As a Retailer, Eagle Gift and List Registry gives you the tools to manage and promote this unique online service to your local customers and limitless others across the globe.

In this course we will explore both the Users tab [pause] and the Registry tab.

We will review how to Import a List from your Eagle system into a Registry or Project, [pause] How to Record Purchases online [pause] and within Point of Sale.

When you, the Retailer, log into your Gift and List Registry site as an Administrator you will see the four tabs located here [pause].

These contain the same options shown below in these four boxes. Clicking either will navigate to the same locations.

The Users tab drop down list provides links to 'Search' for Users, to 'Add a Guest Account' and to 'Add an Employee Account'.

Normally Registrants would create their own User name and Password when they create a project or wish list.

In the event that you need to perform this function for them, choose 'Add Guest Account'.

Fill in all of the required 'User Information'.

In the 'Eagle Account' section you can enter their Customer Account number or search for it using the looking glass icon. If they are not an Account Receivable customer, leave this section blank.

Check this box to pass the data back to the Contacts tab in MCR.

Enter and Verify their temporary Password. They can change it after logging in.

Now press 'Save' to add their account.

An email will be sent to the address provided.

If you chose to 'Add user to Names Tab in Eagle' you will see the information displayed in the Contacts Tab in Customer Maintenance.

When they log in they will be provided an opportunity to change their password and enter any missing data such as Address or Zipcode.

To add one of your employees choose the option, 'Add Employee Account'.

There are two areas of information to fill out, 'Details' and 'Security and Options'.

Enter the Employees 'Username' and other relevant data.

Create and Verify their password or leave this field blank to have a password automatically generated.

If you use Salespersons in Customer Maintenance you can link that field here. Use the looking glass to find the appropriate code. You can also elect to display only those customers related to this code when the employee is logged in.

Enter the 'Default Store' and an 'Expiry Date' if needed.

You must include a phone number and an email address or you will be notified to 'Please fill out the form completely'.

The Security and Options form provides several levels of 'User Access'.

Registry Configuration, [pause] User Administration for Employee Accounts and for Customer Accounts, [pause] and the ability to Manage Customer Registries.

Most employees involved in maintaining registries would have access to the last two options here [pause] and only full administrators would have access to the others.

Use the 'Search' link to look for a list of current Employee Accounts.

From this screen you can 'Edit' [pause], change the 'Password' [pause] or 'Delete' an account.

Click the ‘Detail’ button to see a summary of their current settings.

You can click the ‘Administration’ Link or the Registry Tab above. Both will take you to the same page which is divided into three sections: Registries, [pause] Projects [pause] and Utilities.

The Registries section allows you to ‘List’ all of the available Gift Lists and Projects currently found on your site.

You can also more narrowly define this list by entering Search criteria in the text box, here.

You can search by ‘Description’ or ‘Registrant Name’ or ‘Registry ID’.

The ‘Advanced Search’ permits you to set parameters for ‘Start Dates’, ‘End Dates’ and the ‘List Type’.

Click ‘Create Registry’ to begin a list or project for an existing User.

Enter the User Name here [pause] or search using the looking glass icon.

Select the ‘Type’ of List [pause] we will use a Wishlist in this example [pause]and click ‘Go’.

Add a detailed ‘Description’.

Some types, such as Wedding and Housewarming registries will ask for an event Date.

Set the ‘Access’ to ‘Public’ and everyone will have access to this registry.

Choose ‘Shared’ and only those with the designated Secret Word will have access.

Or opt for a ‘Private’ setting to grant only the assigned user the ability to access this registry.

Use the ‘Address on-file’ or add an alternate.

The ‘Projects’ section of the Registry tab functions in a similar way.

You can ‘List’ all current projects, search for them by ‘Description’ or ‘Project ID’ or Create a new one.

From the List your choices include ‘Manage’, ‘Edit’ or ‘Delete’.

Manage gives you the chance to ‘Edit Quantities’, and ‘Delete’ items from the Project

From the link here, you can ‘Add items to this project.

You can also ‘Export’ the list or send it to ‘Print’.

Projects allow for a longer ‘Extended Description’ and provide a means for you to include an image. For example if this were a Deck Project you could display a picture of the finished product.

Check the ‘Project Total’ box to ‘Show project total (retail price)’. With this option the Consumer and/or Registrant will know how much the total cost is for all of the listed materials.

The Instructions section gives you the ability to link to one of your Custom Pages. For example, you could create a page with step by step instructions and link it directly to your project.

Select your ‘Publish’ option to ‘Display in carousel’ if you would like the Image and the link to be part of the landing page scrolling images.

Retailers can opt to ‘Display in registry list/project list’ so that your project is available to both your Registrants and Consumers.

The ‘Utilities’ section gives you a tool to ‘Purge Registries’ based on their Start and End Dates.

You can also limit them by ‘Type’.

The ‘Registry Item Report’ produces a list of the SKUs contained on your current Registries.

You can set the output parameters by Start and End Dates, Registry ID and Registry Type.

Checking the box marked ‘Aggregate Quantity’ will add like SKUS into one line with a combined Quantity total.

Retailers and Registrants have the ability to import a scanned list into their Registry or Project.

A ‘Blank’ or ‘O’ for Ordering List Types are the only ones that can be imported.

Be sure to watch the Training on Demand course titled ‘Creating Item Lists’ for more information on List Types.

Locate your Registry or Project and chose the Manage icon.

Now, select ‘Add items to this project’.

Choose, ‘Import Items from Eagle List’ [pause] and you will have the option to ‘Search Eagle Lists’.

Search by ‘List Number’ or ‘List Description’.

The Description search is not case sensitive.

You can leave fields blank and press ‘Search’ to view all lists.

Click ‘View Items’ under the ‘Action’ heading [pause] and then the ‘Add Items to Project’ button.

A confirmation message appears.

Choose ‘View Project’ or Continue to remain on this page.

Retailers and their Registrants with a Stand Alone Eagle Gift Registry can manually Record Purchases.

Locate the Registry under ‘List Registry’ and select the ‘Manage’ button.

When the Registry appears choose the item being purchased.

Click the check mark icon to ‘Record Purchase’.

Enter the ‘Quantity Purchased’.

You can also choose to add the person’s ‘Name’ or ‘Email’ that is buying the item.

Click ‘Record Purchase’. Confirmation appears in red.

When customers purchase items in your store you can decrement the appropriate registry at the POS terminal.

Enter the SKU and the Quantity.

With the cursor in the Quantity field click the ‘Menu’ button.

Select ‘Sell Gift Registry Item’.

Enter the Registration number. You do not need to include any leading zeros.

Complete the sale as you normally would.

The Registry number appears on the receipt.

We have examined how you, the Retailer, utilize your administrative capabilities within your Eagle Gift and List Registry website.

You now have the tools to manage Users, Registries and Projects.

Utilize the Item List function in your Eagle system to quickly load multiple SKUS and keep the Quantities accurate within each list by decrementing the Requested amounts online and in Point of Sale.