



# ECinteractivePLUS®: Administration Guide

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ECinteractivePLUS® represents next-generation web storefronts and online customer service solutions for your business system. These solutions feature an e-commerce storefront application that runs on a platform designed from the ground up to provide you with a significant advantage in competing for online business.

## Site Config

This section of your administrative website includes setting your passwords, security information, admin users, site and image management, and your company information.

### Change Password

1. Click the Site Config training toolbar and select Change Password.
2. Click the Password box and enter your current password.
3. Click the New Password box and enter the new password. You must specify at least six alphanumeric characters.
4. Click the Confirm New Password box and enter the new password again.
5. Click Change Password.

### Change Security Q/A

When changing your password, you must correctly answer a security question. You select your security question and set the answer on the Change Security Q/A page.

1. Click the Site Config training toolbar and select Change Security Q/A.
2. Enter your password in the Current Password box.
3. Click the Security Question drop-down menu and select a question.
4. Enter the answer for the security question in the Security Answer box.
5. Click Update.

### Site Selection


This page is useful when you have multiple sites. It lets you choose a site as the default when logging in.

1. Click the Site Config training toolbar and select Site Selection. The system displays a list of available sites.
2. Check the Make the Selected Site My Default Site When I Login box.
3. Under the Site Name heading, click the site to select as the default when logging in.
4. Your changes are saved. The system returns to the Admin Home page.

### Admin User Maintenance

1. Click the Site Config training toolbar and select Admin User Maintenance.

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**Note:** To refresh the page, click. .

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2. On the Current Admin Users page, you can:

- Click to edit existing admin users.
  - Click to delete existing admin users who no longer require access. At the Delete This User prompt, click OK. Those users that display as Online cannot be deleted.
  - Click to unlock admin users. To determine if a user account is locked, look for a check mark in the Locked column. Accounts are locked after five unsuccessful attempts to log in.
3. Click to add an additional admin user.

- 3.1 Click the UserName box. Enter a name for this user.
- 3.2 Click the Email box and enter the user's email address.
- 3.3 Click the Password box and enter a password for this user. You must specify at least six alphanumeric characters.
- 3.4 Click the Confirm Password box and re-enter the password.
- 3.5 Click the Security Question drop-down menu and select a security question for the user. If the administrative user forgets the password, you can email this security question to the user.
- 3.6 Click the Security Answer box and enter the answer to the security question.
- 3.7 Enter any comments about this user in the Comments box.
- 3.8 If the user is approved, click Approved. To deny the user access, clear the box.
- 3.9 In the Roles section, select the role for this user. You can assign a user to the Dealer role (senior or upper level management) or to the Dealer Support (sales managers, customer service managers, and so on) role.

- 3.10 In the Sites Allowed section, check the box next to each site to which to grant the user access.
- 3.11 Click the Comments box and enter any comments about this admin user.
- 3.12 Check the Approved box to mark this user as approved. This box is checked by default.
- 3.13 When finished, click .


## Site Appearance

You can use this page to choose the theme and layout for the front-end site. To refresh the page, click .

1. Click the Site Config training toolbar and select Site Appearance.
2. Click the Update Theme drop-down menu and select a color theme for the front-end site.
3. Click the Layout drop-down menu and select a site layout for the front-end site. You can select Framed Site or No Frames. This option allows you to frame the storefront site within your company's existing website.

## Image Management

You can use the Image Management feature to load a logo image for your administrative and end user home pages. This tool is just another way to customize your site to appeal to your customers.

1. Click the Site Config training toolbar and select Image Management.
2. To load logos, do the following:
  - 2.1 Click Choose File to locate the logo to upload.
  - 2.2 Click Upload New Image. The image is added to the Existing Image List. It is also saved to the image server.
  - 2.3 Once you have uploaded the image, place it on the website. In the Existing Image List section, click the name of the image to place, LOGO.gif, for example. The image opens.
  - 2.4 To make the image display as your logo throughout the front-end website, click Save As Logo Image.
3. For images other than logos, you can do the following:
  - Upload image files. These files can be used when you create various pages using Text Editor.
  - Delete image files. To do so, click the image to highlight it and click .

## Site Info

You can use the Site Info page to provide your company information.

1. Click the Site Config training toolbar and select Site Info.
2. Click Edit.


Site Info <span style="float: right;">Help</span>	
You can maintain site address and contact information here	
Dealer Name	<input type="text" value="Demo"/>
Dealership Initials	<input type="text"/>
Phone Number	<input type="text"/>
Fax Number	<input type="text"/>
Address Type	<input type="text" value="Shipping"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="Texas"/>
Postal Code	<input type="text"/>
Main Website Address	<input type="text" value="qa.ecinteractive.com/demo"/>
Sales Contact Name	<input type="text" value="Sales Contact Here"/>
Sales Email	<input type="text" value="lewisb@ec2.com"/>
Service Contact Name	<input type="text" value="Service Contact Here"/>
Service Email	<input type="text" value="lewisb@ec2.com"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

3. Click the Dealer Name box and enter a new name for the site.
4. Click the Dealership Initials box and enter the new initials for the site.
5. Click the Phone Number box and enter a new phone number. You must enter numeric characters in this box. If you enter alpha characters, the phone number displays as (000) 000-0000 on emails and remittance forms.
6. Click the Fax Number box and enter a new fax number. You must enter numeric characters in this box. If you enter alpha characters, the fax number displays as (000) 000-0000 on emails and remittance forms.
7. Click the Address Type drop-down menu and select an address type, Billing or Shipping, for example. Since online accounts receivable features are available, we recommend that you do not select the Remit A/R option.
8. Click the Address Line 1 box and enter Line 1 of your address.
9. Click the Address Line 2 box and enter Line 2 of your address, if applicable.
10. Click the City box and enter your city's name.
11. Click the State drop-down menu and select your state.
12. Click the Postal Code box and enter your postal code.
13. Click the Main Website Address box and enter a new site name. This main Web address is automatically identified when the front-end page is created. This website address prints on remittance forms and when printing information from the Order History page.

14. Click the Sales Contact Name box and enter a new sales contact name. The information in this box displays on confirmation emails as the From addressee name.
15. Click the Sales Email box and enter a new salesperson's email address. The information in this box displays on confirmation emails as the From addressee email address.
16. Click the Service Contact Name box and enter a new service contact person. The information in this box displays on confirmation emails under the dealer's address.
17. Click the Service Email box and enter a new service email address. The information in this box displays on confirmation emails under the dealer's address. If you allow shoppers to add, edit, and delete credit cards on the back-office business system, an email is sent to the address specified in this box whenever credit cards are added or changed. Make sure an email address is set up in this box if you intend to use this feature.
18. Click Update.

## Site Preferences

This page allows you to view and edit the preferences for your site.

1. Click the Site Config training toolbar and select Site Preferences.
2. Click  next to the section to edit. Enter new information over the existing information. When you finish changing information in each section, click Save.

### General Preferences

- **Include Product Descriptions in Search:** You can use this box to specify that the system include or exclude the item's description when the shopper searches for products. To include the product description, check this box. To exclude the product description, clear this box.
- **Edit Budget Link Text:** Click this box to change the text of the link that displays on the shopper's top menu. This link displays in the My Account drop down menu. This box defaults to Edit Budget. You could change it to Edit Your Budgets, for example.
- **Local Time Zone:** Use this drop-down menu to set the time zone for your front-end site.
- **Default Primary Wholesaler:** Use this drop-down menu to select your default primary wholesaler. The default you select here can be used with microsites.
- **Acsellerate® Account:** Click this box and enter your Acsellerate dealer ID. This allows your shoppers the ability to access Acsellerate on the front-end site and review report information. After you enter your dealer ID in this box, retrieve the shopper's account on the Customer View page and assign an Acsellerate user name and password.
- **Deleted Favorite Items Text:** Click this box and enter the button text to display on the front-end site for deleted favorite items. When a favorite list containing a deleted item is viewed on the front-end site, a button displays. The default button text is Discontinued Items. When a shopper clicks the button, a dialog box opens and displays the deleted items.
- **Number of Days to Display Changed Favorite Items:** Click this drop-down menu and select how many days a changed favorite item number displays on the front-end site. You can select Not Shown, 30, 60, or Never Expires.



- Number of Days to Retain Carted Item's Price:** Click this box and enter the number of days item prices are retained for carted or saved orders. Normally, saved or open orders are re-priced accordingly when the shopper checks out. This ensures that if you have loaded a pricing update, for example, updated item prices are reflected. However, if you enter a number of days in this box, the item's original price is retained for the number of days you specify. For example, if you set this box to three days, item prices for carted or saved orders are retained for up to three days. After the fourth day, all item prices are recalculated. Since it allows shoppers to retain the item's original price, this feature is especially helpful when using governmental accounts and requisitions.
- Show HON Microsite Custom Link:** Check this box to display the HON Furniture link at the top of the front-end website, along with Shopping and Featured Items.
- Sort by Price:** Check this box to enable the Sort By Price feature on the front-end website. When shoppers use standard content, S.P. Richards Enhanced Content, or Essendant™ Smart Search features, this function lets them sort by price. You can also enable or disable this feature for specific customers in their Price settings. This box only displays if the Sort by Price feature is enabled.
- Browser Tab Title (Company Name):** ECinteractivePLUS uses search engine optimization (SEO) to promote your website's visibility on the internet and bring more traffic to your site. SEO allows users of web search engines like Google and Yahoo® to find your site more easily than websites that do not use SEO. This box works as an SEO tag. Most Internet browsers display website names or pages in the title bar or tab. This box lets you create custom browser tab text for the front-end website. Click this box and enter custom browser tab text to display on the front-end website. The allowed combined text limit for this box and the Browser Tab Title (Company Description) box is 70 characters. This may vary according to your browser. For example, if you enter ABC Company in this box, the tab name displays as ABC Company.
- Browser Tab Title (Company Description):** ECinteractivePLUS uses search engine optimization (SEO) to promote your website's visibility on the internet and bring more traffic to your site. SEO allows users of web search engines like Google and Yahoo to find your site more easily than websites that do not use SEO. This box works as an SEO tag. Most Internet browsers display website names or pages in the title bar or tab. This box lets you create custom browser tab text for the front-end website that displays after the page name. Click this box and enter custom browser tab text to display on the front-end website. The allowed combined text limit for this box and the Browser Tab Title (Company Name) box is 70 characters. This may vary according to your browser. The information entered in this box displays after the information enter in the Browser Tab Title (Company Name) box. For example, if you enter ABC Company in the Browser Tab Title (Company Name) box and enter Software Solutions in this box, the browser tab displays ABC Company - Software Solutions.
- Meta Tag - Description:** ECinteractivePLUS uses search engine optimization (SEO) to promote your website's visibility on the internet and bring more traffic to your site. SEO allows users of web search engines like Google and Yahoo® to find your site more easily than websites that do not use SEO. Your site's optimized information includes product details and a customizable site description linked to your Home page. Click this box and enter a description for your site. This description is linked to your site's Home page.

- **Search Bar Text:** Click this box and enter custom text that displays in the Search box on the front-end website. You can enter up to 50 characters in this box. If you leave it blank, the text in the Search box remains Enter Keyword or Item #.
- **Display Product Health Warnings:** Click this drop-down menu and specify for whom to display product warnings on the shopper's site. You can select California Only or All States/Provinces. This setting defaults to California Only. Product warning messages are intended to inform shoppers about exposures to chemicals known to cause cancer, birth defects or other reproductive harm. The warning messages are required by law in the State of California and is known as California Proposition 65, the Safe Drinking Water and Toxic Enforcement Act of 1986. For more information go to [www.P65Warnings.ca.gov](http://www.P65Warnings.ca.gov).
- **Allow Shared Cart:** Check this box to enable the Shared Cart feature.
- **Show Email Link on Product Detail Page:** Check this box to enable the Email link on the Product Detail page.
- **Send Pay Invoice Emails:** Check this box to disable confirmation emails when shoppers pay invoices.

### Customer Registration

- **Allow Customer Registration:** You have several options when setting this feature. Select from one of the following:
  - **Create Online Account:** Allow shoppers to register an account on the front-end site. This setting can be used when potential shoppers already have an account set up on the back-office business system. Selecting this option forces them to supply their back-office account information before proceeding. It prevents them from creating a back-office account during the account creation process.
  - **Create Back-office and Online Account:** Allow shoppers to register an account on the front-end site and on the back-office business system. This setting can be used for potential shoppers who are not already assigned to a back-office business account. Selecting this option forces them to create a new back-office account before proceeding.
  - **Allow Both Methods:** Allow shoppers to register an account on the front-end site and the back-office business system. This setting combines both settings described above. It allows shoppers to supply an existing back-office account if they are already assigned to one or it allows the shopper to create a new back-office account before proceeding. For this method, an additional prompt asks shoppers which method they prefer to use to create a new account.
  - **No Automatic Account Creation:** Do not allow shoppers to register. If you select this option, the shopper enters information which is sent to you as an email but the information is not entered into the back-office business system nor is a shopper account created on the front-end site. This gives you the option of adding the shopper to the back-office and front-end systems. This is the default response.
- **User Type Selection During Registration:** This section works with the Allow Customer Registration section and lets the shopper select a user type from a list of user types when creating a new account. You can set up multiple user types using the User Types page. Click

the Allow User Type Selection option to allow shoppers the ability to select a user type when creating an account. To deny users the ability to choose a user type when creating a new account, click the Use Default User Type option.

- **Add Custom Registration Questions:** Use these boxes to add up to three custom questions for new end users. Click each box and enter the question to ask. You can also check the Required box next to a question to mark it as required on the front-end site. Required questions are indicated by a red asterisk on the front-end site.

### Credit Cards

- **Accepted Credit Cards:** Check the box next to each credit card shoppers can use when paying for purchases. You can also check the box at the top of the column to select all credit cards. The card types you select display in a drop-down menu on the Checkout and Remit A/R pages on the front-end website. No card types are selected by default.
- **Credit Card Polling Frequency:** If you receive a failure when trying to communicate your credit card information, this drop-down menu lets you specify the number of additional times to try. Click the drop-down menu and select the number of times. You can choose from 1, 2, 3, 4, 5, 10, 15, 30, or 60 times. If you set this box to 4, for example, the system tries 4 additional times to poll or communicate and authorize the card.
- **Manage Credit Card Link Text:** This box applies to the shopper's Credit Card Editor page. If you allow shoppers to add, edit, or delete credit cards, this box lets you specify the link text that displays on the site. Click this box to change the text of the link that displays on the shopper's top menu. This link displays in the My Account drop-down menu. This box defaults to Manage Credit Cards. You could change it to Manage Your Credit Cards, for example.

### Tax Fields

- **Use/Display Multiple Tax Fields:** Check this box to display more than one line of tax information in the Order Summary section on the Checkout page. If you check this box, multiple tax information also displays in order confirmation emails. This is a useful feature for Canadian customers who use GST and PST taxation. If you check this box, use the Tax Label 1 and Tax Label 2 boxes to define the text labels for the tax lines that display on the front-end website.
- **Tax 1 Label/Tax 2 Label:** These boxes work with the Use and Display Multiple Text Fields box. Click each box and enter the text for the tax that displays in the Order Summary section on the Checkout page and in order confirmation emails. This is a useful feature for Canadian customers who use GST and PST taxation.

### Category Display Order

- **Expand Category Display on Home/Catalog Pages:** Check this box to expand the content provider categories on the shopper's Home and Browse Catalog pages. If you check this box and the total number of first-level categories is greater than six, all content providers' first-level categories are displayed in alphabetical order. Second level categories are not displayed. Each category acts as a link allowing the user to click it to open the next level categories.
- **Regular Categories:** In this tab, check the box next to each content provider to use. Click Get Categories to display the first-level categories for all selected providers. Then, click the Rank box and enter the order the selected provider displays in this list.

- **Enhanced Categories:** In this tab, use the Rank box next to each category to set the display order for the top-level categories set by your enhanced content provider. Check the Hide In Vertical Menu box next to each category to hide in the vertical menu. Check the Show In Horizontal Menu box next to each category to show in the existing horizontal menu.

### Google Analytics

- **Google Analytics ID:** Use this box to enter the identification number for use with the Google Analytics™ feature. You can use Google Analytics to learn which online marketing initiatives are cost effective and see how visitors actually interact with your site. Doing so can help you make informed site design improvements, drive targeted traffic, and increase your conversions and profits. This online tool is offered by Google free of charge. For more information, see [www.google.com/analytics/features.html](http://www.google.com/analytics/features.html). You must [sign up](#) for Google Analytics before you can use this tool on your administrative site. Once you have signed up with Google, input the tracking code provided by Google in the Google Analytics ID box.

### States and Provinces

- **Restrict Shipping States for Guest Shopper Only:** Check this box to restrict guest shoppers to certain shipping states/provinces. Then, drag the states/provinces to exclude from the Allowed States/Provinces box and drop them in the Restricted Sales/Provinces box. When you move a state/province to the Restricted States/Provinces box, that state/province is not included in the shipping address options for the shopper. If a shopper uses a restricted state/province on an order, an email notification is sent to the email address specified in the Sales Email box on the Site Info page. If you leave the Restrict Shipping States For Guest Shopper Only box unchecked and move states/provinces to the Restricted States/Provinces box, all shoppers are restricted from shipping to those states/provinces.

### Checkout Settings

- **Always Land User on Checkout Edit Page:** This box is cleared by default. If this box is checked, when shoppers click Checkout on the front-end site, they are taken to the Edit Order Details page instead of the default Review Order Details page.
- **Allow Change Payment Method on Checkout Review Page:** Click this box to allow shoppers to select a payment method on the Review Order Details page (shoppers can still select a payment method on the Edit Order Details page). If a shopper enters new credit card information on the Review Order Details page, the Place Order button is temporarily removed while the credit card is validated. Once the card is validated, the Place Order button reappears and the shopper can place the order.
- **Delivery Fee Enabled:** This box is cleared by default. Click this box to enable the state delivery fee for Colorado. The delivery fee is added to orders with taxable items being delivered to Colorado addresses. For more information, see [Setting Up the State Delivery Fee](#).




### Max Quantity/Dollars


You can also specify Max Quantity/Dollars settings at the account level by clicking the Consumer Admin training toolbar, Account Management, Account Management, and clicking Max Quantity/Dollars Management.


- **Max Quantity Per Line Item:** Enter a maximum quantity shoppers can purchase of any single line item. The default is 9999 line items. If you leave this box blank, there is no maximum quantity amount. Your shoppers can order an unlimited number of any single line item.

- **Error Message When Max Quantity Exceeded:** Click this box and enter the text the user sees when exceeding the maximum item quantity allowed for each item. If the shopper exceeds the item amount, the system displays a warning message on the Checkout page. This box defaults to display the text You Have Exceeded the Maximum Allowed Quantity.
- **Max Dollars Per Invoice:** Enter a maximum (pre-tax) dollar limit for each order your users place. Enter the amount all in one string. For example, to place the maximum order limit at \$1,000, you would enter 1000 in this box. This box defaults to \$9,999.000. The system checks the order total when the shopper opens the Checkout page.
- **Error Message When Max Dollars Exceeded:** Click this box and enter the text the shopper sees when exceeding the maximum dollars allowed for each invoice. If the shopper exceeds the total amount, the system displays a warning message on the Checkout page. This box defaults to the text You Have Exceeded the Maximum Dollars Per Invoice.

### Quantity On Hand

- **Edit Quantity On Hand Setting:** Specify how to display your available on hand quantities to the shopper.
  - **Do Not Display Quantity On Hand:** Disable the ability to view on hand quantities. If you select this option, the Quantity On Hand feature is disabled for the entire site. Any shopper-specific on-hand quantity settings you specified are ignored.
  - **Use an Icon to Display Quantity On Hand:** Display an icon for in-stock and out-of-stock items. The system defaults to use  as the in-stock icon and  as the out-of-stock icon. You can customize the default icons using the Quantity On Hand Icon section. If you are using the Essendant Inventory Awareness feature, the system defaults to use  as the Sufficient Quantity icon.
  - **Use Text to Display Quantity On Hand:** Display text for in-stock and out-of-stock items. The system defaults to use In Stock and Out of Stock as the default text. You can customize the default text using the Quantity On Hand Text section.
- **Edit Blank Quantity On Hand Setting:** Specify how to handle items you don't stock (non-stock). For DDMSPLUS, when an ECinteractivePLUS shopper orders an item you don't stock, the system returns a blank on hand quantity. You can specify how the system should display this information to the shopper on the front-end site.
  - **Do Not Display:** Do not display on hand quantities for non-stock items.
  - **Out of Stock:** Display the out-of-stock icon or Out of Stock text for non-stock items.
  - **In Stock:** Display the in-stock icon or In Stock text for non-stock items. You can use this option for non-stock items since you can easily purchase them to complete the shopper's order.
- **Quantity On Hand Icon/Text:** Use this section to specify your icon and text preferences.
  - **Use an Icon to Display Quantity on Hand:** If you selected this option, the Quantity On Hand Icon section displays and lets you choose the icon that displays for in-stock and out-of-stock items. You can also choose to not display an icon for out-of-stock items. You can enter the tooltip text the user sees when the cursor hovers over the icon. When editing

text, click  to insert the text `[[inventory_count]]` that is replaced on the front-end site with the item's on hand quantity. If you are using the Essendant Inventory Awareness feature, the Sufficient Quantity icon setting also displays.

- **Use Text to Display Quantity on Hand:** If you selected this option, the Quantity On Hand Text section displays and lets you customize the text that displays for in-stock and out-of-stock items. You can also choose to not display text for out-of-stock items. When editing text, click  to insert the text `[[inventory_count]]` that is replaced on the front-end site with the item's on hand quantity. If you are using the Essendant Inventory Awareness feature, the Sufficient Quantity text setting also displays.
- **Wholesaler Quantity On Hand:** Check this box to include wholesaler on hand quantities in search results. To view the wholesaler item with the settings you selected, click the Test Item # box and enter a wholesaler item number. Click Test Pipeline. If the test is unsuccessful, contact ECI Support.
- **Essendant Inventory Awareness Function:** Use this section to specify your Essendant Inventory Awareness preferences.
  - **Enable Essendant Inventory Awareness:** Check this box to enable the Essendant Inventory Awareness feature. Once you check this box, three additional boxes display: Filter Out of Stock Items, Bury Out of Stock Items, and Include Dealer Quantity On Hand.
  - **Filter Out of Stock Items:** Check this box to remove out-of-stock Essendant items from the search and navigation results on the front-end site. This box is cleared by default.
  - **Bury Out of Stock Items:** Check this box to bury out-of-stock Essendant items in the search and navigation results on the front-end site. This option places out-of-stock items at the end of the search and navigation results. This option is enabled by default.
  - **Include Dealer Quantity On Hand:** Check this box to merge your stocked inventory counts with the Essendant inventory counts. This option is enabled by default.
- **Essendant Inventory Awareness Settings:** Use this section to specify your Essendant Inventory Awareness preferences. This section only displays if you have checked the Enable Essendant Inventory Awareness box in the Essendant Inventory Awareness Function section.
  - **Email:** Click this box and enter an email address where you can be notified of any changes to the list of available Essendant facilities. This box is optional.
  - **Sufficient Quantity:** Click this box and enter a numeric value that specifies the item quantity that can be in-stock before an item is considered low-stock. The default value for this box is five. This means that any item with a quantity of less than five displays a low-stock message on the front-end site. The low-stock message can be customized using the Quantity On Hand Icon/Text section. The Sufficient Quantity includes both your stocked inventory counts and Essendant's inventory counts.
- **Essendant Inventory Awareness Facilities:** Update the Essendant Facilities section, if needed. This section allows you to manage which Essendant facilities to use with the Inventory Awareness feature. If no facilities are selected, all facilities are used with the Inventory Awareness feature. This section only displays if you have checked the Enable Essendant Inventory Awareness box in the Essendant Inventory Awareness Function section.

## ERP Preferences

- **Default Order Taker:** Enter a default order-taker for all the orders that come through the system. You can specify up to four alphanumeric characters. The order-taker you specify must be set up in the Salesperson Database on your back-office system. This box is blank by default.
- **Journal Limit for Order History:** This box displays the number of months shoppers can search for order history. This box is set to 6 months by default. To change it, click the drop-down menu and select the number of months. You can choose from 0 months to 12 months. If you set this box to 0, shoppers can only view orders from the existing P-MASTER and JOUR-PO files.
- **Use Back-office Categories in Contract/Laundry List:** Check this box to use the back-office business system category headers for contracts and laundry lists. Leave this box blank to use wholesaler categories for contracts and laundry lists. This box is blank by default.
- **Allow Advanced Manifest:** Check this box to allow shoppers to use the Advanced Manifest feature.

## Enhanced Content Provider

- **S.P. Richards/SPR Canada:** Select this option to set S.P. Richards or SPR Canada as your enhanced content provider. Click the Content Provider drop-down menu and select S.P. Richards or SPR Canada. Click the site ID box and enter your identification number. Contact S.P. Richards/SPR Canada for this information.
- **Essendant:** Select this option to set Essendant as your enhanced content provider. Then, click the Dealer ID and Password boxes to enter your Essendant ID and password. Contact Essendant for this information.
- **None:** Select this option to not use an enhanced content provider.

## Display Item Savings/Discount

- **Enable Display Item Savings/Discount:** Check this box to display item savings/discounts on the front-end site. This box is cleared by default.
- **Display Savings/Discount As:** Select the Amount option to display savings as a dollar amount. Select the Percentage option to display discounts as a percentage.
- **Do Not Show Savings/Discount Message If Savings/Discount Is Less Than:** Click this box and enter a numeric threshold for the savings/discount amount. For example, if you are displaying savings as a dollar amount and you enter 5 in this box, items with savings of less than 5 dollars do not display a savings message on the front-end site. Similarly, if you are displaying discounts as a percentage and you enter 5 in this box, items with discounts of less than 5% do not display a savings message on the front-end site. When displaying discounts as a percentage, you must enter the percentage as a numeric value between 1 and 100.
- **Customized Savings/Discount Text:** Click this box and enter the text to use for the savings/discount message. You can enter up to 15 characters in this box. The default value for this box is Save.
- **Custom Customer Price Text:** Click this box and enter the text to use for the customer price. You can enter up to 15 characters in this box. The default value for this box is Sale.

**S.P. Richards Analytics** (This section does not display if SPR Canada is selected as the ECP.)

- **Campaign Advantage Analytics:** Select this option to use S.P. Richards Campaign Advantage Analytics.
- **Anonymous Analytics:** Select this option to use S.P. Richards Anonymous Analytics.

### ERP Connection

- This section displays the IP Address, Port, Rest Port, and Terminal IP for the connection. This information is for display only.

### Recurring Orders Preferences

- **Enable Recurring Orders:** Check the Enable Recurring Orders box to enable the Recurring Orders feature on the shopper's front-end site. Clear the Enable Recurring Orders box to deny access. This feature is disabled by default in Site Preferences. You must check this box to allow shoppers to place recurring orders. If you enable the Recurring Orders feature and later disable it for the site, or for an account, or for a shopper, all recurring orders are deleted for the site, account, and/or shopper.
- **Discount Percentage Per Item:** Click this box and enter the percentage by which to discount recurring items. For example, to allow a 10% discount, you would enter 10.00 in this box. The system uses the following order to determine the discount percentage: customer level, account level, and site level. If the customer level is different than the account, the customer-level discount is used. If the account level is different than the site, the account-level discount is used. If both the customer level and account level are not changed, the site-level discount is used.
- **Apply Discount Qualifications:** Click this drop-down menu and specify the orders to which the discount applies. You can select 1st Order Only or All Orders. If you select 1st Order Only, the discount only applies to the first instance of each recurring order the shopper creates. For example, supposed a shopper creates a new recurring order. The discount is applied to that first instance of the order, but not to the next instance. For example, suppose the shopper creates a new recurring order. The discount is applied to the first instance of that order. If the shopper later creates a different recurring order, the discount is also applied to the first instance of that order, and so on.
- **Number of Days for Advance Email Notification:** Click this box and enter the number of days before shoppers receive an email notifying them that the recurring order date is approaching.
- **Item Company:** Click this box and enter the item company to use for the Recurring Orders feature on the front-end website. The item company you enter must exist in the back-office system. This option is only available when changing recurring orders settings for the entire site.
- **Item Number:** Click this box and enter the item number to use for the Recurring Orders feature on the front-end website. The item number you enter must exist in the back-office system. This option is only available when changing recurring orders settings for the entire site.

### SMTP Settings



- **SMTP**
  - **SMTP Host:** Enter the IP address from your email provider.
  - **SMTP Port:** Enter the port number from your email provider.
  - **User Name:** Enter the user name for the email address to be used for outgoing messages.





- **Password:** Enter the password to use. This box is encrypted. You can use this box to change your password after you set it by entering a new password.
- **Use an Encrypted Connection (SSL):** Check this box if required by your email host.
- **From Email:** Enter the email address from which emails are sent. This is also used as a Reply-To address.
- **Default Email From Address:** Enter the default email address from which emails are sent.
- **Log On to Incoming Mail Server First:** Click this box if required by your email host.
- **Incoming Mail Server (POP):** Enter the IP address if required by your email host.
- **Incoming Mail Server Port:** Enter the port number if required by your email host.
- **To Email Address:** Enter an email address for which you can access the Inbox.
- **Email Subject:** Use the default subject: Test Email from ECI SMTP Settings.
- **Email Body:** Use the default body: This is a test email only. This email signifies a successful test of the SMTP Settings for your ECI site.
- **SendGrid® with SMTP**
  - **API Key Value:** Enter the API Key for SendGrid
  - **Use an Encrypted Connection (SSL):** Click this box if required by your email host.
  - **From Email:** Enter the email address from which emails are sent. This is also used as a Reply-To address.
  - **Default Email From Address:** Enter the default email address from which emails are sent.
  - **To Email Address:** Enter an email address for which you can access the Inbox.
  - **Email Subject:** Use the default subject: Test Email from ECI SendGrid SMTP Settings.
  - **Email Body:** Use the default body: This is a test email only. This email signifies a successful test of the SendGrid SMTP Settings for your ECI site.

## Contacts Management

This page stores the information about the contact person for the site. The contacts you specify display on the front-end Contact Us page.

1. Click the Site Config training toolbar and select Contacts Management. The Manage Site Contacts page opens.
2. Click  to add a contact.
  - 2.1 Click the Contact Name box and enter the name of the person to act as contact for the site. This name displays to the shopper. You must enter a contact in this box.
  - 2.2 Click the Email box and enter an email address associated with the contact's name you specified. You must enter an address in this box.
  - 2.3 Click  to save your changes.

3. You can also do the following on this page:


- Click  next to a contact to edit it.
- Click  next to a contact to delete it. At the Are You Sure prompt, click OK.

## Site Text Assignment/Text Editor/Error Text

For more information on customizing site text and messages, see [Customizing Site Text and Messages](#) and [Managing Images in Text Editor](#).

## Location Management

You can manage a G/L location, an inventory location, and a printer ID as a group. The information for each location displays in the grid. You can sort the locations by description, G/L, inventory, or printer ID. Click the column heading to re-sort the grid.

1. Click the Site Config training toolbar and select Location Management.
2. Click .
3. Click the Description box and enter a descriptive name for the group.
4. Click the GL Location box and enter the general ledger location.
5. Click the Inventory Location box and enter the inventory location.
6. Click the Printer ID box and enter the logical name of the printer to use.

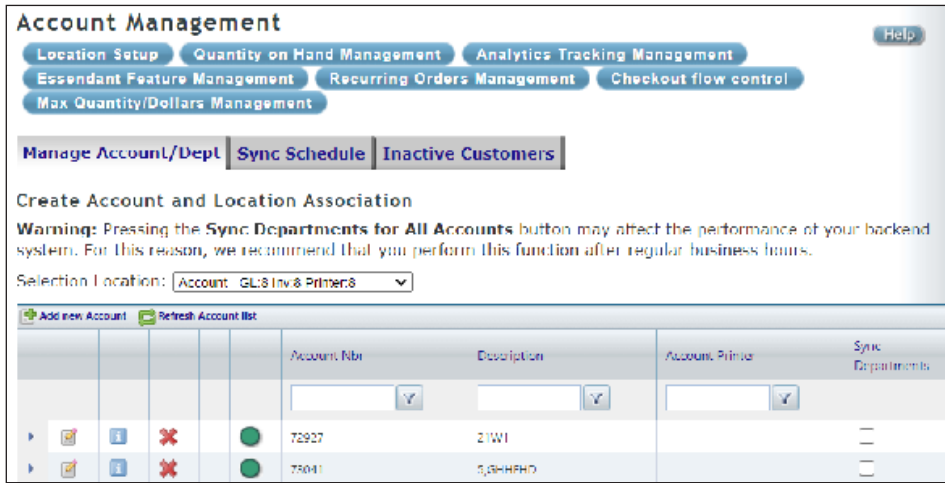
Description	GL Location	Inventory Location	Printer ID
Chicago	2	2	E2

7. Click .



## Account Management

Once you have your groups set up, you can assign accounts to locations. The information for each account displays in the Account Management page. In this page, you can sort the accounts by account code, description, or printer.



1. Click the Site Config training toolbar, Location Management, and select Account Management.





**Note:** Active customers display with a green icon, inactive customers display with a red icon and gray icons indicate an O/E exempt customer. You can view inactive customer information in the Inactive Customers tab.

2. Click the Select Location drop-down menu and choose the location to use.
3. Click .
4. Click the Account Nbr box and enter the customer's account number. The account number you specify must exist in the back-office business system.
5. Click the Account Printer box and enter the logical name of the printer to use, P1, for example.
6. Click . The Account Added Successfully message displays. Departments queue for synchronization to the back-office system automatically.

**Note:** You can manually sync departments, if needed. To do so, check the Sync Departments box next to the account you added, and click Sync Departments for Checked Accounts. At the Are You Sure prompt, click OK. This brings over all departments associated with the account from the back-office system. We recommend you perform this function after regular business hours, as this function can slow your system down and affect your server's performance.


7. Repeat **Steps 3-6** to add as many accounts, as needed.
8. After the departments have been synchronized, you can assign different general ledger and inventory locations to an account's department. The locations you assign do not have to exist in the Location Management page. The master account defaults to the general ledger and inventory locations unless it is changed.
  - 8.1 Click  beside the account number to view the existing departments.
  - 8.2 Click  beside the department to change.
  - 8.3 Click the GL box to assign a general ledger location for this department. The general ledger location you enter overrides the location set up for the account to which this department belongs.

- 8.4 Click the Inv box to assign an inventory location for this department. The inventory location you enter overrides the location set up for the account to which this department belongs.
- 8.5 Click the Printer box to enter the printer to use for this department.
- 8.6 When finished, click .
9. You can use the Sync Schedule tab to specify when the system should sync your accounts in the back-office business system. You can specify to sync accounts on a daily, weekly, monthly, or single time basis. This page helps you better manage your customer accounts. To do so, do the following:
  - 9.1 When the Account Management page opens, click the Sync Schedule tab.
  - 9.2 Using the Sync Schedule options, choose how often the system should sync accounts. You can choose from Daily, Weekly, Monthly, or One Time. Click the appropriate option.
  - 9.3 Click the Next Sync Date box and enter the date when the system should sync accounts. You can also click  to open the calendar and select the date.
  - 9.4 Click the Begin Sync Time (EST) box and enter the time when the system should sync accounts. This box defaults to Eastern Standard Time.
  - 9.5 When finished, click Update.
10. You can use the Sync History tab to view the status of synchronization with the back-office system.
11. You can use the Inactive Customers tab to view customers that are currently marked as inactive. Active customers display with a green icon, inactive customers display with a red icon and gray icons indicate an O/E exempt customer. You cannot change information in this tab; it is for display only.
  - 11.1 From the Account Management page, click the Inactive Customers tab.
  - 11.2 View the accounts that are currently inactive. To access the Customer Account Management page, click the link.




## Remit A/R Settings

The Remittance Address page lets you enter the address that customers use when mailing payments. You must enter a separate remittance address for each G/L location. G/L locations are set up in Location Management. For more information, see [Setting Up Shoppers to Pay A/R Invoices Online](#).

## Site Maintenance

You can use the Site Maintenance page to specify information on your end user's site when the system is down for maintenance. For example, during the software update maintenance period, your website storefront is unavailable. You can schedule your site to be Offline for Maintenance using these instructions. To refresh the page, click .

1. Click the Site Config training toolbar and click Site Maintenance. The Site Status box displays whether the site is currently up or down and the current time. It displays the current time zone and daylight savings time you have selected and cannot be manually changed. This box is automatically updated when the Time Zone and Use Daylight Savings Time boxes are adjusted. The time displays in AM and PM format, not military format. It also displays whether you have the automatic maintenance feature enabled or disabled.

2. The Time Zone box defaults to Eastern Time. To change the time zone, click the Time Zone drop-down menu and select the appropriate time zone.
3. Check the Use Daylight Savings Time box to indicate whether to use the daylight savings time feature.
4. Use the Unscheduled Maintenance box to toggle your e-commerce site off or on for system maintenance whenever necessary. This change affects the e-commerce site within one to two minutes.
  - **Display Page:** Click the Display Page drop-down menu to select the website shoppers view when the site is in unscheduled maintenance mode. To view detail, click the drop-down menu and select the page to view and click . To create a new page, click the Create Pages link.
  - **Shutdown Site:** When you click this button, the shopper's site is turned off. All shoppers accessing the site are unable to open any page or perform any function.
  - **Startup Site:** When you click this button, the shopper's site is turned on.
5. The Automatic Scheduled Maintenance box lets you specify that all your e-commerce sites be automatically shut down for maintenance.
  - **Automatic Maintenance Mode On:** To activate the automatic maintenance mode feature, click this button. At the This Could Inactivate Your Website for Customers Are You Sure prompt, click OK. To deactivate this feature, click the Auto Maintenance Mode Off button.
  - **Weekdays Time Off/Time On/Display Page:** Click the Weekdays Time Off box and enter the beginning maintenance time for Monday through Friday, 11:00 PM, for example. Click the Weekdays Time On box and enter the ending maintenance time for Monday through Friday. These boxes default to 12:00 AM. The time is displayed in AM and PM format, not military time. Click the Display Page drop-down menu to select the page end users view when the site is in weekday maintenance mode. To view detail concerning a page, click . To create a new page, click the Create Pages link.
  - **Saturdays/Sundays Time Off/Time On/Display Page:** Click the Saturdays or Sundays Time Off box and enter the beginning maintenance time for Saturday and Sunday. Click the Saturdays or Sundays Time On box and enter the ending maintenance time for Saturday and Sunday. Both boxes default to 12:00 AM. The time is displayed in AM and PM format, not military time. Click the Display Page drop-down menu to select the page end users view when the site is in weekend maintenance mode. To view detail concerning a page, click .
6. Click Update. The changes are implemented within one minute.

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**Note:** If you are performing these steps for software update maintenance, on Monday, return to these settings, and click Auto Maintenance Mode Off. For your Quarterly Electronic Catalog Maintenance (usually in January, April, July, and October), use the steps above, but set up both Weekday and Weekend times and web pages.

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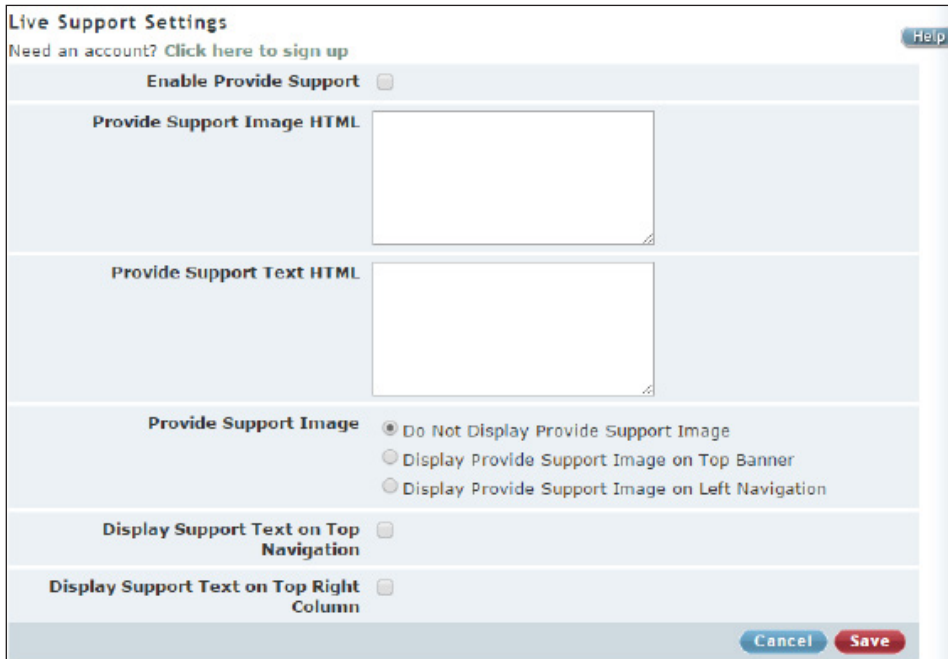
## Help Files

1. Click the Site Config training toolbar and select Help Files. The Help page opens.
2. Help is also available on individual web pages. For example, click Help on the Remittance Address page to view the help topic for the Remittance Address feature.

## Live Support

It's become common for Internet shoppers to chat online with company representatives. With just a click of a button, they can begin a session to ask questions about products or services and receive assistance when placing and completing orders. Shoppers can also provide a name, email address, and questions that can be quickly answered by email. Tools including co-browsing, operator-console, campaign viewing, LiveKeyword, and Live Analytics make offering support to your shoppers easier than ever.

1. Click the Site Config training toolbar and select Live Support Setup. The Live Support Settings page opens.




2. To create an account with Live Support, click the Click Here to Sign Up link. The Provide Support Home page opens in a new tab. On this page, you can view the features and costs, as well as set up an account. Click the Help links on the Provide Support page for more information.
3. After you create an account with Provide Support, return to the Live Support Settings page, and check the Enable Provide Support box.
4. Click the Provide Support Image HTML box. Copy and paste the information for the image to use from the Provide Support website. You can also enter your own HTML image.
5. In the Provide Support Text HTML box, copy and paste the text to use from the Provide Support website or enter your own HTML text.
6. Using the Provide Support Image options, indicate where on the front-end site the image should display. The image can be centered and display in the top banner or you can display the image on the left navigation toolbar. You can also choose not to display an image.
7. Check the Display Support Text on Top Navigation box to display the text link on the right side of the top navigation bar. The text link can be activated simultaneously with the live chat image.

8. Check the display Support Text on Right Column box to display the text link on the right-hand side of the front-end site.
9. Click Save. After you activate the Live Support feature, when the shopper's website opens, the image or text you selected displays in the location you set.

## UI 2022 Dashboard

Before enabling UI22 for your customers, ensure your site is set up with the UI 2022 Dashboard page.

Click Site Customizing from the menu to the left and select UI 2022 Dashboard. The UI 2022 Dashboard page opens. At the top of the page, you can click the Explore UI 2022 button to view the new UI in preview mode.

To copy the URL to your clipboard, click  beside UI 2022 Preview URL.

This page is divided into seven sections. For more information, see the [New UI Checklist](#) handout.

- **Manage Alert:** Click Manage Alert Message to set an alert message for your site home page. You can select Show Now or Schedule and set a start/end date and time for the message.
- **Merchandising Zones:** Click Manage Merchandising Zones to create slide show content with HTML or images. Add, manage, prioritize, preview, and publish theater slide show content from this page.
- **Product Lists:** Click Manage Product Lists to add, edit, and prioritize product lists for your home page. There are four product lists available to display on the home page: Web Specials, Spotlight Item, Recently Viewed, and Recently Purchased.
- **Custom Content Zones:** Click Manage Custom Content Zones to add, edit, and delete the main content for your home page.
- **Custom Header Links:** Click Manage Custom Header Links to add, edit, delete, and select the display order for up to three custom header links. These headers display in addition to standard product categories that display as part of the Products menu in the header.
- **Manage Site Logo:** Click Manage Site Logo to upload and delete primary size and mobile size images for your site.
- **SEO Content:** Click Manage SEO Content to add content specifically for search engine optimization to your home page. This content displays directly above the footer and is designed to take up minimal space on the home page screen.

## New UI Activation

Preview and permanently enable UI22 on the New UI Activation page.

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**Note:** If you use Digital Service for customization, contact Digital Services for enabling the new UI.

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1. Click Site Customizing from the menu to the left and select New UI Activation. The New UI Activation page opens.
2. To enable preview mode, click Enable Preview then Save. The following message displays: Preview Has Been Enabled For This Site. You can explore the new UI in preview mode without enabling it for your customers. After you enable preview mode, a checklist and option to permanently enable the new UI display.
3. Review the checklist before enabling the new UI. Click items on the checklist to go to the corresponding page on the site. For more information, see the [New UI Checklist](#) handout.

4. To permanently enable the new UI, click Permanently Enable New UI for All Customers. The Enable New UI button displays.
5. Click the Enable New UI button. The Enable New UI dialog box opens.

**Note:** You cannot go back to preview mode after you click OK in the Enable New UI dialog box.

6. Click OK to enable the new UI. The new UI is enabled and the following message displays: New UI Has Been Permanently Enabled For This Site.

## Product Management

This section of your administrative website includes managing your catalogs, items, web specials, and preferred items.

### Custom Product Management

For more information on customer product management, see [Setting Up Custom Items and Catalogs](#).

### Manufacturer Management


Although the Manufacturer Management page allows you to add new manufacturers, DO NOT modify any data on this page. Any changes made affect all dealer sites. We are developing an enhancement to allow dealers to add custom manufacturer information (primarily for custom items).

1. Click the Product Management training toolbar and click Manufacturer Management.
2. When you finish viewing information, close the Manufacturer Management page.

### Web Specials

You can create specials with special pricing for items ordered online (as opposed to ordering by phone, fax, or in person). You can forecast dates for special promotional periods. Items must have e-content provided by the vendor, or they must reside in the global or custom catalog that is assigned to the end user. You can add custom items, as well.

**Note:** While you can create more than three web specials, only three display on the end user's page.

1. Click the Product Management training toolbar and select Web Specials. The Manage Web Specials and Spotlight Items page opens.
2. To add a new web special/spotlight item:
  - 2.1 Click .
  - 2.2 Click the SKU box and enter the company prefix and item number. You can enter up to 23 characters in this box.
  - 2.3 Click the Description box and enter a descriptive name for this web special. You can enter a maximum of 30 characters.

**Note:** The cursor does not move to the UM box. The unit of measure is automatically pulled from the back-office business system after you retrieve the item.

- 2.4 Click the Price box and enter the special sell price.



- 2.5 Click the Begin Date box and enter the date the special begins. You can also forecast dates, if needed. To select a date from a calendar, click . This box defaults to the system date.
- 2.6 Click the End Date box and enter the date the special ends. You can also forecast dates, if needed. To select a date from a calendar, click . This box defaults to one year in advance of the system date.
- 2.7 When finished, click to save your changes. A should display for this item to the shopper. If this icon does not display, the pricing for the shopper is lower than the web special's price.

**Manage Web Specials and Spotlight Items**

Add, Edit, or Delete

import Refresh List

SKU	Description	Web Special	Spotlight Item	Ranking	UM	Price	Begin Date	End Date
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
SKU:	<input type="text"/>							
Description:	<input type="text"/>							
Type:	Web Special							
UM:	<input type="text"/>							
Price:	<input type="text"/>							
Begin Date:	11/3/2015							
End Date:	11/3/2016							
				<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>


3. You can also do the following on this page:

- Click next to a web special to change it. Enter the new information over the existing information and click .
- Click next to a web special to delete it. At the Delete Selected Specials prompt, click OK.
- Click to preview web specials as a customer.

## Preferred Items


You can use this tool to rank items when the shopper performs advanced searches. The item displays in the Best Sellers column in search results. The higher the item rank, the higher the item displays in the product list.

1. Click the Product Management training toolbar and select Preferred Items.
2. Click Add New Item.
3. Click the Keyword box and enter a keyword for this item. The keyword you specify must be a keyword or be part of the item's description for it to display as a preferred item. For example, if you add FEL00001 with the keywords File Folder and file folder is not part of the FEL00001 item's keyword or description in e-content, this item does not display as a preferred item when a shopper enters File Folder as part of a keyword search.

4. Click the Item Company box and enter the item's manufacturer.
5. Click the Item Number box and enter the item's stock number.
6. Click the Rank box and enter the sales rank of the item. The higher the item rank, the higher the item displays in the product list.
7. Click .

## Merchandising Products

Use the Manage Merchandising Product page to manipulate the order in which items display in the product list on the front-end website. To do so, you assign them to non-ranking and ranking icons. Both icon types represent a group of items that you associate with a specific image. The image you select displays with the item on the front-end site. Non-ranking icon items display in the order in which a standard list would place them. Ranking icon items display first in the overall product list. First in search is ranked from 1 to 999999, with 1 representing the highest rank. You can use the following file types: .PDF, .XLS, and .DOC. Images also display as attributes on the Advanced Search page. You can only have one ranking icon at a time.

1. Click the Product Management training toolbar and select Merchandising Products.
2. Click Load Files.
3. Click Choose File to locate the files to be loaded. You can add as many files, as needed.
  - To add more files, click Add.
  - To delete files, check the box corresponding to the file and click Delete.
  - To remove an existing file, check the box corresponding to the file to remove. Click Remove.
4. Click Load Files.
5. When finished, click Continue.
6. Add a new icon to the list. Once the icon is added, you can assign items:
  - 6.1 Click  Add New Icon. The Name through Link Path boxes open.
  - 6.2 Click the Name box and enter a descriptive name for the new icon.
  - 6.3 Select the image to use. You can do the following:
    - To load a custom image, click Choose File and browse to the location of the image on your computer. Click Open.
    - Select one of the default icons to use.
  - 6.4 Check the Is Ranking Icon box to indicate this is a ranking icon.

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**Note:** Non-ranking and ranking icons differ as to where items display on the product list. Non-ranking icon items display in the order in which a standard list places them. Items assigned to a ranking icon display as the first items in the overall product list.

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- 6.5 Click the Link Type drop-down menu and select either File or HREF. File refers to one of the files you have loaded, while HREF refers to linking an icon to a specific URL.

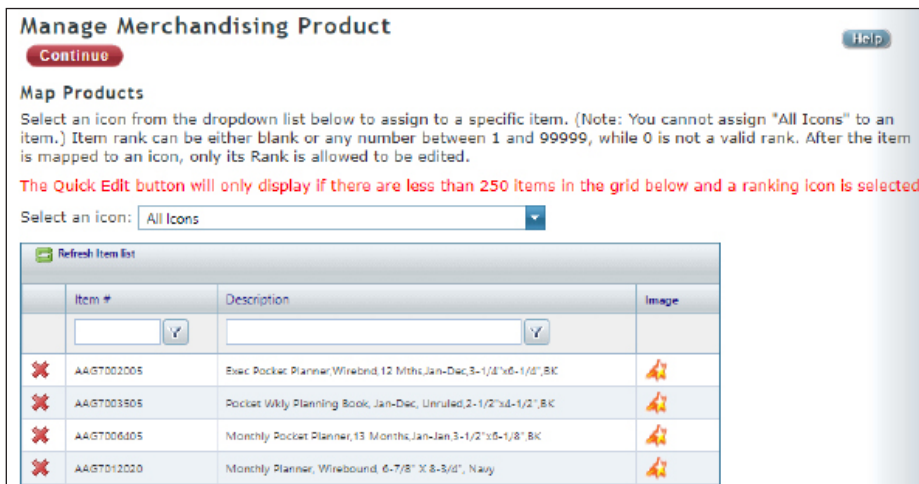
6.6 Click the Link Path drop-down menu and select the path for this icon. If you selected File, select the file to link to the icon. If you selected HREF, enter the URL to link to the icon.

6.7 Click  to add the icon.

7. Assign an icon to an item and assign it a rank. The rank indicates how high an item displays in the item list when the shopper searches. Suppose you assign a gel pen a rank of 2 and a ball point pen a rank of 1. When the shopper searches for pens, because you assigned the gel pen a rank of 2, it displays second on the list, while the ball point pen displays first.



You can also use this page to mass add items to ranking icons. When you mass add, you must assign the item information to the same ranking icon. You cannot use the All Icons option. You also cannot mass add items to non-ranking icons. The mass add feature only applies when using ranking icons.

7.1 Click Map Products.



7.2 Click the Select an Icon drop-down menu and choose the icon to assign to the item.

7.3 You can now assign a new item to the displayed icon, including both ranking or non-ranking icons. Or, if you are adding several items to a ranking icon, you can click Quick Edit to mass add items to the displayed icon. You cannot use the mass add feature with non-ranking icons. The Quick Edit option only displays if there are less than 250 items and a ranking icon is selected.

- To add items individually, click . Click the Item # box and enter the item prefix followed by the item number, such as ZEB22210, for example. Click the Rank box and assign the item a number. The number you specify indicates where the item displays in the item list on the shopper's page. If you leave the Rank box blank, items default to display in alphabetical order. Click  to save the information. The item is assigned to the icon with the rank you specified.
- To mass add items to a Ranking Icon, click Quick Edit. The page refreshes and the cursor moves to the Item # box. Enter the item number. Click the Rank box and assign the item a number. Press Enter. The cursor moves to the next Item # box so you can continue to assign items and their corresponding ranks. You can click any Item # and rank box to

change the information. When finished, click Save. After you click Save, you can re-sort the data. To do so, click the Sort By drop-down menu and select the method by which to sort, Item #, Rank, or Description. You can sort by ascending or descending order.

**Note:** The Quick Edit option does not display if you select a non-ranking item. To view the Quick Edit button, click the Select an Icon drop-down menu and choose a non-ranking icon.

7.4 You can add as many items to icons as needed.

7.5 When finished, click Continue.

**Note:** You can also delete an existing item from an icon. To do so, click . At the Are You Sure prompt, click OK.

## Contract/Laundry Lists

Contracts do not have to be added to display pricing. This lets you create special pricing on an item or group of items. A laundry list displays items that a shopper purchases on a regular basis.

1. Click the Product Management training toolbar and select Contract/Laundry Lists. You can also click Site Info from the menu to the left and select Contract/Laundry List Management. The Contract/Laundry List Management Page opens.
2. Click Add a New List.

List Name	List Type	Display Name	Item Count	Sync Schedule	Account	Department	Group Name	Last Sync	Next Sync
SJAnother	Advanced Contracts	tj for 901 and 8441	3	None	901	8441		3/18/2022 3:51:08 PM	
X1	Contract	Display contract	35218	None				4/16/2013 7:38:40 AM	

2.1 Click the List Name box and enter the contract or laundry list ID created in the back-office system. The contract/laundry list you specify must be entered exactly as it displays in your back-office business system.

**Note:** To use the laundry list feature, you must set the Kit box in the Item Settings tab to M or C, the Company box must be blank, and the Option field in the (L1) Terminal and Ticket Parameters screen must be set to B for Bill of Materials.

2.2 Click the List Type drop-down menu and select Contract, Laundry List, or Advanced Contracts.


2.3 Click the Display Name box and enter the name of this contract/laundry list. The text you enter displays on the front-end site.

- 2.4 Click the Sync Schedule drop-down menu and select the time when the system updates this contract/laundry list. You can choose from None, Daily, Weekly, Monthly, or One Time.






---

**Note:** After the system synchronizes the information overnight, the Next Sync column updates to reflect the sync schedule date you specified. You can also sync the data now to update the Next Sync column. If the Sync Schedule column is set to None or to One Time, the Next Sync column is blank.

---

- 2.5 Click the Account box and enter the account information for your contract/laundry list.
- 2.6 Click the Department or Group Name box and enter the departmental or group name information for your contract/laundry list.
- 2.7 Click  to save your changes. The contract/laundry list is added to the list and the Back-office List Inserted message displays. After you have added the contract/laundry List, you must assign it to customers for it to display on the front-end site.

3. You can also do the following on this page:

- Click  next to a contract/laundry list to edit it. Enter the new information over the existing information. When finished, click .
- Click  next to a contract/laundry list to delete it. At the Delete This List prompt, click OK.
- Click  to view a list of items assigned to a contract/laundry list. Click  to collapse the information again.

4. Click Sync Now to gather items and changes for the contract or laundry list immediately with information from the back-office system. The You Have Chosen to Sync the List Please Click the Sync Now Button to Start the Process prompt displays.
5. Click Sync Now.
6. At the Synchronize This List With Your Back-office System Right Now prompt, click OK. The system displays a progress bar while the system synchronizes the records.
7. When the process is complete, the List Successfully Synchronized With Back-office System message displays. The system also displays the number of items contained within the contract or laundry list you added.

### Provider Priority Mgmt

The Wholesalers Priority Management page works with the Catalog Combination Indexing (CCI) feature. On this page, you can generate the CCI for possible catalog group combinations. This ranking index helps eliminate duplicate search results and speeds up retrieval of items on the front-end site. All web catalog content providers are assigned a default rank, with your dealer-customized, site-specific catalog at the top.

This ranking determines which unique item number is used when global and custom catalogs have the same numbers in common. For example, suppose item number ABC1234 is found in both S.P. Richards and Essendant catalogs, and S.P. Richards is ranked higher than Essendant. In this example, the front-end site would display S.P. Richards categories, product details, and images for that common item. If your custom catalog has ABC1234, and your site name is ranked highest, the site displays the content you entered for that item.

Adding new custom catalog items updates this CCI immediately, while other changes are updated daily during non-business hours.

**Note:** If the website uses the S.P. Richards Enhanced Search feature, the ranking does not affect Browse Categories, Search Results, or Product Detail. In this case, the third-party provides this information. However, the wholesaler priority ranking still determines the content that displays in Favorites, Contracts, Laundry Lists, Web Specials, and Preferred Items.

1. Click the Product Management training toolbar and select Provider Priority Mgmt. The Wholesalers Priority Management page opens.
2. Click the Select a Site drop-down menu and select the site that contains the wholesaler to rank.
3. In the Rank the Wholesalers section, click the Rank box next to each item and enter the appropriate rank. To remove all displayed ranks, click Clear Ranks.
4. When finished, click Save.

### Find Catalogs by SKU

This page can help you easily determine which items are stored in specific catalogs. You simply select the current site for which to view items, enter the item's company and number and the list of catalogs where this item displays is shown. The list of catalogs shown are based on the site's provider priority and includes both wholesaler and custom catalogs. After the catalog list displays, click the Catalog Name and Provider column headings to re-sort the data.

1. Click the Product Management training toolbar and select Find Catalogs by SKU.
2. Click the Site drop-down menu and select the site for which to view item and catalog information.
3. Click the Item Company box and enter the item's company.
4. Click the Item Number box and enter the item's stock number.
5. Click Retrieve.
6. A list of catalogs where the item is stored displays. This includes both custom and wholesaler catalogs. To re-sort the data, click the Catalog Name and Provider headings.

### Flyer Management

Integrated eMarketing in ECinteractivePLUS lets you manage complete email campaigns to keep in touch with your customers. For more information, see [Setting Up & Using Integrated eMarketing](#).

### Uncataloged Items

Uncataloged items are items sold by Essendant but are not published in a catalog or included in a standard eContent file. Essendant also offers a Rich Content Service for dealer custom items. Using this service, Essendant maintains the product's details and images for you instead of creating a custom catalog.

Catalog Combination Indexes (CCI) are used to manage the various lists of items for which a specific customer can shop. Before it is displayed in search results, an uncataloged item must be included in a CCI. This feature lets you add uncataloged items to a CCI without having to add the item to your custom catalog.

As a result, the Essendant SmartSearch Results displays product information. You can manually add items or import a list of uncataloged items using a delimited file. Then add the uncataloged list to your custom catalog group. Doing so triggers a new CCI to be processed. Once the new CCI is processed in your database and Essendant database, the items can be included in the search results.

**Note:** You must contact Essendant before importing uncataloged items. Failure to do so results in an unsuccessful validation of the items.

## Before You Import







Once you add the item to an uncataloged item list and it is synchronized, it is considered an Essendant item. Because it is no longer recognized as a custom item, the item is removed from the ECP catalog, as well as any custom catalogs to which it has been assigned.


**Note:** If you have only one custom catalog, this does not apply to you. Go to the **Using the Uncataloged Items Page** heading.

If you have more than one custom catalog, perform the following steps:

1. Determine the custom catalogs to which the item currently belongs. To do so, use the Find Catalog by SKU function. Record all the custom catalogs for the item. You'll need this list after importing. Perform this step for each uncataloged item.
2. Import the uncataloged items. For more information, see the **Importing Uncataloged Items** heading.
3. Add the uncataloged item list to your existing custom catalog groups.
  - 3.1 Go to the Custom Catalog Group Management page and retrieve the group.
  - 3.2 In the Catalogs section, select the newly imported uncataloged item list. Be sure to also select all the custom catalogs to which the item previously belonged.
  - 3.3 When finished, click Save. When the CCI is triggered, the item is recognized as an Essendant item and is removed from the ECP catalog and any custom catalogs to which it previously belonged. Afterwards, it is available in Essendant Smart Search results.

## Using the Uncataloged Items Page

1. Click the Product Management training toolbar, and select Un-cataloged Items. The Un-Cataloged Items page opens.
2. To create a new list:
  - 2.1 Click  Add New List.
  - 2.2 Click the Catalog Name box and enter a unique name for this list.
  - 2.3 Click .
3. Click  next to a list to expand it and view items. You can then do the following:
  - Click  Add New Item to add a new item to the list. Enter the item's company and item number. Click .
  - To delete items from the list, check the box next to each item to delete. Click . At the Are You Sure prompt, click OK.

4. To merge lists:
  - 4.1 Click  Merge Selected. The Merge Un-Cataloged Lists page opens.
  - 4.2 Check the box next to each list to merge. You can also check the box at the top of this column to select all lists.
  - 4.3 In the Select the List to Merge Into section, select merge settings:
    - **Merge the Items Into a New List:** Merge all items into a new list. If you select this option, click the box and enter the name of the new list.
    - **Merge the Items Into This List:** Merge all items into an existing list. If you select this option, click the drop-down menu and select the list into which to merge all items.
5. Click Go.


### Importing Uncataloged Items

When importing, limit the uncataloged item list to 1000 items or less.

---

**Note:** If you have more than one custom catalog, you must complete the steps under the **Before You Import** heading before proceeding.


---

1. From the Un-Cataloged Items page, click  Import From File. The Import Wizard page opens.
  - 1.1 Click the List Name box and enter a unique name for this imported list.
  - 1.2 In the Field Delimiter section, specify how the uncataloged items are separated. You can choose from Comma, Space, Tab, Pipe, or Fixed Company Length. If you select the Fixed Company Length option, click the corresponding box and enter the length. This box defaults to 3.





- 1.3 Import a list of uncataloged items from one or more files of the same delimited format, or manually enter the uncataloged item numbers one at a time. Limit the uncataloged item list to 1000 items or less.
  - **Import From File:** Check the Import Items From File box. Click Browse. Scroll to the location on your hard drive where the file is stored, select it, and click Open. To add another file, click Add and browse again. You can add as many files as needed. They must be separated with the delimiter you selected in **Step 1.2**. Check the My File Has a Header Row box to exclude column headers from the import.
  - **Manually Enter Items:** Click the Manually Enter Items box and enter each uncataloged item. Use the field delimiter you selected in **Step 1.2** between the company prefix and the item number. Enter each item on a separate line.
- 1.4 Click Next. The uncataloged item information opens. You can do the following:
  - Click the column headers to sort the displayed information.
  - To limit the displayed information, click a box and enter information by which to limit. Then, choose a filter.
  - Click next to an item to remove it from the list.
- 1.5 You can also validate items against your back-office system *and* against your Enhanced Content Provider's system. Validating ensures that items are available to be purchased on the front-end site. To proceed without validating, click Next and go to **Step 1.7**.

To validate items, click Validate. A progress bar displays as the items are processed. When complete, click the Back-office Valid and ECP Valid drop-down menu, and select No to view all invalid items. The number of invalid items also displays in the lower-right corner of this page.

Click  to remove items. When finished, click Next.

- 1.6 Click Finish to import the uncataloged items into the database. The Time Elapsed message displays as the items are imported.

When the process is complete, the Un-Cataloged Items page opens again.


2. Add the uncataloged item list to an existing custom catalog group. You can also add a new group.
  - 2.1 Click the Product Management training toolbar, and select Custom Catalog Group Management. The Custom Catalog Group Management page opens.
  - 2.2 Click  next to the group to change.
  - 2.3 In the Catalogs section, check the box next to the new uncataloged item list. If an item belongs to more than one custom catalog, select all custom catalogs to which the item previously belonged. For more information, refer back to the Before You Import heading.
  - 2.4 Click . The system generates the CCI overnight. Items are available in Essendant Smart Search results the next day.





## Consumer Config

This section of your administrative website includes shipping options, customer settings, favorite lists, and rewards.

### Shipping Management

You can create, edit, and delete shipping options that are available to your customers at checkout. All shipping options you add must also exist in your back-office business system.

1. Click the Consumer Config training toolbar, and select Shipping Management. The Shipping Management page opens.
2. To add a new shipping item:
  - 2.1 Click  Add New Shipping Item.
  - 2.2 Click the Description box and enter a name for this shipping option. This name displays on the admin Checkout Settings page. It also displays on the front-end Checkout page for customers who can use this shipping option.
  - 2.3 Click the Item Company box, and enter the name of the shipping company. This company must exist in your back-office business system.
  - 2.4 Click the Item Number box and enter the shipping item number. This item number must exist in your back-office business system.
  - 2.5 Click the Flat Rate box and enter the flat rate you charge for shipping. For example, if you charge a flat rate of \$4.95 for shipping, you would enter 4.95. The maximum rate you can charge is \$99.99.



- 2.6 Click the Add'l % box and enter a number between 0 and 99. Use the %%% format. The number is applied as a percentage.
- 2.7 Click the Free Ship Min box and enter the amount an order must meet to receive free shipping. Use the ### format.
- 2.8 Click  .
3. To edit existing shipping items:
  - 3.1 Click  next to the shipping item to change.
  - 3.2 Enter the new information over the existing information.
  - 3.3 Click  .
4. To delete shipping items:
  - 4.1 Click  next to the shipping item to remove.
  - 4.2 At the Delete This Shipping Item prompt, click OK.


## Alternate/Substitutes

You can control how ECinteractivePLUS displays alternate and substitute items that are added to a shopper's cart. For more information, see [Alternates and Substitutes](#).

## Checkout




Use the Managing Checkout Settings page to create and edit checkout settings. Each checkout setting is a collection of checkout options. Once you create and name settings, you can assign them to your shoppers. Checkout settings let you allow or deny access to specific features such as the ability to place credit cards orders and select a different shipping address.

1. Click the Consumer Config training toolbar and select Checkout. The Managing Checkout Settings page opens.
2. To add a new setting:
  - 2.1 Click  Add New. The Create or Edit Checkout Settings page opens.
  - 2.2 Click the Setting Name box, and enter a new name for this settings group.
  - 2.3 In the Shipping Options section, check the box next to each shipping option to make available for shoppers.
  - 2.4 Check the box next to each feature to enable it.
  - 2.5 When finished, click Save.
3. To edit existing settings:
  - 3.1 Click  next to the settings group to change.
  - 3.2 Check or clear each box, as needed.
  - 3.3 When finished, click Update.

4. To delete settings:
  - 4.1 Click  next to the settings group to delete.
  - 4.2 At the Are You Sure prompt, click OK.




## Communication

Use the Managing Communication Settings page to set up communication options that control how customers receive communications. Once you create and name these settings, you can assign them to your shoppers.

1. Click the Consumer Config training toolbar and select Communication. The Managing Checkout Settings page opens.
2. To add a new setting:
  - 2.1 Click  Add New. The Create or Edit Communication Settings page opens.
  - 2.2 Click the Setting Name box and enter a new name for this settings group.
  - 2.3 Check the box next to each feature to enable it. You can enable or disable the following:
    - Enable Order Confirmation Emails
    - Enable Order Confirmation Emails to CC Address
    - Use Department and Attention Info for the Subject Field in All Email Communications
  - 2.4 Click the CC Email Confirmation Address box and enter the email addresses that should be copied on all order confirmation emails. Separate each email address with a comma. You must check the Enable Order Confirmation Emails to CC Address box to use this feature.
  - 2.5 Click the Text Value to Place Between Department and Attention When Used for Subject Line of Emails box and enter any information to separate the department and attention information in the subject line of emails. For example, you could type > to separate the department and attention by >, or you could add the word Site.
  - 2.6 When finished, click Save.
3. To edit an existing settings group:
  - 3.1 Click  next to the settings group to change.
  - 3.2 Adjust the settings, as needed.
  - 3.3 When finished, click Update.
4. To delete a settings group:
  - 4.1 Click  next to the settings group to change.
  - 4.2 At the Are You Sure prompt, click OK.


## Feature



Use the Managing Feature Settings page to create and edit feature settings. Each feature setting is a collection of site features. Once you create and name settings, you can assign them to your shoppers. Feature settings let you allow or deny access, such as the ability to view order history or view budget information.

1. Click the Consumer Config training toolbar and select Feature. The Feature Settings page opens.
2. To add a new settings group:
  - 2.1 Click  Add New. The Create or Edit Feature Settings page opens. This page is divided into two tabs: General and Enhanced Content.
  - 2.2 Click the Setting Name box, and enter a new name for this setting.
  - 2.3 Check the box next to each feature to enable it.
  - 2.4 Click the Enhanced Content tab, and select the following options:
    - **Enable Enhanced Content:** Select Enable to enable enhanced content for your front-end site. If you select Disable, the remaining options do not apply.
    - **Choose Content for Quick Search:** Select ECinteractive Standard Content to display standard content in Quick Search, or select Enhanced Content to display enhanced content in Quick Search.
    - **Choose Content for Advanced Search:** Select ECinteractive Standard Content to display standard content in Advanced Search, or select Enhanced Content to display enhanced content in Advanced Search. You can also select Not Display Advanced Search to not allow shoppers to use the Advanced Search feature at all.
  - 2.5 When finished, click Save.
3. To edit an existing settings group:
  - 3.1 Click  next to the settings group to change.
  - 3.2 Adjust the settings in the General and Enhanced Content tabs, as needed.
  - 3.3 When finished, click Update.
4. To delete a settings group:
  - 4.1 Click  next to the settings group to delete.
  - 4.2 At the Are You Sure prompt, click OK.

## Marketing



Use the Managing Marketing Settings page to create marketing settings. Each marketing setting is a collection of parameters that control what marketing information displays. Once you create and name settings, you can assign them to your shoppers. Marketing settings let you allow or deny access to certain features, such as web specials or point rewards.


1. Click the Consumer Config training toolbar and select Marketing. The Managing Marketing Settings page opens.
2. To add a new settings group:
  - 2.1 Click  Add New. The Create or Edit Marketing Settings page opens.
  - 2.2 Click the Setting Name box and enter a new name for this settings group.
  - 2.3 Check the box next to each feature to enable it.

- 2.4 Click the Rewards Program drop-down menu and select a rewards program. You can also select No Rewards Program.
- 2.5 Click Save.
3. To edit an existing settings group:
  - 3.1 Click  next to the settings group to change.
  - 3.2 Adjust the settings, as needed.
  - 3.3 When finished, click Update.
4. To delete a settings group:
  - 4.1 Click  next to the settings group to delete.
  - 4.2 At the Are You Sure prompt, click OK.

## Price

Use the Managing Price Settings page to create price settings. Each price setting is a collection of parameter settings that control how prices display. Once you create and name settings, you can assign them to your shoppers.

1. Click the Consumer Config training toolbar and select Price. The Managing Price Settings page opens.
2. To add a new settings group:
  - 2.1 Click  Add New. The Create or Edit Price Settings page opens.
  - 2.2 Click the Setting Name box and enter a new name for this settings group.
  - 2.3 Check the box next to each feature to enable it.
  - 2.4 Click the Number of Days to Retain Carted Item's Price box and specify how many days item prices are retained for carted or saved orders at the customer level. Normally, saved or open orders are re-priced accordingly upon checkout. This ensures that if prices are updated, the updated prices are reflected. However, if you enter a number of days in this box, the item's original price is retained for the number of days you specify. For example, if you set this box to three days, item prices for carted or saved orders are retained for up to three days. After the fourth day, all item prices are recalculated.
  - 2.5 Adjust the settings in the Enhanced Content and SPR Savings/Discount tabs, as needed.
  - 2.6 Click Save.
3. To edit an existing settings group:
  - 3.1 Click  next to the settings group to change.
  - 3.2 Adjust the settings in the General, Enhanced Content, and SPR Savings/Discount tabs.
  - 3.3 When finished, click Update.

4. To delete a settings group:
  - 4.1 Click  next to the settings group to delete.
  - 4.2 At the Are You Sure prompt, click OK.

## Favorites Lists/Favorite Item Mgmt

You can create favorite lists for your shoppers so they can easily access the products they frequently purchase. In addition to setting up favorite lists that can be viewed by all your shoppers, you can assign favorite lists to specific accounts and departments. Shoppers can also create and maintain their own favorite lists on the front-end site. For more information, see [Favorite Items](#).

## Rewards

With your administrative site, you can create your own incentive programs that allow shoppers to earn reward points for each dollar spent. Shoppers can then use accumulated points to purchase additional products. You have complete control of the rewards program, including which accounts are eligible, the ratio of dollars spent to points earned, and the point value of reward items. You can also set up multiple rewards programs and assign different programs to different customer groups. For more information, see [Rewards](#).

## Consumer Admin

This section of your administrative website helps you manage your customers including adding new shoppers, adding approval groups, adding guest shoppers, assigning favorite lists, and making mass changes.

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**Note:** The first option under the Consumer Admin training toolbar is Account Management. You use this page to add customer account numbers. For more information, refer back to the **Account Management** heading.

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## Customer Records

Click the Consumer Admin training toolbar, and select Customer Maintenance. The Customer Records page opens.

## 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:  ▼

Go Clear

### Recent Site Customers

GREG HARRISON
---------------

### Customer Records

Add Customer
 Edit Guest Customer

Total Users:	1
Users Currently Online:	0
Pending Registration	0

### Recently Accessed Customer Records:

### Site Sales

Orders Placed Today:	0
Current Month Sales:	\$0.00
Previous Month Sales:	\$0.00

The page is divided into four sections: Search, Recent Site Customers, Customer Records, and Site Sales.

**Note:** You can 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. To move to the Current Site link at the top of the page, type Alt + S.

## Search

Searching for customers helps you quickly retrieve the specific records you need.

**Note:** You can also retrieve a list of all customers without setting limits, if needed. To do so, click Go without entering anything in the search boxes.

1. Click the Search Category drop-down menu and select the search method. For example, you can search by user name. The method you select is retained for future searches until you change it later.
2. Click the Category Keyword box and enter all or part of your search criteria. You can also click the Account and Department drop-down menus and select a specific account or department for which to search.
3. Click Go. The Customer Search Results page opens. This page is sorted by account number by default.
4. Click next to an account to expand the user list. Click to collapse it again.
5. You can use the blank boxes at the top of each column to filter the information that displays, as needed. You can also click the column headers to sort information in ascending or descending order.
6. Click next to a customer to open the Customer View page. For more information, see the **Customer View** heading.
7. Click the Log link to view a customer report. For more information, see the **Customer Log** heading.



### Recent Site Customers

The Recent Site Customers section displays the last 10 customers who have logged into your site. The most recent customer displays at the top of the list. This is helpful if a customer calls about an issue. Click the customer's name to view and edit customer information. The Customer View page opens. For more information, see the **Customer View** heading.

### Customer Records

The Customer Records section displays the total number of customers in your system, the number of customers who are currently online, and the number of customers who are pending registration. The last five customers you've accessed on the admin site also display. You can click a customer name to access the Customer view page. For more information, see the **Customer View** heading.

You can also add a customer and edit the guest customer. For more information, see the headings **Add Customer**.

### Site Sales

The Site Sales section displays the number of orders placed today, the total sales for the current month, and the total sales for previous months.

### Customer Maintenance

Click the Consumer Admin training toolbar, and select Customer Maintenance. The Customer Records page opens. Customer maintenance includes adding customers, editing customers, and copying customers.

### Customer View

The Customer View page opens when you select a customer, or when you click Edit Guest Customer on the Customer Records page.

**Customer View: jessdoc**

Status:  Active  Inactive View Log Add Customer Copy - New Desc

Customer Information	
First Name	Jess
Last Name	Doc
Phone Number	--
Phone Extension	
User Name	jessdoc
Email	jessdoc@email.com
Email Format	HTML
HP Rewards ID	No
Confirmation Email	No
Opted Out of Flyers	No

Account Information	
Default Account   Department   Attention	
10143 - JUANES PLACE	
- JUANES PLACE	
Not Set	
Customer is authorized for All departments on website	

CCI	
AAA - sangya	
Status	Active
POP Status	Available

Quantity On Hand	
Quantity On Hand Text	In stock! 1,000
Quantity Not On Hand Text	Next Day Delivery (ifless otherwise specified)

Recurring Orders	
Enable Recurring Orders	Yes
Discount Percentage Per Item	10.00%
Apply Discount Qualifications	All Orders
Number of Days for Advance Email Notification	10

Location	
GI	1
HW	1
Printer	01

Accelerate Information	
Username	
Password	

User Group Settings	
Activity (Custom)	
Checkout (Custom)	
Communication (Custom)	
Feature (Custom)	
Marketing (Custom)	
Price (Custom)	

You can do the following from this page:

- Select the Active option or the Inactive option to change the customer’s status.
- Click View Customer Log to view the customer log. For more information, see the **Customer Log** heading.
- Click Add Customer to add a new customer.
- Click Copy to create a new customer that uses the same settings as an existing customer. For more information, see the heading **Copy Customers**.
- Click next to each section to edit the settings for that section. For example, to change customer information, click next to Customer Information.
- Click or in the Account Information section to view additional account information for this customer.

- Click next to each settings group in the User Group Settings section to view the settings assigned to this customer.
- Click next to Approval Group Membership to view the settings for the approval group to which the customer is assigned. For more information, see the **Approval Management** heading.
- Click Add New Account to add a new account. For more information, refer back to the **Account Management** heading.
- Click Authorize Credit Cards to authorize credit cards for this customer.
- Click Change Customer Password to change the customer’s password.
- Click Reset Password to reset the customer’s password.

## Add Customers


Adding customers is a three-step process. First, you must add the customer account to your back-office business system. Then, you must add the accounts to your admin site. Lastly, you add the shoppers who can purchase under that account to your site.

1. From the Customer Records or Customer View page, click Add Customer. The New Customer page opens.
2. Check the Add Another Customer When Finished box to add a different customer after the first customer has been added.

3. Complete each page. You must complete the Info, Acct, and Dept pages. All other pages are optional. If you click Finish on the Dept page, this customer uses the guest user settings for catalogs, item substitutes, checkout, communications, feature, marketing, and price. Click Next and Previous to move between pages.
4. When finished, click Finish.


## Copy Customers

The Copy feature lets you add new customers using another customer's settings as the default for the new record.

1. Retrieve the customer to copy.
2. From the Customer View page, click  Copy. The Copy Customer page opens.
3. Check the Copy Another Customer When Finished box to copy another customer when finished adding this one.
4. Click each box and enter the new customer's information. Boxes marked with asterisk are required.
5. Check the Send Confirmation Email box to send an email to the customer when this account has been successfully created.
6. When finished, click Save.

## Customer Log

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

1. From the Customer View page, click  View Log. You can also click the Log link on the Customer Search Results page. The Customer Log page opens.

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: Ginger Snapps; Username: becky				
update	cci	catalog group is changed to cco: qa_catalog_1 .	3/28/2014 11:32:49 AM	bmanion
update	cci	contract/LL is changed.	3/28/2014 11:08:46 AM	bmanion
Update	Setting	Customer marketing setting is changed.	8/12/2013 10:08:43 AM	bmanion
Create	Department	Department 11559 - Firefighter Jeff Manion was added.	10/7/2011 11:15:55 AM	bmanion
delete	department	Department 11559 - Firefighter Jeff Manion was removed.	10/7/2011 11:07:52 AM	bmanion
Update	Setting	Customer marketing setting is changed.	7/13/2010 5:28:00 PM	bmanion
Update	Customer	Added to domain Becky's .	7/13/2010 5:03:17 PM	bmanion

2. Use the Logged Action, Logged Object, Comments, Modified, and By boxes to limit the information that displays.
3. Click each column heading to sort the information in ascending or descending order.
4. When finished, click Dashboard to return to the Customer Records page, or click Customer View to return to the Customer View page.

## Approval Management: Approval Groups

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 must set up approval groups.

1. Click the Consumer Admin training toolbar, Approval Management, and select Approval Groups. The Approval Management page opens.
2. To view approval groups by customer, click the Search for Group By Customer drop-down menu and select a customer for which to view approval groups.
3. Click next to a group name to view customer group and department information. Department groups display the department number and name. Customer groups display the customer name, user name, and email address.

Approval Group Management					
Search for Group by Customer: <span>[All Groups]</span>					
<a href="#">Add New Approval Group</a> <a href="#">Refresh</a>					
		Account	Description	Created	Group Type
		777200 - soeing corp.	707200	6/20/2010 6:09:35 AM	department
		777200 - soeing corp.	772200	6/20/2010 6:40:35 AM	department
		11555 - Firefighter Jeff Manton	approvers	1/4/2008 11:22:45 AM	top

Customer Name	User Name	Email
gary lanson	garyl	gary@net.endeavor.com
Ginger Snapps	becky	bmanion@eci2.com
doc writer	docwriter1	customer@doesnothaveemail.com

4. Click next to an approval group to change the settings for that group. The Approval Group View page opens. To view a group's detail, click the group in the Approval Chain section.
5. Click next to an approval group to delete it. At the Are You Sure prompt, click OK.

displays next to approval groups that cannot be deleted. There are two reasons why a group cannot be deleted:

- Orders are awaiting approval for this group.
- There are approval groups below this group in the group hierarchy. You must manually delete these groups in the correct sequence, from bottom to top.

## Add Approval Groups

You can add Top Level, Customer, and Department approval groups. Top Level groups also give you the ability to add multiple Top Level groups per account. This can be helpful for certain approval groups. For example, a school district could act as the main account, and all the individual schools within the district could act as departments. Each school has an approval chain with a top approver unique to each school. Orders created by the specific school can now be directed to its top approver.

1. From the Approval Group Management page or the Approval Group View page, click Add New Approval Group.
2. Click the Account drop-down menu and select the account to which to add this approval group.
3. Click the Description box and enter a descriptive name for this approval group.


4. Click the Email CC Address on Approval Emails box and enter email addresses that are copied on approval emails.
5. Check the Email Approver on Approved Orders box to send an email to the approver when they approve an order.
6. In the Denial Reason section, choose from the following:
  - **Required (Default):** The approver must enter a reason for denying the order.
  - **Optional:** The approver can enter a reason for denying the order, if needed. They are not required to enter a reason.
  - **Not Required:** The approver does not need to enter a reason for denying the order.
7. Click Next. The Group type page opens.
8. In the Approval Group Type section, choose from the following:
  - **Top Level Approval Group:** This group is at the top of the approval chain for the customer's account and has final authority in the approval process. When you create top level approval groups, you cannot set limits. The top level group acts as the parent group, under which you assign customer and department groups. You can only create one top level approval group for each chain.
  - **Customer Level Approval Group or Department Level Approval Group:** These groups are beneath the top level approval group. Since they are attached to a top level approval group, they are referred to as child groups. These groups' approval limits are applied to any customer purchasing products for the departments assigned to these groups. You can set order dollar limits, line item limits, and over budget limits. These types of approval groups are useful if you have numerous customers within a department. You can create as many customer and department approval groups, as needed.
9. Click Next. The Members page opens.
10. Click the drop-down menu to assign members to this group. You can also click Use Grid to Select Options to select members from a list. If you are creating a Top Level Approval group, go to **Step 15**.
11. Click Next. The Limits page opens.
12. Set limits for this approval group, as needed.
13. Click Next. The Approvers page opens.
14. Click the Available Approvers drop-down menu and select the approver for this group.

---

**Note:** Approvers can be added to as many groups as needed. This is useful when one approver is required to handle orders for multiple departments.

---

15. Click Finish.
16. After you set up groups, you can view approval chains. You can use any of the methods below to access approval chains and make changes:
  - Click the Consumer Admin training toolbar, Approval Management, and select Approval Chains. Select the account, and then click the approval group to view.

- Click Customer Settings from the menu to the left, and select Approval Chains. Select the account and click the approval group to view.
- Click the Consumer Admin training toolbar, Approval Management, and select Approval Groups. Click  next to the group to view. The Approval Group View page opens and displays approval chain information.



## Account Administrators (Domain Management)


This tool helps streamline business processes by giving more control to an account administrator on the front-end site. You select the options account administrators can access on the Domain Management page. This includes the ability to edit site news, manage favorite lists, group settings, approval chains, global and custom catalogs, contracts, and laundry lists. All permissions granted to the account administrator are maintained by you. Since the options remain unavailable to the account administrator until you activate them, this process can be done in a series of steps, rather than all at once.

This feature differs, depending on the accounts assigned to a domain:


- If more than one account is assigned to a domain, all assigned customers have access to all accounts within the domain. Therefore, each domain should be specific to each account administrator. You can use the Copy Domain feature to help you add additional domains.
- If one account is assigned to a domain, but the customer associated with the domain has more than one shopping account assigned in their customer profile, the customer can view and modify all users for all shopping accounts as an account administrator. However, they can only add customers to the single account associated with the domain. If the account administrator also needs the ability to add customers to any of their assigned shopping accounts, assigned shopping accounts must be added to the domain.

### Adding a Domain

1. Click the Consumer Admin training toolbar, and select Domain Management. The Domain Administration page opens and lists active and inactive domains.
2. Click  Add New Domain. The Create New Domain page opens.
3. Click the Domain Name box and enter a unique name.
4. Click Next.
5. Choose the account(s) to assign to this domain. There are two methods by which to select accounts:
  - Click the Account Name drop-down menu and select the account. Click Add. The account is added to the list. To choose another, click the drop-down menu and select the next account. Click Add. You can choose as many accounts as needed. Click Next.
  - Click the Use Grid to Select Options link to use the grid to select options. Click  next to an account to add it to the domain.

To remove an account from the domain, click  next to the account. It is removed from the account list.

6. To set an account as the default for this domain, select the Default option next to the account. The default account is used when adding new customers. The Add Customer function defaults to the identified account, with one exception: If the domain has more than one account, you can click the drop-down menu to select from a list of available accounts.
7. Click Next.
8. Click the Customer Name drop-down menu and select the account administrator. Click Add. The name is added to the list. You can also click Use Grid to Select Options to select administrators from a list.

Click  to delete an administrator from the list.

9. Click Next.
10. Set preferences. Click each drop-down menu and select Yes or No.

**Create New Domain - Doc Domain:**

Step: (4/16)

Select preferences for this domain.

Allow the creation of other Account Administrators for this domain?

Allow Account Administrators to add new customers to this domain?

Allow the changing of Consumer News for assigned accounts?

Allow the management and assignment of Favorites Lists for assigned accounts?

Allow the management of Approval Chains for assigned accounts?

Allow the changing of Quantity on Hand settings in customer management?

Allow the changing of Recurring Orders settings in customer management?

Allow selection of Contract/Laundry Lists?

Allow selection of Global Catalogs?

Allow selection of Custom Catalogs?

11. Click Next.

---

**Note:** While you can enable or disable certain features, account administrators always have access to the Customer Maintenance feature.

---

12. Click the GL, Inv, and Printer boxes and enter the default G/L location, inventory location, and printer for this domain. Then, click the corresponding drop-down menu and select Editable, Read-Only, or Hidden.



13. Click Next.
14. Click the Acseccelerate Username and Acseccelerate Password boxes and enter Acseccelerate login information, if needed. Then, click the drop-down menu next to each option and select Editable, Read-Only, or Hidden.
15. Click Next.
16. Set Contract/Laundry Lists options.
  - 16.1 Click the List Name drop-down menu and select a contract or laundry list to assign to this domain. Click Add.
  - 16.2 Select the Default option next to a contract/laundry list to set it as the default for this domain.
17. Click Next.
18. Set Global Catalog options.
  - 18.1 Click the Global Catalog drop-down menu and select a global catalog to assign to this domain. Click Add.
  - 18.2 Select the Default option next to a global catalog to set it as the default for this domain.
19. Click Next.
20. Set Custom Catalog options.
  - 20.1 Click the Custom Catalog drop-down menu and select a custom catalog to assign to this domain. Click Add. The global and custom catalogs assigned to each account in the domain are used as the default when adding new customers to that account.
  - 20.2 Select the Default option next to a custom catalog to set it as the default for this domain.
21. Click Next. The Alt/Sub Options page opens.
22. In the next five pages, set Alt/Sub, Checkout, Communication, Feature, Marketing, and Price settings. You can use a pre-defined settings group, or click Edit Settings to customize the settings group. Click each drop-down menu and select Editable, Read-Only, or Hidden. Click Next and Previous to move between pages.
23. On the Notes page, click the Notes drop-down menu and select Editable, Read-Only, or Hidden.
24. When finished, click Finish. The Account Administrator Domains Edit page opens with the domain's status set to inactive. The account administrator cannot access options on the front-end site until you change the status from Inactive to Active.

### **Editing a Domain**

The Account Administrator Domains Edit page lets you perform maintenance functions. This page opens when you finish adding a new domain. It also opens when you select a domain to edit on the Domain Management page.

### Account Administrator Domains: Edit

Domain Name: Doc Domain    
 Emulate    
 Status:  Active  Inactive    
 Add New Domain

Accounts, Customers & Preferences	
Accounts	
1002 - APPLIED LASER TECHNOLOGY	
10178 - TINA'S TIRE SHOP	
Customers	
Preferences	
Create New Account Administrators	Yes
Create New Customers	Yes
Edit Consumer News	Yes
Management/Assignment of Favorites Lists	Yes
Management of Approval Chains	No
Edit Quantity On Hand Setting	No
Edit Recurring Orders Settings	No
Allow Selection of Contract/Laundry Lists?	Yes
Allow Selection of Global Catalogs?	Yes
Allow Selection of Custom Catalogs?	Yes

Contract/Laundry Lists	
Account: 1002 - APPLIED LASER TECHNOLOGY	
Selected Lists	
RESTRICTIVE - +D	
Account: 10178 - TINA'S TIRE SHOP	
Selected Lists	

Global Catalog Groups	
Account: 1002 - APPLIED LASER TECHNOLOGY	
Selected Lists	
Account: 10178 - TINA'S TIRE SHOP	
Selected Lists	

Custom Catalog Groups	
Account: 1002 - APPLIED LASER TECHNOLOGY	
Selected Lists	
012714 Custom Catalog	
Account: 10178 - TINA'S TIRE SHOP	
Selected Lists	

Accellerate Information	
Username	
Password	

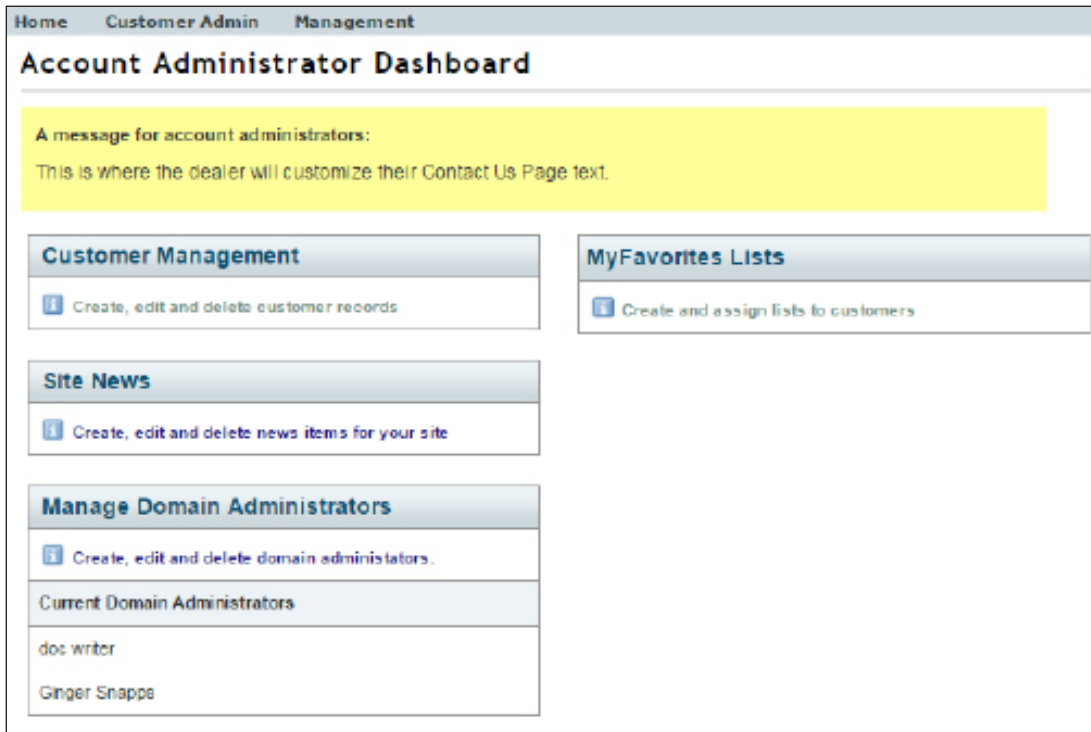
User Group Settings	
Alt/Sub: (Custom)	
Checkout: (Custom)	
Communication: (Custom)	

Location	
GL	1
Inv	1

- Click next to Domain Name to change the domain's name. Enter the new name over the existing name. Click Save.
- Click Emulate to open and view domain options from the account administrator's view. A new page opens and displays options as the account administrator sees them on the front-end site. Click each link to test your settings. When finished, click Return to Dealer View. Edit the settings, as needed.

**Note:** We strongly recommend that you use the Emulate function to view account administrator features. If you open the front-end site and log in as an account administrator to view features, close the Admin page first. Logging in to both sites simultaneously causes discrepancies between the two sites.



- Select the Active option to make the domain active, or select the Inactive option to make the domain inactive. At the Please Confirm prompt, click OK.
- Click Add New Domain to add another domain.
- Click next to each section to change the settings for this domain.
- Click next to the user group settings to view group settings in a pop-up window without leaving the Account Administrator Domains Edit page.

## Maintaining Domains on the Domain Administration Page

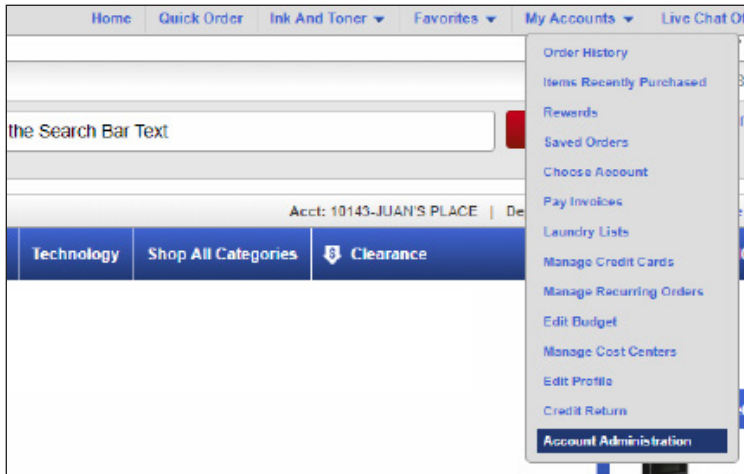
You can also maintain your domains from the Domain Administration page.

- Click or to change the domain's status. At the Please Confirm prompt, click OK.
- Click next to a domain to edit it. The Account Administrator Domains Edit page opens.
- Click next to a domain to delete it. At the Are You Sure prompt, click OK.
- Click next to a domain to copy an existing domain's setting to a new domain.
- Click next to a domain to open and view domain options from the account administrator's view. A new page opens and displays options as the account administrator sees them on the front-end site. Click Return to Dealer View to return to the Domain Administration page.

## Using Account Administrator Options on the Front-end Site

Once the options are available to the account administrator on the front-end site, the administrator can access and manipulate all the settings you have allowed.

1. The account administrator clicks the My Accounts drop-down menu and selects Account Administration. They might be prompted to log in to the front-end site.



The Account Administrator Dashboard opens and displays the same settings you viewed when emulating as the account administrator.

2. When the administrator finishes changing settings, they simply close the window to return to the front-end site.

## Edit Guest Customer

Casual visitors of your site might be hesitant to establish an account with you. In ECinteractivePLUS, visitors can simply provide their email address and a credit card to complete Guest Checkout, as long as you have enabled your guest account to use credit cards. For more information, see [Guest User Checkout and Order History](#).

## Favorites Assignment

For more information, see the **Favorites Lists/Favorite Item Mgmt** heading.

## Account News

For more information on Account News, see [Customizing Site Text and Messages](#).

## Mass Setting Management

Your shopper's experience is based on parameters you set. For example, you may allow one customer to place credit card orders while another cannot. Managing individual parameters for hundreds of customers can be overwhelming. You can use the Customer Group Settings Assignment page to effectively manage your customer settings. You can toggle features for entire accounts or departments, which affects dozens of shoppers at once.

1. Click the Consumer Admin training toolbar, and select Mass Setting Maintenance. The Customer Group Settings Assignment page opens.

- Click the Customer Filter drop-down menu and select the category by which to search. You can search by Account Code, Department Code, GL Location, Inventory Location, or Attention.
- In the corresponding box, enter the criteria by which to search. For example, if you selected Department Code in the customer Filter box, you could type Acct for accounting.
- Click Get Customer. All customers that meet the limits you set display in the Customer List box.
- Use the User Name, First Name, Last Name, Email, Account, and Department boxes to filter the customers that display, if needed.
- Click the Choose a Setting drop-down menu and select a group setting for the displayed customers.
- Click the Choose a Value drop-down menu and select the setting to use.
- When finished, click Save.
- At the Are You Sure prompt, click OK. A message displays the number of customers updated with the setting you selected.

## Customer Groups

The customer group tool is used to migrate your end users. You must complete training for this feature before you can use it.

## Parameter Maintenance

The Managing Customer Parameters page lets you view the customers that have been assigned specific parameters. Use this page to change parameters for some or all of your customers.

- Click the Consumer Admin training toolbar, and select Parameter Maintenance. The Managing Customer Parameters screen opens.
- Click the Choose A Parameter drop-down menu and select a parameter.
- Click the Choose A Value drop-down menu and select the setting for the parameter you selected.
- Click Search. The Loading Customers message displays. If any customers match the criteria you specified, they display in the Update Customers section.

**Managing Customer Parameters** [Help](#)

You can edit customer level parameters for active customers only.

Assign multiple customers to a new account/department/attention from the **Customer Account Management** page.

Get Customers

Choose a parameter:

Choose a value:

Match value?  Yes  No

Customers with **Global Catalog [SPR & United]** have been retrieved.

Update Customers

User Name	First Name	Last Name	Email	Account	Department
AMIT	Amit	Agarwal	dohotreply@ecisolutions.com	11559 - Firefighter Jeff Manion	- Blank Department
abcdcf	a	b	customer@doesnothaveemail.com	11559 - Firefighter Jeff Manion	- Blank Department
melissa	Melissa	Manion	customer@doesnothaveemail.com	11559 - Firefighter Jeff Manion	- Blank Department
office	office	supplies	office@supp.org	11559 - Firefighter Jeff Manion	- Blank Department
Vincent	Vincent	Hanson	customer@doesnothaveemail.com	4000 - ANAHEIM	- Blank Department
bodley	Bodley	Manion	customer@doesnothaveemail.com	4000 - ANAHEIM	- Blank Department
jack	jack	deniels	dshelum@ecisolutions.com	777200 - Boeing Corp.	727200 - Boeing (727200)

Apply new parameter value:

5. Use the User Name, First Name, Last Name, Email, Account, and Department boxes to filter the customers that display, if needed.
6. Click the Apply New Parameter Value drop-down menu and select the new parameter setting for the displayed customers.
7. Click Save.
8. At the Are You Sure prompt, click Yes. A message displays the number of customers updated with the new parameter setting you selected.

## Customer Account Management

The Managing Customer Accounts page lets you view the customers that have been assigned to specific accounts, departments, and attentions. Using this feature, you can mass change your customer settings without changing them one by one. For example, you can use this page to move some or all of the customers assigned to one account to a different account.

1. Click the Consumer Admin training toolbar and click Customer Account Management. The Managing Customer Accounts page opens.
2. Click the Choose an Account drop-down menu, and select the account to manage.
3. Click Search. The Loading Customers message displays. The customers associated with the account you selected display in the Update Customers section.

User Name	First Name	Last Name	Account	Acct Status	Department	Dept Status
707200	d	s	777200 - Boeing Corp.	Active	707200 - 707200	Active
logincozt	login	cozt	777200 - Boeing Corp.	Active	707200 - 707200	Active
727200	727200	727200	777200 - Boeing Corp.	Active	727200 - Boeing (727200)	Active
jack	jack	daniels	777200 - Boeing Corp.	Active	727200 - Boeing (727200)	Active
plane1	plane1	plane1	777200 - Boeing Corp.	Active	777200 - Boeing Corp.	Active
boeing	david	shellum XXXXXXXXXXXX	777200 - Boeing Corp.	Active	777200 - Boeing Corp.	Active

4. Use the User Name, First Name, Last Name, Email, Account, and Department boxes to filter the customers that display, if needed.
5. In the Apply New Default Account Value section, you can change the account, the department, and/or the attention.
  - To change the account, click the Default Account drop-down menu and select the default account to use.
  - To change the department, click the Default Department drop-down menu and select the default department to use.
  - To change the attention, click the Attention drop-down menu and select the default attention to use.

6. When finished, click Apply.
7. At the Are You Sure prompt, click OK.

## User Types


ECinteractivePLUS lets you create user type templates to apply to your shoppers. For more information, see [User Types](#).

## Site Info

This section includes information about user usage reports and the Order Management feature. You can also view login errors and a list of orphaned users in this section.

## User Usage Reports

Use the User Usage Reports page to generate a report of the activity of all of the users who fit the entered search criteria. You can export this report to an Excel spreadsheet, a tab-delimited file, or a Word document.

1. Click the Site Info training toolbar, and select User Usage Reports. The User Usage Reports page opens and displays a list of customers.
2. Use the First through Order Total LM boxes to filter the information that displays. Enter the criteria, and then select an operator. The data updates automatically.
3. Click  Excel Spreadsheet, Tab-Delimited File, or Word Document to export the report.

## Order Management

Use the Order Management page to report on order history. This page lets you view the status of all submitted orders. You can also delete orders and transfer orders to customers who belong to the same account, as well as view all scheduled recurring orders.

---

**Note:** You can only delete or transfer orders that have a status of Shopping Card or Saved Orders. You cannot transfer orders between shoppers assigned to different accounts.

---

1. Click the Site Info training toolbar, and select Order Management. The Order Management page opens.
2. Limit the orders by date range, order number, or account number. You can also choose to view recurring orders or failed orders.
  - To view all scheduled recurring orders, click View Orders in the Recurring Orders section. Go to **Step 4**.
  - To view all failed orders, click View Orders in the Failed Orders section. Go to **Step 4**.
  - To limit by date range, select the Status Date Range option and enter the beginning date in the first box and the ending date in the second box. You can also select the date from a calendar.
  - To limit by order number, select the Order Number option. Click the corresponding box and enter part or all of the order number.
  - To limit by customer account number, select the Account option. Click the Account drop-down menu and select the account.
  - Check the Limit to Procurement Purchase Orders Only box to limit the orders to only procurement purchase orders.

- Click Retrieve Orders. The page refreshes, and the orders display according to the limits you specified.

**Order Management**  
 Orders are grouped by status. Use the Order Status dropdown box to see all orders with a particular status. You can also use the grid filters and headers to sort your results. Back to Specifying Orders

**Notes:** If you want to limit to a range of numbers, you must include a space between the two numbers. For example, to limit to account numbers 1005 through 1099, type **1005 1099** in the dropdown box under the Account heading, press **↕**, and select **Between**.

To transfer orders, set the Order Status dropdown to **Open Order** or **Saved by Customer**, select an order you want to transfer and a customer to whom you want order to be transferred, and press **Transfer**. Upon successful order transfer, a notification email will be sent to the new order owner if a saved email is available.

To resubmit failed orders, set the Order Status dropdown to **Error Occurred** or **Processing Failure**, select an order you want to resubmit, and press **Reset**.

Orders with a status date between 8/14/2012 and 11/3/2015 have been retrieved

Order Status: All Status ▼

		First Name	Last Name	Email	Order Number	Status	Acct	Dept	Status Date
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
						Saved Orders	11559	11559	9/27/2013 11:54 AM

- Set additional limits, if needed. After each limit you set, the page refreshes to display the new records.
  - Click the Order Status drop-down menu and select the type of orders on which to report.
  - Use the First Name, Last Name, Email, Order Number, Status, Acct, Dept, and Status Date boxes to set additional limits. Click each box and enter the criteria by which to limit. Then, select an operator.
- Click next to an order to view order details. The system displays the line items on the order along with the statuses the order has been through.
- Click next to an order to delete it. At the Are You Sure prompt, click OK. The order is removed from the list and no longer displays on the shopper's page.
- To transfer an order:
  - Click next to the order to transfer. The shopper list opens.
  - Check the box next to the customer to whom to transfer the order.
  - Click . At the Are You Sure prompt, click OK. The order is set to the Saved Order status and is assigned to the shopper you specified. An email containing the order's status, previous order user, and a link to the order is sent to the new shopper.


## Login Errors

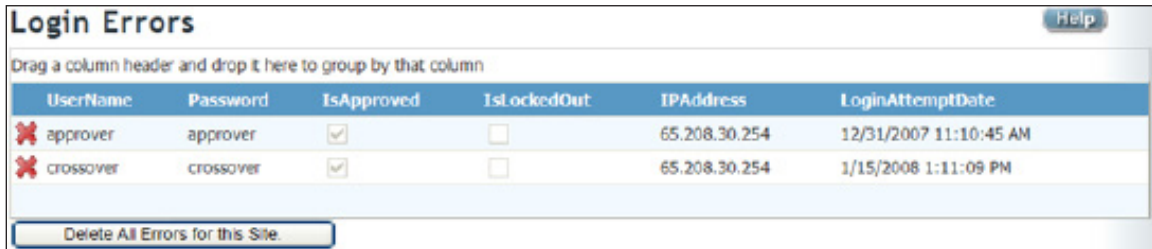
Use the Login Errors page to view a report of login errors. The report is created automatically when you open the page. The Login Errors page displays a list of shopper IDs and passwords used when attempting to log into the site. Since the system does not display passwords, this list displays the combinations attempted. Either the username and/or password was incorrect.



You can also use this page to quickly determine the shoppers who have been locked out due to multiple attempts and failures. If an account is locked, click the Consumer Admin training toolbar and select Customer Maintenance. Retrieve the account and click to unlock the shopper.



You can delete a single error or delete all the errors for the site. You can sort the list by any of the categories listed by clicking it. For example, to list the names in alphabetical order, click Username. To list them in reverse alphabetical order, click Username again.

1. Click the Site Info training toolbar, and select Login Errors.
2. To delete a single error, click  next to the error to delete.




UserName	Password	IsApproved	IsLockedOut	IPAddress	LoginAttemptDate
 approver	approver	<input checked="" type="checkbox"/>	<input type="checkbox"/>	65.208.30.254	12/31/2007 11:10:45 AM
 crossover	crossover	<input checked="" type="checkbox"/>	<input type="checkbox"/>	65.208.30.254	1/15/2008 1:11:09 PM

3. At the Delete This Menu Item prompt, click OK.
4. To delete every error in the report, click Delete All Errors for this Site.

## Orphaned Users

The Orphaned Users page displays a list of guest users who began the process of creating an account using the Register Me feature on the Home page but did not complete the process. They are listed along with an email address so you can contact them.

1. Click the Site Info training toolbar, and select Orphaned Users. The Users Without Customer Associations page opens.
2. Click  next to an orphaned user to delete it.
3. At the Delete This Connection prompt, click OK. The orphaned user is removed from the system.

## External Partner Log

The External Partner Log page displays external partner item and posting detail for XML ordering and procurement systems, including Jump Technologies (JumpTech). The log information is grouped so you can easily identify the chain of actions involved in a single process.

1. Click the Site Info training toolbar, and select External Partner Log. The External Partner Log page opens.
2. Since this page can become cluttered with information, you can set limits using each of the following columns.
  - **Site Name:** The name of the site to which the external partner's items have been added.
  - **Partner:** The name of the external partner where the items originated.
  - **User:** The name of user who loaded the external partner's items to the system. This user should have a valid user name and password to log into the system.
  - **Dept:** The department information to which the items have been posted.

- **Status:** The status of the process. Possible statuses include: Adding Items to Temp Cart Failed, Adding Items to Temp Cart Succeeded, Adding Items to Cart Failed, and Adding Items to Cart Succeeded.
- **Created Date:** The date and time when the process began.

Click the box by which to limit and enter the information. Then, click and select the operator. For example, you could select Contains.

3. Click next to a transaction to view additional log step detail. All steps logged from a single transaction display. The following details are included:
  - **Message:** The detailed text describing each step logged during the process.
  - **DateTime:** The date and time when the step was logged.
4. Click , if available, to view the full XML text saved for the transaction.
5. Click to hide the full XML text when finished viewing.

**External Partner Log**

This page will allow you to view the history of reading data from external partners and posting items to eCInteractive system . [Help](#)

Site Name	Partner	User	Dept	Status	Test	Created Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
QAF v11x SPR	eProcurement cXML			Partner Post Processing	<input type="checkbox"/>	10/31/2018 1:27:29 PM

Logged Steps

Message	DateTime
<input type="text"/>	<input type="text"/>
Not all orders have been invoiced. Setting the status back to Submitted for further testing.	10/31/2018 1:29:29 PM
Checking the backend system for invoices on '3856861-0' [Id='8ea34b9d-4cd9-e811-8108-005056a26df1'].	10/31/2018 1:29:29 PM
Not all orders have been invoiced. Setting the status back to Submitted for further testing.	10/31/2018 1:27:29 PM
Checking the backend system for invoices on '3856861-0' [Id='8ea34b9d-4cd9-e811-8108-005056a26df1'].	10/31/2018 1:27:29 PM
Not all orders have been invoiced. Setting the status back to Submitted for further testing.	10/31/2018 1:25:29 PM
Checking the backend system for invoices on '3856861-0' [Id='8ea34b9d-4cd9-e811-8108-005056a26df1'].	10/31/2018 1:25:29 PM
Not all orders have been invoiced. Setting the status back to Submitted for further testing.	10/31/2018 1:23:29 PM
Checking the backend system for invoices on '3856861-0' [Id='8ea34b9d-4cd9-e811-8108-005056a26df1'].	10/31/2018 1:23:28 PM
Not all orders have been invoiced. Setting the status back to Submitted for further testing.	10/31/2018 1:21:28 PM
Checking the backend system for invoices on '3856861-0' [Id='8ea34b9d-4cd9-e811-8108-005056a26df1'].	10/31/2018 1:21:28 PM

7254 items in 726 pages

6. You can also view items that have not been posted to the system and that are currently being stored in a temporary cart. These items display under the Items in Temporary Cart heading. If items are not being stored in a temporary cart, the text No Items displays. You can view the following information for temporary cart items:
  - **SKU:** The item's SKU.
  - **Quantity:** The quantity ordered of each item.

## Catalog Combination Index Management

You can assign each shopper to a global catalog group, one custom catalog group, or both from which the shopper can then purchase items on the front-end site. Since the system requires a unique item number when searching and browsing catalogs, this combination index helps the application more quickly retrieve e-content items on the shopper's page. This page lets you quickly determine which catalog combination indexes are current or waiting to be processed, the status of previous catalog combination indexes conducted for the site, or request to immediately process the catalog combination indexes for specific sites. Since the catalog combination indexing process is resource-intensive, by default this function is scheduled to run after business hours. You can also use the Wholesalers Priority Management page to specify the wholesaler's rank. By specifying a rank, you indicate the order in which the catalogs are searched.

1. Click the Site Info training toolbar, and select Catalog Comb Index Mgmt.
2. To view catalog index information, click the plus sign beside the site to view. The system displays the catalog combination index name, the last date the catalog combination was indexed, and the index status.
3. To update the catalog index immediately, click Update Now.
4. To view additional catalog index information, click Log.

## ECP CCI Log

This feature works with the Enhanced Content Provider (ECP) feature. It lets you view ECP catalog combination index (CCI) activity across all your sites.

1. Click the Site Info training toolbar, select ECP Sync Log, and select the log to view. The log opens, and the following columns display:
  - **Site Name:** Displays the name of the site to which the specific CCI record belongs.
  - **List Name:** Displays the name of the catalog combination index.
  - **Sync Status:** Displays the status of CCI synchronization. If the status is locked or has failed, you can click Requires Synchronization to mark the CCI as requiring synchronization. Once clicked, the Requires Synchronization button is replaced with the Requires Synchronization text.
  - **Last Sync Date:** Displays the last date and time the CCI was successfully synchronized.
2. Click each column to sort the information in ascending or descending order.
3. Use the boxes at the top of each column to filter the information that displays. Click each box and enter the criteria. Then, select an operator. For example, you can select Contains.
4. Click the plus sign beside the column to view additional information. The Synchronization History section opens, and the Modified Date, List ID, and Comments columns display.

## Online Sales Reports

You can use this page to generate a sales report of the users who fit the search criteria you enter. This report provides a list of orders placed online.

Click the Site Info training toolbar and select Online Sales Reports. The Online Sales Reports page opens. The information displayed on this page is updated with current figures from your back-office system every 30 minutes. For accurate reports, generate reports soon after the sales report information is updated. The time remaining until the next update displays at the top of the page.