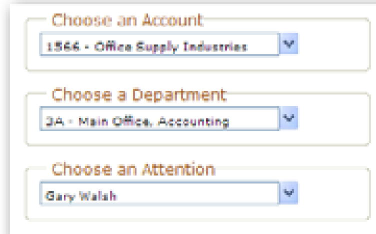
Tech Note

Letting A User Shop For Others in ECinteractive™

Can Some Users Shop For Multiple Accounts, Departments, or Attentions?

Yes! If you've set up a user account to have rights to multiple accounts, departments, or attentions, they can select the desired scope not only at checkout, but at any time after login.

They will be prompted after login to specify the scope or accept the default. They can also use the menu along the top of each page at any time during the shopping experience. They simply click **My Account** and select **Choose Account.**



Based on the new scope, the system automatically reprices items as needed, whether they are already in the ShoppingCart or added to it. Pricing may vary depending on how the Customer account, department, and attention is set up in the back-end system. The selected account, department, and attention affects the display of many pages on your shopping site, including Order History, Customer Budgets, Online A/R, and so on.

On the Checkout page, the user can submit the order under the selected account, department and/or attention. Or, they can select a different scope. All the items' pricing are updated to reflect the particular selected scope.

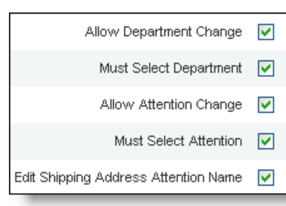
Setting Up User Departments and Attentions in Back-End Customer Record

To use this feature, the user's Customer account database record must be set up with departments and/or attentions in the back-end system. For details, see your system help.

Setting Up Scope Selection in ECinteractive Admin Checkout Settings

You'll need to set up the Checkout Settings, and apply them to appropriate Customer Groups.

1. Log in to your Admin Control Panel.
2. On the left navigation menu, click **Customer Settings** and select **Checkout**.
   Or, using the top navigation menu, click **Consumer Config** and select **Checkout**.
3. Select an existing setting name from the drop-down field, or enter a new setting name.
4. Enable the following checkboxes as desired:

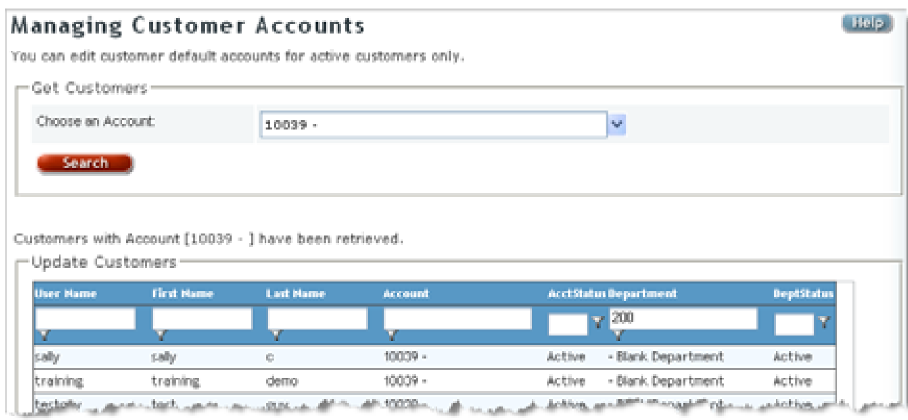


   - **Allow Department Change**. Check this box to allow users to place orders for different departments.
   - **Must Select Department.** To force the user to select a department (other than the default) before placing an order, check this box.
   - **Allow Attention Change**. Check this box to allow users to place orders for different ship-to Attentions.
   - **Must Select Attention.** To force the user to select an Attention (other than the default) before placing an order, check this box.
5. Apply this Checkout Setting as needed to the desired customer group. If you wish to limit the users who are able to shop for others, set up a new customer group. For detailed instructions, see your Admin Control Panel online help.

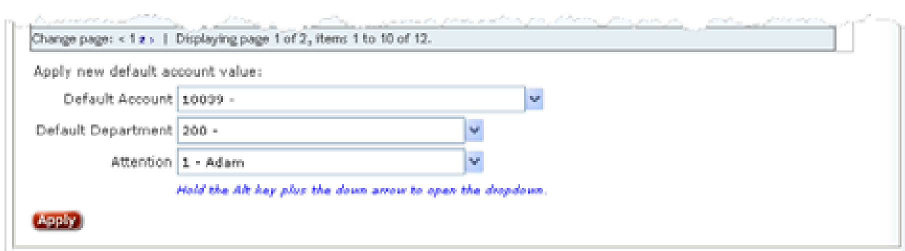
Setting Up Default Account, Department, and Attention En Masse

You can specify the default account, department, and attention for all users who belong to an account, department, or name using the Customer Account Management page:

6. On the left menu, click **Customer Admin** and select **Customer Account Management**. Or, using the top menu, click **Consumer Admin** and select **Account Management**.
7. Select an **Account** from the drop-down field, and click **Search**. This will retrieve all customers who belong to that account.
8. Use the filter fields below the grid headings to set limits.
   - To limit to a particular Department, enter one of the department values, as shown. To limit to a particular User, enter the Username.
   - Click the Filter button for that column. A popup menu appears.
   - Select an operator, such as **Contains, Equal To, Less Than** or **Greater Than**. The grid will refresh to display matching rows.



9. In the **Default Account** field under the grid, click the down arrow and select the account. This will populate the Default Department drop-down selections.
10. (Optional) In the **Default Department** field, click the down arrow and select a department. This will populate the Attention drop-down selections.
11. (Optional) In the **Attention** field, click the down arrow and select an attention.
12. Click **Apply**.



Setting Up Default Account, Department, and Attention for an Individual

You can specify the default account, department, and attention for a specific user using the Parameters tab of the Customer Management page:

1. On the left menu, click **Customer Admin** and select **Customer Management**.
   Or, at the top, click **Consumer Admin** and select **Customer Maintenance**.
2. (Optional) Limit the search by entering information about the customer, such as name, account, department, location, username, email, and so on.
3. Click **Search**.
4. In the Customer Search Results grid, click the  button to view the customer record.
5. Click the **Edit** button.
6. Click the **Parameters** tab.
7. Scroll if necessary to view the **Default Account Information** section.
8. In the **Default Account** field under the grid, click the down arrow and select the account. This will populate the Default Department drop-down selections.
9. (Optional) In the **Default Department** field, click the down arrow and select a department. This will populate the Attention drop-down selections.
10. (Optional) In the **Attention** field, click the down arrow and select an attention.
11. Click the **Update** button.