

User Type Templates and Register Me Features

In tandem with the Guest User Checkout features, ECinteractive and is.D-Force 2 version 9.0.0 gives you control over how new customers open accounts with your business. You can create user type templates that apply to new users, and set up self-registration options.

Setting Up User Type Templates For New Users

The new **User Types** page in the Admin Control Panel's **Customer Admin** menu allows the dealer to create templates to apply to new users.

You can create as many User Types as necessary. For example:

- You can simply create **one default** user type for all new customers, and adjust it later as needed to offer a special discount (created in your backend system) for any new customers that self-register during a campaign.
- Or, you can set up several nearly identical user types, each assigned to a separate tax district, and name them according to the tax district.
- You can have one user type restricted to the AbilityOne/JWOD contract for your federal agency customers.

To set up user types, follow these steps:

1. Click **Customer Admin** and select **User Types**. The User Types page opens.
2. Click the **Add a New User Type** link to create a new user type.
 - **Description.** This box displays the description for the selected user type. You can specify a description of up to 50 alphanumeric characters when adding and changing user types. The description you enter here displays on the front-end Web site when a user creates a new account. You can specify whether to allow shoppers to choose a user type in the User Type Selection During Registration box in Site Preferences.

User Type Details	
Description:	<input type="text"/>
Location:	<input type="text" value="Default - GL Inv Printer"/>
GL:	<input type="text"/>
Inv:	<input type="text"/>
Printer:	<input type="text"/>
Route:	<input type="text"/>
Remarks:	<input type="text"/>
Drop Ship Flag:	<input type="text"/>
Salesman ID:	<input type="text"/>
Taxable:	<input type="text"/>
Taxable District:	<input type="text"/>
Discount Type:	<input type="text"/>
Discount Percentage:	<input type="text"/>
Contract ID 1:	<input type="text"/>
Contract ID 2:	<input type="text"/>
Contract ID 3:	<input type="text"/>
Contract ID 4:	<input type="text"/>
Contract/Laundry Lists:	<input type="checkbox"/> 123456789 <input type="checkbox"/> k8

- **Location.** This box displays the default location for the selected user type. When adding and changing user types, click the down arrow to choose the default location

from the list. This list includes all account locations defined in the Account Locations Management page.

- **GL.** You can use the GL box to assign a specific general ledger location to this user type. Click this box and enter the location from your back office business system, 01, for example. You can specify up to two alphanumeric characters in this box.
- **Inv.** You can use the Inv box to assign a specific inventory location to this user type. Click this box and enter the location from your back office business system, 01, for example. You can specify up to two alphanumeric characters in this box.
- **Printer.** You can use the Printer box to assign a specific printer to this user type. Click this box and assign the logical name of a printer from your back end business system, P1, for example. You can specify up to two alphanumeric characters in this box.
- **Route.** This box displays the route for the selected user type. When adding and changing user types, click this box and enter the route from the back office business system to use.
- **Remarks.** This box displays remarks for the selected user type, if any. When adding and changing user types, click this box and enter any remarks associated with this user type. This box defaults to the Created Automatically By Online Ordering System text.
- **Drop Ship Flag.** This box displays the drop ship setting for the selected user type. When adding and changing user types, click this box and enter the drop ship setting from the back office business system to use.
- **Salesman ID.** This box displays the salesperson account number for the selected user type. When adding and changing user types, click this box and enter the salesperson number from the (A) Customer screen (Customer Window) from the back office business system.
- **Taxable.** This box displays the taxable setting for the selected user type. When adding and changing user types, click this box and enter the taxable setting from the back office business system to use.
- **Taxable District.** This box displays the taxable district for the selected user type. When adding and changing user types, click this box and enter the tax district from the back office business system to use.
- **Discount Type.** This box displays the discount type for the selected user type. When adding and changing user types, click this box and enter the discount type from the back office business system to use.
- **Discount Percentage.** This box displays the discount percentage to apply to this user type's orders. When adding and changing user types, click this box and enter the discount percentage to use.
- **Contract ID 1-4.** These boxes display the contracts for the selected user type. When adding and changing user types, click these boxes and enter the contracts to use.
- **Contract Laundry Lists.** You can click the corresponding contract and/or laundry lists to select them for the user type. Click each contract and/or laundry list this user type can view and order. The contracts and laundry lists available appear in alphabetical order to help you view and manage your lists. If the list is long, a scroll



bar appears to the right of the page so you can quickly move up and down to view contracts and laundry lists currently set up.

- **Select Item Limits.** These options let you select the item limits for this user type:
 - Select the **None** option to allow the user type to view all catalogs and contract and/or laundry list items assigned to the account. This option means that the user type is not limited to viewing items from your back office lists. If you selected contracts/laundry lists, the user type can see those items and any contract pricing that has been synchronized from your back office system.
 - Select the **Restrict** option to restrict this user type to not view specific items. For example, you can set up a restricted contract and/or laundry list of items the selected user type cannot view. Once you check that laundry list, you then click the Restrict option so the user type cannot see or order these items when shopping. This is a handy feature if you need to restrict certain items such as furniture products from displaying on specific pages.
 - Select the **Lock** option to specify the items this user type can view. When you click the down arrow in the corresponding box, you have two additional options. You can allow the user type to view and order all contract and/or laundry list items as well as items from his assigned catalogs, or you can limit to only those items that exist in the contracts and/or laundry lists assigned. If you select Contracts Only, items from the chosen contracts and laundry lists override the user type's catalog group settings. The user type is limited to only those contract and laundry list items you assign. This is a useful feature if you need to restrict to specific contracts and/or laundry list items only.

- **Lock Customer to Selected Catalogs.** This box lets you specify that this user type can view only catalogs you selected in the Global and Custom boxes. To enable this feature, check the Lock Customer to Selected Catalogs box. The user type is restricted to only those catalogs you specified.

- **HP Purchase Edge.** Indicate whether to make the Hewlett Packard Purchase Edge feature available to this user type on the end user's Home page. PurchasEdge is an easy-to-use program that rewards your end users for purchasing original HP (Hewlett Packard) supplies. As a PurchasEdge member, your end users earn points for each qualified purchase made. Once enrolled, users receive access to the PurchasEdge Web site where points can be

redeemed online for free HP products, including printers, digital cameras, and PDAs. Your end users can enjoy exclusive HP promotions as well as a personalized Web site, quarterly statements and many special offers. For more information concerning this feature, see www.hp.com/sbso/special/purchasedge/ and the sign-up form on the ECi Solutions site, *Register as an HP PurchasEdge Reseller*. Be sure you are set up to use the ECi Private Supply Network (PSN) services.

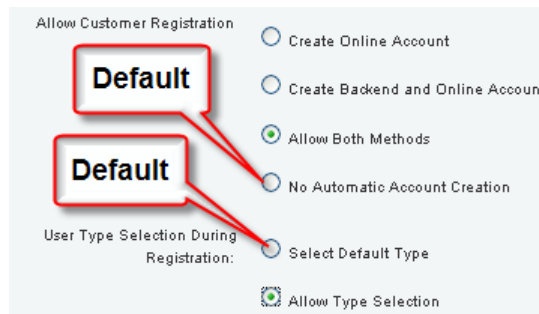
- **Global Catalog Group.** This box displays the global catalog group for the selected user type. When adding and changing user types, click the down arrow in this box to assign the catalog to this user type.
 - **Custom Catalog Group.** This box displays the custom catalog group for the selected user type. When adding and changing user types, click the down arrow in this box to assign the catalog to this user type.
 - **Alt/Sub Setting.** Click the down arrow in the Alt/Sub box to assign alternate and substitute settings to this user type. (You set default alternate and substitute settings in Customer Settings.)
 - **Checkout Setting.** Click the down arrow in the Checkout box to assign checkout settings to this user type. (You set default checkout settings in Customer Settings.)
 - **Communication Setting.** Click the down arrow in the Communication box to assign communication settings to this user type. (You set default communication settings in Customer Settings.)
 - **Feature Setting.** Click the down arrow in the Feature box to assign feature settings to this user type. (You set default feature settings in Customer Settings.)
 - **Marketing Setting.** Click the down arrow in the Marketing box to assign marketing settings to this user type. (You set default marketing settings in Customer Settings.)
 - **Price Setting.** Click the down arrow in the Price box to assign price settings to this user type. (You set default price settings in Customer Settings.)
3. When finished, click **Save**.
 4. Click  to edit an existing User Type. Enter the new information over the existing information and click **Update**.
 5. Click  to delete an existing User Type. At the Are You Sure prompt, click **OK**.

In addition, you can allow the user to select a user type when they self-register, or simply use a default user type. See Setting Site Preferences for Self-Registration, in the following section.

Setting Site Preferences for Self-Registration

From the Admin Control panel's **Global Settings** menu, you can **Edit** your **Site Preferences** page to **Allow Customer Registration** as follows:

- Let users create an online account (it prompts for an existing account number to add a new user).
- Let users open both a backend and online user account (assuming the new user does not belong to a company with an existing account, this prompts for the information necessary to create a backend account, and an email will notify the dealer that new accounts have been added).
- Allow both methods (it prompts the user which method they wish to use) — *Recommended!*
- (Default) No automatic account creation (it directs the user to fill out the form, which generates an email containing all the information entered to both the prospect and the dealer, who is then responsible for adding this user to both the front-end and backend system).



In addition, you can allow all users to select a user type when they self-register, or simply use a default user type.

Customizing Site Text for New User Registration

You can also customize certain headers and text fields associated with New User Registration in the **Site Text** admin pages.

Below is the default text that appears on the End User's RegisterMe page if you allow Customer Registration:

Create Backend and Online Account: *“Create a completely new account.”*


Create Online Account: *“I know my account number and wish to create an online account.”*

No Automatic Account Creation: *“I want to request that an account be set up by email.”*

Text field	Text Description
Create Backend and Online Account	(Default Text)
Create Online Account	(Default Text)
No Automatic Account Creation	(Default Text)

Assigned Text:
I know my account number and wish to create an online account.

To make changes to any of these links:

1. First, use the **Text Editor** to create a new page (For best results, you may wish to limit these Self-Registration pages to a short description or list, and give the page a **Text Description** that you can easily distinguish from others).
2. Then, use the **Site Text Assignment** page to  **Edit** the text field, replacing the default text with the new page you've created.

For detailed instructions, see your online help, or see the illustrated document on our Web site: *Customizing Site Text and Messages in ECinteractive.*

New User Experience

This walk-through assumes that the dealer has opted to allow new users to allow both methods of Self-Registration.

When a user who has not logged in attempts to visit the secure **Checkout** page on your site, the **Login** page prompts them as usual to enter their credentials before proceeding. This page also gives them the options to create an account that you have specified.

Your guests can choose the third option, which is by default, "I do not wish to create an account today. Please take me to Guest Checkout." They will be prompted for email address, shipping address, CAPTCHA response, and other checkout features assigned to your Guest Users. They will also be able to view just their order's history by entering their email address, ship-to zip code, and order number. For details, see the illustrated document on our Web site, *Guest User Checkout and Order History.*

If the New User clicks one of the links to create an account, the account registration page prompts them for user name, password, email, security question, and (if multiple are available) User Type.

If the user selected to create a completely new account, they will be prompted for information similar to the information verified in the pages illustrated below, for existing accounts.

If the New User clicked the link to create an online account for their account number, they will be prompted to verify their account number. If it doesn't match a customer record on the backend system, the page indicates prompts the user to verify entries and try again. If the account does exist, then the shipping and billing address of the account is displayed to the user to allow the user to verify that they have the correct account. If not, the user can

enter another account number. Otherwise, they will continue.

The next form prompts the user to enter information that is necessary to create a new account. The first set of fields allows the user to specify the name of the account (Company Name), the billing address, and the phone number. The second set of fields allow the user to specify the shipping address (if different than the billing address), along with an association code and a location.

The Association Code field is used to populate the “2nd Salesman” field in the DDMS backend, and as is limited to 4 characters.

If the Location drop-down box appears, the user may select from values specified in the Admin Control Panel’s Location Management settings, under the Site Info menu. If only one Location is defined in the Admin, then that Location will be used by default and the drop-down will not display.

Upon verifying an existing account or creating a new account, the Optional Account Information page prompts for details such as number of employees and a referral account number.

This completes self-registration.