

ZiiZii Web Ordering Walkthrough



Version 2.5.0.0 - Updated on June 22nd, 2016

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1 First-time use

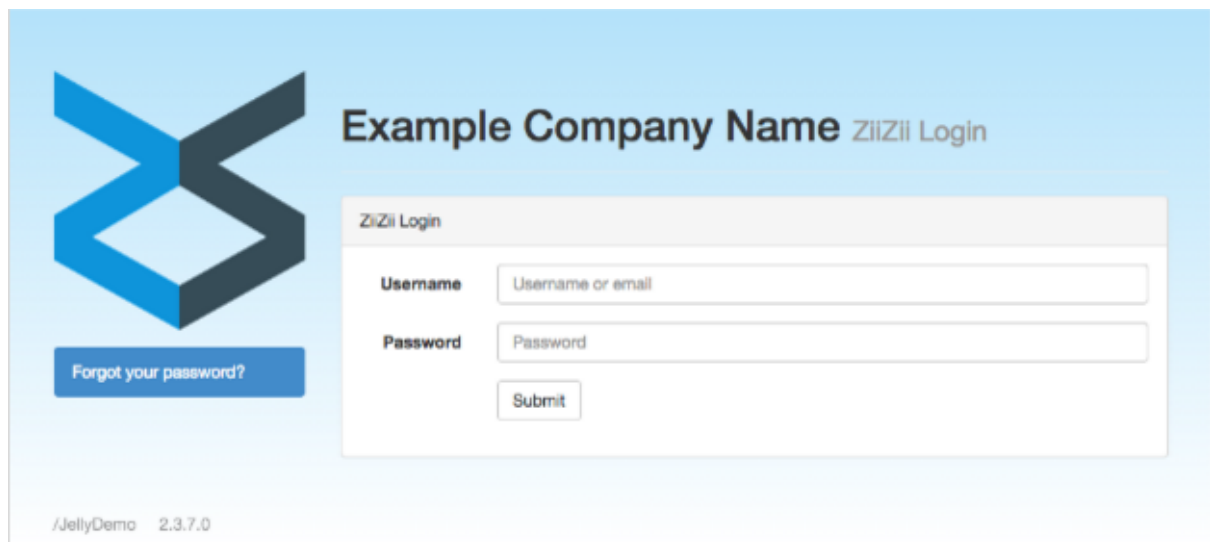
After your user account is created for the first time, you'll receive an email saying "Welcome to ZiiZii. You will need to *Click here* to set your password."

If you're unable to locate this email, be sure to check your Junk/Spam folders. When you visit the link, you'll be asked to enter and confirm a custom password for your account, if you were not given one in your initial email. It must be at least 8 characters long, and be sure not to forget it!

2 Login page

Next, access the login page at

<http://companyname.ziizii.io/zz/login>



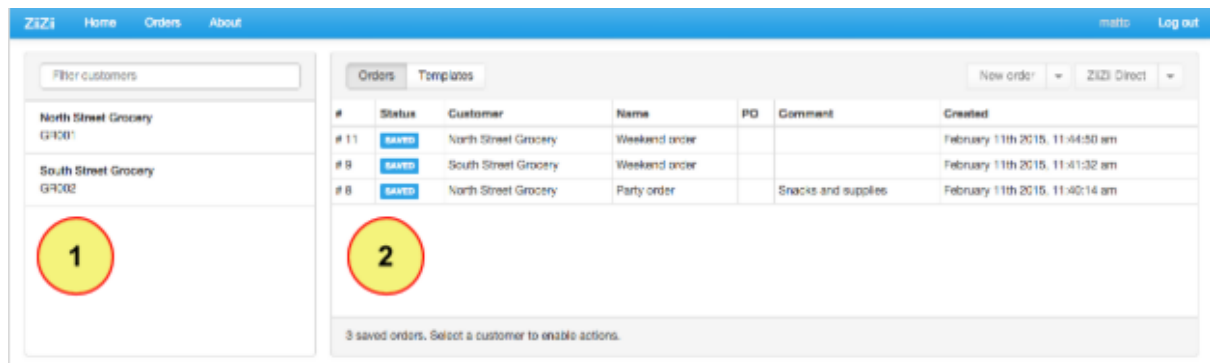
The screenshot shows a login page for 'Example Company Name ZiiZii Login'. On the left is a stylized logo consisting of blue and black geometric shapes. Below the logo is a blue button that says 'Forgot your password?'. To the right is a white login form with a title 'ZiiZii Login'. The form contains two input fields: 'Username' with the placeholder text 'Username or email' and 'Password' with the placeholder text 'Password'. Below these fields is a 'Submit' button. At the bottom left of the page, the text '/JellyDemo 2.3.7.0' is visible.

If you were not provided a url in the activation email, the url is generally your company's name without spaces.

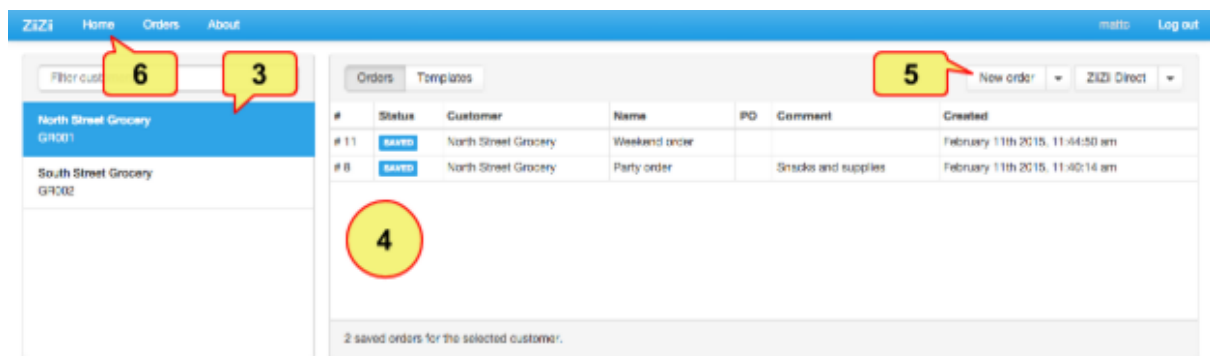
If you have forgotten your password, and if your username is an email address, then click "Forgot your password?" and provide your email address. A password reset link will be sent to your inbox, and have you follow the same procedure as setting up a password for the first time. Please contact Support, at the contact information at the bottom of this manual, if you have forgotten your username or cannot retrieve a password reset link.

3 Dashboard and customer list

The web ordering dashboard (pictured below) is your entry-point to web ordering. This is the first page you see after logging in. There are two main areas.



1. All customers associated with your user account are listed in the left panel. Enter a customer name or number in the “Filter customers” box to quickly search a large list.
2. All customers’ unsent orders appear in the right panel. Unsent orders have the “SAVED” status, and remain in this list until you send or delete them individually.



1. Initially, no customer is selected. Select a customer by clicking a name in the left panel. (Click again on the selected customer if you wish to deselect.)
2. Unsent orders are listed for the selected customer only. (Deselect the selected customer to see the full list of unsent orders.)
3. The “New order” button is enabled only while a customer is selected.
4. Click “Home” at any time to return to this screen.

4 Creating an order

On the dashboard, first select a customer and then click “New order” to create a blank order. You’ll be taken to the order screen (pictured below). There are four main areas.

1. General order details and actions appear in the upper left panel. Name, PO, and comment fields will be visible to the wholesaler when the order is sent.
2. All items added to the order appear in the upper right panel. Here you can adjust quantities, choose selling units, and toggle any available item flags.
3. Click



to remove an item from the order. Item categories appear in the lower left panel. Click any category to load its items.

4. Catalog items and search controls appear in the lower right panel. When the order screen first appears, recently ordered items are loaded automatically in this panel.
5. Click



to add a catalog item to the order.

6. The approximate cost of the order is the sum of the “extended cost” values. Extended cost is calculated as (unit cost × quantity) for each item in the order.
7. All changes are saved automatically. You may leave a saved order at any time, and find it on the dashboard when you wish to resume or send it.
8. Click “Send” when ready to submit the order to the wholesaler. You will be asked to confirm.

5 Searching for items

Find the catalog panel in the lower right of the order screen.

SKU	UPC	Description	Pack	Size	Case Cost	SRP	QOH	Last ordered	Last o
257469		1502 GROUND COFFEE 200 G	1	EACH	\$7.47	\$0.00			
257360		1502 WHOLE BEAN COFFEE 200 G	1	EACH	\$7.47	\$0.00			
761940		8 O'CLK COFFEE 2 OZ (PACKED W/FILTER)	42	CASE/42	\$33.90	\$0.00			
504019		8 O'CLK COFFEE W/FILT 1.75OZ	42	CASE/42	\$29.90	\$0.00			
761916		8 O'CLK WH BEAN COFFEE 2P	10	CASE/10	\$125.95	\$0.00			

1. You can enter a SKU, UPC, or part of an item description into the “Search catalog” box and click “Search” to see matching items.

1. Search results may be partitioned into multiple pages. Click “Page X of Y” to specify a particular page number, and then press Enter to jump to that page.
2. Quick search buttons are available on the right. Click “Last 14 days” to load items recently ordered by the customer.
3. Click “All Deals” to load all items currently on deal.
4. Click “Advanced” to combine multiple filters for more limited results.

5.1 Advanced search

In the advanced search dialog, specify one or more filters and click “Apply Filters” to load results. (Leave the “Matching the description” box blank to disable the description filter.)

6 Speed Entry

Find the Speed Entry widget on the order screen.

Click in the “SKU” box, enter an exact SKU, and press Enter on your keyboard.

Focus will jump to the “Quantity” box.

The Speed Entry widget will turn yellow while searching for a matching item. You can enter a quantity immediately, or wait.

Speed Entry	268102	Quantity
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The Speed Entry widget will turn green if a matching item is found.

Speed Entry	268102	4
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Enter a quantity and press Enter on your keyboard to add the item to the order. Focus will return to the “SKU” box automatically. If the item was already in your order, its previously specified quantity will be replaced by the new value.

The Speed Entry widget will turn red if no matching item is found.

Speed Entry	651546	Quantity
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Press Esc on your keyboard to reset the widget. Focus will return to the “SKU” box automatically.

Speed Entry allows you to work as quickly as you like! You may enter and submit a quantity while the SKU lookup is still underway, and proceed to enter the next SKU. The item will be added to your order as soon as it is retrieved from the server. If the item is not found, you will be notified in the bottom right of the screen. Just keep an eye open for a flash of red:

Speed Entry lookup failed to find SKU: 2681022

7 Reviewing sent orders

ZiiZii Home Orders About mattc Log out						
#	Status	Customer	Name	PO	Comment	Created
# 1025	SAVED	YESTERDAY'S	Smokes			February 11th 2015, 2:45:21 pm
# 996	COMPLETED	STOHRER SHELL STATION				February 9th 2015, 4:41:21 pm
# 995	COMPLETED	SHELL LIQUOR				February 9th 2015, 4:41:19 pm
# 994	COMPLETED	ROMMEL'S LIQUOR				February 9th 2015, 4:41:18 pm
# 993	COMPLETED	LACEY LIQUOR				February 9th 2015, 4:41:18 pm

1. Click the “Orders” link to see a full list of saved and sent orders.
2. This list may be partitioned into multiple pages. Click “Page X of Y” to specify a particular page number, and press Enter to jump to that page.
3. Click any saved order to open for editing.
4. Click any sent order to review. Sent orders have the “COMPLETED” status.

Confirmation number	SKU	UPC	Description	Pack	Size	QTY	UNIT	Case Cost	Extended Cost
996	414136	312546637566	HALLS PLUS STICK CHERRY	15	BOX/15	1	CASE	\$10.73	\$10.73
Status COMPLETED	406082	022000001719	WRIGLEYS .35 SPEARMINT	40	BOX/40	1	CASE	\$8.48	\$8.48
Customer STOHRER SHELL STATION	466771	068437911276	BROOKSIDE DARK CHOC AGAI W...RY	10	BOX/10	1	CASE	\$17.90	\$17.90
Totals	310458	072250079396	CINNABON DANISH 5 OZ 6CT	6	BOX/6	1	CASE	\$4.32	\$4.32
12 lines	318162	072250087230	ICED GRANDE HONEY BUN 5 OZ 6CT	6	BOX/6	1	CASE	\$4.32	\$4.32
12 CASE	317867	072250086244	DANISH BIG CHERRY CHEESE 4OZ 6CT	6	BOX/6	1	CASE	\$4.32	\$4.32
Approximate cost \$352.54	317461	072250088268	DANISH BIG BLUEBERRY CHEESE 4OZ 6CT	6	BOX/6	1	CASE	\$4.32	\$4.32
	707414	070662030035	CUP OF NOOD CHIC 2.25OZ	24	CASE/24	1	CASE	\$11.54	\$11.54
	123216	028200002648	MARLBORO BLEND NO. 27 BOX FSC	1	CTN/10	1	CASE	\$71.66	\$71.66
	123281	028200003614	MARLBORO MENTHOL BOX FSC	1	CTN/10	1	CASE	\$71.66	\$71.66
	123232	028200003843	MARLBORO GOLD BOX FSC	1	CTN/10	1	CASE	\$71.65	\$71.65
	123471	028200004772	MARLBORO SILVER BOX FSC	1	CTN/10	1	CASE	\$71.65	\$71.65

1. When reviewing a sent order, general order details appear in the left panel, including confirmation number, associated customer, and a summary of the selling units involved in the order. The approximate cost is based on current prices, and may not reflect the actual cost of the order at the time of ordering.
2. You can review the entire contents of the order, including the quantities and selling units that were specified at the time of ordering.

8 Template orders

Return to the dashboard to find the “Templates” button.

The screenshot shows the Zizi dashboard with the 'Orders' and 'Templates' tabs. The 'Templates' tab is active, showing a list of templates for the selected customer, 'ALASKA RESTAURANT'. The 'New template' button is highlighted with a red circle and the number '2'. The 'New order' button is also highlighted with a red circle and the number '3'. The 'Templates' button is highlighted with a red circle and the number '1'.

Templates can save you from building the same order repeatedly. Build a template once, and clone it as a new order whenever needed.

1. On the dashboard, click the “Templates” button to see templates for the selected customer. All templates are listed if no customer is selected.
2. Click “New template” to create a blank template specific to the selected customer, or click any template in the list to open for editing. You will be taken to a screen where you can build the template just as if you were building an order. You should specify a descriptive name for the template.
3. On the dashboard, click the “New order” button to the right of a template to clone the template as a new order. All items (along with quantities, selling units, and flags) are copied from the

template to the new order. You will be taken to a screen where you can edit the new order before sending.

4. Updating a template will not update saved orders that were formerly created from the template.

9 Troubleshooting

ZiiZii Web Ordering is designed for the desktop web browser. Mobile browsers (running on handheld devices) are not supported.

1. If a saved order is missing on your dashboard
 2. Make sure that you have the correct customer selected to see their unsent orders, or deselect the selected customer to see all unsent orders. Check your recently sent orders on the Orders page, as the order may have been sent prematurely.
3. If the information on screen is smushed together
 4. There may be insufficient space for the layout. Try making your web browser full-screen or increase the window size, and then reload the page.
5. If the website is otherwise misbehaving
 6. You may be using an outdated web browser. Visit browsehappy.com to find links to the latest versions of all major browsers.
7. If you need to contact technical support

8. Please provide details about your web browser. Visit aboutmybrowser.com and include the link below “Share Your Browser Info” in any emails to technical support.



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Should you require assistance with this, or any other Novex Software Development product, please feel free to contact us via on the methods listed below, and one of our technical support professionals would be more than happy to assist you.



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Any after hours voice mail or
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through our Support Website and a
technician will be paged

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Our Support Professionals are
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Therefore, please use discretion
when using this method.

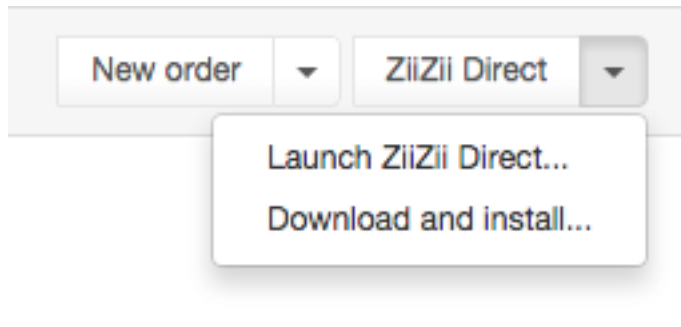
10 Optional Features

The Following List are all of the optional features that a customer can request be activated on their ZiiZii account. This list may be updated as time goes on, and more features become available. Customers should give this list a peruse before their system is set-up so the features are enabled, and can be discussed during the Customer Administrator Walk-throughs.

10.1 ZiiZii Direct

ZiiZii Direct is an integration allowing you to upload Telxon orders through the internet using a Keyspan USB-to-serial adapter. This feature is made available on request.

On the web ordering dashboard, select a customer to enable “ZiiZii Direct” options. Any orders created through ZiiZii Direct will be tied to the selected customer.



If you haven't already installed ZiiZii Direct, open the dropdown menu to access the "Download and install..." option. Installation is required for access to the USB device. You may need to restart your web browser after completing the installation.

Once installed, select a customer on the dashboard and click the "ZiiZii Direct" button to launch the desktop application. It may take a minute to launch. Connect your Telxon and wait for a green light to appear in ZiiZii Direct.

When you see the green light, start an order transmission on the Telxon. Data sent from the Telxon will appear on screen, and a new unsent order will be created for the customer that was selected when you launched ZiiZii Direct.

Return to the web ordering dashboard. The new order should appear in the list of unsent orders.

10.2 Label Printing

Label Printing can be enabled to allow the ZiiZii mobile Apps, on both iOS and Android devices, to print labels right from the App! There will need to be a suitable printer, and the device is linked to it, however. This function can be found on the Ordering Page of the Mobile Applications.

10.3 Minimum Order Quantity

M.O.Q. can be enabled to allow certain items in a customer's catalog to have a minimum quantity required for ordering. This can be used easily if items are only ordered in threes, or fives, or example. This function is handled manually by the ZiiZii team, and can easily be added, removed, or altered as the customer requires it.

10.4 Returns, Inventory, and Order Types

These Custom-Order entries can be enabled to allow the creation of orders that are used for alternative functions, such as returns for returning project, Pre-books, or custom order types as described by a customer. This function is handled by the ZiiZii team, and each Order Type can be added, removed, or altered as the customer requires it. It can be found on the mobile applications by attempting to create a new order, which will display a drop-down menu with multiple selections, based on the amount of Order Types the customer requests.

10.5 Quantity on Hand

Q.o.H. can be enabled to display the count of certain items that the warehouse currently has available on the mobile device. This function can be found alongside items within the mobile applications, and is straight-forwardly delivered.

10.6 Alternate Selling Packs

Alternate Selling Packs can be enabled to allow items to be ordered by different packs, such as by Case, Unit, Sleeve, Carton, and more! This function can be found alongside items found within the Web, and Mobile Applications.