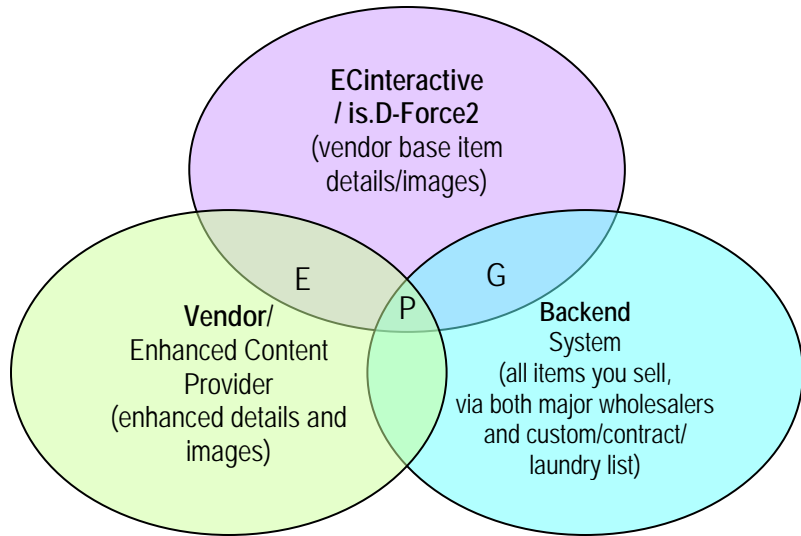


## How It Works

By default, your ECinteractive™ or is.D-Force2® site displays catalog content (product details and images) from your selected vendor. The standard catalog content drives the Browse catalog categories, the search Keyword relevance, item Attribute icons (such as recycled, dated goods, hazardous materials, minority produced), Search results, product long description, and item thumbnail and large image. In the diagram above, this is the top circle.



Your site also displays some item pricing directly from your back-end system via a Gateway interface. In the diagram above, this is the “G” overlap.

You may elect to use your vendor’s Enhanced Content Web services, which usually include enhanced search keywords and category browsing, precise filtering of search results by various product-specific attributes (such as brand, color, or size), side-by-side comparisons, tabbed product detail display, multiple product images, and alternative product suggestions. If that is the case, we refer to the vendor as the Enhanced Content Provider (ECP). In the diagram above, this is the left circle, and the “E” overlap represents the electronic catalogs provided by the vendor for both basic and enhanced content.

However, you may have a number of items in your back-end database that are not carried by these Web content providers. If such a backend-only item exists in a customer’s contract or laundry list, the ECinteractive/is.D-Force2 system pulls the item number, “company” prefix, and short description into an item record that your shopper can retrieve from their Contract, Laundry List, QuickOrder, Search, Favorites, and Order History. These backend-only items will also be placed in Browse Catalog, under a category called “System Items.” Your customers are able order those items as soon as the contract/laundry list is synchronized through the Gateway interface, represented by the “G” overlap.

Other than item number and short description, all backend-only product details will be blank. To provide the kind of detail Web shoppers expect, you can specify item images, long descriptions, manufacturer name, search keywords, pack content, and product attribute icons. You can even copy details from the vendor catalog for your custom items, or override the vendor details. Your custom item data resides on ECinteractive/is.D-Force2 servers.

Once you enter custom items, you can map them not only to one or more custom catalogs that are stored on the ECinteractive/is.D-Force 2 servers, but also authorize a catalog to be synchronized for use with your Enhanced Content features via a special Pipeline. In the diagram above, this is the “P” overlap.

Assigning your custom catalogs to Catalog Groups gives you flexibility in assigning them to specific Customer Groups. You can promote any item under Best Sellers and Web Specials.

## How to Do It

Before you create new ECinteractive user accounts, set up your custom items and catalogs so that you can assign them to user accounts or groups. To help you manage your custom items, catalogs and promotions, the following sequence of steps is recommended (detailed instructions are on the pages that follow):

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## Prepare

### Plan Customer Demos or Web Account Setups A Few Days Ahead

Give yourself a few days to prepare your site in advance of any live prospect or customer demo. This gives you time to get your contracts or laundry lists set up on your backend system, add any outstanding custom item detail to ECinteractive, set up your custom catalogs with categories for assigning to customer groups, and let the system index and synchronize those new items for display, either with Standard or Enhanced Content.

Then, at least a day ahead, we recommend a quick rehearsal test of the items your customer should expect to see. This gives you enough time to make any necessary corrections or adjustments and allow synchronization and indexing to occur after hours before your demo.

### Prioritize Your Site's Catalog Providers

To help eliminate duplicate search results, and speed up retrieval of items, ECinteractive *standard search* utilizes a ranking index. All the Web catalog content providers are assigned a default rank, with your dealer-customized site-specific catalog at the top.

- The default rankings for ECinteractive sites are shown at left: first your site-specific custom catalog items, then the catalogs shown in Global Catalog Group Management, then the remaining content providers in the order shown.
- For is.D-Force 2, the default ranks are your site-specific custom catalog items first, then is.group.

Rank	Wholesaler
1	Your Site Name
2	SPR
3	United
4	FSI
5	AMW
6	Lagasse
7	Horizon
8	Supplies Network (DMI)
9	SPR Canada
10	ECI2

In the **Site Customization** menu, click **Wholesaler Priority Management**. Review the rankings to be sure they match your preferences. To re-rank, simply enter a new sequence of numbers in the Rank column.

This ranking determines which unique item SKU is used by ECinteractive *standard search* when global and custom catalogs have the same SKUs in common. For example, if ABC1234 is in both United Stationers and S.P. Richards catalogs, and United is ranked higher than SPR, your site will display the United categories, product details, and image(s) for that common item. If your custom catalog has ABC1234, and your site name is ranked highest, the site will display the content you entered for that item. Adding new custom catalog items will trigger an update to your catalog combination index (CCI).

Exception. If your site uses the Enhanced Search feature, this ranking will not affect Browse categories, Search results, or product detail, since a third-party content repository provides that information. However, the wholesaler priority ranking still drives which content is displayed in MyFavorites, Contracts, Laundry Lists, Web Specials, Preferred Items, and Product Showcases.

To rank specific items in either standard or enhanced content, see Manage ECP Ranking on page 31.

### Allow Contracts and Laundry Lists to Sync

During the sync process that is scheduled nightly, the ECinteractive system determines what backend contract and laundry list items are missing from your online catalog. For specific customer contracts, you can initiate this process manually in the **Site Info >**

**Contract/Laundry List Management** page by clicking **Sync Now**. After hours, the system automatically adds backend-only items to a Custom Item table in the Web content database.

It also assigns them to a default site-specific custom catalog called “System Items” that displays in product search results and category browsing.

At quarter-end, a dealer usually loads the back-end item database update from wholesalers. This may change items in backend contracts and laundry lists. That night, the ECinteractive system will automatically adjust the list of backend-only items that are stored in the Custom Item table. Meanwhile, there may be a time difference of a few days until ECi loads wholesaler and trading group images and product detail into your ECinteractive Web content. A backend-only item (which was added to the Custom Item table during a contract/laundry list sync) may suddenly have e-content available. When the e-content is available, the system automatically deletes the item from the Custom Item table and the site-specific System Items category, so that the site can begin using the newly available product details and images.

#### (Optional) Set Up Your Site to Use Enhanced Content From Your Selected Vendor

See *Setting Up SPR Enhanced Content in ECinteractive* and *Setting Up United Enhanced Content in ECinteractive* on the ECinteractive support site.

#### Pick Items to Copy from Existing Web Content to Repurpose for Custom Items

To find items that do not have Web catalog images and details, log into your Admin Control Panel, click **SiteCustomizing** and then click **Custom Product Management**. Under **Custom Catalogs**, click **System Items** and click **Manage Catalog Products** to view the Catalog List. You can search your own shopping site to determine what existing item details from your wholesaler are similar to your System Items. You can copy details from the vendor catalog and edit their details for your custom items; *however, doing so will override information used in Comparisons and Product Detail pages.*

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**Note:** Due to copyright infringement concerns, your system will not copy item images from your wholesaler content to your custom catalog. It is the dealer’s responsibility to collect images for custom items.

---

#### Collect Additional Product Details for Your Custom Items

To provide the kind of detail Web shoppers expect on remaining custom items, you can specify long descriptions, manufacturer name, search keywords, pack content, product attribute icons, and images. Your manufacturer or supplier may provide relevant information. It will be helpful to have one list of the manufacturers for all your custom items.

#### Prepare Product Images for Your Custom Items

When preparing your custom product image files to upload, please keep these rules in mind:

- Image file types are limited to those with extensions ".gif", ".jpg", ".jpeg", or ".png".
- Image filesize is limited to 40 KB. However, we recommend that you use images no larger than 12 KB. Large image files will make your Web pages slow to load.
- Image dimension is limited to 300 pixels wide by 300 pixels high. However, we recommend limiting thumbnail images to 75x75, and standard images to 240 x 240. If your image is larger than this, the web page must shrink it to fit, resulting in distortion or loss of image quality.

## Customize Your Catalog(s)

### Tip: Using Hotkeys

Throughout Custom Product Management (CPM), press the “H” key to display a list of hotkeys, or keyboard shortcuts to common actions. Hotkey lists are illustrated here for each page.

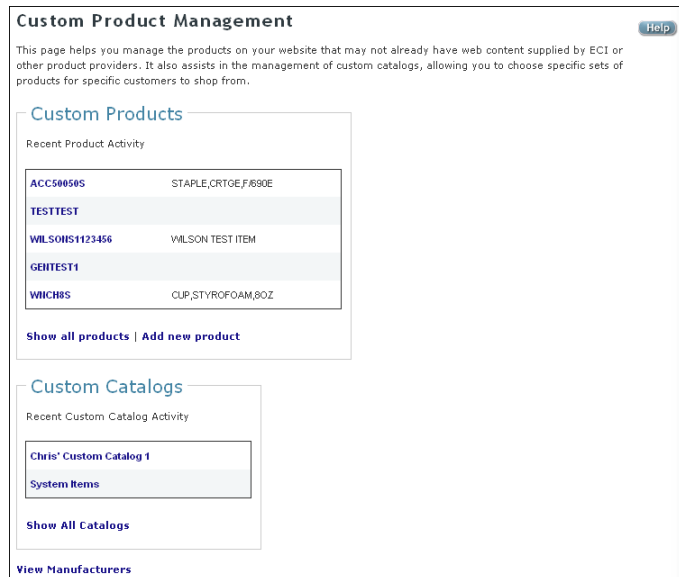
### Go to the Custom Product Management Dashboard

1. To navigate to Custom Product Management, you have two menu options:

- From the left navigation menu, find it on the **Site Customizing** menu.
- From the top navigation menu, find it on the **Product Management** menu.



The dashboard provides a bird’s eye view of your recent activity, and links to perform various tasks, as shown above.

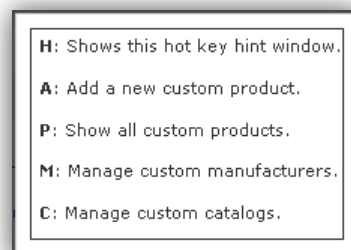
- Under **Custom Products**, you may see **Recent Custom Catalog Activity**. This shows a list of links to the last five products the current user viewed and/or edited.
- Under **Custom Catalogs**, you may see **Recent Product Activity**. This shows a list of links to the last five custom catalogs the current user viewed and/or edited.



- If you authorized a custom catalog your supplier’s system to use in Search results, comparisons, and item detail, you may see **Enhanced Content Provider (ECP)**.
- You will see a link to **View Manufacturers**, which takes you to a list of manufacturers that can be selected when creating or editing custom product records.

2. To view a list of **hotkeys** available for this page, press H:

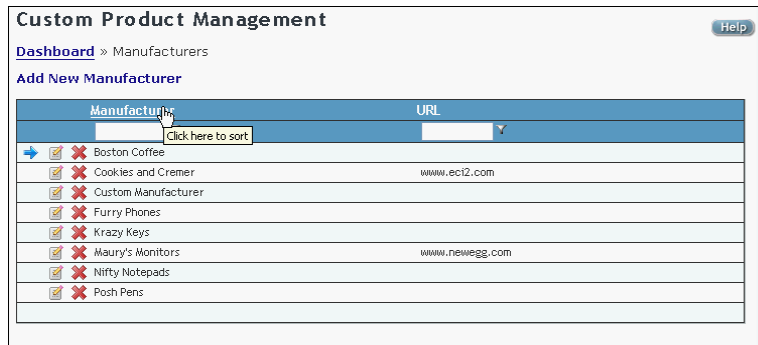
- To add a new custom product, press A.
- To show all custom products, pres P.
- To manage custom manufacturers, press M.
- To manage custom catalogs, press C.
- To close the hotkey display, click  or .



## Add Manufacturers

To add manufacturer names required when you enter custom products, follow these steps:

1. In the Custom Product Management dashboard, click **View Manufacturers**.



The grid allows various ways to navigate:

- This list drives the options available in the Manufacturer field when creating or editing a custom product detail record.
- To **sort** the grid alphanumerically by a column, click its column header link.
- To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter button to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.
- The grid row arrow shows you the selected row where you can take action using hotkeys: J to move the arrow to the next row or K to move it to the previous row.
- For each row, you can select **Edit** or **Delete**, either by clicking the icons or using the E or Delete hotkeys.
- The footer lets you navigate between multiple pages within the list, by specifying a page number or clicking **Next** and **Previous**.

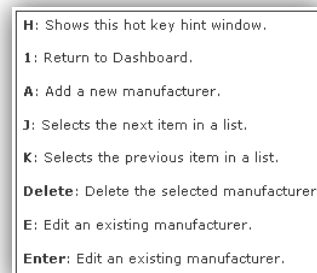
2. To view a list of **hotkeys** available for this page, press H.

To close the hotkey display, click  or .

3. To add a new manufacturer, press A or click the **Add New Manufacturer** link.

4. Enter the **Manufacturer Name** to be displayed among custom product details.

5. Enter the **Manufacturer URL**, or the Web address you want your customers to be able to visit if they want more information about the product's manufacturer.



6. Click **Add/Update Manufacturer**. The screen returns to the Manufacturer grid.

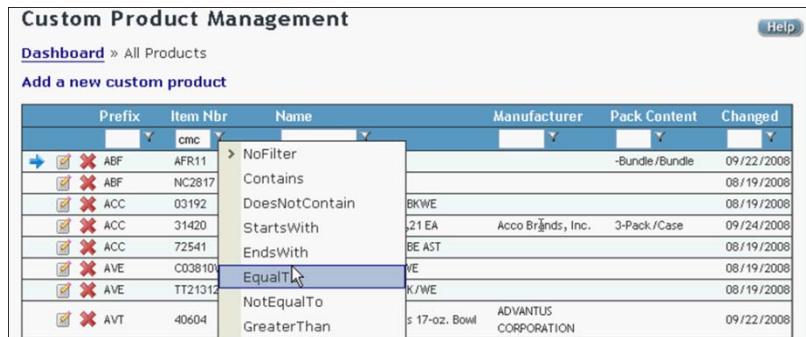
### Add Custom Products

- Return to the Custom Product Management dashboard, by clicking the **Dashboard »** breadcrumb link.

In the Custom Products fieldset, you have several options.

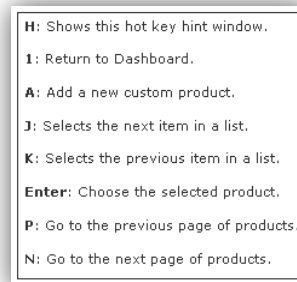
- **Show All Products** takes you to the Item Management grid.
- **Recent Custom Catalog Activity** may show a list of links for the last five products you viewed and/or edited. Each link takes you to the item's Product Detail page.
- **Add New Product** opens a query form where you can enter full or partial item number or SKU. The system looks for matching records in the database. If matches exist, you can click a link to the existing product record for editing, or enter a different item number. If it is a unique item, the system takes you to a form where you may enter details for a new product.

- Click **Show All Products** to view the Custom Products grid. The grid allows various ways to navigate:
  - To **sort** the grid alphanumerically by a column, click its column header link.
  - To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter button to choose an operator, such as



EqualTo, Contains, IsEmpty, and so on.

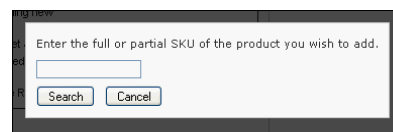
- The grid row arrow shows you the selected row where you can take action using **hotkeys**: J to move the arrow to the next row or K to move it to the previous row.
- For each row, you can select **Edit** or **Delete**, either by clicking the icons or using the E or Delete hotkeys. You can also (A) **Add** a new custom catalog.
- The footer lets you navigate between multiple pages within the list, by specifying a page number or clicking Next and Previous.



- To view a list of **hotkeys** available for this page, press H. To close the hotkey display, click or .

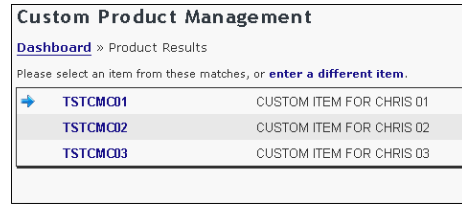
- To add a new custom product, press A or click the **Add a new custom product** link.

- In the dialog box that appears, enter the part or all of the item number (**SKU**) of the product you wish to add.



- Click **Search**. The system looks for matching records in the backend database.

- If the item cannot be found in your backend system, you are prompted to try again.
- If matches exist, the results grid row arrow shows you the selected row where you can take action using hotkeys: J to move the arrow to the next row or K to move it to the previous row. You can click a link to an existing product record for editing, or you may click a link to enter a different item number, as shown at right.

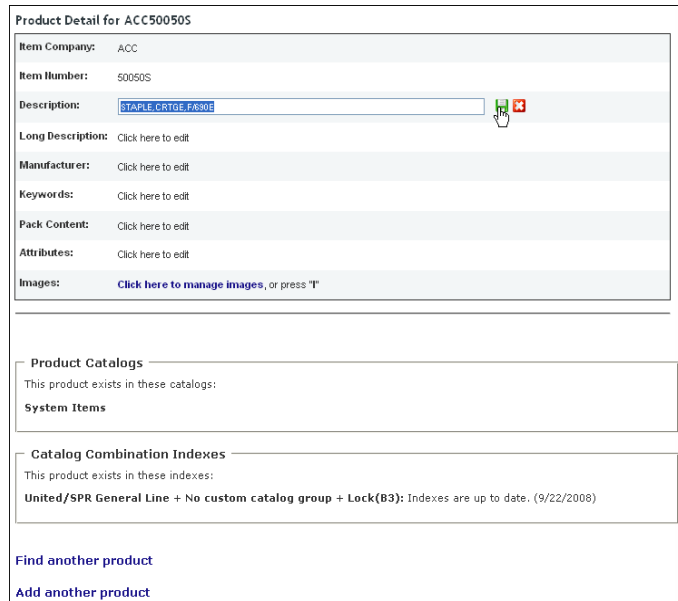


13. Click the link for the desired item where you wish to view or add product detail. The Product Detail page shows several options:

- **Item company, item number, and short description** are automatically populated from your backend item database.

Note: Item Company and Item Number are not editable.

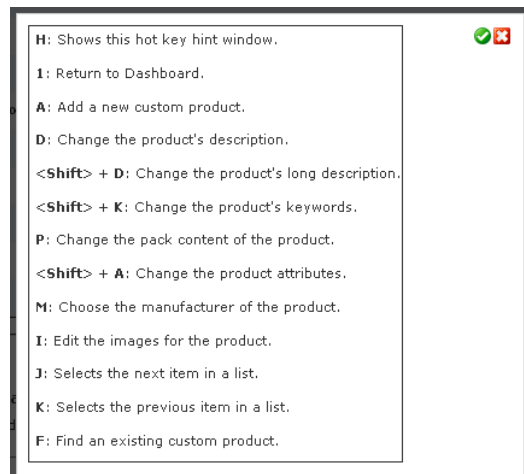
- You can click various fields or use the hotkeys to add or edit product detail records, or upload **images**.
- The Product Detail page lists the **Catalogs and Catalog Combination Index (CCI)** that include this product, if applicable.



14. You have several options, each with their own hotkeys. To view this page's **Hotkey** hints, press H. To close the hotkey display, click or .

15. To change the product's **Description**, press D or click the existing description text. This changes the text to a text field, and gives you icons to Save or Cancel.

16. To change the product's **Long Description**, hold down the Shift key and press D or click the existing long description text.





17. In the HTML-capable text window that appears, you can type, cut and paste, Add bullets, and format as you see fit.

18. When you click **Save**, the Product Detail page shows a preview of what you entered.

19. To select the **Manufacturer**, click the “**Click here to edit**” text, or press M, or click the existing Manufacturer name.

Click the drop-down arrow to select the desired manufacturer. As you type, the list skips to the matching manufacturer name(s).

- When you have selected the desired manufacturer, click **Save**.
- If the desired manufacturer is not in this list, go back to the Dashboard, and click **View Manufacturers** and then press A or click Add New Manufacturer.

20. To select the **Keywords**, click the “**Click here to edit**” text, or hold down the Shift key and press K, or click the existing Keyword text. This changes the text to a text field, and gives you icons to  Save or  Cancel.

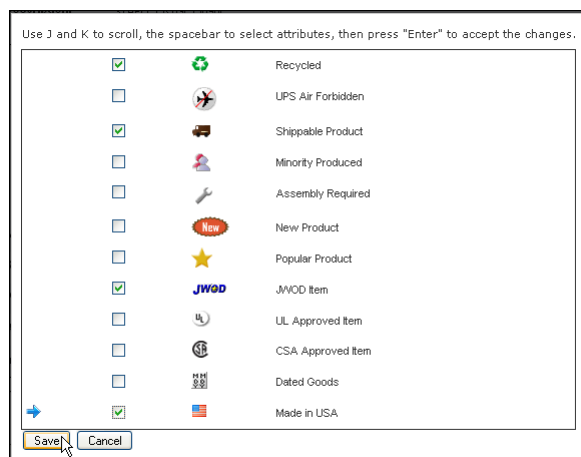
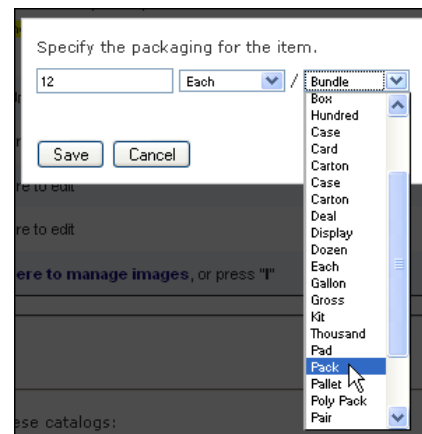
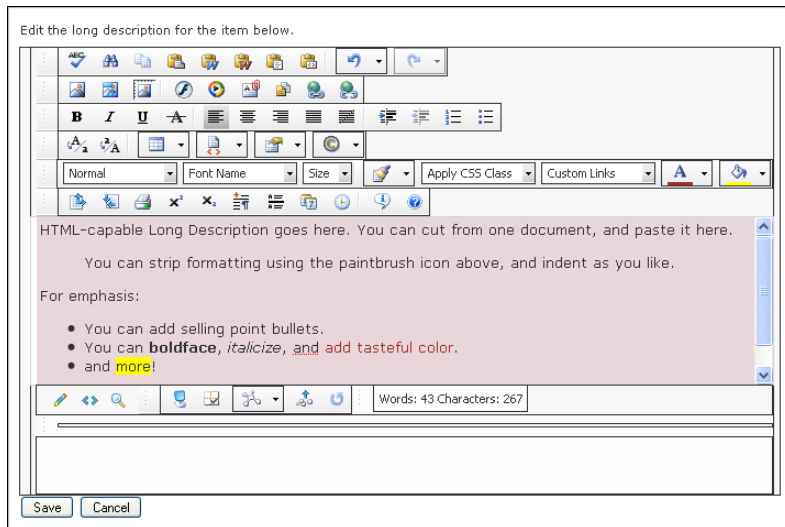
21. To specify the pack content, click the “**Click here to edit**” text, or press P, or click the existing Pack Content text. Enter a quantity, and click the down arrows to select a unit size per package size. Then click Save or Cancel.

22. To specify **Product Attributes**, hold down the Shift key and press A or click the existing list of attributes.




In the Attributes window that appears, the row arrow shows you the selected row where you can take action using hotkeys: J to move the arrow to the next row or K to move it to the previous row.

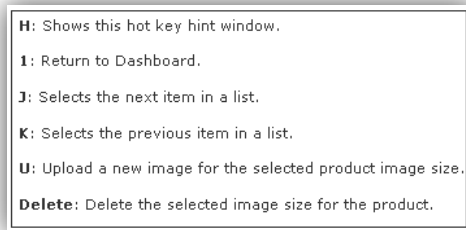
For each row, you can click the space bar or click the checkbox to place a checkmark. To accept your changes, you can press Enter or click Save.


Attributes are used in ECinteractive’s standard Advanced Search filtering.



23. To specify the product images, click the **“Click here to manage images”** text, or press I, or click the existing images.

- In the Product Images page that appears, you can upload or delete image or thumbnail image for the selected item.
- Image file types are limited to those with extensions ".gif", ".jpg", ".jpeg", or ".png".
- Image filesize is limited to 40 KB. However, we recommend that you use images no larger than 12 KB. Large image files will make your Web pages slow to load.
- Image dimension is limited to 300 pixels wide by 300 pixels high. However, we recommend limiting thumbnail images to 75x75, and standard images to 240 x 240. If your image is larger than this, the web page must shrink it to fit, resulting in distortion or loss of image quality.
- To view a list of **hotkeys** available for this page, press H. To close the hotkey display, click  or .
- The row arrow shows you the selected row where you can take action using hotkeys: J to move the arrow to the next row or K to move it to the previous row.
- For each row (thumbnail or standard), you can press U or click the  Upload button, or press the Delete key to remove the selected image.



24. Press U or click the  **Upload** button for either standard size image (up to 300x300 pixels) or thumbnail image (about 75x75 pixels).

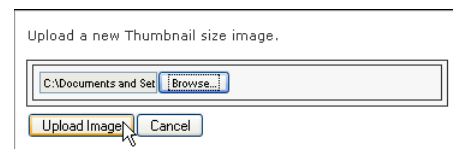
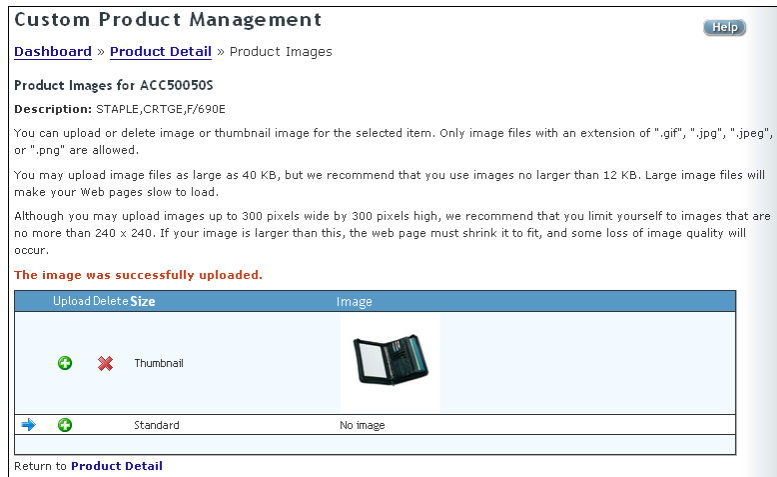
25. Click the **Browse** button.

26. Navigate to the location on your computer or network where the image resides.

27. Select the file to upload, and click **Open**.

28. Click **Upload Image**.

29. Repeat steps 23-28 for the other image size.



**Note:** If the image you select to upload exceeds the 300x300 resolution limit, the following message appears directly above the grid: “[filename.ext] exceeds maximum allowed dimension of 300 x 300”

### Copy/Override Wholesaler Detail for Custom Catalog

What if you have identified some custom items where you would like to use existing wholesaler catalog details?

To copy existing wholesaler details for your Custom Catalog, you have the ability to copy any details from any original document or Web page and paste it into the Product Detail page for your custom product.

However, to override wholesaler data for your Custom Catalog, just enter the wholesaler's **SKU** and edit the **Product Detail**.

From the **Custom Product Management Dashboard**, click **Add New Product**. Similarly, from the **All Products** list, click **Add a New Custom Product**. You will be prompted to enter a SKU.

- If you enter a SKU that doesn't exist in your backend Item database, you are prompted to specify another item.
- If you enter a SKU that already exists in one online catalog, it will take you to that item's Product Detail.
- If you enter a SKU that already exists in multiple online catalogs, it may give you the opportunity to pick which catalog you want to use for the content for your custom item, as shown below.



Then, on the Product Detail page, you can customize the existing details as you see fit, by clicking the existing data or using the hotkeys as discussed previously under Add Custom Products.

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**Note:** Due to copyright infringement concerns, your system will not copy item images from your wholesaler content to your custom catalog. It is the dealer's responsibility to collect images for custom items.

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### Create One Base Custom Catalog

We recommend creating one base custom catalog with all your custom items. If you are using the Enhanced Content Provider (ECP) services provided by one of your wholesalers, you should select this base Custom Catalog to be authorized for your ECP to include your custom items in their Enhanced Search Results, Comparisons, Product Details, and Browse Catalog categories.

**Note:** You cannot ECP-authorize or delete the default backend-only System Items catalog. This System Items catalog is automatically populated by synchronization processes. It is meant to include just the backend only items that are missing Web content details or images. Instead, create a new catalog with a unique name of your choice, and assign custom products to that new catalog.

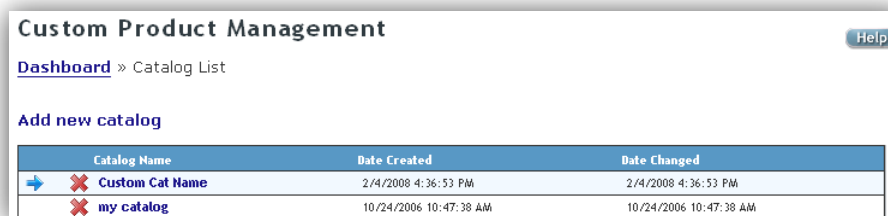
If necessary, you can easily make a copy of your authorized base catalog, and make changes to suit a new customer group.

1. Return to the Custom Product Management dashboard, by clicking the **Dashboard »** breadcrumb link.

In the Custom Catalogs fieldset, you have several options.

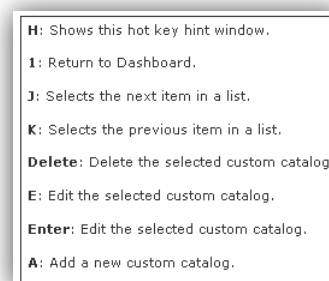
- **Show All Catalogs** takes you to the Item Management grid.
- **Recent Custom Catalog Activity** may show a list of links for the last five custom catalogs you viewed and/or edited. Each link takes you to the item’s Catalog Detail page.

2. Click **Show All Catalogs** to view the Catalog List.

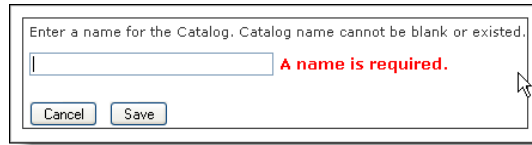


The grid allows various ways to navigate:

- To **sort** the grid alphanumerically by a column, click its column header link.
- To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter button to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.
- To view this page’s **Hotkey** hints, press H. To close the hotkey display, click or .
- The grid row arrow shows you the selected row where you can take action using hotkeys: J to move the arrow to the next row or K to move it to the previous row.
- The footer lets you navigate between multiple pages within the list, by specifying a page number or clicking Next and Previous.



- To add a new custom catalog, press A or click the **Add New Catalog** link. Then enter a **name** for the Catalog and click **Save**.



- If you leave the name blank, you will be prompted, “A name is required.”
  - If you enter a catalog name that already exists, you will be prompted, “This catalog name exists.”
- To delete the selected row’s catalog, press the Delete key or click the **Delete** button. When prompted “Are you sure?” click Yes.

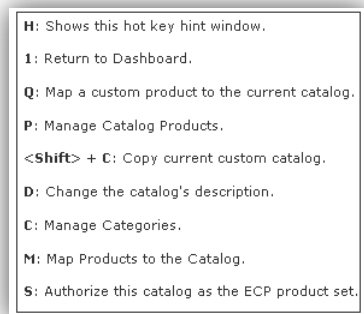
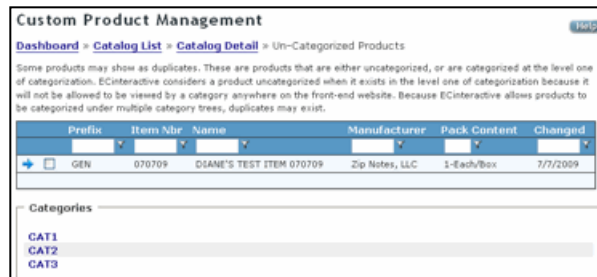
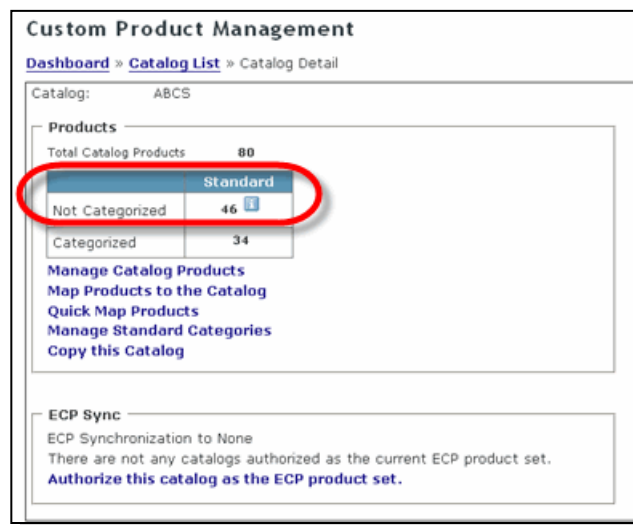
### View and Edit Catalog Detail



- To view and **Edit** the selected row’s catalog in the Catalog List, press the E key or click the catalog name link.


If you are in the Dashboard page, you can click the **System Items** catalog link, or other recently edited catalog names. However, the System Items catalog will not have ECP authorization options.

The Catalog Detail page displays:

- The currently selected **Catalog** name.
- The number of **Products** currently mapped to this catalog.
- The total number of products in this catalog that have no Category assigned. (You can click the "i" button to go to the **Uncategorized Products** page. There, you can filter to a set of items, select individual items using the checkboxes, drill down to a subcategory, and click the link that appears, **Map Selected Products to the Category**.)
- The total number of products in this catalog with a Category assigned. Categories for some items may come from the backend system’s contracts and laundry lists.
- Your **Enhanced Content Provider (ECP)**, according to your global Site Preferences.
- Whether this catalog is **authorized** as the current ECP product set.



2. To view this page's **Hotkey** hints, press H. To close the hotkey display, click  or .
3. To make a copy of the selected catalog, press SHIFT + C or click **Copy this Catalog**. The name will default to "Copy of" appended to the beginning of the original catalog name, as shown below.



Enter a name for the Catalog to which the selected catalog will be copied. This new Catalog name cannot be blank or existed.

Copy of Chris' Custom Catalog 1

Cancel Save

- If you leave the name blank, you will be prompted, "A name is required."
- If you enter a catalog name that already exists, you will be prompted, "This catalog name exists."

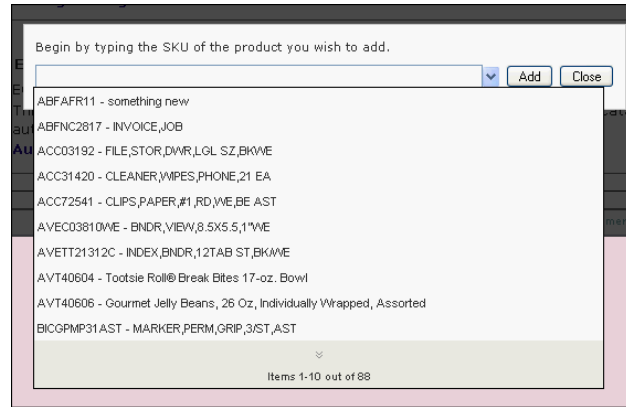
---

\*Note: To assign custom items to categories, see [Customize Your Category Trees](#) on page 17.

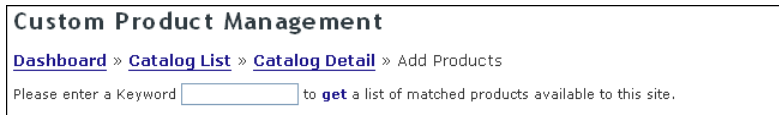
---

### Map All Products You Want to Use to This Base Catalog

4. To map products to this catalog by SKU, press Q or click **Quick Map Products**.
5. Begin entering the **SKU** (item company abbreviation and number). As you type, the drop-down list skips to the manufacturer name(s) that match.
6. Select the desired item, and press Enter or click **Add**. The item is added to the Catalog Products grid.
7. To map products to this catalog by keyword, press M or click **Map Products to the Catalog**.



8. In the Add Products page, you can enter a **Keyword** and click the get link to show a list of matched products available to this site.



9. The grid allows various ways to navigate:

- The **grid row arrow** shows you the selected row where you can take action using hotkeys: J to move the arrow to the next row or K to move it to the previous row.
- The **footer** lets you navigate between multiple pages within the list, by specifying a page number or clicking Next and Previous.
- To **sort** the grid alphanumerically by a column, click its column header link.
- To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter button to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.

**Custom Product Management** Help

[Dashboard](#) » [Catalog List](#) » [Catalog Detail](#) » Add Products

Please enter a Keyword  to get a product list available to the site.

**Add Selected Products to the Catalog**

	Prefix	Item Nbr	Name	Manufacturer	Pack Content	Changed
<input checked="" type="checkbox"/>	AVE	H99202	Labeler And White Permanent Labels And Red Removable Labels	AVERY DENNISON CANADA INC.	1 Each/Pack	08/15/2007
<input checked="" type="checkbox"/>	BRT	TZB41	P-Touch® Tape Cartridge, TZ Stand Laminated Tape, Black/Fluorescent Orange, 3/4"W	BROTHER INTERNATIONAL CORP.	1 Each/Box	08/27/2007
<input checked="" type="checkbox"/>	CSO	TR18BU	Tape, Ink Ribbon, F/CW50, CW75, CW1300, 18mm, Blue	Casio, Inc.	1 Each/Pack	03/28/2007
<input checked="" type="checkbox"/>	DYW	12967	Xpress Pro Labelmaker, Uses 3/8" Wide Tape, Soft Grip Handle	DYMO c/o SANFORD	1 Each/Box	08/15/2007
<input checked="" type="checkbox"/>	DYW	30255	Address Labels, 1-1/8"x3-1/2", 130 Labels/Roll, Yellow	Dymo Corporation	130 Each/Box	03/28/2007
<input type="checkbox"/>	DYW	45017	D1 Tape Cartridge for Electronic Label Makers, Black on Red, 1/2" w x 23 ft.	SANFORD INK COMPANY	5 Each/Box	08/27/2007
<input type="checkbox"/>	DYW	45806	D1 Tape Cartridge for Electronic Label Makers, Black on Blue, 3/4" w x 23 ft.	SANFORD INK COMPANY	5 Each/Box	08/27/2007
<input type="checkbox"/>	DYW	45807	D1 Tape Cartridge for Electronic Label Makers, Black on Red, 3/4" w x 23 ft.	SANFORD INK COMPANY	5 Each/Box	08/27/2007
<input type="checkbox"/>	DYW	60611	D2 Tape Cassette for Dymo Labelmakers 9000, 6000, PC-300, PC-10, White, 1/4" W	SANFORD INK COMPANY	5 Each/Box	08/27/2007
<input type="checkbox"/>	DYW	69100	Electric Labelmaker,USB Connection,Prints 40 Labels Per Min.	Dymo Corporation	1 Each/Box	03/28/2007
<input type="checkbox"/>	DYW	69270	Desktop Mailing Solution PC Connected Label Printer	SANFORD INK COMPANY		08/27/2007
<input type="checkbox"/>	NJK	B162	Correctable Film, Advantage D36/D50, 610, 620, 635, Black	Nukote International	1 Each/Box	03/28/2007
<input type="checkbox"/>	SOU	RF4	Connoisseur Collection® Mailing Envelopes with Labels, 9x12, 10x12, 11x14	SOUTHWORTH COMPANY		08/27/2007

10. Click the checkbox or press the **Space** bar to place a checkmark in the desired rows.
11. When you have selected all the products you wish to map to this catalog, click the link, **Add Selected Products to the Catalog**.

### Authorize Your Base Custom Catalog As Your ECP Product Set

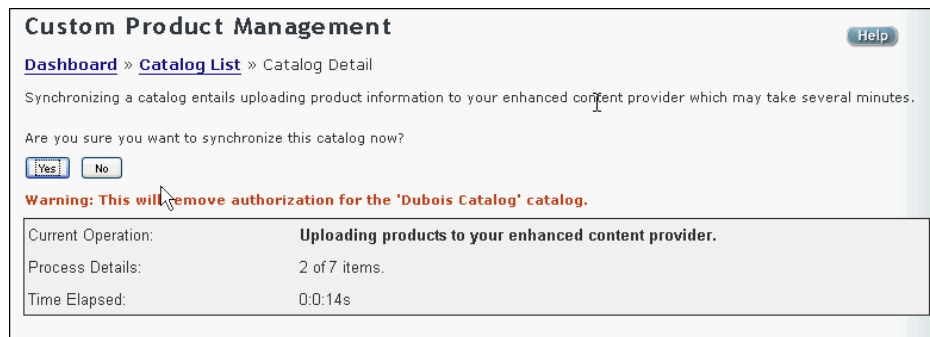
When you have completed an initial base custom catalog with all the items you wish to promote through your Enhanced Content Provider's (ECP's) system, you can authorize it as your current ECP custom product set. On a periodic basis — after ECi's nightly indexing of Catalog Combination Indexes and Contracts/Laundry List synchronization — your ECP will run a process to add your authorized ECP custom catalog through its pipeline.

In turn, your custom content will be available to Enhanced Search results, comparisons, Browse Catalog, Item Detail, and alternative product features such as Similar Products that match the product category. (To assign custom items to categories, see Customize Your Category Trees on page 17.)

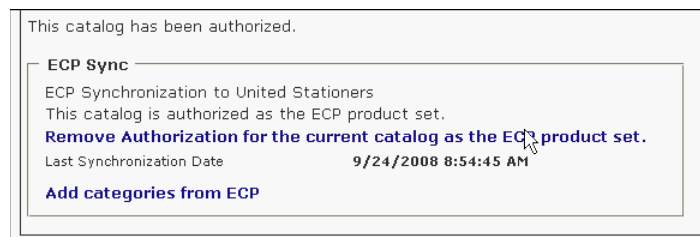
12. Return to the Catalog Detail page, by clicking the **Catalog Detail** » breadcrumb link.
13. In the ECP Sync fieldset, click the link, **Authorize this catalog as the ECP product set**.
14. At the prompt, "Synchronizing a catalog entails uploading product information to your enhanced content provider which may take several minutes. Are you sure you want to synchronize this catalog now?" click **Yes**.

A box will show number of items being processed, and the time elapsed, as shown below

**Note:** If you already have a catalog authorized as your ECP product set, you will be prompted as follows: "Warning: This will remove authorization for the Catalog Name catalog" as shown below in red. *There can be only one ECP-authorized catalog on your site at a time.*



15. When you see "Your synchronization is complete," click **Continue** to return to Catalog Detail, where you will see "This catalog has been authorized," along with which wholesaler provides ECP Synchronization and last synchronization date, as shown below.



16. If you change your mind, you can press R or click the link, "**Remove Authorization for the current catalog as the ECP product set**."

## Customize Your Category Trees

Category trees help shoppers browse collections of items with similar materials or features. The Standard Category tree is used in the Browse Catalog feature of the shopping site's home page, as well as in user Favorites and other item lists.

While some of your custom items fall under the same categories as your wholesaler catalog, others may be exclusive to your site, and you may wish to highlight them under a special category. If your site is set up to use standard content, your shopping site will display links for the subcategories you set up for your Custom Catalog Items.

### Understanding Custom Item Category Rules

The system follows certain rules for displaying your custom items and categories.

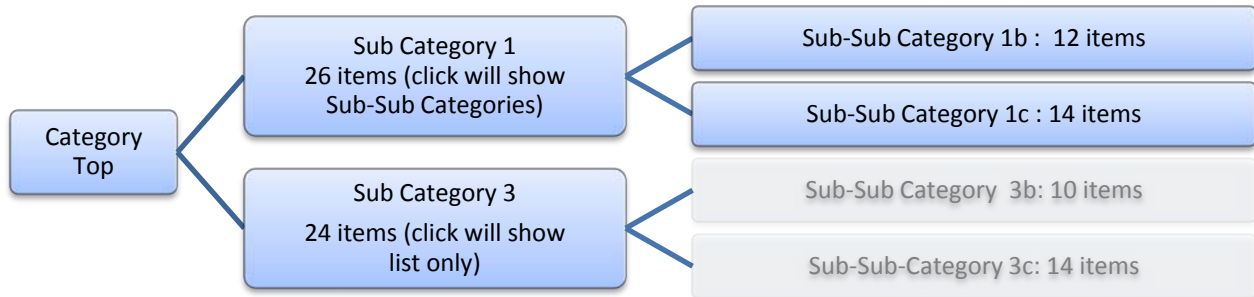
- **A 25-item Threshold Minimizes Clicks.** If a category contains 25 or more items, your site shows the subcategory links you have defined. If it's less than 25 items, it shows the item list. This threshold minimizes the number of clicks required to get to desired items. It also minimizes the amount of granularity required for you to map your category tree
- **Cross-Pollenization is Easy.** If a custom item logically belongs to two or more categories within the same catalog, no problem. Any item can be mapped to multiple categories or subcategories.
- **Standard Categorization is Worth It.** If you don't categorize your custom items in the standard catalog, your customers will not be able to find those items through the Standard Browse Catalog categories, Favorites categories, or related pages. Instead, they will be displayed in the Miscellaneous category.
- **ECP Category Mapping is Worth It.** If you use United Smart Search or S.P. Richard's Enhanced Content Provider (ECP) catalog, items that you have not mapped to ECP categories will be displayed according to your Standard category tree, if you have mapped them there. Any remaining uncategorized items fall into Miscellaneous. Uncategorized items in your custom ECP catalog will not display among Similar Products in Product Detail or Cart pages, because those lists are generated in part by category name.
- **Plan Your Categories and Check your Spelling.** If your custom category trees differ from the standard or ECP tree or contain spelling mistakes, it will result in duplicate categories. Browse your own site for ideas before you set up your category trees.
- **Browse For Your Custom Items Periodically.** Wholesalers are subject to update their category trees at quarter-end or with the release of a new general line catalog. If you previously created an ECP category structure, it's a good idea to Browse your site periodically, make sure all your custom categories still exist, and re-map as needed.

### Planning Your Custom Categories: Example

The number of items in a category tree determines whether the system displays the item list, or the next set of subcategories you've defined. For instance, let's say the customer clicks the top tier category "Paper." The system counts how many items are in the category "Paper".

- If there are less than 25 items, then we show the list of products.
- If there are 25 items or more, and subcategories have been defined, the subcategories are displayed. Let's say the customer clicks on "Copy Paper." Again, the system counts how many products are in that category.
  - If less than 25, the system shows the product list.
  - If 25 items or more, the system shows any subcategories that have been defined.
    - And so on, until the catalog runs out of categories and items.

In the following diagram, Sub Category 1 has been properly set up so that the system will display three tiers of categories.



- Under Sub Category 1, the bottom-most tier has 26 items divided into two Sub-Sub-Categories. Since it is 25 items or more, clicking the 26-item Sub Category 1 will display its sub-sub-categories.
- Under Sub Category 3, the bottom-most tier has only 24 items. Even though those are currently divided into sub-sub-categories, only the list of 24 items will be displayed if you click Sub Category 3, since it contains less than 25.

**Note:** As you can see, for custom subcategories with *less than 25* items, there is no need to map the items to sub-sub categories, unless you plan to add more items to those smaller subcategories later.

*Again, this is meant to minimize the number of clicks required to get to desired items, and to minimize the amount of granularity required for you to map in your category tree.*

The results in the shopping site are shown below. Clicking Category1 (26 items) displays the subcategories you have built. Clicking Category3 (24 items) will display an item list.







**Category 1 > 25 items:** will show subcategories if defined, as shown at left inset.

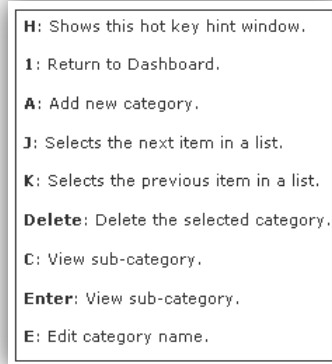
**Category 3 < 25 items:** will show item list only, as shown at right inset.



### Building Standard Category Trees

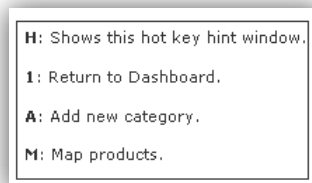
The following steps apply only to categories used in Standard Catalog Browse, Favorites, and related pages. (For Enhanced Search and Product Detail, your wholesaler/Enhanced Content Provider has separate Category Trees; see Mapping Custom Items to ECP Categories on page 21.)

**Note:** You must first have mapped custom items to the current catalog before you may map items to categories.

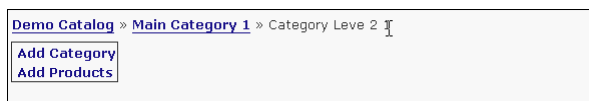
1. To build a category tree, press C or click **Manage Categories**.
2. To view the **Hotkey** hints, press H. To close the hotkey display, click  or .
  - Once you have a list of multiple subcategories, the grid row arrow shows you the selected row, and you can press J to move the arrow to the next row or K to move it to the previous row.
3. In the Category Management page, press A or click **Add New Category**.
4. Enter a **category name** and press Enter or click **Save**. If you leave the name blank, you will be prompted, “A name is required.”
5. To rename the current subcategory, press E or click the  **Edit** button. Enter a category name and press Enter or click  to **Save**. To cancel without saving, click  **Exit**.
6. To add a subcategory to an existing category, click the **Add Category** link.
7. Enter a **category name** for the subcategory and press Enter or click **Save**. If you leave the name blank, you will be prompted, “A name is required.”
8. To delete the selected row’s category, press the Delete key or click the  **Delete** button. When prompted “Are you sure?” click **Yes**.



9. To view any sub-categories you have already assigned, press C or click the subcategory name link.
10. To view this page’s **Hotkey** hints, press H. To close the hotkey display, click  or .



11. To add a subcategory to an existing category, press A or click the **Add Category** link.
12. To add products to the current category, press M or click the **Map Products** link.



13. The products grid allows you to select products to map to this category.



**Custom Product Management** Help

[Dashboard](#) » [Catalog List](#) » [Catalog Detail](#) » Category Management

Return to [Category](#)

Map selected products to this category

<input type="checkbox"/>	Prefix	Item Nbr	Name	Manufacturer	Pack Content	Changed
<input type="checkbox"/>	ABC	PAPER				04/22/2009
<input type="checkbox"/>	CCC	DRPEPPER	24 8OZ CANS OF DR PEPPER	CCC	24-Each/Case	04/06/2009
<input type="checkbox"/>	CCC	TESTASSEMBLY	ASSEMBLY TEST	CCC	1-Each/Each	04/01/2009
<input type="checkbox"/>	ECI	JOHN	ave11446	avery		03/24/2008
<input type="checkbox"/>	FEL	0001102	FILE,STOR,12X10.25X24L			11/05/2008
<input type="checkbox"/>	JDM	PAPER	JDM PAPER 8X11	Acco Brands, Inc.		10/21/2008
<input type="checkbox"/>	JDM	PEN	PEN -BLUE	Johnson & Johnson		10/21/2008
<input type="checkbox"/>	JDM	PRINTER	JDM PRINTER	Acme United Corporation		10/21/2008
<input type="checkbox"/>	JDM	TONER	TONER -BLACK	Accentra, Inc.		10/21/2008

- To **sort** the grid alphanumerically by a column, click its column header link.
- To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter button to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.
- To view this page's hotkey hints, press H. To close the hotkey display, click  or .
- The **grid row arrow** shows you the selected row where you can take action using hotkeys: J to move the arrow to the **next** row or K to move it to the **previous** row.
- The footer lets you navigate between multiple pages within the list, by specifying a page number or clicking **Next** and **Previous**.
- To return to the Category, click the **Category Name** link or press C.

H: Shows this hot key hint window.  
 I: Return to Dashboard.  
 C: Back to the category.  
 M: Map selected products to the category.  
 J: Selects the next item in a list.  
 K: Selects the previous item in a list.  
 Enter: Select the product.

14. Click the checkbox to place a checkmark in the desired rows or press Enter when the blue arrow is pointing to the desired item.
15. When you have selected all the products you wish to map to this catalog, click the link, **Map Selected Products to the Category**, or press M.

**Note:** You can map the same products to multiple categories and subcategories. For example, if you map all seven products in a catalog to two categories within the same catalog, the Catalog Detail page may show more products categorized than the total products in the catalog, as shown at right.

Catalog: Demo Catalog

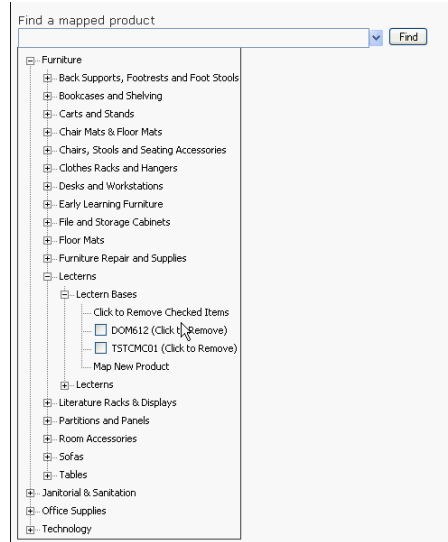
<b>Products</b>	
Total Catalog Products	7
Total Products that are not Categorized	7
Total Products that are Categorized	14
<a href="#">Manage Catalog Products</a> <a href="#">Map Products to the Catalog</a> <a href="#">Quick Map Products</a> <a href="#">Manage Categories</a>	

### Mapping Custom Items to ECP Categories

Your wholesalers' ECP catalogs use a separate category tree from the Standard category tree.

For Enhanced Search and Product Detail features, your wholesaler/Enhanced Content Provider has separate Category Trees. (Enhanced category trees are separate from the structure used by Standard Browse and Favorites; see previous pages,

If you don't map ECP categories for your custom items, they are by default listed in the Miscellaneous category of Enhanced Browse Catalog pages. Uncategorized items in your custom ECP catalog will *not* display among Similar Products, because they are generated in part by category name.

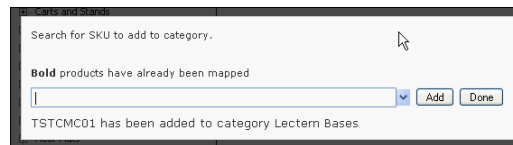


**Note:** Wholesalers are subject to update their category trees at quarter-end or with the release of a new general line catalog. If you previously created an ECP category structure, you are advised to browse your site periodically, make sure all your custom categories still exist, and re-map as needed.

To map your custom products to the ECP category tree, follow these steps:

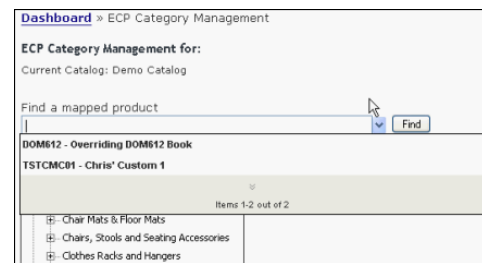
16. In the Catalog Detail page for your ECP-authorized catalog, click **Add Categories from ECP**.
17. In the ECP Category Management page, click the **down arrow** to display the ECP category tree.
18. Click the **+ plus icon** to drill down to additional levels.
19. To add a new product to the current catalog, press the A hotkey.
20. Click **Map New Product**.

21. Begin entering a **SKU** to add to the category.  
As you type, the drop-down list skips to the product SKU(s) that match.



22. Select the desired SKU, and click **✓** to save this item to this category. The box will confirm that the item you selected has been added to the category you selected. Repeat this step for all products you wish to add to the current category.
23. When you are finished adding products to the current category, click **✗ Done**. The items you added will appear above the **Map New Product** link of the category tree.
24. To remove an item, click the box next to the SKU, and select **Click to remove checked items**.

25. To find an item you have previously mapped:
  - Enter the **SKU** in the Find a mapped Product field. The drop-down skips to a matching SKU.
  - Select the desired SKU, and click **Find**. The tree opens to the first instance of the matching SKU.



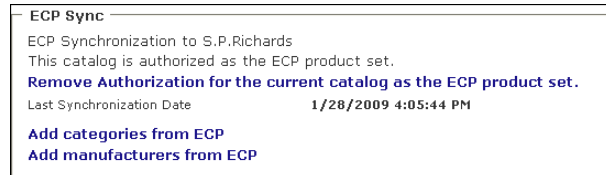
### Add Manufacturers from ECP

If you use the S.P. Richards Enhanced Content Provider (ECP) feature, Version 8.1 lets you map your items to specific manufacturers.

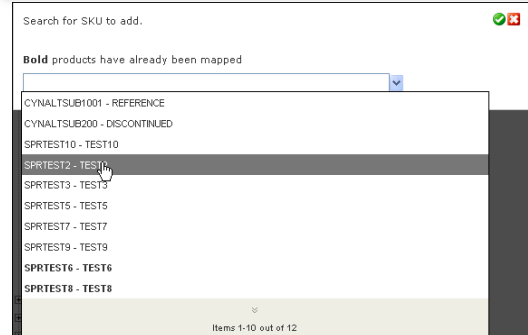
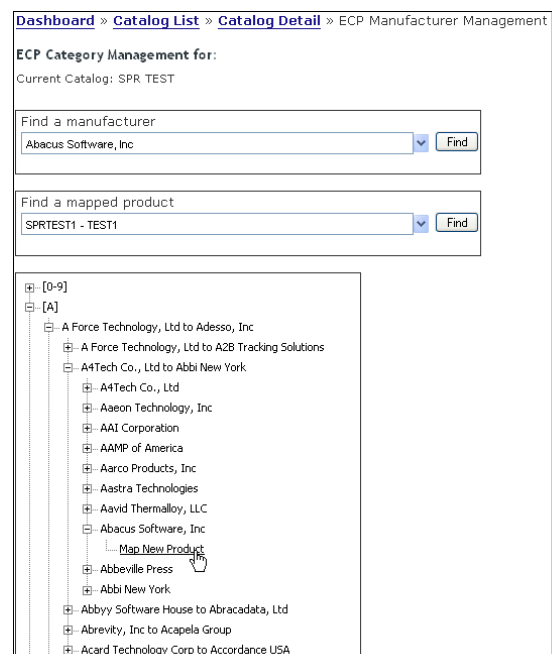
Once the authorized product set has been sent to S.P. Richard’s third-party content provider (Etilize) with the default manufacturer mapping, you can use ECP Category Management to specify and synchronize manufacturers for products within the authorized product set.

Once you choose a manufacturer for the item, the manufacturer is also synchronized with that item in Etilize’s data center.

To map your custom products to the manufacturer:



1. From the Catalog Detail page that lists your ECP authorized catalog, click the **Add Manufacturers from ECP link**.
2. On the ECP Category Management page, click the down arrow in the **Find a Manufacturer** box to display the available manufacturers.
3. Click the Manufacturer to use.
4. Click the **Find** button.
5. Click the + (plus button) to display additional manufacturer levels.
6. When the appropriate level opens, click the **Map New Product** link.
7. Click the **SKU** box and enter part or all of the item number. The system displays a drop down list of the item that most closely matches the item you specified. (Items in bold text have already been mapped.)
8. Select the item and click **Save**. The confirmation message appears “[XXX] Has Been Added to Manufacturer [YYY].”
9. Repeat Steps 8-9 to add as many items to the current manufacturer as needed. When finished, click **X** to close the dialog box.
10. The items you added appear above the **Map New Product** link.
11. Repeat steps 2-11 to map products to different manufacturers as needed.
12. To remove an item, click the check box beside the item. Then, click the **Click to Remove Checked Items** link.
13. To find an item you have previously mapped:
  - Enter the **SKU** in the Find a mapped Product field. The drop-down skips to a matching SKU.
  - Select the desired SKU and click **Find**. The tree opens to the first instance of the matching SKU.



### (Optional) Review CCI and ECP Synchronization Logs from AdminSite Menu

Any time you add, remove, or edit custom items, item rankings, category or manufacturer mappings, or contracts and laundry lists, affected lists are queued for the nightly Catalog Combination Indexing and Enhanced Content Provider synchronization. The server logs details of the activity. Effective in version 8.1.0 and higher, you may view the logs for your site by following these steps:

1. Click the **AdminSite** menu, then click **ECP Sync Log**.

#### View Catalog Combination Index (CCI) Log

2. To view the history of Catalog Combination Index synch with your current enhanced content Provider, click **CCI Log**.
3. If your list has been set up to synchronize, it will appear on the grid. Each column heading can be clicked to re-sort the data. For example, click the Site Name column heading to re-sort by site name from ascending to descending order.
  - **Site Name:** Displays the name of the site.
  - **List Name:** Displays the CCI name from the Catalog Combination Index page.
  - **Sync Status:** Displays the status of synchronization. If the status is locked or has failed, you can click the Requires Synchronization button to queue this list for synchronization again. Once clicked, the Requires Synchronization button is replaced with the Requires Synchronization text, and a sync log record will be added.
  - **Last Sync Date:** Displays the last date and time the CCI was successfully synchronized. The system defaults to sort by Last Sync Date in descending order.
  - To **sort** the grid alphanumerically by a column, click its column header link.
  - To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter icon to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.
4. Click the **+** plus icon by the site name to view additional information for that row.
  - **Synchronization History** display Modified Date, List ID and Comments (extra information saved with the log record).
  - **Products Stored in ECP Data Center** lists all the SKUs that were stored.

ECP Sync Log : Catalog Combination Index			
This page will allow you to view the history of CCI sync with Enhanced Content Provider.			
Site Name	List Name	Sync Status	Last Sync Date
Dev Demo Site in QA	United/SPR.General Line + No custom catalog group + Lock(B3)	Successfully synchronized	
<b>Synchronization History</b>			
Modified Date	List ID	Comments	
No history data.			
<b>Products Stored in ECP Data Center</b>			
SKU	No products.		
Dev Demo Site in QA    United/SPR.General Line + No custom catalog group    Successfully synchronized			

**View Contract/Laundry List Log (only United Stationers at this time)**


5. To view a history of Contracts and Laundry List synchronization with your enhanced content Provider, click **AdminSite > ECP Sync Log > Contract/Laundry List Log**.
6. If your contracts and laundry lists was queued to synchronize, it will appear on the grid.
  - **Site Name:** Displays the name of the site.
  - **List Name:** Displays “Backend List Set ({1})({2} list(s))” where {1} stands for the top five contract/laundry list that make up the list set and {2} stands for the total count of the contracts and laundry lists in the set.
  - **Sync Status:** Displays the status of synchronization. If the status is locked or has failed, you can click the Requires Synchronization button to queue this list for synchronization again. Once clicked, the Requires Synchronization button is replaced with the Requires Synchronization text, and a sync log record will be added.
  - **Last Sync Date:** Displays the last date and time the contract/laundry list was successfully synchronized. The system defaults to sort by Last Sync Date in descending order.
  - To **sort** the grid alphanumerically by a column, click its column header link.
  - To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter icon to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.
7. Click the **+** plus icon by the site name to view additional information for that row.
  - **Synchronization History** displays Modified Date, List ID and Comments (extra information saved with the log record).
  - **Products Stored in ECP Data Center** lists all the SKUs that were stored.

ECP Sync Log : Contract and Laundry List				
This page will allow you to view the history of contract/laundry list sync with Enhanced Content Provider.				
Site Name	List Name	Sync Status	Last Sync Date	
Documentation	Backend List Set (List + MX)(2 list(s))	Successfully synchronized		
Synchronization History				
Modified Date	List ID	Comments		
No history data.				
Products Stored in ECP Data Center				
SKU				
ESS1602121512				
HON10543MM				
QUA45235				
SEL10191				
KIM01840				
SMD55076				
OKI40468801				
BDY5311				
QUA93336				
MMM6603AN				
Change page: < 1 2 3 4 5 6 7 8 9 10 ... >   Displaying page 1 of 921, items 1 to 10 of 9203.				

**View Ranking Log**


To rank items along with Enhanced Content, you use the **Merchandising Products** admin page from the Marketing Tools menu to map items to Ranking Icons, and click **Enable and Synchronize Existing Ranked Products Now** (See Manage ECP Ranking on page 31.).

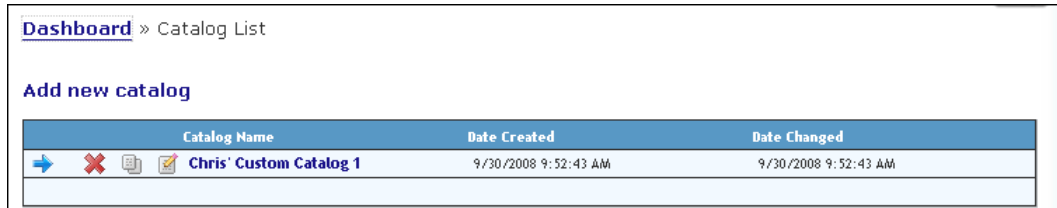
Effective in Version 8.1 and higher, the ECinteractive server uploads wholesaler product rankings as a separate ranking list along with the CCI, and logs this process in the Ranking Log. As a result, this log works similar to the CCI Log, with the exception of using a unique Ranking List ID when displaying synchronization history.

8. To view a history of Ranking Lists uploaded to your enhanced content Provider, click **AdminSite > ECP Sync Log > Ranking Log**.
9. If your contracts and laundry lists was queued to synchronize, it will appear on the grid.
  - **Site Name:** Displays the name of the site.
  - **List Name:** Displays the CCI name from the Catalog Combination Index page, just as it does on the CCI log.
  - **Sync Status:** Displays the status of synchronization. If the status is locked or has failed, you can click the Requires Synchronization button to queue this list for synchronization again. Once clicked, the Requires Synchronization button is replaced with the Requires Synchronization text, and a sync log record will be added.
  - **Last Sync Date:** Displays the last date and time the contract/laundry list was successfully synchronized. The system defaults to sort by Last Sync Date in descending order.
  - To **sort** the grid alphanumerically by a column, click its column header link.
  - To **filter** by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter icon to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.
10. Click the  plus icon by the site name to view additional information for that row.
  - **Synchronization History** displays Modified Date, List ID (unique to this ranking list) and Comments (extra information saved with the log record).
  - **Products Stored in ECP Data Center** lists all the SKUs that were stored.

## Assign Custom Catalogs to Customers

### (Optional) Consider Copies of Your ECP-Authorized Base Custom Catalog

You can make copies of your base custom catalog as needed, and customize them for individual customers if necessary. (In the Custom Product Management Dashboard, click Show All Catalogs. To make a copy of the selected catalog (as shown below), press C or click the  Copy button, and rename the “Copy of” catalog as needed. Then you can add or remove items, map categories, and set up your Custom Catalog Groups as needed.)



However, multiple catalogs can be difficult to maintain, as wholesalers are subject to make adjustments to category tree structures.

If you need to set limits on the items your customers can shop, consider using your backend contracts or laundry lists and the online limit features. See your system’s documentation and the ECinteractive tech note, Lock Shoppers to Contracts/Laundry Lists ([www.ddms.com/Resources/Support/faq/ecommerce/ecLockContractLL.pdf](http://www.ddms.com/Resources/Support/faq/ecommerce/ecLockContractLL.pdf))

### Change Your Site’s Global Catalog Group

When you create a global catalog group, you can limit the number of global catalogs your site uses. This can speed up the catalog search results, and may prevent overloading the servers.

When using site catalog groups, only catalogs whose providers are authorized to your site and ECP-hosted catalogs assigned to your site can be selected. It is important to remember the ECP-hosted catalogs are not custom catalogs. They represent global catalogs hosted by the ECP. You have the option of creating your site’s catalog group with the ECP-hosted catalogs as part of the group if the site is authorized to access the catalogs

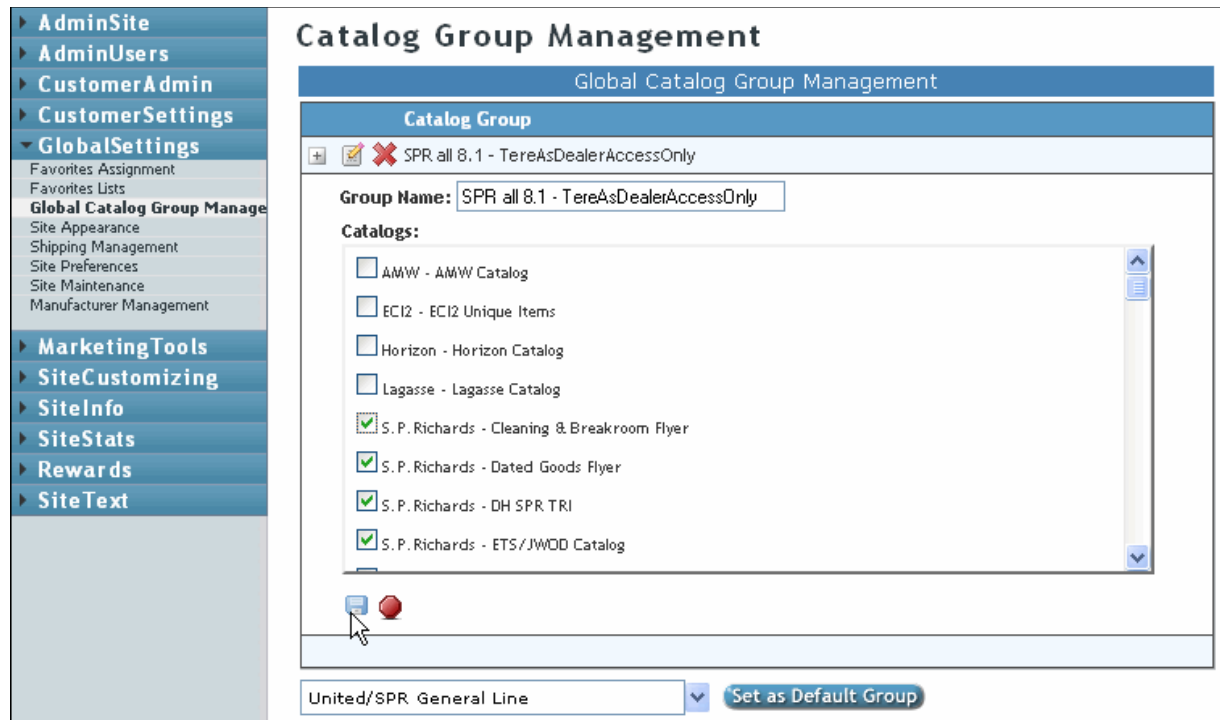
(Effective in Version 8.1, the Global Catalog Group Management web page allows dealers to change their global catalogs without having to contact ECi Technical Support.)

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Note: Changes will take effect after the nightly CCI reindex.

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



2. In this Catalog Group Management page you have the following options:


- Click the **+** **plus icon** to the left of the site group to view a list of catalogs associated with the group. Click the **–** icon to hide the catalogs again.
- Click  to edit existing site group catalogs. You can select or de-select catalogs for the site group. When finished, click Save.
- Click  to delete a site group. At the Are You Sure prompt, click OK.
- Click the **Add New Group** button. To add a new site global catalog group:
  - a. Click the **Catalog Group Name** box and enter the name to use.
  - b. Click the check box corresponding to the **Catalog** to use for this group name. You can select as many as needed.
  - c. When finished, click the  **Save** button. The confirmation message appears, “Change Has Been Accepted, Catalog Combination Index Will Be Regenerated and Effective the Following Day.” To immediately view the index status, you can click the **Index Status** link.
  - d. To specify a default site group, click the down arrow in the list and click the **Set as Default Group** button. The default setting is saved.

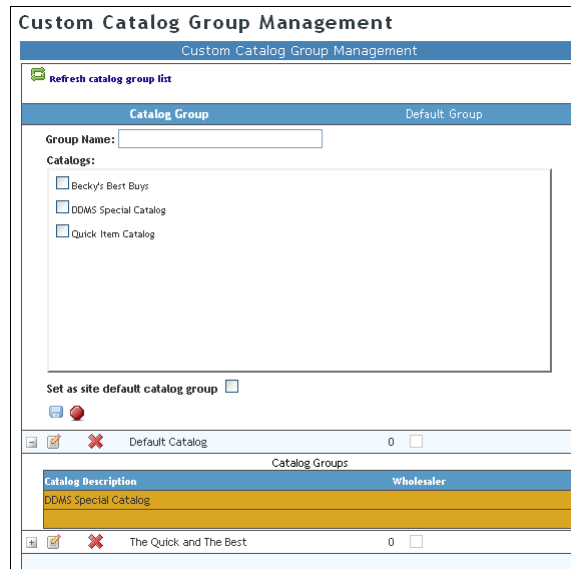
## Set up Catalog Groups






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 your custom catalog(s).

1. In your **Admin Control Panel**, you can get to Custom Catalog Group Management by first clicking:

- **SiteInfo** in the left side navigation menu.
- **Product Management** in the top navigation menu.

2. To add a new custom catalog group, click  **Add New Group**.
3. 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.
4. In the **Catalogs** box, click the checkbox(es) to select the custom Catalog(s) you wish to add to the group.
5. If you wish the current catalog group to be used as a default when you create new Customers and Customer Groups, click **Set as site default catalog group**. If it is not the default catalog group, clear the box.



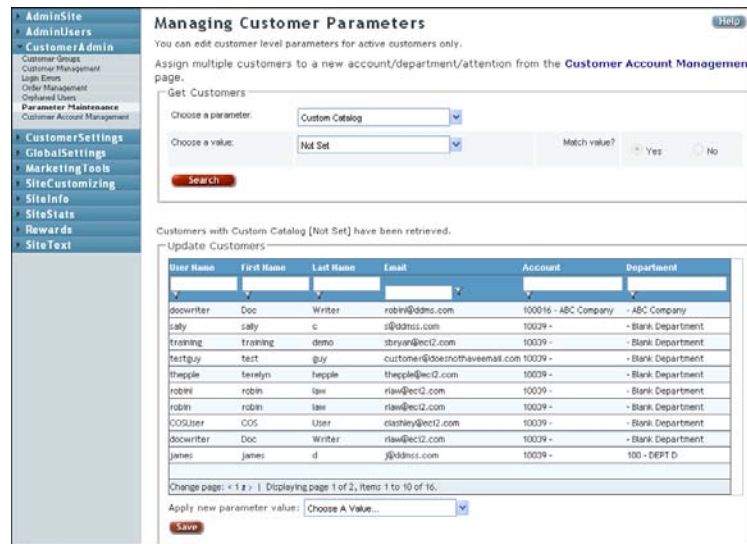
6. Click . After saving one or more Custom Catalog Groups, you have additional options:
  - Click  to Refresh the catalog group list.
  - Click  to expand the saved Catalog Groups to view the custom catalogs that belong to them.
  - Click  to edit an existing catalog group. Any changes you make to an existing group affect all shoppers with the assigned custom catalog group.
  - Click  to delete an existing catalog group. At the Delete This Catalog Group prompt, click OK.
7. Changes will be effective the following day, after the system generates your site-specific Catalog Combination Index during its nightly scheduled processes.

### Mass Change Existing Customer Parameters for Custom Catalogs


1. Click **Parameter Maintenance** in either the **CustomerAdmin** left side menu or the **Consumer Admin** top menu.

2. In the **Choose a parameter** drop-down box, click **Custom Catalog**.

3. In the **Choose a value** drop-down box, click **Not Set**, or the name of an existing custom catalog group that you wish to change. This will set the limits to retrieve the customers where you want to apply a new Custom Catalog Group.



4. The grid allows various ways to navigate and drill down to more narrow limits:

- To sort the grid alphanumerically by a column, click its column header link.
- The footer lets you navigate between multiple pages within the list, by specifying a page number or clicking **Next** and **Previous**.
- To filter by keywords within a column, click the blank below the column header, enter a keyword, and click the  Filter button to choose an operator, such as EqualTo, Contains, IsEmpty, and so on. For example, you could limit to specific Accounts.


5. In the **Apply new parameter value** drop-down box, click the name of the **Custom Catalog Group** you wish to assign, such as your default.

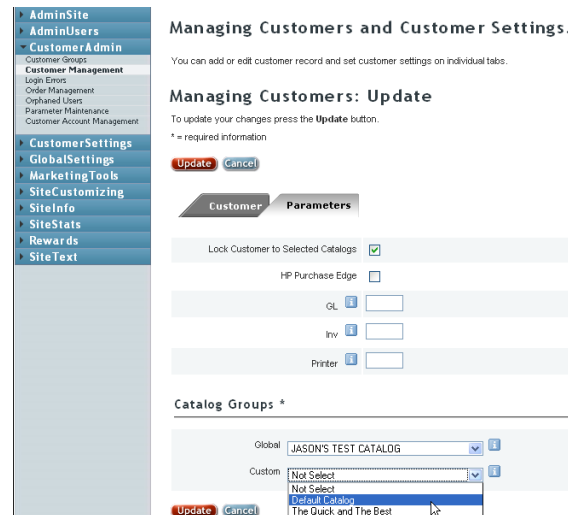
6. Click **Save**. Changes will be effective the following day, after the system generates customer-specific Catalog Combination Indexes during its nightly scheduled processes.

7. Repeat as needed for other limits.

### Assign Custom Catalog Groups to Guest or Individual Customer Accounts

You can assign your new custom catalog groups to individual customer accounts, or to your Guest account.

1. In the **CustomerAdmin** left side menu, click **Customer Management**.
2. **Search** for the customer you wish to search on these products via the Enhanced Search.
3. For the desired customer, click  to view their settings, and click **Edit** to change them.
4. In the **Parameters** tab, add or edit the users' **Custom Catalog Groups**, as shown in the figure here, to select the group where you have set up the Enhanced Content.
5. Click **Update**. This will trigger a new CCI to be created.

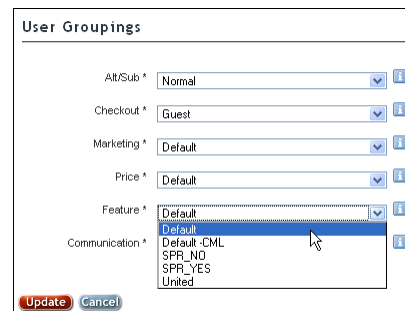


You can also use this page to edit Guest users and add your Demo users. For detailed instructions, see your online help.

### Assign Enhanced Content Feature Setting

In order to view your custom catalog information, the user must be assigned to a Feature setting group that has Enhanced Content enabled.

6. In **Customer Management**, in the **Customer** tab, click **Edit**.
7. Under **User Groupings**, select the **Feature** group that has the Enhanced content features enabled, as shown in the figure here. For more details, see the following support documentation on our Web site:
  - Setting Up United Enhanced Content in ECinteractive
  - Setting Up SPR Enhanced Content in ECinteractive



### Allow an Evening for Systems to Index and Pipeline

Changes are effective the following day, after the system generates your site-specific and customer-specific Catalog Combination Indexes (CCIs) during nightly scheduled processes.

This also gives your Enhanced Content Provider's system time to run your custom catalog content data through its Pipeline process.

If you've planned a customer launch or prospect demonstration, we recommend a quick rehearsal test of the items your customer should expect to see. Plan this rehearsal after the system indexing/pipelining and at least a day ahead of your scheduled launch or demo.

This gives you enough time to make any necessary corrections or adjustments and allow synchronization and indexing to occur after hours before your demo.

## (Optional) Promote Your Items

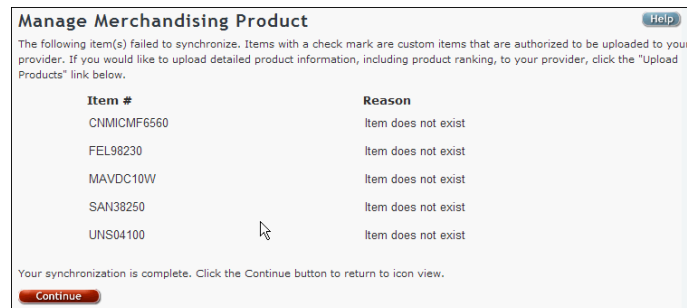
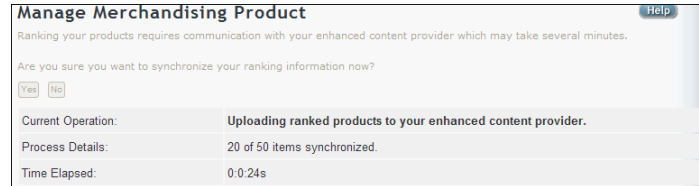
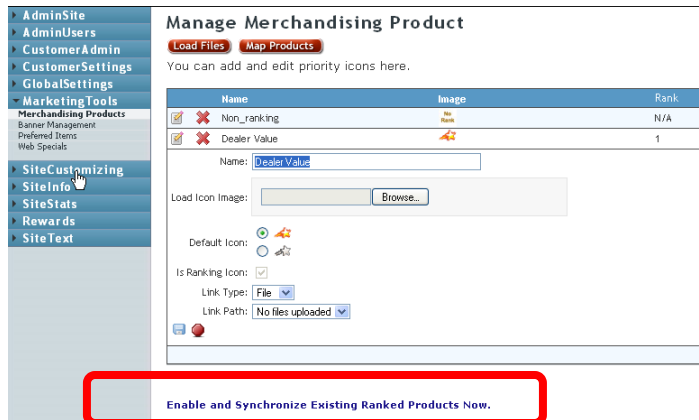
### Manage ECP Ranking

On your shopping site, various pages include lists of products: Advanced Search Results, Contracts, Laundry List, Favorites, and Web Specials, and Enhanced Search Results.

For ranking items in standard product lists, you can use the Merchandising Products ranking icons grid under Marketing Tools to prioritize the First In Display order you wish certain items to appear on these lists.

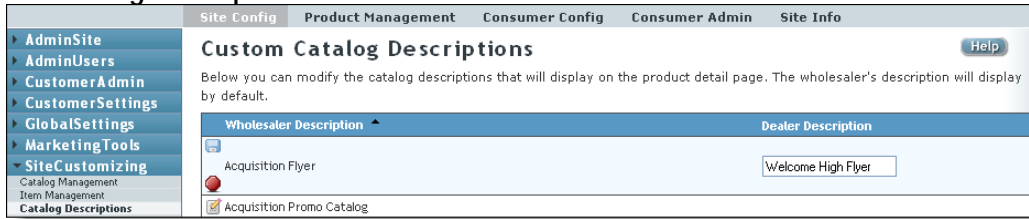
To rank custom items in Enhanced Search results:

1. Make sure all items you wish to add to the ECP ranking list already exist in enhanced content. Each item you wish to rank must exist in either your wholesaler's enhanced catalog, or in your ECP-authorized custom catalog.
2. In the **Marketing Tools** left side menu, click **Merchandising Products**.
3. For detailed instructions on prioritizing manufacturers, mapping individual products to your site icons, and (optional) loading custom icon image files, see your online help or *Customizing Item Ranking and Sorting* on the ECinteractive support site.
4. Once you have products mapped to Ranking Icons, click **Enable and Synchronize Existing Ranked Products Now**. During the process, the screen indicates progress details and elapsed time.
5. If exceptions occur in this process, your ECP will return a report. You may need to upload your custom item information.
6. When you are finished, click **Continue**.





**Note:** The ranking results within Enhanced Content product lists depend on your wholesaler's search algorithms, the ECP categories you've mapped with your custom items, and the timeframe for background CCI indexing and ECP pipelining. As a result, your custom items may not display at the top of the list as expected.

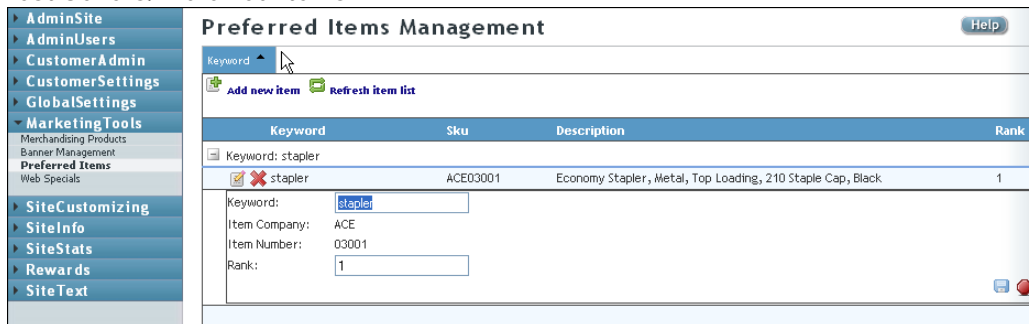
## Customize Catalog Descriptions










On your shopping site, the Product Detail displays a catalog description provided by your wholesaler or supplier. To have your own description displayed instead, follow these steps:

1. Click **Site Customizing** and select **Catalog Descriptions**. The Custom Catalog Descriptions page opens.
2. Click the  **Edit** icon next to the catalog description you wish to change.
3. In the **Dealer Description** box, enter the text for this catalog.
4. Click the  **Save** icon.

## Create Best Sellers/Preferred Items



You can rank items to appear when the shopper performs advanced searches. The items you select appear in the Best Sellers column of the Search Results page. The higher the item rank you select, the higher the item appears in the product list. Follow these steps:

1. Click **Marketing Tools** and select **Preferred Items**.
2. The **Preferred Manufacturer Management** page opens. You can:
  - Click  to display item details.
  - Click  to edit the item. Replace the information. Click .
  - Click  to delete a preferred item. At the Are You Sure prompt, click **OK**.
  - Click  **Add New Item**.
  - Click  to refresh the page.
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 descriptions provided by the wholesalers. 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 .

## Create 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.

SKU	Description	UM	Price	BeginDate	EndDate
<input type="checkbox"/> <input type="checkbox"/> AAGPM17028	Thing	EA	\$40.00	8/14/2007	8/14/2008

Add, Edit, or Delete Existing Web Specials

SKU: AAGPM17028  
 Description:   
 UM:   
 Price:   
 BeginDate:    
 EndDate:

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

1. Click **Marketing Tools** and select **Web Specials**.
2. Click **Add New Web Special**.
3. Click the **SKU** box and enter the company prefix and item number.
4. Click the **Description** box and enter a descriptive name for this web special. You can enter a maximum of 30 characters. (The cursor does not move to the UM box. The unit of measure automatically displays from the backend system when you retrieve the item.)
5. Click the **Price** box and enter the special sell price.
6. 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.
7. Click the **End Date** box and enter the date the special ends. You can forecast dates, if needed. To select a date from a calendar, click . The default is one year in advance of the system date. For example, if the system date is 04/02/08, this box displays 04/02/09.
8. 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.
9. Click to edit an existing web special. Enter the new information over the existing information and click .
10. Click to delete an existing web special. At the Delete Selected Specials prompt, click **OK**.

## Create Global Favorites Lists and Assign them to Customers

You can create a Favorites List to give shoppers easy access to products they purchase frequently. Then, you can assign each Favorites List to your customers. You have the option to 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.

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. While shoppers can manage the Favorites lists they create, they cannot edit or change the Favorites lists dealers set up and maintain.

To set up Admin Favorites Lists, go to **Global Settings** and click **Favorites Lists**. Then, to assign Favorites Lists to customers, go to **Global Settings** and click **Favorites Assignment**. For detailed instructions, see your online help.

**Manage MyFavorites Lists** Help

Create MyFavorites lists to save and organize your customers' frequently purchased items or contract items. To work with a MyFavorites list, select it from the list at the left. You may also create new lists. After building MyFavorites lists, you can **assign them to customers**.

**Current MyFavorites Lists**

Description	Comments	Type	Modified	Created	Items
My Favves	Comments	Shared Site Wide	11/13/2007	11/13/2007	2
New Favves	Comments	Shared Site Wide	11/13/2007	11/13/2007	0

Description:

Comments:

Type:  (Dropdown menu open showing: Shared Site Wide, Inactive, Shared Site Wide, Shared With Account/Department)

**Assign Favorites** Help

Assign Favorites List:

to Account

to Department

**Assigned Favorites List**

List Name	Account	Department
QA Favorite List 2	HAPPY	None