

# ZiiZii Web Ordering 2.3.9

*Walkthrough*

Updated 2015/02/19

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## First-time use

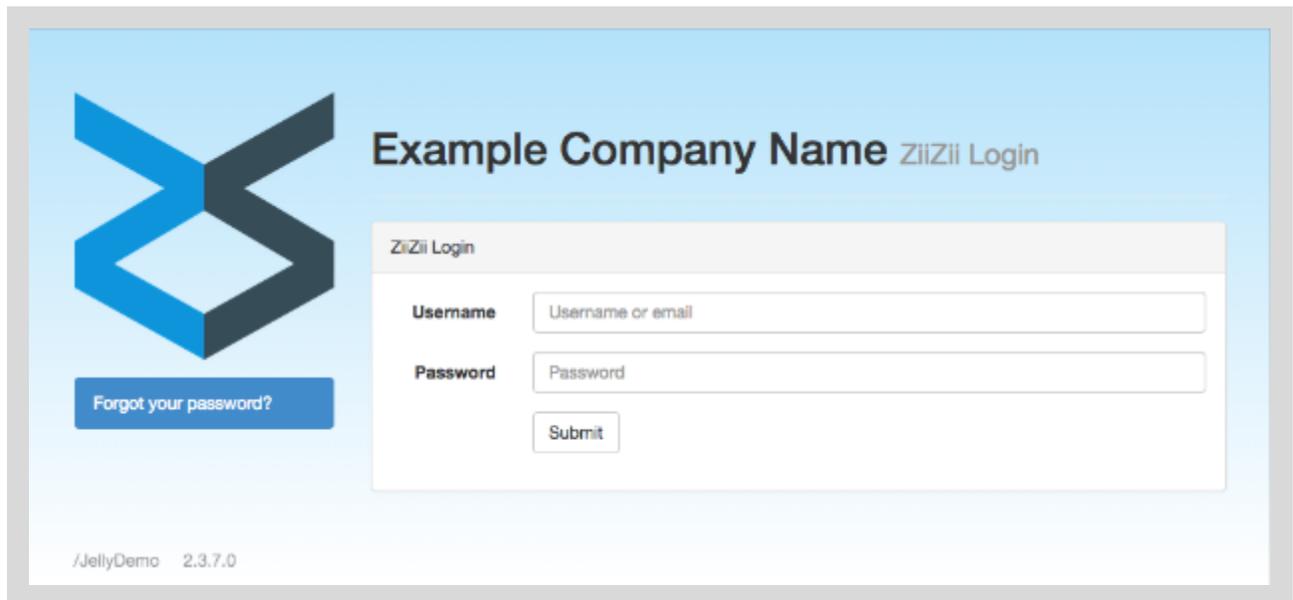
After your user account is created, you will receive an email saying “Welcome to ZiiZii. You will need to [click here](#) to set your password.”

**Check your junk and spam folders** if this email does not appear in your inbox.

When you visit the link, you will be asked to enter and confirm a new password for your account. The password must be at least 8 characters long.

## Login page

After setting your password, access the login page at <http://companyname.ziizii.net/JellyCompanyName>



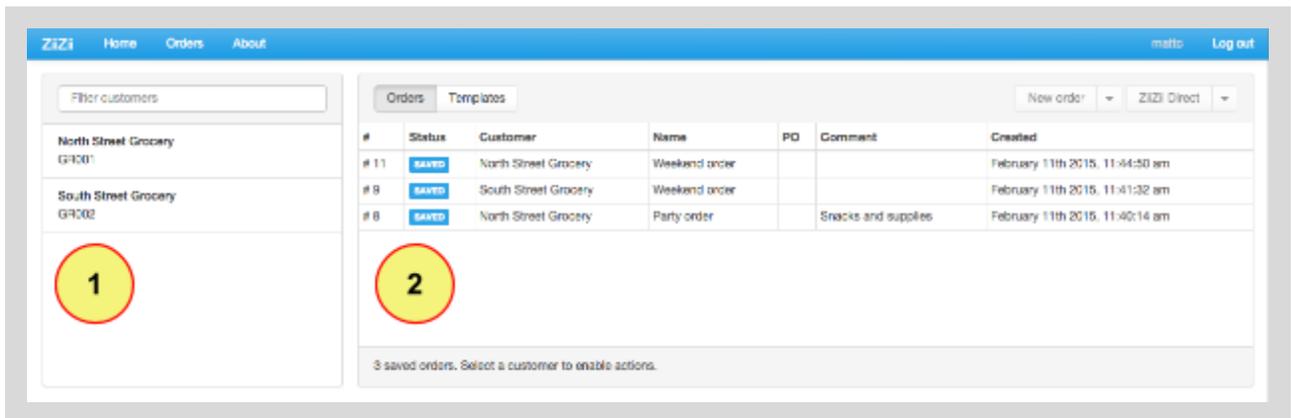
The screenshot displays the ZiiZii Login interface. On the left, there is a stylized logo consisting of two interlocking shapes, one blue and one dark grey. Below the logo is a blue button labeled "Forgot your password?". To the right of the logo, the text "Example Company Name ZiiZii Login" is displayed. The main content area contains a white login form with a grey header "ZiiZii Login". The form has two input fields: "Username" with the placeholder text "Username or email" and "Password" with the placeholder text "Password". Below these fields is a "Submit" button. At the bottom left of the page, the text "/JellyDemo 2.3.7.0" is visible.

If you have forgotten your password, and if your username is an email address, then click “Forgot your password?” and provide your email address. A password reset link will be sent to your inbox.

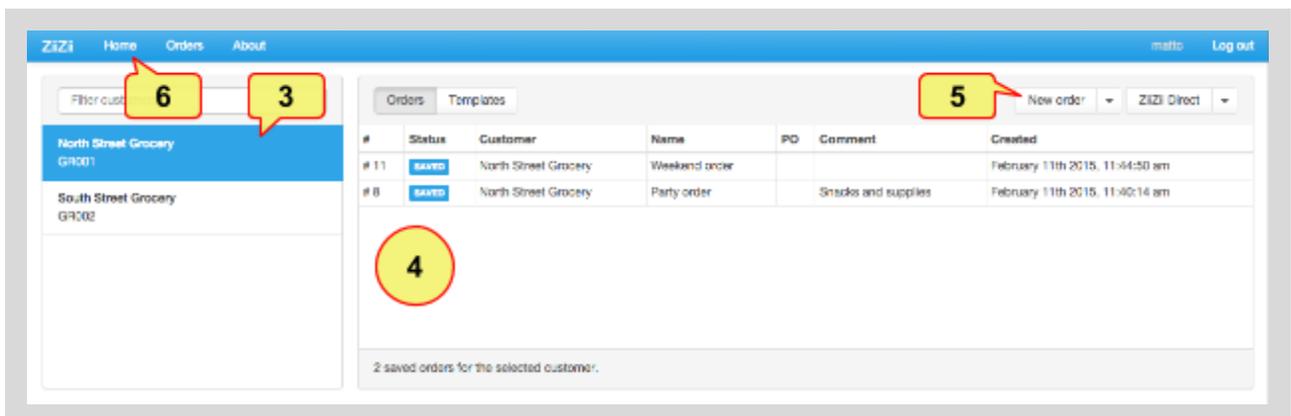
Please contact customer service if you have forgotten your username or cannot retrieve a password reset link.

# Dashboard and customer list

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



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



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

# Creating an order

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

SKU	UPC	Description	Pack	Size	Quantity	Unit	Case Cost	Extended Cost
210002	071610000844	BACKWOODS HONEY	0	0.5 PK	- 1	case	\$38.64	\$38.64
200025	071610000194	BACKWOODS ORIGINAL	0	0.5 PK	- 2	case	\$38.64	\$77.28
250224	070107211157	BLACK & MILD JAZZ WOOD TIP	10	10.5 PK	- 1	case	\$46.68	\$46.68

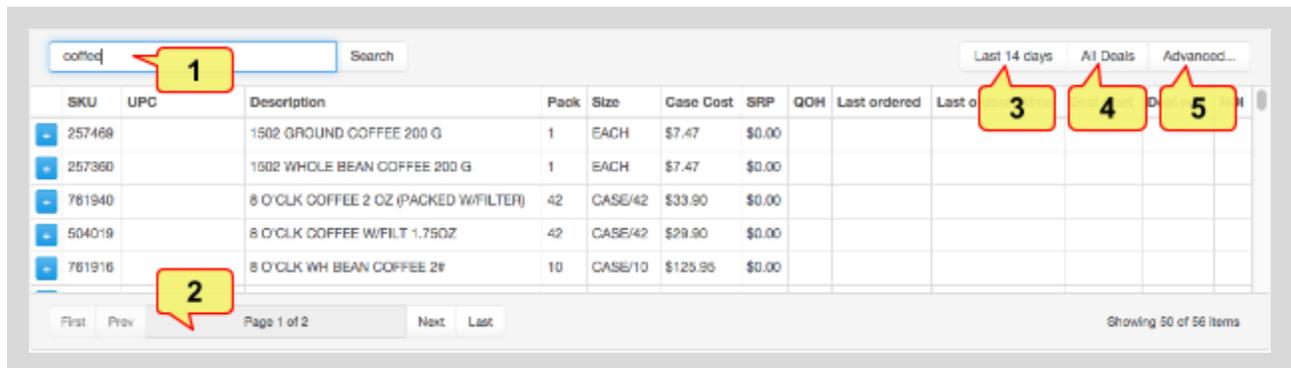
  

SKU	UPC	Description	Pack	Size	Case Cost	RRP	QOH	Last ordered	Last ordered time	Deal start	Deal end	MOI
230726	879660001945	1688 FILTER RED ADVANTRY CIGAR 100 BOX	10	CTN/10	\$19.90	\$0.00						
230836	879660001975	1688 FILTER CHERRY CIGAR 100 BOX	10	CTN/10	\$12.90	\$0.00						
230894	879660001789	1688 FILTER FULL FLAVOR CIGAR 100 BOX	10	CTN/10	\$12.90	\$0.00						
230903	879660001796	1688 FILTER LIGHT CIGAR 100 BOX	10	CTN/10	\$19.90	\$0.00						
230953	879660001782	1688 FILTER MENTHOL CIGAR 100 BOX	10	CTN/10	\$12.90	\$0.00						
230824	879660001995	1688 FILTER VANILLA CIGAR 100 BOX	10	CTN/10	\$19.90	\$0.00						

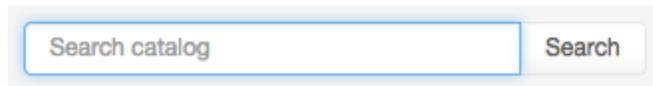
1. General order details and actions appear in the upper left panel. Name, PO, and comment fields will be visible to the wholesaler when the order is sent.
  2. All items added to the order appear in the upper right panel. Here you can adjust quantities, choose selling units, and toggle any available item flags.  
Click to remove an item from the order.
  3. Item categories appear in the lower left panel. Click any category to load its items.
  4. Catalog items and search controls appear in the lower right panel. When the order screen first appears, recently ordered items are loaded automatically in this panel.  
Click to add a catalog item to the order.
- The approximate cost of the order is the sum of the “extended cost” values. Extended cost is calculated as (unit cost × quantity) for each item in the order.
  - **All changes are saved automatically.** You may leave a saved order at any time, and find it on the dashboard when you wish to resume or send it.
  - Click “Send” when ready to submit the order to the wholesaler. You will be asked to confirm.

## Searching for items

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

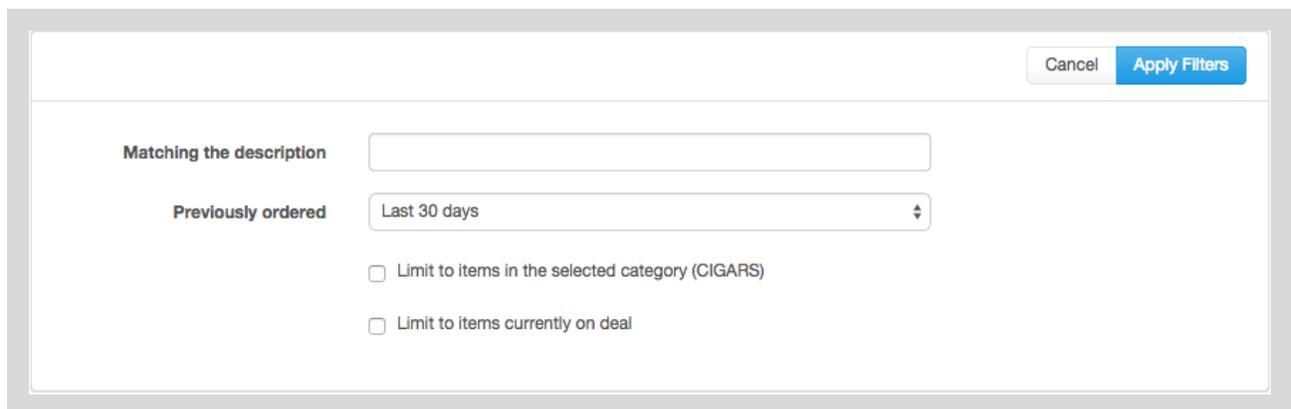


1. You can enter a SKU, UPC, or part of an item description into the “Search catalog” box and click “Search” to see matching items.



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

## Advanced search

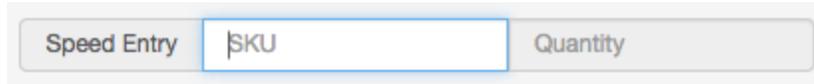


In the advanced search dialog, specify one or more filters and click “Apply Filters” to load results. (Leave the “Matching the description” box blank to disable the description filter.)

## Speed Entry

Find the Speed Entry widget on the order screen.

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



The image shows a Speed Entry widget with three sections: 'Speed Entry', 'SKU', and 'Quantity'. The 'SKU' field is active, indicated by a blue border and a cursor.

Focus will jump to the “Quantity” box. The Speed Entry widget will turn yellow while searching for a matching item. You can enter a quantity immediately, or wait.



The image shows the Speed Entry widget with the 'SKU' field containing '268102' and the 'Quantity' field active, indicated by a yellow border and a cursor.

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



The image shows the Speed Entry widget with the 'SKU' field containing '268102' and the 'Quantity' field containing '4'. The widget has a green border, indicating a match was found.

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

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



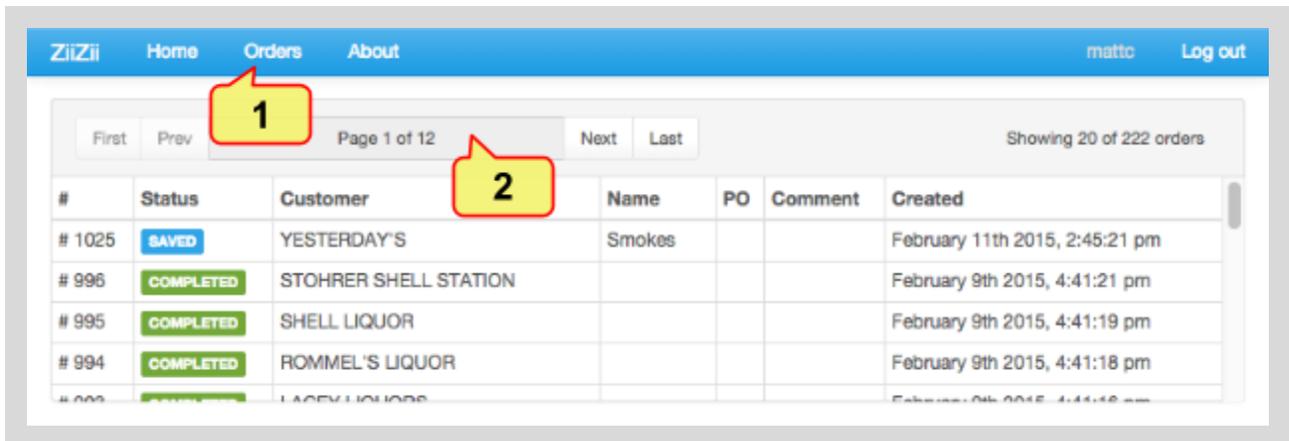
The image shows the Speed Entry widget with the 'SKU' field containing '651546' and the 'Quantity' field active, indicated by a red border and a cursor.

Press *Esc* on your keyboard to reset the widget. Focus will return to the “SKU” box automatically.

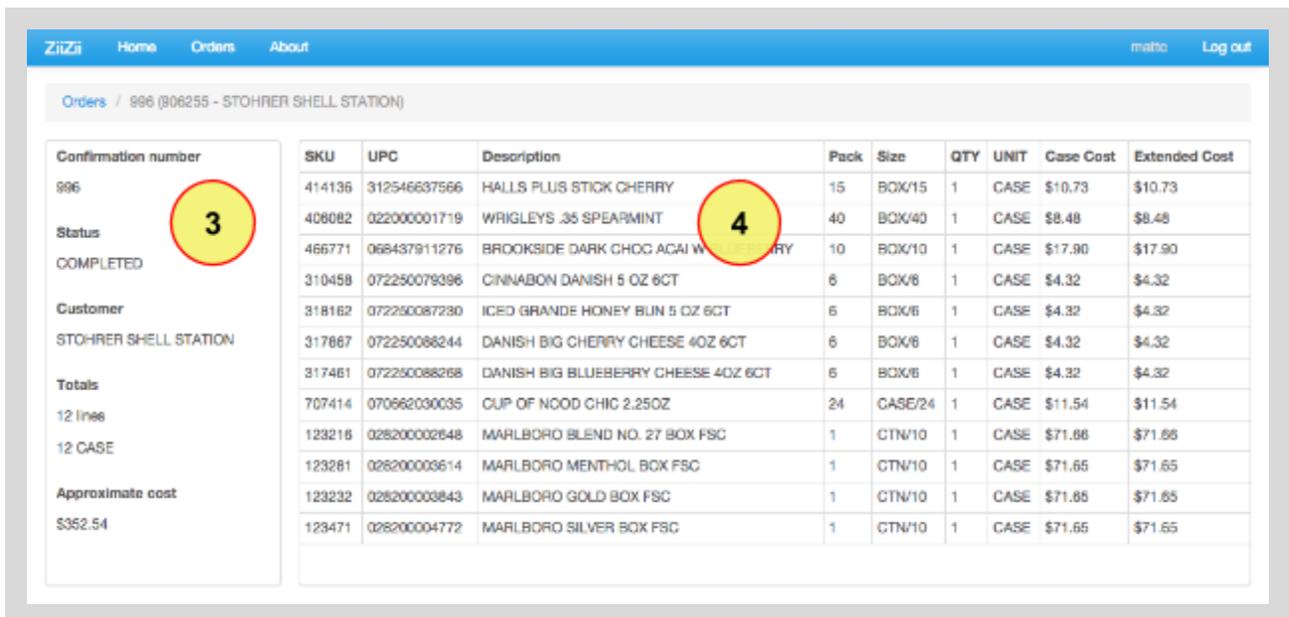
**Speed Entry allows you to work as quickly as you like!** You may enter and submit a quantity while the SKU lookup is still underway, and proceed to enter the next SKU. The item will be added to your order as soon as it is retrieved from the server. If the item is not found, you will be notified in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

Speed Entry lookup failed to find SKU: 2681022

# Reviewing sent orders



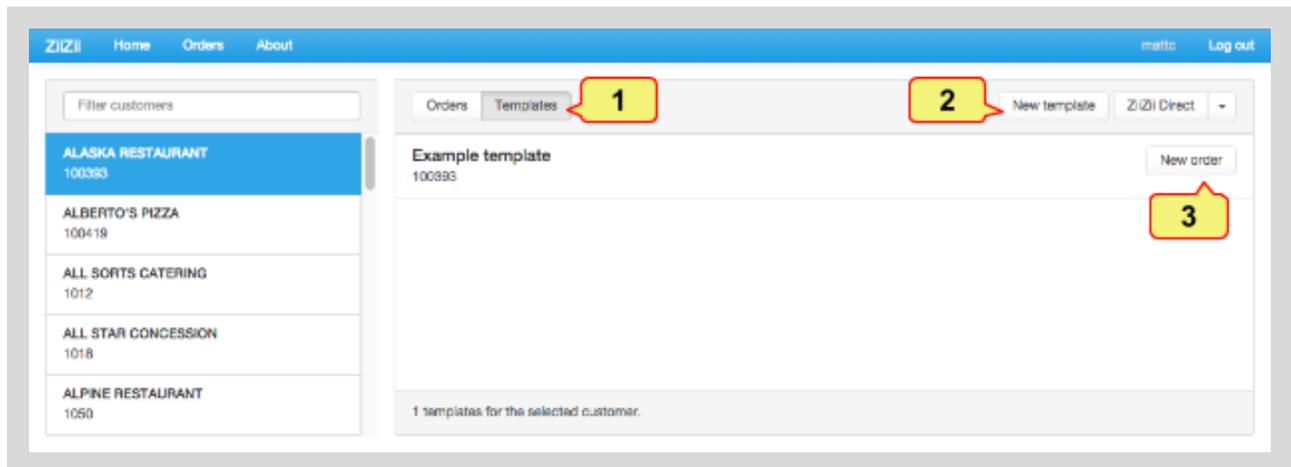
1. Click the “Orders” link to see a full list of saved and sent orders.
2. This list may be partitioned into multiple pages. Click “Page X of Y” to specify a particular page number, and press *Enter* to jump to that page.
  - Click any saved order to open for editing.
  - Click any sent order to review.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



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

# Template orders

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



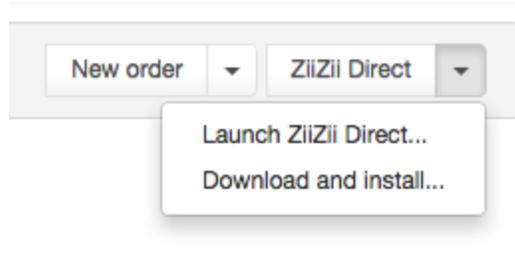
Templates can save you from building the same order repeatedly. Build a template once, and clone it as a new order whenever needed.

1. On the dashboard, click the “Templates” button to see templates for the selected customer. All templates are listed if no customer is selected.
  2. Click “New template” to create a blank template specific to the selected customer, or click any template in the list to open for editing. You will be taken to a screen where you can build the template just as if you were building an order. You should specify a descriptive name for the template.
  3. On the dashboard, click the “New order” button to the right of a template to clone the template as a new order. All items (along with quantities, selling units, and flags) are copied from the template to the new order. You will be taken to a screen where you can edit the new order before sending.
- Updating a template will not update saved orders that were formerly created from the template.

## ZiiZii Direct

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

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



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

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

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

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

# Troubleshooting

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

**If a saved order is missing on your dashboard**, make sure that you have the correct customer selected to see their unsent orders, or deselect the selected customer to see all unsent orders. Check your recently sent orders on the Orders page, as the order may have been sent prematurely.

**If the information on screen is smushed together**, there may be insufficient space for the layout. Try making your web browser full-screen or increase the window size, and then reload the page.

**If the website is otherwise misbehaving**, you may be using an outdated web browser. Visit [browsehappyy.com](http://browsehappyy.com) to find links to the latest versions of all major browsers.

**If you need to contact technical support**, please provide details about your web browser. Visit [aboutmybrowser.com](http://aboutmybrowser.com) and include the link below “Share Your Browser Info” in any emails to technical support.