



2009 REGIONAL USERS MEETINGS

*Migrating Customers
to ECinteractive™ or
is.D-Force2™*



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Using the Migration Tool

This handout includes instructions for migrating your end users for use with ECinteractive or is.D-Force 2. After end users are migrated, they have access to the new ECinteractive or is.D-Force2 Web sites.

Before you migrate any end users, we strongly recommend that you assign them to groups. Grouping users with similar settings gives you more control over the migration process. It also provides another opportunity to examine the settings that your end users have currently been granted. You can determine which users to group according to their substitute settings, checkout settings, price settings and so on. Once the groups are set, you can begin migrating your users, one group at a time, providing a smoother transition for you and your customers.

Before You Begin


- Print and determine your groups in Dealer Station or is.D-Force
- Specify customer settings in ECinteractive or is.D-Force 2
- Create groups in ECinteractive or is.D-Force 2
- Tie global and customer specific catalogs to customers in ECinteractive or is.D-Force 2
- Add accounts in ECinteractive or is.D-Force 2
- Add users to a file to export in Dealer Station or is.D-Force.

After You Migrate Users

- Print Approval Chain Reports in Dealer Station or is.D-Force
- Update the approval chain information for the user in ECinteractive or is.D-Force 2.

Print and Determine Groups

Before you migrate any users, we recommend you print a report that displays a list of users to be migrated. When creating this report, you are prompted to save it to a CSV file. Once the file has been printed and saved, it can help you determine the groups that should be created before making any migrations.

- 1 Log into your Dealer Station or is.D-Force Administrative page.
- 2 Click . The Export Main Menu page opens, as shown in Figure 1.
- 3 Click the Reports link. The system opens a new page with a list of reports to print.

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If you make a mistake while setting limits, click Reset Values. The page is cleared so you can begin setting limits again.

- 4 Click the Customer Groups link.
- 5 The report limit options appear, as shown in Figure 2. You can use this page to limit the users on the report.

Login Date Filter: Click the After and Before boxes to limit the report by user login date.

Account Filter: Click this box to limit the report by customer account number.

Include Users That Have Never Logged In: Click this box to include end users that have never previously logged into the Dealer Station or is.D-Force site.

Groups: Click each box corresponding to the settings by which to limit. For example, to limit the report by customer price settings, check the Customer Price Settings check box. While you can select as many groups as necessary, you must select at least one group limit.

Note: The Customer Default Account option under the Groups heading is required. This box is automatically checked by default.

- 6 When you finish, click Run Report. The system displays the report according to the limits you set.
- 7 You can now export the information to a CSV file. The system provides two options: Export CSV File and Export Compact CSV File. We recommend you export using the Export Compact CSV option.
- 8 After you specify to export the data, the system prompts you to open or save the report to a file. Once the file has been opened or saved, you can easily view and print the information and use it to determine your groups.

Figure 1: The ecInteractive Export Main Menu Page

SITE MANAGEMENT	
Admin Home	
Site Text	[Dealer] [Reports] [User Export]
Site Info	
Site Style	
Site Preference	
Checkout Preferences	
Catalog Management	
Rewards	
Default User Settings	
User Accounts	
Admin Favorites	
System News	

Main Menu:	
Export Site Text	<input type="text" value="Check out our new and improved storefront!!!!"/>
Export Link Text	<input type="text" value="ecinteractive"/>
PLEASE DO NOT MODIFY THIS INFORMATION ecInteractive ID	<input type="text" value="http://207.126.108.178/ecinteractive1"/>
PLEASE DO NOT MODIFY THIS INFORMATION ecInteractive Storefront URL	<input type="text" value="http://207.126.108.178/ecinteractive1"/>
PLEASE DO NOT MODIFY THIS INFORMATION ecInteractive WebService URL (ECI)	<input type="text" value="http://207.126.108.197/ecinteractiveWS/ecinteractiveWS.asmx/StringRequest"/>
PLEASE DO NOT MODIFY THIS INFORMATION DS WebService URL (ECI)	<input type="text" value="http://207.126.108.197/ecinteractiveWS/DealerStationWS.asmx"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Delete"/>	

Create Groups

Once you have printed and determined which users to group and have specified your customer settings, you can create the groups.

- 1 Log into the ECinteractive or is.D-Force2 administrative site.
- 2 Click Customer Admin and select Customer Groups. The Customer Group Setup page opens.
- 3 The Customer Group box defaults to New Customer Group. Click the Description box and enter a name for this grouping, Customer Migration 1, for example. See Figure 3.
- 4 The Account and Department boxes let you limit the group to a specific customer account and/or department.

To limit to a specific customer account, click the Account box and enter the account number.

To limit to a specific customer account and department, click the Account box and enter the account number. Click the Department box and enter the customer's department.

Figure 3:
Entering a
Customer
Group
Description

Customer Group Setup [Help](#)

Select Customer Group

Customer Group: <New Customer Group>

Description: Customer Migration 1

Dealerstation Conversion (optional)

Customers coming over from Dealerstation with the selected account & department will be assigned to the settings in this customer group.

Account: []

Department: []

User Groupings

Alt/Sub * QA ALTSUB "AUTOMATIC" [i]

Checkout * Default [i]


Marketing * Default [i]

Price * Default [i]

Feature * Default [i]

Communication * Default [i]

- 5 The User Groupings section of the page lets you assign the settings to this group. You can limit this group by alternate and substitute settings, checkout page settings, and so on.

Click the down arrow in each box and select the settings for the group. To view information, click  corresponding to each setting. The options appear on the right side of the page, as shown in See Figure 4.

- 6 When you finish, click Save.
- 7 Continue to set up as many groups as necessary.







Tie Global and Customer Specific Catalogs to Customers

You can use this optional step to tie both global and specific catalogs to the users you export.


- 1 Log into the ECinteractive or is.D-Force2 administrative site.
- 2 Click Customer Management.
- 3 When the Managing Customers page opens, retrieve the customer.

Figure 4:
Viewing
Checkout
Default Settings

User Groupings

Alt/Sub * <input style="width: 80%;" type="text" value="Normal"/> 	Checkout: <i>Default</i>
Checkout * <input style="width: 80%;" type="text" value="Default"/> 	Override Budget Hold: No
Marketing * <input style="width: 80%;" type="text" value="Default"/> 	Override Credit Limit Hold: No
Price * <input style="width: 80%;" type="text" value="Default"/> 	Override Past Due Hold: No
Feature * <input style="width: 80%;" type="text" value="Default"/> 	PO Required: No
Communication * <input style="width: 80%;" type="text" value="Default"/> 	Long PO Required: No
	Allow Long PO Edit: Yes
	Accept Credit Cards: Yes
	Credit Card Required: No
	Modify Shipping Address: Yes
	Allow User to Choose Shipping: Yes

Migration Customers to ECinteractive™ or is.D-Force2™

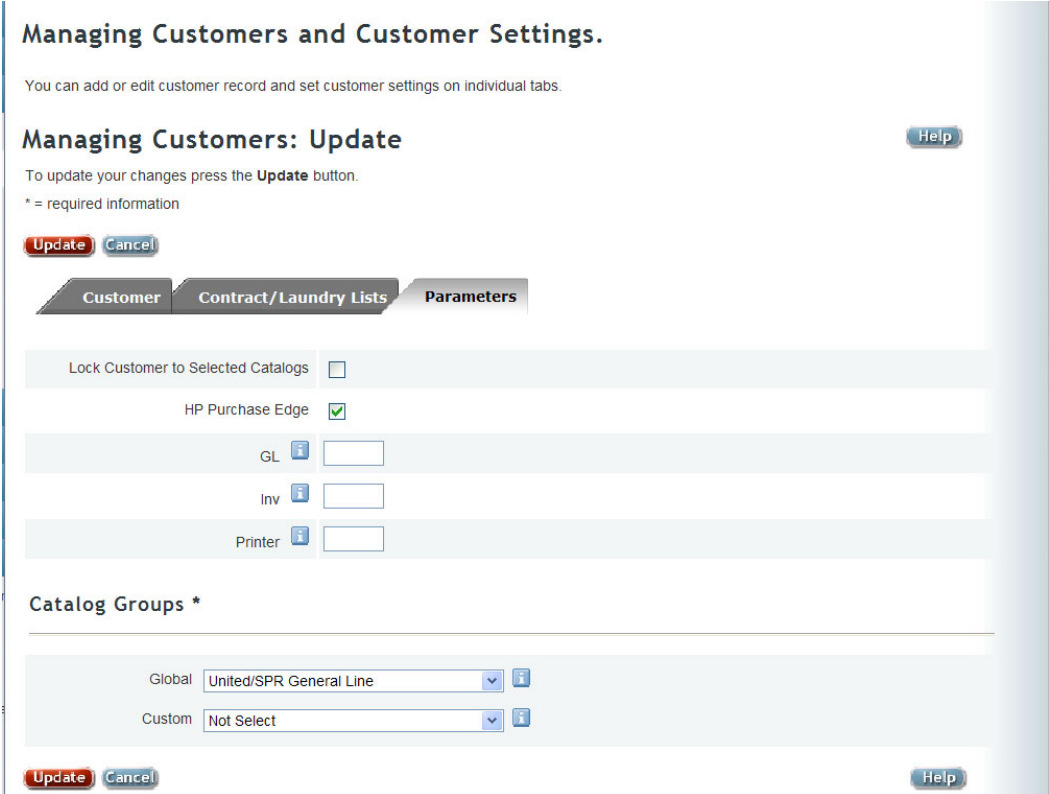
- 4 After you retrieve the customer, the Managing Customers: Edit page opens.
- 5 Click the Edit button.
- 6 The Managing Customers: Update page opens. Click the Parameters tab, as shown in Figure 5.
- 7 In the Catalog Group section, click the down arrow in the Global and Custom boxes to select the catalog for this user. Click  to view additional information.
- 8 When finished, click Update.

Add Accounts

After you create groups, you must add accounts.

- 1 Log into the ECinteractive or is.D-Force2 administrative site.
- 2 Click Site Info and select Location Management. The Location Setup page opens.
- 3 Click Account Management. The Create Account and Location Association page opens.

Figure 5: The Parameters Tab



Managing Customers and Customer Settings.

You can add or edit customer record and set customer settings on individual tabs.

Managing Customers: Update Help

To update your changes press the **Update** button.


* = required information


Update **Cancel**


Customer **Contract/Laundry Lists** **Parameters**

Lock Customer to Selected Catalogs


HP Purchase Edge


GL 

Inv 

Printer 


Catalog Groups *

Global 

Custom 

Update **Cancel** Help

Migration Customers to ECinteractive™ or is.D-Force2™


- 4 Click  Add New Account.
- 5 In the Selection Location drop down list box, click a location.
- 6 Click the Account Nbr box and enter the customer's account number.
- 7 Click the Account Printer box and enter the logical name of the printer to use, P1 or P2, for example.
- 8 When you finish, you must synchronize departments for all accounts or for selected accounts.

To synchronize departments for selected accounts, click the check box to the right of each account to include and click Sync Departments for Checked Accounts.

To synchronize departments for all accounts, click Sync Departments for All Accounts. If you click Sync Departments for All Accounts, the process can slow down your system. We recommend you perform this function after regular business hours.

- 9 To save your changes, click .

Changing Site and Link Text

- 1 Log into your Dealer Station or is.D-Force2 Administrative page.
- 2 Click . The Export Main Menu page opens. You can use two boxes to change the information that appears on the end user's page after the migration process is complete.

Export Site Text: Click this box to change the text that appears on the end user's main site.

Export Link Text: Click this box to change the text for the ECinteractive or is.D-Force2link that appears on the end user's page.

Note: The ECinteractive ID, ECinteractive Storefront URL, ECinteractive Webservice URL, and DS Webservice URL default to the Web site addresses for use with ECinteractive. *Do not change these addresses unless instructed to do so by ECI.*

- 3 When you finish changing the text, click Save.

Add Users to a List to Export

After your groups are created, you can begin adding users to a list. Once the list is correct, you can export it, so the user can log into ECinteractive or is.D-Force2.

- 1 From the Export Main Menu page, click the User Export link, as shown in Figure 6.
- 2 To create a list of users to migrate, click Add Users.
- 3 A new page opens, as shown in Figure 7. You can use the following boxes to set limits for the users to be exported during this process.

Allow Dealer Station Login: Check this box to allow the user to log into the Dealer Station or is.D-Force2 Web site.

Customer Groups: Click the down arrow in this box to select a group of users to export.

Global Catalog Groups: Click the down arrow in this box to select a global catalog group for the users you are exporting.

Custom Catalog Groups: Click the down arrow in this box to select a custom catalog group for the users you are exporting.

Account Filter: Click the down arrow in this box to limit the users to migrate by account number.

- 4 Click Export Users. The migrated users can now access the ECinteractive or is.D-Force2 Web site.

The groups shown in the Customer Groups box are directly received from your ECinteractive or is.D-Force2 site.

Figure 6: The User Export Link

Main Menu:
[Dealer] [Reports] [User Export]

Export Site Text

Export Link Text

PLEASE DO NOT MODIFY THIS INFORMATION
ecInteractive ID

PLEASE DO NOT MODIFY THIS INFORMATION
ecInteractive Storefront URL

PLEASE DO NOT MODIFY THIS INFORMATION
ecInteractive WebService URL (ECI)

PLEASE DO NOT MODIFY THIS INFORMATION
DS WebService URL (ECI)

[Save] [Reset] [Delete]

Editing and Deleting the User's List

Once the end user has been migrated, the only information you can change is the ability for the user to log into the Dealer Station or is.D-Force Web site. The only user you can delete from the list is one who has not previously logged into the ECinteractive or is.D-Force2 Web site.

- 1 From the Export Main Menu page, click the User Export link.
- 2 Select the user to view.
- 3 A new page opens, listing the user's first and last name, email address, date of the user's migration, and login ability. See Figure 8.

To edit a user on the list, click the user's name. If the user has the ability to log into the Dealer Station or is.D-Force site, the DS Login box is checked. To edit this ability, check or uncheck the box. Click Edit Users.

To delete a user from the list, click Delete Users. The system opens a new page with a list of users to remove. You can only remove users who have not previously logged into the site. Click each user to remove from the list. Click Delete Exported Users.

Main Menu:

[\[Dealer\]](#) [\[Reports\]](#) [\[User Export\]](#)

Users Menu:

[\[Edit Users\]](#) [\[Add Users\]](#) [\[Delete Users\]](#)

Adding users to the exports list. Users don't get exported till they log into ecinteractive

Allow Dealer Station Login

CustomerGroups

GlobalCatalogGroups

CustomCatalogGroups

Account Filter

- 0507, 0507
- 0507a, 0507a
- 0507b, 0507b
- 1, APPROVAL
- 1, CatSearchOff
- 1, DeptList
- 10038, approver
- 10038, user
- 1977_2, 1977_2
- 2, APPROVAL
- 3, APPROVAL
- 925580, approver
- A, MonthlyLimit
- a, OrderLimits
- a, RouteCode
- Approver, 2ndLevel
- approver2, approver2
- approver4, approver4
- approver5, approver5
- Barris, George

Figure 7: The List of Users to Export

Accessing the End User Web Site

After the user has been exported, the ability to access the ECinteractive or is.D-Force2 site appears on the end user's Web site.

- 1 The migration process occurs.
- 2 End Users log into the Dealer Station or is.D-Force site and enter their user name and password.
- 3 The end user's site opens and contains new links, as shown in Figure 9. One link appears at the top of the page. Another link appears under the Member Sign On section of the page.
- 4 The user clicks either link, and the new ECinteractive or is.D-Force2 site opens.
- 5 The user clicks the My Account box and enters the Dealer Station or is.D-Force user name and clicks Go.
- 6 Users are then prompted to enter a password, a security question, and a security answer. When this process is complete, the Thank You Web page opens.

Troubleshooting Accessing the End User Site

Your end user could experience two different password issues when logging into the new Web site. One issue concerns upper and lowercase characters. The other issue concerns passwords containing less than six characters. You may decide to discuss these issues with your end users to avoid confusion before they initially log into their new ECinteractive or is.D-Force2 Web sites.

Figure 8: Editing Users

SITE MANAGEMENT	
Admin Home	
Site Text	
Site Info	
Site Style	
Site Preference	
Checkout Preferences	
Catalog Management	
Rewards	
Default User Settings	
User Accounts	
Admin Favorites	

Main Menu:
[\[Dealer\]](#) [\[Reports\]](#) [\[User Export\]](#)

Users Menu:
[\[Edit Users\]](#) [\[Add Users\]](#) [\[Delete Users\]](#)

First Name: geoff
Last Name: wood
eMail: gwood@eci2.com
Exported: 11/03/2006
DS Login:

Dealer Station/is.D-Force Uppercase Passwords

If the end user's Dealer Station or is.D-Force password contains uppercase characters, the uppercase characters are converted to lowercase characters during the migration process — ABCD1234 becomes abcd1234, for example. The user must enter the password in lowercase characters for the system to accept it, as described below.

- 1 The migration process occurs during which password ABCD1234 is changed to abcd1234.
- 2 The end user logs into the Dealer Station or is.D-Force Web site using the normal procedure and specifies the password **ABCD1234**.
- 3 From the Dealer Station or is.D-Force Web site, the user clicks one of the new links to access the ECinteractive or is.D-Force II. See Figure 9.
- 4 The ECinteractive or is.D-Force2 site opens. The user clicks the My Account box and enters the Dealer Station or is.D-Force user name.
- 5 The user clicks Go.

Note: The user name is not case sensitive. This issue only applies when specifying the end user's password.

- 6 The Log In window opens, displaying the user name specified in the My Account box. The user clicks the Password box and enters the Dealer Station or is.D-Force password, **ABCD1234**.
- 7 The user clicks Log In.
- 8 A new window opens, displaying the Current Password, Security Question, and Security Answer boxes.

Figure 9: New Links to ecInteractive on the End User's Web Page

The screenshot shows a web page for 'SANCHEZ TIRE SHOP'. On the right side, there is a vertical navigation menu with the following items: CUSTOMER CENTER, Member Sign On, ecInteractive (highlighted), Logout, Change Dep./Attn., My Account, Edit Budget, Update My Info, My Orders, Order History, Held Orders, and SHOPPING CART. The main content area features a blue-bordered box with the text 'Please check out our new store front!!' and a 'Home' link below it. Below this is the shop name 'SANCHEZ TIRE SHOP' and a paragraph: '. This is your personal home page. Any news about the QA1 he system and let us know if you have any questions.' At the bottom of the main content area is a 'Browse Catalog' link.

- 9 The user clicks the Current Password box and enters the new lowercase password, **abc1234**. As previously stated, the migration process has converted any uppercase characters in the Dealer Station or is.D-Force password to lowercase characters.

Note: If the user enters the uppercase password, ABCD1234, the system displays the error message shown in Figure 10.

- 10 The user clicks the down arrow in the Security Question box and selects a question.
- 11 The user clicks the Security Answer box and enters the answer.
- 12 The user clicks Finish. The Thank You window opens.

The Dealer Station or is.D-Force password remains **ABCD1234** while the new ECinteractive or is.D-Force2 password is **abcd1234**.

Dealer Station/is.D-Force Password Length

If the Dealer Station or is.D-Force password contains less than six characters, WXYZ, for example, a new password must be specified containing at least six characters for use with ECinteractive or is.D-Force2.

- 1 The migration process occurs.

Figure 10: The Error Message that Appears When Specifying an Uppercase Password in the Current Password Box



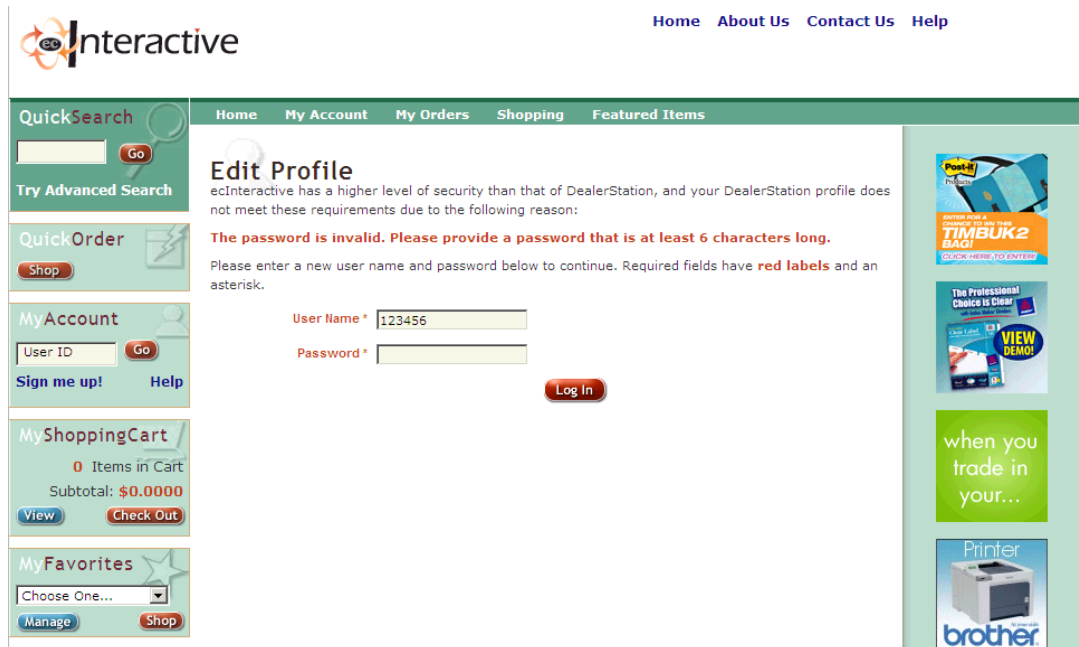
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- 2 The end user logs into the Dealer Station or is.D-Force site using the normal procedure and specifies the password **WXYZ**.
- 3 From the Dealer Station or is.D-Force site, the user clicks one of the new links to access the ECinteractive or is.D-Force2.
- 4 The ECinteractive or is.D-Force2 site opens. The user clicks the My Account box and enters the Dealer Station or is.D-Force user name.
- 5 The user clicks Go.

Note: The user name does not require six characters. This issue only applies when specifying the end user's password.

- 6 The Log In window opens, displaying the user name specified. The user clicks the Password box and enters the Dealer Station or is.D-Force password, **WXYZ**.
- 7 The user clicks Log In.
- 8 Since **WXYZ** is less than six characters, the system displays the Password is Invalid error message, as shown in Figure 11.

Figure 11: The Error Message That Displays When Entering a Password Containing Less Than Six Characters



Users should enter the new six character password they created, WXYZ12, for example.

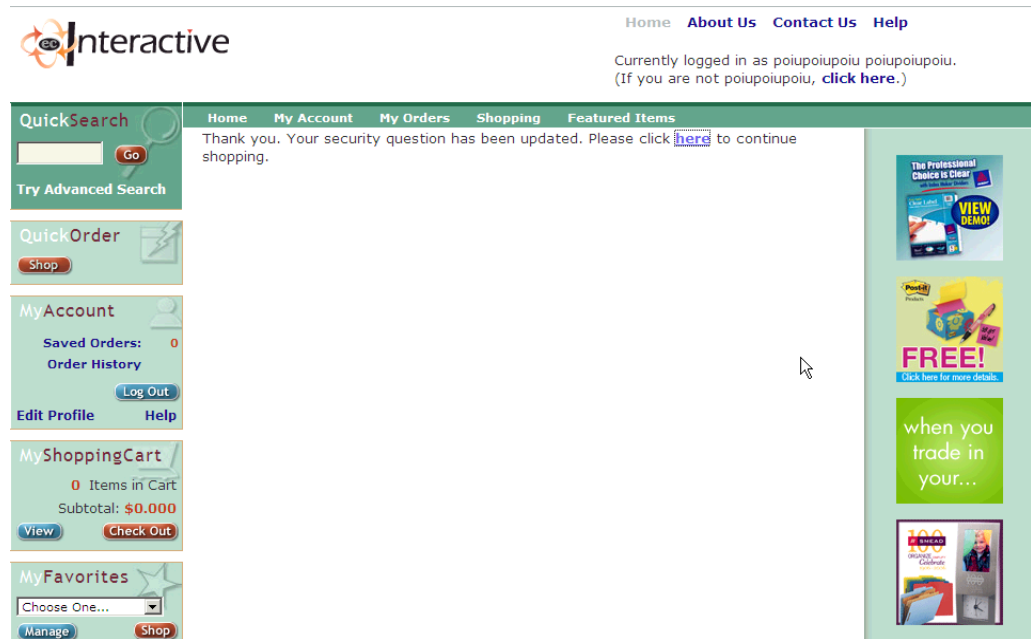
- 9 The user must click the Password box and enter the new password containing at least six characters, WXYZ12, for example.
- 10 After the new six character password is accepted, the end user is prompted to enter a security question and answer.
- 11 After clicking Finish, the Thank You window opens, as shown in Figure 12.
The Dealer Station or is.D-Force password remains **WXYZ** while the new ECinteractive or is.D-Force2 password is **WXYZ12**.

Printing Approval Chain Reports

After the end user has logged into the ECinteractive or is.D-Force2 site and created a password and security question, print the Approval Chain reports. Since the only information not automatically uploaded to the end user's ECinteractive or is.D-Force2 site is the approval chain information, these reports are necessary to manually update the user's approval data.

- 1 Log into your Dealer Station or is.D-Force Administrative Web page.
- 2 Click **ecinteractive Export**. The Export Main Menu page opens.
- 3 Click the Reports link. The system opens a new page with a list of reports to print.

Figure 12: The Thank You Window on the End User's Web Page



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4 Click the Approval Chain By User Report or the Approval Chain by Approver Report.

5 A new Web page opens that lets you further limit the users on the report.

Login Date Filter: Click the After and Before boxes to limit the report by customer login date.

Account Filter: You can use this box to limit the report by customer account number.

Include Users That Have Never Logged In: Click this box to include end users that have not logged into the Dealer Station or is.D-Force Web site.

6 When you finish, click Run Report. The system displays the report according to the limits you set.

7 To export the report to a CSV file, click Export to CSV. The system prompts you to open or save the report to a file. Once the file has been opened or saved, you can easily view and print the information.

8 After the end user has logged into the Web site and created a password and security question, you can use the report to update the user's approval information.