


What It Does

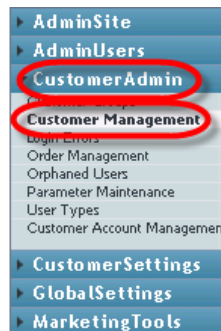
In your backend system, you may have many customer contracts and/or laundry lists set up of items that a customer purchases on a regular basis.

In ECinteractive, these contracts and laundry lists are automatically synchronized from the backend so that you can:

- **Assign** one or more contracts and laundry lists to a customer on an individual basis, so they can view and purchase those items with the proper contract pricing.
- **Restrict** a customer from being able to view or purchase items belonging to a contract you have set up on your backend system. (Restricted items will not show up on your site where that user is logged in. In other words, restricted items are excluded from that user's view.)
- **Lock** a customer to either:
 - **Contracts Only.** All items that are in the assigned backend lists will *override* the customer's Catalog Group settings. In effect, the assigned backend lists become the customer's catalog groups. Note: If you make changes to catalogs in these customers' Catalog Groups, it will have no effect on the Contracts-Only customers. Also, any items that are not in their assigned backend list will not be shown to the user (except in a few cases; see "Exceptions" section).
 - **Include Catalogs.** All items that are in *both* the customer's Catalog Groups *and* the assigned backend Contracts/Laundry Lists are shown to the customer. Note: if none of the items in the assigned backend lists exist in the customer's catalog groups, then no items will appear to the user in the front-end.

How To Do It

1. In your Admin Control Panel's left menu, click **CustomerAdmin** and then click **Customer Management**.
2. Search for or add the record where you wish to adjust contract and laundry list settings.
3. Click the  View button for the account you wish to view.
4. Click the **Edit** button.
5. Click the **Contract/Laundry Lists** tab. There should be a list of Contracts and Laundry Lists that have been synched from your backend system.

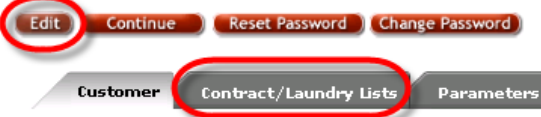


Managing Customers and Customer Settings.

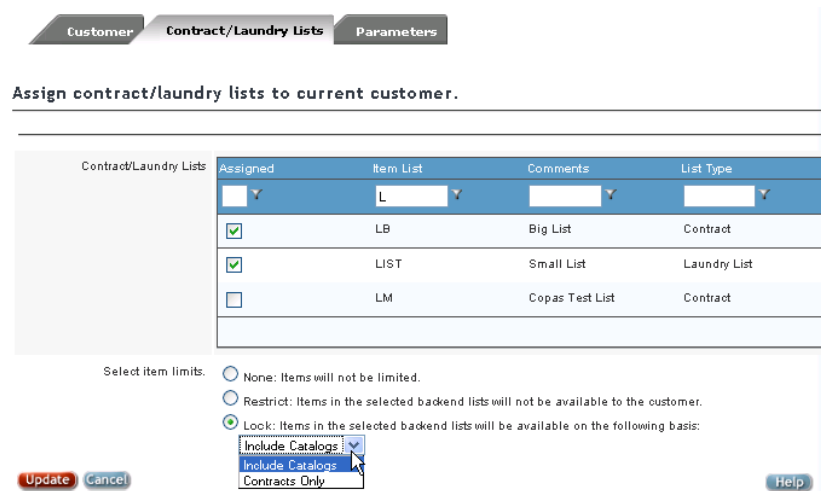
You can add or edit customer record and set customer settings on individual tabs.

Managing Customers: Edit

To edit your Guest user settings, press Edit, change the necessary fields and then press the update button.



- If you have a long list, you can use the filterable column headings. For example, in the list below, we've filtered it to all records where the Item List contains "L".



Assign contract/laundry lists to current customer.

Contract/Laundry Lists	Assigned	Item List	Comments	List Type
	<input type="checkbox"/>	L		
	<input checked="" type="checkbox"/>	LB	Big List	Contract
	<input checked="" type="checkbox"/>	LIST	Small List	Laundry List
	<input type="checkbox"/>	LM	Copas Test List	Contract

Select item limits. None: Items will not be limited.
 Restrict: Items in the selected backend lists will not be available to the customer.
 Lock: Items in the selected backend lists will be available on the following basis:
 Include Catalogs:

Update Cancel Help

- Place a check in the box(es) beside the backend lists you wish to apply or exclude.
- Select limits, by selecting the appropriate options to apply to all selected backend lists:
 - None:** By default, the customer is *not* limited to viewing items in backend lists. If you selected contracts / laundry lists on this page, the customer will be able to see those items and any contract pricing that has been synchronized from your backend system.
 - Restrict:** The customer will be unable to view or purchase items belonging to the selected contract(s)/laundry list(s). (Restricted items will not show up on your site where that user is logged in.) This works in the same way as, on your backend system, when you assign a customer to a restrictive contract. *The backend contract does not have to be a "restrictive" contract.*

Note: The DDMS backend system has a similar feature. If the customer is assigned to a "Restrictive" contract, those items are not available for purchase by that customer. While DDMS identifies "Restrictive" contracts with a flag, this flag is *not sent* in the data packet that synchronizes DDMS contracts with ECinteractive. Thus, the "Restrictive" setting in DDMS will not reflect as such for the same contract in ECinteractive after synchronization. Please be mindful of this when synchronizing contracts. *Do not expect "restrictive" contracts in DDMS to automatically be set to "Restrict" in the ECinteractive system. Instead, consider using the "Restrict" setting on the Contracts/Laundry Lists page.*

- Lock to Include Catalogs.** All items that are in *both* the customer's Catalog Groups *and* the assigned backend Contracts/Laundry Lists are shown to the customer. Note: if none of the items in the assigned backend lists exist in the customer's catalog groups, then no items will appear to the user in the front-end.
- Lock to Contracts Only.** All items that are in the selected backend lists will *override* the customer's Catalog Group settings. In effect, the selected backend lists become the customer's Catalog Groups. Note: If you make changes to catalogs in these

customers' Catalog Groups, it will have no effect on the Contracts-Only customers. Items *not* in the customer's assigned backend list *will not be shown* to the user.

9. When you are ready, click **Update**.

Exceptions

There are a few *exceptions* where items may not be excluded or displayed as expected:

- The **Cart** may contain items that are outside of the customer's assigned backend lists if the customer added them prior to the backend lists being restricted. The user will not be able to proceed to the Checkout page until they remove the offending items.
- The **QuickOrder** page automatically matches partial SKUs, whether or not they are within assigned backend lists, before checking against the database.
- If an item is set up to **automatically substitute** to a second item, and that second item is not included on the assigned backend list, the alternate item will not be shown to the user. An exception will be logged so that the dealer can add the alternate item on the backend list as needed.
- The DDMS backend system allows dealers to set up **Laundry List categories**. These backend list categories are automatically synchronized with ECinteractive. You can use these backend categories in lieu of the categories specified in the wholesaler catalogs. Note: backend categories are limited to the Laundry List page of your shopping site. Category Browse or Advanced Search, for example, will not display your backend Laundry List categories, but will instead display the regular wholesaler catalog categories.
- **Backend-only items** — that is, any item included in a backend list that does not exist in any wholesaler catalog (even catalogs that are outside those specified for the current site) may not appear as expected. Because of the nature of the Catalog Combination Indexing (CCI) and of certain features of ECinteractive, such as Advanced Search, Category Browse, etc., some items contained within the customer's selected backend lists may not appear, even if it matches the search or category limits. Where an item only exists in the backend, and does not exist in your Web content, the ECinteractive Search and Catalog browse queries automatically overlooks it. In order for backend only items to be available to Web queries and Catalog browse, their product detail information must be stored in the database. Backend-only items are added to a Custom Item table in the Web content database, and are assigned to a default site-specific custom catalog called "System Items." This catalog contains two categories that display in product search results and category browsing. For detailed instructions, see "*Setting Up Custom Items & Catalogs*" on the ECinteractive support site.
- During a **quarterly backend item database update** (such as DDMS' O/PUS load), the items in some contracts may change. Typically, there is a time difference of a few days between the time that a dealer loads the backend item database update and when ECi loads the quarterly e-content product details and images. ECinteractive is scheduled to automatically synchronize the contracts and laundry lists after hours, and adjust the list of backend-only items that are stored in the Custom Item table immediately after the quarterly load. Then, during the quarterly e-content load of images and product detail, an additional process will synchronize again. A backend-only item, which has been previously synchronized to e-content and has a corresponding record in the Custom Item table, may suddenly have e-content available. When the e-content is available, the system automatically deletes the item from the Custom Item table and thus the System Items catalog, so that the site can begin using the newly available product details and images.