

INTERNET INTERLINK

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TAKE **S** STOCK[®]
DISTRIBUTION SOFTWARE

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Internet InterLink Introduction

The *TakeStock® Internet InterLink* (II) integration provides an easy and efficient method, via the Internet, to offer information and ordering services to your customers. The II integration offers a full-time, real-time connection to your customers in a secured and carefully controlled manner. This access grants the customer the ability to search the entire database of pertinent information and act upon it. As the owner of *TakeStock* software, you control the level of information offered and seen. By providing your customers with Internet access to your company, you can save valuable time and resources while enhancing customer service.

The II integration programs are located in the in the Sales Orders submodule the *TakeStock Sales Orders* module and the Maintenances submodule of the *TakeStock System Management* module.

*Internet
InterLink
Programs*

The *Internet InterLink Print Shopping Cart Orders* and *Update Internet Orders* programs in the Sales Orders submodule allow you review and print shopping cart order lines submitted via the Internet as well as print orders submitted via the Internet and convert them into permanent, open sales orders.

The *Internet User Maintenance* program in the Maintenances submodule of *System Management* allows you to set up control information for the *Internet InterLink* and create and maintain parameters for the information that you want to displays on the Internet.

Internet Interlink Feature Highlights

Internet InterLink offers an extensive list of features, real-time information, and the benefits of around-the-clock customer service. A high-level overview of highlights includes:

- Login is by Internet User, not by customer account.
- Most privileges are maintained at the Internet User level.
- Internet Users can be associated with one, many, or all customers and warehouses; a default customer and warehouse is assigned to each Internet User.
- One customer can be associated with many Internet Users, each with different privileges.
- Internet Users can have a contact record in the *TakeStock* Phone Book, which can be used with Management Alerts.
- A guest may browse the Item Search and Item Detail pages without an Internet User record.
- Item search by Vendor, Product Line, Major Category, Minor Category, Description, Item Interchange (customer part number, vendor part number, etc.), and *TakeStock* Item Number. The distributor can enable/disable the first four search fields listed.
- Items may be added to the Shopping Cart from the Search Results page and/or the Item Detail Page.
- Information on the Item Detail page includes:
 - Item Number and Description
 - Item Image (JPG or BMP format, JPG recommended for size/speed)
 - Total Available (if enabled for the Internet User – options include do not display, display available quantity, or display in-stock / out-of-stock)
 - Available by Warehouse (if enabled for the Internet User, same options)
 - List Price (if enabled for the Internet User)
 - Customer's Price using *TakeStock* pricing logic
 - Link to Item Specifications PDF document.
 - Prompts for Order Quantity, selling Units of Measure valid for this item, Selected Warehouse, and button to Update Cart
- Table of Items for the entered Item Interchange (if multiples exist)
- Table of Substitute Items (if enabled for the Internet User)
- Table of Companion Items (if enabled for the Internet User)
- Internet Item Description or Extended Item Description, both support HTML tags for enhanced formatting (fonts, colors, formatted lists, etc.)

- Item Notes marked for Internet Display (if enabled for the Internet User).
- The Open Order page provides a table with summary information about each order, including the current status. Order Details include item quantities ordered, shipped, and backordered (if confirmation has taken place), merchandise totals, taxes and the order total, and shipping information, including ship via used, tracking numbers (requires Shipping InterLink), and freight code. The Past Order page provides similar information except for order status; the Past Order Detail page provides the same information as the Open Order detail page.
- The Shopping Cart review page provides a list of items in the shopping cart and a consolidated table of companion items associated with items in the shopping cart.
- The Finalize Order page allows the user to enter a request date, purchase order number, requested ship via (using list of ship via codes enabled for use in Internet InterLink), ship to address code (using a list of ship to codes enabled for the active customer), and document notes.
- The Thank You page presents an order recap, which may be printed for future reference from the browser.
- Many *TakeStock* distributors also use Management Alerts to automatically send an e-mail thank you message for Internet orders as well as a shipment notification.
- Each *Internet InterLink* web page provides hyperlinks to the distributor's home page, an e-mail contact for more information, and an e-mail contact for the webmaster. These hyperlink references are automatically generated from control fields maintained by the distributor in *TakeStock*.

Internet Interlink Processing Details

From the Internet, a customer or a potential customer can access an entry path into your company's *Internet InterLink*. The entry path can be structured to give two powerful options. Current customers can enter a specifically pre-defined, customer number and password to perform customer queries and enter sales orders or remain anonymous while performing item inquiries. Potential customers or users who have found the site on the Internet can access the anonymous entry path, but to enter sales orders or access customer specific information, the system requires the secured, log-on entry path. The ability to enter or not to enter via the anonymous entry path is entirely determined by you. If rebate pricing is in place, the shopping cart displays the rebate price.

The *Internet InterLink* is capable of displaying or suppressing the display of available quantities as well as displaying items as either "in stock" or "out of stock."

You can determine which *TakeStock* records are displayed on the Internet. You can select the Internet checkbox prompt on the following maintenance programs to display records in the *Internet InterLink*: *Vendor Maintenance*, *Product Line Maintenance*, *Major Category Maintenance*, and *Ship Via Maintenance*.

Customer Profile Screen

When users log into the Internet InterLink the Customer Profile screen displays their default Customer information, including the customer number and name, salesperson, account terms, credit limit and account balance. The customer profile information displayed for each user id is based on security settings in the *Internet User Maintenance* program.

The Customer information browser is 'updateable' so users can just type in the new Customer number without having to search. The Customer Search feature is available in the upper right hand corner of the screen. If the users choose to search for customer numbers, they can search by Customer Number or Customer Name. This search works like an Item Search where the user can type in part of the name and the program will return all Customers that begin with the user's input. Each Customer number is a "hyperlink" that can be used to select that Customer. When a Customer is selected, the Customer Profile is refreshed to reflect the Customer change. All screens after the Customer profile have the current customer name, number, city, and state or province.

The Quick Order table allows users to enter up to three item quantity pairs and add them directly to the shopping cart. Note that only *TakeStock* item numbers can be processed and the system validates items after the user presses the **Update Cart** button.

The Customer Aging table displays customer current balance and aging balance information as set up in *AR Control Maintenance*.

The Shopping Cart

When a current Internet customer searches and finds items for purchase, the customer can place those items in a shopping cart. In the shopping cart, the customer can select the unit of measure and the desired quantity for the item.

The customer can continue shopping, searching, submit the order, or delete the pending order as well as hold items indefinitely (uncommitted to the TakeStock database). Even when half an order is placed, the customer can exit the Internet and return in days, weeks and so on to find the shopping cart as last left. From this point, orders can be added to, submitted (committing to the TakeStock database) or deleted by line item or the whole shopping cart. You can select an option in Internet User Maintenance to allow the user see all orders for the currently active customer account

Multiple Warehouse View of Inventory Availability

The shopping cart provides a multiple view of inventory availability. Users can select one warehouse or select any warehouse. The default policies for warehouse selection take precedent in the Item Detail Screen, where a browser displays all warehouses where that item is stored and the available quantity in each warehouse. The user can either add the item to the shopping cart or choose to recalculate the price based on the quantity and warehouses chosen per current functionality.

When a customer enters an Internet sales order, the system places the Internet order in a temporary holding table until the orders can be reviewed and converted to TakeStock system sales orders. After the conversion process is complete, the system processes the Internet sales order like all other TakeStock sales orders

Information that is displayed may be general information or specific to the customer. Whether the information is about a customer's orders, inventory, or profile, the search capabilities provide your customers with the ability to easily find the queried information in a secure environment.

Parent Items and Companion Items

The Internet InterLink can process companion items on the Item Detail and Shopping Cart review screens.

Companion items display if (a) companion items are set up in TakeStock for selected items, and (b) the Internet User has been set up to view companion items.

Companion items are displayed with a fixed message: "Customers who bought this item have also bought." This message appears above a table of companion items.

In the Item Detail page, companion items are displayed for the selected item. In the Shopping Cart page, a consolidated list of companion items is generated for all items in the Shopping Cart.

Setup:

System Management→Maintenances→Internet User Maintenance→View Companion Items.

Sales Orders→Maintenances→Setup→Companion Item Maintenance.

Parent items (produced and/or kitted items), are also available for display in Internet InterLink. Parent items are available for display over the Internet provided (a) a Parent BOM record is set up for the parent item, (b) the Parent

BOM record does not contain any selection groups, and (c) the item record has the Internet flag checked to display the item.

Internet InterLink displays parent item availability and pricing for produced items only, provided the Internet User is set up to view availability. If the parent item is a kitted item, then available quantities will be presented as N/A.

Setup:

Inventory Management→Maintenances→Item Maintenance.

Either Manufacturing Control or Sales Orders→Maintenances→Parent BOM Maintenance.

Rebate Pricing

When your customers enter a Shopping Cart order in Internet Interlink, your system can display rebate pricing from the TakeStock system. When the Internet order is converted to a sales order (via the Update Internet Orders programs in the Sales Orders), you can set your system to use the rebate price on the order. For more information on Rebates, refer to the Rebates section of the Sales Orders online Help.

Item Search Page

An Item Search screen provides additional search fields, including Vendor, Product Line, Major Category, and Minor Category. When the Item Search screen produces a list of items, you can enter a quantity next to each item and add these items to your Internet shopping cart. This allows you to bypass the Item Detail screen. If you want to see more information about the item, press the item number hyperlink to go to the Item Detail Screen. Both the Item Search and Item Details screens have item interchange capabilities.

Item search results are sorted by item number. You can click on the column headings for Item Number and Description sort the search results by that column.

Item Detail Page

The Item Detail page displays the Internet Description field from Item Maintenance. The Internet Description field allows you to insert HTML tags for bold text, bulleted lists, paragraph breaks, and so forth.

On the Item Detail screen you can select the Item Specifications button to display a PDF document. The PDF document for a particular item is identified in Item Maintenance, Images view. This PDF file should be located on the web server in the same folder as Internet item image files.

Bulk Order Page

The Bulk Order web page includes a table for entering up to twenty-four item/quantity pairs. Note that only *TakeStock* item numbers can be processed.

If the **Use Personal Lists** checkbox is checked in *Internet User Maintenance*, then you can access the Personal Lists line of controls in the lower portion of the screen. You can create a new personal list, enter a name in the new list name field, and save it by pressing the **Save List** button. Personal lists are saved by

Internet User, by company. Since personal lists are not saved in conjunction with any particular customer, the same personal list can be used for any customer. You can also select a previously saved personal list from the Select List drop down prompt. When you select a personal list, the page refreshes and the item quantity pairs are displayed in the Bulk Order page. To remove a personal list from the TakeStock database, display it and press the **Delete List** button.

The system validates items after the user presses the Update Cart or **Save List** buttons.

II Basic Process Flow

The primary purpose of the *Internet InterLink (II)* integration is to provide an effective means for your customers to access *TakeStock* information and ordering services via the Internet and the World Wide Web with a minimum of human intervention. To accomplish this goal, follow these simple steps.

1. Set up the SM *Internet InterLink User Maintenance* and *Inventory Control* maintenance parameters to setup control information for the *Internet InterLink* and create and maintain parameters for the information that you want Internet users to see.
2. Review and print the shopping cart order lines submitted via the Internet.
3. Print orders submitted via the Internet, convert them into permanent, open sales orders, and remove the submitted Internet orders.

Reference Information

Each form in the *Internet InterLink (II)* integration is listed below.

Use this form:

Print Shopping Cart Orders

Update Internet Orders

Internet User Maintenance

IM Control Maintenance—Internet view

To do this:

Print shopping cart order lines submitted via the Internet.

Print orders submitted via the Internet and convert them into permanent, open sales orders.

Create and maintain Internet user information used for the *TakeStock Internet InterLink*.

Create and maintain Internet user search parameters for the *TakeStock Internet InterLink*.

Policies and Setup

Before you can use the *Internet InterLink (II)* integration, you must complete the policy setup in other *TakeStock* modules.

For additional policies and setup information, refer to the *Policies and Setup* section of the appropriate modules user's guide and see your system administrator.

SM → *Maintenances* → *Internet User Maintenance*

- Set up control information for the *Internet InterLink* and create and maintain parameters for the information that you want Internet users to see.

SM → *Maintenances* → *Setup* → *System Control* → *Authorization dialog box*

- Establish authorization to use the *Internet InterLink* on your system.

Inventory Management → *Maintenances* → *Item Maintenance* → *General view*

- Indicate whether an item is available for Internet searches.

Inventory Management → *Setup* → *Maintenances* → *IM Control Maintenance* → *Internet view*

- Indicate whether Internet users are allowed to perform item searches.
- Indicate which warehouse serves as the default for Internet searches.

Chapter 2	Internet InterLink Programs
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Internet InterLink Programs

The II integration menu provides an effective means for your customers to access *TakeStock* information and ordering services via the Internet and the World Wide Web.

Entries for the *Internet InterLink* menu are:

Print Shopping Cart Orders

Update Internet Orders

Internet User Maintenance

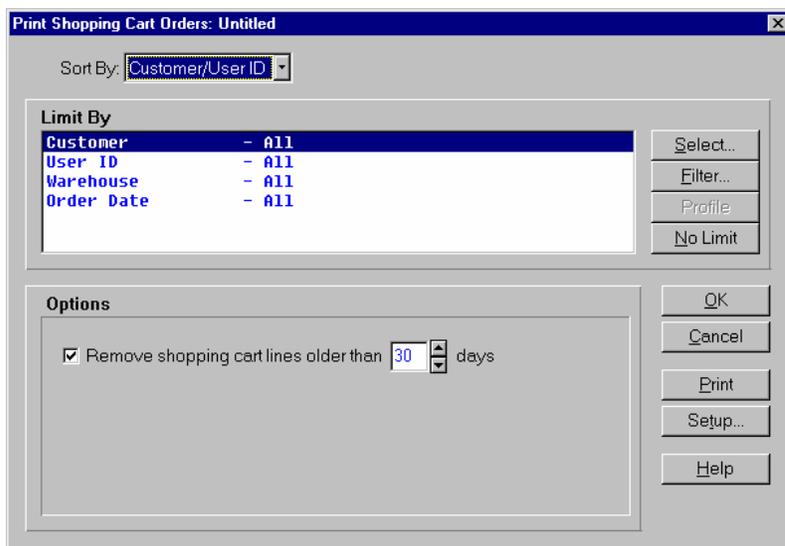
IM Control Maintenance—Internet view

Print Shopping Cart Orders

Using this program, you can print shopping cart order lines submitted via the Internet. You can also remove shopping cart lines older than a cutoff date.

When you access this program, the system displays the *Template-Saved Settings* dialog box, which is used by most reports and registers in the system. From this dialog box, you can select any of the available templates to run the report. For more information on the *Template-Saved Settings* dialog box, see the *TakeStock Basics* manual or the *Template-Saved Settings* topic in the online Help.

If you select the **Edit** button to modify a template or the **New** or **Copy** button to enter new settings, the system displays the *Print Shopping Cart Orders: Untitled* dialog box.



Form Contents

Fields, Buttons, Checkboxes, & Icons

- Sort By** Defines the sort order in which the information prints. The available **Sort By** options are: **Customer/User ID**, **User ID**, and **Order Date**.
- Limit By** Limits the information that the system prints by selecting specific identifying characteristics or a range of identifying characteristics. Available choices are: **Customer**, **Account**, **User ID**, **Warehouse**, and **Order Date**.
- Options** Determines what information to print on the report and optionally update. Select the **Remove shopping cart lines older than # days** checkbox and use the Up and down icons to select the number of days.
- Select** Displays the *Selection* dialog box, which is used to set a range for the highlighted **Limit By** option.
- Filter** Displays the Filter Manager dialog box, which is used to

select filter parameters for the highlighted **Limit By** option.

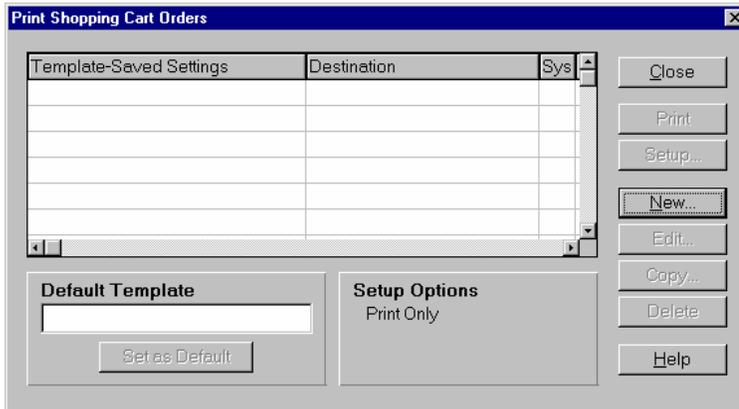
Profile	Accesses the settings from your user profile for the highlighted Limit By option.
No Limit	Resets Limit By options to ALL for the selected option.
OK	Saves the new or modified template and exits the screen.
Cancel	Exits the screen without saving any changes.
Print	Prints the register or report.
Setup	Accesses the Print Setup dialog box, which is used to select settings for printing and updating.
Help	Accesses online Help for this screen.

See Also

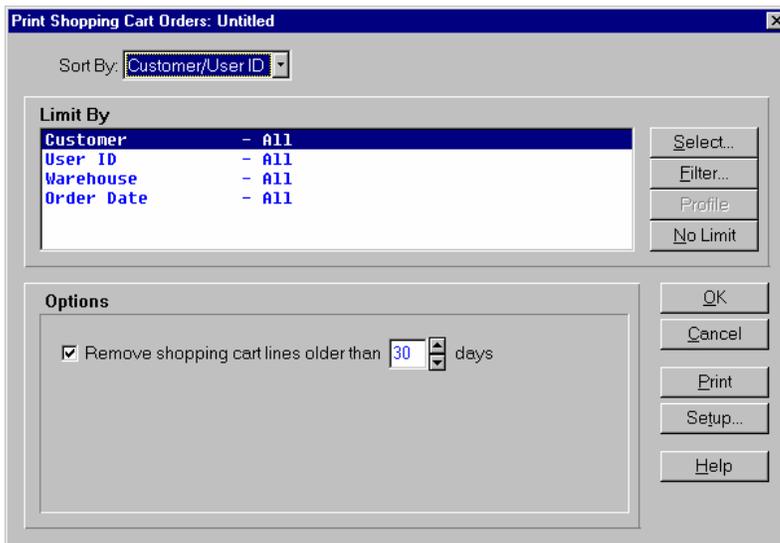
How to print shopping cart orders

How to print shopping cart orders

1. Access the *Print Shopping Cart Orders* screen in the *Sales Orders* submodule of SO. The complete path is *Sales Orders* → *Sales Orders* → *Print Shopping Cart Orders*. The system displays the Template-Saved Settings dialog box of the *Print Shopping Cart Orders* program.



2. Select the **New**, **Edit**, or **Copy** button to access the *Print Shopping Cart Orders: Untitled* template edit dialog box.



3. Select the Sort By and the Limit By settings for new or modified templates.
4. Select the **Remove shopping cart lines older than # days** checkbox and use the Up and down icons to select the number of days. For checkbox and button definitions, refer to the Form Contents section of the *Print Shopping Cart Orders* program.

5. You have now completed the information for the *Print Shopping Cart Orders*. You can select:

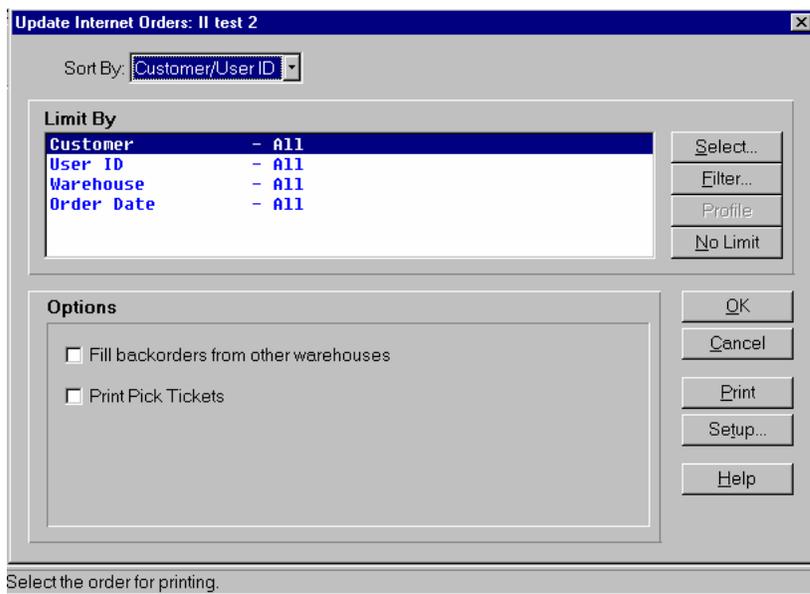
- **OK** to save the current settings as a template.
- **Setup** if you need to access the *Print Setup* dialog box, which is used to modify print and/or update settings.
- **Print** to print the report without saving your current selections.
- **Cancel** to exit without saving your current selections or printing the report.
- **Help** to access the online Help for this screen.

Update Internet Orders

Using this program, you can print orders submitted via the Internet and convert them into permanent, open sales orders. The *Update Internet Orders* program then removes the submitted Internet orders. The system stores the document number from the submitted Internet order record on the actual sales order record. From this program, you also have the option to request the system to automatically search other warehouses if the submitted shipping warehouse has insufficient quantity to fulfill the order. (During this process, the system checks shipping authorizations from other warehouses.)

When you access this program, the system displays the *Template-Saved Settings* dialog box, which is used by most reports and registers in the system. From this dialog box, you can select any of the available templates to run the report. For more information on the *Template-Saved Settings* dialog box, see the *TakeStock Basics* manual or the *Template-Saved Settings* topic in the online Help.

If you select the **Edit** button to modify a template or the **New** or **Copy** button to enter new settings, the system displays the *Update Internet Orders: Untitled* dialog box.



Processing Information

Rebate Processing

When you convert Internet orders to sales orders, the system checks for rebate information. If a rebate is found to be applicable to a line, the program automatically stores the rebate cost and the rebate number on that line. If a price was entered in the Rebate Maintenance, this price is pulled on to the Internet shopping cart and then into the sales order as the customer price for that item. If more than one rebate is found, the system automatically assigns a rebate to the line. Rebate pricing is first in the pricing hierarchy regardless of pricing hierarchy settings. Each line item on a sales order could have up to 3 different costs; the inventory cost, the SA cost, and the rebate cost.

Print/Reprint of Pick Tickets

You can also print pick tickets from this program. When you select the Print Pick Tickets checkbox, the system displays a dialog box allowing you to highlight the reprint and/or the print Pick Ticket template you want to use. Whether the selected template(s) are intended for Print or Reprint will be based on the initiating program. The pick tickets will print to whatever printer is set up on the particular templates, respectively. The processing of the pick ticket template(s) will occur exactly as if you selected the particular template(s) from the Print Pick Ticket menu item, with the added exclusion that only those SO documents processed by the initiating program will be processed by the pick ticket template(s). Note that this could result in no picks printing if the template is selected incorrectly. For example, if you select a pick ticket template for SO Document Release (which is intended for Print), and that particular template's setting for "Print/Reprint" is "Reprint", then no pick tickets will print. In the case of the DSR, only "backordered" SO documents (i.e. those SO documents that still retain a committed OR backordered quantity after the DSR finishes processing) will print pick tickets.

Backorder Processing

When the *Update Internet Orders* program fills backordered quantities on sales orders, it does **not** use the **Backorder Fill Priority** option in the *IM Control Maint* program. The processing is as follows: if a line has a backordered amount and the user checked the option for **Fill backorders from other warehouses**, the *Update Internet Orders* program searches *alphabetically* by warehouse code through all warehouses for that item and fills backorders as it can. If your company is concerned about backorder fill priority, do NOT check the **Fill backorders from other warehouses** option in the *IM Control Maint* program; instead run *Update Internet Orders* first, then run the *Auto Commit Backorders* program.

BOM (Kitted) Items Processing

Update Internet Orders also processes kitted items. The program checks items marked as parent items and determines how to process them based on whether parent items are designated as kits or optional.

Shipping Warehouse Processing for BOM Items: The Update Internet Orders program checks for a shipping warehouse goes through the following hierarchy: Ship To shipping warehouse, Customer shipping warehouse, then the Initiating warehouse, to determine the shipping warehouse. For both kitted and optional items if the parent item exists in a warehouse within the hierarchy that warehouse becomes the shipping warehouse. Otherwise, the program determines the shipping warehouse by finding the warehouse that can either fill or come closest to filling the order. If a parent item is marked as optional the program checks if there is any quantity available in the shipping warehouse. If there is an available quantity the item is processed as a finished item, not a kit. For kit or optional items that do not have available inventory the program checks the components, using the warehouse hierarchy to determine the shipping warehouse.

After Determining a shipping warehouse the system calls the Sales Order Import Gateway processing program to check if a line item is marked as a BOM item. If the line item is a BOM item, the program then runs the system Kitting processing routine to determine the committed and backordered quantities. The quantities are determined from the components defined in Parent BOM Maintenance, just as

if the order was entered from within SO Entry and the Update SO setting on the Kitting view of MC Parent BOM Maintenance is set to automatic.

Form Contents

Fields, Buttons, Checkboxes, & Icons

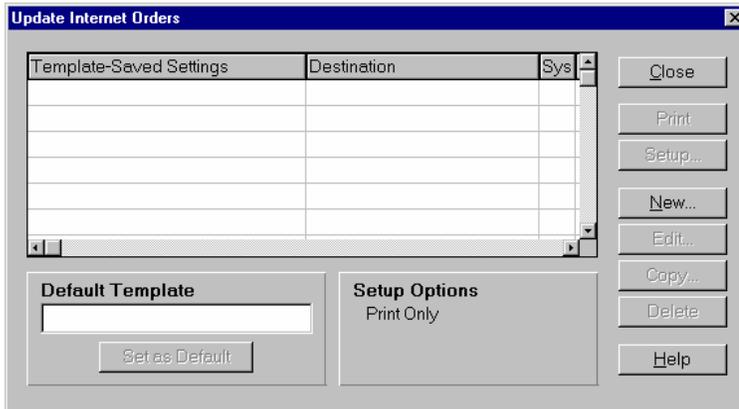
Sort By	Defines the sort order in which the information prints. The available Sort By options are: Customer/User ID , User ID , and Order Date .
Limit By	Limits the information that the system prints by selecting specific identifying characteristics or a range of identifying characteristics. Available choices are: Customer , Account , User ID , Warehouse , and Order Date .
Options	Determines what information to print on the report and optionally update. Select the Fill backorders from other warehouses checkbox to indicate to the system that you want to automatically search other warehouses if the submitted shipping warehouse has insufficient quantity to fulfill the order. Select the Print Pick Tickets checkbox to indicate to the system that you want to print pick tickets for created orders. If you select this checkbox the system automatically displays the <i>Template Selection</i> dialog box so you can select a template for printing the pick tickets.
Select	Displays the <i>Selection</i> dialog box, which is used to set a range for the highlighted Limit By option.
Filter	Displays the Filter Manager dialog box, which is used select filter parameters for the highlighted Limit By option.
Profile	Accesses the settings from your user profile for the highlighted Limit By option.
No Limit	Resets Limit By options to ALL for the selected option.
OK	Saves the new or modified template and exits the screen.
Cancel	Exits the screen without saving any changes.
Print	Prints the register or report.
Setup	Accesses the Print Setup dialog box, which is used to select settings for printing and updating.
Help	Accesses online Help for this screen.

See Also

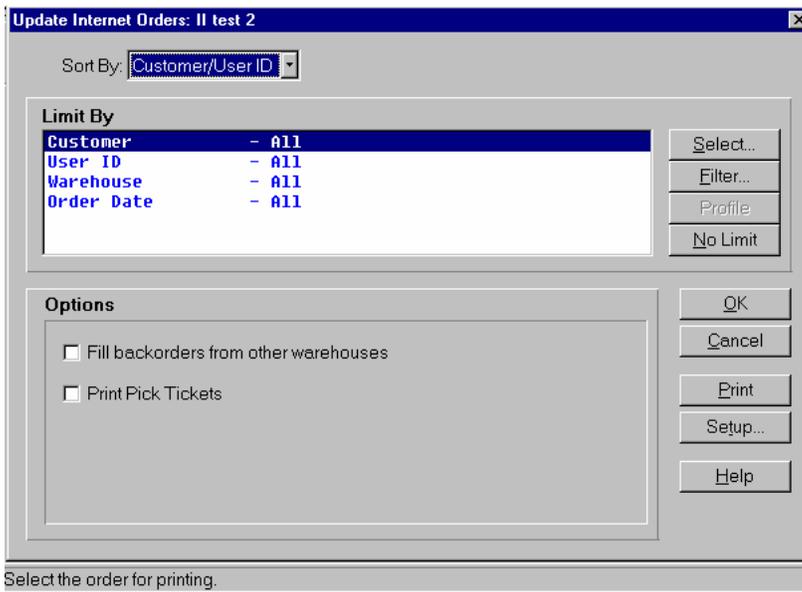
How to update Internet orders

How to update Internet orders

1. Access the *Update Internet Orders* screen in the *Sales Orders* submodule of SO module. The complete path is *Sales Orders* → *Sales Orders* → *Update Internet Orders*. The system displays the Template-Saved Settings dialog box of the *Update Internet Orders* program.



2. Select the **New**, **Edit**, or **Copy** button to access the *Update Internet Orders: Untitled* template edit dialog box.



3. Select the Sort By and the Limit By settings for new or modified templates.
4. Select the **Fill backorders from other warehouses** checkbox to indicate to the system that you want to automatically search other warehouses if the submitted shipping warehouse has insufficient quantity to fulfill the order. For checkbox and button definitions, refer to the Form Contents section of the *Update Internet Orders* program.

Select the **Print Pick Tickets** checkbox to indicate to the system that you want to print pick tickets for created orders. If you select this checkbox the system

automatically displays the *Template Selection* dialog box so you can select a template for printing the pick tickets.

5. You have now completed the information for the *Update Internet Orders*. You can select:
 - **OK** to save the current setting as a template.
 - **Setup** if you need to access the *Print Setup* dialog box, which is used to modify print and/or update settings.
 - **Print** to print the report without saving your current selection.
 - **Cancel** to exit without saving your current selections or printing the report.
 - **Help** to access the online Help for this screen.

Internet/PDA User Maintenance

Refer to the *Internet/PDA User Maintenance* information in the *Maintenances* chapter of the *System Management Users Guide*.

IM Control Maintenance—Internet View

Refer to the *IM Control Maintenance—Internet View* information in the *Maintenances* chapter of the *Inventory Control Users Guide*.

Chapter 3	II Terminology
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II Terminology

The list below provides summary information on terms used in the *TakeStock Internet InterLink* integration.

Shopping Cart

A staging area, for customers with online ordering access, where products are held for a specified period of time until the customer submits or deletes the order.

Shopping Cart Lines

Those order lines entered by a user via the Internet that have not been submitted on a final order. These lines remain in the Internet user's shopping cart unless deleted, submitted on an order, or removed by the *TakeStock* user.

Submitted Order

An order that has been completed by an Internet user by clicking a Submit button on a final order page. Orders that have been submitted cannot be changed or deleted by an Internet user. Submitted orders are printed and/or updated via the Update Internet Orders program.

Temporary Documents

Actual database records created when a user enters a shopping cart line or submits an order. When a shopping cart line is entered, the system creates a record in the soTempDocLn table. When an order is submitted, the system creates a record in soTempDocHdr table. These tables are referred to as temporary because the system deletes them when the *TakeStock* user runs the *Update Internet Orders* program.

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