LOGISTICA SOLUTIONS

enterpriStore

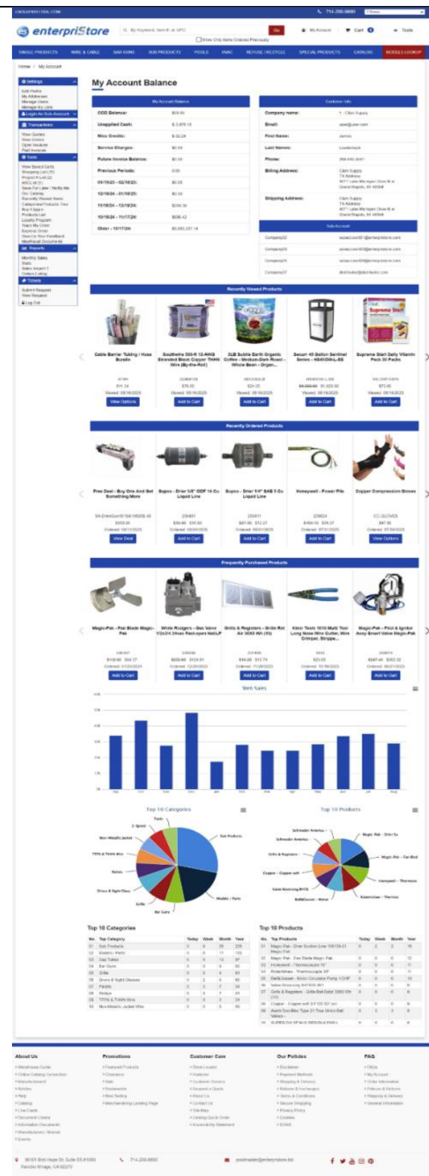
My Accounts - Customer Portal - Account and Service Features

Enterpristore offers a robust Customer Portal designed to empower businesses with seamless account management and advanced support tools, fostering customer loyalty and engagement. Its core capabilities include real-time financial dashboards, hierarchical user access controls, integrated quote and invoice tracking, personalized ecommerce tools, and AI-driven product recommendations.

The platform centralizes operations by combining financial management, user administration, order processing, and analytics into a single, user-friendly interface. Key features such as detailed account balance summaries, customizable reporting tools, and intuitive shopping functionalities ensure businesses can efficiently manage their operations while enhancing the overall shopping experience.

Core Platform Capabilities:

- **Comprehensive Account Management** – Real-time financial dashboards with detailed balance tracking, historical analysis, and visual sales analytics
- **Sophisticated User Management** – Hierarchical access controls for Master Users, Regional Managers, and Local Branch Managers with granular privileges for ordering, invoicing, and inventory management
- **Seamless Quote & Invoice Tracking** – Integrated payment processing (ACH/Credit Card), real-time order tracking, and automated document management synchronized with ERP systems
- **Advanced Ecommerce Tools** – Personalized shopping lists, loyalty programs, catalog quick ordering, customer feedback systems, and comprehensive support integration through Zendesk and Max Recall
- **Robust Analytics Dashboard** – Detailed performance metrics including monthly sales analysis, customer statistics, order history, and configurable reporting across multiple timeframes
- **Intelligent Shopping Features** – Recently viewed products, buy-it-again functionality, saved carts, and AI-driven product recommendations
- **Integrated Business Solution** – Streamlines operations by combining financial management, user administration, order processing, and business intelligence into a single, user-friendly portal



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Main Page View

This is the central hub where users can get a quick overview of their account status and activity at a glance.

Account Balance Summary: A detailed breakdown of the user's financial status.

- COD Balance
- Unapplied Cash
- Misc Credits
- Service Charges
- Future Invoice Balance
- Aging Balances (e.g., 0-30 days, 31-60 days, etc.)

Customer Information: Displays key account details.

- Company Name
- Contact Information (Email, First Name, Last Name, Phone)
- Default Billing Address
- Default Shipping Address

Quick Lookups: Fast access to recent and relevant product information.

- Recently Viewed Products
- Recently Ordered Products
- Frequently Bought Products

Snapshot Graphs: Visual summaries of purchasing behavior.

- Monthly Sales Overview
- Top 10 Purchased Categories
- Top 10 Purchased Products

User Management

Tools for master account holders to manage sub-accounts, users, and their specific permissions on the platform.

User Hierarchy:

- User Tiers: Create different levels of access (e.g., Master User, Regional Manager, Local Branch Manager).
- Sub-Accounts: Manage accounts for different branches or departments.

User Administration:

- Add, delete, and edit user profiles.
- Manage and assign user privileges.

Contact Information Management:

- Update key user details like Email, Password, Position, Phone Number, and more.

Address Management:

- Control access to Billing, Shipping, and Mailing addresses, making them available, editable, or restricted as needed.

User Privileges: Granular control over what each user can do.

- Place Orders and Quotes
- View and Print Invoices
- View Order Status & History
- Access Saved Carts
- Manage Personal & Shared Lists
- View Company-Specific Pricing

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- Check Inventory Levels
- Set Daily Spending Limits

View Quotes and Invoices

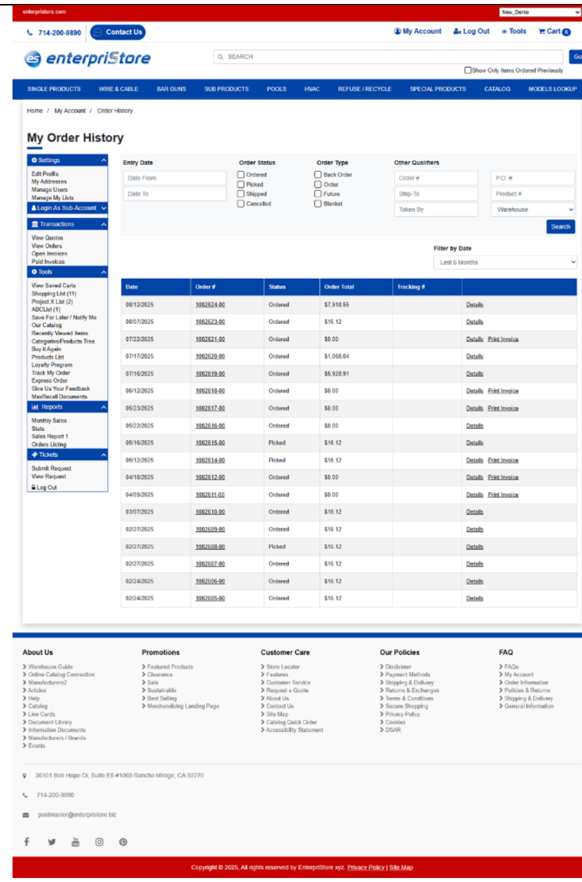
A dedicated section for accessing, tracking, and managing all financial documents and order history.

Order & Quote Status:

- **Open Quotes**: View and manage all outstanding quotes.
- **Open Invoices:** See all current, unpaid invoices.
- **Paid Invoices:** Access a complete history of paid invoices.
- **Order Activity Tracking:** Check the real-time status of any order and track shipments.

Invoice Details & Actions:

- **Line Item View:** Drill down into each invoice to see details for every line item (Item #, Quantity, Price, etc.).
- **Online Payments:** Select and pay invoices directly via ACH or Credit Card.
- **Quick Reorder:** Easily reorder items from a past invoice.
- **Document Retrieval:** Save invoices as PDFs, print directly, or retrieve original invoice PDFs from the ERP system.



Ecommerce Tools

A collection of powerful features designed to streamline the purchasing process and enhance the user's shopping experience.

Shopping & Ordering:

- **Catalog Quick Order:** Quickly add items to the cart by entering SKUs.
- **Buy It Again:** Instantly access a list of previously purchased products for easy reordering.
- **Saved Carts:** Save a shopping cart to complete the purchase at a later time.
- **Recent History:** Shows the browsing history of products viewed
- **Category / Product Listing:** Browse the full catalog of categories and products.

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List Management:

- **Shopping Lists:** Create, manage, and share multiple product lists for different projects or needs.
- **Wish Lists / Save For Later:** Save products for future consideration. Users can be notified during checkout about these items.

Customer Engagement & Support:

- **Request a Quote:** Formally request custom pricing for specific or large orders.
- **Feedback & Surveys:** Submit feedback or participate in customer surveys.
- **Support Tickets:** Submit and view support requests through a Zendesk integration.

Integrations & Resources:

- **Max Recall:** A third-party integration for advanced document retrieval.
- **Our Catalog:** A direct link to the Warehouse Guide for advanced product searching.

User Dashboard

Provides in-depth analytics and reporting tools for a comprehensive look at account activity and sales data.

Sales Performance Graphs & Tables:

- **Monthly Sales Summary:** A detailed table showing monthly statistics like total orders, average daily orders, net sales, shipping, gross sales, and average order value.

Customer Statistics:

- View key metrics for the current month or year.
- Filter statistics based on order status.
- **Metrics include:** Total number of orders, total sales (incl. tax), total shipping, total taxes, and average basket size.

Reporting Tools:

- **Sales Summary Report:** Generate reports by year, month, or week, showing orders, items, revenue, and shipping costs.
- **Individual Order Lookup:** Search for and view the complete details of any single ecommerce transaction.