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White Paper on Iciniti's eCommSuite.NET



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PURPOSE

The purpose of this White Paper is to give the reader an in-depth knowledge of Iciniti's eCommSuite.NET™ of Products as well as a quick background of how they evolved to their present state.

Originally, Iciniti Corporation® created a tool set for developing integrated and highly customizable, transactional¹ websites. This tool set was targeted at Value Added Resellers (VARs²) of mid market accounting systems such as Great Plains, ACCPAC, Solomon, MASS 90 etcetera. To show the flexibility and power of their tool set (Iciniti Enterprise) Iciniti developed several exceptionally functional but very cost effective web sites for clients in North America and around the world. The problem with the original concept was that VARs had little or no interest or capacity to handle web development projects of this magnitude, and as such the design and development was left to Iciniti staff. This greatly limited the company's ability to grow because of the amount of time and resources that went into each custom project.

In mid 2001 Iciniti took the best features from their various custom sites and bundled them into an "Out-Of-The-Box" product; one which the VARs could sell, but that Iciniti would install and do any custom changes for. The product was called e-Comm Suite. Although e-Comm Suite met its goal of being a very cost effective and highly functional e-commerce solution for mid market companies, it was still very time consuming to install and the fact that it required Iciniti to make all of the customizations meant that Iciniti became a bottle neck to the channel.

In the fall of 2003 eCommSuite.NET was completely rewritten using Visual Studio .NET. The main purpose of this rewrite was to separate the code that defined the web pages from the code that integrated the application into the accounting system. The new product; eCommSuite.NET has three distinct layers;

- The Presentation Layer (Web Pages); Although eCommSuite .NET is delivered with a standard set of web store pages, web developers can easily modify or replace these pages to customize the look and feel of the site to meet their corporate goals.
- Business Layer: Is source code that is exposed to web developers to allow them to link the modified Presentation Layer to the Integration Layer.
- Integration Layer; A set of components and classes that handle the transactions between the web site and the accounting system

With the advent of eCommSuite.NET mid-market companies now have available to them a cost effective, fully integrated e-business solution that is quick and easy to deploy, but still allows them to fully customize it to meet their business needs.

FEATURES

To meet the needs of the mid market, Iciniti's eCommSuite.NET not only needed to be feature rich itself, it needed to be able to extend the feature set of the

¹ Transactional web sites are ones in which buying and/or selling takes place. These differ from informational web sites, which act simply as electronic brochures.

² Most mid-market accounting systems do not sell directly to end users but use dealers or resellers generally referred to as VARs (Value Added Resellers) to sell, install and support their products.



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accounting systems it integrated with, in order that they might better handle the unique requirements of customers shopping on the web.

INTEGRATION

One of the most important features of eCommSuite.NET is its deep integration to the accounting systems it supports. This integration allows companies to reduce cost by having web orders flow directly from the web store into the accounting system without any human intervention (other than that of the person placing the order).

In addition to Order Entry integration eCommSuite.NET integrates to Inventory and Accounts Receivable. Integration to inventory reduces the management cost of a web store, because items can be updated in Inventory and those updates will flow through to the web store automatically. For example:

Inventory

- **Price Changes:** can be made in inventory and will roll up to the web store automatically.
- **Sale Items³:** Some accounting systems allow for items to be placed on sale for a specific date range i.e. from March 1 through March 15 an item or group of items will be on sale. Iciniti's integration to the inventory system means that once an item is flagged in Inventory as being on sale, the sale price flows through to the web store.
- **Customer Specific Pricing:** If different price levels are offered to different clients these price levels will be instantly reflected at the web store when the client logs on. If the client does not have an account in the accounting system, then standard retail pricing will be offered (provided you sell to non-account clients).
- **Catalogue Pictures⁴:** simply by naming the picture of an item the same as its inventory item code, the picture on the web site is automatically linked to the inventory item. Example;
 - **Inventory Item** – blkvst379
 - **Catalogue Picture** – blkvst379.jpg

Accounts Receivable

- **Account Maintenance:** AR Master information is available to the website. This area shows the client number, their billing address, credit limit, outstanding balance, last invoice balance, last invoice date and number of open invoices. It also shows the price list and tax group the customer is assigned to as well as their shipping addresses. When account maintenance is accessed from the Sales Reps view this area has the added ability to turn off the customers right to purchase from the web store.
- **Order History:** The system allows end users to drill down into orders placed both on the web and from within the accounting system to see line item detail and status of orders. Information shown is Order Number, Order Date, Company Name, Status and Order Total. In drill down the full line item detail of the order is displayed.

³ See Admin Tools

⁴ See Admin Tools



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- **Account Transactions:** Displays invoice and payment history for the account. This information is drawn directly from the accounting system and shows Document Type, Document Number, P.O. Number, Document Date, Due Date and Discount Date as well as Document Total and Balance.
 - **Pay invoices on-line:** eCommSuite.NET display open invoices on line and allows you to select particular invoices and pay them via credit card.
- **Change Password:** Allows users to change their login password.

Order Entry

- **Order Status:** Web users can look up an orders status to see where it is in the process.
- **Order Drill Down:** web users can drill down through an order to see the order detail in the accounting system.

Credit Card Payment Processing

Iciniti recently released Credit Card Payment Pro™, which integrates credit card payments from the web store through to Order Entry and on into Accounts Receivable. Although Credit Card Payment Pro is integrated with eCommSuite.NET it is also able to run as a direct add-on to order entry to handle your phone and fax orders where no web store is involved. For a detailed White Paper on Credit Card Payment Pro go to the Iciniti web site www.iciniti.com

VIEWS

As much as integration is a key feature of eCommSuite.NET, integration without thought for who may be viewing this information could cause problems. Therefore, eCommSuite.NET offers multiple "Views" of the data. A View is simply a way for a user to see or view their data. The view for a web customer⁵ would be different from that of a client that had an account and terms with a company, and would differ again from the view that a sales rep may have of the data. eCommSuite.NET ships with four standard views; web customer, account customer, sales rep⁶ and admin. Each view can be customized to meet the needs of the user viewing that data - example; an account customers view can be customized to only show the inventory items they are allowed to purchase, at the price they are allowed to purchase them for. Whereas a sales reps view may show only the reps clients, only the appropriate inventory items for those clients and the correct pricing for each client. A view allows companies to custom tailor the information they show each user type.

PERSONAL CATALOGUE

Many features within eCommSuite.NET are designed to enhance the experience of repeat customers. Studies of our clients showed that many of their clients purchased a small number of inventory items over-and-over again. Personal Catalogue was developed to assist these customers. Person Catalogue is a subset of the main catalogue, made up of items that any particular customer has purchased within the last twelve months. The

⁵ A Web Customer is one, which has no account with the company they are buying from. This is simply a retail client purchasing through the web store.

⁶ See Sales Rep Desk



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Personal Catalogue allows a user to log on, go to the Personal Catalogue and shop from a list of items that they have purchased before. Therefore if the client consistently buys the same items they can quickly go to their Personal Catalogue and find the item without wading through hundreds of items in the full corporate catalogue.

CROSS MARKETING

Iciniti eCommSuite.NET offers two ways to do cross marketing. The company that owns the web store controls one, and the other is created dynamically from sales history.

Related items

A company creates related Items when they want to show a relationship between the purchased item, and other items that a client may be interested in. As an example, if a client purchases an executive desk the vendor may want to point out desk lamps, or chairs or, desktop calendars that they have available. These may or may not be sale items; the vendor simply wants to show that there are related items that the client should consider. There can be an unlimited number of Related Items.

Customers who purchased this item also purchased...

As sales history is built up in the system a dynamic cross marketing tool comes to life. When a customer selects the item detail screen for a particular inventory item, the dynamic cross marketing tool looks at every order in the last twelve months that has the selected item on it. It then instantly calculates what the top four items were that were purchased with the selected item, and populates the screen. This information can be valuable for the customer and invaluable to the vendor.

MARKETING

It was mentioned in the section "Views" that Iciniti can be accessed by multiple user types. One of the login types mentioned is the Web Customer. Web Customers can have to login types Web Users and Web Login Users. A Web User is someone who shops at your website without logging in at all. This is simply a retail customer who comes and makes purchases. However, during the course of making purchases they must fill out certain forms, which identify them with items such as name and address. Web Login Customers are again retail customers with no account or terms in your accounting system but which have been given a user name and password so they do not have to enter their billing and shipping information each time they come to purchase.

Iciniti stores all of this customer information in database tables on the website. This information is invaluable when it comes to data mining. By setting up SQL queries a company can find customers who have repeatedly bought from them, but whom have no account. They can track purchases and preferences even outside of the accounting system. A future enhancement for eCommSuite.NET is to integrate it directly with CRM systems so that these customers become leads for sales reps to track.

This data can also be used as a basis for developing a customer loyalty program to drive more business to your site.



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FEATURED ITEMS

Featured Items is another user-defined section that showcases new or discounted items that a company wants highlighted. Typically the featured items are displayed on the first page of the web store as customers enter.

SPECIALS

These are items that have been marked as being on sale in the accounting systems inventory. Once marked in the inventory as a "special" item they are automatically populated on the web store. If the web store is using a multi category structure to its catalogue, then the specials in each category are displayed separately. This way a client can easily find the specials they are interested in.

MULTIPLE COMPANIES

Often companies have multiple corporate identities running off a single accounting database. eCommSuite.NET allows for these situations, giving each corporate entity its own look and feel and view of the data. This can greatly reduce costs for a company wishing to participate on the web, as they can purchase a single set of web applications and run multiple businesses from them.

THEMES

Each web store has a Theme, which represents the company's efforts to brand itself. Each theme is made up of a color scheme, buttons, images, fonts and the company logo. Creating or modifying a theme can be as simple as using the supplied Admin Tools to drop in a logo and change colors, or as complex as a completely customized look and feel. Because a web store is an extension of a companies marketing image, and because it is important to have consistency in that image, the ability for end users to create and change themes is a valuable tool.

Although the Theme is still an important concept in eCommSuite.NET for companies that want to get up and running quickly, the new capabilities for end users to fully customize a site to their liking go far beyond the simple capabilities of the Theme.

ADMIN TOOLS

A key design criterion for eCommSuite.NET was for the end-user to be able to manage the site efficiently and effectively once it was up and running. For this reason Iciniti has developed several administration tools designed specifically to aid in managing the site.

VIEW/EDIT USER LOGINS

The View/Edit User Logins tool allows the site administrator to add or edit individual Administrator, Account Customer, Web Customer and Sales Person users to the system.

CREATE CUSTOMER LOGINS

The Create Customer Logins tool allows the site administrator to add Account Customers in bulk and assign default passwords to each account. The password can then be changed by the end user on their next login.



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DEFAULT WEB CUSTOMER SETTINGS

Web Customers do not have an account set up in the accounting system so they are typically posted to a single cash account. This tool sets the defaults for that account.

EXTENDED PRODUCT INFORMATION

The Extended product Information Tool gives the site operator one easy place to go to manage the key elements of the items sold on the site.

Featured Item

The site operator can set an item to display as a “featured item” simply by clicking on the check box

Related Items

To create related items the Administrator can either type a word or part of a word into the field beside the Locate button. Once the Locate button is clicked the a list will be generated with part numbers or descriptions that match the search criteria. If the Locate field is left blank, all items in the inventory will be displayed. Select the items you want to relate by clicking on them (CTRL Click and SHIFT Click works as in all windows application). Continue until all related items are added.

Extended Description

Most accounting systems have very limited space to describe an inventory item. For that reason descriptions become quite cryptic; “drk oak 72in exec dsk” hardly does justice to a hand crafted, six-foot executive desk with a dark oak finish and a luster so bright you can see yourself in it. Extended Description Manager allows you the room to create a more vibrant description of the products you sell. And because it is HTML you can add not only descriptions but drawings or schematics as well.

PRODUCT CATEGORIES

Generally speaking when companies set up their inventory numbering system they were not contemplating having it viewed as a catalog by people outside the company. e-Commerce changed all that. For that reason Iciniti built into its Admin Tools the ability for companies to order their inventory into user-friendly categories and sub-categories. Using Category Manager you can quickly and easily generate a reasonable category structure and then drill down on a per item basis as needed. Items can even be in multiple categories without requiring multiple inventory items.

ADDITIONAL ADMIN TOOLS

In addition to the tools listed above Iciniti has added tools for managing images, taxes, shipping and connection to the databases. Examples of the tools are listed below.

- Missing Product Images
- Featured Item List
- Default Order Entry Settings
- Configure Payment Gateway Account ID
- Configure e-mail settings



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- Configure Plugins
- Select a Theme

CUSTOMIZATION

The information above defines the basic out-of-the-box product from Iciniti. However, over the years Iciniti has done countless customizations for various companies. Some examples are;

- Clothing size and color grid
- Shopping carts that can be mailed as a gift suggestion and that when opened return the user direct to the checkout at the web-store.
- Credit monitoring that forwards certain orders to a credit supervisor if they fall outside of acceptable guidelines.
- Custom sales order desks
- Links from the detail item page in the web store to brochure information in a static web site and vice versa.

These are just a few of the customizations that we have done over the years. Often customizations become standard features in future releases.

WEB STORE SETUP

Although Iciniti eCommSuite.NET is a very simple store to setup there are some issues surrounding all web stores that need to be considered. Adding a web store to your organization will bring about change and may require some expertise that has not been required up until now. This is why working with a good local reseller can be critical to the success of your new web store.

WEB MASTER

Someone to manage the day-to-day needs of the web store; everything from designing new pages to adding new users and changing the catalog. Most often this is a job that is outsourced to your reseller.

DATABASE ADMINISTRATOR

Databases are extremely critical to any organization and the data generated by a web store simply adds to this. Each company needs to ensure someone is responsible for maintaining the organizations databases; backups, clearing logs etcetera. Again this may be a job that your reseller can do for you remotely.

NETWORK SUPPORT

Your new web store will either be hosted internally or externally at an ISP. In either case there are network issues to deal with when setting up and managing the site. Things such as firewall settings, e-mail ports are all common issues for a trained network specialist. If you do not have an internal Information Technology (IT) group this is likely a task that your reseller is already handling for you.

Once you decide who will handle the above tasks there are some specific tasks, which need to be completed.



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DOMAIN NAME REGISTRATION AND HOST NAME ASSIGNMENT

What will the Internet address be for the eCommSuite.NET application i.e. www.mycompany.com. A unique IP address needs to be assigned by the hosting partner to the web server.

ADD/POINT HOSTNAME IN DNS SERVER

The Domain Name Server (DNS) at your ISP will need to be updated with a new IP address and host name (typically 48 hours before going live). Adding your hostname to the DNS is how others on the web will find your site.

WEB SERVER HARDWARE INSTALLATION

Most of these steps will be handled in conjunction with your ISP or accounting system reseller. If the site is going to handle credit card transaction an SSL Certificate is mandatory.

- Microsoft Windows 2000
- Microsoft Internet Information Server (IIS)
- Microsoft .NET Framework
- SSL Certificate

MYSQL SERVER SETUP

- Download and Install MySQL Server
- Install Navicat MySQL Control Center

CREDIT CARD PROCESSING

- Establish Merchant Accounts for all currencies accepted
- Obtain Currency Specific Login Codes from E-xact for all currencies accepted
- Installation E-xact Software and Configure for all currencies accepted

CONFIGURE WEB SERVER DATABASES

Accounting System Tables

- Will be installed by replication.
- Requires replication services implemented.

User Table

- Pre-registered Accounting System customers in WCS_Users table. For example, Customer number or email address = login name, phone number = password.

Catalog Index

- Category.xml will be created based on existing inventory data.

Product Tables

- Category -> Products (WCC_CategoryLinks)
- Product Detail text, Pricing Item (WCC_ItemDescription)



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- Reference Documentation

Product Images

- Load product images

Shipping Rate Tables

- Set up all zone and rate tables for each of the shipping companies you use.

ACCPAC ORDER ENTRY AND CREDIT CARD PROCESSING SYSTEM

Payment Gateway Software Installation and Setup

- Requires login account and password for all currency accounts prior to going live
- Same login and password as used on the web server
- Must be installed on every workstation that will be involved with credit card processing
- Installation takes only a minute.

Iciniti Credit Card Processing and Order Entry Software

- This software must be loaded on the accounting server
- Must be installed on every workstation that will be involved with credit card processing
- Installation takes about an hour.

DATA REPLICATION (ONLY REQUIRED IF WEB STORE IS HOSTED AT ISP)

- Consists of Data Replication Client installed on accounting server
- Performs nightly query and upload to web server, normally scheduled after the nightly backup
- Data replication server installed at the web server receives the upload and updates local copy of accounting system tables.
- Copies only a subset of the accounting system tables needed to support order entry and customer account enquiries.

ADVERTISE THE SITE

- Notify existing customers of their login name and password.
- Search engine optimization

PAYOFF

Although the process of putting up a web store can seem daunting the payoff can be huge. Typically, even the most customized web site is up and running in less than two months, and a truly out of the box store can go live in about 15 days (most of which is required for getting merchant accounts from your bank and SSL certificates).

Iciniti has customers that place thousands of orders per year through their sites. We have clients that have opened up new markets in countries thousands of miles from their place of business. And we have had companies for which the



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automation and timesavings of an integrated web store alone has allowed them to completely pay for the store in less than 24 months.

Iciniti eCommSuite.NET is a highly functional, highly customizable and fully integrated web store that will work for you today and for many years in the future.