

This document describes our Standard, Premium and Enhanced services. While all listed services are available, you may not need them all. Based on your subscription rights, our digital support team will provide the necessary services as needed. If you require additional support, our Enhanced service team can assist.

TECHNICAL SETUP & ONBOARDING

Our digital support team will lay the technical foundation needed to setup and configure your W3 All-in-one eBusiness Platform. This starts with collecting all the necessary information needed to optimize your W3 account (hereinafter referred to as the 'website').

This includes the W3 CMS, W3 Marketing, W3 Sales, W3 eCommerce, W3 Client Services and W3 Fulfillment.

Standard Services

- **W3 Account Setup**
Our digital support team will capture your business information — location, URL, credentials, etc.— to build your website profile.
- **Cname / Subdomain Setup**
Our digital support team will work with you to setup and configure your Cname / Subdomain to host your website using your new URL property (Ex: store.yoursite.com).
- **SSL Certificate Setup**
Our digital support team will work with you to setup, maintain and assign your new website subdomain with an SSL certificate.
- **XML / API Supplier Connection Setup**
Our digital support team will work with you to setup and connect your website with your preferred suppliers.
- **Email Technical Setup**
Our digital support team will work with you to setup and configure your website email settings using your SMTP credentials.
- **Supplier Price File Download (sFTP)**
Our digital support team will work with you to setup, maintain & download your connected supplier price file(s). These price files will be automatically imported into your web portal to ensure pricing and product accuracy.
- **Robots.txt File Installation**
Our digital support team will create, manage and maintain your robots.txt file and save it on your new URL property.
- **XML Sitemap Creation**
Our digital support team create, manage and maintain your XML sitemap and save it on your new URL property.
- **Terms and Conditions Setup**
Our digital support team will work with you to setup and configure your Terms and Conditions statement. A default document has been added to your website as a guide. It is your responsibility to verify and update.

- **Privacy Policy Setup**
Our digital support team will work with you to add your Privacy Policy statement. A default document has been added to your website as a guide. It is your responsibility to verify and update.
- **Primary Account Administrator Setup**
Our digital support team will work with you to setup and configure your primary account administrator. This account holder will have access to manage, assign and distribute internal responsibilities to selected back-office users.

Premium Services

- **Taxation Business Rules Setup**
Our digital support team will work with you to setup and configure your taxation business rules. If you wish to connect a taxation lookup service, speak to our Enhanced service team for options.
- **Online Payment Processor Setup**
Our digital support team will work with you to setup and configure your Paypal or Stripe online payment servers. Other online payment options are available, speak to our Enhanced service team for options.
- **Shipping Rate Table Setup**
Our digital support team will work with you to setup and configure your Shipping Rate table for use within your web portal to calculate shipping rates for online orders. If you wish to connect an online lookup shipping service calculator or make custom changes, speak to our Enhanced service team for options.

Enhanced Services

- **Subscriptions Limits & Licenses**
All W3 services come with our standard subscription limits and licenses as outlined in your subscription service level agreement. If you need to increase any subscription limits, you can do so by logging into your account and adding the necessary limits. This applies to sales reps, back-office users, page views, leads, data storage, contacts (CRM), leads, featured products, pricing, email sends, campaign scheduling, social ad postings and others.
- **Training & Support**
Based on your service subscription, training and support services are provided by your W3 Authorized Agency Partner. You will need to work with a W3 Authorized Agency Partner to obtain a minimal level of training and support services.

W3 CMS (Content catalog & navigation)

The W3 content management system (CMS) is today's most powerful CMS platform because of its self-maintaining vendor branded plug-in catalogs. This feature empowers authorized partners with the ability to inherit a self-maintaining SEO optimized content catalog from selected vendors that comes private-labeled and ready to use within your W3 subscription. Through minimal efforts and with full customization capabilities, the W3 CMS is the fastest, easiest and most cost-effective way to inherit vendor specific content without allocating any resources.

Standard Services

- Vendor Branded Plugin Content
You'll inherit the basic features with your vendor-branded plugin content.

Enhanced Services

- Custom Content Creation
All content can be customized and edited to meet the exact requirements of your business. Plus, you can expand and add your own content.

W3 MARKETING (Email, SEO, social media & ads)

The W3 Marketing App is an all-inclusive marketing platform that provides email marketing services, SEO management services, social media connectors and website marketing features. This App empowers you with the ability to inherit vendor branded marketing collateral that makes it easy to promote, market and drive new traffic to your website.

Standard Services

- Email Marketing Manager
You'll gain access to a built-in email marketing solution that is both CASL and CANSPAN compliant. With our vendor branded CMS plugins, you'll inherit ready-to-send vendor specific email campaigns that can be schedule and sent with ease.
- CASL / CANSPAN Compliance Manager
You'll gain access to a built-in CASL / CANSPAN compliance manager where you can manage your compliance responsibilities.
- SEO Management
You'll gain access to a built-in SEO management solution where you can manage your SEO keywords, title, description, meta tags and webpage content.
- Social Media Connectors
You'll gain access to a built-in social media icon connector where you can manage and link your social media accounts.
- Website Marketing Features
You'll gain access to a built-in storefront marketing solution where you can manage featured items, promotions, banners, coupons, news, gallery, blogs, product reviews and more.

Premium Services

- Email Marketing Manager
Based on your subscription level, all your email marketing needs will be scheduled and managed on your behalf by your W3 authorized agency partner.
- CASL / CANSPAN Compliance Manager
Based on your subscription level, your W3 authorized agency partner will setup, manage and monitor your responsibilities.
- SEO Management
Based on your subscription level, all your SEO responsibilities will be managed by your W3 authorized agency partner.
- Social Media Connectors
Based on your subscription level, all your Social Media responsibilities will be managed by your W3 authorized agency partner.
- Website Marketing Features
Based on your subscription level, all your website marketing features will be managed by your W3 authorized agency partner.

Enhanced Services

- Training & Support
Based on your service subscription, training and support services are provided by your W3 Authorized Agency Partner. You will need to work with a W3 Authorized Agency Partner to obtain a minimal level of training and support services.

W3 SALES (CRM, CPQ, quoting and sales pipeline)

The W3 Sales App is an all-in-one CRM sales solution that leverages leads from marketing and links them to their assigned back-office sales account for configure, price and quote activities. With a fully integrated CRM and sales pipeline system, turning leads into prospects and prospects into customers is quick and easy.

Standard Services

- W3 CRM
You'll gain access to a built-in CRM module that offers 20+ CRM features to manage, nurture and grow your business with ease.

With features like:

- ✓ Business account management
- ✓ Contact account management (multiple contacts)
 - Unique log-in & password
 - Payment & shipping methods
 - Unique bill-to & ship-to address
 - CASL / CANSPAN compliant
 - Purchase approval rights
 - Access permissions and rights
 - Opportunities
- ✓ Multiple bill-to & ship-to support
- ✓ Purchase approval system (PAS)

- ✓ Custom & private catalogs
- ✓ Standard & custom pricing tables
- ✓ Dynamic pricing
- ✓ Contract pricing (Enhanced service)
- ✓ Request for quote (RFQ) rights
- ✓ Order rights and transaction status
- ✓ Help desk (Enhanced service)
- ✓ Asset management (Enhanced service)
- ✓ Sales pipeline
- ✓ Showcase list
- ✓ Real-time inventory availability rights
- ✓ Customer groups
- ✓ Enable product review rights
- ✓ Employee Management (B/O access)
 - Role Based Access Control (RBAC)
 - Sales representative management (SRM)
 - Teams (Sales rep groups)
- W3 CPQ - Configure, Price & Quote
You'll gain access to a built-in CPQ module that makes it easy to accurately generate and share quotes. With real-time inventory, pricing and a single click quote importer, generating, sharing and turning quotes into orders is quick and easy.

With features like:

- ✓ Supplier & vendor quote importers
- ✓ Merge quotes
- ✓ Import a work list
- ✓ Import pricing
- ✓ Markup / margin calculator
- ✓ Add custom line items
- ✓ Search & add items
- ✓ Price check (Amazon, CDW, Insight, Newegg & more)
- ✓ Notes
- ✓ Supplier XML price & availability lookup
- ✓ Supplier selector
- ✓ Batch order
- ✓ Lock cost price (supplier pricing over-ride)
- ✓ Taxes & charges
- ✓ Environmental fees (EHF)
- ✓ Shipping & handling fees
- ✓ File attachments (public and private)
- ✓ Reminder notices
- ✓ Comments
- ✓ Over-ride terms (payment, shipping & general)
- ✓ Quote log
- ✓ Template selector (with categories)
- ✓ Clone, save, edit, merge
- ✓ Quote to order
- W3 Sales Pipeline & Opportunity Management
You'll gain access to a built-in Sales Pipeline tool to help manage and track where your prospects are in your sales cycle.

With customizable stages and features like:

- ✓ Sales funnel stages
 1. Awareness
 2. Interest

3. Evaluation
 4. Engagement
 5. Purchase
- ✓ Features
 - Title
 - Existing customer or lead
 - Sales rep or sales team assignment
 - Status (Open, lost, won, inactive)
 - Estimated close date
 - Probability (%)
 - Amount (\$)
 - Description / Notes
 - Linked transaction

Enhanced Services

- Sales Commissions
If you require automated sales commission tracking, ask your W3 Authorized Agency Partner for more information.
- Training & Support
Based on your service subscription, training and support services are provided by your W3 Authorized Agency Partner. You will need to work with a W3 Authorized Agency Partner to obtain a minimal level of training and support services.

W3 eCOMMERCE (Shopping cart & plug-in catalogs)

The W3 eCommerce App is the only SEO optimized shopping cart solution that comes with the ability to connect as many self-maintaining vendor plug-in catalogs as needed. With full integration with your CRM and a lead-to-cash eBusiness workflow system; streamlining, automating and simplifying your eCommerce responsibilities is easy.

Standard Services

- Shopping Cart
You'll gain access to a built-in shopping cart solution
- Storefront Access
 - ✓ Private B2B (with custom catalog)
 - ✓ Public B2C (with guest pricing)
 - ✓ Public B2C (without pricing & RFQ)
- My Catalog
 - ✓ Add Products, Services, Bundles & System Builder
 - ✓ Manufacturer
 - ✓ Categories
 - ✓ Shipping Period
 - ✓ Item Status
 - ✓ Import
- Storefront Marketing
 - ✓ Featured products
 - ✓ Banners
 - ✓ Promotions, coupons, free shipping

- Product SEO
 - ✓ Featured products
- Other Features
 - ✓ Co-branded & client-branded storefronts
 - ✓ Product list and/or gallery view
 - ✓ Product search filters
 - ✓ Side-by-side product comparison
 - ✓ Detailed product information
 - ✓ Upsell, cross-sell & supported accessories
 - ✓ Social media sharing
 - ✓ Add to favorites
 - ✓ Product reviews
 - ✓ Real-time inventory availability
 - ✓ Add-to-cart
 - ✓ Request-for-quote (RFQ)
 - ✓ Budgetary quote request
 - ✓ Secure checkout
 - ✓ PCI payment gateway
 - ✓ Email transaction notifications

Enhanced Services

- Training & Support

Based on your service subscription, training and support services are provided by your W3 Authorized Agency Partner. You will need to work with a W3 Authorized Agency Partner to obtain a minimal level of training and support services.

W3 Client Services (My Account)

The W3 Client Service App is today's most advanced customer service dashboard that keeps everything customer related tied together using a single login. From transactional activities to post service support, everything customer related is available 24/7 at the click of a mouse.

Standard Services

- Transaction level features
 - ✓ Secure client login portal
 - ✓ SSL certificate
 - ✓ Order status updates
 - ✓ Quote status updates
 - ✓ Shipment tracking
 - ✓ Returns (RMA's)
 - ✓ Payments & credits
 - ✓ Reporting
- Service level features
 - ✓ Live chat
 - ✓ Purchase approval system (PAS)
 - ✓ Contact management (with administration rights)
 - ✓ Quick order entry
 - ✓ Custom catalogs
 - ✓ Client branded storefront
 - ✓ Custom terms and conditions

Premium Services

- Service level features

Based on your service subscription, you may have the following features:

 - ✓ Help desk and ticketing system
 - ✓ Asset management (with reminder notices)

Enhanced Services

- Client-side Punchout Options

If you need to enable a client with a custom specific punchout solution, ask your W3 Authorized Agency Partner for more information.
- Contract Pricing

If you need to enable a client with contract pricing (education, government or other), ask your W3 Authorized Agency Partner for more information.
- Big Bid Pricing

If you need to enable a client with Big Bid pricing rules with back-office management features, ask your W3 Authorized Agency Partner for more information.
- Recurring Invoicing

If you need to enable recurring invoicing services, ask your W3 Authorized Agency Partner for more information.
- Cloud Billing & Invoicing

If you need to enable cloud billing and invoicing services, ask your W3 Authorized Agency Partner for more information
- Training & Support

Based on your service subscription, training and support services are provided by your W3 Authorized Agency Partner. You will need to work with a W3 Authorized Agency Partner to obtain a minimal level of training and support services.

W3 FULFILLMENT (order workflow & financial management)

The W3 Fulfillment module is an integrated order fulfillment and financial workflow system that simplifies your operational responsibilities. From client and order verification, to payment, shipment and procurement management; streamlining, automating and improving your fulfillment responsibilities are easy.

Standard Services

- Streamlined workflow
 - ✓ Client verification
 - ✓ Order verification
 - ✓ Shipping master
 - ✓ Shipping details
 - ✓ Prepare purchase orders
 - ✓ Generate & send PO's to suppliers
 - ✓ Batch PO requests
 - ✓ Advanced shipment notifications (ASN)

Enhanced Services

- Advanced workflow
 - ✓ Invoice management
 - ✓ Payment management
 - ✓ Returns management (RMA)
 - ✓ Credits and returns
 - ✓ Special bid / big bid procurement
 - ✓ Help desk
 - ✓ Sales commissions
 - ✓ Asset management
 - ✓ Contracts
 - ✓ Cloud subscription management
 - ✓ Cloud billing & invoicing
 - ✓ Metered billing & invoicing
 - ✓ Managed print billing & invoicing
 - ✓ ETA management
- Training & Support

Based on your service subscription, training and support services are provided by your W3 Authorized Agency Partner. You will need to work with a W3 Authorized Agency Partner to obtain a minimal level of training and support services.

ADD-ONS (Custom workflow, integration & add-on apps)

Enhanced Services

- Add-ons

The W3 eBusiness platform is fully customizable and integrates with anything. Speak with your W3 Authorized Agency Partner to discuss your needs.

CUSTOM LOOK-&FEEL

Enhanced Services

Having a professionally designed and matching business presence may be an important feature that you require. If so, speak to our digital support team about optimizing the look-&-feel of your website.

DIGITAL ROADMAP

Enhanced Services

- Digital Roadmap Planning

A digital roadmap is a tool that helps a business navigate and follow a structured deployment strategy by knowing what to expect and when. During a digital transformation journey, this document helps avoid unforeseen expenses and delays. Our team of digital specialist can provide a customized roadmap that meets your goals and objectives.

SERVICE AND PERFORMANCE REPORTING

Premium Services

- Technology dashboard (login & password required)

You will receive access to the W3 back-office dashboard where you can manage and monitor your website traffic.

TRAINING & SUPPORT

Based on your service subscription, training and support services are provided by your W3 Authorized Agency Partner as follows:

Standard Services

- W3 Back Office Support Ticketing System

Via your W3 Back Office, you'll have access to open, manage and submit support tickets 24/7.

Premium Services

- W3 Authorized Agency Partner

Included with your subscription, your W3 authorized agency partner will provide an adequate level of training and support based on your subscription level.

Enhanced Services

- W3 Authorized Agency Partner

As a fully customizable solution and service partner, your W3 Authorized Agency Partner can provide a suitable training and support package to meet your needs.