

Dealer Relay - How to Use

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About Dealer Relay

Dealer Relay is a wholesale order management tool which provides you with a faster and more reliable order experience that fits your B2B clientele.

The left side menu provides you easy access to all stages of the ordering process necessary.

Use this menu to **go through each tab without focusing on a specific buyer**.

If you want to **focus on a particular buyer** and only work on his order process start by clicking on the buyer's name and **use the top menu** to easily navigate between his business page, product catalog, orders and balance.

Before you start working with the system, you must first upload your product catalog. This requires early preparation of three CSV files (or manual creation by the same order):

- Price Levels
- Categories
- Products.

Make sure you upload them according to this order using "Import".

[Read more on pages 4-5 below.](#)

Once you have finished uploading your catalog, what's left is to invite your customers to make their orders via Dealer Relay. You can do this in "My Buyers" page.

[Read more about how to invite buyers on page 6.](#)

On the top right side, you will always find the main action button of each page and next to it, is the menu with additional functions, which you can open by clicking the arrow.

All tables have a REFINE field that provides a search by entering a keyword and table view pages provides you also a filtering option "All".

Notice! Unlike traditional storefronts that ask buyers to pay during the order process Dealer-Relay disconnects the payments from the orders.

This feature requires you to first approve the order before your buyer is required to pay. That's why, in some cases, the buyer may not need to pay until after he received the products, depending on his payment agreement.

However, payments could be done through Dealer Relay if you connect it to a Stripe account, if not, then your buyer will transfer the funds outside the system and manually log it or you'll log it by yourself.

[Read more about payment agreements on page 6.](#)

Create CSV File

A CSV file contains all the information and criteria that characterize price levels, categories and products.

On Import page in Dealer Relay you'll find a table contains instructions and requirements that have to appear in your CSV files.

The table changes according to the "Entity Type" you choose to upload.

The Headers have to be called the same as there, if you miss one, it will be missing from your price level/category/product.

Wherever you see square brackets- [key], [Price Level]- write instead the relevant attributes:

- **[key]** means the attribute name of the product like "Size"
- **[Price Level]** means the price level name you wish to override.

Please **use the sample** we made to help you make your CSV file. Click on "Download sample CSV" on Import page.

Import

Why do you need Import?

- when you first start using Dealer Relay and you want to upload a large number of categories, price levels, and products
- If you need to edit a large set of values.

Replace Existing

Replace Existing marked- all existing fields will be replaced with new ones.

Replace Existing not marked- if you want to upload an existing product, for example, with a different attribute, it will show you that there are a conflicting values and it won't change the existing values with new ones.

If you wish to edit some attributes, erase the price levels/categories/products that needs to be changed, edit them in the CSV file and upload.

Notice- if you upload a product with missing values, the empty values will be deleted.

Import your entities according to this order:

1. price levels
2. categories
3. products.

Import CSV files

1. Choose "Entity Type"
2. Click on "Upload CSV" on the upper right corner
3. Choose the CSV from your computer and click "Open"
4. When the bar is 100% full click "Save"

Invite Buyers

1. Go to “My Buyers” page.
2. Click on “Invite Buyer”
3. Enter your buyer’s details:
 - Email address
 - Nickname- private field, only visible to you.
 - Tax ID
 - Country
 - Notes- anything you’d like to write about this buyer
 - Tags- press “Enter” to differentiate between tags.
 - Price level- set the client type
 - Max Allowed Debt- what maximum amount of money your client may owe you
 - Default Payment Terms- you have three options:
 - payment in advance
 - Net- means, how many days **after receiving the product** your customer will send you payment.
Example: net + 30 days, means that your customer can pay you 30 days after receiving his order.
 - End of month- **the end of the month your buyer received his order + the amount of days afterwards.**
Example: end of month + 30 means that if your customer received his order on March 1st, he’ll pay you on April 30.
4. Click “Invite”

Your customer was added to your buyers list and received an invitation email from you to join Dealer Relay.

You don’t have to wait for him to complete the registration, simply start your process and the minute he joins he’ll see all you’ve done up to that point.

Price Levels

Dealer Relay was established on the assumption that each customer is different from the other, a situation that requires building a different price level for each one. Therefore, in our case, the price level is a part of the system and not an add-on, and our goal is to make it comfortable and easy to distinguish between them.

Terminology

- **Price Level**- a specific price list **assigned to a class of buyers**.
- **Base Price**- a price that is a reference point for all the different price levels **assigned to each product**.
- **Price Modifier**- a value used to modify the **Base Price** to the desired price for each class of buyers. **Assigned to a price level**.

A price modifier type can either be percentage (%), difference (+), absolute price (\$) or hidden:

- **Percentage** - Will multiply the base price: For X% the calculation is $X * (\text{Base Price}) / 100$
 - **Difference** - Will add to the base price: For X+ the calculation is $X + (\text{Base Price})$
 - **Absolute** - Will replace the base price: For X\$ the calculation is X
 - **Hidden** - The product will be unavailable
- **Price Modifier Override**- a price modifier that can be assigned to a product or a category used to override the **Price Modifier** assigned to the price level, allowing you to have granular control over product prices.

If you assign a price modifier override to a category each product in that category will be modified by it instead of the price level's price modifier

If you assign a price modifier override directly to a product then the base price will be modified by it instead of the category's or price level's price modifier.

See example: <https://www.dealer-relay.com/blog/managing-price-in-dealer-relay/>

Edit Seller Profile

1. Go to Profile page
2. Click on your name
3. Edit your name- this name will be seen to your customers.
4. Click "Save"

Edit

- Insert or change your logo- click anywhere inside the blue rectangle. If you wish to remove it then click "Remove Image".
- Name
- Tax ID
- Description
- Link to website
- Country
- Currency
- Default Language

Click "**Save**" when you're done.

New Address

- Location Name
- Address line 1
- Address line 2 - second address
- City
- Country
- State (only for US)
- ZIP code
- Phone

Mark "**Billing Default**" if you want this address to appear on your invoices.

Mark "**Order Default**" if you wish to receive your orders to this address.

Click "**Create**" when you're done.

Profile Menu

- Enable/Disable push notifications
- Subscribe to newsletter
- Restore all help messages

Invite User

If you're using a paid version of Dealer Relay that allows more than one user, click on **"Invite User"** and enter his/her email address.

Create Category

A category is a group that consolidates products of the same type or similar characteristics.

Defining a category allows you to override a price level and create a unique price list only for this product group.

Once you assign the product to this category, it will receive the price level you have defined for the category.

1. Go to “categories” page
2. Click “New category”
3. Choose name for the category
4. click on *“Override” on each price level to change it’s value
5. Click “Create” when you’re done

[Read about Price Modifier Override” on page 7 - “Price Levels”.](#)

Delete Category

1. Click on the category you wish to delete
2. Click on the arrow beside the “Save” button
3. “Remove”
4. “Ok”

Add New Product

1. Go to “Products” page
2. Click “New Product”
3. Fill all product’s criteria necessary
 - SKU
 - Name
 - Category
 - Base Price- read about “Base Price” on page 4 - “Price Levels”.
 - Edit Price Levels by using Price Modifier Override
 - MAP price
 - MSRP price
 - Brand
 - Barcode
 - Link
 - Thumbnail- upload your product’s picture
 - Description
 - Color
 - Attributes
4. When you’re done click “Create”

Delete Product

1. Click on the product’s SKU
2. Click on the arrow beside the “Save” button
3. “Remove”

Refine products according to their SKU, name, brand, description and category.

Manage Orders

Order Status Terminology

New- new order is waiting for you to start process it.

Actions:

- **Approve**
- **Modify-** you and your client can make changes in the order
- **Backorder-** A new order can be turned into Backorder in case the seller can't process the order for a particular reason. Simply click "Backorder".
- **Cancel-** you and your client can cancel the order
- **Clone-** duplicate the order if needed
- **Download PDF**

Draft- intended for a situation where the buyer created a new order but do not want, for certain reasons, the you to start working on it.

You and your buyer can modify it, but you can't start working on this order until after your buyer marks the order as "New".

Actions:

- **Modify-** it is recommended that only the buyer will make changes in the order.
- **New-** when the buyer is done making the order he should mark it as "New"
- **Cancel-** your client can cancel the order
- **Clone-** duplicate the order if needed
- **Download PDF**

Processing- an order in process.

Actions:

- **Ship**
- **Modify-** At this point only you can make changes in the order.
- **Backorder-** you can split this order or mark the entire order as Backorder.
 1. Click "Backorder"
 2. Reduce the number of the products
 3. "Backorder"
 4. The products in the cart create a new order which is the "Backorder".
- **Cancel-** cancel the order if necessary

- **Log Payment**- if you receive a payment outside Dealer Relay than log it here.
- **Clone**- duplicate the order if needed.
- **Download PDF**

Outstanding- After you approve an order, if it causes deviation in existing debts or your buyer's payment is late the order will get automatically an Outstanding status. The moment you receive payment for this order or the buyer will settle his debt it will turn automatically into "Processing".

Backorder- is a mid level allows you to split the order and handle parts of it if you can't supply the products in the order for some reason.

Awaiting payment- mid level appears when your client's payment term is "In advance", after he placed a "New" order and before you start processing it. It is recommended to mark the order as "Processing" after you receive the payment.

Shipped- an order that is shipped to the client

Ready- an order that is ready in case your client chose to peak it up on his own.

Delivered- mark the order as "Delivered" after your client receives it or ask your client to mark it. Click on "Approve Delivery".

Cancel Pending- this status means that your client canceled an order after it was shipped and is waiting for your approval. At this point you can charge him for restocking fee.

Canceled- a canceled order.

watch order details by clicking on its number, then click on "Approve" to edit it or go straight to the edit page by clicking on "Approve" on the main orders page.

Visit your client's page from any screen by clicking on his name.

Use **Refine** to find orders according to the products they contain, order number and buyers name.

Before finally approving an order you can change your buyer's payment terms, give him a discount, add tax if needed and shipping costs.

On order page on your right you have a **chat**, it is recommended for you to **use it for all the interactions regarding the order, it will minimize the chance for mistakes and help you better understand your order history later.**

On the ship page we can edit the shipment date, add tracking number, pick up information and write notes, for example, estimated delivery.

You can edit the discount you gave him earlier, the tax and the shipping costs.

When you're done click on "**Ship**".

It is recommended for you to ask your buyer to mark the order as "Delivered" after he receives it by clicking on "**Approve Delivery**".