ECi USERS CONFERENCE

Empowerment 2008

ECinteractive™
Part I

ECi DDMS®

Contents

To get the most up-to-date documentation, refer to your ECinteractive online help. Online help is available on your ECinteractive web pages. And remember, when using the online help program, context-sensitive help is always at your fingertips. Simply open the web page to view and press F1.

About ECinteractive

ECinteractive™ is our next generation Web storefront and online customer service solution for DDMS™ business systems. ECinteractive features a completely new e-commerce storefront application, running on a platform designed from the ground up to provide you with a significant advantage in competing for online business.

ECinteractive offers an all-new user interface, advanced features, and robust integration with your business system. Naturally, the new product also includes many of the widely-used features from Dealer Station®, while incorporating advanced technologies like AJAX, Microsoft's latest SQL Server database architecture, and the Microsoft® .NET programming framework.

In this class, we'll focus on setting up your ECinteractive administrative web site, including each of the following:

- Site Configuration
- Product Management.

Throughout this document, references appear in parenthesis following the web page's name. This reference indicates the site's left-hand pane where the web page can also be accessed. For example, to access the Change Password web page, you can click the down arrow in the Site Config section or click the Admin Site and click Change Password. See Figure 1.

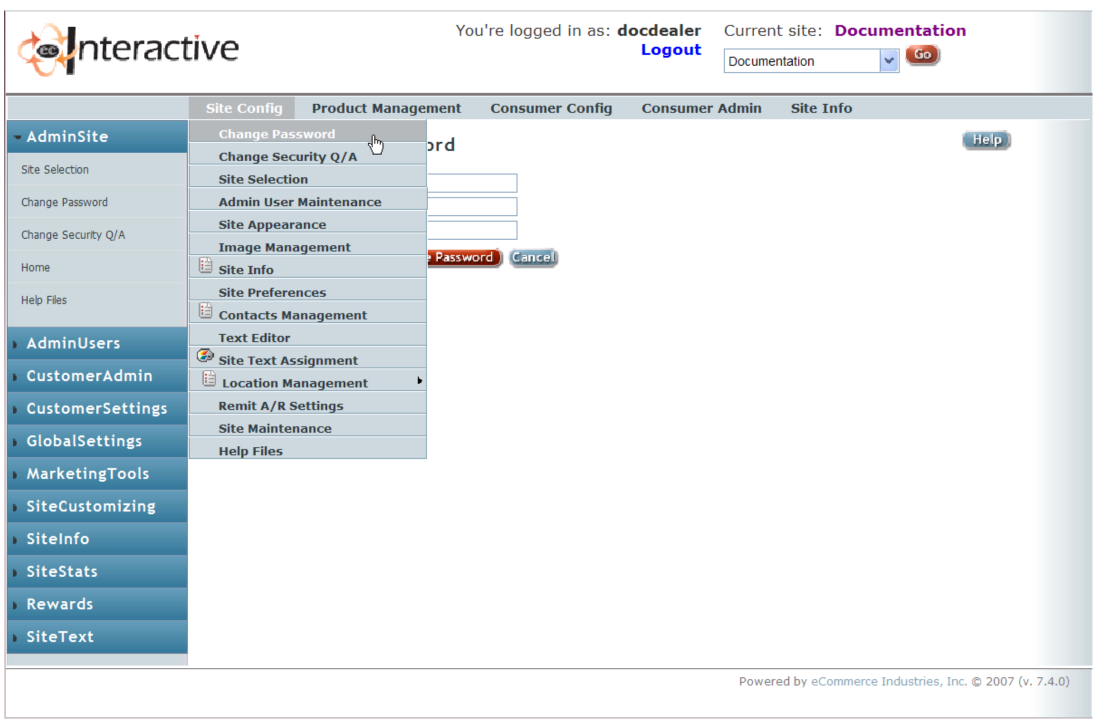


Figure 1: Accessing the Change Password Feature using the Site Config Drop Down Menu and the Admin Site Left Hand Pane

Site Configuration

This section of your administrative web site includes setting your passwords, security information, admin users, site and image management as well as your company information.

Passwords are not visible to the user in ECinteractive.

Change Password

1. Click the Site Config training toolbar and select Change Password. You can also click Admin Site and select Change Password. The Change Your Password page opens.
2. Click the Password box and enter your current password.
3. Click the New Password box and enter the new password. You must specify at least six alphanumeric characters.
4. Click the Confirm New Password box and enter the new password again.
5. Click Change Password.

Initially, all administrative users are set up with the What is Your Favorite Color security question. Red is the corresponding security answer.

Change Security Q/A

When changing your password, you must correctly answer a security question. You select your security question and set the answer on the Change Security Q/A page.

1. Click the Site Config training toolbar and select Change Security Q/A. You can also click Admin Site and select Change Security Q/A.
2. Click the Current Password box and enter your password.
3. Click the down arrow in the Security Question box and select a question.
4. Click the Security Answer box and enter the answer for the security question.
5. Click Update.

Site Selection

This web page is useful when you have multiple sites. It lets you choose a site as the default when logging in.

1. Click the Site Config training toolbar and select Site Selection. You can also click Admin Site and select Site Selection. The system displays a list of available sites.
2. Click the Make the Selected Site My Default Site When I Login check box.
3. Under the Site Name heading, click the site to select as the default when logging in.
4. Your changes are saved. The system returns to the Admin Home page.

Admin User Maintenance

To refresh the page, click .

1 Click the Site Config training toolbar and click Admin User Maintenance. You can also click Admin Users and select Admin User Management.

2 On the Current Admin Users page, you can:

Click to edit existing admin users.

Click to delete existing admin users that no longer require access. At the Delete This User prompt, click OK. (Those users that appear as Online cannot be deleted.)

Click to unlock admin users. To determine if a user account is locked, view the Locked column for a check mark. Accounts are locked after five unsuccessful attempts to log in.

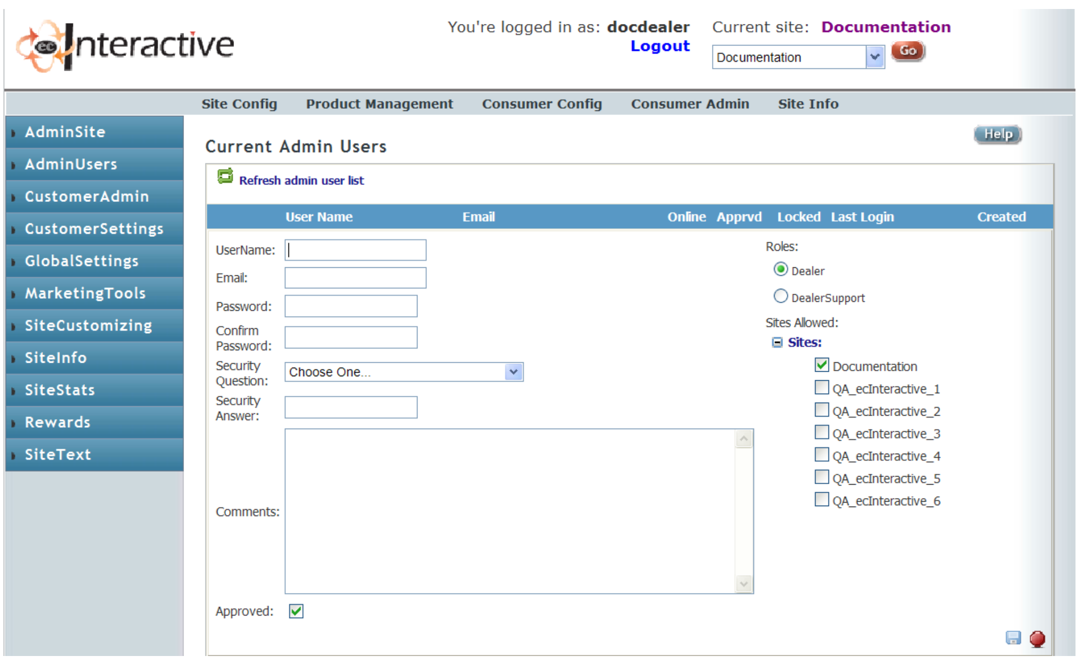
Click Add New Admin User to add an additional admin user. The Current Admin Users web page opens. See Figure 2. To add the new user:

If administrative users forget their password, ECinteractive uses the address you specify in the Email box to send the password.

2.1 Click the User Name box. Enter a name for this user.

2.2 Click the Email box and enter the user's email address.

Figure 2: Adding an Administrative User



Passwords are not visible to the user in ECinteractive.

2.3 Click the Password box and enter a password for this user. You must specify at least six alphanumeric characters.

2.4 Click the Confirm Password box and re-enter the password.

2.5 Click the down arrow in the Security Question box and select a security question for the user. If the administrative user forgets the password, you can email the security question to the user.

2.6 Click the Security Answer box and enter the answer to the security question.

2.7 Enter any comments about this user in the Comments box.

2.8 If the user is approved, click Approved. To deny the user approval, clear the check box.

2.9 Under the Roles heading, click a role for this user, for example, Dealer. You could decide to assign the Dealer option to senior or upper level management while assigning the Dealer Support option to sales managers, customer service managers, and so on.

2.10 Under the Sites Allowed heading, click the check box for each site to grant the user access. To deny access, clear the check box.

2.11 When finished, click . To discard the information, click .

Site Appearance

You can use this page to choose the theme and layout for the front end site. To refresh the page, click .

The system updates the end user's web site with the theme and layouts you selected within 30 minutes.

1. Click the Site Config training toolbar and select Site Appearance. You can also click Global Settings and choose Site Appearance.
2. Click the down arrow in the Theme box and select a color theme for the front end site. You can select blue, green, gray, purple, red, yellow, or tan.
3. Click the down arrow in the Layout box to select a site layout for the front end site. You can select Framed Site or No Frames. This option allows you to frame the storefront site within your company's existing web site.

Note: If you are using Internet Explorer 7, security settings for third party cookies may create problems when using the Framed Site or No Frames feature. If you experience problems, open an Internet Explorer 7 window and click the Tools menu. Click Internet Options. When the window opens, click the Privacy tab. Click the Sites button. In the Address of Web Site box, type www.ecinteractive.com. Click the Allow button. Click OK and click OK again until you return to the Internet Explorer 7 window.

Image Management

You can use the Image Management feature to load a logo image for your administrative and end user home pages. This tool is just another way to customize your site to appeal to your customers.

1 Click the Site Config training toolbar and select Image Management. You can also click Site Info and choose Image Management.

2 To load logos:

2.1 Click the Browse button to locate the logo to upload, LOGO.gif, for example.

2.2 Click Upload New Image. The image is added to the Existing Image List and is saved to the image server.

2.3 Once you have uploaded the image, you place it on the website. In the Existing Image List section, click the name of the image to place, LOGO.gif, for example.

2.4 The image opens. To make the image appear as your logo throughout the front end web site, click Save As Logo Image.

3 To load images:

3.1 You can upload image files. These files can be used when you create various pages using Text Editor.

3.2 You can also delete image files. To do so, click the image to highlight it and click .

Site Info

You can use the Site Info page to provide your company information, as shown in Figure 3.

1 Click the Site Config training toolbar and select Site Info. You can also click Site Info and choose Site Info.

2 Click Edit.

3 Click the Dealer Name box and enter a new name for the site.

4 Click the Dealership Initials box and enter the new initials for the site.

5 Click the Phone Number box and enter a new phone number. You must enter numeric characters in this box. If you enter alpha characters, the phone number displays as (000) 000-0000 on emails and remittance forms.

6 Click the Fax Number box and enter a new fax number. You must enter numeric characters in this box. If you enter alpha characters, the fax number displays as (000) 000-0000 on emails and remittance forms.

7 Click the down arrow in the Address type box and select an address type, Billing or Shipping, for example. Since online accounts receivable features are available, we recommend that you do not select the Remit A/R option.

8 Click the Address Line 1 box and enter Line 1 of your address.

9 Click the Address Line 2 box and enter Line 2 of your address, if applicable.

10 Click the City box and enter your city's name.

11 Click the down arrow in the State box and select your state.

12 Click the Postal Code box and enter your postal code.

13 Click the Main Website Address box and enter a new site name. This Main Web address is automatically identified when the front end web page is created. This web address prints on confirmation emails under the dealer's phone number. It also prints on remittance forms and when printing information from the order history page.

14 Click the Sales Contact Name box and enter a new sales contact name. The information in this box displays on confirmation emails as the From addressee name.

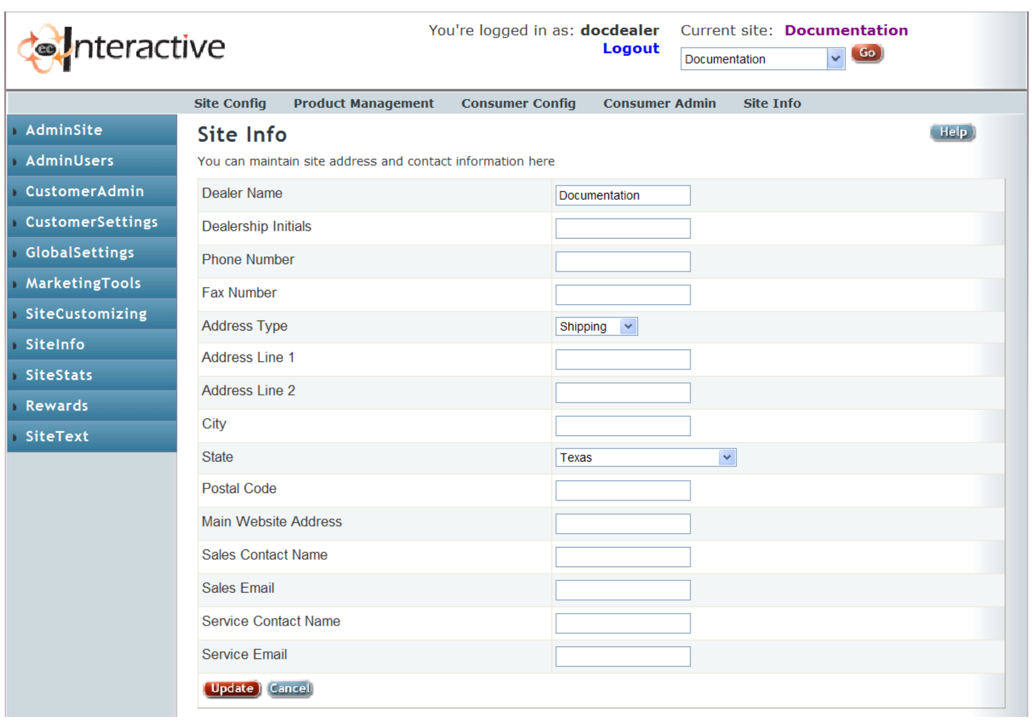


Figure 3: Editing Site Information

15 Click the Sales Email box and enter a new salesperson's email address. The information in this box displays on confirmation emails as the From addressee email address.

16 Click the Service Contact Name box and enter a new service contact person. The information in this box displays on confirmation emails under the dealer's address.

17 Click the Service Email box and enter a new service email address. The information in this box displays on confirmation emails under the dealer's address. If you allow shoppers to add, edit, and delete credit cards on the back end business system, an email address is sent to the address specified in this box whenever credit cards are added or changed. Make sure an email address is set up in this box if you intend to use this feature.

18 Click Update.

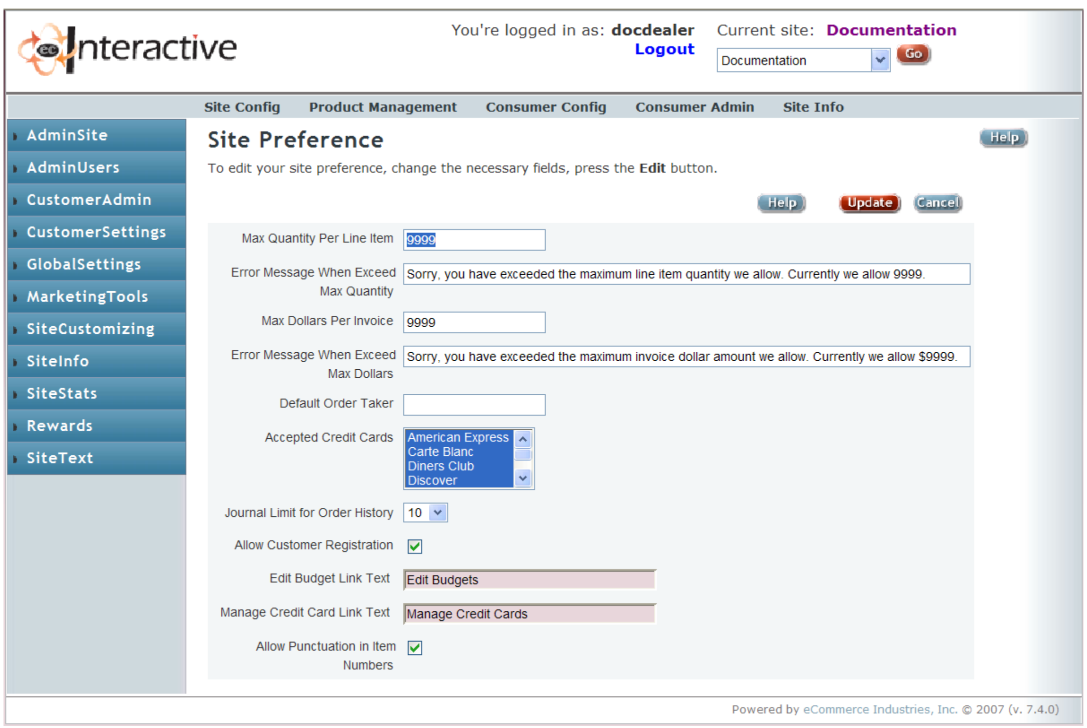
Site Preferences

This page allows you to view and edit the preferences for your site.

1 Click the Site Config training toolbar and select Site Preferences. You can also click Global Settings and choose Site Preferences.

2 Click Edit. The Site Preference web page opens. See Figure 4.

Figure 4: Editing Site Preferences



3 Click the box to change and type your new preference over the old. You can edit each of the following:

- **Max Quantity Per Line Item:** Enter a maximum quantity shoppers can purchase of any single line item. To use this feature, enter the maximum quantity limit in this box, 500, for example. The default for this box is 9999 line items. If you leave this box blank, there is no maximum quantity amount. Your end users can order an unlimited number of any single line item. (You enter the text the user sees in the Error Message When Exceed Max Quantity box.)
- **Error Message When Exceed Max Quantity:** Click this box and enter the text the user sees when exceeding the maximum item quantity allowed for each item. If the user exceeds the item amount, the system displays a warning message on the end user's Checkout page. This box defaults to display the text You Have Exceeded the Maximum Allowed Quantity. (You enter the maximum item quantity allowed in the Max Quantity Per Line Item box.)
- **Max Dollars Per Invoice:** Enter a maximum (pre-tax) dollar limit for each order your users place. To use this feature, enter the maximum dollar limit all in one string. For example, to place the maximum order limit at $1,000, enter 1000 in this box. The default for this box is $9,999.00. The system checks the order total when the end user opens the Checkout web page. (You enter the text the user sees in the Error Message When Exceed Max Dollars box.)
- **Error Message When Exceed Max Dollars:** Click this box and enter the text the user sees when exceeding the maximum dollars allowed for each invoice. If the user exceeds the total amount, the system displays a warning message on the Checkout page. This box defaults to the text You Have Exceeded the Maximum Dollars Per Invoice. (You enter the maximum dollar quantity allowed in the Max Dollars Per Invoice box.)
- **Default Order Taker:** Enter a default order-taker for all the orders that come through the system. You can specify up to four alphanumeric characters. The order-taker you specify must be set up in the Salesperson Database on the system. This box defaults to blank.
- **Accepted Credit Cards:** Click each credit card the end user is allowed to use when paying for purchases in the Accepted Credit Cards box. Hold the Ctrl key to select multiple credit cards. The information you specify appears as a drop down list box on the end user's Checkout and Remit A/R web pages. This box defaults to blank to accept no credit cards.

Renamed sales journal information comes from the (LGA) Sales Journals Parameters screen on the back office business system.

- **Journal Limit for Order History:** This box displays the number of months shoppers can search for order history. This box defaults to 6 months. To change the setting, click the down arrow and choose a limit. You can choose numbers 0-12. If you set this box to 0, only orders from the existing P-MASTER and JOUR-PO files can be viewed.
- **Allow Customer Registration:** Click the Allow Customer Registration box to let the end user register (sign up) on the end user’s web page. This default for this box is turned off, or unchecked. If you check this box, a link appears on the end user’s web page in the My Account section with the text Sign Me Up. This link also appears on the end user’s Login web page. This link allows the end user to create a new customer account within the end user’s web site as well as on the back end business system. If you leave this box blank, the Sign Me Up link does not appear. In addition, this box must be checked to allow guest users to checkout.
- **Edit Budget Link Text:** Click this box to change the text of the link that appears on the end user’s top menu. This link appears in the My Account drop down menu. This box defaults to Edit Budget. You could change it to Edit Your Budgets, for example.

If you do not allow your end user’s to access the Credit Card Editor web page, the link does not appear in the My Account drop down menu. In this case, it doesn’t matter what text is specified in the Manage Credit Card Link Text box.

- **Manage Credit Card Link Text:** This box applies to the end user’s Credit Card Editor web page. If you allow end user’s to add, edit, or delete credit cards, this box lets you specify the link text that appears on the end user’s site. Click this box to change the text of the link that appears on the end user’s top menu. This link appears in the My Account drop down menu. This box defaults to Manage Credit Cards. You could change it to Manage Your Credit Cards, for example.
- **Allow Punctuation in Item Numbers:** This box lets you determine whether item numbers containing special characters are allowed when the system searches for items on the end user’s site. Special characters include the following: ~‘!@#$%^&*()-=_+[]\{}|;’:”,./<>? and space. This applies to the Item Number box on the Quick Order, Favorites, and Order History web pages. The Item Number box on the end user’s Advanced Search webpage is not affected by this parameter. If you check this box, the system accepts all letters, numbers, special characters and punctuation that the end user specifies and uses them when searching for items. If you leave this box blank, special characters are removed before the system begins searching for items. For example, if the end user specifies !Lag &%40*(&@5 0>1 as the item number, the system searches for LAG40501. This box defaults to off, or unchecked.

4 When finished, click Update.

To refresh the page, click .

Contacts Management

This page stores the information about the contact person for the site. The contacts you specify here appear on the shopper's Contact Us web page.

1 Click the Site Config training toolbar and select Contacts Management. You can also click Site Info and choose Contacts Management.

2 On the Manage Site Contacts page, you can:

Click to edit existing contacts.

Click to delete existing contacts. At the Are You Sure prompt, click OK.

Click Add New Contact. To add a contact name and email address:

2.1 Click the Contact Name box and enter the name of the person to act as contact for the site. This name displays to the shopper. You must enter a contact in this box.

2.2 Click the Email box and enter an email address associated with the contact's name you specified. You must enter an address in this box.

2.3 Click to save.

Text Editor

You can use the Text Editor to build pages for your site. While you can enter Text or HTML script, if you choose Text and later change to HTML, you must reformat the text. For example, you can create text that appears on the shopper's Home page, About Us page, Contact Us, and Privacy Policy pages. Once built, you assign these pages by using Site Text Assignment or Account News.

1 Click the Site Config training toolbar and click Site Text. You can also click Site Text and select Text Editor. The Text Editor page opens.

2 Click the down arrow in the Select Text box to select a page. You can:

- Add a new page by selecting New Text in the Select Text box. Then click the Text Description box and enter a description for this page, About Us, for example.
- Edit an existing text editor page by selecting it from the drop down Select Text list, as shown in Figure 5.

3 Click the Text Description box and enter a description for this page, About Us, for example.

4 Click the HTML Capable or Plain Text tab.

5 Click the body of the Text Editor box and specify the text for the page you are creating. The text you enter displays on the shopper's web site. If you are creating an HTML page, use the icons in the menu bars surrounding the window to format the text.

6 When finished:

- Click Save to save the changes you made.
- Click Copy save a copy of the page.
- Click Delete to remove the page. At the Delete This Page prompt, click OK.

Site Text Assignment

Use the Site Text Assignment page to assign content to the About Us, Contact Us, Home, and Privacy Policy pages. This is the information displayed to the shopper when the page is accessed. For example, if the shopper clicks the About Us link, the text you set up to be shown appears. You can also use the Site Text Assignment page to assign the shopper's Checkout Text and Confirmation Email information. You create new text, such as About Us text, using the Text Editor page.

1 Click the Site Config training toolbar and click Site Text Assignment. You can also click Site Text and select Site Text Assignment.

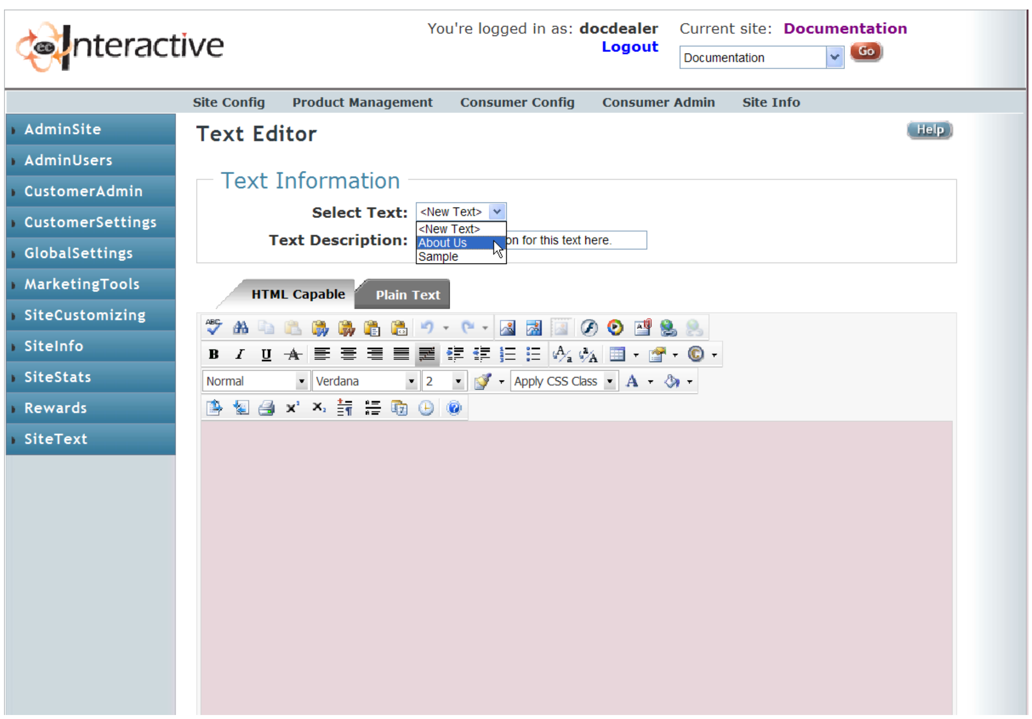


Figure 5: Selecting the Edit the About Us End User Web Page

2 The Page opens, displaying three tabs: Site Pages, Checkout Text, and Emails. Click the appropriate tab. See Figure 6.

3 When you open the appropriate tab, you can:

Click to view detail concerning a page.

Click to change the page assigned. Next, click the down arrow in the Text Description box and select the page to assign. Click .

You enter the text description when you create new text, such as About Us text, using the Text Editor page.

Error Text

You can use the Custom Error Editor page to customize the Items Not Allowed message. If you restrict a shopper to a current list of items or catalogs, an error message displays when the shopper attempts to purchase an item not included in the restricted list. You can specify up to 250 alphanumeric characters, including spaces.

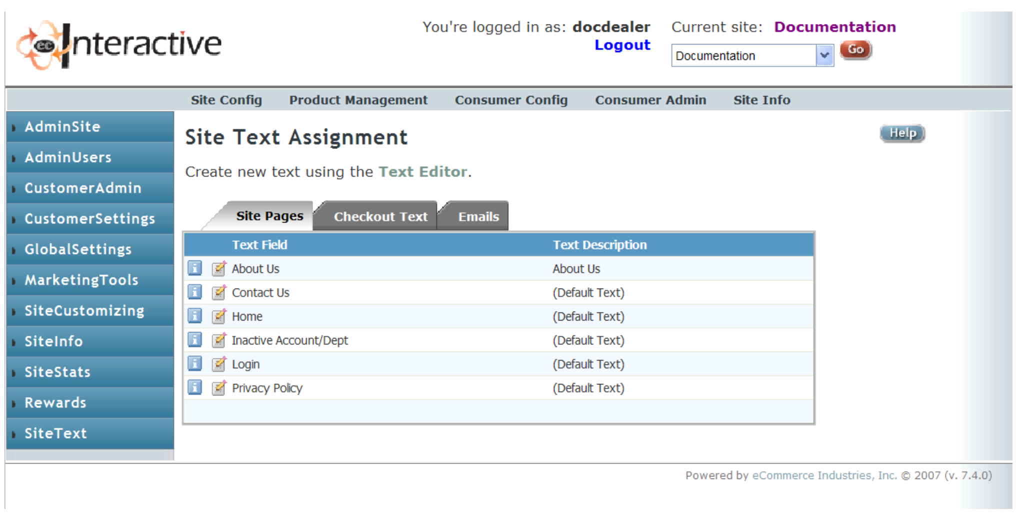
1 Click Site Customizing and select Error Text. The Custom Error Editor page opens.

2 Click the down arrow in the Select an Error box and choose the Items Not Allowed option.

3 Click the body of the Page Editor box and enter the text for this error. Use the icons in the menu bars surrounding the window to format text.

4 When finished, click Save.

Figure 6: Viewing the Site Text Assignment Web Page



Location Management

You can manage a G/L location, an inventory location, and a printer ID as a group. The information for each location displays in the grid. You can sort the locations by description, G/L, inventory, or printer ID. Click the column heading to re-sort the grid.

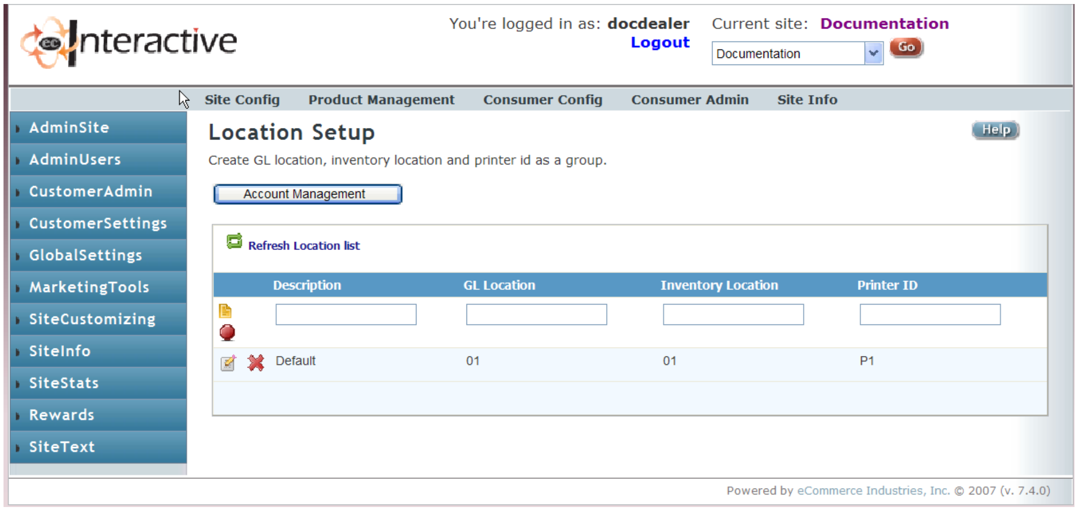
1. Click the Site Config training toolbar and click Location Management. You can also click Site Info and select Location Management.
2. Click Add New Location.
3. Click the Description box, shown in Figure 7, and enter a descriptive name for the group.
4. Click the GL Location box and enter the general ledger's location.
5. Click the Inventory Location box and enter the inventory's location.
6. Click the Printer ID box and enter the logical name of the printer to use.
7. Click to save.

Account Management

Once you have your groups set up, you can assign accounts to locations. The information for each account displays in the Account Management page. In this page, you can sort the accounts by account code, description, or printer.

1. Click the Site Config training toolbar and select Location Management and then Account Management. The Account Management page opens, displaying the Manage Account/Dept tab.

Figure 7: The Description Box



Note: Active customers display with a green icon, inactive customers appear with a red icon, and gray icons indicate an O/E exempt customer. You can view inactive customer information in the Inactive Customers tab.

This page lets you set filters to the limit information. For example, you can set a filter to only include accounts containing a specific number. To set a filter, click to the right of the box and select a filter from the drop down box.

2 Click the down arrow in the Select Location box and choose the location to use.

3 Click Add New Account to add a new account number.

4 Click the Account Nbr box and enter the customer's account number. The account number you specify must exist in the back end business system.

5 Click the Account Printer box and enter the logical name of the printer to use, P1, for example.

6 Click to save. The Account Added Successfully message appears.

7 Click the check box in the Sync Departments column corresponding to the account to include. You must perform this step whether the account has departments or not. This step brings over all departments associated with the account from the back end business system.

8 Click the Sync Departments for Checked Accounts button.

Note: We recommend you do not click the Sync Departments for All Accounts button during normal business hours. Doing so can slow down your system and affect your server's performance. Instead, we recommend you perform this function after regular business hours.

9 At the Are You Sure prompt, click OK.

10 The Departments Synchronized For Selected Account(s) message appears. Repeat these steps until all the necessary accounts have been added.

11 After the departments have been synchronized, you can assign different general ledger and inventory locations to an account's department. The locations you assign do not have to exist in the Location Management page. The master account defaults to the general ledger and inventory locations unless it is changed. To do so:

11.1 Click beside the account number to view the existing departments.

11.2 Click beside the department to change. See Figure 8.

11.3 Click the GL box to assign a general ledger location for this department. The general ledger location you enter overrides the location set up for the account to which this department belongs.

11.4 Click the Inv box to assign an inventory location for this department. The inventory location you enter overrides the location set up for the account to which this department belongs.

11.5 Click the Printer box to enter the printer to use for this department.

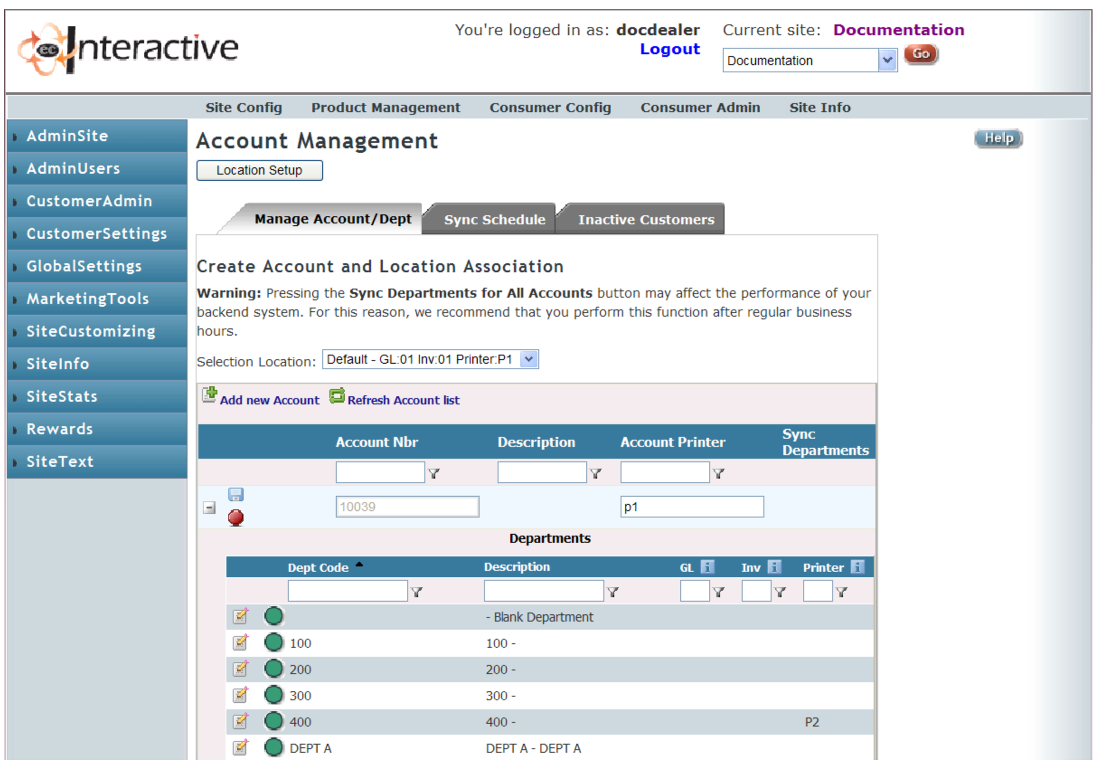
11.6 When finished, click .

12 You can use the Sync Schedule tab to specify when the system should sync your accounts in the back end business system. You can specify to sync accounts on a daily, weekly, monthly, or single time basis. This page helps you better manage your customer accounts. To do so:

12.1 From the Account Management page opens, click the Sync Schedule tab.

12.2 Using the Sync Schedule options, choose how often the system should sync accounts. You can choose from Daily, Weekly, Monthly, One Time. Click the appropriate option.

Figure 8: Adding New Accounts



12.3 Click the Next Sync Date box and enter the date when the system should sync accounts. You can also click to open the calendar and select the date.

12.4 Click the Begin Sync Time (EST) box and enter the time when the system should sync accounts. This box defaults to Eastern Standard Time.

12.5 When finished, click Update.

In the Inactive Customers tab, you can click the column heading to re-sort the account list.

13 You can use the Inactive Customers tab to view customers that are currently marked as inactive. Active customers display with a green icon, inactive customers appear with a red icon, and gray icons indicate an O/E exempt customer. You cannot change information in this tab; it is for display only.

13.1 From the Account Management page, click the Inactive Customers tab.

13.2 View the accounts that are currently inactive. To access the Customer Account Management page, click the link.

Remit A/R Settings

This page lets you enter the address that customers use when mailing payments. You must specify a separate G/L location for each remittance address. You set up G/L locations in Location Management.

You can simplify your end user's receivables by using the online accounts receivable (remittance) feature. You can specify which end user accounts can access their outstanding A/R balances from the back end business system. It is not limited to Web orders. It includes all outstanding balances associated with the Customer's A/R account in the back end business system.

Online A/R can also be turned on for selected customers who can then select invoices to pay, print a remittance form and mail it with payment.

To Set Up the A/R Online Feature:

- Specify the address that customers use when mailing payments. You must specify a G/L location for each remittance address. You can enter a separate remittance address for each location you set up in Location Management.
- Specify the customers that can print the remittance form from the web page by clicking Customer Settings - Feature. Edit an existing group (or Add a new group). Check the Allow Online AR Remittance option located at the bottom of the Feature Settings page. Assign this feature setting to the selected shoppers. This activates the Pay Invoices link on the shopper's page.

Once the shopper logs in, the Pay Invoices link appears under My Account on the top navigation bar. When clicked, a listing of outstanding invoices from the customer's A/R history appear. Shoppers can limit invoices by Current, Over 30 Days, Over 60 Days, and Over 90 Days. They then select the invoices to pay and clicking the Print Remit Form link. To print the remittance form, pop-ups must be allowed on the end user's site.

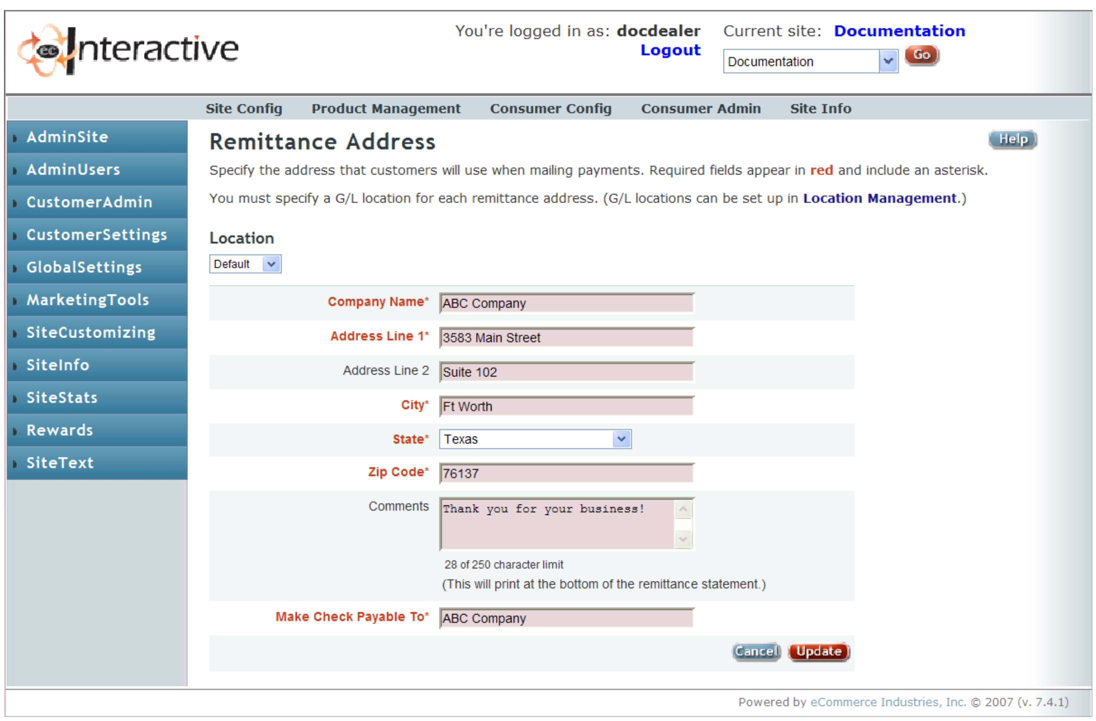
1. Click the Site Config training toolbar and click Remit A/R Settings. You can also click Site Info and select Remit A/R Settings. The Remittance Address page opens.
2. Click the down arrow in the Location box and select the location for the address to add.
3. Click Edit. A new page opens, as shown in Figure 9. This page lets you specify the address information. Complete the steps below to enter the company's remittance address. Required boxes appear in red.

   3.1 Click the Company box and enter the company's remittance address name.

   3.2 Click the Address Line 1 and Address Line 2 boxes and enter the company's remittance address.

   3.3 Click the City box and enter the city in the company's remittance address.

Figure 9: Adding a Remittance Address



3.4 Click the down arrow in the State box and select a Canadian province or a United States state in this box.

3.5 Click the Zip Code box and enter the company's zip code. If you are a Canadian dealer, you can enter alphanumeric characters in the Zip Code box.

3.6 In the Comments box, you can enter up to 250 characters of alphanumeric text.

3.7 In the Make Check Payable To box, enter the text to use when mailing payments.

3.8 Click Update.

To refresh the page, click .

Site Maintenance

You can use the Site Maintenance page to specify information on your end user's site when the system is down for maintenance. For example, during the software update maintenance period, your Web storefront is unavailable. You can schedule your site to be Offline for Maintenance using these instructions.

1. Click the Site Config training toolbar and click Site Maintenance. You can also click Global Settings and select Site Maintenance.
2. The Site Status box displays whether the site is currently up or down and the current time. It displays the current time zone and daylight savings time you have selected and cannot be manually changed. This box is automatically updated when the Time Zone and Use Daylight Savings Time boxes are adjusted. The time displays in AM and PM format, not military format. It also displays whether you have the automatic maintenance feature enabled or disabled.
3. The Time Zone box defaults to Eastern Time. To change the time zone, click the down arrow in the Time Zone box and select the appropriate time zone.
4. Check the Use Daylight Savings Time box to indicate whether to utilize the daylight savings time feature.
5. The Unscheduled Maintenance box allows you to toggle your ecommerce site off or on for system maintenance whenever necessary. This change affects the ecommerce site within one to two minutes.

   Display Page: Click the down arrow in the Display Page box to select the web page shoppers view when the site is in unscheduled maintenance mode. To view detail, click the down arrow and select the page to view, and then click . To create a new web page, click the Create Pages link.

Shutdown Site: When you click this button, the shopper's site is turned off. All shoppers accessing the site are unable to open any web page or perform any function.

Startup Site: When you click this button, the shopper's site is turned on.

6 The Automatic Scheduled Maintenance box lets you specify that all your ecommerce sites be automatically shut down for maintenance.

Automatic Maintenance Mode On: To activate the automatic maintenance mode feature, click this button. At the This Could Inactivate Your Website for Customers Are You Sure prompt, click OK. To deactivate this feature, click the Auto Maintenance Mode Off button.

Weekdays Time Off/Time On/Display Page: Click the Weekdays Time Off box and enter the beginning maintenance time for Monday through Friday, 11:00 PM, for example. Click the Weekdays Time On box and enter the ending maintenance time for Monday through Friday. These boxes default to 12:00 AM. The time is displayed in AM and PM format, not military time. Click the down arrow in the Display Page to select the web page end users view when the site is in weekday maintenance mode. To view detail concerning a page, click . To create a new web page, click the Create Pages link.

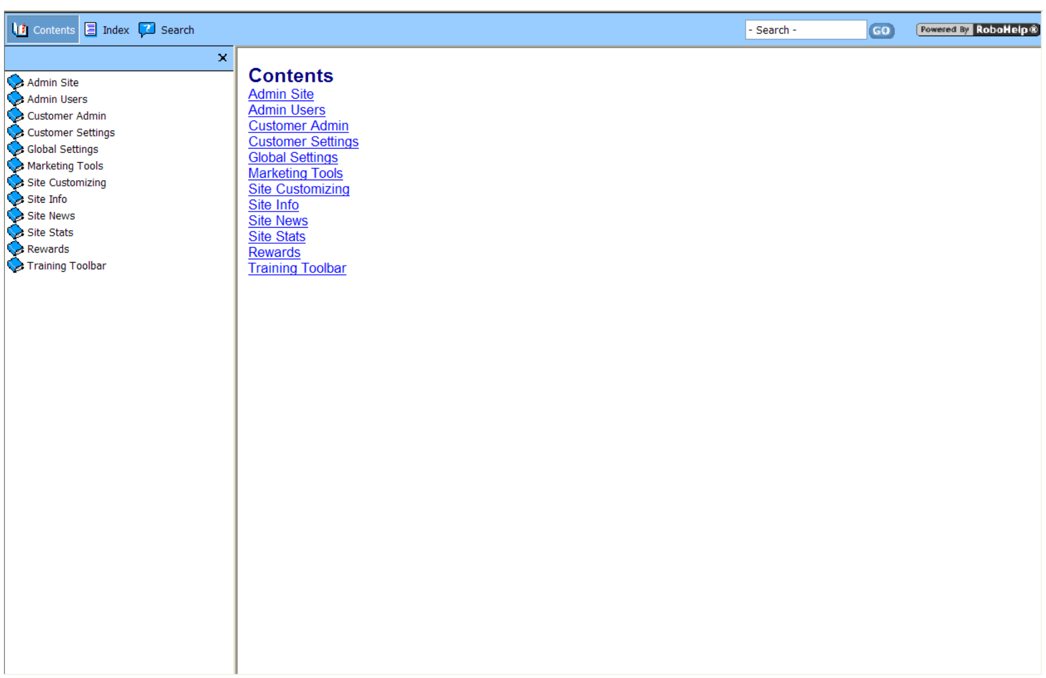


Figure 10: The ECinteractive Contents Help Page

Weekends Time Off/Time On/Display Page: Click the Weekends Time Off box and enter the beginning maintenance time for Saturday and Sunday. Click the Weekends Time Off box and enter the ending maintenance time for Saturday and Sunday. These boxes default to 12:00 AM. The time is displayed in AM and PM format, not military time. Click the down arrow in the Display Page to select the web page end users view when the site is in weekend maintenance mode. To view detail concerning a page, click i.

7 Click Update. The changes are implemented within one minute.

Note: If you are performing these steps for software update maintenance, on Monday, return to these settings, and click Auto Maintenance Mode Off. For your Quarterly Electronic Catalog Maintenance (usually in January, April, July, and October), use the steps above, but set up both Weekday and Weekend times and web pages.

Help Files

1 Click the Site Config training toolbar and click Help Files. You can also click Admin Site and select Help Files. The ECinteractive Contents Help page opens. See Figure 10.

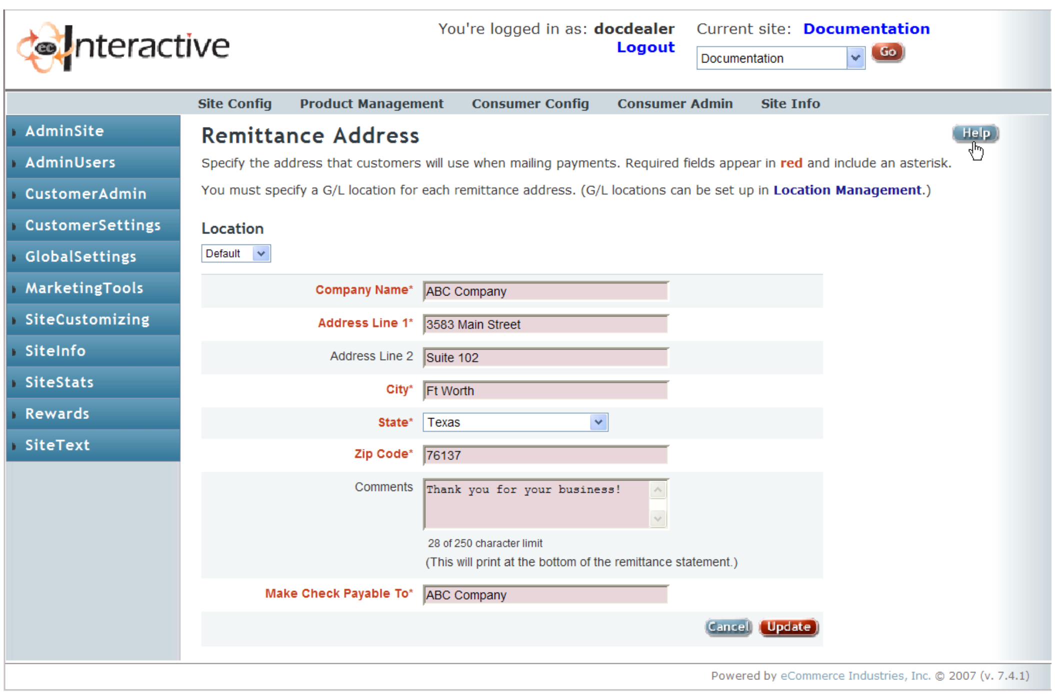


Figure 11: Clicking the Help Button on Individual Web Pages

2 ECinteractive help is also available on individual web pages. For example, in the Remittance Address web page, you can easily open Help for the Remittance Address feature by clicking the Help button. See Figure 11.

Product Management

This section of your administrative web site includes managing your catalogs, items, web specials, and preferred items.

Global Catalog Group Management

Instead of using a standard vendor's catalog, you can design custom catalogs, containing items of your choice. Once the custom catalog is assembled you can assign it to your shoppers. Since you can create as many different custom catalogs as needed, this tool offers increased sales flexibility. By creating custom catalogs, you can limit the number of global catalogs your site uses. This speeds up the catalog search results, and prevents overloading the servers.

In the Global Catalog Group Management web page, you can easily determine which catalog(s) have been identified as the global catalog option. If you need to change your global catalog, contact your ECi support team.

1 Click the Product Management training toolbar and click Global Catalog Group Management. You can also click Global Settings and select Global Catalog Group Management.

2 Click beside the catalog group to determine which catalogs and / or flyers are associated with that group. To change your global catalog, contact your ECi support team.

Catalog Descriptions

If necessary, you can use this page to change the catalog description that displays on the shopper's Product Detail web page.

1 Click the Product Management training toolbar and click Catalog Descriptions. You can also click Site Customizing and select Catalog Descriptions.

2 Click next to the catalog description to change.

3 In the Dealer Description box, enter the text for this catalog.

4 Click .

On the Item Management page, you can click any heading to re-sort the catalogs.

Item Management

The Item Management feature lets you add an item to the custom catalog and provide as much or as little information about the item as needed. You can also upload a picture of the item.

Note: The item must exist in the back end business system.

1 Click the Product Management training toolbar and click Item Management. You can also click Site Customizing and select Item Management.

You can set filters to limit the information. For example, you can set a filter to only include items beginning with MMM. To set a filter, click to the right of the box and select a filter from the drop down box.

2 Click Add New Item. The Manage Items web page opens, as shown in Figure 12. To add the item, complete the following boxes:

2.1 Click the Prefix box and enter a prefix for this item.

2.2 Click the Item Nbr box and enter an item number.

2.3 Click the Name box and enter the item name. You can enter up to 255 characters in this box.

2.4 Click the Manufacturer box and enter the name of the manufacturer.

2.5 Click the Description box and enter the item description. You can enter up to 2,000 characters in this box.

2.6 Click the Keywords box and enter keywords to use when the shopper searches for this item.

2.7 Click the first Pack Content box and enter the quantity available in a unit of measure.

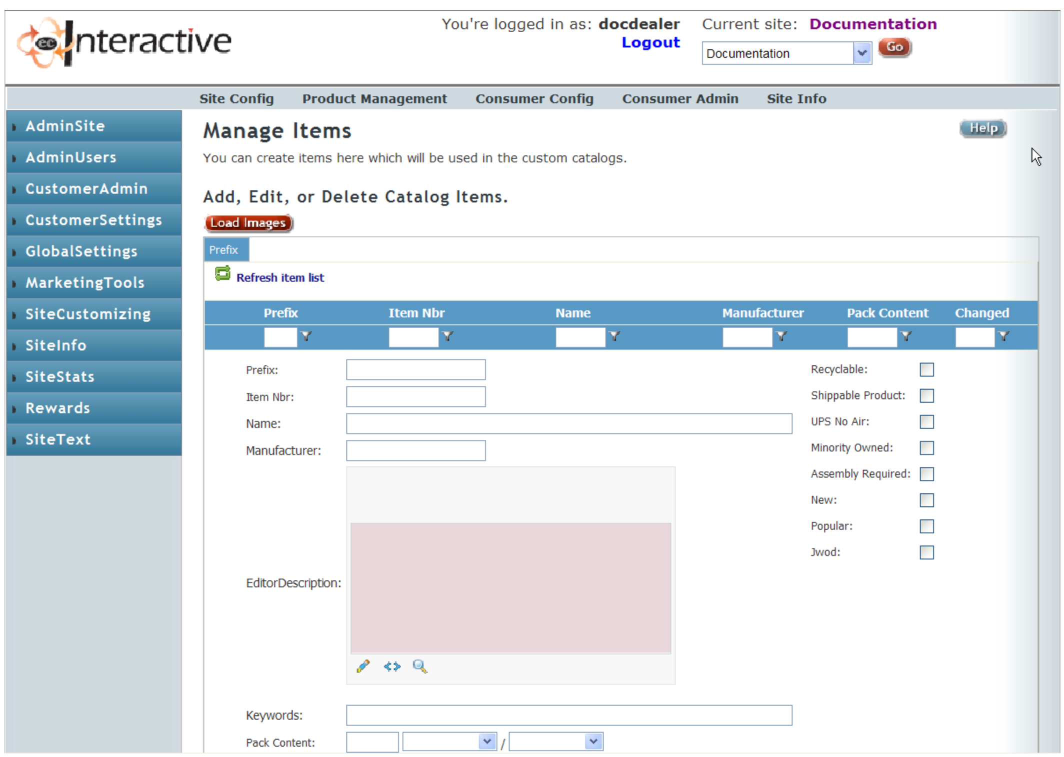


Figure 12: Using the Manage Item Web Page to Add a Custom Item

2.8 Click the down arrow in the second Pack Content box and select a unit of measure.

2.9 Click the down arrow in the third Pack Content box and select a unit of measure. For example, if there are three boxes of pencils in a carton, you would type 3 in the first box, select Box in the second box, and select Carton in the third.

2.10 Click the item attribute check boxes to select attributes that can help shoppers when searching for items on the Advanced Search web page.

2.11 When finished, click .

3 From the Item Management web page, you can also link pictures to item images. To do so:

3.1 Click Load Images.

3.2 Click Add New Image/Image Mapping to add images to items.

3.3 Click the down arrow in the Item (SKU) box and select the custom item.

3.4 Click the Thumbnail Image box and enter the thumbnail location. If you cannot recall the location, click Browse to access the image on your hard drive.

3.5 Click the Image box and enter the image location. If you cannot recall the location, click Browse to access the image on your hard drive.

3.6 Click to save the image to the item.

3.7 Click Continue when finished linking images to custom items.

Catalog Management

You can create a catalog from either custom items or existing vendor catalogs. You can create as many custom catalogs as needed.

1 Click the Product Management training toolbar and click Catalog Management. You can also click Site Customizing and select Catalog Management.

2 The Manage Custom Catalogs page opens. You can:

Click to edit an existing catalog name. Enter the new name over the exiting name and click .

Since this step involves renaming the catalog, if this catalog is part of a group, you must first remove it from the group before you can delete the catalog.

Click to delete an existing catalog. At the Are You Sure prompt, click OK.

Click Add New Catalog Name. Click the Catalog Name box and enter a new name for the catalog. The catalog name appears on the shopper's Product Detail web page. When finished, click .

Click to add a subcategory and / or item to the custom catalog. The Manage Custom Catalog Categories page opens. To add a subcategory:

2.1 Right-click the catalog and select Add Category, as shown in Figure 13. The New Category text appears. This is the subcategory that displays on the shopper's Home page when the shopper is assigned this catalog.

2.2 Right-click the New Category text, select Edit. Enter the custom category name to use, Writing Instruments, for example.

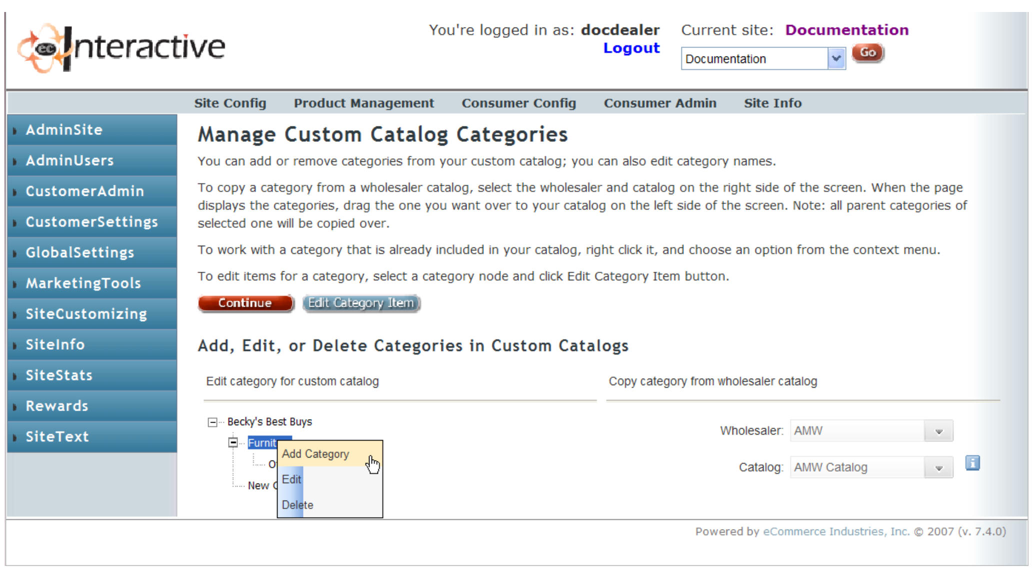
3 After you enter the name, you can add custom items to a subcategory in a custom catalog using the following instructions:

3.1 Click the category name to highlight it and click Edit Category Item.

3.2 The Manage Custom Catalog Items web page opens. Click the Get Items For Current Site XXX option. (The XX's are replaced with your site name.)

3.3 Click Get Item at the bottom of the page. A list of custom items that have been added to Item Management display on the right side of the page.

Figure 13: Selecting to Add a New Category



3.4 If necessary, click + to expand the manufacturer list of items.

3.5 When the items appear, click the corresponding check box to select the items to add to this current subcategory.

3.6 Click Add Item at the top of the list.

3.7 When finished adding custom items to the current subcategory, scroll to the top of the page and click Continue.

4 You can also create custom catalogs from existing vendor catalogs using the following instructions:

4.1 Right-click the catalog and select Add Category. The New Category text opens.

4.2 Right-click the New Category text, select Edit. Enter the custom category name.

4.3 Click the category name to highlight it and click Edit Category Item.

4.4 The Manage Custom Catalog Items web page opens. Click the Get Items From Wholesaler option.

4.5 Click the down arrow in the Choose a Wholesaler box and select the wholesaler to use.

- To view all items from this wholesaler, click the corresponding Get All option. Go to **Step 4.6**.
- To select the wholesaler catalog, click the Get By Catalog and its Category option. Click the down arrow in the Choose a Catalog box and select the catalog. Click i. The categories and sub categories for the catalog display. Click + to expand the list of items. Continue to click + until the item list is fully expanded.

4.6 Click Get Item at the bottom of the page.

4.7 Expand the manufacturer list of items and click the corresponding check box to select the items to add to this current subcategory.

4.8 Click Add Item at the top of the list.

4.9 When finished adding custom items to the current subcategory, scroll to the top of the page and click Continue.

Note: To create a custom catalog from both custom items and existing vendor catalogs, use a combination of these instructions. You can repeat the process until all custom catalogs have been created.

Custom Catalog Group Management

If you have multiple custom catalogs, you can assign them to a catalog group. Then you can assign the catalog group to your end users, enabling them to view several custom catalogs.

1. Click the Product Management training toolbar and click Custom Catalog Group Management. You can also click Site Info and select Custom Catalog Group Management.
2. In the Custom Catalog Group Management page, you can:

   Click to expand the catalogs within the group.

   Click to edit an existing catalog group. Any changes you make to an existing group affect all shoppers with the assigned custom catalog group.

   Click to delete an existing catalog group. At the Are You Sure prompt, click OK.

   Click Add New Group. See Figure 14. To add a new custom catalog group:

   2.1 Click the Group Name box and enter the name of the group. This is the name you use to assign custom catalogs to end users.

   2.2 Click the Available Catalogs box and select the name of the catalogs to add to the group. Hold down the Ctrl key to select multiple catalogs. Click the Forward button to add the catalogs to the group. To remove a catalog from the group, select it and click the Back button.

   2.3 Click the Set as Site Default Catalog Group box to make this group the default catalog group for your site. If it is not the default catalog group, clear the box.

   2.4 Click .

Note: You can assign the custom catalog groups to end users when you create user accounts.

Manufacturer Management

Although the Manufacturer Management page allows you to add new manufacturers, DO NOT modify any data on this page. Any changes made affect all dealer sites. DDMS is developing an enhancement to allow dealers to add custom manufacturer information (primarily for custom items).

1. Click the Product Management training toolbar and click Manufacturer Management. You can also click Global Settings and select Manufacturer Management.
2. When you finish viewing information, close the Manufacturer Management web page.

Web Specials

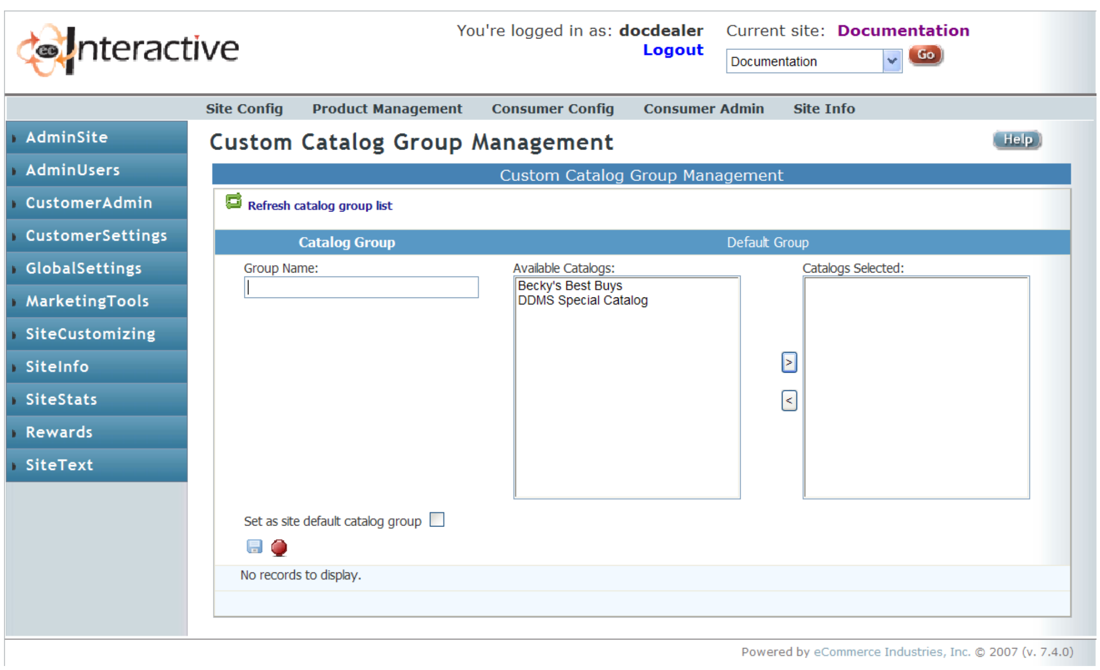
You can create web specials with special pricing for items ordered online (as opposed to ordering by phone, fax, or in person). You can forecast dates as needed for special promotional periods. Items must have e-content provided by the vendor or they must reside in the global or custom catalog that is assigned to the end user. Custom items can be added as well.

Note: While you can specify more than three web specials, only three display on the end user's web page.

---

1. Click the Product Management training toolbar and click Web Specials. You can also click Marketing Tools and select Web Specials.

Figure 14: Adding a New Custom Catalog Group



2 In the Manage Web Specials web page, you can:

Click to edit an existing web special. Enter the new information over the existing information and click .

Click to delete an existing web special. At the Are You Sure prompt, click OK.

Click Add New Web Special. See Figure 15. To add a new item:

2.1 Click the SKU box and enter the company prefix and item number.

The cursor does not move to the UM box. The unit of measure automatically displays from the back end business system when you retrieve the item.

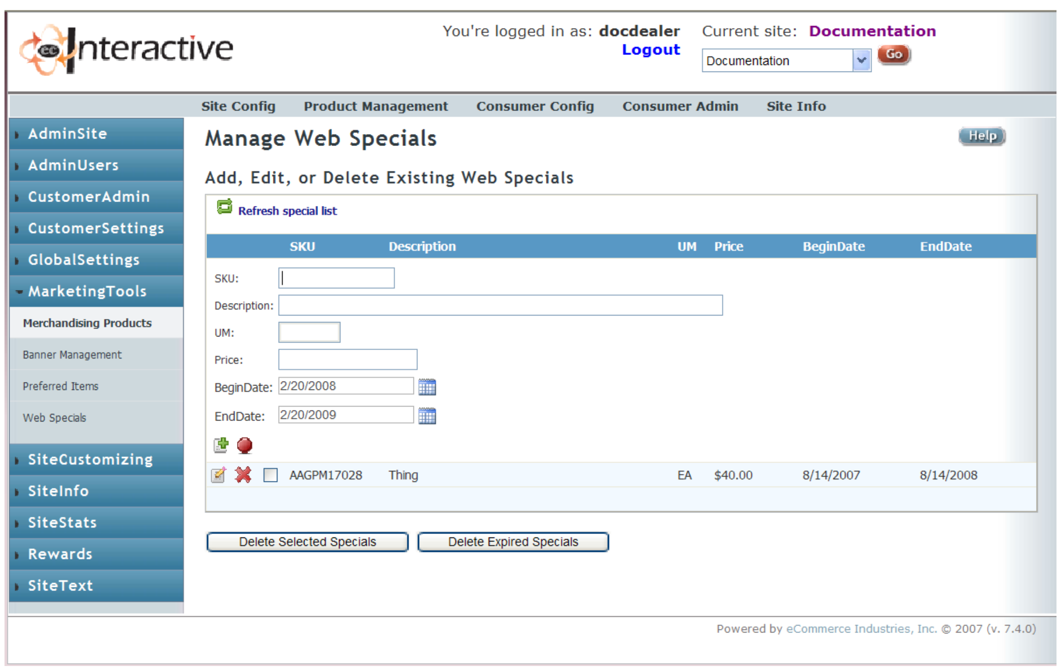
2.2 Click the Description box and enter a descriptive name for this web special. You can enter a maximum of 30 characters.

2.3 Click the Price box and enter the special sell price.

2.4 Click the Begin Date box and enter the date the special begins. You can also forecast dates, if needed. To select a date from a calendar, click . This box defaults to the system date.

2.5 Click the End Date box and enter the date the special ends. You can also forecast dates, if needed. To select a date from a calendar, click . This box defaults to one year in advance of the system date. For example, if the system date is 04/02/08, this box displays 04/02/09.

Figure 15: Adding Web Specials



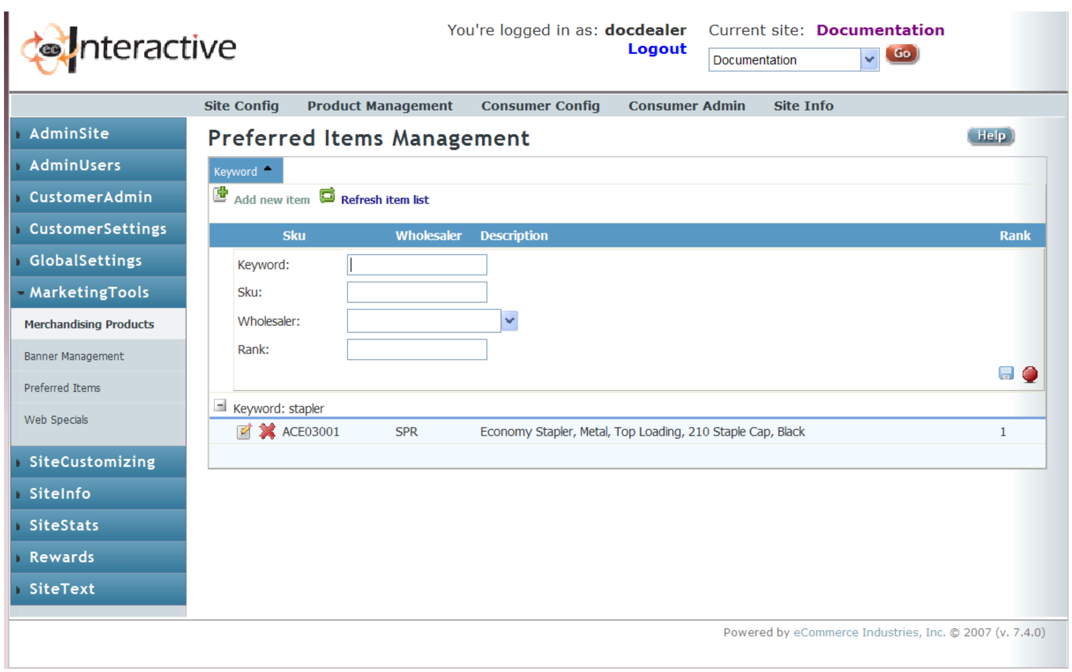
2.6 When finished, click to save the item. A should display for this item to the shopper. If this icon does not appear, the pricing for the shopper is lower than the web special's price.

Preferred Items

You can use this tool to rank items when the shopper performs advanced searches. The item appears in the Best Sellers column in search results. The higher the item rank, the higher the item appears in the product list.

1. Click the Product Management training toolbar and click Preferred Items. You can also click Marketing Tools and select Preferred Items. The Preferred Manufacturer Management page opens.
2. Click Add New Item. See Figure 16.
3. Click the Keyword box and enter a keyword for this item.
4. Click the down arrow in the Wholesaler box. A list of wholesalers available for the item appears along with a description of the item offered by the particular wholesaler beside it. Click a wholesaler to select it.
5. Click the Rank box and enter the sales rank of the item. The higher the item rank, the higher the item appears in the product list.
6. Click .

Figure 16: Adding Preferred Items



Merchandising Products

You can only have one ranking icon at a time.

On the shopper's site, product lists display. This includes the Advanced Search, Contracts, Laundry List and Web Specials pages. You can manipulate the order in which items appear on the product list by assigning them to non-ranking and ranking icons. Both icon types simply represent a group of items that you associate with a specific image. The image you select appears with the item on the shopper's site. Non-ranking and ranking icons differ as to where the items display on the product list. Non-ranking icon items appear in their natural order within the product list and display in the order in which a standard list would place them. Items assigned to a ranking icon display as the first items in the overall product list. You can use .pdf, .xls, and .doc files. Neither .gif nor .bmp files can be used. Images also appear as attributes on the Advanced Search web page.

1. Click Marketing Tools and select Merchandising Products.
2. Click Load Files.
3. Click the Browse button to locate the files to be loaded.
4. Click Load Files.
5. While the page defaults to let you add four files, you can add as many files as necessary. To add more files, click the Add button. To delete files, click the check box corresponding to the file and click the Delete button.
6. To remove an existing file, click the check box corresponding to the file to remove. Click the Remove button.
7. When finished, click Continue.
8. Next, add a new icon to the list. Once the icon is added, you can assign items to it using the following instructions:

   8.1 Click Add New Icon. The Name through Link Path boxes open.

   8.2 Click the Name box and enter a descriptive name for the new icon, Best Deal, for example.

   8.3 Click the Browse button in the Load Icon Image box and locate the image or click the appropriate Default Icon image to use.

   8.4 Click the Is Ranking Icon check box to indicate this is a ranking icon.

Note: Non-ranking and ranking icons differ as to where items display on the product list. Non-ranking icon items appear in their natural order within the product list and display in the order in which a standard list would place them. Items assigned to a ranking icon display as the first items in the overall product list.

8.5 Click the down arrow in the Link Type box and select either File or Href. File refers to one of the files you have loaded while Href refers to linking an icon to a specific URL.

8.6 Click the down arrow in the Link Path box and select the path for this icon. If you selected File, select the file that is to be linked to the icon. If you selected Href, enter the URL to the linked to the icon.

8.7 Click to add the icon.

9 Next, assign an icon to an item and assign it a given rank. The rank indicates how high an item appears in the item list when the shopper searches. Suppose you assign a gel pen a rank of 2 and a ball point pen a rank of 1. When the shopper searches for pens, because you assigned the gel pen a rank of 2, it appears second on the list while the ball point pen appears first. You can also use this page to mass add items to ranking icons. When you mass add, you must assigned the item information to the same ranking icon. You cannot use the All Icons option. In addition, you cannot mass add items to non-ranking icons. The mass add feature only applies when using ranking icons.

9.1 Click Map Products.

9.2 Click the down arrow in the Select an Icon box and choose the icon to assign to the item.

9.3 You can now assign a new item to the displayed icon, including both ranking or non-ranking icons. Or if you are adding several items to a ranking icon, you can click the Quick Edit button to mass add items to the displayed icon. You cannot use the mass add feature with non-ranking icons. The Quick Edit button only appears when you select a ranking icon in the Select an Icon box.

- **To Add Items Individually**: Click Add New Item. Click the Item # box and enter the item prefix followed by the item number, ZEB22210, for example. Click the Rank box and assign the item a number. The number you specify indicates where the item appears in the item list on the shopper's web page. If you leave the Rank box blank, items default to display in alphabetical order. Click to save the information. The item is assigned to the icon and with the rank you specified.

- **To Mass Add Items to a Ranking Icon**: Click Quick Edit. The page refreshes and the cursor moves to the Item # box, as shown in Figure 17. Enter the item number. Click the Rank box and assign the item a number. Press Enter. The cursor moves to the next Item # box so you can continue to assign items and their corresponding ranks. You can click any Item # and rank box to change the information. When finished, click Save. After you click Save, you can re-sort the data. To do so, click the down arrow in the Sort By box and select the method by which to sort, Item #, Rank, or Description. You can sort by ascending or descending order.

Note: The Quick Edit button does not appear if you select a non-ranking item. To view the Quick Edit button, click the down arrow in a Select an Icon box and choose a non-ranking icon.

9.4 You can add as many items to icons as needed. When finished, click Continue.

Note: You can also delete an existing item from an icon. To do so, click. At the Are You Sure prompt, click OK.

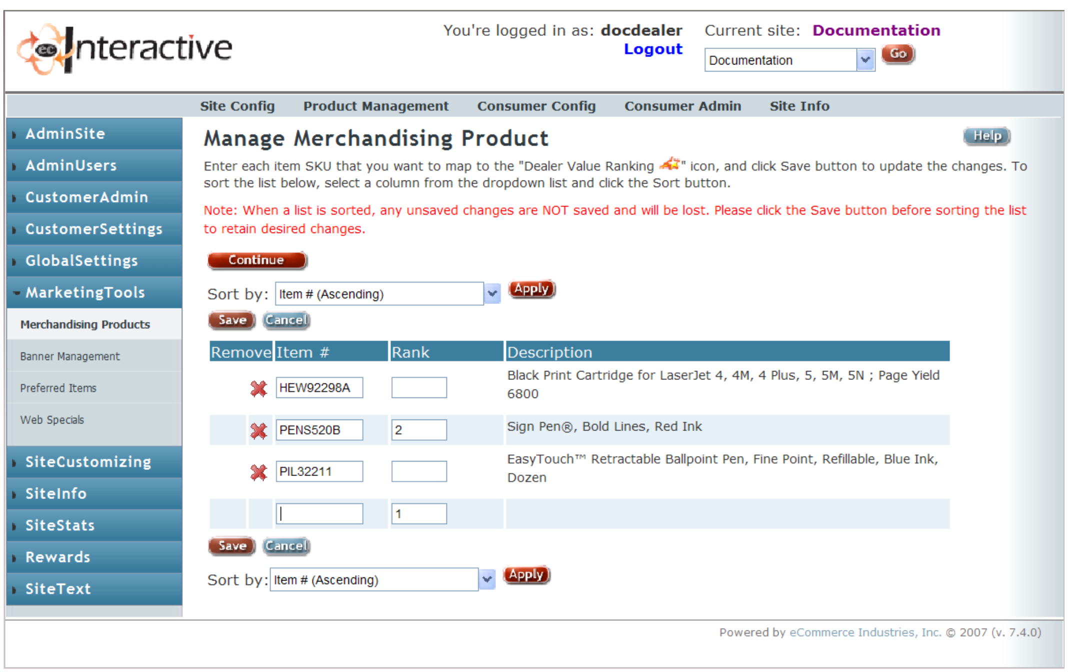


Figure 17: Using the Quick Edit Page When Managing Merchandising Products