



EDGE v6i

ECOMMERCE PLATFORM -
CAPABILITIES, FEATURES AND FUNCTIONALITY



ALL-IN-ONE OMNICHANNEL-READY ECP AND OMS SOLUTION

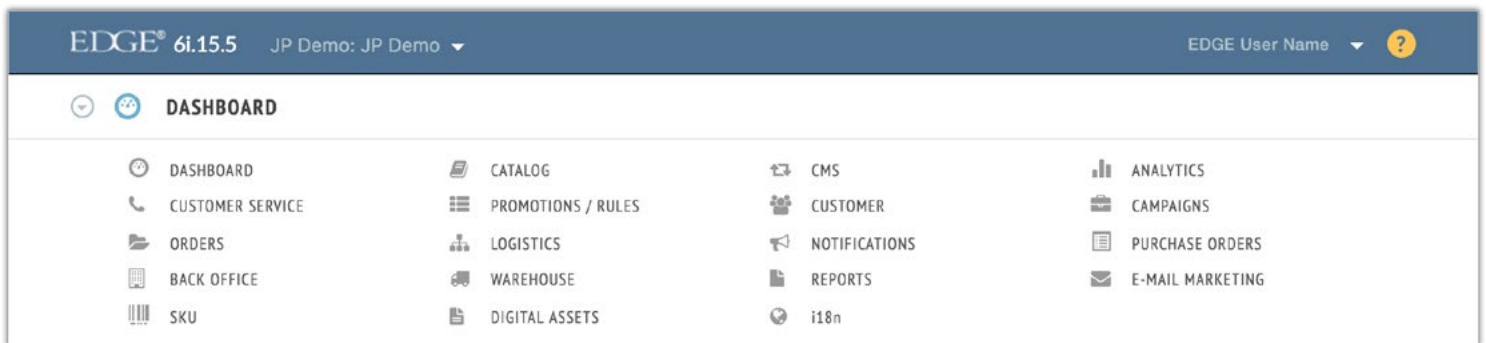
EDGE is a turnkey eCommerce platform and Order Management System (OMS) designed to do all the heavy-lifting involved in today's complex and demanding omnichannel environment. It provides visibility across business units, distribution channels and trading partners, and seamlessly integrates all of the IT touch points between what the customer orders, where it's sourced, and how it's picked, packed and shipped.



On the front end, EDGE enables you to deploy and maintain world-class eCommerce sites. The EDGE OMS aggregates all types of orders from any order source and consolidates them in a common environment for management in real time across one or multiple fulfillment locations.

EDGE MODULES

Administering EDGE is easy because functionality is housed in modules that users can access to intuitively manage the multi-faceted operational processes involved in eCommerce. This includes defining rules to handle extremely complex business logic, such as sourcing orders to the most appropriate warehouse based on inventory availability and customer proximity.



Comprehensive EDGE platform capabilities, features and functionality are highlighted and categorized on the following pages and span the administration and management of your entire eCommerce ecosystem.



TABLE OF CONTENTS

EDGE Capabilities, Features, Functionality

Page	Content
4	System and Site Administration
4	Site and Content Management
5	Mobile Ready
6	Storepoint
6	Digital Asset Management
6	Rich Product Imaging
7	Catalog and Product Merchandising
8	Site Navigation and Guided Search
9	Pricing and Promotion
10	Search Engine Optimization and Social Media Integration
10	Gift Cards, Registry and Messaging
10	Shopping Cart and Check Out
12	Marketing Campaigns, Affiliate Rewards Programs and Surveying
13	Payment, Taxation and Fraud Prevention
14	Globalization and Internationalization
15	Order Capture
15	Vendor Drop Ship Portal
16	Order Management
17	Order Sourcing
17	Order Handling and Shipping
18	SKU Management
19	Warehousing and Logistics
19	CRM and Customer Communications
20	Customer Service
21	Purchase Order Management
21	Real-Time Reporting
24	Channel Analytics
25	Backend Systems and Supplier Integration
26	Security and Compliance

NOTE: Blue text indicates Established 3rd Party Integration

EDGE CAPABILITIES, FEATURES, FUNCTIONALITY

SYSTEM AND SITE ADMINISTRATION

Configure your EDGE environment by activating modules, integration protocols, eBanking, and system user access policies and permissions to support your online businesses.

- **Module Set Up** – Activate desired functionality in each module for each website.
 - **System Users** – Set up system users and manage their permissions for each module view and functionality down to the data field level.
 - **Dynamic Fields** – Customize and extend standard data attributes by adding unlimited dynamic fields without custom code or IT intervention.
 - **Integration Protocols** – Configure and manage system integration destinations, destination systems, pipe methods, message types (XML, EDI, flat files, etc.) and other integration set-up activities.
 - **Messaging Reports** – Monitor and resolve data messaging errors (e.g., XML data feeds) by viewing and generating integration messaging reports by status, message type and date range.
 - **eBanking** – Activate credit card authorizers and payment gateways, such as Authorize.net, PaymentTech, PayPal, Litle, Trust Commerce and CyberSource.
-

SITE AND CONTENT MANAGEMENT

Create and manage world-class, multi-channel B2C and B2B websites, mobile sites and micro sites with EDGE's easy-to-use CMS module. It is an advanced content management and page-editing toolbox enabling non-technical users to build, edit and update web page content, banners and graphics without template constraints.

- **Site Development** – Build and manage multiple, feature-rich B2C, B2B, mobile eCommerce websites, micro sites and mobile sites from an intuitive, easy-to-use application interface.
- **Site Administration** – Create unlimited users and manage their permissions for content management either at the individual or group level.
- **Site Design** – Use built-in CSS editor to control the look and feel of the website, including the styling of page elements and management of background, text, fonts, borders, padding, argins and other site design elements.
- **Page Functionality** – Add, delete or modify web page functionality (e.g., product search, mini-cart, account login, “Contact Us” forms, etc.) quickly and easily using drag-and-drop editing tools.
- **Page Layout** – Build custom page layouts and an unlimited number of content pages without the constraints of prescribed templates.
- **A/B Testing** – Variants of layouts, pages, blocks and views can be created and used for A/B Testing.
- **Staging** – Use Import/Export functionality to work on different templates without impacting live production site.
- **Page Updates** – Use WYSIWYG rich text editor and drag-and-drop design tools to build, edit and update web pages.
- **Versioning** – A version tab enables users to see all available versions for each content section and to load or delete previous content versions as needed.
- **Dynamic Media** – Create and publish banners; customer testimonials; picture galleries; calendar of events; image, video, audio and document files; external links (e.g., third-party blogs, community forums); FAQs; RSS feeds; etc. (refer to Rich Product Imaging section for more details).
- **Page Elements** – Control and customize site features, functions and display settings for non-content elements, such as button text, column headers, form labels, product images, searchable product attributes, site Favicon, etc.
- **Content Sharing** – Implement “Add This” to allow site visitors to share content with more than 300 social networking services; this feature generates a broad range of analytical reports detailing how visitors are sharing your content.



- **Social Site Logins and Links** – Enable existing and new customers to use their Facebook or Google+ logins to register on site. Customer data from the social network will be captured to pre-populate the on-site registration form. Automate cross links with social networking sites, such as Facebook, Google+ Twitter, LinkedIn, YouTube, etc.
- **Lists and Registries** – Enable customers to create, manage and share “Wish Lists,” “Favorites,” “Tell-a-Friend” and gift registries.
- **Store Locator** – Add store locator that can display store profile and maps, providing customers with a list of nearby store locations in order of proximity.
- **Third-Party Apps** – Manage implementation of third-party applications to support enhanced front-end website capabilities such as Customer Reviews, Live Chat, Sales Tax Calculations, Guided Search, Product Recommendations and more.
- **Sign Ups** – Include newsletter sign up and product update forms on content and catalog pages.
- **Menus** – Flexibly create and position custom, multi-level menus for intuitive site navigation or control animation of pre-built menus (e.g., accordion, drop-down, fly-out views and mega menus) (refer to Site Navigation and Guided Search section for more details).
- **XML Site Map** – Generate a dynamic XML site map. Pages, Categories and Catalog items can be flagged to be included to aid in SEO. Employs a standard sitemap.xml extension.
- **Site Links and Search** – Dynamically create and administer site navigation links, search sort order and display status; and establish parameters for filtered guided search, such as price range, product type, brand, product attributes and more (refer to Site Navigation and Guided Search section for more details).
- **Page URLs** – Automatically generate Search Engine Safe (SES) URLs.
- **Language** – Display page content in any language supported by major Internet browsers.
- **Publishing** – Publish page content and graphics in real time without code moves, or preview changes in a staging environment to test prior to pushing changes to the live production environment.
- **Analytics** – Real-time, cross-channel customer and order data is displayed through dashboards that can be personalized for job function relevancy by the authorized user with drag-and-drop widgets. A Google Analytics widget is available to ensure all historical site data can be viewed and compared with current activities in a single location.
- **Traffic Access** – Control website access by visitor IP address (e.g., country inclusion/exclusion).
- **Customer Registration** – Manage and control customer registration rules, including default opt-in settings, email as user name, force validation of billing and shipping address, email format, phone number, etc.
- **User Login** – Set up customer login requirements as well as options for guest check out.
- **Password** – Control “Forgot Password” form input requirements and manage content for email notification, including subject line text.
- **Order Detail Access** – Provide customer and/or guest with self-service access to order detail, order disposition, order tracking, order history, return order processing (RMA issuance) and administration of auto-ship and continuity orders.
- **Opt-In Q&A** – Add opt-in subscriber questions and available answers.
- **Site Performance** – Monitor and control catalog category caching to improve site performance.
- **Catalog Item Display** – Determine catalog item dynamic field attributes as well as number of columns used for category-level product display.

MOBILE READY

Expand your commerce reach through sites that are optimized for “touch” with responsive design and adaptive delivery.

- **Customizable Doctypes** – Build sites that can be viewed with all standard mobile operating systems, including iOS, Windows, Blackberry and Android.
- **Mobile Compatible Pages** – Formatting vertical page views for catalog, product detail, shopping cart and check out is a standard feature in EDGE.



- **Page Variants** – Page layouts can be created to dynamically display when conditions are met (e.g., device type (desktop, laptop, smartphone, tablet; date; URL; and browser resolution settings).
 - **Responsive Design** – Dynamic CSS support enables sites to render correctly in both portrait and landscape formats.
 - **Adaptive Delivery** – Automatically display website based on browser compatibility.
 - **EDGE Mobile Project** – Deploy mobile site(s) as a separate project in EDGE so data can be siloed so the site can be managed independently of other websites.
-

STOREPOINT

EDGE StorePoint is a web-based solution that enables omnichannel fulfillment by managing pickup in-store and ship-from-store orders from an easy-to-use online user interface.

- **In-store Order Management** - Cloud-based accessibility, for store associates to view inventory and manage orders
 - **In-store Fulfillment** – Route orders to a specific store location selected by the customer for omnichannel store fulfillment and customer pick up
 - **Generate Order Documents** – Easily generates shipping labels, invoices and packing slips
 - **Auto-notifications** - Sends auto-notifications to customers when items are ready for pick up or have shipped
-

DIGITAL ASSET MANAGEMENT

Leverage advanced digital asset management capabilities to upload and store digital files in a dedicated repository. These assets can be displayed for viewing or downloading on web pages, product catalog pages, email communications, fulfillment documents and more to enrich the customer experience and enhance product merchandising.

- **Digital Asset Management** – Classify, manage, search and display digital files (image, videos, audios, electronic docs, etc.) on website content pages, customer profile pages, catalog pages, etc.
 - **Product Images** – Assign digital product image files to inventory SKUs enabling product images to be printed on fulfillment docs and order invoices.
 - **File Upload** – Upload digital assets to the repository individually or in bulk via file upload options.
 - **File Search** – Search files by name (alpha numeric), type (e.g., GIF, JPG, PNG, etc.), class (e.g., audio, video, zoom, thumbnail, etc) and create file groups.
 - **File Details** – Create, copy, view and edit file details, including name, description, class, type, links, etc. and add multiple language descriptions.
 - **File Links** – Embed file links to the internal repository and external sources, such as external URLs, email, etc.
-

RICH PRODUCT IMAGING

Enhance product merchandising with dynamic rich media tools and improve the customer experience by offering the capability to personalize products by uploading and manipulating images and adding custom text.

- **Rich Media** – Control the display of one or multiple images (thumbnail, hover, zoom, 360°-rotate, color/texture swatches, etc.) and multimedia files (images, videos, electronic docs, audio files, links, etc.) assigned to individual catalog items, catalog categories and catalog pages.
- **File Upload** – Allow customers to upload images or text for product personalization (e.g., monogramming, imprinting, embroidery, etc.).
- **File Manipulation** – Give the customer the ability to resize, watermark, add text and color-optimize images, including red eye correction.



CATALOG AND PRODUCT MERCHANDISING

Dynamically create and administer multiple B2C and B2B website catalogs and manage diverse product merchandising activities with EDGE's feature-rich and easy-to-use catalog management engine.

- **Catalog Administration** – Set-up and manage unique product catalogs in one or multiple B2C and B2B eCommerce websites containing physical, virtual and downloadable digital items for order.
- **Custom Catalogs** – Use configurable business rules to display custom catalogs for registered customers and B2B applications that feature unique items, product pricing and order quantity limits at the customer, group or member-type level.
- **External Catalog Feeds** – Set up external system attributes (ASIN, ISBN, Gender, Age, etc.) for use by EDGE when transmitting select product information to external shopping sites and comparison engines, including Amazon, Google Shopping and PriceGrabber.
- **Product Search** – Search items by product catalog or SKU number, product name or title, short- and long-description keywords, and user-defined product characteristics (refer to Site Navigation and Guided Search section for more details).
- **B2B Quick Search** – Search products by catalog item number, SKU, manufacturer number, supplier number, product brand, product type and other product characteristics, including user-defined dynamic attributes.
- **Virtual Products** – Administer the selling of virtual items such as online courses, manufacturer or extended product warranties, eGift certificates and more.
- **Digital Files** – Assign one or multiple digital files to catalog items that include audio, video, banner, electronic document, image, image special (360°), preview image, specifications, thumbnail, zoom, etc.
- **Product Pricing** – Set up and manage product pricing, including variable tiered, order quantity, percent and flat-rate pricing schemas (refer to Pricing and Promotion section for more details).
- **Order Quantity** – Control catalog item default order quantity.
- **Item Custodian** – Assign a “custodian” to catalog items enabling product administrators, buyers and/or managers to receive event-triggered email notifications based on catalog item activity.
- **Delivery Protocol** – Determine method(s) and options for how catalog items are shipped and delivered (e.g., Ship, eMail, Download, Fax, Print).
- **Multi-Language Catalogs** – Create multi-language catalogs in one or multiple websites and administer rules for website display (i.e. default language) (refer to Globalization and Internationalization section for more details).
- **Catalog Categorization** – Create unlimited categories and sub-categories to organize and manage large and diverse catalogs.
- **Batch Data Loads** – Batch import and export catalog data and updates from Excel spreadsheets, EDI, XML and other file formats.
- **Catalog Assignments** – Assign products to one or more catalogs, categories and subcategories individually or via bulk upload.
- **Schedule Item Display** – Schedule catalog item additions, deletions and changes for future publication or immediately display based on date and time.
- **Activate/Inactivate Items** – Activate or inactivate catalog items individually or categorically via bulk process.
- **Item Display Control** – Control display of catalog item based on inventory disposition (stock status), back-order rules and member permissions (Demand Rules).
- **Inventory Status Display** – Display item inventory status (in/out of stock or quantity on hand) in catalog.
- **Item Search Status** – Control the “search-ability” and display of catalog items in search results.
- **Kits/Assemblies/Bundles** – Create catalog item kits, assemblies and bundles consisting of one or multiple inventory SKUs.
- **Variable Attributes** – Support single- or multi-SKU dimensional catalog items consisting of styles, sizes, colors and other variable attributes at the product, product-category or product-type level.
- **Dynamic Attributes** – Dynamically create product information attributes for display in catalog without need for



database programming and IT involvement (information fields can be displayed as text, text box, check box, multi-select drop down box, radial buttons, etc.).

- **Suggestive Merchandising** – Use suggestive merchandising tools to manage product relationships, support cross-sell, up-sell and related product display.
 - » Administer merchandising activities manually or through bulk file upload process
 - » Control presentation order and display of suggested/related item(s) based on inventory on-hand status.
 - » Show suggested items based on customer order history, customer preferences, recently reviewed items, etc.
 - » Automatically display randomly selected, related or suggested items.
- **Substitution Rules** – Create rules for product substitutions that include activation period, shipping, promotions, inventory status and order requirements.
- **Prerequisite Rules** – Create prerequisite rules for product ordering (to order product A, product B must be ordered first, etc.).
- **Auto-Include Rules** – Use auto-include rules to ensure items are automatically added to the order. Auto-Includes can be configured at the order or item level based on product categories, customer groups, specific items, ship-to-states, customer attributes, start/end dates, etc.
 - » Control auto-include quantities, shipping rules, applicable promotions, duplication, backorders and qualifiers.
- **Product Reviews** – Add customer product reviews to product detail pages using Bizarre Voice™, or Power Reviews.
- **Product Comparisons** – Enable customers to evaluate products by displaying side-by-side comparison of product attributes on the website.
- **Wish Lists** – Give registered customers the ability to add catalog items to a product Wish List and enable those items to be added to cart.
- **Email-A-Friend** – Offer customers the option of emailing product favorites to friends and family.
- **“Recent” and “Most” Items** – Display recently viewed, recently ordered, most searched and most purchased items.
- **Comparison Shopping Engines** – Provide catalog feeds to comparison-shopping engines such as Google Base, NexTag, PriceGrabber, Buy.com, etc.
- **Product Personalization** – Give customers the capability to personalize ordered products using EDGE native or third-party plug-in applications.
Product Personalization includes additions or modifications to product text, images, logos, icons, colors, positioning and more (refer to Rich Product Imaging section for more details).
- **Personalized Product Pricing** – Control and display product pricing based on product personalization treatments and business rules, such as customer type, group affiliation, business account, marketing affiliate and more (refer to Pricing and Promotion section for more details).

SITE NAVIGATION AND GUIDED SEARCH

Set up and implement intuitive catalog and site navigation and search to make it easy for visitors to find products of interest.

- **Menus** – Flexibly implement multi-level menus for intuitive site navigation.
- **Active/Inactive Links** – Dynamically activate or deactivate site navigation links, controlling placement within the website.
- **Guided Search Apps** – EDGE supports all major advanced guided search applications and utilizes Hibernate Search Lucene as its standard solution.
- **Faceted/Filtered/Guided Search** – EDGE supports faceted, filtered and full text indexing and search, as well as advanced guided search.
- **Keyword Removal** – Enable customer to remove one or more keywords from search.
- **Keyword Refinement** – Allow for multi-dimensional array of keywords within the refinement options, i.e., an item can be assigned multiple values for a single refinement option class.
- **Results Refinement** – Dynamically recalculate and refine the available options based on the product search results presented to the consumer.



- **Item Counts** – Display item counts associated with each refinement value.
- **Search Results Display** – Control (or enable customer to control) catalog item search results, including sort order, number of items displayed, display format (e.g., list or grid view).
- **Breadcrumb Display** – Automatically display catalog query breadcrumbs.
- **Search Refining Tools** – Add search tools for refining search by category, product, price range, attribute (e.g., size, color) and dynamic fields.
- **Remove Options** – Enable the customer to remove refinement options previously selected.
- **Search Terms** – Manage list of search terms.
- **Correction Control** – Control keywords, descriptive phrases and misspelling corrections recognized by search engines.
- **Thesaurus Entries** – Add, modify and/or remove thesaurus entries.
- **Search Features** – Offer an array of search features, including hit highlighting, faceted search, dynamic clustering, database integration and rich document (e.g., Word, PDF) handling.

PRICING AND PROMOTION

Manage complex, tiered product pricing for B2C and B2B eCommerce websites, and launch revenue-generating promotions—on-the-fly or for a scheduled time period.

- **Pricing Display Options** – Leverage advanced product pricing display options to support B2C and B2B pricing schemas.
 - » List price, discount sale price, calculated savings, wholesale, multi-tier schemas, volume discounts, closeout, SKU (type/style/size/color), kits, seasonal, etc.
- **Multi-Tiered Pricing** – Build complex, multi-tiered product pricing schemas defined by variables that include date ranges, order quantities, discount treatments (percent change, flat price or flat change) and apply to individual customers.
- **Shipping and Handling Charges** – Manage customer pricing for shipping and handling charges (refer to Order Handling and Shipping section for more details).
- **Multi-Currency Pricing** – Display product pricing in multiple currencies across multiple websites (refer to Globalization and Internationalization section for more details).
- **Automatic Promotions** – One or more qualifying promotions can be automatically applied during check out without a promo code.
- **Sales Promotions** – Create and launch instant or scheduled (date range) sales promotions at the order, item or customer level using a variety of promotional treatments, including percentage off, dollar off, free shipping, one-time use, BOGO, buy one get promo item, but item A - get % or dollar off item B, and other flexible iterations and combinations.
 - » Item discounts can be applied based on order quantity ranges (tiered discounts – buy more, save more)
 - » Create unlimited item-level promotions and configure in mass via file upload
 - » Create free gift from product catalog or free gift not from product catalog
- **Promotion Rules** – Manage promotion rules and requirements, including start- and end-date, minimum sale amount, minimum number of items, required items, maximum discount, one-time use, applicability to auto-ship orders, etc.
- **Shipping Promotions** – Offer shipping promotions, including free shipping based on purchase of specific product styles or a dollar amount spent on a specific product styles; also offer flat off, percentage off or maximum discount applied to all shipments or selectively applied to specific shipping method, including store pick-up.
- **Shipping Upgrades** – Support automatic shipping upgrades.
- **Complex Promotions** – Build complex promotions that combine multiple offers (dollar off item A + Free Shipping + % off item B) from a single promotion code.



SEARCH ENGINE OPTIMIZATION AND SOCIAL MEDIA INTEGRATION

Create and manage search engine optimized websites with connections to social media channels to generate targeted traffic, improve conversion and enhance your search engine rankings.

- **SEO** – Create and administer websites that are fully optimized for search engine accessibility.
- **Meta Tags** – Set up and manage unique meta tags, including titles, keywords and descriptions for all web pages, including category and product pages.
- **Vanity URLs** – Automatically generate search engine friendly vanity URLs.
- **XML Site Maps** – Support XML site maps for easy indexes by major search engines, including Google, Bing and Yahoo.
- **Keyword Content Management** – Add and control page content to improve organic search placement.
- **Social Media Integration** – Leverage Facebook and Twitter integrations to unify your social media efforts.
- **301 Redirects** – Implement 301 redirects to protect and maintain search engine placement.
- **RSS Feeds** – Share content with popular blog and news sites with RSS feeds.

GIFT CARDS, REGISTRY AND MESSAGING

Offer a wide array of gifting options to enhance customer satisfaction and generate incremental revenue. Gifting options include Electronic Gift Cards (EGCs), gift registries and gift messaging, as well as custom gift wrapping and packaging.

- **Gift Card Transaction Processors** – Seamlessly integrate with third-party gift card transaction processors via EDGE's APIs.
- **Virtual Gift Cards** – Offer site-exclusive virtual gift cards and enable shoppers to:
 - » Purchase a secure electronic gift certificate/card on your website
 - » Redeem electronic gift card online, by phone or via fax
 - » Check balance and recharge electronic gift cards on your website
- **Gift Card Campaigns** – Create and edit gift card “campaigns” using EDGE's demand rules to assign a gift card number, status, type, value/budget, and start- and end-dates.
- **Gift Card Reports** – View and download (Excel spreadsheet) native gift card/certificate reports that can be sorted on the above-listed categories as well as amount used, balance and orders placed.
- **Gift Messages** – Allow shoppers to include gift messages and preview the message(s) on gift orders, including:
 - » Separate message for each individual
 - » Separate message for each item
- **Gift Wrapping** – Provide gift wrapping and enable shoppers to choose from a selection of patterns/papers for gift wrapping, wrap individual items or the entire shipment and preview gift wrapping.
- **Gift Boxes** – Offer various gift box options tied to purchase qualification.
- **Gift Basket** – Enable shoppers to place items in a gift basket.
- **Gift Registry** – Give registered customers the ability to set up personal gift registries containing a product list (and desired quantity) that can be shared via email with friends and family.
- **Charge for Gift Services** – Set up pricing for gifting services.

SHOPPING CART AND CHECK OUT

Implement intuitive, customer-friendly, secured shopping cart and check-out experiences that convert site visitors into revenue-generating customers. Increase AOV, repurchase frequency and reduced cart abandonment.



- **One-Step Check Out** – Streamline check out and reduce cart abandonment using an express, one-step check-out process.
- **Mini Carts** – Position mini carts (perpetual “Add to Cart” or “View Cart” buttons) on any web page enabling shoppers to quickly and easily view items and item totals via mini cart mouse-over pop-up and pop-over that can be expanded into full cart display.
- **Order By/Ship Time Clock** – Add “Order By/Ship Time” clock at cart or check out.
- **Purchase Limits/Budgets** – Display customer/member purchase limits/procurement budget balance at cart and check out.
- **Recurring Orders** – Provide for automatic reordering of entire order or specific order line item(s) in cart or at check out.
- **Order Notes/Gift Messages** – Allow customers to add order notes and gift message (refer to Gift Cards, Registry and Messaging section for more details).
- **Order Summary** – Provide order summary at cart and check out, including number of items, shipping, subtotals, discounts, tax and total, etc., and dynamically recalculate totals as customer makes edits to the order.
- **Shopping Cart** – Standard full shopping cart supports:
 - » [Multiple payment options, including debit cards, gift cards, purchase orders, PayPal, etc. \(refer to Payment, Taxation and Fraud Prevention section for more details\).](#)
 - » Display shipping options and applicable shipping and handling costs (refer to Order Handling and Shipping section for more details).
 - » Display product images, descriptions and stock status
 - » Product variant drop downs (color, sizes, style, etc.)
 - » Removal of items and adjustment of item quantity
 - » Entry of sales promotions codes and display of applicable discount amount
 - » Shipping information and policies
 - » Promotional messaging (e.g., spend \$50 more and receive free shipping) and suggestive merchandising (e.g., cross sell, up sell and recently viewed items).
 - » Display promotional banners, site search and other links
 - » Enable customers to add items from wish list and gift registry
- **Check Out** – Standard full shopping cart check out supports:
 - » Guest (no login) and expedited return customer check out (login) with billing and shipping address information automatically populated for return customers
 - » Enable guest (first time shopper) to create an account (customer profile) and allow returning customer to edit profile
 - » Recognize return visitors through use of cookies
 - » Display check-out breadcrumbs at top of page
 - » Create and store multiple domestic and international billing and shipping addresses
 - » Activate customer shipping address validation and correction at check out, registration and profile update (using Melissa Data)
 - » Validate customer telephone and email address format
 - » Automatically populate shipping address from “same as billing address”
 - » Control permissible billing and shipping countries and/or territories at check out
 - » Display shipping options and applicable shipping and handling costs (refer to Warehousing and Logistics or Order Sourcing sections for more details)
 - » Support custom shipping calendar that enables customers to select first available date or deferred delivery date and applicable shipping and handling costs
 - » Accept multiple payment options, including credit cards, debit cards, gift cards, purchase orders, PayPal or combinations thereof (refer to Payment, Taxation and Fraud Prevention section for more details)
 - » Enable customer to select from preferred credit card on file
- **Express B2B Shopping Cart and Check Out** – Provide business account customers with “purchase order-like” ordering experience that expedites the check-out process.
 - » Rapid item number Add to Cart, search or view entire catalog



- » Single page order creation and check out
- » Select and pre-populate billing and shipping address information from business account address book
- » Ship multiple ordered items or individual line items to multiple shipping addresses using different ship methods
- » Apply advanced business rules to control customer order quantity limits and display customer-approved payment methods based on customer (member) or account profile
- » Create saved orders as quotations that can be retrieved for future order placement
- » Access historical orders and order detail from shopping cart check-out page
- **Multiple Shipping Addresses/Methods** – Support shipping items from a single order to multiple “ship-to” addresses using multiple ship methods.
- **Dynamic Customer Profile Details** – Use dynamic fields to collect additional customer information for profile building (e.g., birth date, gender, anniversary, etc.).
- **Digital Files** – Enable digital files to be downloaded on the cart page or after check out.
- **Ship Dates** – Display ship dates at the order or line-item level.
- **Communication Preferences** – Capture customer communication preferences (e.g., newsletter sign-up, email marketing, etc.).
- **Secure Payment Processing** – Check out and payment processing SSL secured and PCI compliant (refer to Payment, Taxation and Fraud Prevention section for more details).
- **Multi-Language/Multi-Currency** – Automatically display correct language and currency based on customer’s locale (refer to Globalization and Internationalization section for more details).

MARKETING CAMPAIGNS, AFFILIATE REWARDS PROGRAMS AND SURVEYING

Create, track and measure the performance of marketing campaigns and affiliate rewards programs, and conduct customer surveys to understand customer needs and perceptions.

- **Campaign Reporting** – Track, analyze and report on order transaction activities by specific marketing campaign, marketing segment, marketing source (including Google AdWords campaigns), promotional offer and/or budget center, pinpointing the most successful to ensure marketing dollars are spent supporting company objectives.
- **Affiliate Marketing** – Set up and leverage affiliate marketing programs to drive site traffic and incremental sales:
 - » Create unlimited number of affiliates and affiliate sources (e.g., customer, individual referral or external website referral)
 - » Track and analyze order transactions from all affiliate sources
 - » Set up a variety of commission schemas (item total, order min/max, flat amount of revenue or a percent of revenue)
 - » Track and calculate affiliate commission payments/balances
 - » Generate and download commission reports
 - » Issue email communications to affiliates
- **Loyalty Rewards Programs** – Implement rewards programs that enable virtual currency (e.g., points, gratis dollars, etc.) to be used for full or partial payment of the customer’s order.
- **Customer Points Budgets** – Establish customer reward currency (points, gratis dollars, etc.) and budgets, and control allocation and active period (date range) for point usage and/or redemption.
 - » Track and calculate customer usage and balances from rewards program participation
 - » Use dynamic rules to enforce budgets, preventing customers from placing sales orders against a budget that has an insufficient balance to cover the order charge
- **Customer Segmentation** – Segment customers by geographic, demographic, purchase and other information attributes to support creation and execution of outbound marketing campaigns. EDGE enables users to create unlimited fields of information (attributes) to support direct and highly targeted marketing campaigns.
- **Customer Surveys** – Create information-rich customer survey(s) delivered through email or website posting.



- » View completed surveys/responses in the Survey List of the customer's profile
- » Use survey responses/feedback to develop marketing plans and campaigns, and/or to improve customer service/satisfaction
- **Historical Transaction Data** – Leverage historical transaction data to target customers and/or affiliates for marketing campaigns.
- **List Management** – Manage lists for outbound marketing campaigns in EDGE email engine.

PAYMENT, TAXATION AND FRAUD PREVENTION

Make it easy for your customers to do business with you by offering multiple, secured payment options that provide automatic sales tax calculation and advanced fraud protection through leading payment gateways.

PAYMENT

- **Secure Check-Out Pages** – Provide shoppers with a secure shopping cart and check-out pages via SSL and PCI certification.
- **Payment Gateway Integration** – Offer leading credit card payment options via integration to CC Payment Gateways, including Authorize.net, PaymentTech, Litle, Trust Commerce, CyberSource and PayPal (front-end only).
- **Gift Card Payments** – Support order payment using either EDGE-issued gift cards or those issued by third-party service providers including CLutch, Shift 4 and Mercury
- **Alternative Payment Options** – Offer customers alternate payment methods via an integration with Cardinal Commerce (Amazon Payments, Bill Me Later, Click and Buy, Credex, Ebates, Mazooma, eBillme, eLayaway, Moneta, SaftyPay, Ukash, MyECheck, PayPal, NYCE SafeDebit, Moneybookers, GreenDot and many others). Set-up and vendor service fees apply.
- **Real-Time Payment Processing** – Facilitate real-time payment processing for all major credit cards, including American Express, Visa, MasterCard and Discover, as well as merchant-issued credit cards.
- **Credit Card Settlement Options** – Choose credit card settlement either at time of order placement or time of order shipment.
- **Credit Card Validation** – Validate credit card via VVV, CVC and AVS.
- **Multiple Methods of Payment** – Allow customer to use multiple credit cards and methods of payment for a single order (credit card + gift card +PO).
- **Subscription Payment Processing** – Provide automatic payment processing of subscription orders (i.e., auto-ship and continuity order processing).
- **Multiple Credit Card Storage** – Store token (encrypted data) for multiple customer credit cards so they can be accessed during check out.
- **Multiple Billing/Shipping Addresses** – Accommodate unlimited number of billing and shipping addresses.
- **Payment Transaction Reporting** – Generate and download (Excel) summary or detailed payment transaction reports by day, week month, year or date range, as well as order-level payment transaction information, including transaction status, detailed authorizer data and responses (e.g., failure codes and reasons), transaction fees, currency, exchange rates, authorization transaction numbers, etc. (refer to Reporting and Analytics section for more details).
- **Refund Processing** – Process customer refunds and credits directly with supported payment gateways.

TAXATION

- **Sales Tax Calculation** – Native application support of flat-rate state sales tax calculation.
- **Value-Added Tax Calculation** – International value-added tax (VAT) and U.S. geo-code-level sales taxation supported through established integrations with third-party sales taxation service providers [Vertex](#), [Cybersource](#) and [Strikelron](#).
- **Shipping Tax Jurisdictions** – Orders display a jurisdictional breakdown of shipping taxes, providing the same level of detail that exists at the order line.



- **Tax Override** – Override control of Vertex and Strikelron tax rates.
- **Tax Exemption Rules** – Administer tax exemption rules at the product, item and/or individual member level.
- **Sales Tax Reporting** – View and download sales tax reports by jurisdiction and date range at the order and/or order line item level.
- **Tax Display at Check Out** – Manage the display of applicable sales tax on check-out page.

FRAUD PREVENTION

- **Fraud Protection Services** – Use fraud management tools and fraud scoring engine available through payment gateway fraud protection services.
- **Fraud Exception Queue** – Configurable fraud business rules enable orders to be placed into an exception queue based on fraud criteria, including:
 - » Order total, product categories, quantity of same product, returns percentage or dollar value, shipping address differing from billing address, IP address, specific shipping address, specific zip codes, specific town or city, specific state or province and specific country
- **Fraud Holds** – Apply processing hold to potentially fraudulent orders pending administrator approval.

GLOBALIZATION AND INTERNATIONALIZATION

Reach global markets and conduct business internationally thanks to EDGE’s support for multiple languages, currencies and localized market-level product pricing.

- **Global Commerce** – Support global commerce and users through EDGE’s web-based architecture.
- **International Address Formatting** – Flexible address formatting supports order capture and shipment of orders to international addresses.
- **Multi-Lingual** – Store and display multi-language characters through EDGE’s Unicode data fields.
- **Location-Based Content Display** – Assign geographic “locale” to a member’s profile so system can automatically display web content and catalog information in the language specific to a geographic region.
- **Location-Based Site Access** – Configure IP filtering to control site access based on geography (countries).
- **Location-Based Communications** – Customize customer notification email text (e.g., order placed, order shipped, etc.) in the customer’s language based on locale.
- **Location-Based Surveys** – Create multi-language customer surveys and issue to select geographic markets, customer groups and locales.
- **Location/Market-Level Promotions** – Launch geographic or market-level sales promotions and track transactional activities.
- **Location/Market-Level Pricing** – Automatically display geographic or market-level product pricing based on customer locale.
- **Multi-Currency Pricing** – Display product pricing in multiple currencies through currency exchange web services.
- **Base Currency Settlement** – Accept payments in multiple currencies with settlement to a client-definable base currency (e.g., dollars, euros, etc.).
- **Domestic/International Sales Tax** – Support domestic and international sales taxation through established integrations with Vertex and Strikelron.
- **International Shipping Carriers** – Offer international shipping service options via established integrations with domestic common carriers (e.g., UPS) and support for integration with other international shipping carriers.
- **International Order Tracking** – Provide International order delivery status with order- appended carrier tracking numbers.



ORDER CAPTURE

Build and deploy B2C and B2B web stores, micro sites and mobile sites to capture, aggregate and manage orders from all sales channels and order sources, streamlining the order management and order fulfillment processes.

- **Multi-Channel Order Capture** – Capture and aggregate orders from multiple online and offline sales channels and sources in multiple formats, and aggregate them into a centralized data repository and management environment.
 - » Order channels include consumer direct, distributor, wholesaler, retailer, reseller, public and private marketplaces, government and military, and others
 - » Order sources include B2C, B2B and mobile device websites (EDGE-based or external), call center(s), public marketplace(s), internal and external systems, EDI vans, application direct (EDGE CSR module) and others
 - » Order formats include Web Services, XML, EDI, FTP .CSV files, email and other electronic file formats
- **Business to Business (B2B)** – EDGE features advanced capabilities to support the capture of business-to-business orders:
 - » B2B shopping cart delivers a streamlined order placement and check-out experience
 - » Apply business rules to enforce procurement permissions and approved methods of payment (e.g., PO, Credit Card, Bill Me, etc.)
 - » Quoting through native saved order functionality

 - » Product catalogs containing products and pricing customized to the business account, customer group or individuals
 - » Business account address books to support shipment of items from a single order to multiple Ship-To addresses
 - » Capture and route quotes and/or saved orders (sales leads) to sales reps or groups
- **Direct Input Order Capture** – Give internal customer service departments and external call center service providers the ability to place sales orders and distribution orders (same items to multiple recipients) directly into EDGE through the CSR and Order Management modules.
- **Real-Time Order Tracking** – Access real-time tracking and reporting of order placement activity, including order source, marketing source, format, locale, project, promotion, portal, budget center, etc. External order reference numbers are appended to orders captured from external systems and sources (refer to Reporting and Analytics section for more details).
- **Real-Time Available to Promise** – Enable users to govern the acceptance of orders based on inventory availability and stock status (refer to Order Management section for more details).

VENDOR DROP SHIP PORTAL

Another weapon in the EDGE arsenal is the Vendor Drop Ship Portal, which helps merchants better manage their drop shippers and enables them to extend and optimize their omnichannel inventory sourcing.

- **Drop Shipper Access** – Gives drop shippers quick and easy access to manage and ship their orders. Information captured in this portal is instantly visible in EDGE enabling users to see and modify provider inventory levels.
 - » View and search ship requests
 - » Confirm that an order has shipped complete or partial
 - » See number of packages in shipment, along with items and quantities
 - » Print packing slips
 - » Integration to UPS provides label printing and pick up
 - » Generate and print invoices



ORDER MANAGEMENT

Manage orders across your entire business enterprise through real-time visibility and dynamic management. EDGE's OMS is a single command-and-control interface that applies business rules to ensure only perfect, fully executable orders are transmitted to the optimal provider for fulfillment.

- **Rules-Based Order Processing** – Apply complex business rules to govern how B2C and B2B orders are managed and processed through their lifecycle—from capture through delivery execution across one or multiple fulfillment points.
- **Order Types** – Creates and delivers fully executable orders to the fulfillment provider, regardless of type of order:
 - » Online eCommerce and offline sales orders
 - » Complex B2B and bulk orders
 - » Drop Ship orders
 - » Recurring auto-ship and continuity orders
 - » Digital asset and downloadable item orders
 - » Multi-recipient distribution orders
 - » Blanket purchase orders
 - » Return and exchange orders (RMAs)
 - » Split orders (multiple shipping addresses)
 - » Backorders and inventory reserve orders
 - » Payment exception orders
 - » Non-compliant orders
 - » Inventory stock transfer orders
 - » Warehouse work orders
- **Order Activity** – Access real-time views of order activity at the EDGE merchant, project or portal level, as well as order status and fulfillment disposition by warehouse, order type, order source, date range, date and time, handling priority and more.
- **Demand Rules** – Configure “Demand Rules” to control items and quantities available for order by specific customer and/or customer groups.
- **Auto Ship** – Offer customers an automatic product replenishment program via EDGE's Auto-Ship order capabilities that give:
 - » Website customers and EDGE users the ability to create orders that are systematically generated based on time frequency (number of days) and duration (beginning and end month/year)
 - » Real-time view of order status and disposition of past and future order shipments, including administrative controls to cancel future orders; change shipping address; modify order frequency, term, line items and method of payment; administer sales promotion rules for auto-ship orders; add order notes; and create order exception rules and actions
- **Real-Time Available to Promise (ATP)** – Facilitate last-item sell through and enable users to configure rules governing how backorders are accepted, processed and shipped (e.g., partial shipments).
- **Backorder Release Management** – View backorder release activities in real time and exercise administrative override of fulfillment provider (location), adjustments to FIFO schedule, cancellations of orders and/or order lines (items), control of number of backorders monitored for release.
- **Returns Management** – Use returns management tools and workflow to:
 - » Generate RMA numbers to originating orders and issue product return ASN to the warehouse
 - » Administer and enforce product return, refund and restocking rules that include issuing credit with or without product return
 - » View product return disposition and status in real time
 - » Enable CSR to process order returns, issue credit refunds (full or partial), manage product exchanges and return receipts
 - » Designate a global default provider/warehouse by country or state that will receive all returns; or enable the CSR processing the return to select a specific provider to receive the return



- **Split Order Shipments** – Process a single order containing multiple shipping addresses at the line-item level using multiple ship methods.
- **Address Validation** – Get real-time shipping address validation, correction and Residential/Business Identification (RBDI) via built-in integration with Melissa Data to support optimal carrier selection.
- **Blanket Order Management** – Create a bulk order that contains approved items and quantities available to authorized customers within a designated timeframe. This includes enabling administrators to:
 - » Set up new and edit existing blanket orders and approved methods of payment
 - » Authorize customers to place shipment requests
 - » Place orders on behalf of authorized customers
 - » Review blanket order activity and shipment requests at the customer level
- **Exception Order Management** – Apply rules that automatically place orders into an exception queue requiring administrative intervention (e.g., approve, cancel, modify) before orders are released for fulfillment execution. Standard exception rules apply to order total, shipment method, customer budget, tax calculation and payment gateway authorization codes. Custom exception rules can be created around client-specific requirements.

ORDER SOURCING

Automatically route orders to the optimal fulfillment provider (e.g., warehouse, 3PL, retail store, distributor, drop shipper, etc.) based on business rules to optimize inventory, reduce package delivery costs and Time in Transit (TNT).

- **Fulfillment Optimization** – Automatically route fully executable “perfect” orders to the optimal fulfillment provider based on configurable business rules.
 - » Improve order delivery performance, time and costs by order sourcing logic driven by customer promise date, provider proximity to customer, inventory availability (ATP), carrier services supported, carrier time in transit (TNT), hours of operation, holidays and other relevant factors
 - » Transmit orders in a variety of electronic formats, including XML, EDI, CSV, Flat file, email, etc.
 - » Configure rules to allow order line items to be sourced to multiple fulfillment providers for shipment
 - » Order sourcing audit enables users to view at order level:
 - Provider-selection logic and decision sequence
 - Item shipment request by provider
 - Item shipment status by provider
 - Delivery disposition (tracking number) of items shipped by provider
 - » Create, view and edit provider attributes/operational profile to support decision logic for provider selection, including:
 - Location time zone
 - Hours of operation
 - Maximum order processing capacity
 - Turnaround SLAs
 - Daily cut-off time
 - Transportation carriers and associated TNT
- **Drop Ship Orders** – Automatically source orders from the manufacturer or other drop-shipper location.

ORDER HANDLING AND SHIPPING

EDGE’s APIs enable seamless integration with any carrier shipping system to support the listing of a wide range of provider services based on how the merchant configures the business rules that control which customer shipping options are offered.

- **Domestic and International Carrier Options** – Display shipping costs and options for both domestic and international



order handling and shipping via integrations with carrier systems.

- **Shipping Methods** – Configure business rules to govern approved shipping methods by customer type and group.
- **Least-Cost Routing** – Provide least-cost-routing option by factoring in customer promise date, RBDI and provider TNT.
- **Remote Order Handling and Shipping** – Enable CSRs at remote or retail locations to manually process order settlement and shipping (e.g., reconcile items, generate packing slips and order invoices, upload carrier information and ship confirm).
- **Shipping and Handling Fees** – Set up customer shipping and handling fees by customer type, carrier and service level. Configuration options include:
 - » Charge published carrier rate or customize S/H fee by order weight, order \$ total, \$ per item, \$ per line item, \$ per order, % of order total or % surcharge
- **Order Delivery Calendar Display** – Support implementation of a calendar that displays preferred order delivery date and applicable shipping costs. Enable customer to request order delivery date.
- **Address Books** – Allow customers to set up “Ship To” address books and assign default shipping address and method.
- **Multiple Shipping Locations** – Enable customers to ship individual items or line items to multiple addresses.
- **Order Handling** – Provide warehouse with instructions for special order handling, packing and kit assemblies at the order and item level.
 - » Include assembly instructions for complex BTO kits (e.g., SKU components and quantities, kit placement, sequence, etc.)
 - » Assign priority status, partial and ship-complete instructions
- **Custom Packing Slips** – Attach artwork files to support packing slip customization.
- **Shipping Promotions** – Create and administer shipping promotions (refer to Pricing and Promotion section for more details).
- **Ship Request Disposition** – Manually update the disposition of a warehouse shipment request (e.g., Ship Complete, Ship Partial, Ship Cancel), including carrier tracking information and shipping cost updates.

SKU MANAGEMENT

Gain transparency and a consolidated view of inventory (SKU) activities across all sales channels and inventory supply network through EDGE's multi-location inventory management capabilities that provide real-time ATP, automatic inventory degradation, low-stock notifications, and automatic inventory synchronization between EDGE and the WMS and ERP system.

- **Real-Time, Multi-Location Inventory Management** – Create, view and manage inventory and the associated activities, rules and processes in real time across one or multiple inventory sources and stocking locations (e.g., warehouses, retail stores, distributors, drop shippers, product suppliers, etc.). This includes:
 - » Physical and virtual Stock Keeping Units (SKUs)
 - » SKU attributes, including cost, Unit of Measure (UOM), dimensions and weight, color and sizes, manufacturer and part number, UPC along with an unlimited number of dynamic attributes
 - » Build-to-order, build-to-stock kits and product assemblies
 - » Digital Print-on-Demand inventory SKUs
 - » SKU revision and automatic replacement
- **Business Rules** – Administer business rules to manage and optimize inventory, including back order, available for sale start and end dates, re-order points, returnable, restockable, refundable, secure shipment, dock to stock and more.
- **SKU Assignments** – Assign inventory SKUs across one or multiple inventory warehouse locations.
- **Serialization** – Manage product serialization.
- **Work Orders** – Create work orders for kit assemblies, disassemblies, re-builds, destructions and transfers of inventories between warehouses and stocking points that include automatic creation and transfer of bill of materials and ASNs to the WMS for execution.
- **Inventory Pricing** – Two fields, Sales SKU Price and Retail SKU Price, are available during SKU creation.
- **Inventory Data** – Aggregate inventory data supplied by either internal or external service provider WMS and ERP systems.



- **Inventory Visibility** – View inventory on-hand, on-hold, reserved (allocated to order), future demand, available for sale, SKU cost and value, and last transaction date.
- **Inventory Alerts** – Automatically generate low-stock and back-in-stock email alerts to item custodians/customers.
- **SKU Custodian** – Assign SKU custodian to support reporting by specific person or department.
- **Advanced Shipping Notice** – Create electronic ASN for scheduled material receipt. ASNs can include “manual return” as source type. When viewing details of an order or a return, a link to the ASN is provided.
- **Backorder Management** – Support real-time back order management calculated by inventory availability across the entire supply network.

WAREHOUSING AND LOGISTICS

Quickly set up your global order fulfillment and product supplier network, view and administer disposition of order shipment requests, create and process inventory ASNs, and manage stock transfers.

- **Supplier Network** – Assign product suppliers for inventory shipments.
- **Provider Network** – Set up fulfillment providers to receive orders for fulfillment.
 - » Fulfillment providers can be warehouses, external 3PLs, retail store locations, product suppliers, distributors, drop shippers or any other entity providing order fulfillment services
 - » Configure fulfillment provider attributes used for order sourcing logic (hours of operation, time zone, inventory SKUs, order capacity, carrier services, TNT, method or data transfer, etc.)
- **Order Disposition** – View disposition of sales orders, work orders (assemble/build) and return/exchange orders assigned to warehouse(s) and fulfillment provider(s).
 - » Filter order information by warehouse/provider, date range, order type, order status, work order type and ship method
 - » View order shipping detail, including ship request date, ship date, carrier selected, method of delivery and tracking numbers
 - » Generate and download order activity reports in Excel
- **Stock Transfer** – Create work orders for stock transfer and view disposition of incoming and outgoing inventory activities.
- **Inventory Adjustments** – Adjust inventory on-hand with configurable reason codes.
- **Shipping Reassignment** – Automatically reassign method of shipping for orders and backorders by date range.
- **Advance Shipping Notice** – Process ASNs for one or multiple warehouse locations.

CRM AND CUSTOMER COMMUNICATIONS

Supported by a powerful relational database, EDGE captures and connects all of your eBusiness customer touch points, providing a 360° view of customer information, interactions and transactions. Benefit from broadcast and event-triggered email communications so you can proactively manage customer relationships, build loyalty and drive repurchase frequency.

- **Customer Intelligence** – Provide users with real-time access to B2C and B2B customer profile information, site interaction and purchase transaction data.
 - » Find customers quickly and easily using filtered search (name, address, user name, customer type, origin, status, group and registration date range)
 - » List customer groups and customers by type, group, locale, status, origin and source
 - » View and edit detailed customer information containing:
 - Creation date, origin, source, campaign, system number, expiration date
 - Profile (type, sales territory, group affiliation, marketing segment, promotion eligibility, product price list, procurement budget status, etc.)



- User name, password, last login date, consecutive bad login attempts and last password change date, etc.
- Billing and shipping addresses (address books)
- Demographic data (age, gender, occupation, income, DOB)
- Payment (credit status, preferred payment method, save payment information, tax number, procurement budget activity and balance)
- Preferences (shipping, communication, email format, opt-in permission status)
- Customer notes and recorded complaints by category
- Custom dynamic fields of additional customer attributes
- Registered product(s), wish list(s) and survey(s)
- Affiliate member associations and referrals
- » View complete historical transaction activity, including sales orders, digital downloads, EDGE broadcast emails and completed customer surveys
- **Site Visit Analytics** – Give users extensive information and valuable insights into customer visitation, behavior and interaction with your EDGE powered website via full integration with Google Analytics.
- **Digital Files** – Assign digital files to customer records (image, video, audio, electronic documents, etc.) and control display on website.
- **Groups and Accounts (B2B)** – Create and assign customers to unique groups and B2B accounts to:
 - » Enable presentation of a custom catalog by apply purchasing “Demand Rules” that govern display of products in website catalog, control item order quantity and enforce customer credit card spending limits
 - » Support customer segmentation reporting
- **Locales** – Assign customers to “locales” to administer rules that govern the language displayed on the web page and in the catalog content (refer to Globalization and Internationalization section for more details).
- **Custodian** – Assign customers and customer groups to a “custodian” (internal program administrator) to support segmentation reporting.
- **Event-Triggered Communications** – Provide timely communication of important information to program administrators and customers alike with automatic, event-triggered email notifications.
- **Third-Party Integrations** – Leverage EDGE’s APIs, OpenTools and Enterprise Service Bus (ESB) adapter to seamlessly integrate with third-party applications and tools (e.g., Seibel, Salesforce.com, etc.) to extend CRM functionality.
 - » With more than 35 options to choose from, users can activate automatic email notifications for: New Customer Registration, Affiliate Member Sign Up, Demand Rules Change, Inventory Item Back in Stock, Order Placed, Order Shipped, Order Canceled, Item on Backorder, Order Exception, Failed Payment, Low Stock, Pending RMA and more
 - » Manage main body message content, text font and color, subject line reference, sender and reply email address, email recipient(s), email notification active dates (start/end date), email presentation format (text/html), email priority status and more
 - » Create email message content in multiple languages and transmit language version based on customer locale
 - » Send order-related event communications based on member type
 - » Control inclusion, display and/or attachment of specific information attributes, such as order detail, product pricing and order status

CUSTOMER SERVICE

Enable CSRs to place, look up and manage customer orders and related customer information in EDGE’s built-in Customer Service module, including adding or updating customer address, customer comments, processing returns and applying credits.

- **Direct Order Entry** – A user-friendly, easy-to-operate Customer Service UI enables users to efficiently support of a broad range of customer service activities including:
 - » Create and edit customer account profiles, notes, address books, price lists, purchasing budgets, acceptable payment types, communication preferences, website login, available promotions, etc.



- » Set up customers by type (registered, guest, etc.) and assign to unique groups for enforcement of ordering business rules
- » Configure category and sub-detail of common customer comments, complaints and/or issues for tracking and reporting over a specified time period to identify trending
- » Search customer information using standard (name, ID#, organization, order #, email, postal code, address, etc.) and user-defined (dynamic) information fields
- » Retrieve complete customer profile information, including account status, customer interaction notes, inbound calls and reason codes, order history by date range and status, pending, saved and return order disposition
- » View entire product catalog or search for specific catalog items by category, keyword, item name and/or number
- » Access real-time inventory information (e.g., status and on-hand quantities available for purchase)
- » Select fulfillment provider/warehouse, order priority, assignment of billing, affiliate and promotion codes, add order header and shipping notes, designate orders for auto-shipment, mark orders for gift wrap, etc. on single page
- » Create split order shipments that enable items to be shipped to multiple addresses using various ship methods
- » Enter, review, cancel and process returned and saved orders
- » View return order history, including returns to date and refund value against order value
- » Issue RMAs and process credit card refunds at the order or line item level
- » Enable authorized users to issue appeasements and/or shipping refunds in addition to replacement, replacement without return, return only, refund or refund without return
- » Give authorized users the ability to create and place orders that override or bypass established business rules

PURCHASE ORDER MANAGEMENT

Create, issue and track product supplier Purchase Orders (POs), and automatically use the Purchase Order data to generate ASNs.

- **Supplier Purchase Orders (PO's)** – Create, issue and manage POs for inventory SKUs contained in the system.
 - » Create various types of POs, including Standard, Bid and Blanket
 - » Automatically populate PO data for ASN generation
 - » Create and/or relate multiple ASNs to a single PO
 - » List and view POs by date range, status (all, pending approval, open, on-hold, partially complete and closed)

REAL-TIME REPORTING

EDGE stores business-critical transactional data in a centralized database and provides users with access to a broad range of standard reports that can be sorted and customized using data filters such as time period, date range, activity status and other attributes. EDGE reports can be downloaded in Excel summary and detail format.

- **Transactional Data** – Access critical transactional data with on-demand reports that offer insightful, real-time information about orders, inventory, catalog, customers and other transactional activities, including:
 - » **Orders**
 - List – View order activity by order type (Sales Order, Work Order or Return/Exchange Order) order status (Backordered, Canceled, Complete, Under Review, Approved, Reserved or Picking), ship method and billing code
 - Exception – Review exception order details (including order type and ship method) with exception reason code
 - Returns – View order returns
 - By Member – Analyze member order transactions by member type, status, group and locale
 - By Group – View member group order activity by order type, order status and ship method
 - Maps – Access map view of summary order activity and order revenue (view by continents or U.S. state-level totals)



REAL-TIME REPORTING (continued)

- Calendar – Access calendar view of monthly and daily order activity and revenue
 - Promotions – Track order activity by promotional campaign code
 - Warehouse – Review disposition of sales orders, work orders and return orders by individual warehouse
 - Marketing Source – Track orders, sales revenue and inventory usage for a specific Marketing Campaign
 - Budget Center – View orders placed against an established budget center or member budget (Gratis)
 - Unbilled Demand – Review scheduled auto-ship and continuity orders in shipping queue
 - Average Units/Order – Access order composition by units
 - Annual Sales – Select any calendar year to view monthly order and return order sales activities
 - Total Sales – Select daily/weekly/yearly sales trends by State, AOV, Items, AIO, Returns, Count by Order Source, and Best Sellers
- » **Shipments**
- Order Shipment Detail – View details of order shipments by provider, status (Shipped, OpenTools Ready, OpenTools Processed, Picking and Partial), ship method, date range and time period
 - Delivery – Check delivery status of orders through carrier tracking information
 - Auto Ship Activity – Review promotional Auto Ship activity and/or canceled Auto Ships by the catalog code for a given date range.
- » **Alternative Orders**
- Virtual Orders – See all non-physical order activity (e.g., electronic document downloads, email or fax)
- » **Payment Transactions**
- Payment – Access credit card processor and other payment transaction detail by order
 - Tax – View applicable sales and use tax amounts on all orders by jurisdiction if applicable
- » **Inventory**
- SKU – Review SKU views by custodian, provider or starting character (this report displays SKU No., Name, Type, Providers, On-Hand (quantities), Cost and Total Value based on On-Hand x Cost)
 - Stock – View the stock report by SKU No., SKU Name, Custodian, SKU Type, Provider(s), Cost, Value, On-Hand, On-Hold, Reserved, Available, Out of Stock, Incoming ASN and Last Transaction Date
 - Stock Transfer – Access inventory stock transfers between providers, warehouses and/or suppliers for a given date range
 - Backorders – Review backorders by SKU No., SKU Name, Custodian, Provider(s), On-Hand/Reserved/Available/Backordered and In-Bound ASN (quantities)
 - Backorder Notification – View all back-ordered inventory and access email acknowledgements, or filter the display by provider, warehouse and/or supplier
 - Expired SKU – Review SKUs that have expired by SKU No., SKU Name, Custodian, SKU Type, Category, End Date, Provider(s), On-Hand (quantities), Cost and Total Value Based on On-Hand x Cost
 - Low Stock – Access low-stock inventory status by SKU No., Name, Custodian, Type, Reorder Point, Max Build Qty., Lease Time, Providers; On-Hand, Reserved, Available and In-Bound (you also can view the individual SKU Cost and total Value based on On-Hand Qty. x Cost)
 - ATP Low Stock – View inventory data by custodian, used in a kit or by low-stock status
 - Usage – Identify the SKU No., SKU Name, SKU Type, Custodian, Provider and Usage, Sales & Work Orders per Provider (this report can be filtered by the SKU starting character, custodian, provider, SKU type and From/To date ranges)
 - SKU Revision – View the Parent SKU (number), SKU Name and SKU Type with the Revised SKUs, SKU Name Revision Date and Replacement Option per SKU (this report can be filtered by the SKU name starting character)
 - Work Orders – Manage work orders by status or work order type; they can be sorted by the order date or the order ID and include reference, source and detail information
 - Work Order/ASN – Review work order by status, work order type or Advanced Shipping Notification status; they can be sorted by the order date or order ID and include the reference, ASN ID, ASN status, and quantity expected and received
 - Kit Revision – View the Revised Component SKU No. and Revised Component Name per SKU and filter the report by the Kit Header SKU starting character to view the Kit Header SKU Number and Kit Header SKU Name



REAL-TIME REPORTING (continued)

- ASN History – Track all transactions that occur during selected time period for each Advanced Shipping Notification
- Inventory Sync – Compare EDGE On-Hand balances against the Provider for a selected time period
- Inventory Activity – Display all in-bound transactions and adjustments against providers and SKU quantities
- Activity Summary – Compare transaction totals to the starting On-Hand balance quantities
- Inventory Balance Audit – Track the in-bound activity transactions against the SKU
- Lots – View a list of lot numbers shipped or received for a selected date range
- Serial Numbers – View serial numbers and drill down for SKU, provider and ASN detail information
- Automatically Generated SKUs – Review list of new SKU numbers generated by EDGE
- » **Catalog**
 - SKU Assignments – View a summary listing of all SKU assignments per catalog item. Easily filter the display by the item name starting character, status and start date to see associated SKU, SKU name, status and start/end dates
 - SKU Detail – See catalog SKU type count, total items count, active items count, inactive items count and top sellers
 - Expired Items – Access a summary listing of all expired items by catalog item, catalog code, catalog name, end date, status and type. Sort by the end date or filter the catalog item starting character, custodian, current and next planned Week, Month or Year
 - Usage – Compare the catalog usage of each item by sales order
 - Bundle Usage – Display the catalog item and count on orders that are not new, saved or under review
 - Item Activity by Campaign – Monitor inventory by marketing activity for each merchant
 - Related Items – Compare the relationship between the catalog item and other grouped catalog items
 - Rule Changes – Review the revision history for each catalog rule
 - Rule Assignment Changes – Track catalog rule change assignments made against a catalog rule
 - Category Assignment – Display each category and the catalog item assignment
 - Search String – View the catalog item search-strings by date range for each merchant
 - Catalog Shipped – Display Catalog, Picking or Approved Items shipped during a specified period
 - Categories – Locate the category and all sub-categories to see if they display on the front end
- » **CRM/Customers**
 - List Customers – Display all customer profile data sourced from bulk uploads, external systems, manual entry into EDGE or from the online web stores through direct registration and/or order placement
 - List Groups – Select a group's name to drill down to the selected Group Orders List Report, which displays orders placed within the past seven days of the system's date
 - Total Sales – Count total sales for each customer type
 - Catalog Rules – Display all customer rules for Catalog and Catalog Rule presentation
 - Customer Transactions – Track customer transactions and drill down to detailed transaction data
 - Group Transactions – Track group transactions by merchant and drill down to detailed transaction data
 - Registered Product – View product registration for each customer
 - Wish Lists – Identify popular catalog items based on customer activity
 - Email Subscribers – List customer email information by group, type and status
- » **Warehouses, 3PLs & Drop Shippers**
 - Inventory – Display Cost, Value, Current Status and Count of items for each Warehouse, External DC and/or Drop Shipper
 - Provider Orders – Review orders processed by Warehouse, External DC and/or Drop Shipper for each merchant
- » **Promotions**
 - Promotion List – Display all Promotions defined in EDGE and a transactions count that indicates the total number of Sales Orders that used that Promotion Code
 - Promotion Order List – View summary order data by promotion (including ship method, date range, status or individual status, such as Backordered, Canceled, Complete, Under Review, Approved, Reserved or Picking)



REAL-TIME REPORTING (continued)

- » **Marketing Tracking**
 - Order Marketing Source – Display summary listing of orders, sales revenue and inventory usage for a specific Marketing Campaign
- » **Budget Center**
 - Budget Usage List – Access a summary of budget usage against a selected Budget Center
- » **Surveys**
 - Survey List – View list of executed surveys and survey results by customer
- » **Customer Complaints**
 - Complaint List – Review list of customer complaints entered into EDGE by CSR, including Date, Customer Name, Complaint Notes, Category and Code (complaints can be sorted by Complaint Category and Complaint Code and filtered by date range, and viewed or downloaded in Excel)
- » **Affiliate Marketing**
 - Affiliate List – View a list of affiliates and related activity that includes Referred Members, Referred Orders, Total Sales, Commissions accumulated and affiliate Budget Adjustments
- » **Broadcast Email**
 - Broadcasts – Review the details for each email and monitor the success of the email distribution
 - Bounce Log – Audit the list of undelivered emails and remove unwanted recipients and opt outs
- » **Gift Certificates**
 - List Certificates – Review the list of Gift Certificates issued and any actions taken against those certificates
- » **Integration**
 - Message Log – Access a list of message activity by date range and filter by message type and error flag. The message log also allows configurable search options to enable users to define which part of a particular message type can be queried
- » **System Interaction**
 - Audit List – Monitor and track user interactions within the application modules and database
- » **Business/Selling Rules**
 - Catalog Rules – Display all customers with associated rules set up for ordering permissions (view by last name in descending order and see the interaction between a customer and Catalog; administrator can use this report to validate Catalog and Catalog Rule presentation; rules can be created to enforce broad or very specific items or used to enforce a specific event against a Catalog Item or across the entire Catalog)
- » **Product Registration**
 - Registered Product List – View all members that have registered products and view the related product registration details, such as registration number, customer data and purchase data
- » **Purchase Orders**
 - Purchase Order Status – Access a date range-driven view of purchase orders created and their disposition, including Open, Pending Approval, On-Hold, Partially Complete and Closed
- » **Data Analytics**
 - Member Analytics – Extract member data into a customized report
 - Order Analytics – Use your order data to interact with other data sets in a customized report
 - Inventory Analytics – Set data points and filters to track inventory in a customized report
 - Catalog Analytics – Use chart formats, colors and legend to view catalog data in a custom report
 - Provider Analytics – Download query provider data into Excel or PDF
- **Ad-Hoc Reporting** – Use optional DataMine and Microsoft SSRS for ad-hoc reporting and data analytics.
- **Export to BI Tools** – Export data to third-party Business Intelligence tools.
- **Website Analytics** – Get comprehensive website traffic, customer behavior and interaction reporting via integrations to Google Analytics and Urchin (refer to Website Analytics section for more details).

CHANNEL ANALYTICS

EDGE enables marketers to gain a real-time, multi-dimensional perspective of site performance with actionable data that can be displayed in a wide array of customizable graphical views both on- and offline, providing critical customer behavioral



insights that can be used to improve site sell-through, launch marketing campaigns, optimize inventory and enhance customer service.

- **Drag-and-Drop Widgets** – Users can personalize their Analytics dashboard using drag-and-drop widgets. They simply select the analytics widgets that provide the most relevant data to their role, and place them where they want them to appear within their dashboard.
 - » Visits Summary – Access all site visits as well as visits over time, visits by local time, visits by server time and visits by day of week.
 - » Live! – See where the world your site traffic is coming from in real-time with a global heat map that shows visitor locations, as well as a real-time counts and visitor details, including listing pages visited, IP addresses, browser settings, etc.
 - » Visitors – In addition to identifying visitor location by continent, country, region and city, understand how often and how long visitors are interacting with your website using a frequency overview that displays returning visits, length of visits, pages per visit, days since last visit and a range of other custom variables.
 - » Visitor Settings – Find out which devices are being used to access your site, including operating system, language and settings, screen resolution and orientation (normal/widescreen), browser information and any plug-ins.
 - » Actions – Learn how visitors interact with your site, including entry and exit pages, outlinks, downloads, referrers, search engines, keywords, social networks, campaigns and more.
 - » Goals – Define and set up goals (e.g., number of orders, number of items in order, total cart value, etc.) and then track your site's progress toward achieving these goals over a specified timeframe so you can determine the effectiveness of your corresponding marketing campaigns (including Google AdWords campaigns).
 - » eCommerce – Keep tabs on all the eCommerce activities on your site, including the number of orders, revenue and conversions generated by product SKUs, categories and names.

 - » SEO – Track top keywords for each page URL on the site as well as your overall site SEO ranking. All of these analytics can be personalized by the individual user so their dashboard displays the data that's most relevant to their job function.
- **Google Analytics** – Import previous Google Analytics into your dashboard to ensure all historical site data can be viewed and compared with current activities in a single location.
- **Detailed Reports** – In addition to dashboard views, analytics can be downloaded on demand. These reports also can be distributed in email alerts to select departments and individuals, and scheduled for periodic distribution, i.e., daily, weekly or monthly, or any other timing sequence the business may require.
- **APIs** – Applications, plug-ins and customizable features are available to help you integrate Analytics into your organization's workflows.

BACKEND SYSTEMS AND SUPPLIER INTEGRATION

EDGE's APIs, OpenTools integration layer and Enterprise Service Bus (ESB) adapter eliminate the need for third-party integration solutions and seamlessly integrate with internal legacy and external service provider systems to maximize your IT infrastructure investments, streamline exchange of data and provide enterprise-wide visibility over all of your eCommerce activities.

- **Integration Layer** – Integrate seamlessly with:
 - » Supplier, trading partner and internal legacy back office systems including ERP, WMS, TMS, CRM, Financial, PIM, ECP, CMS and more
 - » [Third-party applications and service providers include credit card Payment Gateways, Sales Tax Data, Customer Product Reviews, EDI Vans, Electronic Gift Card, Address Verification, Delivery Service Providers, Broadcast Email, POS systems, Product Personalization, Rich Media, Web Analytics and more](#)
- **Data Formats** – Support all data formats, including XML, EDI, CSV, etc.



- **Data Transmission** – Support transmission of data via web services, FTP, HTTP, AS2, MQ Series and other methodologies.
- **Message Library** – Access an extensive library of pre-defined XML messages to support transmission of data between systems relative to catalog items, orders, inventory and supply chain business processes.
- **Message Translation** – Support automatic translation of incoming and outgoing messages to EDGE standard XML format.
- **Message Audit Log** – Provide an audit log of all incoming and outgoing messages with message detail (e.g., message type, status, date and time, etc.). OpenTools enable messages to be searched, edited and rerun in case of error.
 - » Users can configure search criteria for OpenTools message retrieval and reporting
- **Systems Synchronization** – Access auto or manual system synchronization of inventory SKUs and on-hand stock balance.
- **Marketplace/Comparison Shopping Engine Integrations** – [Leverage established integration with Amazon marketplace, Google and PriceGrabber.](#)

SECURITY AND COMPLIANCE

EDGE provides complete operating access, security and control for the merchant’s user groups. The platform is certified PCI-DSS compliant and meets HIPAA and Safe Harbor requirements. Data is secured through SSL encryption and access is controlled through dynamic user roles and privileges.

- **Authentication Web Service** – EDGE uses “authenticateUser” for its public Security Service to Enterprise Application Integration Service Function (EASIF). This increases security in the EDGE platform for third-party integration applications.
- **Password Protection** – Restrict or grant access through password protocol to specific EDGE functionality, privileges and related information. Passwords are hashed and cannot be decrypted.
- **Password Resets**– User password resets can be either manually or systematically managed based on a prescribed time period.
- **User-/Module-Level Privileges** – Read, write, modify and delete privileges and rights are dynamically restricted at the individual user and module level.
- **User Classifications** – User accounts are dependent on access-type classifications.
- **IP Filtering** – Configurable IP filtering enables merchant to control site access (refer to Globalization and Internationalization section for more details).
- **Integration Authentication** – API integration requires https with authentication.
- **SSL Encryption** – All financial transactions are SSL encrypted.
- **Network Security** – Jagged Peak’s data center has the latest network security with daily data back up to an off-site archive/disaster recovery site.
- **HIPAA/Safe Harbor/PCI-DSS** – EDGE is HIPAA, Safe Harbor and PCI-DSS certified (Level 2).
- **Google Captcha** - Protect your websites from spam and abuse. Enable Google Captcha to verify site visitors

EDGE version update email notifications are sent when there are enhancements and trouble ticket solutions. EDGE online support is available via the application’s Help feature and the ViewPoint portal; live support is available through the Technical Help Desk.





**Contact Jagged Peak today
to speak to an experienced
eCommerce professional.**

Jagged Peak, Inc.

7650 W. Courtney Campbell Cswy.

Tampa, Fl. 33607 USA

Telephone: 813.637.6900

Toll-free: 800.430.1312

Email: sales@jaggedpeak.com

www.jaggedpeak.com