ECi USERS CONFERENCE

Empowerment 2008

ECinteractive™
Part II

ECi DDMS®

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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 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.

- Consumer Configuration
- Consumer Administration
- Site Information.

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 Shipping Management web page, you can click the down arrow in the Consumer Config section or click Global Settings and click Shipping Management. See Figure 1.

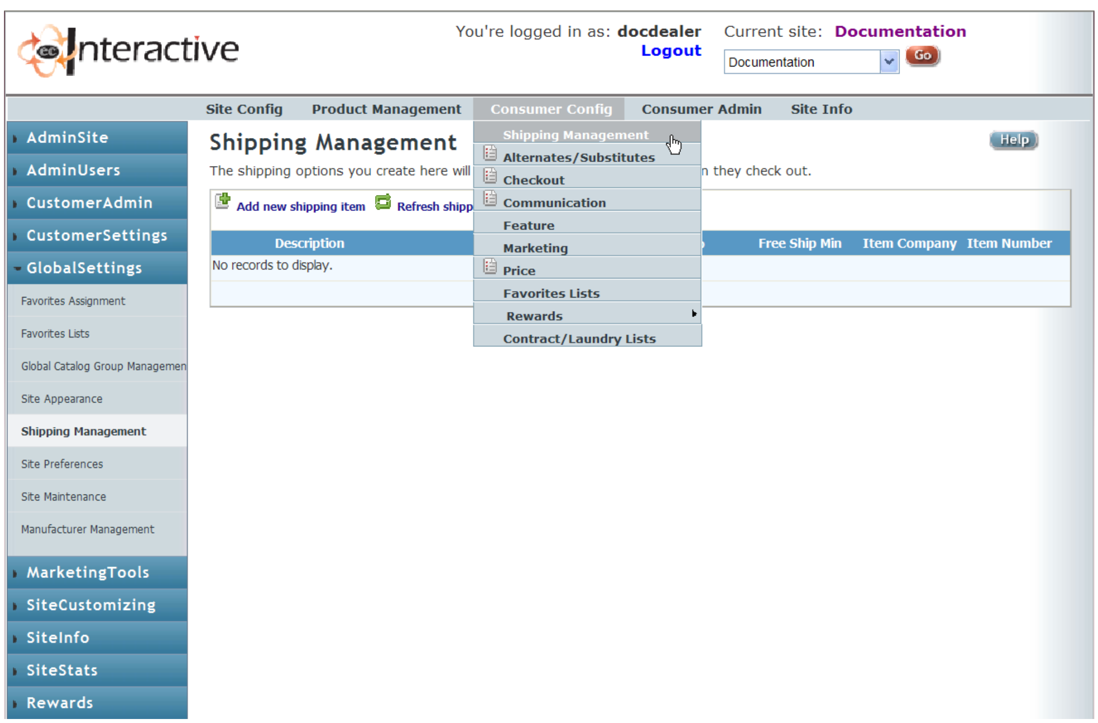


Figure 1: Accessing the Shipping Management Feature using the Consumer Config Drop Down Menu and the Admin Site Left Hand Pane

Consumer Configuration

This section of your administrative web site includes setting up shipping options, customer settings, favorites lists and rewards.

Shipping Management

You can create, edit and delete shipping options that are available to your customers at checkout. The shipping option you add must exist in the back end business system.

1 Click the Consumer Config training toolbar and select Shipping Management. You can also click Global Settings and select Shipping Management.

2 When the Shipping Management web page opens, you can:

Click to edit existing shipping items. Enter the new information over the existing information. When finished, click .

Click to delete shipping items no longer in use. At the Delete This Shipping Item prompt, click OK.

Click Add New Shipping item. To add the item:

2.1 Click the Description box and enter a name for this shipping option. This name displays to the shopper.

2.2 Click the Item Company box and enter the shipper, UPS, for example. The item company you specify must be set up in the back end business system.

2.3 Click the Item Number box and enter the shipping item number. The item number you specify must be set up in the back end business system.

2.4 Use the Flat Rate and Add'l % boxes to indicate how the shipping charge is based.

- Click the Flat Rate box and enter the flat rate you charge for shipping. For example, type 4.95 if you add $4.95 to every order you ship. The maximum rate you can enter is 99.99. Be sure to enter your response using the $.$$ format. See Figure 2.
- Click the Add'l % box and enter a number between 0 and 99. Be sure to enter your response using the %.%% format. The number is applied as a percentage.

2.5 Click the Free Ship Min box and enter the amount an order must meet to receive free shipping. Be sure to use the $.$$ format.

2.6 Click .

Alternate/Substitutes

You can create settings for handling alternate and substitute items. Once you create and name these settings, you can assign them to your shoppers. You can handle alternates using the following options: Normal, Automatic, Ignore, and Blind. While you can change the settings, we recommend you maintain the default alternate and substitute settings.

The Normal Alternate/ Substitute settings let you make changes that can be used to accommodate most of your shoppers. However, you can create additional settings, if needed.

1 Click the Consumer Config training toolbar and select Alternate / Substitutes. You can also click Customer Settings and select Alternate / Substitutes.

2 The Select Setting drop down box defaults to display the New Alt / Sub Setting option. You can add, edit or delete settings.

- To add a new setting, leave the Select Settings box to the New Alt / Sub Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
- To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.
- The Normal setting name has been added for your convenience. To alter Normal settings, click the down arrow in the Select Settings box and choose Normal. *Once you have edited the Normal setting, we recommend you do not make further changes to this setting.* Go to **Step 3**.
- To delete an existing setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK.

Alternate/ Substitute settings cannot be deleted if they are currently assigned to a shopper.

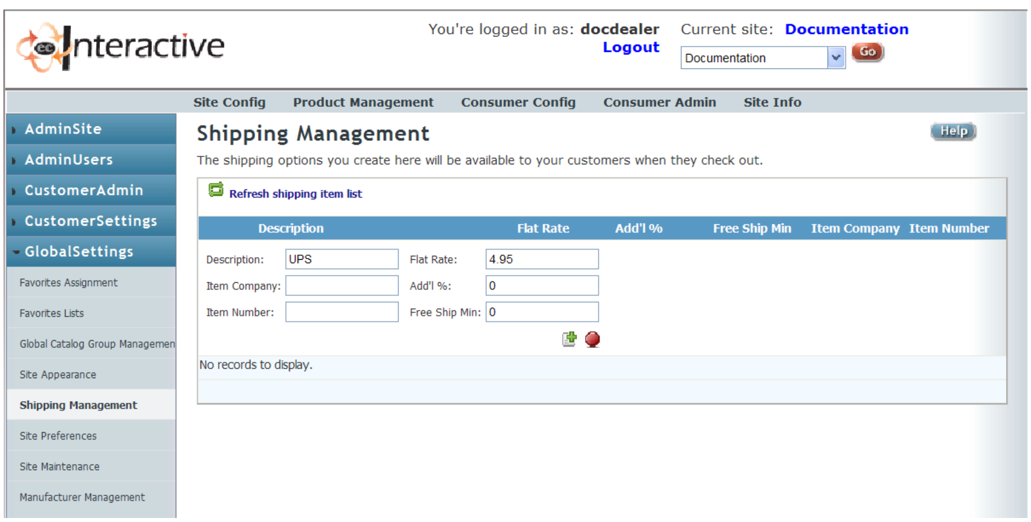


Figure 2: Specifying Shipping Options

For more information concerning the Reference through Like Substitute boxes, see your online documentation.

3 After you select a setting to add or change, click the down arrow in the Reference through Like Substitute boxes and select from the following options:

Automatic: If you select this option, the system automatically adds the alternate or substitute item to the order.

Normal: The shopper is prompted with the replacement item. In most cases, the shopper can continue with the original item. However, in the case of Reference or Discontinued substitute types, if the original item is unavailable; the shopper must choose a substitute item or cancel.

Ignore: If you choose Ignore, the system ignores all substitutes and alternates. The order proceeds with the original item. To turn off Alternate / Substitute functionality for a customer, turn all Alternate / Substitute types to Ignore.

Note: The Ignore setting is not available on Reference and Discontinued substitute types since in those cases the original item is unavailable. If you have set all of the other Alternate / Substitute types to Ignore, we recommend that you set the Reference and Discontinued types to Automatic to limit shopper involvement.

Blind: This option is only available in the Generic Substitute box. Use this option to add the generic item to the shopper's order but display the original item in the shopping cart. For example, if the shopper orders item A, and the item has a generic sub of B, item A displays in the cart even though item B was added to the order. In Order History, the actual item ordered (item B in this example) displays.

4 Check the Only Display Alternates When Price is Lower than Original box to display alternate items only when the item's alternate price is lower than the original item's price. To not use this feature, leave this check box blank.

5 When finished, click Update to save an existing setting or click Save to save a new setting.

Checkout

Use the Managing Checkout Settings page to create and edit checkout settings. Each checkout setting is a collection of checkout options. Once you create and name settings, you can assign them to your shoppers. Checkout settings let you allow or deny access to specific features such as the ability to place credit cards orders and select a different shipping address.

1 Click the Consumer Config training toolbar and select Checkout. You can also click Customer Settings and select Checkout.

The Default Checkout setting lets you make changes that can be used to accommodate most of your shoppers. However, you can create additional settings, if needed.

Checkout settings cannot be deleted if they are currently assigned to a shopper.

For more information concerning the Shipping Options through Invoice Text boxes, see your online documentation.

2 The Select Setting drop down box defaults to display the New Checkout Setting option. You can add, edit or delete settings.

- To add a new setting, leave the Select Settings box to the New Checkout Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
- To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.
- The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. *Once you have edited the Default setting, we recommend you do not make further changes to this setting.* Go to **Step 3**.
- To delete an existing setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK.

3 Click the check box for each feature to enable. Clear the check box to disable it. You can make changes to the Shipping Options through Invoice Text boxes.

4 When finished, click Update to save an existing setting or click Save to save a new setting.

Communication

You use this page to set up communication options. Each communication setting is a collection of parameter settings that control how customers receive communications. Once you create and name these settings, you can assign them to your shoppers.

1 Click the Consumer Config training toolbar and select Communication. You can also click Customer Settings and select Communication.

2 The Select Setting drop down box defaults to display the New Communication Setting option. You can add, edit or delete settings.

- To add a new setting, leave the Select Settings box to the New Communication Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
- To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.

The Default Communication settings let you make changes that can be used to accommodate most of your shoppers. However, you can create additional settings, if needed.

- The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. *Once you have edited the Default setting, we recommend you do not make further changes to this setting.* Go to **Step 3**.
- To delete an existing setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK.

3 Click the check box for each feature to enable. Clear the check box to disable it. You can change settings for each of the following:

Enable Order Confirmation Emails
Enable Order Confirmation Emails to CC Address (list below)
CC Email Confirmation Address.

Communication settings cannot be deleted if they are currently assigned to a shopper.

4 When finished, click Update to save an existing setting or click Save to save a new setting.

Feature

For more information concerning the Enable Order Confirmation through CC Email Confirmation Address boxes, see your online documentation.

Use the Managing Feature Settings page to create feature settings. Each feature setting is a collection of site features. Once you create and name settings, you can assign them to your shoppers. Feature settings let you allow or deny access, such as the ability to view order history or view budget information.

1 Click the Consumer Config training toolbar and select Feature. You can also click Customer Settings and choose Feature.

2 The Select Setting drop down box defaults to display the New Feature Setting option. You can add, edit or delete settings.

The Default Feature settings let you make changes that can be used to accommodate most of your shoppers. However, you can create additional settings, if needed.

- To add a new setting, leave the Select Settings box to the New Feature Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
- To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.
- The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. *Once you have edited the Default setting, we recommend you do not make further changes to this setting.* Go to **Step 3**.
- To delete an existing setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK.

Feature settings cannot be deleted if they are currently assigned to a shopper.

For more information concerning the Feature Setting boxes, see your online documentation.

3 Click the check box corresponding to each feature to enable. Leave the check box blank to disable it.

4 When finished, click Update to save an existing setting or click Save to save a new setting.

Marketing

You can use the Managing Marketing Settings page to create marketing settings. Each marketing setting is a collection of parameters that control what marketing information is displayed. Once you create and name settings, you can assign them to your shoppers. Marketing settings let you allow or deny access such as the ability to view web specials or point rewards.

The Default Marketing settings let you make changes that can be used to accommodate most of your shoppers. However, you can create additional settings, if needed.

1 Click the Consumer Config training toolbar and select Marketing. You can also click Customer Settings and choose Marketing. The Managing Marketing Settings page opens.

2 The Select Setting drop down box defaults to display the New Marketing Setting option. You can add, edit or delete settings.

- To add a new setting, leave the Select Settings box to the New Marketing Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
- To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.
- The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. *Once you have edited the Default setting, we recommend you do not make further changes to this setting.* Go to **Step 3**.
- To delete an existing setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK.

Marketing settings cannot be deleted if they are currently assigned to a shopper.

3 Click the Display Web Specials check box to enable this feature. Clear the check box to disable it.

Rewards programs must be set up before you can select a reward.

4 Click the down arrow in the Rewards Program box and select the appropriate customer rewards program to assign. If this setting does not allow shoppers the benefit of a point rewards program, select the No Rewards Program option.

5 Click the Display Learning Center check box to enable this feature. Clear the check box to disable it.

6 Click the Display Product Showcase check box to enable this feature.

The Default Price settings let you make changes that can be used to accommodate most of your shoppers. However, you can create additional settings, if needed.

7 When finished, click Update to save an existing setting or click Save to save a new setting.

Price

Use the Managing Price Settings page to create price settings. Each price setting is a collection of parameter settings that control how prices are displayed. Once you create and name settings, you can assign them to your shoppers.

1 Click the Consumer Config training toolbar and select Price. You can also click Customer Settings and choose Price.

Price settings cannot be deleted if they are currently assigned to a shopper.

2 The Select Setting drop down box defaults to display the New Price Setting option. You can add, edit or delete settings.

- To add a new setting, leave the Select Settings box to the New Marketing Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
- To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.
- The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. *Once you have edited the Default setting, we recommend you do not make further changes to this setting.* Go to **Step 3**.
- To delete an existing setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK.

For more information concerning the Display List Prices through How Many Numerals to Display After the Decimal boxes, see your online documentation.

3 Click the check box for each feature to enable. Clear the check box to disable it. You can change price settings using the Display List Prices through How Many Numerals to Display After the Decimal boxes.

4 When finished, click Update to save an existing setting or click Save to save a new setting.

While end users can manage the favorites lists they create, they cannot edit or change the favorites you set up and maintain on the Administrative web page.

Favorites Lists

You can create a favorites list to give shoppers easy access to products they purchase frequently. You can assign a favorites list to all shoppers in a department within an account, all shoppers in an account or all shoppers of the entire site. In addition to Favorites lists, shoppers can also maintain their own multiple Favorites lists. They can name or rename them and copy items from one Favorites list to another, as well as specify quantities and delete items or lists as necessary.

1 Click the Consumer Config training toolbar and select Favorites Lists. You can also click Global Settings and choose Favorites Lists.

2 The Manage My Favorites Lists web page opens. In this page, you can:

Click to edit an existing favorites list description, comments or to change the type of favorites list. When finished, click .

Click to delete an existing favorites list. At the Delete This Favorite List prompt, click OK.

Click to copy an existing favorites list. You can add the items from the list to an existing list or you can create a new list. To add the items to an existing list, click the Add check box next to the list. To create a new list, click the Add check box next to the blank List Name box at the bottom of the window.

The favorite list description you specify displays to shoppers when viewing available favorites lists.

Click Add New Favorite List. The Manage My Favorites Lists page opens, as shown in Figure 3. To add the list:

2.1 In the Description box, enter a name for this favorites list.

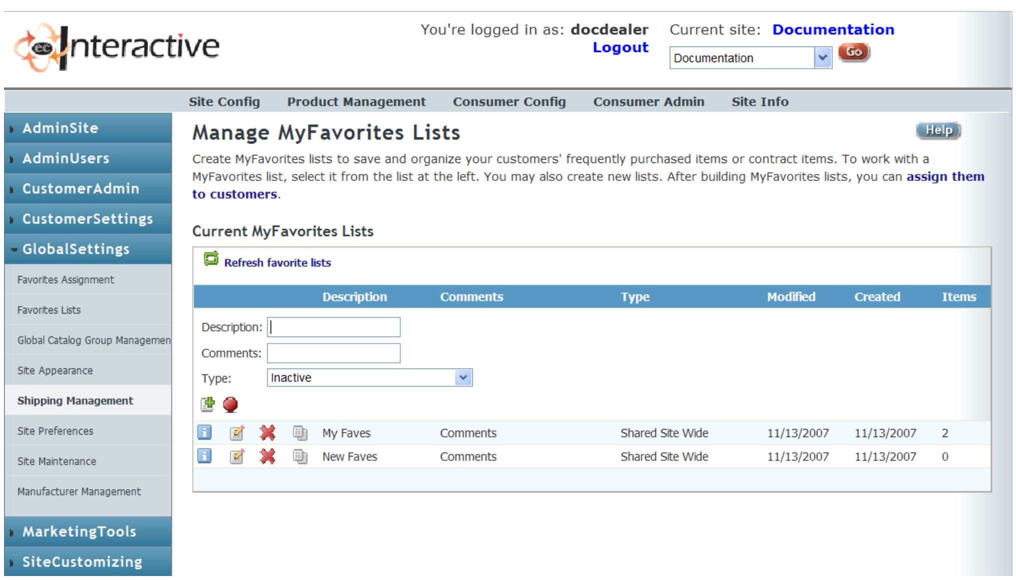
2.2 Click the Comments box and enter a description for the list. Comments display to the shopper when managing favorites lists.

2.3 Click the down arrow in the Type box and choose the appropriate favorites list type. You can select from the following:

Inactive: Click this type to save the list but not allow any shoppers to view it on their web page.

Shared Site Wide: Click this type to assign the list to all shoppers.

Figure 3: Creating a New My Favorites List



Shared With Account/Department: Click this type to assign the list to only specific accounts or departments.

2.4 Click . The new favorites list is added to the Current Favorites Lists.

3 Once the favorites list has been added, you can add items to the new list or view the list. Click beside the list you added.

The item's description comes from the back end business system.

4 In the Edit Items on My Favorites List page, click Add New Favorite Item.

5 In the Item Company box, you can enter the three-digit code for the item company being added, SEL or AVE, for example.

If you set up a favorites list to assign to a specific shopper, you assign the list using the using the Assign Favorites web page. To access this page, you click Global Settings and select Favorites Assignment.

6 Click the Item Number box and enter the number of the item to add. The item number must be set up in the back end business system.

7 Click the Qty box and enter the quantity of this item to order.

8 Click the Comments box and enter a line item comments for the displayed item. These comments appear with the line item on the shopper's web page.

9 Click , as shown in Figure 4.

Note: Click to remove items from the list. At the Delete This Favorite Item prompt, click OK.

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10 Repeat **Step 4** through **Step 9** to add each item to the favorites list.

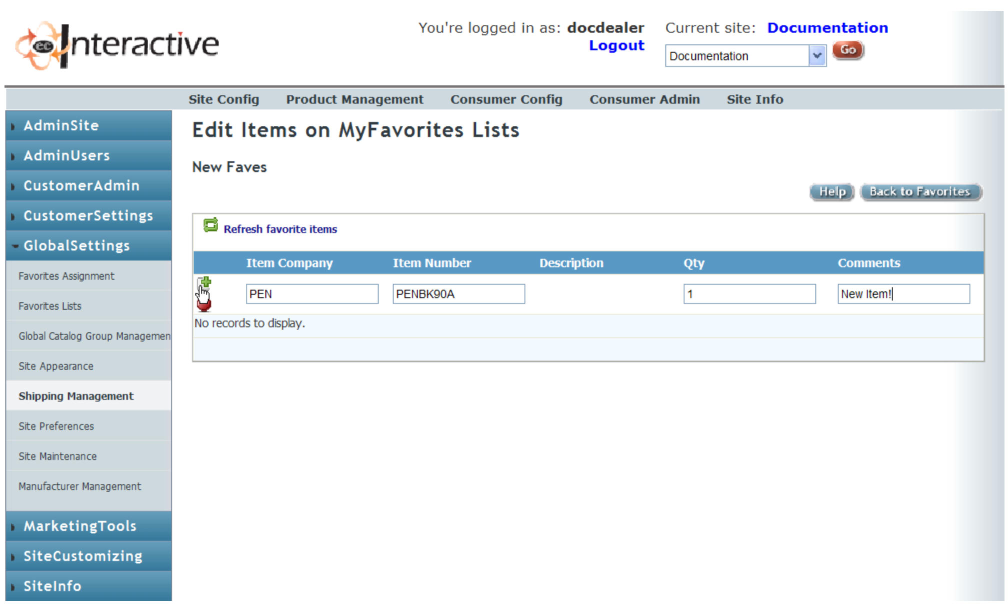


Figure 4: Adding New Items to a Favorites List

11 When finished adding items, click Back to Favorites to return to the favorites lists.

Rewards: Product Management

You can create your own incentive programs that allow shoppers to earn reward points for each dollar spent. Shoppers can use accumulated points to purchase additional products. You have total control over the program including which accounts are eligible, the ratio of dollars spent to points earned and the point value of reward items. You can even set up multiple rewards programs and assign different programs to different groups of shoppers.

You can use the Product Management feature to add reward categories to the product list. You can add as many categories as needed.

1 Click the Consumer Config training toolbar and select Rewards. Click Product Management. You can also click Rewards and choose Product Management.

2 The Rewards Categories page opens. You can:

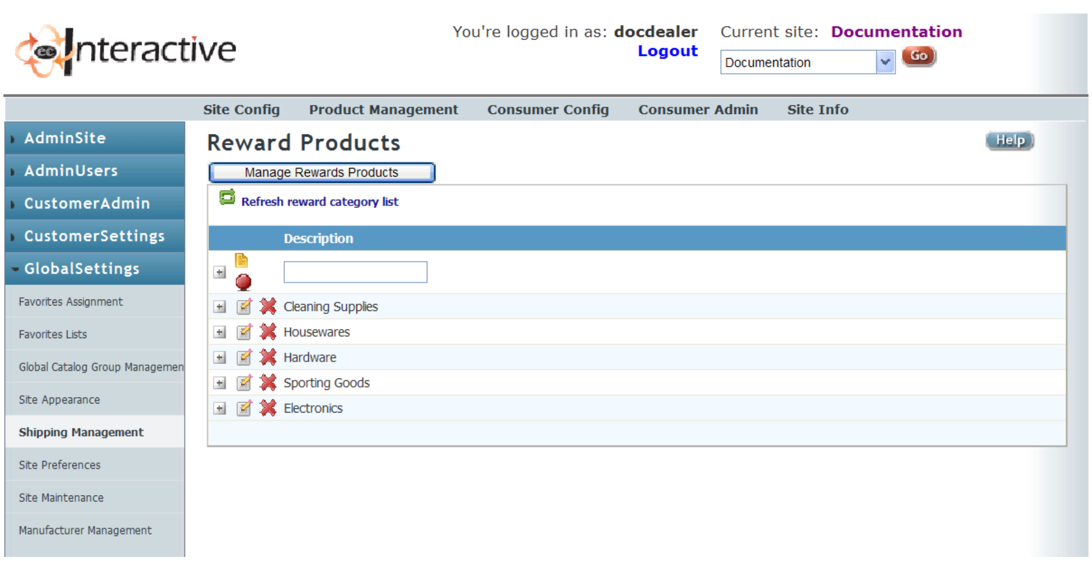
Click to edit existing categories. Enter the new description over the existing description. When finished, click .

Click to delete existing categories. At the Delete This Reward Category prompt, click OK.

Click to the left of the reward category name to view the items within the category. Click to hide the items again.

Click Add New Reward Category.

Figure 5: Adding a New Reward Product Category



2.1 The Rewards Product page opens and the cursor moves to the Description box, as shown in Figure 5. Enter a description for this rewards category.

2.2 Click . The rewards category is added to the list. This category appears to the shopper when clicking the Rewards link in the My Account drop down menu at the top of the web page. You can continue to add as many reward categories as necessary.

Items you add to the reward category DO NOT need to reside in your inventory database in the back end business system.

3 You can now add items to your new reward category. To do so, click Manage Rewards Products .

4 Click Add New Reward Product. To add reward items:

4.1 The page refreshes and the cursor moves to the Point Value box, as shown in Figure 6. Enter how many points the shopper must earn to exchange for this item.

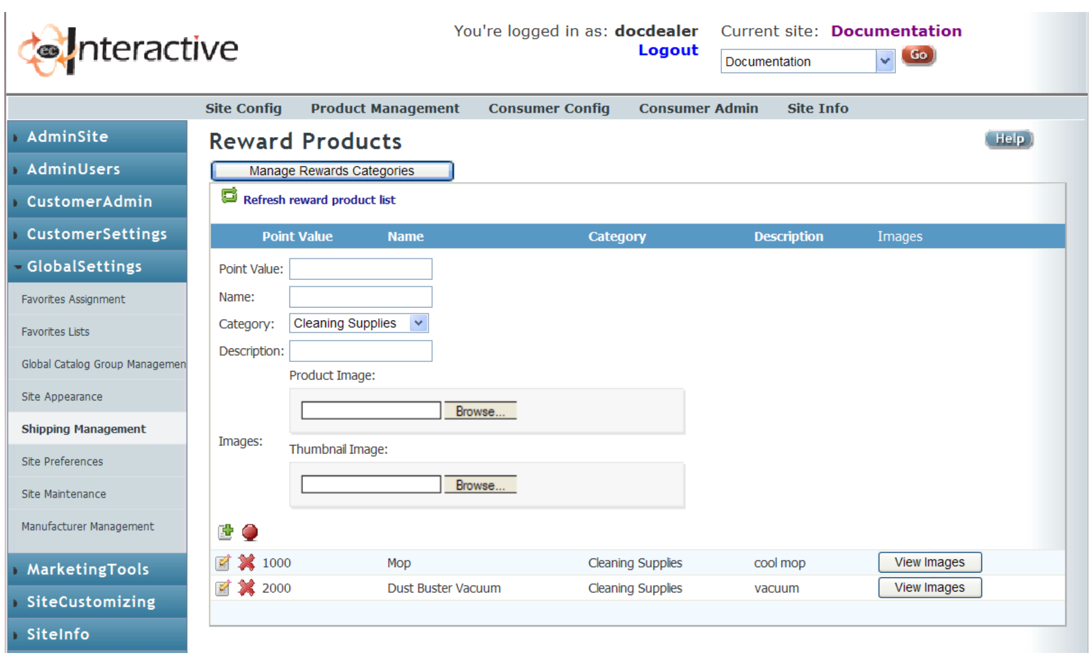
4.2 In the Name box, enter the name of the item.

4.3 Click the down arrow in the Category box to select the category for this reward item. Each reward category you added appears in the drop down list.

4.4 In the Description box, enter a description for the reward item.

4.5 In the Product Image section, click Browse to select a picture of the item, up to 40 kb in size.

Figure 6: Adding a New Item to the Reward Product Category



4.6 In the Thumbnail Image section, click Browse to select a thumbnail sized picture of the reward item, up to 300x300 pixels. This step is optional; it is not required to add the reward item.

4.7 Click to add the item. You can continue to add as many items to the reward category as necessary.

5 Once you have added items to a reward category, you can edit and delete them. You can also view an image of the reward item.

5.1 Click to edit existing reward category items. Enter the new information over the existing information. When finished, click .

5.2 Click to delete existing items from a reward category. At the Delete This Product prompt, click OK. The item is removed from the list.

5.3 To view an item image, click View Images. The item's image appears at the bottom of the page.

Rewards: Program Management

This page lets you add, edit or delete Rewards programs. Rewards programs allow you to set various point to dollar ratios for shoppers' earning of points.

1 Click the Consumer Config training toolbar and select Rewards. Click Program Management. You can also click Rewards and choose Program Management.

2 If you have not entered contact information for the administrator of the Rewards program, you must do so before continuing.

If you have previously set up an administrator for the Rewards program, go to **Step 3**.

To set up an administrator or to edit administrator information, click Manage Administrator:

2.1 Enter the contact information of the person at your location who is responsible for managing the rewards program. Click Save.

All emails concerning the rewards program are sent to the individual shown.

The reward program name you specify appears to the shopper on the Marketing Tools page.

2.2 To edit existing information, click Edit. Enter the new information over the existing information. When finished, click Update.

2.3 Click Continue to return to the Manage Rewards Program page. Go to **Step 3**.

3 Click Add New Program. See Figure 7.

4 In the Name box, enter the reward program's name.

5 In the Ratio Value box, enter the value which enables the shopper to earn points. For example, if shoppers can receive 1/2 point for each $1.00 spent, enter .5 in the Ratio Value box. If shoppers can receive one point for each $1.00 spent, enter 1 in the Ratio Value box.

6 Click the down arrow in the Type box to choose the reward program type. You can select either Account or Customer. Enter your response according to the following:

Account: This reward program requires program administrators. Only program administrators can receive and/or redeem points for purchases made by all shoppers within the customer's account. Using this reward program, you must assign program administrators.

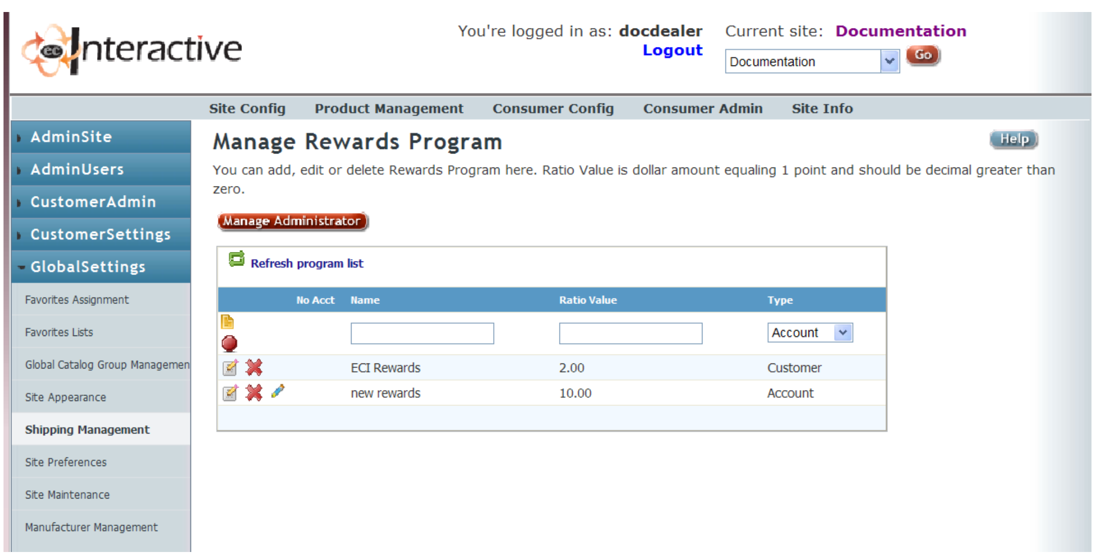
Customer: This reward program can be used by all shoppers regardless of the account number. This type of reward program does not require a program administrator.

7 Click to add the program.

If you added a Customer reward program, set up a marketing setting that uses this reward program. Go to the heading **Rewards Transaction History**.

If you added an Account reward program, go to **Step 8**.

Figure 7: Adding a New Rewards Program



8 On the Manage Reward Program page, click beside the Account-type program to assign an account number and program administrator. The Manage Program Account Association page opens.

9 Click Assign Account and Program Administrators.

While all orders for this account earn points, only the program administrators you select have access to the points.

10 Click the down arrow in the Select Account box and choose the account. A list of available customers for the selected account appear.

11 In the Available Customers box, click each name that can receive and / or redeem points. To select more than one name, hold the Ctrl button and click each name. Click the Forward button to move the name appears in to the Program Administrators box. To remove a name from the Program Administrators box, click it and click the Back button.

12 Click to apply the program administrators to this account-type reward program.

13 Click Continue.

Rewards: Transaction History

This tool lets you view rewards transaction history for account or customer programs. You can also make point adjustments to the account.

1 Click the Consumer Config training toolbar and select Rewards. Click Transaction History. You can also click Rewards and choose Transaction History.

2 The Rewards Transaction page opens and displays all account numbers along with the points earned and points redeemed. See Figure 8.

3 You can limit the information that appears on this page. Click the box by which to limit and enter the limiting information. You can limit by Name, Total Earned and Total Redeemed.

You can set filters for the limit information. For example, you can set a filter to only include information to a specific customer. To set a filter, click the (down arrow) to the right of the box and select a filter by which to limit.

4 To view a detailed report of Rewards Earned, Rewards Redeemed and Debits for an account, click the + to the left of the name. Click – to hide the report again.

5 You can also modify an account's points balance. Click the + beside the name to change. The detailed report displays. Click Add Adjustment.

6 Click the down arrow in the Type box and select Add points or Remove points.

7 Click the Points box and enter the number of points to add or remove.

8 Click the Reason box and enter the reason for the credit or debit to this account.

9 Click to apply this change.

Contract/Laundry Lists

Contracts do not have to be added to display pricing. They let you create special pricing on an item or group of items. A laundry list displays items that a shopper purchases on a regular basis.

1 Click the Consumer Config training toolbar and click Contract/Laundry Lists. You can also click Site Info and select Contract/Laundry Lists.

2 The Contract/Laundry List page opens. You can:

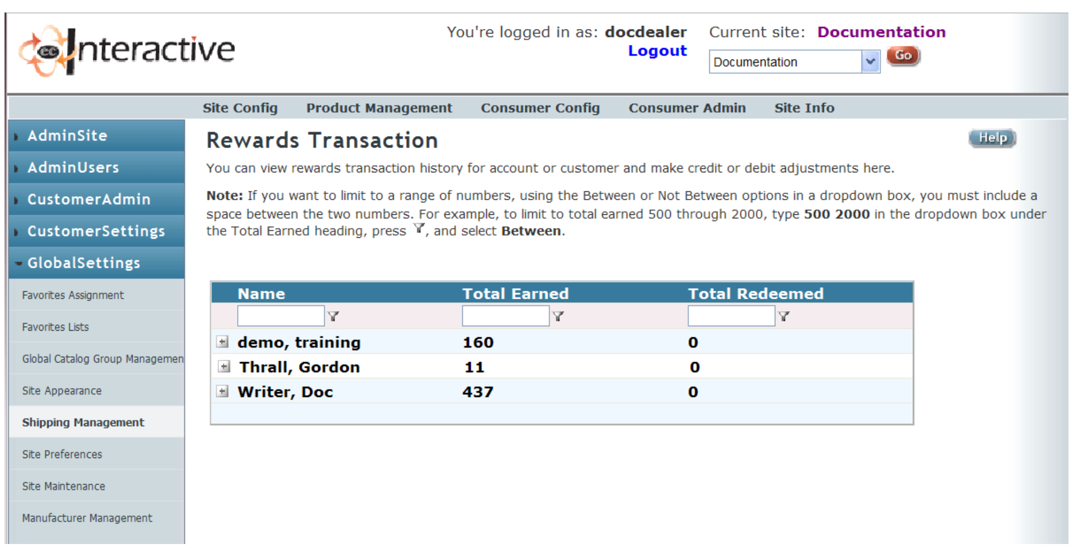
Click to edit existing contracts and/or laundry lists. Enter the new information over the existing information. When finished, click .

Click to delete existing contract and/or laundry lists that are no longer needed. At the Delete This List prompt, click OK.

Click to view the expanded list of the items currently on a contract or a laundry list.

Click Add a New List. The Contract/Laundry List Management

Figure 8: Viewing Rewards Transactions



page opens, as shown in Figure 9.

2.1 Click the List Name box and enter the four-character identifier of the contract or laundry list. The contract you specify must be set up in the back end business system.

Be sure to enter the four-character identifier exactly as it appears in the back end business system.

Note: To use the laundry list feature, the following must be true: the Kit box in the Item Settings tab must be set to M or C. The Company box must be blank. The Option field in the (L1) Terminal and Ticket Parameters screen must be set to B for Bill of Materials.

2.2 Click the down arrow in the List Type box and select either Contract or Laundry List.

After the contract and/or laundry list is added, you must assign it to the shopper for it to appear on the shopper's web site.

2.3 Click the Display Name box and enter the name of this contract or laundry list. The text you specify displays on the shopper's site.

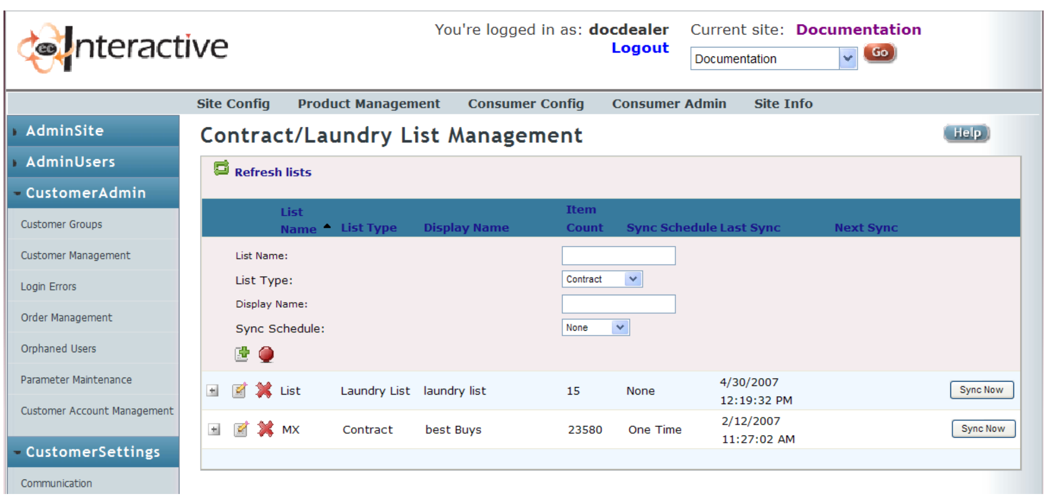
2.4 Click the down arrow in the Sync Schedule box and select the time when the system updates this contract or laundry list. You can choose from Daily, Weekly, Monthly or One Time.

2.5 Click to save your changes. The contract or laundry list is added to the list and the text Backend List Inserted appears.

3 To update the contract or laundry list immediately with information from the back end business system, click the Sync Now button.

4 At the Synchronize This List With Your Backend System Right Now prompt, click OK. The system displays a process bar while the system synchronizes the records.

Figure 9: Adding a New Contract or Laundry List



5 When the process is complete, the text List Successfully Synchronized With Backend System appears. The system also displays the number of items contained within the contract or laundry list you added.

Consumer Administration

This section of your administrative web site helps you manage your customers including adding new shoppers, approval groups, adding guest shoppers, assigning favorites list and making mass changes.

Note: The first option under the Consumer Administration training toolbar is Account Management. You use this web page to add customer account numbers. For more details, see the *ECinteractive Part 1* handout or your online documentation.

Customer Maintenance

Adding shoppers is a three step process.

- First, the customer must exist in the back end business system.
- Next, you add the accounts to your site.
- Last, add the shoppers that can purchase under that account.

1 Click the Consumer Admin training toolbar and select Customer Maintenance, then Adding Accounts. You can also click Customer Admin and click Customer Management.

2 Click Add Record. The Managing Customers: Add page opens. Complete each of the following boxes:

2.1 In the First Name box, enter the first name.

2.2 In the Last Name box, enter the last name.

2.3 In the Phone box, enter the phone number.

2.4 In the Phone Extension box, enter the phone number extension, if applicable.

2.5 Click the down arrow in the Default Account box and select the account to use.

Note: If the customer account number is not available, click Add New Account. For details concerning adding new accounts, see the *ECinteractive Part 1* handout or your online documentation.

2.6 Click the down arrow in the Default Department box and select the department to use. If the account you selected does not have departments, you must assign the Blank Department. The Blank

Department represents the master account on the back end business system. You must sync departments for the account even though departments do not exist.

2.7 Click the Attention box and enter the attention's name to use. An attention is the person or cost center to whom an order is going. To select more than one attention, hold down the Alt key and click the down arrow in the Attention box to select the default attention this customer uses when placing orders. To use this feature, this customer must be set up with attentions on the back end business system.

2.8 Click the UserName box and enter a unique name. This is the name that the shopper enters in the User Name box when logging into the Home page.

2.9 Click the Password box and enter the password. This is the password that the shopper specifies in the Password box when logging into the home page. Be sure to enter at least six alphanumeric characters. The first time they log into the site they are required to change the password. However, they can retain the same password, if needed. Once the password is specified, they are prompted to choose a security question and response. To successfully reset their password, they must know the security response they selected.

2.10 Click the Confirm Password box and enter the same password you specified in the Password box.

2.11 Click the Email box and enter the email address to which to send an email confirmation.

2.12 In the Send Confirmation Email box, indicate whether to send an email confirming the shopper has been properly set up. Check this box to send a confirmation email.

2.13 Click the down arrow in the Alt / Sub through Communication boxes to select the user groups to use.

3 Click the Contract / Laundry Lists tab to assign contracts and / or laundry lists to this user. Click each box to assign.

4 Click the Parameters tab.

4.1 To lock this shopper to only the catalogs you specify, check the Lock Customer to Selected Catalogs check box.

4.2 To enable this shopper access to the HP Purchase Edge feature, check the HP Purchase Edge box.

4.3 If this shopper requires that orders be submitted to a different general ledger or inventory location or to a different printer, click the GL, Inv and Printer boxes and specify the information.

4.4 Select the global and custom catalogs this shopper can access. Click the down arrow in the Global and Custom boxes and choose the appropriate catalogs.

5 When finished, click Save. You can continue to add as many shoppers as needed.

6 Once a shopper is added, you can change the information. You can also delete or unlock a shopper's account and reset the shopper's password. Click Search. The Customer Search Page opens. You can:

Click corresponding to the shopper to change. When the Managing Customers Edit page opens, click Edit to make the necessary changes. When finished, click Update.

To automatically reset the shopper's password, click Reset Password.

To manually change the shopper's password, click Change Password. To manually change the password, you must know the shopper's security question and answer.

Click Authorize Credit Card to assign credit card settings for this shopper. When the Credit Card Payment Options page opens, select one of the following options for the selected shopper:

- **Do Not Allow Credit Card Selection:** This option does not allow the shopper access to the Credit Card Editor web page. On the Checkout page, the shopper can specify to receive an invoice for the order, use the default credit card assigned to the displayed account and department, or enter a personal credit card.
- **Select From Enter Backend Credit Card List:** This option allows shoppers to select from a list of all the credit cards associated with the displayed account and department. On the Checkout page, a drop down list of credit cards appears for the shopper to choose the card to use for the order.
- **Restrict to a Dealer Assigned Sub-Set of Credit Cards:** This option lets you restrict the shopper to only those credit cards you select. The system displays two additional tabs: All Credit Card List and Credit Card Restriction List. Click to the left of the account. Click corresponding to the account for which to restrict cards. See Figure 10. When the cards display in the All

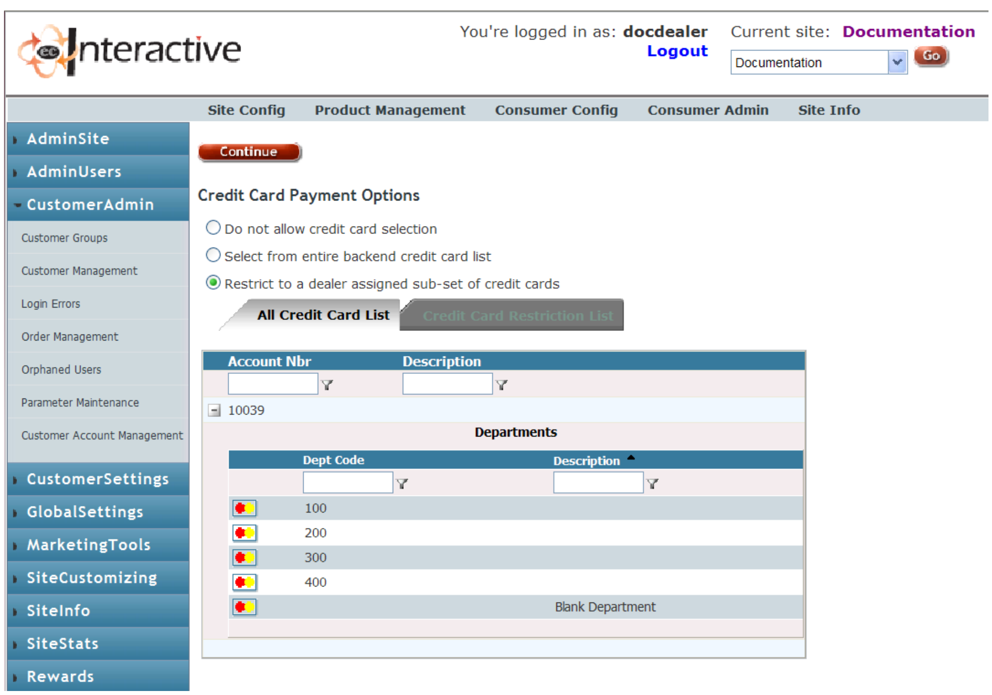
Credit Card List tab, check each box beside the credit card this shopper can access on the Checkout page. When finished, click [save icon]. The Credit Card Restriction List tab lets you view the cards to which this shopper is restricted. If you specify to restrict this shopper to only the credit cards you select, the shopper cannot add a new credit card on the Credit Card Editor web page.

Click Authorize Account to assign only certain departments from your customer's accounts to a particular shopper. You can add a new account or delete the existing account.

- To add a new account, click Add New Record. In the Available Departments box, click the department to highlight it and click the Forward button. The account moves to the selected departments list. Click Insert.
- To delete the information, click Delete.

Click [delete icon] to delete existing shoppers that no longer require access. At the Are You Sure prompt, click OK. (Once deleted, all the shopper's history is also deleted. This applies even if you later recreate the shopper using the same username and password. Since order history resides on the back end business system, this information can still be accessed after the shopper is deleted.)

Figure 10: Authorizing Credit Cards



Click to unlock the shopper's account. If a shopper is locked, a check mark (✓) appears in the Locked Out column. Accounts are locked after several unsuccessful attempts to log in.

Click to reset a shopper's password. You do not need to know the user's security question and answer.

Currently, only one group of top level approvers can exist for each customer number.

7 When finished, click Continue.

Approval Management: Approval Groups

You can set up individuals to approve orders. When an order exceeds a certain amount, you can require that the order be approved after it is submitted. For example, orders less than $200 may not require approval but orders exceeding $200 must be approved. When an order requires approval, an email is sent to the approver you select. The order must be approved before it can be processed. To effectively use this feature, you set up approval groups.

1. Click the Consumer Admin training toolbar and select Approval Management, then Approval Groups. You can also click Customer Settings and click Approval Management, then Approval Groups.
2. Click Add New Approval Group.
3. Click the down arrow in the Select Account box and select the account number to assign this group.
4. When you set up approval groups for the first time, you must have a top level approval group before adding additional customer or departmental approval groups. Therefore, the system automatically assigns the Customer Approval Group type.
5. Click the Description box and enter a description for this top level approval group.
6. Click Next. The Managing Approval Group Add page opens listing the available shoppers for the account you selected.
7. Use this page to assign available shoppers to be the top level approver for this group. You can assign more than one shopper but you must choose at least one. If necessary, you can click the down arrow in the Get Customer by Department box to further limit the displayed shoppers in the Available Users box.

Note: When assigning top level approvers, it is important to remember that this approver is at the highest level of responsibility for approving orders. If this individual is out of the office for any reason, vacation, for example, orders requiring his approval are not processed until he can approve them.

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8 In the Available Users box, click the name and click the Forward button. See Figure 11. The name moves to the Selected Users box. This is the assigned top approver responsible for approvals in this group. You can continue to add as many top approvers as needed.

9 When finished, click Next.

10 The Approval Setting page opens. You use this page to set limits for the approval group. Since this is a top level approval group, the only limit that can be set is the Email CC Address on Approval Emails box. The remaining limits are disabled.

You can use this box to copy an individual on approval emails. Click the box to enter the individual's email address. This person is also notified when the approver receives the email.

11 Click Next. The No Approvers text appears. Since you are setting up a top level approval group, this page is blank.

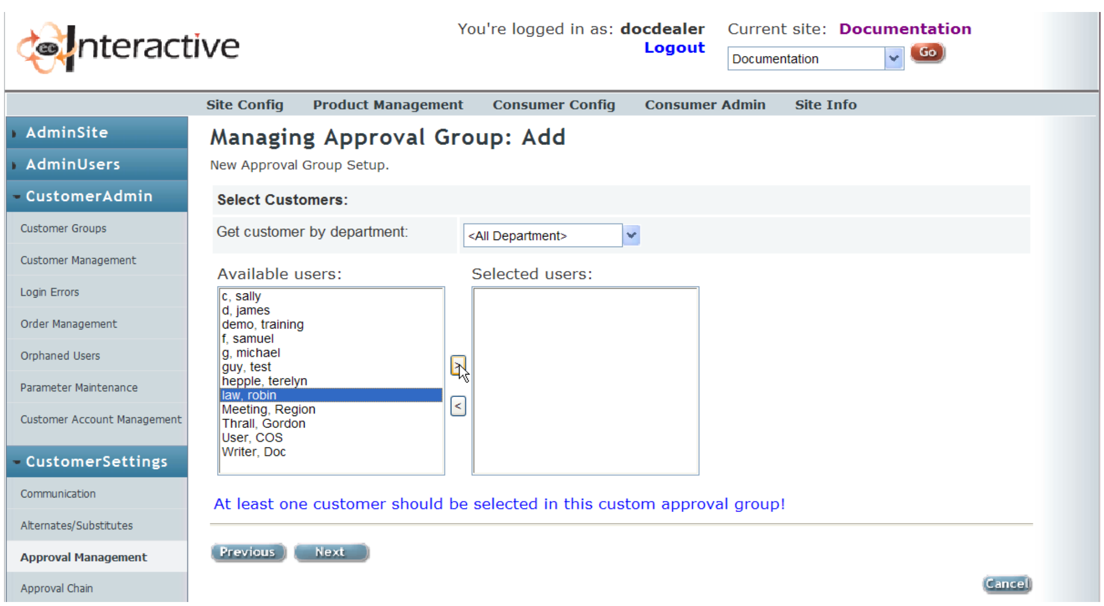
12 Click Save.

13 To assign individual shoppers to an approver, click the down arrow in the Select Account box and select the account number.

14 Click the Customer Approval Group option.

15 Click the Description box and enter an approval group description.

Figure 11: Selecting an Approval Group User



16 Click Next.

17 Click the names of the shoppers from the Available Users list and move them to the Selected Users list.

18 Click Next.

19 Select the limits for this approval group. You can use the Authorized Dollar Limit through Email CC Address on Approval Emails boxes.

20 Click Next.

21 Choose the group that acts as the approver for the shopper's orders.

22 Click Save.

23 To assign all department orders to an approver, click the down arrow in the Select Account box and choose the account number.

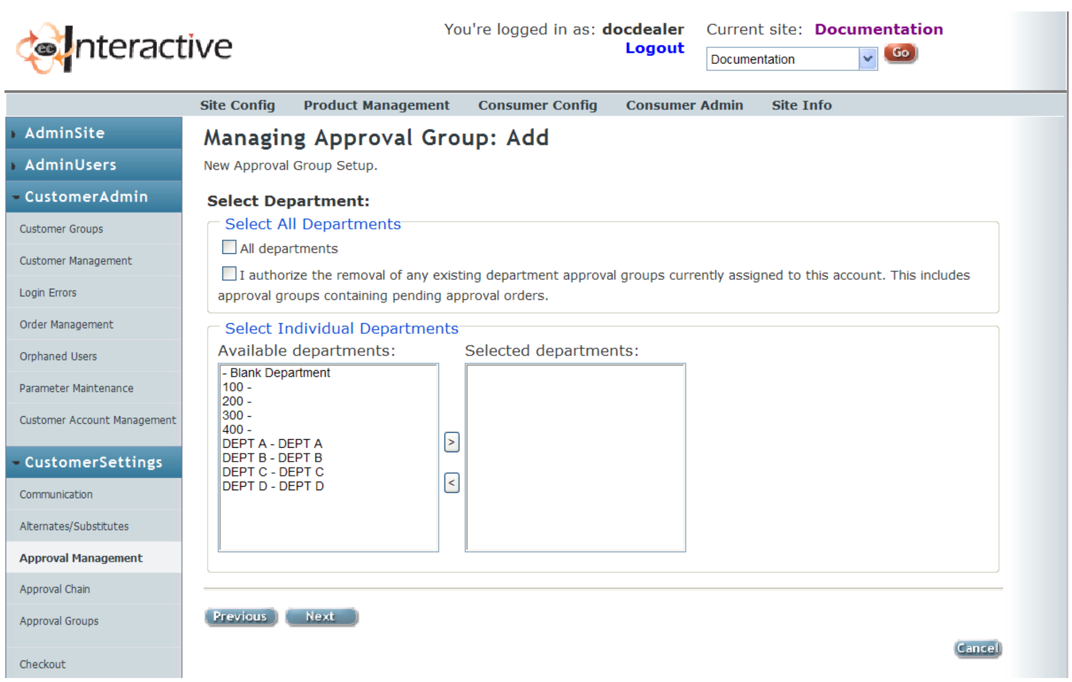
24 Click the Departmental Approval Group option.

25 Click Next. The available departments appear, as shown in Figure 12.

26 You can select individual departments to add to this group or you can select all the departments.

- To select all the departments, click the All Departments check box.

Figure 12: Selecting Approval Group Departments



- To select specific departments, click the department in the Available Departments box and click the Forward button. To select more than one, hold down the Ctrl key and click each department. Then, click the Forward button to move them to the Selected Departments box.

27 Click Next.

28 The Approval Settings page opens. Specify approval setting limits for the department group. You can use the Authorized Dollar Limit through Email CC Address on Approval Emails boxes.

29 Click Next.

30 The Available Approvers page opens. Choose the group that acts as the approver for the department's orders.

31 Click Save.

32 In addition to adding approval groups, you can edit and delete.

Click to make changes to existing approval groups. Enter the new information over the existing information. When finished, click Save.

Click to view the approval chain of an existing approval group.

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

Note: If a top level approval group does not have any attached customer or department groups, you can immediately delete it. However, if the top group has child customer or department groups, you must manually delete each child group first before deleting the top group. The system indicates which groups can be deleted by displaying the beside the approval group. Those groups not displaying an cannot be immediately deleted.

Approval Management: Approval Chain

This web page lets you view the approval chain you have set up. To make changes, you must do so using the Approval Group page.

1 Click the Consumer Admin training toolbar and select Approval Chain. You can also click Customer Settings and select Approval Management. Then, click Approval Chain.

2 Click the down arrow in the Account box and select an account. The current approval chains list appears. See Figure 13.

Edit Guest Customer

You can specify default settings for guest shoppers. It is important to remember that guest shoppers cannot checkout. They must first create an account online prior to placing an order. Order entry information for the guest shopper's account in the back end business system's customer database including tax and discount settings are not copied to the new account number in the customer database. We recommend testing the guest shopper checkout option on the shopper's web page before allowing guest shopper access.

1 Click the Consumer Admin training toolbar and select Edit Guest Customer. You can also click Customer Admin and select Customer Management. Then, click the Edit Guest Customer button.

2 The Managing Customers: Edit page opens. Click Edit.

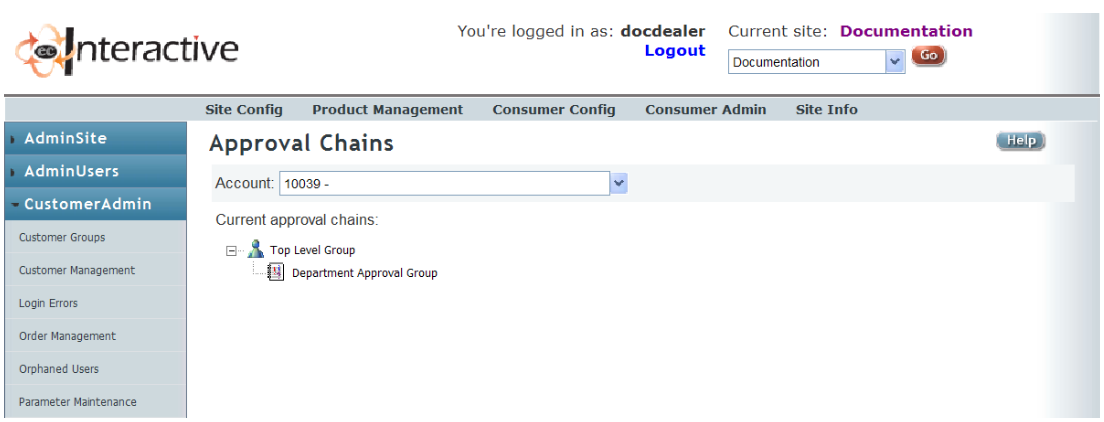
3 Make appropriate changes to the Customer and Parameters tab. When you do, be sure:

- The default account exists in the back end business system.
- You specify the correct User Grouping settings for this guest shopper. The user grouping settings you select are used as a template for all the guest shoppers who create an account online.

4 When finished, click Update.

Note: When shoppers click the Register Me option on their Home page, the system automatically assigns the shopper the global and custom catalogs you set up for the guest account.

Figure 13: Viewing the Approval Chain



Favorites Assignment

In addition to setting up favorites lists that can be viewed by all your shoppers, this feature lets you assign a list to specific shoppers. You can assign favorites lists to the shopper's account or to the department. This page also lets you delete favorite lists assigned to accounts and departments.

1. Click the Consumer Admin training toolbar and click Favorites Assignment. You can also click Global Settings and select Favorites Assignment. The Assign Favorites page opens.
2. Click the down arrow in the Assign Favorites List box and click the list to assign.
3. Assign the list to an account or to a department.

   To assign the list to an account, click the To Account option. Click the down arrow and select the account number.

   To assign the list to a department, click the To Department option. Click the down arrow in the To Account box and select the account that contains the department. When the correct department appears, click the department to highlight it.
4. Click Assign. The system displays the list you added in the Assigned Favorites List section of the page.
5. To delete a favorites list from an account or department, click beside the list to delete. At the Delete Favorites Assignment prompt, click OK. The list is removed and no longer appears on the shopper's site.

Account News

This page lets you assign information you have created using the Text Editor so it displays on the shopper's web page. For example, you can create a custom page and assign it to one shopper or several. This is a helpful tool when advertising specific information to selected shoppers. The shopper views the information you set up on this page by selecting the News option from the My Account drop down menu.

1. Click the Consumer Admin training toolbar and click Account News. You can also click Site Text and select Account News. The System News page opens.
2. To view page detail, click the down arrow in the Available Pages box and select the page to view.
3. Click . The Page Content box opens at the bottom of the page.

You cannot select the shoppers within an account to mass change. This is an all or nothing mass change feature; any changes made affect all displayed shoppers. To make changes to individual shoppers within an account, use the Parameter Maintenance web page.

4. When you are ready to assign a page to a specific account or department, click the down arrow in the Available Pages box to select the page to assign.
5. To assign text to an account, click the account in the Available Accounts box. To select more than one account, press Ctrl and click each account to highlight it.
6. Click Add. The account and its assigned page are added to the Accounts Assigned box.
7. To delete a page assigned to an account, click the down arrow in the Available Pages box to select the page to remove. Click the account in the Assigned Accounts box and click Delete. The account is removed.

Mass Setting Management

Your customer's experience is completely based on parameters you set. For example, you may allow one customer to place credit card orders while another cannot. One may be allowed to view budget information but a different customer is denied. Managing individual parameters for hundreds of customers can be overwhelming. To help you more effectively manage your customer settings, we developed the mass setting maintenance page. This page lets you toggle the feature for the entire account or department, turning it on and off for dozens of shoppers at once.

You cannot set limits for the shoppers that appear in the Customer List box. Any change made affects all the shoppers shown.

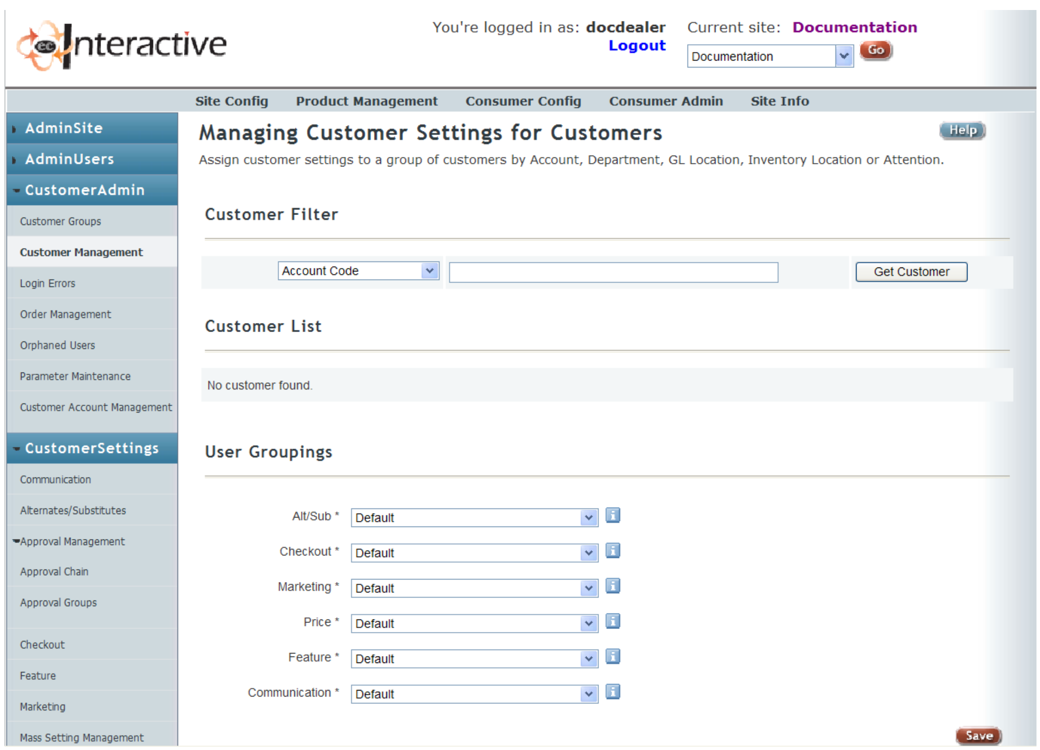


Figure 14: The Managing Customer Settings for Customers Web Page

1 Click the Customer Admin training toolbar and click Mass Setting Maintenance. You can also click Customer Settings and select Mass Setting Management. The Managing Customer Settings for Customers page opens, as shown in Figure 14.

2 Click the down arrow in the Customer Filter box and select the category by which to search. You can search by Account Code, Department Code, GL Location, Inventory Location or Attention.

3 In the corresponding box, enter the criteria by which to search. For example, if you select Department Code in the Customer Filer box, you could enter Acct for Accounting.

4 Click Get Customer. All customers that meet the limits you set appear in the Customer List box.

5 Click to the left of the account to view a list of shoppers associated with the account. Click to hide the users again.

6 In the User Groups section, click the down arrow in the Alt/Sub, Checkout, Marketing, Price, Feature and Communication boxes. Select the settings to use.

Note: To view details for a user group setting, select it from the drop down menu and click . A list appears to the right of the drop down menu.

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7 When finished, click .

Customer Groups

The customer group tool is used to migrate your end users. Training concerning this tool must be completed before using this feature.

Customer Account Management

This page lets you view the customers that have been assigned to specific accounts, departments and attentions. Using this feature, you can mass change your customer settings without changing them one by one. For example, you can use this page to move some or all of the customers assigned to one account to a different account.

1 Click the Customer Admin training toolbar and click Customer Account Management. You can also click Customer Admin and select Customer Account Management. The Managing Customer Accounts page opens.

2 Click the down arrow in the Choose an Account box and select the account number.

3 Click Search. The Loading Customers message appears. The customers associated with the account number you selected appear under the heading Update Customers. See Figure 15.

4 You can now change the settings for all the customers shown or you can set limits for the customers to change.

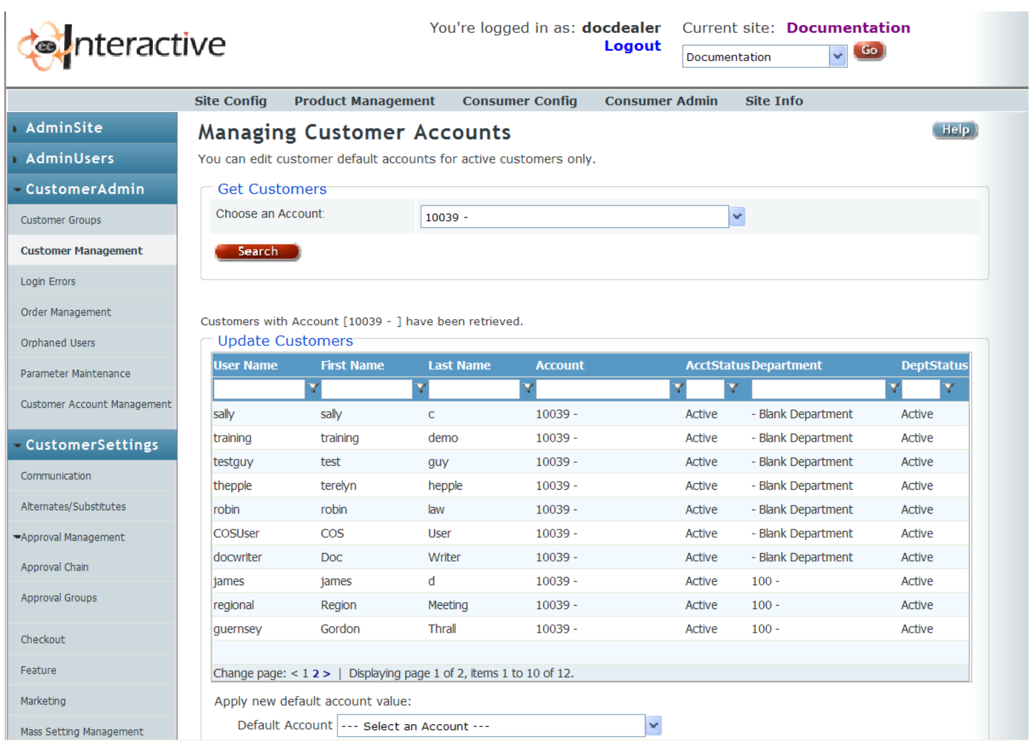
To change the settings for all displayed customers, go to **Step 5**.

To limit the customers shown, click the User Name through Dept Status boxes and specify the information by which to limit. To retrieve all customer accounts containing the word Office, for example, click the User Name box and type Office. Then, select the to the right of the Name box and choose Contains. The system limits the information to include only those records where the word Office appears — Office Warehouse Supply, Warehouse Office Supply or Supply Warehouse Office. To clear a limit, click the to the right of the box and select No Filter.

5 After you select the customers, you can change the Account, Department and / or Attention.

To change the account, click the down arrow in the Default Account box and select the default account to use.

Figure 15: Viewing the Update Customers List



To change the department, click the down arrow in the Default Department and select the default department to use.

To change the attention, click the down arrow in the Attention box and select the default attention to use.

6 When finished, click Apply.

7 At the Are You Sure prompt, click OK.

Parameter Maintenance

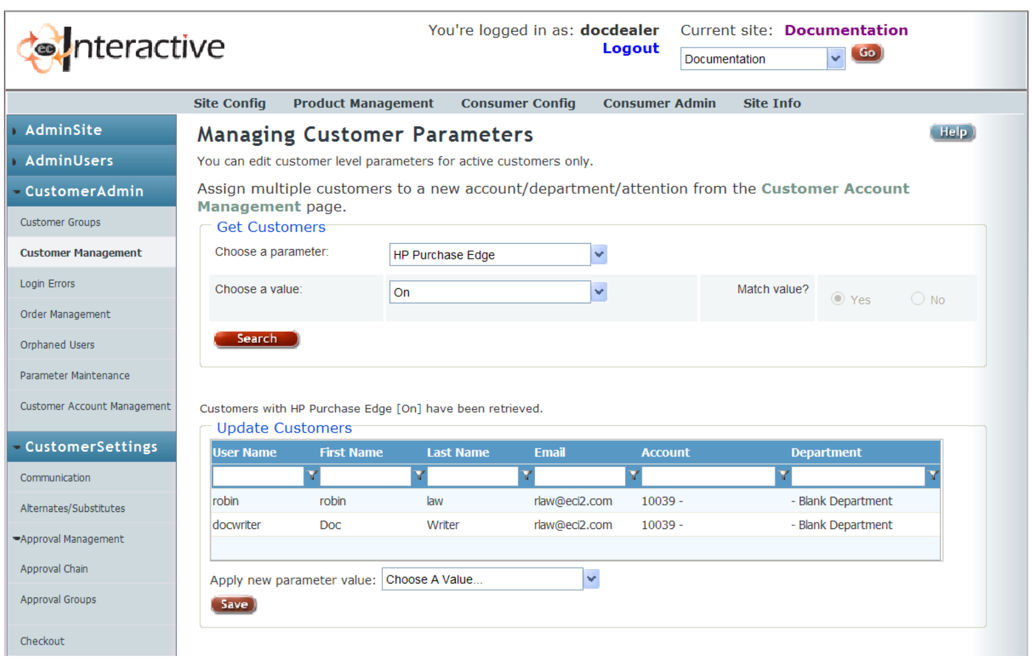
This page lets you view the customers that have been assigned specific parameters. You can use this page to change some or all of your customers to use a different parameter setting. For example, you can view the customers that have been allowed to use the HP Purchase Edge feature. You can then toggle that setting on or off for these customers.

1 Click the Customer Admin training toolbar and click Parameter Maintenance. You can also click Customer Admin and select Parameter Maintenance. The Managing Customer Parameters web page opens.

2 Click the down arrow in the Choose a Parameter box and select a parameter, Global Catalog, for example.

3 Click the down arrow in the Choose a Value box to choose the setting for the parameter you selected, United Stationers Catalog, for example.

Figure 16: Changing Parameter Settings



4 In the Match Value box, click Yes to view a list of all customers with the parameter setting you specified. Click No to view a list of customers who do not have the parameter setting you selected.

5 Click Search. The Loading Customers message appears. If any customers match the criteria you specified, they appear in the Update Customers box, as shown in Figure 16.

6 You can now change the setting for all the customers shown or you can set limits for the customers to change.

To change the parameter setting for all displayed customers, go to **Step 7**.

To limit the customers, set filters to include only the customers to change. You can narrow your list by the customer's user name, first name, last name, email address, account number or department. Click the down arrow in the box by which to limit and enter the limiting information.

You can set filters to limit the information displayed on this page. For example, you can set a filter to only include orders limited to a specific dollar total amount. To set a filter, click to the right of the box and select a filter from the drop down box.

7 Click the down arrow in the Apply New Parameter Value box and choose a new parameter setting for the displayed customers, United Stationers Selected Catalog, for example.

8 Click Save.

9 At the Are You Sure prompt, click Yes. A message appears displaying the number of customers that were updated with the new parameter setting you selected.

Site Information

This section includes information for your User / Usage reports as well as your order management feature. You can also use this section to view login errors and a list of orphaned users.

User Usage Reports

You can use this page to generate a report of the activity of all of the users who fit the entered search criteria. You can download this report as an Excel spreadsheet or PDF document.

1 Click the Site Information training toolbar and select User Usage Reports. You can also click Site Stats and select User Usage Reports.

2 You can now set limits for the information shown on the report. Click the box by which to limit and enter the limiting information. You can limit using the First through Order Total Last Month boxes. You can also set filters for the limit information. For example, you can set a filter to only include orders limited to a specific date. To set a filter, click the down arrow to the right of the box and select a filter from the drop down box.

4 Click the down arrow in the PDF Document box to select the report format. You can choose Excel Spreadsheet or PDF Document. Click the appropriate option.

5 Click Generate Report. Make sure your browser is set to allow downloading from this web site. If given the option, save the file to your computer so you can sort and edit the data.

Order Management

Use the Order Management page to report on order history. This page lets you view the status of all submitted orders. You can also use this page to delete and transfer orders that are currently in the shopper's cart or which are saved orders. You can only delete or transfer orders to customers who belong to the same account. When you delete the order, it no longer appears on the shopper's web page. This is an especially helpful tool if a shopper leaves the company with pending orders or approvals.

Note: You cannot transfer orders between shoppers assigned to different accounts.

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1 Click the Site Information training toolbar and select Order Management. You can also click Customer Admin and select Order Management. The Order Management web page opens.

2 You can use this initial page to limit the orders by date range, order number or account number. If you decide not to set limits, click Retrieve Orders and go to **Step 5**.

- To limit by date range, click the first Status Range Date box and enter the beginning date in the range. Click the corresponding box and enter the ending date in the range. If you cannot recall the date, click to open the calendar and select the date. This is the date the status changed for the order.
- To limit by order number, click the Order Number option. Enter part or all of the order number by which to search in the corresponding box.
- To limit by customer account number, click the Account option. Click the down arrow in the Account box and select the account by which to search.

3 Click Retrieve Orders. The page refreshes and the orders display according to the limits you specified. See Figure 17.

4 After the page refreshes, you can further limit the orders to view. After each limit you set, the page refreshes to display the new records.

To limit by order status, click the down arrow in the Order Status box and select the type of orders on which to report.

To limit using the First Name through Status Date boxes, click each box and enter the limit by which to search. Then, click and select the filter. You could filter to include only specific departments starting with the number 1, for example.

Note: If you limit to a range of numbers, you must include a space between the two numbers. For example, to limit to account numbers 1005 through 1099, you would type 1005 1099 in the Acct box. Then, click and select Between.

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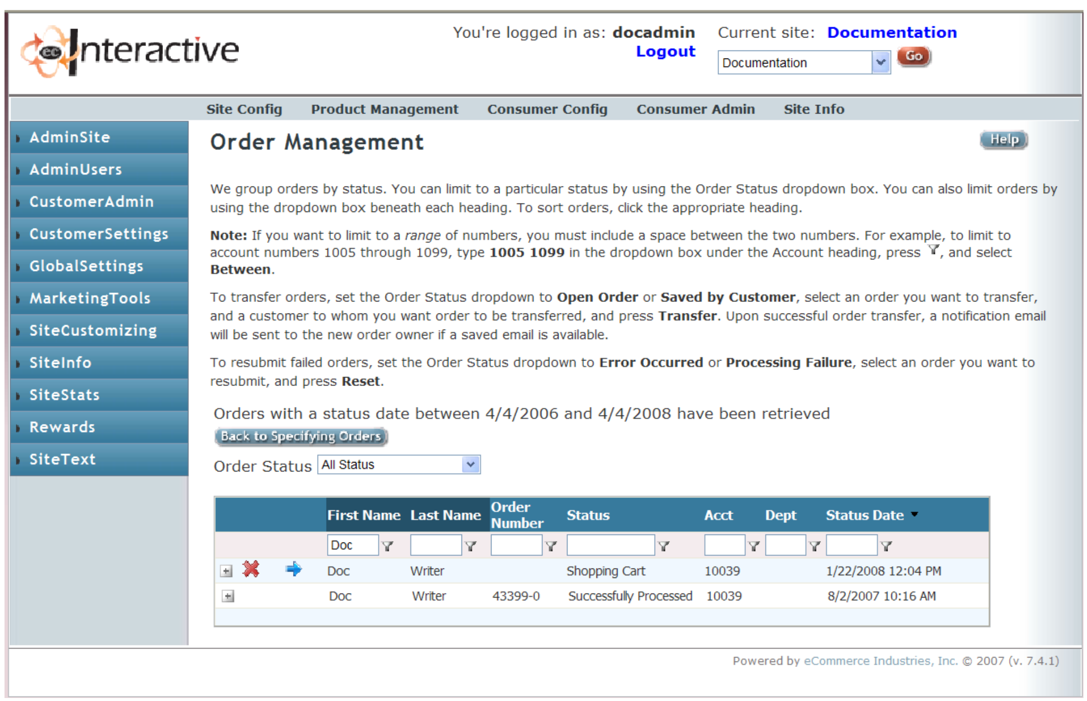
5 To view order detail, click the to the left of the order to view. The system displays the line items on the order along with the statuses the order has been through.

6 This page lets you delete and transfer orders. Only orders displaying a status of Shopping Cart or Saved Orders can be deleted or transferred.

- To delete a displayed order, click . At the Are You Sure prompt, click OK. The order is removed from the list and it no longer appears on the shopper's web page.

Figure 17: Viewing Orders on the Order Management Web Page



- To transfer a displayed order, click . When the shopper list opens, click the check box beside the shopper to select. Click . At the Are You Sure prompt, click OK. The order now appears as a Saved Order and is assigned to the shopper you specified regardless of the order's previous status. An email is sent to the new shopper containing the order's status, previous order user, and link to the order's web site.

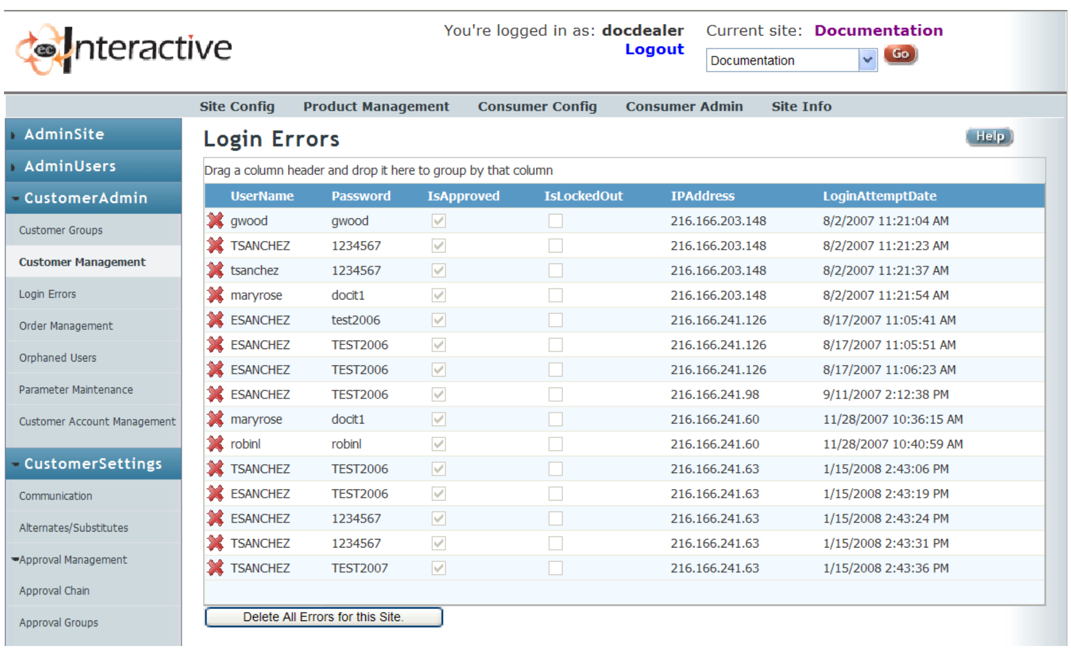
Login Errors

Use the Login Errors page to view a report of login errors. The report is automatically created when you open the page. The Login Errors page displays a list of shopper IDs and passwords that were used when attempting to log into the site. Since ECinteractive does not display passwords, this list displays the combinations that were attempted. Either the username and / or password were incorrect.

You can also use this page to quickly determine the shoppers who may have been locked out due to multiple attempts and failures. If an account is locked, click the Customer Admin training toolbar and click Customer Maintenance. Retrieve the account and click to unlock the shopper. (If a shopper is locked, a check mark (✓) appears in the Locked Out column.)

You can delete a single error or delete all the errors for the site. You can sort the list by any of the categories listed by clicking it. For example, to list the names in alphabetical order, click Username. To list them in reverse alphabetical order, click Username again.

Figure 18: The Login Errors Web Page



1. Click the Site Information training toolbar and select Login Errors. You can also click Customer Admin and select Login Errors.
2. The Login Errors web page opens, as shown in Figure 18. To delete a single error, click .
3. At the Delete This Menu Item prompt, click OK.
4. To delete every error in the report, click Delete All Errors for this Site.

Orphaned Users

The Orphaned Users page displays a list of guest users who began the process of creating an account using the Register Me feature on the Home page but did not complete the process. They are listed along with an email address so you can contact them.

1. Click the Site Information training toolbar and select Orphaned Users. You can also click Customer Admin and select Orphaned Users. The Users Without Customer Associations page opens.
2. To delete an orphaned user, click .
3. At the Delete This Connection prompt, click OK. The orphaned user is removed from the system.

Online Sales Reports

You can use this page to generate a sales report of the users who fit the search criteria you enter. This report provides a list of orders that were placed online. You can download the report as a Microsoft Excel spreadsheet or Adobe PDF document.

1. Click Site Stats and select Online Sales Reports.
2. The information displayed on the Online Sales Reports page is updated from your back end system every 30 minutes with current figures. For accurate reports, generate soon after the sales report information is updated. The time remaining until the next updated appears above the report box. After the data has been updated, refresh the page to see the time until the next update.
3. You can limit the information. Only the information shown in the report box is included in the report. Click the box by which to limit and enter the limiting information. You can use the Dealer Name through Month-to-Date Order Total Amount boxes.
4. Click the down arrow in the PDF Document box to select the report format. You can choose Excel Spreadsheet or PDF Document. Click the appropriate option.
5. Click Generate Report. Make sure your browser is set to allow downloading from this web site. If given the option, save the file to your computer so you can sort and edit the data.