/sm.html, http:..
product_personalization_charge	Personalization charge	$25.00
product_giftwrap_charge	Gift wrap charge	$1.00
product_base_price	Product base price	$2.00
product_average_cost	Average cost of product	$1.50
product_declared_value	Declared value of product	$2.00
product_taxable product_taxable_flag product_taxable_boolean	Product taxable	"Yes" or "No" “1” or “0” “True” or “False”
product_orderable product_orderable_flag product_orderable_boolean	Product orderable	"Yes" or "No" “1” or “0” “True” or “False”

The SuperManager Variable / Replacement Code	Explanation	Example
product_weight_poundounce	Product weight in pounds oz	12 lbs 8 oz
product_weight_pound	Product weight in pounds	12.5 lbs
product_weight_pound_value	Product weight in pounds	12.5
product_weight_ounce	Product weight in ounces	200 oz
product_weight_ounce_value	Product weight in ounces	200
product_weight_kgram	Product weight in kilograms	5.7 kg
product_weight_kgram_value	Product weight in kilograms	5.7
product_weight_gram	Product weight in grams	5700 g
product_weight_gram_value	Product weight in grams	5700
product_weight	Product weight in store units	200 oz
product_picture_src	Product picture url	www.thesupermanager.com/thesprmngr.gif
product_picture	Product picture url	www.thesupermanager.com/thesprmngr.gif
product_thumbnail_src	Product thumbnail picture url	www.thesupermanager.com/thesprmngr.gif
product_thumbnail	Product Thumbnail Picture url	www.thesupermanager.com/thesprmngr.gif
product_url	Product url	www.thesupermanager.com/thesprmngr.html
product_min_order	Minimum order quantity	10
product_max_order	Maximum order quantity	15
product_quantum		
product_quantity_prices	Product quantity prices	5 at $5, 10 at $4, etc
product_option_lists	Product option list	Color: red, blue, green, Size: small, medium, large
product_option_list*n*	The n^{th} option list name	For product_option_list2 in the example above, Size
product_options*n*	The n^{th} option list options	For product_options2 in the example above, small,medium,large
product_origin_country	Product country of origination	United States
product_custom1	Product custom field 1	
product_custom2	Product custom field 2	

12.1.c.1. Product Variant Information

The SuperManager Variable / Replacement Code	Explanation	Example
variant_name	Variant Name	Blue-Small
variant_options	Variant Options	Blue-Small
variant_code	Product Alternative Code or Code	thesprmngr
variant_alternative_code	Alternative Code	the_supermanager
variant_upc	UPC/SKU code	1203948291
variant_supplier_part	Supplier part number	12345sm
variant_supplier_part_or_code	Supplier part number if one exists, if not, the product code	12345sm
variant_supplier	Supplier	SuperWare, LLC

The SuperManager Variable / Replacement Code	Explanation	Example

`variant_dropship`
`variant_dropship_flag`
`variant_dropship_boolean`
	Dropship	"Yes" or "No"
		“1” or “0”
		“True” or “False”

`variant_quantity_on_hand`	Quantity in Stock	10
`variant_lead_time`	Lead time after re-order (days)	3
`variant_reorder_at`	Level at which to re-order	3
`variant_average_cost`	Average cost of all inventory on hand	3.95
`variant_fifo_cost`	Cost of next unit to be sold	3.50
`variant_inventory_value`	Sum of all inventory on hand	95.00
`variant_optimum_inventory`	Optimum quantity in stock	6

12.1.d Merchant Batch Information

The SuperManager Variable / Replacement Code	Explanation	Example
`batch_number`	Batch number	00250
`batch_account`	Batch account	Paymentech merchant account 234561202
`batch_date`	Batch date	10 Jun 04
`batch_date[`*`format`*`]`	Batch date	See date format descriptors in section 12.1.h
`batch_amount`	Batch amount	$30,223.00
`batch_entries`	Number of entries in the batch	1, 5, 20, etc.

12.1.d.1. Merchant Batch Entry Information

The SuperManager Variable / Replacement Code	Explanation	Example
`batch_entry_number`	Batch entry number	1, 5, 20, etc.
`batch_entry_invoice`	Batch entry invoice number	1202312334
`batch_entry_approval`	Batch entry approval number	030201
`batch_entry_amount`	Batch entry amount	$20.00
`batch_entry_card_exp`	Batch entry card expiration	mm/yyyy
`batch_entry_card_num`	Batch entry card number	XXXXXXXXXXXX1234
`batch_entry_card_num_mask`	Batch entry card number	5410123412341234
`batch_entry_pay_method`	Batch entry payment method	MasterCard

12.1.e Supplier Information

The SuperManager Variable / Replacement Code	Explanation	Example
`supplier_name`	Name of the supplier	SuperWare, LLC
`supplier_contact_first_name`	Contact first name	John
`supplier_contact_last_name`	Contact last name	Doe
`supplier_contact`	Contact full name	John Doe
`supplier_address1`	First line of the street address	111 Penny Lane

The SuperManager Variable / Replacement Code	Explanation	Example
supplier_address2	Remaining lines of the street address	Suite 000
supplier_street	The street address	111 Penny Lane Suite 000
supplier_address	The full address	111 Penny Lane Suite 000 Penny City, CA 11111-1111
supplier_city	City	Penny City
supplier_state	State	CA
supplier_region	State code for US and Canadian addresses	CA
supplier_zip5	First 5 characters of the zip code	11111
supplier_zip	Zip Code	11111-1111
supplier_country_code	The two-letter abbreviation for the country	US
supplier_country	The full name of the country	United States
supplier_website	Supplier website	www.superware.com
supplier_email	Email address	info@thesupermanager.com
supplier_phone_number	Phone number – numbers only	8797971111
supplier_phone	Phone number	(879)797-1111
supplier_fax	Fax phone number	(879)797-1112
supplier_account	Account number	123456
supplier_notes	Notes entered about the supplier	Hours: 9 – 5 Mon - Friday

12.1.f Purchase Order Information

The SuperManager Variable / Replacement Code	Explanation	Example
po_number	Number	1249
po_date	Date	10 Jun 04
po_date[*format*]	Date	See date format descriptors in section 12.1.h
po_time	Time	10:42 PM
po_required_date	Required date	10 Jun 04
po_required_date[*format*]	Required date	See date format descriptors in section 12.1.h
po_required_time	Required time	10:42 PM
po_expected_date	Expected date	10 Jun 04
po_expected_date[*format*]	Expected date	See date format descriptors in section 12.1.h
po_expected_time	Expected time	10:42 PM
po_notes	Notes	Please send it in the same packaging as last time
po_description	Description	Another order from us
po_ship_method	Ship method	Overnight
po_subtotal	Subtotal	$1203.23
po_shipping_charge	Charges for shipping	$40.00
po_import_tarrifs	Import duties	$234.99

The SuperManager Variable / Replacement Code	Explanation	Example
po_total	Total PO amount	$1478.22
po_supplier_	Exposes all the supplier variables for the supplier the PO is addressed to	
po_items	Number of items in PO	1, 5, 20, etc.
po_item_list	Quick list of items in an PO, Item code(Qty)	WID_111(10), WID_222(9)
po_scriptable[]	Special keyword to ensure the variable(s) inside the brackets compatible with java or other scripting languages	po_scriptable[po_notes] would ensure that quotes and other reserved characters in the notes are not passed into the script.

12.1.f.1. PO Item Information

When used in a text format a new line is created for each total in the order. When used in an HTML report a new row is create for each total in the order.

The SuperManager Variable / Replacement Code	Explanation	Example
item_id	Item ID	thesprmngr
item_code	Item code	THE_SUPER
item_supplier_part	Item supplier part number	THE_SUPER
item_description	Item description	Powerful order manager...
item_url	Item url	www.thesupermanager.com/thesprmngr.html
item_thumb	Item thumbnail picture including any meta data	www.thesupermanager.com/thesprmngr.gif
item_thumb_src	Item thumbnail picture	www.thesupermanager.com/thesprmngr.gif
item_options	Item options separated by carriage returns	Color = Red Size = Large (+1.00)
item_options_trim	Item options separated by carriage returns with any text in between parenthesis removed (as in incremental pricing)	Color = Red Size = Large
item_options_csv	Item options separated by commas	Color = Red, Size = Large (+1.00)
item_options_csv_trim	Item options separated by commas with any text in between parenthesis removed (as in incremental pricing)	Color = Red, Size = Large
item_option_choices	Item option choices separated by spaces	Red Large (+1.00)
item_option_choices_trim	Item option choices separated by spaces with any text in between parenthesis removed (as in incremental pricing)	Red Large
item_option*n*	The n^{th} item option choice	For item_option2 in the example above: Large (+1.00)
item_quantity_recieved	Number of items received	99
item_quantity_backordered	Number of items backordered	1

The SuperManager Variable / Replacement Code	Explanation	Example
`item_quantity`	Item quantity	1
`item_cost`	Item cost	300
`item_ext_cost`	= quantity * cost	300
`item_product_`	Exposes all of the product variables as shown below	

12.1.f.2. PO Backordered Item Information

All the variables shown above can be used with “backordered_” in front of them to get a list of only the backordered items.

12.1.g Summary Report Variables

The following variables may be used in the summary report section to print a summary list of various information.

order_id	item_id
order_date	item_code
order_type	item_description
order_referrer	item_options
order_items	item_quantity
order_ship_method	item_price
order_total	item_ext_price
total_name	item_cost
total_amount	item_ext_cost
ship_city	shipment_carrier
ship_state	shipment_postage
ship_zip	shipment_weight_poundounce
ship_country	shipment_weight_pound
bill_city	shipment_weight_ounces
bill_state	shipment_weight_kgram
bill_zip	shipment_weight_gram
bill_country	shipment_weight

12.1.h Date format descriptors

The following variables may be embedded in the format designated after any date variable inside brackets.

Code	Meaning	Example (1 Jan 2006 12:01:02 AM)
%a	Abbreviated weekday name	Sun
%A	Full weekday name	Sunday
%b	Abbreviated month name	Jan
%B	Full month name	January
%c	Date and time representation appropriate for locale	1/1/2006 12:00:00 AM
%d	Day of month as decimal number (01 – 31)	01
%H	Hour in 24-hour format (00 – 23)	00
%I	Hour in 12-hour format (01 – 12)	12
%j	Day of year as decimal number (001 – 366)	001
%m	Month as decimal number (01 – 12)	01
%M	Minute as decimal number (00 – 59)	01
%p	Current locale's A.M./P.M. indicator for 12-hour clock	AM
%S	Second as decimal number (00 – 59)	02
%U	Week of year as decimal number, with Sunday as first day of week (00 – 53)	01
%w	Weekday as decimal number (0 – 6; Sunday is 0)	0
%W	Week of year as decimal number, with Monday as first day of week (00 – 53)	01
%x	Date representation for current locale	Depends on windows settings
%X	Time representation for current locale	Depends on windows settings
%y	Year without century, as decimal number (00 – 99)	06
%Y	Year with century, as decimal number	2006
%z, %Z	Either the time-zone name or time zone abbreviation, depending on registry settings; no characters if time zone is unknown	EST

12.2. Error Messages and Trouble Shooting Exporting Batches to QuickBooks

Following is a comprehensive list of error messages that can be issued when exporting batches to QuickBooks and how to correct them.

Error/Warning	**Resolution**
"You have not yet filled in the taxable tax code. Please enter this in the store settings and try again." **"You have not yet filled in the nontaxable tax code. Please enter this in the store settings and try again."**	You have not entered the taxable/non-taxable tax code in your store settings. See section 6.9 for how to set this setting.

“Taxable sales tax code does not exist and an attempt to add it failed” **“Nontaxable sales tax code does not exist and an attempt to add it failed”**	QuickBooks returned an error when SuperManager tried to create the taxable/non-taxable tax code you specified in the store settings. Check if the name of the tax code you have entered is a proper 3-letter tax code. If that is the case, try to create the tax code manually in QuickBooks. If you have an error manually creating the tax code, consult QuickBooks support.
“You have not yet filled in the tax reference item name. **Please enter this in the store settings and try again.”**	You have not entered the tax reference item in your store settings. See section 6.9 for how to set this setting.
“Your QuickBooks file does not contain the tax reference/Sales Tax item you have requested to use. **SuperManager is creating this item for you. Please enter the vendor this item should reference.”**	SuperManager automatically creates the service items you have entered in your accounting export settings if they do not already exist. When creating the tax reference item it is necessary to link it to a vendor. Typically this is your State’s tax board. If the vendor you enter does not exist, SuperManager will create it for you.
“Vendor does not exist and an attempt to add it failed”	The vendor you specified at the prompt listed above does not exist and SuperManager was unable to create it. This typically happens when you enter the name of a vendor that already exists on the customer, employee or other list in QuickBooks. QuickBooks only allows a name to exists once on these four lists. You will have to specify a name that would be unique to these four lists.
“Tax reference/Sales Tax item does not exist and an attempt to add it failed”	SuperManager was unable to create the tax reference or sales tax item you specified. The most common cause for this is that you do not have Sales Tax turned on in QuickBooks. This is required for exporting batches with SuperManager. You can enable this in your QuickBooks company preferences.
“You have selected a tax reference/sales tax item that is not of type 'Sales Tax Item' **Order totals will not export correctly this way. Please select a sales tax item.”**	The tax reference or sales tax item you have entered in your store settings exist in QuickBooks, but is not of the type “Sales Tax”. QuickBooks items can be of several types, inventoried item, non-inventoried item and sales tax item to name a few. The item name you have specified for the tax reference item already exists in your QuickBooks file, but is not of type “Sales Tax”, which is required for accurate accounting of tax liability.
“You have selected a tax reference/sales tax item with a non-zero rate. **Order totals will not export correctly this way. Please select a sales tax item with a 0.0% tax rate."**	The tax reference or sales tax item you have entered in your store settings exist in QuickBooks, but has a tax rate greater than zero percent. This will mess up how SuperManager and QuickBooks account your tax liability. Change the tax rate for the specified tax reference item to 0% or specify a new item name that SuperManager can set appropriately.
“You have not yet entered your customer name. **Please set the customer name in the 'XML Exchange' tab of the program settings.”**	You have not set a customer name for SuperManager to reference for the sales receipts it creates for the batches. See section 7.7.e for how to set this setting.

"Customer name 'YYY' resolves to a blank name for batch XXXXX Please enter name to use or press 'Cancel' to skip this batch."	The customer name entered in section 7.7.e resolves to a blank for this batch. This could happen, for example if you said to use company_contact_first_name for the customer name, but you have not filled the contact information into your store settings for the store the batch being exported belongs to.
Batch XXXXX: Unable to add customer 'YYY'	SuperManager tried to create the customer you specified in section 7.7.e, but failed in doing so. The most common cause for this is when the customer name you have specified does not exist on the customer list, but does exist on the vender, employee or other list. QuickBooks only allows a name to exists once on these four lists. You will have to specify a name that would be unique to these four lists.
"Class does not exist and an attempt to add it failed"	SuperManager tried to create the class you specified to use for the transactions, but was unable to do so. Try to create the tax code manually in QuickBooks. If you have an error manually creating the tax code, consult QuickBooks support.
"Your QuickBooks file does not contain the sales rep." SuperManager is creating this item for you. Please enter the other name list entry this rep should reference."	SuperManager is creating the sales rep you have specified in your accounting export settings. When doing so, it needs to reference an other list entry, 'You should have an other list entry for each sales rep and SuperManager needs the name of the other list entry it should reference. If it does not exist, SuperManager will create it for you.
"Other name does not exist and an attempt to add it failed"	SuperManager failed to create the other list entry you specified. The most common cause for this is when the other list name you have specified does not exist on the other list, but does exist on the customer, vender or employee list. QuickBooks only allows a name to exists once on these four lists. You will have to specify a name that would be unique to these four lists.
"Batch XXXXX: Unable to recognize payment method for entry 'YYY' based on its card number 'ZZZ'"	SuperManager first tries to get the pay method (Ex: Visa, MasterCard, etc…) by getting the pay method of the order it linked to. If it is unable to get the order for a batch entry, it will use the credit card number to recognize it as Visa, MasterCard, AmEx, etc… It was unable to successfully determine the pay method using either approach for this entry. This could happen if SuperManager could not link to the order and the credit card numbers have been erased from the data base. To fix this, follow the instructions for the next error message below.
"Batch XXXXX: Unable to find card event for entry 'YYY' for $Z.ZZ"	SuperManager was unable to find the order and/or payment event within the order for the specified transaction. To fix this, cancel the batch export, right click on the batch entry and choose "Open Order". If SuperManager is unable to find the order for the transaction, you will have to manually find the order that this transaction should link to. After finding the order, open the transaction and change the name of the transaction to start with the order ID. Then try using "Open Order" again. SuperManager may indicate that it was able to find the order, but the transaction is not in the order and will add it for you if you choose to do so.

“XXXX item 'YYY' does not exist and an attempt to add it failed” (Where XXXX could be payment, merchant fees, taxable sales, non-taxable sales, shipping, taxes, discounts, credits, coupons, adjustment, gift certificate, credits or restocking fees)	SuperManager attempted to make the item you specified, but was unable to do so. Try to create the item manually in QuickBooks. If you have an error manually creating the item, consult QuickBooks support.
“Batch XXXXX: Payments and credits sum to zero for all payment methods. No transactions will be created in QuickBooks for this batch.”	The payments collected in the batch exactly equal the credits issued so it was not necessary to export either a credit memo or a sales receipt. This condition is rare.
“QuickBooks did not return a response! Batches may or may not have been created. Batches will not be marked as exported.”	SuperManager exported the batches, but QuickBooks did not return a reply. Batches may have been exported properly, but SuperManager has no way of finding out. Check if the batches were exported. If not, you could try again. If this problem persists, try exporting the batches in smaller blocks.
“QuickBooks returned X responses for Y transactions exported! Batches will not be correctly marked as exported.”	QuickBooks returned less result messages than SuperManager exported batches. There may be some batches that did not export. Check carefully to see if any batches are missing in QuickBooks.

13.0 Index