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What is CustomerConnect

Please review this section to understand the general usability and feature set of the CustomerConnect interface. The interface works as a customer portal and allows read access to business related information and settings along with update/create access for preferences, contact information etc.

The current feature set of CustomerConnect includes the following:

Customer Login – Allow the login of current customers with a registered email address or the signup of a new customer.

• Customers will login with a current email address and password
• Current customers with a registered email address may use the website and supply the email address and last four digits of the registered phone number to gain access to the site. The first time they use the phone number they will be required to supply a “Password” for future access to the site. Once this new “Password” is saved access to the web site with the last four digits of the phone number are disabled.
• Customer may change the password at any time once they are logged in to the web site.
• If a customer forgets password, they will be notified via the “Forgot Password” option
• *Any user with security rights may change the SPOT password via the SPOT interface on the Customer Profile > Details > Password field located in the lower right corner of the screen. “No” users of SPOT will see this password; users will see just ***** for the current password in SPOT.
• On the customer “Login” page you may supply custom instructions and comments to assist your customers in using the site.
• You may track how many customers are using CustomerConnect. Each time a customer logs in it Creates a “Login” entry in CRM for the customer. You can report on CRM entries to see how often the site is used.

Customer Information – Ability for the customer to add or update the following fields.

• Name
• Password
• Email Address
• Default Address, City State and ZIP
• Delivery Address, City State and ZIP
• Billing Address, City State and ZIP
• Home Phone
• Cell/Mobile Phone
• Work Phone
• Other Phone
• Notification that include (Optional)
  o Route Delivery reminder phone calls via SPOT Telephony interface
  o Route Delivery reminder email via SPOT reporting services
  o Overdue Inventory reminder phone calls via SPOT Telephony interface
  o Email at the time an order is detailed
  o Email at the time the order is racked
  o Email for Special Promotions or Coupons
• Credit Card on File and expiration (includes multiple cards)
• Preferences defined in SPOT (optional)
• View Frequent Buyer / Reward Points balance (optional)
• Customer Referral (optional)
• Frequent Buyer Balance (optional)

Order Status – Ability to view current orders by status

• Quick
• Detailed
• Sold
• View invoice details including payment information for any order via the “Visual Invoice”.
• Ability via configuration to define order status naming for both route and delivery customers. Please review the web interface and configuration guide below to see the different status naming options available.

Garment Search – Allow your customer to find all garments by type, brand, color or department.

A/R Payment – Allow you’re A/R customer to make a payment on account. This payment is for A/R customers only and does “NOT” support payments for non A/R customers. A customizable email response to the customer is available for this feature.

Statement Review – Allow you’re A/R customer to review statements for the current and past periods along with current activity not posted to a statement and past payment history.
Route – Allow your route customers to schedule a pickup request or create a route pickup cancellation period.

Message to Manager – Allow your customer to send a “Message to the Manager”. This message is sent to the SPOT messaging system.

CustomerConnect Types

Templates
CC templates are supplied by SBS for use in our hosted environment and create a default configuration for your site. Using the base template and using your Spot configuration options you have a full featured CC site.

API Interface
CC offers a “Application Programmers Interface” or API providing you the option for a custom developed interface to your Spot customer data. You may choose to create a complete customer interface or start with our default templates. Using the API, you are responsible for SSL certificates, programming and debugging your web integration.

Customizing Your Site

Before you deploy Your CustomerConnect Site
It is suggested that you spend time reviewing this document, Spot configuration screens and customization to your site. Once you have tested all pages, features, email responses and theme customization applied to your CC site you are ready to go live. Testing is key so that your customers are not surprised by default settings or email responses.

Spot Configuration Tool
Available features of CC are configured directly in a Spot configuration tool that is located at Setup > Program Configuration > Company Settings > CustomerConnect > CustomerConnect Profiles. SBS support will create a profile for each of your company brands. Each brand profile may provide your brand different functionality, features and look.

Required Settings of a CustomerConnect Site
The following setting are required prior to the testing and launch of your site. These settings are described in the Spot configuration tool and below in the Configuration section.

Email Features
- Email
  - SMTP Server
  - SMTP Port
  - SMTP Username
  - SMTP Password
  - Use SSL
  - Template Directory
- Email Templates
  - Configure” From Address”, “Subject”, “Body” or “Filename” for each template/process enabled to reply with an email
- Enable Email
  - Enable “Send Customer Email” option at each process option for Account Update, Pickup, Signup etc.

Customer Information
- Account Update
  - Bypass web requests
  - Send Customer Email (requires email configuration)
  - Submitted Message
- Signup
  - Bypass web requests
  - Default Route Name
  - Default Store ID
  - Submitted Message
- Signup > Route
  - Create A/R Account
  - Default Payment Precedence
  - Default Billing Group
Miscellaneous Settings

- Credit Cards
  - Credit Card Profile (Tsyr merchant profile only)
  - Enable Tokens
- General
  - Locality
  - Logo Icon
  - User
  - Workstation
- General > Date Format
  - Date Format
  - Language Tag
  - Phone Task
  - Postal Code Mask
- General > Send Message
  - Recipient Group
  - Recipient User
  - Sender User
- Pickup
  - Bypass Web Requests

Configuration Settings
*Indicates a required setting prior to using your CC site,

Account Update

“Account Update” settings control the Customer Record process features.

*Bypass Web Requests* - When this is enabled, updates will take immediate effect on the customer record. When this is disabled, updates have to be processed through Web Requests.

Send Customer Email - Trigger an email from the API on an information update. Requires Email section configuration.

Show Billing Address - Shows the billing address section.

Show Cash Credit - (CustomerConnect) Shows how much cash credit the customer has available to them.

Show Delivery Address - Shows the delivery address section.

Show Rewards Points - (CustomerConnect) Show how many rewards points the customer has.

Submitted Message - The message that will display on the popup after submitting an information update.

AR Payment

“AR Payment” settings control the Account Receivable process and features.
Send Customer Email - Trigger an email from the API on an A/R payment. Requires Email section configuration.

Cancellation
“Cancelation” settings control Route Cancelation / Vacation requests.

*Bypass Web Requests – When this is enabled, updates will take immediate effect on the customer record. When this is disabled, updates have to be processed through Web Requests.

Menu Synonym – The text to appear in the navigation menu. Defaults to 'Suspend'. Leave blank to remove menu option.

Send Customer Email - Trigger an email from the API on a cancellation request. Requires Email section configuration.

Credit Cards
“Credit Cards” setting control Credit Card token process

*Credit Card Profile – (API) - Enter the name of the credit card profile to use to tokenize credit cards.
*Enable Tokens - (API) - Enable tokenization of credit cards. Requires a valid processor and setup.

Email
“Email” setting control Email process and templates used with customer responses
Customer Email Redirect - This should be left blank for production. This is used for redirecting customer emails to a specific email address for troubleshooting purposes.

*SMTP Server - The mail server address to send emails through.

*SMTP Port - The port for the mail server.

*SMTP Username - The username for the mail server. Leave blank if anonymous.

*SMTP Password - The password for the user to connect to the mail server. Leave blank for anonymous.

*Use SSL - Enable or disable connecting to the mail server with SSL.

Template Directory - The custom directory to look for email templates.

Email Templates

Email templates available for action(s) processed in CC session.

- AR Payment
- Cancellation
- Password Reminder
- Pickup
- Send Message
- Signup

All email templates have the following Settings available

From Address - The from address of the triggered email.
Subject - The from address of the triggered email.
Body - Enter HTML code of email to send. Overrides Filename.
**Filename** - The filename of the email template to use for this type of transaction. This will first check if it exists in the custom template directory, if it does not exist it will check in the default directory. Body must be left blank to use this.

**General Settings**
General setting control many of the optional features a customer may use on the CC interface.

![General Settings](image)

- **Brand Name** – Brand name to display on the left side of the navigation menu. Leave blank to remove.
- **Enable Captcha** – Enable Google Recaptcha forms verification.
- **Enable Two-Way Messaging** – (CustomerConnect) - Enables the two-way messaging functionality through the Messages menu option. You have the option to send a customer a response via the CC template from the customers CRM conversation tab.
- **Gift Cards Menu Enabled** – Display the gift cards menu option on the site.
- **Kiosk Menu Enabled** – Displays Kiosk menu item.
- **Locality** – Select the country locality for this profile.
- **Logo Icon** – Branding icon to display on the furthest left side of the navigation menu. This should be the full data URI. (data:image/png;base64,ENCODETEXT)
- **Route Scheduling** – Allows route pickup and suspension requests.
- **Theme** – Default Bootstrap themes. Custom theme can be used. Requires theme custom url.
  
  You can view the current available themes later in this document or Samples at [http://bootswatch.com/](http://bootswatch.com/).
- **Theme Custom URL** – The full URL to the CSS custom theme. This must be a Bootstrap theme. Themes are available at various online shops at [http://bootstrapbay.com/](http://bootstrapbay.com/) or [https://wrapbootstrap.com](https://wrapbootstrap.com). Advanced Users Theme Creator options are available at [http://getbootstrap.com/customize/](http://getbootstrap.com/customize/)

- **User** – The user associated to all API activity.
- **Workstation** – The workstation associated to all API activity.

**General > Enable Customer Referral**
Customer Referral configures the process used when referral logic is enabled.

![Customer Referral](image)

- **Enable Customer Referral** – Enables the Customer Referral program for CustomerConnect.
**Referral Coupon** – The coupon to display for the referral email or slip.
**Referral Incentives Rate** – This is the return (percentage of actual cash sales of the referred customer) to the referring customer.
**Referral Expiration Period** – Sets the default expiration date (in months after added) for the new customer referral incentive. After this date is reached, the incentive to the referring customer ceases.
**Referring Customer Minimum Rating** - This is the minimum customer rating necessary for a customer to be able to refer another.

**General > Data Formats**

Data Formats provide localization and formatting detail needed to pass and store data

*Date Format* – The date format for server-side dates.
*Language Tag* – The i18n language tag. This is used for the CustomerConnect customer side localization files.
*Phone Mask* – The phone mask to display. US/CA (###) ###-#### or UK ##########
*Postal Code Mask* - The postal code mask for SPOT. ##### for US, ??? #?? for UK or ### ### for CA.

**General > Send Message**

General Message controls how the “Message to Manager” option delivers messages

*Recipient Group* – The group that is the target for messages sent through the web interface. This overrides "Recipient User".
*Recipient User* – The user that is the target for messages sent through the web interface. This can be overridden by "Recipient Group".
*Sender User* - This is the from of the message sent through the web interface. Can be overridden by "Sender Group".
*Sender Group* - This is the from of the message sent through the web interface. Can be overridden by "Sender Group".
Pickup
Pickup controls the Route Pickup functionality

- **Allow Delivery Date Selection** – Show the delivery date selection on the pickup menu.
- **Allow Non-Route Pickup** – Allows customers not on a route to submit a pickup request.
- **Allow Time Selection** – Allow user to specify the hour of the pickup.
- **Bypass Web Requests** – When this is enabled, updates will take immediate effect on the customer record. When this is disabled, updates have to be processed through Web Requests.
- **Menu Synonym** – The text to appear in the navigation menu. Defaults to ‘Pickup’. Leave blank to remove menu option.
- **Minimum Days After Pickup** – (CustomerConnect) The minimum days after the pickup date to allow a delivery date selection. Requires the use of "Allow Delivery Date Selection".
- **Send Customer Email** - Trigger an email from the API on a pickup request. Requires Email section configuration.

Signup
Signup controls the feature use during the customer signup process

- **Bypass Web Requests** – When this is enabled, updates will take immediate effect on the customer record. When this is disabled, updates have to be processed through Web Requests.
- **Default Route Name** – The exact route name to save route signups to when using Bypass Web Requests.
- **Default Store ID** - The default id of the store where the default route exists.
- **Menu Synonym** – The text to appear in the navigation menu. Defaults to ‘Signup’. Leave blank to remove menu option.
- **Send Customer Email** – Trigger an email from the API on a signup. Requires Email section configuration.
- **Submitted Message** - The message that will display on the popup after submitting a signup.

Signup > Counter
Counter configures signup options for Retail/Counter customers
Create AR Account – Automatically create a master A/R account on signup.
Default Payment Precendence – The default payment precedence.
Default Billing Group - The default billing group to be assigned.

Signup > Route
Route signup configures signup options for Retail/Counter customers

Create AR Account – Automatically create a master A/R account on signup.
Default Payment Precendence – The default payment precedence.
Default Billing Group - The default billing group to be assigned.
Integration Options

**SPOT Requirements**
SPOT version 7.0.5018.3 is required to support the latest CC interface. Contact SBS Customer Care to schedule your update.

**Client Side Requirements**
CustomerConnect has been tested with modern web browsers including Chrome, Internet Explorer, Edge, Safari and Mozilla. Not all platforms and browsers have been tested. If you are making customization outside of these settings please test your customizations on all browsers, platforms and device sizes.

**Server Side Requirements**

**SBS Hosted Customer**
You have the option of using SBS supplied templates located on our secure web servers or you can integrate CC with your current web site. If you choose to host pages on your web site an SSL certificate will be required on your site.

**Self-Hosted Customer**
You will need the knowledge, resources and expertise of providing a secure web application to your customers. SBS will not be responsible for the server side infrastructure, configuration and security of your CustomerConnect installation. Your local infrastructure and web server will require a baseline software installation of the following items:

- Server 2012 R2 with current updates
- IIS 8.5
- .Net Framework 4.5
- 1000 MB LAN access to your SPOT production data base from this web server and IIS installation
- SQL server 2012/2014 with current updates
- SSL certificate
- Reliable internet connection
- Hardened firewall in/out bound rules
- Proper configuration of your web server environment
- Patching web server(s) with current and future feature and security vulnerabilities updates

**Theme / Style Management**
CustomerConnect uses standard CSS technology that can be easily managed using “Bootstrap” to assist in customizing the look and feel of your site. A default Spot configuration includes a number of predefined themes. You may choose to create your own theme using Bootstrap options or industry standard CSS configuration (see notes below).

**Custom Themes**
To use a custom theme visit [http://bootswatch.com/help/](http://bootswatch.com/help/) or download a base theme from [https://www.bootstrapcdn.com/bootswatch/](https://www.bootstrapcdn.com/bootswatch/) and create a custom theme. Once you have downloaded or created a compatible CSS theme copy the configuration to your web site and update the “Theme Custom URL” setting in Spot configuration. Reload CC and the new theme will be used with the site and ready for any final tweaks.

**Predefined Themes**
Below you will find examples of the predefined design themes found in theme settings.
Cosmo

Flatly

Sandstone

United