Ollie! Distributors Administrators Guide

A member of the *Simple Accounting for Forms Experts ™* family of software

Ollie (short for 'On-Line Internet Extensions') is an e-commerce program used in conjunction with our Simple Accounting for Forms Experts (SAFE) operations software.

Main Features

Ollie enables users of any Java Script-based web browser to perform the following main tasks:

1. Enter releases of items from your organization's inventory or other sources.
2. Enter new orders to re-stock your warehouse
3. Enter orders for personalized products, such as business cards or letterhead, using any Adobe Acrobat™ document as a template.
4. Run various reports to monitor and manage your stock
5. Communicate with users within your company, as well as your distributor via web-based e-mail.
6. Track your orders via common carriers such as UPS, FedEx and DHL.
7. Seamlessly link to other e-commerce sites as provided by your administrator.

Additionally, Ollie is highly customizable for your company.

How It Works

Ollie is installed on a web server which has a network connection to SAFE. Thus, all activities performed by users in Ollie automatically update SAFE in real-time. This means that transactions are processed as quickly and efficiently as possible. You will need the following in order to use Ollie:

1. A web browser with Javascript and Cookies enabled that has access to the Ollie web site.
2. The Adobe Acrobat Reader program which is freely available from www.adobe.com.

We also highly recommend that users have a basic understanding of their web browser and common browser terms, such as hyperlinks, submitting a form and so on. If you've used any on-line e-commerce program in the past (such as eBay or Amazon) then you know everything you need to know!

Who Will Use Ollie

There are five types of people who will use Ollie:

Users: These are the people who will place orders and releases. Users can each have privileges as to what they can specifically order or release.

Approvers: These are the next level up the chain. An Approver can do everything a user can do, but they are also responsible for approving orders placed by users which are subject to various constraints (for example, orders above a certain dollar amount or for certain products.) If an order requires approval, the Approver must OK it, before it will be acted upon by your Distributor. Approvals may be multi-layered. If your company sometimes requires certain orders to be approved by more than one person, an Approver can be set up for 'Approving the Approver', again based on various order constraints.

Administrators: Actually there are three types of Administrators in Ollie (although one person can perform the tasks of the first two types.)

The **User Administrator** (UA) is responsible for answering questions from users regarding their orders. The UA's e-mail and profile are visible to all users. The UA can be set to receive an e-mail CC of all activity in Ollie in order to audit the system.

The **System Administrator** (SA) is responsible for setting various company wide options, including the overall look and feel of Ollie. Some options include:

- System Language (currently American English, British English and Mexican Spanish are available with more coming!)
- Color schemes
- Logos
- Imprinted Order Templates

The **Distributor Administrator** (DA) is, of course the provider of your orders and is running SAFE software to provide fulfillment. This person has responsibility for setting up various system options which relate to the proper functioning of the web site. This person can also be set to receive a CC of every ordering activity in Ollie, again for auditing purposes. They are the person to whom users will be referred when they have questions regarding their orders not handled by the UA or SA.

Who Should Read This Document?

This document is for everyone who will manage Ollie. It refers to procedures discussed in the Ollie End User Guide so it is suggested that you read that document first before proceeding further.

Setting Up Ollie On Your Server

Technical Requirements For Your Server

In the most basic case, Ollie is installed on the same server you are already using to run our Simple Accounting for Forms Experts software (SAFE). If so, your server probably has most of, or all the components necessary for properly running Ollie.

A quick review of system requirements:

Your server needs to be running Windows XP Professional, Windows 2000 Server or Windows 2003.

Internet Information Services (IIS). This is an included component of your server software, but it may not be automatically installed. IIS should be configured to allow the running of ASP.Net scripting. This is the programming language Ollie uses to create pages.

Your server should be connected to the internet using a **static IP address**. A static IP address means that your server will broadcast on the internet with the same address everytime. You may well have a constant connection to the internet, however, this does not mean that you have a static IP address. Contact your ISP to confirm this or to obtain one.

Your IP address should be linked to a domain name which gives you a user-friendly URL eg. www.myfavoriteprintingcompany.com

Your server will require the **Microsoft SQL Server 2000** or **2005** database. Any version will do, however, we do not recommend the Express or MSDE versions. Although they are free (a benefit not to be looked down upon!) they both have inherent limitations in terms of database size and web connections. If you have been using either of these to run SAFE, it's time to upgrade.

If you wish to allow your users to upload their own image files, then you must provide an **FTP Service** on the web server (this is configured through IIS along with the web site). You should make sure that they only have permissions to access their company's folders as discussed below.

Suggestions For Scaling Up

As your usage increases, your Ollie server may require more power. How will you know that this is the case? That's easy. Your users will tell you that their web experience is getting slower and s l o w e r. (Which brings up a good point: it is wise for you to monitor your users' experience by periodically using Ollie yourself! This is often the best way to head off performance problems.)

If you need more performance, the rule of thumb is 'divide and conquer'. This means splitting various functions of Ollie onto separate servers. We have found this to be far more effective than upgrading a single server with faster components or more memory.

First Step: Move Ollie onto it's own machine. IIS also uses a lot of machine resources. Moving Ollie onto another machine (but still connected to the same database as SAFE) not only improves Ollie performance, but also has the added benefit of providing additionally security. By moving Ollie onto a separate machine, you create another layer of security by isolating Ollie Users from potentially 'hacking' into your SAFE server.

Second Step: Move your database onto a separate machine. SQL Server requires a lot of computing power in order to do it's work. Moving the database onto a separate machine can easily double the number of Ollie Users you can serve..

Installing Ollie

Generally speaking, we (Suntower Systems) will install Ollie on your server for you. This is basically a matter of creating a few directories, installing the scripts to those folders, and configuring the web site.

Before we install, please make certain that your server meets the above technical requirements and that you have communicated your **Static IP** address and your **Domain Name**.

THE FOLDERS

Ollie uses several folders. These are located under the Simple Accounting folder. If you are installing Ollie on a machine which does not have a SAFE installation, we will create a parent Simple Accounting folder.

/Scripts	Where the Ollie program lives.	Suntower Systems
/Reports	Reports installed for your installation	Suntower Systems
/Styles	This folder contains the styles which determine the look and feel of Ollie. There are also several subfolders:	Suntower Systems Distributor Admin
/Images	This contains the main images used in Ollie for displaying the various icons common to all pages.	Suntower Systems
/EN **/BE** **/ME** **/SP** **/FR**	There will also be one folder here for each **Language Translation** you will use. (The default is 'EN' for American English.) This is a series of images used for screen objects such as buttons which are language specific, eg. 'Add', 'Update', etc.	Suntower Systems Distributor Admin

OK, now it gets a bit trickier. There will now be a folder for that particular Customer which is named for their Customer ID in SAFE. If you allow your System Administrator to manage files, this folder should be set up as their FTP folder. This is the folder structure they should see underneath the man FTP folder:

/Images	This includes the static images that your customers (SA) will use to install various files including: • PDF Templates • Product Thumbnails in JPG or GIF format. • Product Full Previews in JPG or JPG format. • Customer Logos • High resolution PDF Templates, suitable for manufacturing (optional)	Distributor Admin System Admin
/HiRes		
/Public	This folder holds files that your Users are allowed to write to.	Distributor Admin System Admin End Users
/FDFs	Stores the form-fill information from Imprint Orders	
/Uploads	Files uploaded from End Users	
/Custom	Custom styles and scripts	Suntower Systems

E-Mail Configuration

One of the key features of Ollie is it's ability to automatically send a variety of e-mails to you and your end users as the orders are entered, edited, deleted, or approved.

In order to do this, your web server must be able to act as an e-mail server, or your web server must be able to use *another* computer, acting as the e-mail server, to send out the e-mails. This can get complicated, but it may help if you remember that Ollie does *not* send e-mails; rather, it counts on being able to send a message to another system which does the actual work of sending the e-mail where it needs to go. That other system (called the **Mail Server**) may or may not be on the same machine as your web server.

GLOBAL AND ADMIN EMAILS

The Global E-Mail Address is used as the 'from' for messages generated by Ollie. All auto-generated e-mails need a valid e-mail address to send -from- otherwise the e-mailer will generate an SMTP 550 error. ollie@globaforms.com performs this function.

The Admin E-Mail address is, by default, the 'Reply To' address for E-Mails---if people need help for example. More importantly, is that, Ollie will generate a CC to this address of every e-mail sent by users or Approvers in the Order Entry process.

This lets you track who did what and serves as a backup if an order were to be lost between the time the order is entered and then transferred into SAFE.

You will need the following information for having Ollie send out e-mails:

SMTP Server: 10.10.10.111
POP3 Server: 10.10.10.111
Email Domain: globalforms.com

Plus, you need to provide a POP3 User Account and Password for Ollie to use for sending e-mails.

YOUR VERY OWN E-MAIL SERVER?
Like the e-mail program on your desktop, Ollie does not actually send e-mails. Instead, it relies on a piece of software known as an e-mail server to actually send the e-mails it generates. Your company may already have an e-mail server, or it may use the e-mail server provided by your ISP. If you are using the e-mail server provided by your ISP this may be the first time you were aware that there even is such a thing as an 'e-mail server'. But there is, and here is why it is important:

When a program like Ollie sends an automated e-mail from a particular address such as ollie@mycompany.com, the ISP -must- allow something called a relay in order for the e-mail to be sent. This is because the From address on the e-mail Ollie generates will not match the From address of the person actually using Ollie. Actually, to be more precise, the domain, meaning the actual computer network Ollie is installed at (your company) is not the same as the network of the Ollie User.

In other words, when rhonda@myformscustomer.com places an order in Ollie, Ollie will attempt to generate an e-mail to acknowledge her order. The problem is that Ollie is residing on your system and is using a From address of ollie@formsdistributor.com. When your ISP's e-mail server sees that someone at 'myformsCustomer.com' is attempting to send an e-mail with a From address of 'formsdistributor.com' it will likely attempt to block this.

The above scenario is called a *relay*--using one domain to send a message from another domain. And relays are generally blocked by most ISPs because this is a favorite technique of hackers and spammers. Why? Because a relay allows one domain to send e-mails for another and though in our case it is perfectly innocent, if you were a spammer, you would use this same technique to send out thousands of weight loss and home finance messages using the ISPs own servers!

If you configure Ollie to use your ISPs e-mail server, instead of purchasing your own, you may run into the following error when you attempt to e-mail from Ollie:

SMTP Error 550.

If this happens, you will need to contact your ISP and see if they can enable relay and/or turn off their anti-spam filters for e-mails sent by Ollie. If they are unable or unwilling to do so, you wil need to install an e-mail server on the Ollie webserver in order to automatically generate e-mails from Ollie.

SUPPORTED E-MAIL SERVERS

Ollie supports most popular e-mail servers, including:

Ipswitch IMail

Microsoft Exchange

Novell

If you have another e-mail server in mind it will likely work since Ollie uses standard protocols for sending and receiving mails.

OPTIONS FOR FORWARDING AND NOTIFICATION

The following options are discussed further on in the On Line Options section of the Customer Master discussion.

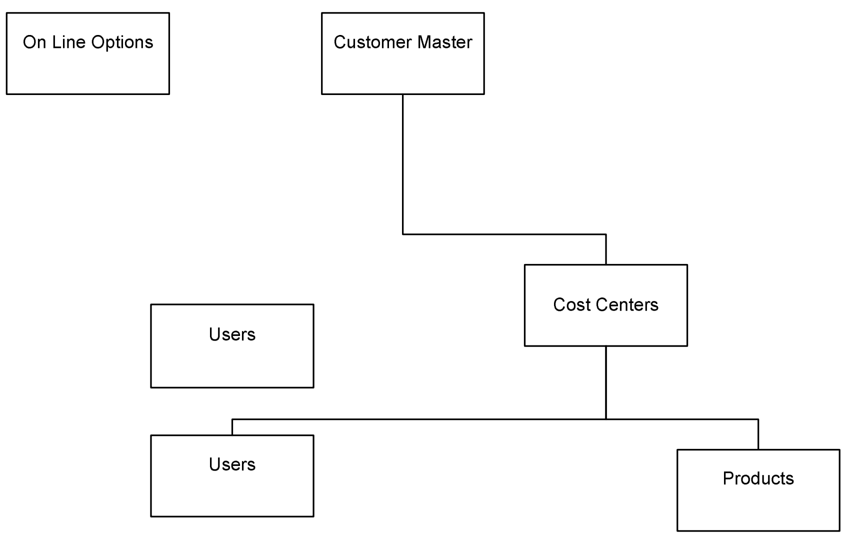
OPTION	DISCUSSION
When An Order Is Approved?	The name of the e-mail server you will be using for sending Ollie-generated e-mails.
Send E-Mail To Purchasing Agent In All Cases?	When any order is approved, a CC of the order will be forwarded to a global e-mail address for this customer. This is typically a purchasing agent for the entire organization. If this feature is not enabled, only orders entered from the Special Products screen will be forwarded to this person.
Send E-Mail To Approver In All Cases?	If this is enabled, a CC of the order is always e-mailed to the approver, whether the order required Approval or not. If this is not enabled, only orders which required approval are CC'd to the Approver.
When An Order Is Cancelled	
Send E-Mail On Proxy Cancel?	If this option is enabled, an e-mail is sent to the original User when an Approver cancels their order.
Send E-Mail On Order Cancel?	If enabled, an e-mail is sent to the User whenever an Order is cancelled.

Void Cancelled Orders?	This is not really an e-mail option, but it bears mentioning. If this option is enabled, when a User cancels an order, the order is put into an 'X' status. An Activity is attached to the Order indicating the person who cancelled the order and the date and time this happened. If the Void option is not selected, cancelled orders are physically removed from SAFE.

Setting Up Your Customers In SAFE

Ollie is very easy to use once you get set up. However, it is important to recognize that each Customer's Ollie will appear to them as *their* program. There are a lot of possible customizations and, if your customer is of a certain size, a lot of potential work involved in getting them started!

So, while you *can* let your Users set up their version of set up Users directly from Ollie, it is far more common to do so (at least initially) inside SAFE. This provides you (the DA) with control over the crucial initial user experience and can save *you* many headaches in correcting mistakes. Finally, it also wins you invaluable 'brownie points' with your customers by showing them how much you care. And the good news is that, if they have been your customer for any time at all, your work is probably already largely complete!



Set Up Your Cost Centers And Users: A User Is A Contact?

Yes, an Ollie 'User' is simply a 'Contact' inside SAFE. We'll use the terms interchangeably, but they are the same thing, just viewed from a different angle: in SAFE they are Contacts; in Ollie they are Users.

Since we are dealing with multiple types of data that are all inter-related, it's probably a good idea to begin by getting familiar with the organization of data in SAFE (and Ollie).

As you can see from the chart below, Contacts are related to a particular Customer. Every Contact assigned to this Customer ID may be a User in Ollie. In order to allow a User to log in they must have a Password, set in their Contact Master.

Customers also have one or more Cost Centers, which are defined in the End User document. A Contact must be assigned to at least one Cost Center, so, even if you don't use Cost Centers, you must create at least one Cost Center for each Customer and assign each Contact/User to that Cost Center. (SAFE automatically creates a Default Cost Center for each Customer so not to worry if this does not apply. Just realize that this is what is happening 'under the hood'.)

A Contact can be assigned to as many Cost Centers as are set up for a Customer. Every Cost Center has a Default Contact. This is the Owner of this Cost Center and is therefore the Approver for the Cost Center (if this Customer is set up to Approve By Cost Center). You can assign Contacts to their Cost Centers in their Contact Master or you can assign all Contacts to a particular Cost Center in the Cost Center Master. Again, if you do not use Cost Centers, SAFE still assigns each Contact to the Default Cost Center 'under the hood'.

Contact/User Specifics

Now let's discuss the fields in the Contact Master that affect Ollie Users. Most of these are set on the **On-Line Options tab**.

Every Contact has a **Dollar Limit**. This is the default maximum for any given Shopping Cart.

Each Contact also requires a **User ID** and **Password**. This User ID must be unique in SAFE. In other words, you may not have two Users with the ID, 'JACKIEO', even if they work for different Customer IDs.

Each User requires a password in order to log into Ollie. This password may require periodic updating, depending on your customer's requirements. If so, enter an expiration date after which the User's password becomes invalid. (If the User logs in within 10 days of expiration they are prompted to change their password.)

If the User's password expires, or they are locked out of Ollie after failed log in attempts, their password will be blanked out. If this happens, you can enter a new password into SAFE an send them an e-mail with a temporary password.
Security Tip: If you issue them a new password, also change the Expiration Date to something like today's date plus two days. When they log in they will be automatically informed to change their password to another value and thus reset their Expiration Date to the normal amount (the default is 90 days.)

Each User can be set up to accommodate various types of approval as discussed in the Ollie End User Document. The **Approve By Cost Center** box acts as the central control for this.

If the Approve By Cost Center box is *checked* then you may not select an Approver Contact for this Contact/User. In that case, approvals are handled by the Default Contact for each Cost Center the User logs into.

If the Approve By Cost Center box is *unchecked* then you should select an Approver Contact ID for this User. (The default is the System Administrator set up for the Customer ID.)
Note: You may not set a User to be their own Approver.

Common Question: How Do I Set This Box If The User Is An Approver?
If the User is also an Approver, you must still specify a different Contact ID as their Approver. In this case, simply use the System Administrator's Contact ID.

Finally, you can control which reports each Contact/User may run in Ollie. This is done by right clicking on the Contact from the Contacts Browse and selecting **Linked Reports**. By default all reports for a given Contact/User are disabled.

Cost Centers Specifics

Each Cost Center has a default Site. This automatically sets this Site as the default for all orders/releases placed using the Cost Center.

You can also Enable Ordering On Behalf Of Other Users for a User at a particular Cost Center.

Customer Master Specifics

There are a number of tables that control the presentation for each customer. These are accessed by right clicking the selection on the Customer Browse and selecting On-Line.

CUSTOM PRODUCT CATEGORIES

This browse lets you create customized lists of Products for each customer. For example, you could create a list for a particular customer called *HCFA Forms* and then assign all related products to this list. This allows the User to instantly view only those products in either the Stock Order or Release pages.

Each Product may be assigned up to eight Custom Product Categories.
Note: Remember that these Categories are customer specific and are completely independent of Product Categories 1-4 which are *global* and thus apply to all customers.

ON LINE ARTICLES

This browse allows you to add a series of 'articles' to the Main Menu. An Article is simply any HTML content, up to 8k bytes in size. Examples, might include:

- Weekly Specials
- Frequently Asked Questions
- Testimonials From Customers
- Customer Service Tips

The easiest way to create this content is to open your favourite web editor (such as FrontPage® or Dreamweaver® and cut/paste from those programs' source.

ON LINE LINKS (URLS)
These are links to external web sites, or to your own web pages outside of Ollie.

DELIVERY METHODS
This list determines which Delivery Methods (Ship Vias) are available for on-line ordering.

ON LINE OPTIONS BROWSE
And last but not least is the On Line Items Browse. This is also activated by right clicking on the selected Customer in the Customer Browse. This browse is very similar to the Global Options Browse in Company Setup. It consists of a number of records customize various aspects of the Ollie experience for that particular customer.

Long Note: One of the most common (and frustrating) problems Distributors encounter is a complaint that 'Ollie isn't working right all of a sudden.' Which is to say, it works differently for one customer but not for the next. Right! *The options for each customer are the options for each customer.* You cannot assume that because Ollie is set up correctly for one customer that same configuration is also set for other customers. If you run into a situation where Ollie is not behaving as you expect, or it's behavior has suddenly changed, check the On Line Options Browse first!

A Quick Legend…
Items in Green may only be edited by Suntower Systems

Items in Red should usually only be edited by your Network Administrator or Suntower Systems

Items in Blue may only be edited by the Distributor Administrator and Suntower Systems

All other items may be edited by either your Customer's System Administrator, the Distributor Administrator or Suntower Systems.

E-Mail Server Configuration
These are usually set by your network administrator.in consult with Suntower Systems. Don't touch unless expressly instructed by us your network administrator or us!

PARAMETER	VALUE	DESCRIPTION
POP3 Server Name	Text	The name of the e-mail server you will be using for sending Ollie-generated e-mails.
POP3 User ID	Text	The User ID of the user account Ollie is assigned to on the e-mail server you will be using. (May not be necessary)
POP 3 Password	Text	The password for the User ID Ollie is assigned to on the e-mail server. (May not be necessary)
SMTP Domain	Text	The domain name of the e-mail server which sends mail. This is usually only necessary if your mail is being sent by a proxy server.

SMTP Server	Text	The server name of the e-mail server which sends mail. This is usually only necessary if your mail is being sent by a proxy server.
SMTP Port	Text	The port the e-mail server will use to send mail. This defaults to 25.

SYSTEM PARAMETERS

These are only set by Suntower Systems. Don't touch unless expressly instructed by us!

PARAMETER	VALUE	DESCRIPTION
ConnectionString	Text	This string lets Ollie connect to your database. Normally you would never touch this!

SYSTEM ADMIN E-MAIL ADDRESSES AND OPTIONS

PARAMETER	VALUE	DESCRIPTION
Enable System E-Mails	0,1	Globally disables or enables all e-mail traffic generated by Ollie.
Email_Print_Footer	Text	Type up to 8k of text (it can include HTML) which will print at the bottom of all e-mails generated by Ollie. This typically includes a privacy statement or other general message.
Send Confirming E-Mails	0,1	Always send e-mails when an order is submitted or the status has changed. Normally this is enabled.
Send 2nd Level Approver E-Mails	0,1	If your company requires two levels of approvers, this box tells Ollie whether or not to automatically send an e-mail to the 2nd Level Approver every time it sends one to the primary approver.
Send E-Mails When Orders Are Cancelled?	0,1	Send the User a confirming e-mail when they cancel an order?
Global E-Mail From Address	Text	The address from which all Ollie e-mails are sent.
Global E-Mail To Address	Text	The general e-mail to which e-mails are sent from Ollie in tracking the status of orders.
Distributor Administrator E-Mail	Text	The e-mail address Users will use to communicate with you. This is separate from the Global E-Mail address to distinguish between order generated e-mail and specific User requests.
System Administrator E-Mail	Text	The e-mail address Users will use to communicate with their System Administrator. Note that this is may

Allow Attachments To User E-Mails?	0,1	be a separate address from the e-mail set in that Contact's On-line setup to distinguish between order generated e-mail and specific User requests. Allow Users to send attachments with their e-mails?

Other Formulas And Ordering Options

PARAMETER	VALUE	DESCRIPTION
Stock Order ID Formula	**Text**	A formula used to uniquely identify Stock Orders generated from Ollie. Note that this can be the same or different from the Order ID used in SAFE.
Template Order ID Formula	**Text**	A formula used to uniquely identify Imprint Orders generated from Ollie. Note that this can be the same or different from the Order ID used in SAFE.
Release Order ID Formula	**Text**	A formula used to uniquely identify Release Orders generated from Ollie. Note that this can be the same or different from the Release Order ID used in SAFE.
Enable Shopping Lists	0,1	Globally turns the Shopping List function on or off.
Imprint Orders: Enable Shipping Address Lookup	0,1	Turns on/off the Select Shipping Address Link in the Imprint Orders page. This feature auto-populates the address fields in the page from a selected Shipping Address.
Enable Order On Behalf Of	0,1	Globally enables or disable the ability of users to order on behalf of someone else.
Alert User If Already Waiting Orders?	0,1	Alert Users if they attempt to start a new order with another order already awaiting approval.
Allow Duplicate Logins?	0,1	Allow multiple logins to the same User ID.
Enable Password Security?	0,1	Check this box to force users to renew their passwords periodically and to demand a stronger formula for choosing passwords.
Password Formula	Text	A regular expression which determines the length and type of characters acceptable in a password. Note: Only applies if Enable Password Security is checked.
Password Renewal Days	Integer	The number of days between Users being forced to renew their passwords. The default is 90. Users are reminded at each log in, 10 days before the Expiration Date. Note: Only applies if Enable Password Security is checked.
Customer Header Logo	Text	The small logo Users see at the Main Menu while using Ollie. Typically this is the customer's logo in GIF

		or JPG format. Note that in order to look it's best, this file should be sized precisely as desired in Ollie. That said, it is recommended to keep this file as small as possible in order to maximize display speed.
Footer HTML Include For Each Page	Text	A file containing any HTML code you would like to display at the bottom of each Ollie page.
Header HTML Include For Each Page	Text	A file containing any HTML code you would like to display at the top of each Ollie page just below the Main Menu, but just above any other screen activity.
Automatically Assign User P.O. #	0,1	The User must enter a P.O. in order to submit an order from the Shopping Cart. Check here to have Ollie automatically assign one for the User.
Maximum Line Items Per Shopping Cart	Integer	The maximum number of line items that may be ordered on a given Shopping Cart.
Use Hi-Res Image For Vendor Pos	0,1	Check this box if you will have a separate folder for high resolution PDF Templates.
Auto-Populate Imprint Orders	Integer	Should the User's bio be used to automatically fill-in fields on Imprint Orders such as 'Name' and 'Address'? There are 3 possible values: 0. No fields get automatically populated. Actually, that's not quite true: If this value is selected, there are 3 other options that *can* come into play. This lets you populate only portions of the address, without the User's actual name. • Address1: Populate the User's Address1 field. • Address2: Populate the User's Address2 field. • CityStateZip: : Populate the User's City, State and Zip fields. 1. The User's contact info is automatically populated, including address 2. The contact info from the User's default Shipping Address (the Default Site in the SAFE Contact Master) are populated.
Language	Text	The language in which static text will be displayed. This also includes date, time, phone number and

		currency formatting.
Out Of Stock Warning	0,1	When entering a Quick Release, do you want users to be warned if the Release Quantity is greater than the currently available On Hand Quantity? **Note:** If you have **Lot Control** enabled in the On-Line Options, then lots which are currently on hold will be not included in the available On Hand Quantity. For example, even though there may be 10M of a particular product in inventory, if a lot of 8,000 is currently being held, then Ollie will only allow a release of 2M.

Product Setup

Still following? Great. Let's talk about Products.

LINKING PRODUCTS TO COST CENTERS

Products may be ordered/released in Ollie if they are linked to the User *and* their Cost Center. Once again, if this Customer does not use Cost Centers, don't worry about it too much; SAFE will simply assign each link to the Default Cost Center for the Customer. The important thing is that the User must be linked to the Product and this is done in the Product Master.

If you *do* use Cost Centers then you'll need to assign each User to a list of Products they are allowed to order or release for each Cost Center.

SETTING UP PRODUCTS FOR EACH OLLIE ORDER TYPE

Releases

All Products linked to a Contact/User may be *released* by that User. That is, they will automatically have the ability to enter a Release Transaction in Ollie using this Product. They will be allowed to release up to the Maximum Release Quantity you enter.
Note: This defaults to the Maximum Release Quantity set in the Product Master, however it can be overridden for a particular User within a particular Cost Center.

Stocking Orders

However, every Product may *not* be ordered as a Stock Order transaction. For that, the link must have the Allow Stock Order box checked in the Linked Product Properties. They will be allowed to order up to the Maximum Order Quantity you enter.
Note: This defaults to the Maximum Order Quantity set in the Product Master, however it can be overridden for a particular User within a particular Cost Center.

Imprint Orders

A Product Master also has a **Spec Style**. If a Spec Style is selected and an Imprint Template has been created (as we'll soon discuss), the Product will be available to order in the **Ollie Imprint Order** screen. In other words: if a Product has a particular Spec Style *and* an Imprint Template, Ollie assumes it is to be ordered as an Imprint Order and *not* via the Stock Ordering screen.

OTHER FIELDS IN THE PRODUCT MASTER

We've already discussed several fields that are used in Ollie orders, but it's nice to put them all in one place:

FIELD	PURPOSE	WHERE USED IN OLLIE
Release Lead Time	The amount of time the Product will take to fulfill once a Release has been submitted	Release screen
Release Std. Qty	The default quantity for a Product when releasing in Ollie.	Release screen
Maximum Release Qty	Limits the User to a maximum quantity. This can be overridden per user in the Linked Products/Cost Centers browse.	Release screen
Minimum Release Qty	You can also force users to release a minimum quantity. Again, this can be overridden per user in the Linked Products/Cost Centers browse.	Release screen
Order Lead Time	The amount of time the Product will take to fulfill once an Order has been submitted.	Stock Order screen Imprint Order screen
Release Std. Qty	The default quantity for a Product when ordering in Ollie.	Stock Order screen Imprint Order screen
Release U/M	The unit of measure	Release screen
Maximum Order Qty	Limits the User to a maximum quantity. This can be overridden per user in the Linked Products/Cost Centers browse.	Stock Order screen Imprint Order screen
Minimum Order Qty	You can also force users to order a minimum quantity. Again, this can be overridden per user in the Linked Products/Cost Centers browse.	Stock Order screen Imprint Order screen
Order U/M	The unit of measure	Stock Order screen Imprint Order screen
Internal Use Only	Prevents Products from displaying in Ollie under any circumstances.	All
F/M Unit Price	The Unit Price users will see.	Release screen
Unit Price	The Unit Price users will see.	Stock Order screen Imprint Order screen
Customer	Free text notes regarding the Product.	Release screen Stock Order screen

Notes		Imprint Order screenProducts screen Shopping Cart
CATEGORIES	These fields are used to classify your Products in various categories.(Duhh!) But if you like they can also be used, in conjunction with the Product Categories table to create a heirarchy of Products from broad to more detailed with up to four levels of detail For example: Checks Continuous A/P Payroll Cut Sheet Expense Reimbursement The advantage of this system in Ollie is that you can make it easy for Users to search by drilling down from the with Products in higher level allows you to further organize each Product ID. Use it for sorting or filtering records on reports and browses. Simple Accounting does not use this field for processing. Category fields are also used to make selecting a Product easier in Ollie or WebSAFE.	Release screen Stock Order screen Imprint Order screen

SPEC STYLES, WEB TEMPLATES AND PRODUCT IMPRINT TEMPLATES

Confused? Don't worry just *yet*.

Web Templates

Ollie ships with a single default Web Template. The Web Template is the screen design you see for Imprint Orders. This default template is the 'kitchen sink'; it contains all sixteen possible fields which may be a part of any Imprint Order.

But certain Spec Styles can trigger different Web Templates, ie. different input screens depending on the product. For example, when users are ordering envelopes, you may want them to only see the address fields; other irrelevant fields such as 'web address' should be hidden to avoid confusion. So, a Web Template is installed which automatically switches to this shorter data input page when the user selects any envelope.

So, you may create several Web Templates to handle the types of Products you sell most. The following Spec Styles can each trigger an optional Web Template.

TYPE	SPEC STYLE ID	SPECIAL NOTES
Advertising Specialties	A	Wearables.
Business Cards	B	
Envelopes	E	
Labels	L	
Letterhead	D	

Note that these are optional. You must purchase Web Templates as needed. When there is no specific Web Template installed, Ollie always falls back to the default Web Template (ie. all fields.)

Web Imprints Provide Enhanced Data Validation

One other reason to install a Web Template is to enable data validation and formatting (as we'll discuss more in the Product Imprint Template section.) The Default Web Template contains no formatting or validation, ie. whatever the user types in is what they get. You may wish to provide them with assistance by forcing data to be entered according to specific rules, eg. Dates in 00/00/00 format, or phone numbers in (555).123.1234 format. If so, then you should have a Web Template installed to enforce these rules.

Web Imprints Are Global

It is important to remember that Web Templates are global. For example, if you install an Envelope Web Template, then all envelopes for all customers will use it's screen and formatting rules.

Beyond Web Imprints
However, if you need tweaking based on customer or individual products, you can use the Product Imprint Templates (described later) to customize the look of the data input on a per Product basis.

So, to sum up…

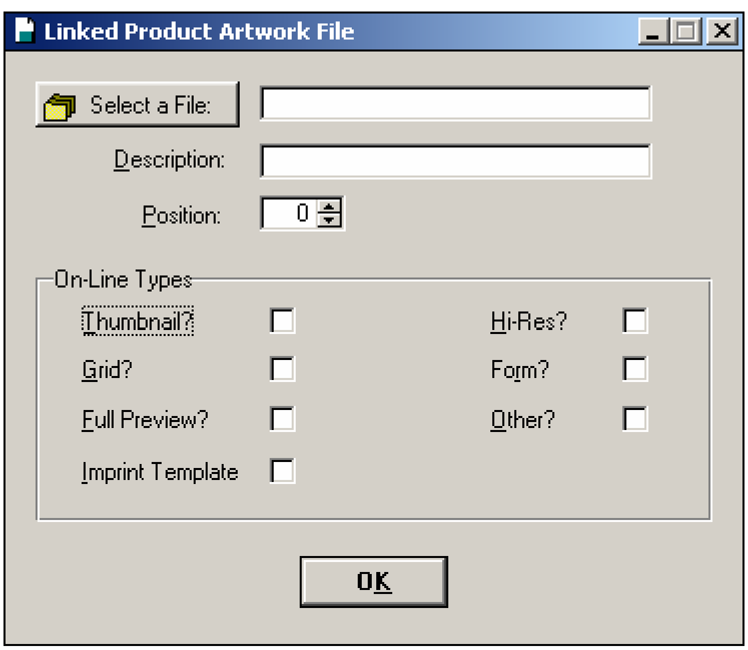
1. You get the Default Web Template which appears for all Imprint Orders by.. er… 'default'.
2. You can install individual Web Templates for each common Spec Style to provide a less cluttered data entry experience or to enforce data entry rules. These are global to all customers.
3. You can customize each Web Template by Product using the Product Imprint Templates in SAFE.

PRODUCT IMAGES

There are several types of images your Users will manipulate in Ollie which are related to the Products they order/release.

Once a Product Image is uploaded to the appropriate folder on your Ollie Server, you still need to link the Product Master to the image. This is done in SAFE in the Linked Files window accessed by right clicking on the Products Browse.

TYPE	ID	DESCRIPTION
Thumbnails	T	These are small versions of images users see in various windows such as the Imprint Order Form screen. These can be in JPG or GIF format.
Grid	G	These are the small images users see in various browse screens. These can be in JPG or GIF format.
Full Previews	F	These are the larger images users see when they click on various browse screens to view an item in more detail. These can be in JPG, GIF or PNG format.
PDF Imprint Templates	I	These are the 'form-fill' documents in Adobe PDF format which are used for Imprint Templates.
Hi-Res PDF	H	These are optional high resolution versions of the 'form-fill' documents. These are sent to your manufacturers to product the final Imprint Order items.
Forms	R	These are documents which you will allow Users to click on and download. These are typically Adobe Acrobat or Microsoft Word documents.
Other	O	Miscellaneous files which you will allow Users to click on and download.



PRODUCT IMPRINT TEMPLATES

Products ordered from the Ollie Imprint Order screen utilize **Custom Product Templates**. A custom product template provides the names and formatting for the form-fill fields on the Imprint Order screen for the given product. Since the number, description and formatting of these fields can be changed for each Product, the Imprint Order screen can accommodate virtually any kind of templated product.

Custom Template Setup

Product Templates are configured by opening the Spec screen for the Product and clicking on the **On-Line Template** button. You then fill out the screen with the number of imprint lines required for the Product as follows:

#	DESCRIPTION	FORMATTING
1.	NAME	(none)
2.	ADDRESS #1	(none)
3.	ADDRESS #2	(none)
4.	ADDRESS #3	MU
5.	OFFICE PHONE #	PH
6.	CELL PHONE #	PH

Formatting Types

Note that in the FORMATTING column for field four we entered 'MU' and in fields five and six we entered 'PH'. These are examples of **Formatting Options**, a very powerful tool for:

- Enforcing proper data entry from your Users
- Generating the proper output for your PDF previews.

These types may combined by simply separating them with a comma.
Be Careful! If you combine incompatible Formatting Types (eg. 'Z' and 'D') your Imprint Order screen may not work for that Product!

Here is a complete list of Formatting Options:

TYPE	DESCRIPTION
PH	(999)999-9999x9999
D	99/99/9999
ST	A drop down list of American States and Canadian Provinces.
Z	99999-9999
EX	(Expression) This actually requires a bit of explaining. This field actually will not be viewed on the Imprint Order Screen. It is used to

	act as a ‘container’ for more complex forms of data; typically where several entry fields need to be combined. A common example is CITY, STATE ZIP. Example: you are using line #6 for city, line #7 for state and line #8 for zip. In line #9 enter ‘EXPRESSION’ in the TYPE field and in the FORMATTING field enter “RTRIM(#IMPRINTLINE6#) & ‘,’ & #IMPRINTLINE7# & ‘ ‘ & #IMPRINTLINE8#” This will substitute the contents of lines 6,7 and 8 into line #9 when the preview is generated.
MU	(Move Up) If this field is empty, substitute the field below for it. The most typical example is the case of formatting multiple address lines. Example: you are using line #3 for address 2 and line #4 for address 3. In line #3 enter ‘MU’ in the TYPE field This will substitute the contents of lines 3 with that of line 4 and leave line 4 blank.
MD	(Move Down) If this field is empty, substitute the field above for it. The most typical example is the case of formatting multiple address lines. Example: you are using line #3 for address 2 and line #4 for address 3. In line #3 enter ‘MD’ in the TYPE field If line #4 is empty, this will substitute the contents of line 4 with that of line 3 and leave line 3 blank.
ADDR1,CITY	Substitutes the contents of the field with a properly formatted concatenation of Address1, a comma, and then the City/State/Zip field. Example: You assign field #12 with ADDR1,CITY as the TYPE of formatting The end user enters the following onto the imprint page: ***Address1:*** *1234 Main Street* ***City State Zip:*** *Royal Oak, MI, 48083* In line #12 of the generated PDF, the following prints: 1234 Main Street, Royal Oak, MI 48083

U	Force to upper case
L	Force to lower case
R	(Required) The User may not leave the field blank.

Creating the Actual PDF Templates

The other step involved in setting up a product for an imprint order, requires creating the form-filled Acrobat PDF documents. This procedure is described later in this document.

Setting Up Your Customers Web Experience

OK, we've set up the data in SAFE. But there's also the matter of setting up various options as to the workflow and look and feel over the web. It's beyond the scope of this document to go into all the specific details, but we want to give you an outline of what you're looking at if you want to take customization to *the next level*.

Why on earth would I want to do this?
That's a great place to start. Because in general, for all our talk about how you *can* customize Ollie, we don't necessarily recommend that you do so. In fact, it is our recommendation that you work with your Customers to get the most out of all the options we've already discussed. In our experience, most of the customizations Distributors try to sell Users involve customizing the look and feel of the program but not the actual things that Ollie *does*. So, although it is tempting to tell each customer that you can make Ollie 'look like this' and 'work like that', your efforts *may* be better served in other areas besides simply providing a new coat of paint. Disclaimer done. Onward.

Now, the reasons customers want customizations tend to fall into these categories:

1. They have a corporate look and feel for applications that they feel it is important to maintain.
2. They have security needs that require a different
3. They have a workflow that simply cannot be accommodated with the standard Ollie.

Now, there are two basic kinds of customizations that can be applied to Ollie:

Global: Customizations which will affect all your customers.

Customer Specific: Customizations which are applied only to a single customer.

Global Customizations

Changes which affect all customers are, in general, easier to manage, since they are shared by all customers. Your employees will find it easier to become comfortable with these kinds of changes since they apply to all the Users they will deal with. The modifications fall into the following categories:

- SAFE Global Options Browse
- Style Sheets
- Global Images

- Global Language
- Custom Scripting

SAFE GLOBAL OPTIONS
These are options in SAFE which allow you to customize Ollie for all your Customers. They are managed in SAFE under the Setup|Global Options Browse by selecting the type 'OLLIE'.

Customer Program Name	Text	**Type the program name you wish Users to see as they run Ollie, eg. "Fred's Grocers Ordering System!"**
Customer Splash Logo	Text	**The main logo Users see upon logging in. Typically this is the customer's logo in GIF or JPG format. Note that in order to look it's best, this file should be sized precisely as desired.**
FDFPath	Text	**This sets the path for storing all Ollie PDFs and FDFs.**
User Customer Specific FDFPaths	0,1	**If set to 1, this forces SAFE and Ollie to store each Customer's PDFs and FDFs in their own folders under the main FDFPath.** **Danger: If you change the Customer's ID in SAFE UTILITIES|Edit ID, then the folder name must be manually changed by your network administrator!**
ImagePath	Text	**This sets the main path for storing all Ollie images.**
User Customer Specific ImagePaths	0,1	**If set to 1, this forces SAFE and Ollie to store each Customer's images and documents in their own folders under the main ImagePath.** **Danger: If you change the Customer's ID in SAFE UTILITIES|Edit ID, then the folder name must be manually changed by your network administrator!**
ForceEmployeeID	0,1	**If set to 1, this forces the Employee ID to a fixed value for all entered Orders or Releases.**
SingleCustomerFilter	Text	**If set to a valid SAFE Customer ID, this limits Users to only those within the specified Customer ID.**
AllowDirectAccess	0,1	**If set to 1, this bypasses the Log-In screen and receives log in information (User ID and Password) from a calling web page.**

STYLE SHEETS
Style sheets are the changes you will most often want to make. Almost every object in Ollie is associated with a style stored in the standard style file, which is located in the Styles folder. Since they will be quite familiar to any web designer, they are quite safe to manipulate (…er… so long as you don't make any typing errirs ☺. Changes you can make include:

- Font sizes
- Type faces
- Font colors
- Color schemes
- Icons

An easy example: You are satisfied with the look of Ollie except for the green/saddlebrown color scheme (since your company uses a blue/yellow-themed logo). To change Ollie to this new scheme you would:

1. Open the standard CSS file in the Styles folder.

2. Change all the standard green color references to 'blue' and all the references from 'saddlebrown' to 'yellow'.

3. Open your image editing software and load all files in the Images subfolder.

4. Use your software's 'fill' tool to replace the greens with lovely shade of blues.

5. Save your images.

Instant extreme makeover! ☺

GLOBAL IMAGES
These include all the icons such as buttons which also contribute to the overall look and feel of Ollie. For example, you may want buttons that are gold and shaped like buttons. If that's your thing, simply replace the global image files with those to your taste---but do *not* change the file names!

GLOBAL LANGUAGE TRANSLATION
All the 'boiler plate' text Ollie uses is actually stored as a series of text files we call a Translation File. You may have translations set up for multiple languages which are customer specific, but there is always a main translation file which is the default for all new customers. There's nothing to prevent you from changing this text to meet your needs.

For example, in Ollie, we use the term Product ID over and over and over because that's what it's called in SAFE. Now, if you don't *like* the term 'Product ID' (or have a streak of evil!) you could open the translation file in your Notepad application, locate the word 'Product ID', change it to 'Gizmo' and save the file. From that moment on, every place in Ollie where the term Product ID used to be, the term 'Gizmo' will now appear.

Note: If you do anything like the above, you will, of course, have to remember that when your Users call you with a question regarding 'Gizmo 12-49044' it actually refers to a Product ID in SAFE '12-49044'.

GLOBAL HTML

Getting into the next level of changes, you can edit the base HTML for each page. Our base warnings apply (in short, 'this is probably not a good idea!) Still, this *is* safe so long as you stay completely away from any commented blocks!!!

But why? (Oh no another lecture!)

At times, our customers (that would be you) have found an aspiring web designer in-house (since you're naturally creative people!) who see these HTML pages and immediately want to spruce them up a bit. That's great, except that we don't want anyone re-inventing the wheel. For example, there is the tale of one person who spent an afternoon learning how to change the background image of every Ollie page to a really neat looking watermark of the distributor's logo, only to find out the following week that this could be effected simply by changing *one line* in the standard style sheet!

GLOBAL SCRIPT CHANGES

Finally, you *can* make changes to the ASP.Net scripting, which is at bottom, the mechanism by which Ollie converts database information (from and to SAFE) into web pages that your Users will see. We do *not* however recommend that you make such changes on your own. Rather it is strongly recommended that you do so in concert with Suntower Systems.

Some changes can be made easily and are rather benign (for example, changing the way dates number and phone numbers are formatted), others are more involved and cannot be safely achieved without taking considerable care.

Customer Specific Customizations

In addition to the global changes just discussed, there are many customizations which can be customer specific. Most of these are addressed inside SAFE, that is, by configuring the database. However, there is one 'biggee' that is configured exclusively in Ollie: Product Templates. In fact it's such a biggee that we're going to devote a whole section to it in a minute. So we'll skip over that temporarily and address the *other* type of customer-specific changes you can make in Ollie.

If you've examined the file structure of your web server (which we discussed earlier) you may have noticed the 'Custom' folder underneath each customer's main folder. This baby is usually empty. But if you have a customer with specific needs, you can include scripts and style sheets here which are unique for those Users' Ollie experience. Thus, you can, basically override almost every aspect of Ollie for one particular customer.

Global Versus Customer Specific Customizations

OK, time for another disclaimer:

The Custom Folder Disclaimer

Over the past three years we have found the following hard truth: The Custom Folder is a bargain with the devil. It offers a tremendous amount of power, but like all such bargains it comes at a cost: be warned! (Muwhahahahahah!)

Once you begin using custom styles and scripting you basic disconnect your Ollie from the fold in two important ways:

1. You are no longer in conformity with our standard code. This is not a trivial point. We are constantly upgrading our code with improvements in features and bug fixes based on the entire community's reports. If you elect to use custom scripting, you lose this connection. In essence, your code is frozen in time. If flaws are found, or new features added to Ollie, you will need to pay to have these bugs fixed or features added to catch up with the standard code base.

2. It becomes more and more difficult to *manage* Ollie as you add more and more custom styles and scripting. When customers call for help, it becomes harder and harder for your people to lose track of what features and capabilities each customer actually has in place. In other words, it becomes harder to remember how each customer's version *should* work.

In short, there is a good reason why conformity is good! It makes your life easier. The goal is to find a balance between giving your customer the flexibility *they* need without losing *your* mind.

Creating Custom Imprint Templates

Earlier we discussed setting up each Product Master in SAFE for Imprint Orders in Ollie. We also said that in addition to setting up the fields for imprinting in SAFE, you will also actually need to create the Adobe PDF which acts as the container into which the fields are *filled*.

The PDF format is, of course, the industry standard and justly so! The PDF format provides resolution up to 2400 DPI making it suitable even for ultra-high resolution artwork. And since the PDF form-fill documents (from here on referred to as **PDF Templates**) can accommodate virtually any type of document you can offer your Users the ability to order virtually any type of document.

Ollie will place the end-user's variable data (name, address, city, phone numbers, etc.) into the PDFs, using it's fonts and colors, creating an essentially 'finished' piece of artwork that the user can preview onscreen and which can later be automatically forwarded to your manufacturer.

Installing PDF Templates On Your Server

In order to generate PDF Previews, you must install the PDF Templates on your Ollie server. Remember: the template is a version of the final artwork without the variable data (name, address, street, etc.) which will be replaced for the final preview that your User will see (and that will be sent to manufacturing when you generate a SAFE purchase order.)

PDF Templates should be installed as follows:

- They must be named *exactly* the same as the Product ID to which they will be assigned. For example, if the Product ID you wish to preview is called 12345BUSCARD then the name of the Preview Template file should also be 12345BUSCARD (the extension depends on which preview type you use below.)
- All Preview Template files should be stored in the PUBLIC folder of your Ollie Server, along with your thumbnail graphic files.

Creating PDF Templates

You will create your PDF Templates using any software which can generate Acrobat PDF compatible documents and which supports form-fill fields. We recommend that you stick with Adobe's Acrobat for the sake of compatibility. The procedure is:

1. Using Acrobat (or other PDF creation software) create a PDF version of your form. You should set the following Document Options in your PDF:
    - On Page Close: Reset All Form Fields

- Hide ToolBar and Window Options

Note: if you do not set these options, the end user may accidentally modify your template PDF!

2. Using Acrobat, place individual fields on the form exactly where you would like the text replacement to occur. In the 'Default Value' for each field, use the names in the appropriate places on the PDF. Each of these names should be entered as follows

   #IMPRINTLINE1#
   #IMPRINTLINE2#
   #IMPRINTLINE3#

   …etc. And they should be entered in the order in which they are displayed on screen in SAFE in the Product Template Browse for that Product.

3. Name your PDF MYPRODUCTID.PDF. For example, if the Product ID you wish to preview is called 12345BUSCARD, then the Preview Template file should be named 12345BUSCARD.PDF

4. Place the file in the PUBLIC folder for the customer.

AN EXAMPLE
A PDF Template might start out looking something like this:

And then, after you enter your form fields using Acrobat it looks like this:

User Esther Mater then goes into Ollie and enters the following fields into the Imprint Order screen:

NAME	Esther Mater
ADDRESS1	123 Main Street
ADDRESS2	Actuarial, WA 98909
ADDRESS3	
OFFICE PHONE	(360)555-1212
CELL PHONE	(360)555-9089

And then when she presses the PDF Preview button, she sees the following preview in Ollie:

Output Files In Ollie

When the user saves their Imprint Order, Ollie generates a special file with the extension .FDF. The file name will be:

CONTACTID+PRODUCTID.FDF.

So for example, if the Product ID you wish to preview is called 12345BUSCARD, and the User's Contact ID is 48023 then the generated Preview will be named:

4802312345BUSCARDANNE06.FDF.

If you recall, this file is stored in customer's PUBLIC folder. The FDF file contains the imprint information and a link to the original PDF Template, which never leaves your server.

When users click on the PDF Preview button in Ollie, they are opening this FDF file which, through the 'magic' of Adobe PDF Forms displays the filled-in PDF. To your users, this looks and just as importantly, prints exactly as if the PDF had been generated just for them---because, in a way, *it has*!

E-MAIL OPTIONS FOR FDFs

If your E-mail is so configured, this FDF will be automatically attached to the confirming E-mail a user receives when the order is placed.

When you generate and e-mail a purchase order to your vendor, this same FDF is attached to their P.O. which they can also open and use to print directly from.

CLEAN-UP

It is not necessary to keep old FDF files since they are re-generated for each new order. Therefore, if disk space is at a premium it is perfectly alright to delete FDFs after their order has been processed.

Tip: Some DA's may archive these as they act as *proof* of a User's data entry in case of disputes over such things as typos.

Processing Orders In SAFE

Ahhhh, the moment you've been waiting for. Orders are being entered in Ollie. Now what?

Now, we look at how to identify orders when they show up in SAFE, how to process those orders, and how to help users when they have difficulties.

The Sales Transaction Browse

All orders, regardless of their status appear in the Sales Order Browse. On line orders are characterized by their Contact ID, a User ID, an Approver Contact ID and a Cost Center.

The Contact ID represents the person for whom the order was placed. This is either the person who logged into Ollie unless the logged in User was order ***on behalf of*** this Contact ID.

The User ID is the actual User ID who logged into Ollie and entered the order.

The Entry Date and Time represent the exact time the order was created in Ollie by the User ID.

The Approver Contact ID is the Contact ID of the person who approved the order (duh!). But it's worth mentioning that, if the order required more than one approval, this will contain the Contact ID of the last person to approve the order; in other words the *final* approval which triggered Ollie to move it into the 'live' order status.

The Cost Center, is of course, the Cost Center for which the order is applied.

ORDER STATUS

Ollie Orders in the Sales Transaction Browse may be identified by their Order Status.

ORDER STATUS	DISCUSSION
U	The order has been created by the User and has not been submitted. **What it means?** This simply means that there are one or more items in the User's Shopping Cart. **What you can do?** SAFE will allow you, the DA, to cancel the order, however you may not edit the order.
W	The original User ID has submitted the order and it is' not waiting for approval. **What it means?** The order is simply means that there are one or more items in the User's Shopping Cart. **What the User can do?** Once the order is submitted, the original User may not edit the

	order, since it has left their Shopping Cart. However he/she may still cancel it by going to the Ollie Item History screen. **What the Approver can do?** The Approver will receive an e-mail indicating tha the order requires review and approval. The Approver can either approve the order, send a note back to the User requesting revisions, cancel the order, or, if allowed, edit the order outright. All this he or she does from the Ollie User Manager. **What you can do?** SAFE will allow you, the DA, to cancel the order, or approve the order, however you may not edit the order.
Q	The order has been approved (or the order required no approval) and is now 'live'. **What it means?** The order is ready to fulfill. **What the User can do?** If the customer only allows one unapproved order at a time, this means that the User is now free to enter a new order. **What you can do?** Go for it! The order is now waiting in the On Line Approved tab of the Sales Transaction Browse.

Additionally, each Sales Order will also carry over the **Purchase Order Number** and **Customer Notes** the User entered when they submitted their Shopping Cart.

Inside A Sales Order Created By Ollie

Keep in mind that an Ollie order may consist of not only multiple line items but also multiple line item *types.* Which is to say that there may be items to be Released from inventory *and* items to be manufactured *and* items to be drop shipped *and* Imprint items with attached artwork (PDFs). How to keep track of it all?

Each line item generated from Ollie has the following characteristics which the User selected in their Shopping Cart:

- A shared Ship To address.
- A shared Ship Via
- A shared Needed By date

But as important as the information each line item shares, is the information it doesn't. And this includes:

The **On Line Order Type**, which indicates from which screen the line item originated:

On Line Order Type	Order Screen In Ollie	Line Item Type In SAFE	Notes
R	Release	R	
S	Stock Order	N or E	If the line item was added directly from the Stock Order screen, the SAFE Line Item Type is 'New'. If it was added by clicking on the 'Add From Previous Order' cell in Ollie's Item History screen, then it is marked as 'Exact Repeat'.
T	Imprint/Template Order	N	

Linked Art Work: If the On Line Order Type was 'T' then there will be a PDF and FDF file attached with the item. This is automatically forwarded to the manufacturer if you generate a Purchase Order and then e-mail directly from SAFE using the PDFXtensions™ option.

SAFE Reporting For Ollie

Now even though Ollie contains many useful reports, you will find that your customers will still want reporting which is unavailable in Ollie. Further, due to security concerns, they may not *want* web-based reports but rather prefer that you (the DA) provide them with reporting.

SAFE provides a number of reports as part of it's suite of **Forms Management** features which are designed to handle this. These reports are accessed via the Customer Browse by pressing the 'Print' button, then selecting Reports and Forms Management.

Forms Management reports have several advantages over the standard SAFE reports:

1. They are customer-specific. This means that they gather data for the selected customer automatically.
2. They may be modified to suit particular customers. For example, you may have several versions of any given F/M report---depending on the type of customer you are serving.

And of course, each report also has the attributes of any SAFE report, including:

1. The ability to be printed as an Adobe Acrobat PDF.

2. The ability to be easily converted to an electronic format in tab or comma delimited format.

Each of these is discussed in detail in the SAFE On Line Help.

Session And Site Management

It is a truism that every web site requires a web master. No matter how plug and play is your Ollie setup, there are routine maintenance procedures that should be followed. These generally fall into two broad categories: System and Human:

System Management

These tasks fall can be classified as follows:

Periodically monitoring web server performance:

- Meterics such as:
    - How many sessions are running?
    - The average number of sessions running?
    - The maximum number of sessions running?
    - Disk space being used?
    - Memory being used?
    - Who is logging in (and from where!)?

    All these can be checked in your IIS and Windows Event logs. In fact, you can easily set up to be alerted whenever certain parameters are being exceeded, such as

- Do there seem to be any rogue sessions---sessions which are from suspicious users or which have been inadvertently left running?

Running periodic maintenance procedures on your server

- Defragging your server hard drives
- Resetting your web services. This is a good idea to do periodically as it flushes memory which gives your web services something of a ‘fresh start’.
- Backing up your data!!!!!!!!!!!!!!!!!!!!!!!! (there aren’t enough exclamation points for this one.) We could spend an hour on this, but for Ollie’s sake, at a minimum you should be backing up:
    - The entire Simple Accounting folder, including all subfolders

- The folder where your SQL Server databases are located (Don't know where that is? Then ask!!!! It's your data!)
- A complete backup of your server. If possible this should be done using an **Imaging Utility** such as Norton Ghost™ or PowerQuest DriveRestore™. This type of backup makes an exact duplicate of your disk to DVD so that you can immediately restore if your server hard disk is destroyed.
- A Windows **Emergency Rescue Disk**. This can be used to re-boot your server to a last know good point in case of some problem which is preventing Windows from booting properly.

Keeping your system software up to date, including:

- Server software
- Anti-virus
- Anti-spyware
- Firewall

It Ain't Rocket Science…

There is a myth, often espoused by people who make their living selling computer services, but just as often propagated by 'computer-phobes' that all this is beyond the capacity of small companies to handle in-house. While some of these procedures may be new territory for you, *none* require the services of a 'professional' and none require more than a few minutes of effort per day. Our advice is, if you can, do it yourself and only bring in a networking professional for setup and or big troubleshooting issues. That said, as we said before, you simply must have the phone number of a quality networking specialist available in the event of an emergency. This is not optional!

That said, those few minutes per day *are* essential and you are advised to make certain that you delegate someone to learn these skills and then execute the above tasks faithfully. Your business depends upon it!

SOME RESOURCES

Besides *us*, the aforementioned network specialist can also provide suggestions for learning what you need to know to perform these tasks and many will happily provide hands on training at a quite nominal cost. Additionally, we recommend the following:

1. Your Windows Server Documentation. There is an amazing amount of very well written documentation and step by step tutorials available right at your server console. Topics relevant to our task list include:
    a. How to use the built-in defragger

b. Monitoring the IIS and Server Event Logs

c. Cancelling IIS sessions

d. Setting up new network accounts

e. The built-in backup utility

f. Restarting IIS

g. Creating an Emergency Rescue Disk

2. www.microsoft.com In addition to the built-in help system, you would be amazed at how much information you can here. A favorite spot is the series of forums where you can get personal answers to your questions by Microsoft pros as well as other users: http://www.microsoft.com/windowsxp/expertzone/newsgroups.mspx

3. The documentation included with your backup software, and other utilities such as anti-virus, anti-spyware and firewall. (The good news is that you rarely will need to reference these once they are set up.

4. The Windows Secrets Newsletter (www.windowssecrets.com) This electronic newsletter, published by renowned Windows columnist Brian Livingston contains weekly tips on how to run Windows safely—including warnings on security bugs, unbiased product recommendations and techniques for keeping your system up to date the *right* way. It is a must read for all computer administrators.

User/Site Management

Handling user issues can be generally divided into two classes

1. Site issues: those where the site is not responding as expected.
    a. Is the web server responding? (You might try rebooting the server or IIS if not.)
    b. Is there a problem with your ISP? (Do you have your ISP's phone number on speed dial?)
    c. Is there an issue with the *way* Ollie is responding? (In which case, of course, contact Suntower Systems!)
2. User management
    a. Reactive
        i. Is there a rogue order in the system (an order which does not belong)?
        ii. Resetting User passwords and permissions.

iii. Are there suspicious sessions? (try saying *that* five times fast) These are sessions which have been active longer than expected (eg. more than an hour) or which have an unfamiliar IP address.
Tip: You can learn how to automatically be alerted for these by reading up on your IIS documentation.

b. Ongoing

i. Uploading new content, including new PDF template, image previews.

ii. Setting up new users.

iii. Providing training for your personnel and your end Users.

Some HR Advice On Your Webmaster…
Some unasked for advice on the person you select to manage your web site.

TIME IS FLEETING!
Hopefully you can see that the person responsible for your web site will also need to be able to respond quick to reactive tasks, but also have the necessary time to perform ongoing tasks as well. We're not saying that 'webmaster' needs to be a full-time position; for most of our clients this is far from the case. However, this person must have the flexibility to respond to user needs *quickly*. In other words, this position cannot be an afterthought if you're to have happy Users. It would be best to think of this person as a webmaster who usually has time for other tasks, rather than as a <fill in the blank> who just happens to run your web site. Trust us: that mindset is a recipe for disaster.

QUALITIES
The person you want in this position needs to be multi-talented. From the above discussion it should be clear that this individual should have some knowledge about how your computers work, how SAFE and Ollie work *and* how your business runs. That's a lot of knowledge! And on top of that, you want someone with some people skills since they will be dealing with Users who will usually only be contacting them when there is a problem. And remember: those Users probably don't like computers as much as your webmaster. So again, don't consider your webmaster as an afterthought—for most of our clients, they are as important to business success as any salesperson and should be treated with similar respect.

Oh, and one final note: notice that, among all the qualifications we listed above, nowhere is there mention of 'graphic arts' or 'web designer'. We've noticed that a lot of our clients will look to budding web designers, or employees looking to develop such skills, when attempting to find a webmaster. We feel that this is a mistake. In fact, 'design' will likely play a very small role in the job. It is far better to find someone with accuracy, people skills and a willingness to learn, than someone with a high 'creativity factor'. While your webmaster will occasionally be called upon to work with images, these tasks are fairly routine.

Frequently Asked Questions

What software do I need to run Ollie on my own web server?	1) Ollie 2) SAFE! 3) A Microsoft Windows Server and IIS. 4) A fixed IP connection to the internet, preferably with your own domain name. 5) A software program which allows you to create PDF form-fillable documents such as Adobe Acrobat®.
How much disk Space will be required?	If you're already using SAFE, the answer is likely 'not much'. The Ollie scripting actually takes almost no disk space. What *will* take up disk space are all the image files you will load for your customers. Therefore, you can accurately gauge your space requirements by totaling the number of bytes in all the PDFs, GIFs and JPGs you'll be using for all your customers.
Can Users see each others orders?	Each user sees only his/her own orders. Only users designated as Administrators for a particular Site may have access to all orders from that customer. Further customization may be achieved using Simple Accounting Security Extensions
Can Users see a preview of what they are ordering?	Yes! You may link a graphic to every product (both full-size and thumb-nail). Plus, on Imprinted Orders, users can view an Adobe Acrobat PDF® of their item which includes their merged data, including specs and imprinting on screen!
What about other types of files? Can Users download or print documents?	You can also link products to many other types of files, such as Adobe Acrobat PDF® files. This allows users to view important documents and print them on demand.
How many Users can run Ollie simultaneously?	By default, 50. If you need more than 50 simultaneous users, additional user licenses are available from Suntower Systems. Note, however, that the maximum number of simultaneous users also depends greatly on the performance of your web server.
Is there a way to hide various Main Menu options such as Reports and Stock Orders altogether?	Yes. If the User has no reports enabled then the Reports menu link will not be available. Likewise, if the User has no Products which they are allowed to order, then the Order New Stock menu link is also invisible. **Reminder:** Linking Reports and Products to Users is done in the SAFE Contacts/Users Browse.
How is Ollie configured. Who decides which Users can do what?	Since Ollie is essentially a 'front-end' for SAFE, configuration of Users and Administrators is initially done for you by your Distributor Administrator. After that, Users may be added by your SA.
What about security? Could someone break into our site?	Ollie may be installed on your Intranet and subject to all your in-house security requirements. Only Port 80 is used for data transmission and no applets are transferred to end-user desktops. If the Ollie server computer is to be kept separate from the SAFE server, a connection *is* necessary between these two machines, but again, this can be part of your Intranet and does not need to be exposed to any external Internet traffic.

Optionally, Ollie can use the *Secure Sockets Layer* (SSL) found on most Web servers. This is the encryption standard of the industry. It prevents unauthorized users from intercepting your data off the net. Your Processor can also implement data encryption to SAFE data files to prevent users from copying Ollie or SAFE data to other computers.

Can we customize the look and feel of our web site?

To a very large extent the answer is 'yes'! In order to keep Ollie economical, many features of Ollie are pre-configured to meet the needs of the widest variety of Users. However, many aspects of Ollie *are* modifiable to taste using standard HTML and style sheets. These include:
- Color schemes and fonts
- Logos and graphics
- All function icons
- Imprint Order Templates
- The language presented to users

Additionally, custom programming is available for more specialized needs.

Can we present links to other on-line ordering systems, such as office supplies?

Yes. We provide a complete XML specification for electronically transferring orders from most providers. There are pre-defined links for leading companies such as United Stations and Boise Cascade. Additional links can be installed to accommodate virtually any modern e-commerce system.

You can also provide static links to other sites from within Ollie using a custom HTML include file. (This lets you add links, graphics and text to the Main Menu screen.)

Can we prevent some users from accessing Ollie while still allowing them access to general information?

Absolutely! As described above, there are many tools your System Administrator can use to limit Users to only the functions they need. At the most basic level, each menu choice and report may be enabled or disabled by User ID. Further, each User may be configured to review only orders from their own Cost Center.

Additional limits on ordering may also be imposed, including:
--Product Category
--Order Quantity of a particular item
--Dollar amount per item
--Dollar amount per order
--Dollar amount per time period

How We Can Help

If you've been concerned about the complexities of e-commerce, don't worry! We can help get it all together for you in the following ways:

- We provide ongoing technical documentation and instruction over the internet, including multi-media tutorials for all major functions of Ollie and SAFE. Contact your Processor to obtain these..
- We can sell or lease you all the hardware you need. As Authorized IBM Network Resellers, we have the expertise to get you installed and running the right way. We will pre-install and test Ollie so it's ready to run the moment we flip the switch. And we'll back our work with a three year warranty.
- We can provide the Networking Solutions you need to connect users in your office, remote offices, customers and salespeople on the road.
- We can set you up with an ISP if you wish to host Ollie remotely. We can pre-install Ollie on their server and take care of all the paperwork necessary to getting your WWW address.
- We can come to your site and provide comprehensive training on the use of Ollie for both your network administrator, office employees, and sales people in the field.