

*ECinteractive® &
is.D-Force2®*

Administrative Site:

Version 11.1.0



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Viewing S.P. Richards Enhanced Content

Enhanced web services are now available with Etilize that allows the use of S.P. Richards Enhanced content information in both the Shopping Cart and other list pages, including Favorites, Contracts, Laundry Lists, Web Specials, and so on. This enhancement also supports additional content such as ProductPro and FurnitureAdvantage which is not included in standard Content files.

We have also added the ability to automatically complete search entries when using S.P. Richards Enhanced Content feature. When the shopper begins typing an entry, the system automatically begins displaying data that most closely matches the information specified.

Setting Order Dollar Amounts

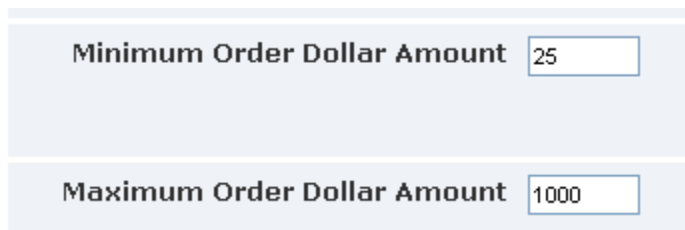
This new enhancement lets you set a minimum and/or maximum dollar amount limit that must be attained before a shopper can submit an order. See Figure 1. This limit can be set at the shopper level using Checkout settings. If a shopper attempts to submit the order prior to attaining the set dollar threshold, the site displays a warning message and offers to place the order on hold.

You can also click Customer Settings on the left side of the page and select Site Checkout.

- 1 On the Administrative Web page, click the Consumer Config training toolbar and choose Checkout.
- 2 Select a Checkout group setting to change or add a new one for use with this feature.
- 3 Scroll down the page and enter a minimum and/or maximum dollar amount according to the following:


Minimum Order Dollar Amount: Enter a minimum (pre-tax) dollar limit for each order placed. To use this feature, enter the minimum dollar limit all in one string. For example, to place the minimum order limit at \$10.00, enter 10 in this box. The system checks the order total when the shopper opens the Checkout page. (You enter the text the user sees in the User Order Limits tab on the Site Text Assignment page.)

Figure 1: Setting a Minimum and/or Maximum Order Dollar Amount



Minimum Order Dollar Amount	<input type="text" value="25"/>
Maximum Order Dollar Amount	<input type="text" value="1000"/>

Maximum Order Dollar Amount: Enter a maximum (pre-tax) dollar limit for each order placed. To use this feature, enter the maximum dollar limit all in one string. For example, to place the maximum order limit at \$1,000, enter 1000 in this box. The system checks the order total when the shopper opens the Checkout page. (You enter the text the user sees in the User Order Limits tab on the Site Text Assignment page.)

- 4 Save your changes.
- 5 Click the Site Config training toolbar and choose Site Text Assignment.
- 6 Click the User Order Limits tab.
- 7 Click  beside the box to change. Enter the new text over the existing text.
- 8 When finished, save your changes. When ready to begin using the feature, assign the Checkout group setting to the account and/or shopper.

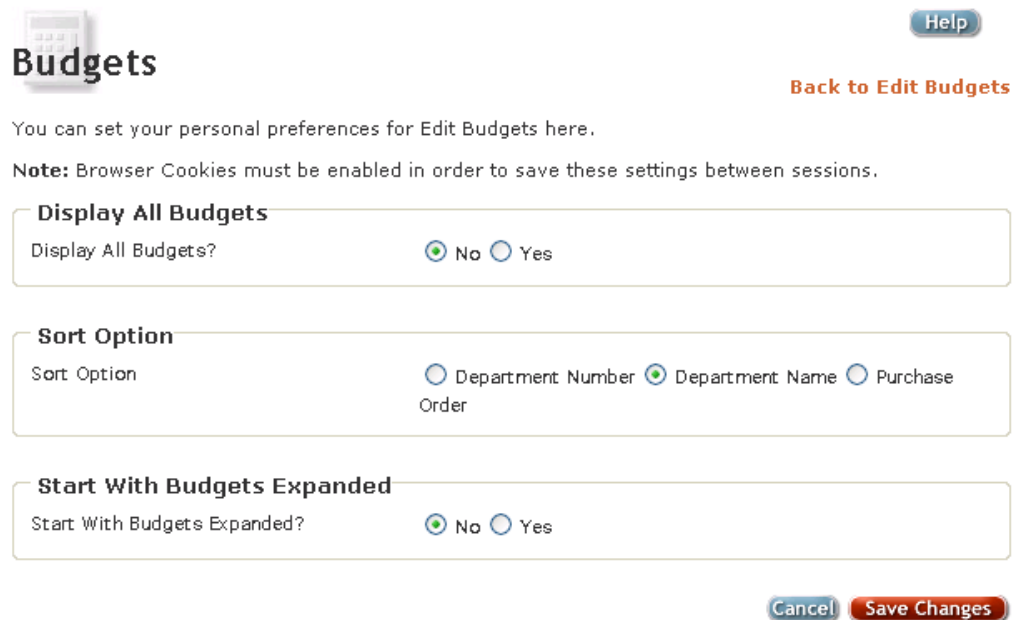
Editing Budget Settings

You can use this feature to specify default budget settings, shown in Figure 2. By adjusting default settings, you can easily re-sort most of the columns on this page.

Note: Make sure your browser cookies are enabled. This ensures that your settings are saved between sessions.

- 1 Login to the End User's site.

Figure 2: The Budget Settings Page



Budgets Help

[Back to Edit Budgets](#)

You can set your personal preferences for Edit Budgets here.

Note: Browser Cookies must be enabled in order to save these settings between sessions.

Display All Budgets
Display All Budgets? No Yes

Sort Option
Sort Option Department Number Department Name Purchase Order

Start With Budgets Expanded
Start With Budgets Expanded? No Yes

Cancel Save Changes

- 2 Click the MyAccount drop down menu and choose Edit Budgets.
- 3 On the Edit Budgets page, click the Budgets Settings link.
- 4 In the Display All Budgets section, click Yes to display all budgets on the page. Click No to not display all budgets.
- 5 In the Sort Option section, click Department Number, Department Name, or Purchase Order to specify how the system sorts the budget information on the page.
- 6 In the Start With Budgets Expanded section, specify whether to expand the budgets when the page is first opened. Click Yes to expand budget information. Click No to not expand.
- 7 Click Save Changes. You are returned to the Edit Budgets page. Or, to return to the Edit Budgets page without saving changes, click Back to Edit Budgets in the top right corner.

Guest User Enhancements

When guest users shop and then access the Checkout page, additional information is now required before the order can be completed. See Figure 3. These boxes include the following:

- **First Name:** This box is required and prints on confirmation emails.
- **Last Name:** This box is required and prints on confirmation emails.

Review and Complete Your Order

Please review your order, and then click Place My Order to submit it. Required fields have **red labels** and an asterisk.

Figure 3: The Guest User Checkout Page

The screenshot displays two sections of the checkout page. The first section, titled "Contact Information", contains four input fields: "First Name: *", "Last Name: *", "Email Address: *", and "Phone: *". The "Phone" field is split into a main field and an "Ext:" field. The second section, titled "Billing Address", contains four input fields: "Name:", "Address:", "Suite:", and "City:". The "City" field includes a dropdown menu. A red button labeled "Add Coupon or Promo" is located above the Billing Address section.

- **Email:** The Email box is not new. Previously, it was the only box in this section of the Guest User Checkout page. The email address must be in the email@address.com format to be accepted. It appears on confirmation emails.
- **Phone:** This box is required. The phone number must include the area code and be in the 8885551234 or 888-555-1234 format. It is shown on the confirmation email.
- **Ext:** This box is not required. The shopper can complete the order without entering a phone number extension. It is shown on the confirmation email.

Sorting a Product List by Price is currently not available when using the United SmartSearch feature in this version 11.1.0 release.

Sorting a Product List By Price

We have added the ability to sort a product listing by price. This feature has been added to the product listing pages, including Browse Catalog; the Product Results pages, both standard and enhanced; Favorites; Contracts; and Laundry Lists. You can enable this feature for an entire site using Site Preferences, as shown in Figure 4. You can also enable this feature for individual accounts and shoppers using the Price group settings.

Note: Before shoppers can use this feature, the Sort By Price function must first be enabled by the Administrator.

If Sort By Price is enabled, when the shopper searches for items, the Sort By box appears. See Figure 5.

When viewing both standard and enhanced content, this box contains the following options:

- Relevance (default)
- Price High to Low
- Price Low to High

Edit Site Preferences

Edit settings for general preferences.

Include Product Descriptions in Search	<input checked="" type="checkbox"/>
Edit Budget Link Text	<input type="text" value="Edit Budget"/>
Local Time Zone	<input type="text" value="(GMT-06:00) Central Time (US & Canada)"/>
Default Primary Wholesaler	<input type="text" value="United Stationers"/>
Acsellerate Account	<input type="text" value="9561"/>
Deleted Favorite Items Text	<input type="text" value="Discontinued Items"/>
Number of Days to Display Changed Favorite Items	<input type="text" value="Never Expires"/>
Show Show HON Microsite Custom LinkCustom Link	<input checked="" type="checkbox"/>
Sort By Price	<input checked="" type="checkbox"/>

Figure 4: The Sort By Price Option in Site Preferences

If the default option, Relevance, is not changed, the page displays the search results as it normally would. If the option is changed to Price High to Low or Price Low to High, more information is shown for every product in the list, for up to 1,000 products. Items that cannot be ordered are moved to the bottom of the list. These products also appear with a ⚠️ symbol under the Your Price column.

When viewing S.P Richards Enhanced content, the page that appears provides additional options. When Price High to Low or Price Low to High is chosen, a new Price Filter box appears that can be used to further limit the search. See Figure 6.

Figure 5: The Sort By Price Feature When Using Standard Content

Search Results

Sorted alphabetically by Item #.

Show Products By Category Start New Search

Item #	List Price	Your Price	Packaging	Quantity
BICBP11BE	\$21.00	\$21.00/Dozen	1 Dozen/Box	1

Pro+ Retractable Ball Pen, Blue Barrel, Blue Ink, Medium Point

Comments:

Add to Cart Add to Favorites

Figure 6: The Sort By Price Feature When Using S.P. Richards Enhanced Content

Hide Search Options

Total Results: 33

Page 1 of 4 0 Products selected Sort by: Price Low to High Items per Page: 10

Select All	Item #	List Price	Your Price	Packaging	Quantity
<input type="checkbox"/>	TEPT92001	\$2.99	\$2.99/Set	1 Each	1
<p>Trend Terrific Trimmers Star Bright Trimmer</p> <p>Rectangle with Scalloped Trim - 2.25" x 39" - Paper - Blue, Yellow</p> <p>Comments: Add to Cart</p>					
<input type="checkbox"/>	TEPT9882	\$2.99	\$2.99/Each	1 Each	1

Price filter

\$2 to \$19 (33)

\$ - (0) Go

Select Features

Brand Name (33)

Note: Sorting a Product List by Price is currently not available when using the United SmartSearch feature in this version 11.1.0 release.

MyMachines

For sites using S.P. Richards catalogs, the newly streamlined MyMachines shopping tool allows you to search by printer or cartridge number in one text entry field, or by selecting your manufacturer from a drop-down list. The search results are in two columns:

- **Matching Models:** copiers, printers, and similar office equipment.
- **Matching Supplies:** ink and toner cartridges and related kits and supplies.

eContent Tools

The new eContent Import tool lets you add spreadsheets of hundreds of catalog items into a Workspace, validate the items against your ERP business system, and synchronize with your site's catalog content. For comparison, the

Figure 7: The eContent Import Page

Custom eContent

- [Quick Import](#)
- [Create New Catalog](#)
- [Replace Existing Catalog\(s\)](#)

Export Existing Data to XML

[Content Import Help](#)

Select an Existing Catalog:

[Export Content](#) [Export Categories](#)

Workspaces

.11 MB out of 50 MB being used. 49.89 MB Available

			Workspace	Size	Status	Requested Sync Date	Modified
			100611 WORKSPACE	0 MB	Sync Successful	10/14/2011	10/14/2011 12:00 AM
			100311 WORKSPACE	0 MB	Sync Successful	10/7/2011	10/7/2011 12:00 AM
			My eContent	0 MB	Validation Successful	11/4/2011	11/3/2011 4:14 PM
			dt13940	0 MB	Sync Successful	10/7/2011	11/3/2011 11:40 AM
			eContent Import	0 MB	Created		11/3/2011 11:37 AM

21 items in 5 pages

Email Notifications

Receive Notifications?

Email:

DHARRISON@ECISOLUTIONS.COM

Multiple emails should be separated by semi-colon ";" without space.

[Update](#)

existing Custom Product Management Dashboard lets you add or edit only one item at a time. We've provided an XML Import Helper to assist you in formatting the data to reduce problems in validation.




- 1 On the left side of the Administrative site, click eContent tools and select eContent Import.
- 2 The eContent Import page opens. See Figure 7. This page is divided into four sections: Custom eContent, Export Existing Data to XML, Workspaces, and Email Notifications.

Custom eContent

This section allows three options for importing custom eContent.

- **Quick Import:** This option lets you quickly import custom content. Using this option, you are not prompted to upload a catalog file. However, you can create one from the custom content you're importing.
- **Create New Catalog:** This option lets you upload content and catalog detail in a separate file. Using this method, you are prompted for both files which allows you to upload either content or catalogs, or both at once.
- **Replace Existing Catalog(s):** This option is the same as creating a new catalog with one exception: You are prompted to select an existing catalog(s) to replace for each catalog file added.

Importing Content

- 1 Click  Quick Import,  Create New Catalog, or  Replace Existing Catalogs.
- 2 Click the Workspace Description box and enter the description to use. The workspace allows you to group the files being uploaded, which helps you identify the data. Click Next.

eContent: Quick Import

Import Content XML

XML file 'Sample_Content_File.xml' imported and validated successfully.

Next, we'll import a content file. This file will be used to update and add new items to your custom products. This file is expected in XML format. For further information on the required format click [here](#) or how to create a file in this format click [here](#): **Import Helper**. This content is NOT being imported to your site. The content will only be viewable from this workspace until you have reviewed it and approved it for import live. You may upload one content file per workspace.

I want to Create a Custom Catalog from this Data

Imported Content File		
File Name	Type	File Size
  Sample_Content_File.xml	Content File	0 MB

Figure 8:
Successfully
Importing the
File

- 3 In the Import Content XML box, enter the content file to import, or click Browse to select the file on your hard drive.
- 4 Make sure the I Want to Create a Custom Catalog From This Data box is checked. This creates a catalog file containing the item company, item number, and categories. If this box is left blank, categories in the content file are not included.
- 5 After selecting the file, click Import.
- 6 When the Imported and Validated Successfully message appears, click Next. See Figure 8.
- 7 On the Request Live Sync Date page, click the down arrow in the Action box and specify whether to create a new catalog or replace an existing catalog.

Workspace data is unavailable on the site until the sync process has completed. This lets you review and modify details before moving any data to a live site.

To create a new catalog, click the Create New Catalog option. In the New Catalog Name box, enter the catalog name to use.

To replace the catalog, click the Replace Existing Catalog option. Click the down arrow in the Existing Catalog box and select the catalog to replace.

Workspace: Demo Workspace

Figure 9: The Workspace Details Page

Workspace Info

Workspace Status: .05 MB

Workspace Size: .05 MB

Requested Live Sync Date:

ERP Validated? [Request Offline Validation](#)

Compared to Live Data?

Workspace Actions

- [Edit Workspace Description](#)
- [Add Catalog XML File](#)
- [Validate Content in ERP System](#)
- [Compare to Live Data](#)
- [Request Live Sync Date](#)
- [Delete this Workspace](#)

Uploaded Content Files

			File Name	Type	File Size	Validated	Compared	Last Modified
▶				eContentSampleREDUX.xml	Content File	.04 MB		8/26/2011
▶				Generated Catalog from eContentSampleREDUX.xml	Catalog File	0 MB		8/26/2011

Workspace Log

Date	Action	Comments	Username
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

No Log Information Available for this Workspace

If you clicked Skip and did not select the Requested Live Sync option, when the Workstation Dashboard opens, the Dashboard contains more options.

- 8 Specify when to sync the data you have uploaded.
 - To sync the data now, click the Request Live Sync button.
 - To sync the data later, click the Requested Live Sync date box and specify the date to sync the data you have uploaded. Click Skip.
- 9 The Workspace Details opens, displaying information for the eContent catalog data you uploaded. See Figure 9. For more information, see the heading Viewing Workspace Details.




Export Existing Data to XML

This section of the eContent Import page lets you export the data to an XML file. You can then manipulate the data using an XML editing tool, Excel, Notepad, and so on.

- 1 Click the down arrow in the Select an Existing Catalog box and click the catalog to use.
- 2 Specify whether to Export Content or Export Categories.
 - Click Export Content to export the content stored in the selected catalog.
 - Click Export Categories to export the categories stored in the selected catalog.
- 3 When prompted, save the information to a location on your hard drive.

Workspaces

This section of the eContent Import page lets you view Workspace details. You can also view alerts and delete Workspaces.

- To view Workspace alerts, click  beside the Workstation to view.
- To view more Workspace details, click  beside the Workstation to view. For information, see the heading **Viewing Workspace Details**.
- To delete an existing Workspace, click . At the Are You Sure prompt, click OK.


Email Notifications


This section of the eContent Import page lets you specify whether to receive notifications by email.


- 1 Click the Receive Notifications option.
- 2 Click the Email box and enter the email address of the person to whom notification emails should be sent. To enter more than one, separate each address with a semicolon.
- 3 Click Update.

Viewing Workspace Details

- 1 The Workspace Details page contains valuable information. You can perform many useful tasks and functions, including the following:

Click  Edit Workspace Description to change the Workspace description.


Click  Add Content File to add one content file to the Workspace. This option only appears if a content file is not currently associated with the Workspace.

Click  Add Catalog XML File to add an additional catalog XML file to the Workspace.


Click Validate Content in ERP System to validate the content against the ERP's online system. This option is only available if the Workspace contains less than 2000 items.


Click Compare to Live Data to compare the Workspace items to the existing content (Global and Custom). The page displays how many new items will be added to custom content as a result of syncing the data contained in the Workspace as well as how many items already exist in the Global content. This helps identify an item that already has wholesaler content so it is not accidentally replaced.

Click Request Live Sync Date to enter a live sync date.

Click  Delete this Workspace to remove the Workspace. Doing so can free disk space associated with this Workspace.

Click Request Offline Validation to compare the uploaded data against the ERP using an offline process. If notifications are enabled, an email is sent after the data has been validated. This option can be used with Workspaces containing more than 2000 items.

Click  Data Review beside an uploaded Content file to review the uploaded data. You can also change the data before requesting a live sync.

Click  Export Data beside an uploaded Content file to export the data to your local hard drive. You can then manipulate the data using an XML editing tool, Excel, Notepad, and so on.

- 2 Under the Workspace Log section of the page, you can set limits for the data to view. This section displays possible Log Actions including:

Created: A new Workspace was added.

Validation Requested (workspace locked): Indicates that an offline validation has been requested, or the Workspace has been scheduled for a final sync.

Validation Successful: Indicates the validation process completed successfully. The Workspace must be at this status before the live content sync can begin.

Sync in Progress (workspace locked): Indicates that the Workspace is being synced against live content.

Sync Successful: Signifies that a Workspace has been successfully synced against live content.

Validation Failed: The offline validation has failed. This status is reached after validation has been attempted several times.

Sync Error: The sync process with live content has failed. This status is reached after live sync has been attempted several times.

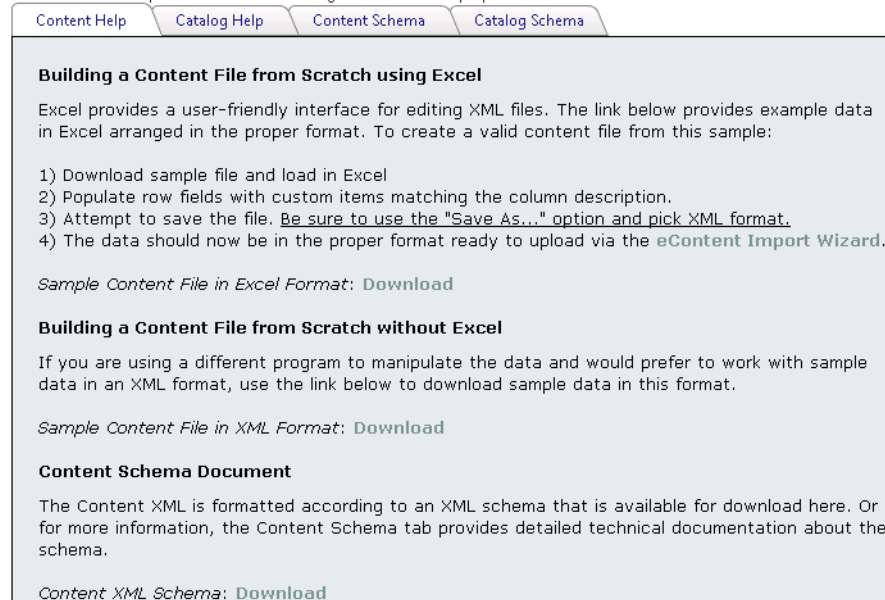
- 3 When finished viewing and changing, click the Dashboard link at the top of the page.

XML Import Helper

This page was designed to help you understand basic information concerning the formats to use when importing data. Using the tabs on this page, you can download a sample XML or XSL file, in addition to an XSD file. An XSD file is a technical XML schema document that defines the acceptable data format for each type. Since you can download both Content and Catalog files, this page contains tabs for each type. This page also includes help on how to manipulate XML files using Excel. See Figure 10.

XML Import Helper

eContent Import requires that XML files conform to a specific format. This page will provide information about this format in addition to downloadable sample data to aid in creating XML files in the proper format.



The screenshot shows a web page with four tabs: "Content Help", "Catalog Help", "Content Schema", and "Catalog Schema". The "Content Help" tab is active. Below the tabs, there are three main sections:

- Building a Content File from Scratch using Excel**

Excel provides a user-friendly interface for editing XML files. The link below provides example data in Excel arranged in the proper format. To create a valid content file from this sample:

 - 1) Download sample file and load in Excel
 - 2) Populate row fields with custom items matching the column description.
 - 3) Attempt to save the file. Be sure to use the "Save As..." option and pick XML format.
 - 4) The data should now be in the proper format ready to upload via the **eContent Import Wizard**.

Sample Content File in Excel Format: [Download](#)
- Building a Content File from Scratch without Excel**

If you are using a different program to manipulate the data and would prefer to work with sample data in an XML format, use the link below to download sample data in this format.

Sample Content File in XML Format: [Download](#)
- Content Schema Document**

The Content XML is formatted according to an XML schema that is available for download here. Or for more information, the Content Schema tab provides detailed technical documentation about the schema.

Content XML Schema: [Download](#)

Figure 10: The XML Import Helper Page