

*ECinteractive<sup>®</sup> &  
is.D-Force2<sup>®</sup>*

*Front End Site:*

*Software Version 9.2.0*



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## Introduction

The software version 9.2.0 release of ECinteractive® and is.D-Force2® contains many exciting and powerful enhancements, including the following:

- Print Invoices on the Pay Invoices Page
- Live Support
- Favorites Sharing
- Account Management (Formerly Super Users).

This handout details how to effectively use these new features.

## Print Invoices on the Pay Invoices Page

In previous software versions, you could print invoices on the Order History page. This latest enhancement adds that same functionality when paying invoices. The Print button has been added to allow printing copies of one or more outstanding invoices. The invoices are printed to a PDF file which can then be saved or printed whenever needed.

- 1 At the top of your front end site, click the My Account drop down menu and choose Pay Invoices.
- 2 Select the invoices to view by clicking the Current, Over 30 Days, Over 60 Days, or Over 90 Days tabs.
- 3 To view invoice line item detail, click the plus sign to the left of each invoice.

**Pay Invoices** Help

**Cost Center**

Current Account: HAPPY - HAPPY MASTER ACCT D.NAME FIELD

**Current**
 Over 30 Days
  Over 60 Days
  Over 90 Days

**Outstanding Balance: \$414.00**

All	Order #	Date	#	Dept	Department Name	LongPO	ShortPO	Debits	Credits	Balance	Remarks
<input type="checkbox"/>					Days						
+	<input type="checkbox"/>	174777-0	6/14/2010	8	Blank Department			\$6.26	\$0.00	\$6.26	INVOICE

Current Amount	31-60 Days Past Due	61-90 Days Past Due	Over 90 Days Past Due	Total Amount Due
\$6.26	\$62.59	\$0.00	\$345.15	\$414.00

**Print** Print the selected orders by Credit Card

**Figure 1:**  
Selecting to  
Print Invoices  
on the  
Shopper's Site

Please allow pop-ups for this site in order to print the remittance form.

- 4 To use the new print feature, click the check box corresponding to the orders to select. Click Print, as shown in Figure 1. All the invoices selected are printed to a PDF file.

## Live Support

If your dealer has enabled it, you now have the ability to chat online with company representatives. With a simple click, you can begin an immediate session to ask questions about products or services, and receive assistance when placing and completing orders. You may also be able to provide a name, email address and questions that can be quickly answered by email.

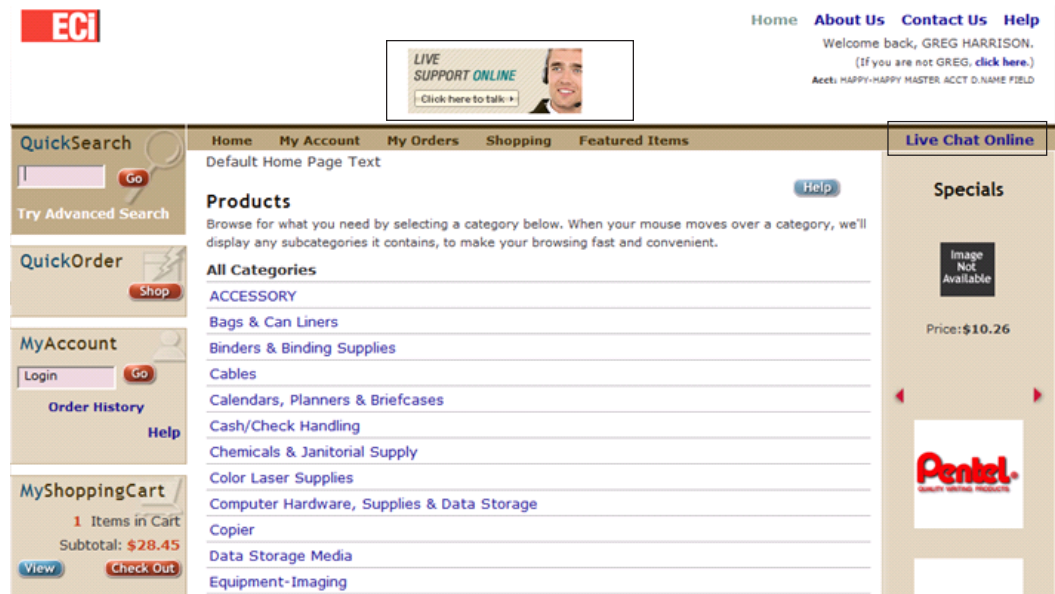
When your Web page opens, an image appears on your Home page. See Figure 2.


## Favorites Sharing

This new feature lets you create favorites lists which can be shared with other users within the same account and department.

- 1 At the top of the front end site, click Shopping, select My Favorites List and click Manage.
- 2 The Manage My Favorites Lists page opens. Shared lists display a check mark in the Shared column. Under My Favorites Lists, click Select beside the list to be shared.
- 3 Details appear for the list selected. Click the Share button. The new Shared Favorites List page opens. See Figure 3.
- 4 The Favorites List box defaults to the list selected. To change it, click the down arrow and choose from the list.

Figure 2: The Live Support Image



- 5 Click the down arrow in the Favorites List box and click the list to assign.
- 6 Click the down arrow in the Account box and click the account to assign this list.
- 7 Assign the list to all departments within an account or choose one or more departments.
  - To assign the list to all departments, click the Share with Account check box.
  - To assign the list to one or more departments, click Share With Department box and enter part or all of the department. You can also click the down arrow in the Share With Department box to select it. Click Add Dept. It is added to a list. Continue adding departments.
  - To assign by viewing a list of departments for the account, click the Select Multiple Departments link. Click the check box beside the department to add. To add all departments shown on a page, click the check box to the right of the Department box. Continue adding departments. When finished, click Save Selection.
- 8 The departments added appear in a list. You can limit using the Department and Name boxes. Click the column heading to sort the list. To delete a department, click .
- 9 To unassign all the departments from the account, click the Unshare With All Departments link.
- 10 When finished, click the Return to Favorites link at the top of the page.

## Share Favorites Lists


[Back](#)

Favorites List:   Share with Account

Account: 050510 - CINCO DE MAYO CUSTOMER

Share with Department:

[Select Multiple Departments](#)  
[Unshare with all Departments](#)

Department	Name
<input type="text"/>	<input type="text"/>
	Blank Department
Count : 1	

**Figure 3: The New Shared Favorites Lists Page**

## Account Management

If your dealer has enabled it, this tool can help streamline your business processes by giving you the ability to edit site news, manage favorites lists, group settings, approval chains, global and custom catalogs, as well as contracts and laundry lists.

- 1 Click the Account Management option under the My Account drop down menu. See Figure 4.

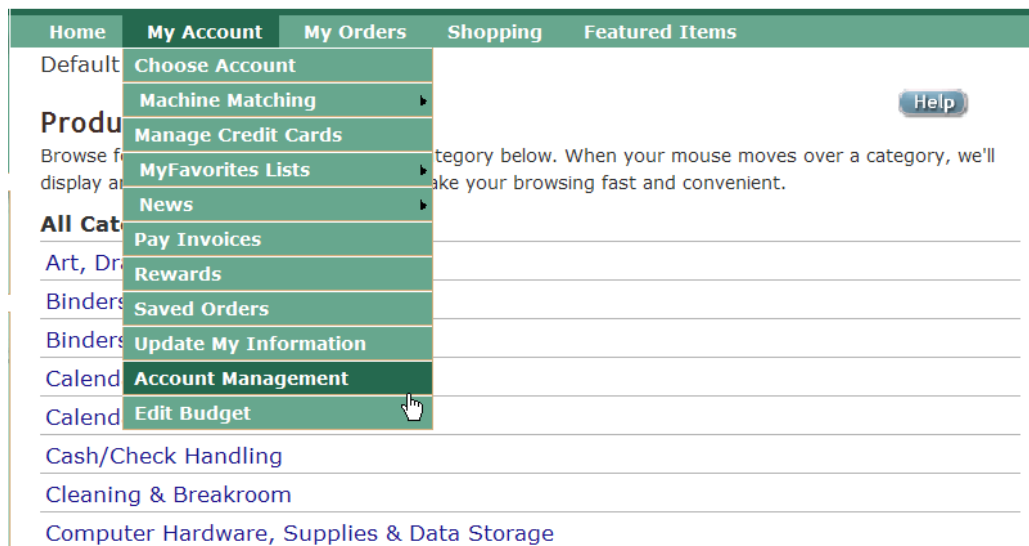
---

**Note:** Occasionally your Account Administrator Dashboard may display news at the top of the page. Your dealer specifies the information to be shown. If news is not specified, the system defaults to not show text.

---

- 2 If prompted, enter the user name and password you use to log into the site.
- 3 The Account Administrator Dashboard opens, displaying your available options. This page can include any of the following, as shown in Figure 5:
  - Customer Management
  - Site News
  - Manage Domain Administrators
  - MyFavorites Lists
  - Approval Management.
- 4 When finished viewing and changing settings, the account administrator closes the window to return to the front end Web site.

**Figure 4:**  
Selecting  
Account  
Management



## Customer Management

This user-friendly page lets you easily manage your shoppers.

*You can also click the Customer Admin menu and choose Dashboard.*

- 1 From the Account Administrator Dashboard, click the Create, Edit, and Delete Customer Records link.
- 2 The Customer Records page opens. See Figure 6. The page is divided into two sections: Search and Customer Records.

**Note:** Use access keys to navigate. To move the cursor to the Category Keyword box, type **Alt + K**. To move to the Add Customer link, type **Alt + A**.

### Search

Searching for shoppers is very intuitive and has been designed to help you quickly retrieve customer records.

- 1 To open a list of all your shoppers without setting limits, click Go or press Enter. Go to **Step 5**.
- 2 To set limits, click the down arrow in the Search Category box. Select the search method. The method is retained for future searches until you change it. For example, if you search using First Name, the next time you begin a search, Search Category defaults to First Name.
- 3 Click the Category Keyword, Account and/or Department boxes. Enter part or all of the search criteria. For example, to search by last name, you could enter Ab to display all customers whose last name begins with Ab.



*The default for the Search Category box is Last Name.*

**Figure 5: The Account Administrator Dashboard**

The screenshot shows the Account Administrator Dashboard with a breadcrumb trail: Home > Customer Admin > Management. The dashboard is divided into several sections:

- Customer Management:** Create, edit and delete customer records.
- MyFavorites Lists:** Create and assign lists to customers.
- Site News:** Create, edit and delete news items for your site.
- Approval Management:** Manage customer & department approval groups.
- Manage Domain Administrators:** Create, edit and delete domain administrators. Below this is a table for "Current Domain Administrators" with one entry: "doc writer".

- 4 Click Go.
- 5 The Customer Search Results page opens, as shown in Figure 7. This page lets you filter customers using the Name, User Name, Active, Locked Out, Last Login, Last Order and Created date. Click the box by which to limit and enter the information. To set a filter, click the down arrow to the right of the box. Select a filter from the drop down box.

This page is sorted by account number. Click  to expand or click  per account to collapse the user list.


In addition, changes made to an account/user are now logged. Click the Log link to view the report. For details, see the heading **Customer Log**.

Click  Add New Customer to add a new shopper to the database. For details, see **Add Customers**.

Click  to view the shopper's information. You can also Edit Customers.

Click  to delete the customer. At the Are You Sure prompt, click OK. The customer is deleted.

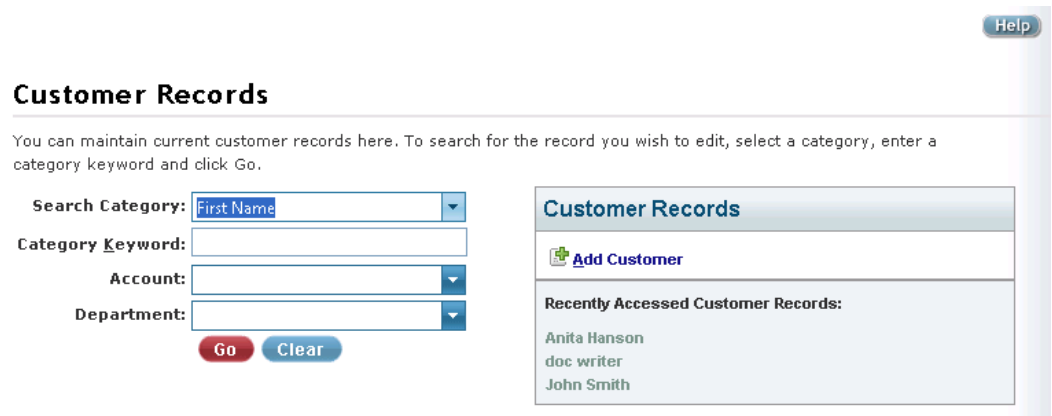
Click  to lock or unlock the selected user.

Click  to reset the user's password. The Reset Customer password message appears. Click OK.

Click the Log link corresponding to the account/user to view logged changes. The Customer Log page opens. For details, see **Customer Log**.

- 6 Click the Dashboard link at the top of the page to return to the Customer Records page.

**Figure 6: The Customer Records Page**



**Customer Records**

You can maintain current customer records here. To search for the record you wish to edit, select a category, enter a category keyword and click Go.


Search Category:

Category Keyword:

Account:

Department:

**Customer Records**

 [Add Customer](#)

**Recently Accessed Customer Records:**

- Anita Hanson
- doc writer
- John Smith



## Customer Records

This section shows the number of customers added and the number currently online. From here, you can add a new customer or edit the guest customer account. Under the Recently Accessed Customer Records heading, the last five customers display. Click a customer's name to view or edit. For details, see the headings **Add Customers**, **Copy Customers**, and **Customer View**.

## Customer View

The Customer View page automatically opens after you finish adding a new shopper. It also opens when you retrieve a shopper on the Customer Search Results page or when you click a shopper's name on the Customer Records page. Like Customer Records, this page provides a user-friendly way to manage your shopper's information and settings. You can quickly add, edit, delete, as well as, copy shoppers with ease. You can also adjust a shopper's group settings or view approval group settings and membership information without leaving Customer View. See Figure 8.

**Note:** As you navigate, links (breadcrumbs) appear at the top of the page. Click to return to the previously accessed page or to the Dashboard.



















- To change a shopper's status, click Active or Inactive.
- To view the Customer Log, click  View Log. See the heading **Customer Log**.
- To add a new shopper, click  Add Customer. See **Add Customers**.

**Figure 7: The Customer Search Results Page**

Dashboard » Customer List Help

### Customer Search Results

Search Criteria: All customers

+ Add New Customer										
			Name	User Name	Active	Locked Out	Last Login	Last Order	Created	
			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Default Account Code: 05 051 0										
			doc writer	docwriter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/16/2010		3/24/2009	Log
			sdfg sdf	11369	<input type="checkbox"/>	<input type="checkbox"/>	5/6/2010		5/6/2010	Log
			ryan smith	ryansmith	<input type="checkbox"/>	<input type="checkbox"/>	5/25/2010		5/25/2010	Log
			John Smith	johnsmith	<input type="checkbox"/>	<input type="checkbox"/>	7/7/2010		7/7/2010	Log
			Anita Hanson	ahanson	<input type="checkbox"/>	<input type="checkbox"/>	7/8/2010		7/8/2010	Log
			Ray Jones	rjones	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/14/2010		7/14/2010	Log

For more details concerning adding and maintaining customer settings, see your online documentation.

- To add a new shopper using this customer’s settings as the default for the new record, click . See **Copy Customers**.
- To edit the shopper’s information, click beside the Customer Information heading. When finished, click Save.
- To view the shopper’s customer group settings, click . To edit, click beside the setting to change. When finished, click Save.
- Under the Account Information heading, to change the default account, department or attention for this user, click beside the

**Figure 8: The New Customer View Page**

**Customer View: docwriter**

Status:  Active  Inactive [View Log](#) [Add Customer](#) [Copy doc writer](#)

Customer Information	
First Name	doc
Last Name	writer
Phone Number	819-555-1234
Phone Extension	
User Name	docwriter
Email	writer@ddms.com
Email Format	HTML
HP Purchase Edge	Yes
Confirmation Email	No
Opted Out of Flyers	No

Account Information	
<b>Default Account   Department   Attention</b>	
050510 - CINCO DE MAYO CUSTOMER	
- Blank Department	
Not Set	
Customer is authorized for ALL departments on website	

CCI	
<b>Action / SPR / United + Diane's Catalog Group</b>	
Status	Active

Location	
GL	
Inv	
Printer	1



Catalog Groups	
Global	Action / SPR / United
Custom	Diane's Catalog Group
Lock to Selected Catalogs	No



Contract/Laundry Lists	
78LL - 78LL LAUNDRY LIST	<a href="#">View All</a>
94 SPAR FLYER - 94 SPAR FLYER	
DH - DH LL	
DW - DW CONTRACT	
J1 - J1 CONTRACT	
<b>Selected Product/Item Limits</b>	
None: No product/list restrictions.	

Approval Group Membership	
050510 - CINCO DE MAYO CUSTOMER - Top Level Group	

User Group Settings	
Alt/Sub: Automatic	
Checkout: (Custom)	
Communication: Default	
Feature: DW FEATURE GROUP	
Marketing: 051109 New Mktg Setting	
Price: Default	


[Authorize Credit Card](#)  
[Change Customer Password](#)  
[Reset Password](#)

setting to change. At the bottom of this section, click  or  to view additional shopper details, including the department settings, checkout and Feature settings. Click Edit to make changes.

- Under the CCI, Location, Catalog Groups, and Contracts/Laundry Lists headings, click  to change the settings. When finished, click Save.
- Under the Approval Group Membership heading, click  to view the settings for the group. See **Approval Management**.
- At the bottom of the page, click buttons to Authorize Credit Cards, Change and Reset Customer Passwords.

For more details on adding customers, see your online documentation.

## Add Customers

- 1 On the Customer Records, Customer Search Results, or Customer View pages, click  Add Customer. The New Customers page opens. See Figure 9.
- 2 Check the Add Another Customer When Finished box to add a different customer when the first customer has been added.
- 3 Complete the Info through Price pages. Click Next and Previous to move from page to page. *To add the customer, you must complete the Info, Acct, and Dept pages.*

**Figure 9:**  
Adding a New Customer

Dashboard » Customer List » Customer View » Add/Edit [Help](#)

### New Customer

Add another customer when finished.

Info Acct Dept Attention Location Catalog Contract Alt/Sub Checkout Comm Feature Marketing Price

Enter customer information. (\*Required Fields)

\* First Name:

\* Last Name:

Phone:

Phone Extension:

\* UserName:

\* Password:

\* Confirm Password:

Email:

Email Format:

Email confirmation to customer when account has been created:

HP Purchase Edge:

[Cancel](#) [Next](#)

---


**Note:** On the Dept page, you can click Finish. If you do, this customer defaults to use the guest user settings for catalogs, item substitutes, checkout, communications, feature, marketing, and price. If you click Next, you can set optional account-specific settings, including an attention, location, contract and/or laundry lists, and additional user settings.

---

- 4 After adding the customer, click Finish.


## Copy Customers

The Copy feature lets you add new shoppers using another customer's settings as the default for the new record. Adding a shopper by copying can be accomplished with a bare minimum of keystrokes. This new Copy feature can greatly speed up the process when adding multiple shoppers at once.

- 1 On the Customer Search Results page, retrieve the customer to copy. If shown in the list, you can also click the customer to copy on the Customer Records page.
- 2 The customer selected opens on the Customer View page. Click .
- 3 Click the First Name through Send Confirmation Email boxes and enter information for this new customer.
- 4 When finished, click Save.

## Customer Log

If an account administrator changes a shopper's account, each change is logged for troubleshooting purposes. You can view the action performed, the setting changed and the date, as well as the individual who made the change.

- 1 Click  View Log on the Customer View page. Or you can click the Log link on the Customer Search Results page. The Customer Log page opens, as shown in Figure 10.
- 2 You can limit using the Logged Action through By boxes. Click the column heading to sort the list.
- 3 When finished viewing, click the Customer View or Dashboard link at the top of the page.

## Site News

If your dealer has enabled this feature, use this page to assign information you have created so it displays on the shopper's site. For example, you can create a custom page and assign it to unassigned shoppers, each shopper within the domain, or specific shoppers by selecting accounts and/or departments. This is a helpful tool to advertise specific information to selected users.

*You can also click the Management menu and choose News Management.*

- 1 From the Account Administrator Dashboard page, under Site News, click Create, Edit, and Delete News Items For Your Site. You can also click the Management menu and click News Management.
- 2 The News page opens, displaying any news items you have currently set up. You can use the Description to Last Modified Date boxes to limit the information. Click the column headings to sort the data.

Click  beside the news item to change. The Details, Content Preview, and Target sections open. Click  beside the section to change. When finished, click Save.

Click  beside the news item to delete. At the Are You Sure prompt, click OK.

Click  Add News Item to add a new text page.

- 2.1 Click the Description box and enter a description for this page, About Us, for example. See Figure 11.
- 2.2 Click the body of the Text Editor box and specify the text for the page you are creating. The text you enter displays on the end user's site. If you are creating an HTML page, use the icons in the menu bars to format the text. For example, you can use various buttons to paste content copied from Microsoft Word® and use


**Figure 10:  
Viewing the  
Customer Log**

Dashboard » Customer List » Customer View » Customer Log Help

### Customer Log

Logged Action	Logged Object	Comments	Modified	By
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
▼ Customer: doc writer; UserName: docwriter (Showing 15 of 36 items. Group continues on the next page.)				
Create	OrderApproval	Added to Approval Group 'Top Level Group'.	7/12/2010 11:29:50 AM	docdealer
Update	Setting	Customer feature setting is changed.	7/9/2010 12:27:06 PM	docdealer
Update	Customer	Added to domain ABC Company.	7/8/2010 12:38:21 PM	docdealer
Update	CCI	Catalog group is changed to CCG: Diane's Catalog Group.	7/8/2010 11:59:35 AM	docdealer
Update	Attention	Default attention is changed as: Not Set.	7/8/2010 11:55:57 AM	docdealer
Update	Department	Default department is changed as: - Blank Department.	7/8/2010 11:55:57 AM	docdealer
Update	Account	Default account is changed as: 050510 - CINCO DE MAYO CUSTOMER.	7/8/2010 11:55:57 AM	docdealer
Update	Customer	Deleted from domain ABC Company.	7/8/2010 11:18:10 AM	docdealer
Delete	Department	Department 100 - SALES was removed.	7/8/2010 11:05:19 AM	docdealer
Delete	Department	Department 200 - ACCOUNTING was removed.	7/8/2010 11:05:16 AM	docdealer
Delete	Department	Department 300 - WAREHOUSE was removed.	7/8/2010 11:05:14 AM	docdealer
Delete	Department	Department 400 - CUSTOMER SERVICE was removed.	7/8/2010 11:05:06 AM	docdealer
Delete	Department	Department 500 - REPAIRS was removed.	7/8/2010 11:05:03 AM	docdealer
Update	Setting	Customer checkout setting is changed.	7/8/2010 10:23:31 AM	docdealer
Update	Attention	Default attention is changed as RAUL REYES.	7/8/2010 10:05:22 AM	docwriter

36 items in 3 pages

boldface, italics, bullets, numbered lists, font size, email links, date and time stamps, images, and so on. To view Help, click  or press F1.

2.3 Click Next.

2.4 Set the shoppers who can view this news. You can choose to display the news to currently unassigned users, every user within the domain or to display to users in the accounts and departments you select. If you click the Display to Users in Selected Accounts or Departments option, select the departments and account which can view this news item. When finished, click Save.

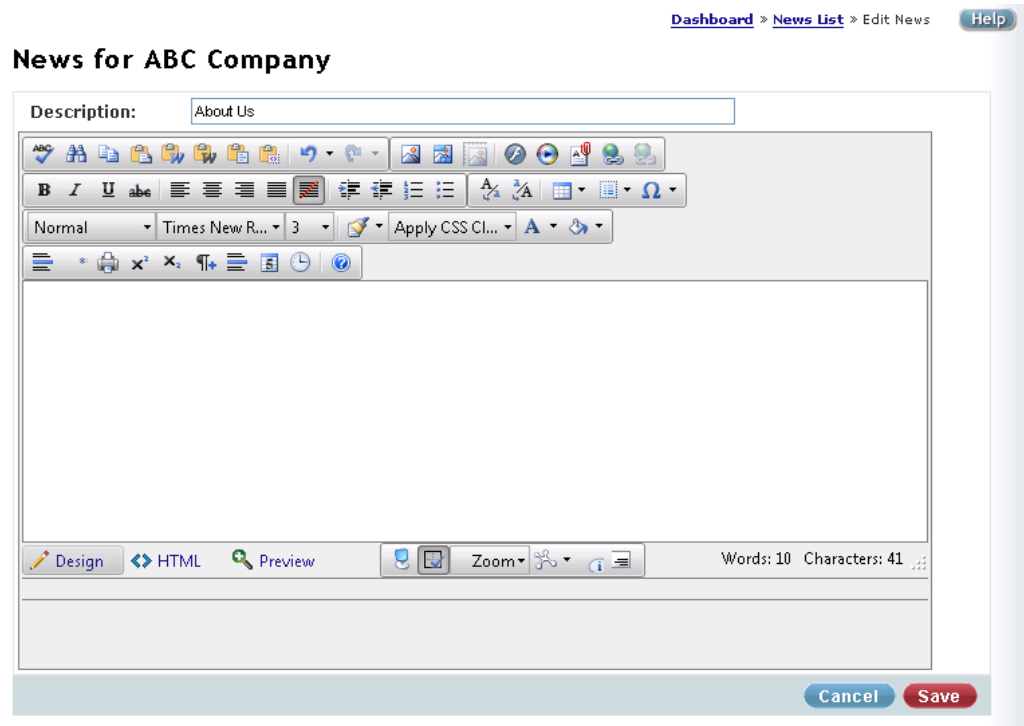
## Manage Domain Administrators

If your dealer has enabled this feature, this flexible tool can help streamline your business by allowing you the ability to add, change and delete customers assigned to a domain.

- 1 From the Account Administrator Dashboard page, under Manage Domain Administrators, click Create, Edit, and Delete Domain Administrators.



*You can also click the Management menu and click Admin Management.*

**Figure 11:**  
Creating Site  
News



- 2 The Edit Domain page opens. Choose the customers to assign this domain. You can use a drop down box or select using a list of customers.

To use the drop down box, click the down arrow in the Customer Name box and choose the customer to assign this domain. Click Add. The name is added to the grid at the bottom of the page. When finished adding, click Save.

To select from a list, click  Use Grid to Select Options. Click  beside the customer to add it to the list. Continue to add as many as necessary. When finished adding, click Save. See Figure 12.

**Note:** Click  to delete a customer from the list. To add the customer to the domain, click .

## MyFavorites Lists





If your dealer has enabled this feature, you can create a favorites list to give shoppers easy access to products they purchase frequently. Any favorites list you add must have at least 25 items to display categories. The shopper can also see enhanced content products in categories if their account has enhanced content enabled, if there are more than 25 items on the list, and if the user selected to Show Products By Category.

**Figure 12:**  
Selecting a  
Customer

Dashboard » Create/Edit Domain Help

**Edit Domain - ABC Company:**

Add customers to this domain.

Add	FirstName	Customer Name:	Email	Username
	Mary	Branson	customer@doesnothaveemail.com	mbranson
	Anita	Hanson	customer@doesnothaveemail.com	ahanson
	Ray	Jones	customer@doesnothaveemail.com	rjones
	sdfg	sdf	11369@email.com	11369
	John	Smith	customer@doesnothaveemail.com	johnsmith

6 items in 2 pages

Use DropDown Menu to Select Options

Customer Name	User Name
<input type="text"/>	<input type="text"/>
 doc writer	docwriter

Cancel Save

---


*You can also click the Management menu and click Favorites Admin Management.*

---


- 1 From the Account Administrator Dashboard page, under MyFavorites Lists, click Create and Assign Lists to Customers.
- 2 The Manage My Favorites Lists page opens.

Click the Assign My Favorites Lists to Customers link at the top of the page to assign a favorites list to all shoppers, or to a specific shopper. For details, see **Favorites Assignment**.


Click  to add new items or mass add items to a list using a delimited file. For details, see **Edit Items on My Favorites Lists** and **Import Favorite List Items**.

Click  to edit the comments or description of an existing favorites list, or to change the type of favorites list. When finished, click .



Click  to delete an existing favorites list. At the Delete This Favorite List prompt, click OK.


Click  to copy an existing favorites list. You can add the items from the list to an existing list or you can create a new list. To add the items to an existing list, click the Add check box next to the list. To create a new list, click the Add check box next to the blank List Name box at the bottom of the window.

Click  Add New MyFavorites List. To add the list:

- 2.1 In the Description box, enter a name for this favorites list. The favorite list description you specify displays to shoppers when viewing available favorites lists.
- 2.2 Click the Comments box and enter a description for the list. Comments display to the shopper when managing favorites lists.
- 2.3 Click . The new favorites list is added to the Current Favorites Lists.

## Edit Items on MyFavorites Lists

- 1 From the MyFavorites Lists page, click  beside the list to change.
- 2 The Edit Items on MyFavorites Lists page opens. To limit the items, use the Item Company through Comments boxes. To sort the list, click the column header.
- 3 To add items to a list, click  Add New Item.
- 4 In the Item Company box, you can enter the three-digit code for the item company being added, SEL or AVE, for example.
- 5 Click the Item Number box and enter the number of the item to add.
- 6 Click the Quantity box and enter the quantity of this item to order.

- 7 Click the Comments box and enter a line item comments for the displayed item. These comments appear with the line item on the shopper's Web page.
- 8 Click . Repeat these steps to add each item to the favorites list.
- 9 When finished adding items, click the Favorites link at the top of the page.




---

**Note:** When you add favorites list you can assign the list to all shoppers, or to a specific shopper. For details on assigning favorites lists, see **Favorites Assignment**.

---

## Import Favorite List Items

This tool lets you import favorite items. Instead of adding items one at a time, you can manually mass add items, or you can import favorites items using a delimited file.

- 1 From the MyFavorites Lists page, click  beside the list to change. You can also click  Add New Favorite List to add a new list for use with this feature.
- 2 Click  Import From File. A new page opens, shown in Figure 13.
  - 2.1 Click the Field Delimiter section and indicated how the favorites items are separated, Comma or Space, for example.
  - 2.2 You can import a list of favorites items from one or more files of the same delimited format or you can manually mass enter the item numbers, one at a time.
    - To use a delimited file, click the My File Has a Header Row check box to exclude column headers from being imported as a separate item record. Then, click the Import Items From File check box. Click Select and scroll to the location on your hard drive where the file is stored. Select it and click Open. To add another file, click Add. Continue to add as many files as needed.
    - To manually enter item numbers, click the Manually Enter Items box. Enter each item, using the selected Field Delimiter between the company prefix and the item number. Press Enter. For example, if you selected Comma as the Field Delimiter, you might enter ABC,123.

**Note:** Along with the prefix and item number, you can also enter the item quantity and comments, ABC,123,5,New Item.

**2.3** Click Next. The item information opens. To sort, click the column headers. To limit, enter the information in the box and choose the filter. Click ✖ to delete an item from the list.

**2.4** An optional step lets you validate items against your back office system. Validating helps ensure that items are available to be purchased on the front end site.

- To proceed without validating, click Next. Go to **Step 2.5**.
- To validate items, click Validate. When complete, click the down arrow in the Backend Valid box and click No to view all invalid items. Click ✖ to delete an item. When finished, click Next.

**2.5** At the Your Items Have Been Successfully Imported message, click Finish.

Select File View Import Results Finish

You may add items to your list by importing a file containing items, entering items by hand or both. Each item should be placed on its own line in four columns where column 1 is the Company/Prefix, column 2 is the Number, column 3 is the Quantity and column 4 is the Comment field. Each column is separated by the delimiter you select in the "Delimiters" box.

For example, a comma-delimited file containing the items ITM1234, ITM5678 and ITM9012 might look like this:

```
ITM,1234,2,Comments for ITM1234
ITM,5678,1,Comments for ITM5678
ITM,9012
```

Note the Quantity and Comment fields are optional and will be filled with default values if left out.

This same format applies to items imported in a file as well as items manually entered into the text box below.

Field Delimiter

Comma  Space  Tab  Pipe

Import Items from File

My file has a header row

Select

Add Delete

Manually Enter Items

You may also enter items manually by entering each item on a separate line using the delimiter selected above to separate the Company, Number, Quantity and Comment portions of the Item number. Note: Quantity and Comment are optional.

Cancel Next

**Figure 13:**  
Importing  
Favorite List  
Items

2.6 The Edit Items on MyFavorites Lists page reopens so you can edit individual items as needed.

If the favorites list you selected is set to be shared site wide, it is immediately available for all accounts and customers. If the favorites list is shared with an account or department, you must assign it before it can be accessed. For details, see the next heading **Favorites Assignment**.

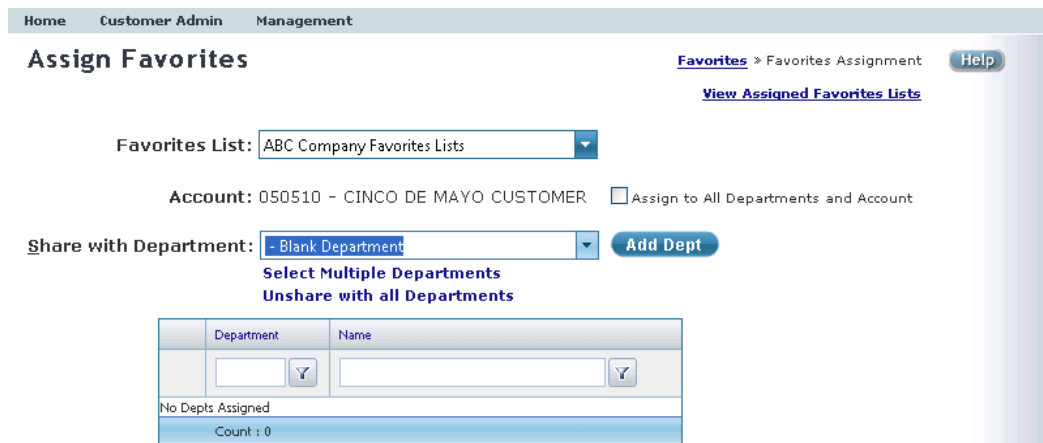
## Favorites Assignment

The Assign Favorites page, shown in Figure 14, lets you easily assign favorites lists to your customer accounts as well as any departments within the account.


- 1 From the MyFavorites Lists page, click the AssignMy Favorites Lists to Customers link
- 2 Click the down arrow in the Favorites List box and click the list to assign.
- 3 Click the down arrow in the Account box and click the account to assign this list.
- 4 Specify how to share the list.
  - To assign the list to all accounts, click the Share With Account check box.
  - To assign the list to one or more departments, click Share With Department box and enter part or all of the department. You can also click the down arrow in the Share With Department box to select it. Click Add Dept. It is added to a list. Continue adding departments.

*If the list selected has assigned departments, they appear in the bottom section of the page.*

*Type Alt + S to move the cursor to the Share With Department box.*



**Figure 14:**  
Assigning Favorites

- To assign by viewing a list of departments for the account, click the Select Multiple Departments link. Click the check box beside the department to add. To add all departments shown on a page, click the check box to the right of the Department heading. Click the next page of departments, if any. Continue adding departments. When finished, click Save Selection.
- 5 The departments added appear in a list. You can limit using the Department and Name boxes. Click the column heading to sort the list. To delete a department, click .
  - 6 To unassign all the departments from the account, click the Unshare With All Departments link.
  - 7 When finished, click the Favorites link at the top of the page.

---

*Add groups starting from the top level to the bottom level.*

---

## Approval Management


If your dealer has enabled this feature, you can set up individuals to approve orders. When an order exceeds a certain amount, you can require that the order be approved after it is submitted. For example, orders less than \$200 may not require approval but orders exceeding \$200 must be approved. When an order requires approval, an email is sent to the approver you select. The order must be approved before it can be processed. To effectively use this feature, you set up approval groups.

---


*You can also click the Management menu and click Favorites Admin Management.*



---

### Add Approval Groups

- 1 From the Account Administrator Dashboard page, under Approval Management, click Manage Customer & Department Approval Groups.
- 2 The Approval Group Management page opens, as shown in Figure 15. To view groups by customer, click the down arrow in the Search for Group By Customer box and select the customer from the list. This drop down box defaults to display the customer's first and last name within any approval group.
- 3 Search filters let you limit by Account Group, Description, Created Date, and Group Type.
- 4 The customer group and department information can be expanded. Click  corresponding to the group name. You can quickly view all the customers within a group. Department groups display the department number and name. Customer groups display the Customer Name, UserName and Email address.


5 This page lets you perform a variety of tasks, including:

Click  to edit an existing approval group. This page lets you edit information and also create new approval groups. If you click a group in the Approval Chain section, you can view and change the group's detail. For details, see **Approval Group View**.

Click  to delete an existing approval group. At the Are You Sure prompt, click OK. Groups displaying  cannot be immediately deleted. There are two reasons why a group cannot be deleted. Orders could be awaiting approval for the specific group. Or the specific group has approval groups below it in the group hierarchy. These groups must first be manually deleted in the correct sequence, from bottom to top.

Click  Add New Approval Group. The Approval Group wizard opens. To add a new group:





- 5.1 Click the down arrow in the Account box and select the account number to assign this group.
- 5.2 Click the Description box and enter a description for this approval group.
- 5.3 Click the Email CC Address on Approval Emails box and enter the address.
- 5.4 Click Next. On the Group Type page, select either Top Level, Customer, or Department.
- 5.5 Click Next. Click the down arrow to assign members to this group. You can also click Use Grid to Select Options to select members using a list.

By hovering the cursor over the  symbol, you can view reasons why the group cannot be deleted.

Members can include customers or departments, depending on the type of group you are adding.

### Approval Group Management

Search for Group by Customer:

		Account	Description	Created	Group Type
		050510			
▼	 	050510 - CINCO DE MAYO CUSTOMER	second	6/30/2010 4:32:35 PM	Customer
		<b>Customer Name</b>	<b>User Name</b>	<b>Email</b>	
		ryan smith	ryansmith	customer@doesnothaveemail.com	
		doc writer	docwriter	writer@ddms.com	
▶	 	050510 - CINCO DE MAYO CUSTOMER	test one today	6/30/2010 4:31:57 PM	Customer

**Figure 15: The Approval Group Management Page**

---

**Note:** If you are creating a Top Level approval group, click Finish. This completes the procedure.

---

5.6 Click Next. On the Limits page, set the limits for this approval group.

5.7 Click Next. On the Approvers page, click the down arrow in the Available Approvers box to select the approvers for this group.


---

**Note:** You can assign approvers to as many groups as needed. This is useful when one approver is required to handle orders for multiple departments.

---


5.8 Click Finish.

5.9 After you set up groups, you can view approval chains. You can access approval chains and easily make changes using the following, three methods:


- Click the Management menu, select Approval Management, and choose Approval Chains. Select the account and click the approval group to view.
- Click the Management menu, select Approval Management, and choose Approval Groups.. Click  beside the group. The Approval Group View page opens, displaying approval chain information.
- Click Customer Admin and choose Dashboard. Retrieve the customer to open the Customer View page. Click the approval group to view.


## Approval Group View

This page lets you view and change settings for approval groups. You can see a glance all the settings for a group and also make changes to the approval chains within the group.

- 1 From the Approval Group Management page, click  beside the group to view or change.
- 2 The Approval Groups View page opens. See Figure 16. This page is divided into sections so you can easily view the settings for this group.


Click  Add New Approval Group to add a new group. For details concerning adding, see the previous heading Approval Groups.

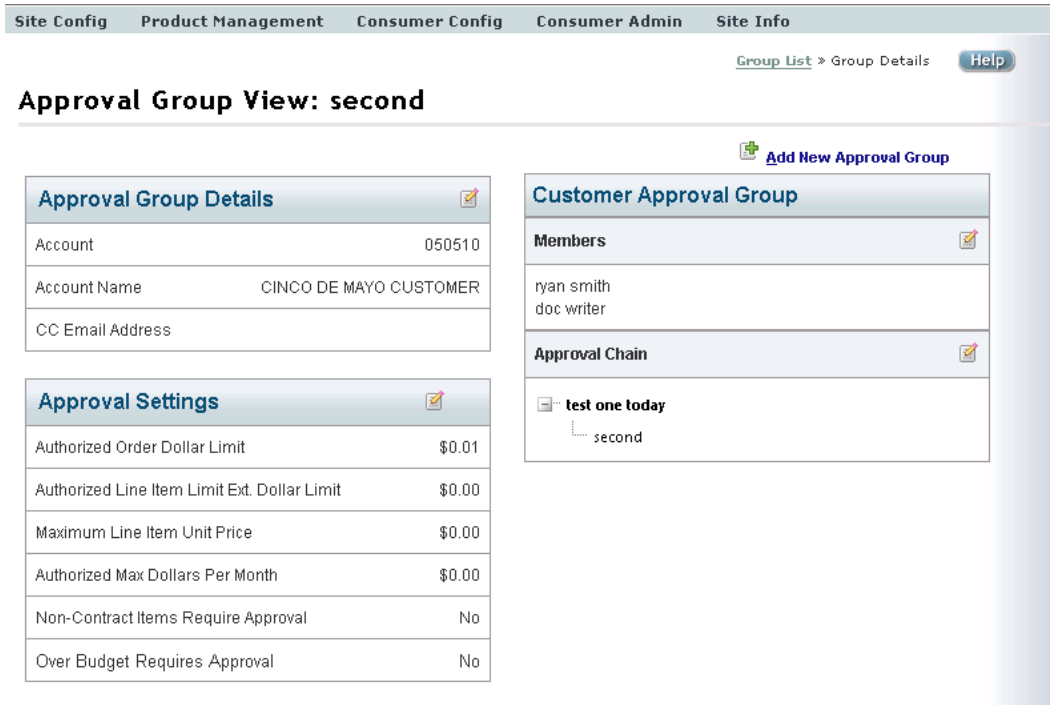
Click  beside the information to change. The Approval Groups wizard opens, displaying information for the section you selected to edit. When finished, click Save.

In the Approval Chain section, to change settings, click  to view settings for the group, or click the group's name to open the Customer View page for that group.

## Approval Chains

You can easily view and edit settings for the approval chains you have set up.

- 1 Click the Management menu, select Approval Management and click Approval Chains. You can also access Approval Chains settings in the Approval Group View and Customer View pages.
- 2 The Approval Chains page opens. Click the group to view.
- 3 When the Approval Group View page opens, under the Approval Chain section, click  to change settings for the group.
- 4 Set each of the following limits:
  - Authorized Order Dollar Limit
  - Item Limit Ext Dollar Limit
  - Line Item Unit Price
  - Max Authorized Monthly Dollars
  - Non-Contract Items Requires Approval
  - Over Monthly Budget Requires Approval.
- 5 When finished, click Save.



The screenshot shows the 'Approval Group View: second' page. At the top, there is a navigation bar with 'Site Config', 'Product Management', 'Consumer Config', 'Consumer Admin', and 'Site Info'. Below this is a breadcrumb trail 'Group List > Group Details' and a 'Help' button. The main content area is divided into three sections:

- Approval Group Details:** A table with fields: Account (050510), Account Name (CINCO DE MAYO CUSTOMER), and CC Email Address.
- Approval Settings:** A table with fields: Authorized Order Dollar Limit (\$0.01), Authorized Line Item Limit Ext. Dollar Limit (\$0.00), Maximum Line Item Unit Price (\$0.00), Authorized Max Dollars Per Month (\$0.00), Non-Contract Items Require Approval (No), and Over Budget Requires Approval (No).
- Customer Approval Group:** A section with 'Members' (ryan smith, doc writer) and 'Approval Chain' (test one today, second).

**Figure 16: The Approval Group View Page**