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Customizing Site Text and Messages

You can customize all kinds of text in ECinteractive, including order limit messages (such as on hold due to over credit limit/monthly budget), credit card authorization messages (such as credit card processing/approved/declined/other error), automated email messages, and more.

For many pages, the WYSIWYG (What You See Is What You Get) Text Editor gives you a user-friendly way to use HTML formatting in your Home, About, Contact Us, Privacy Policy, Account News pages, and more. You can format the messages with fonts, color, bold and italic, images that you’ve uploaded, and even links to flyers you’ve uploaded or links to specific pages, external sites, or email addresses.

Using Text Editor

You can use the HTML-Capable, WYSIWYG Text Editor to create blocks of text. Some custom text could be fairly permanent, like your About Us, Contact us, Home, Login, and Privacy Policy pages, Order Errors, and possibly Scheduled Maintenance for weekdays and/or weekends.

You may also create other text blocks to be used and updated more frequently. In Account-specific News, you might highlight seasonal sales, discounts, or information about their account or sales representative.

Note: To insert images, you must first upload the files (GIF, JPG, JPEG, PNG, or BMP files and so on) in Site Info > Image Management. For detailed instructions, see your online help.

1. On the left navigation menu, click Site Text and select Text Editor.

2. In the Select Text drop-down box, you can accept the default <New Text> or select an existing text record you’ve created.

3. In Text Description, enter the title to use. This title displays in the drop-down menu when you assign this text block record to a specific page or message in Site Text Assignment.

4. In the HTML Capable tab, you can enter text and use buttons to paste content copied from Microsoft Word; use boldface, italics, bullets, numbered lists, font size, Web links, email links, date and time stamps, images; and so on. For more information, click the Help (F1) button.

5. (Optional) You can use the Plain Text tab to view what a message may look like to a reader who receives it in an email, if their email client does not allow HTML.

6. (Optional) To view the HTML code, click at the bottom of the text area, make changes as needed, and then return to WYSIWYG by clicking .

continue to next page
7. To save your work, click the Save button.
8. (Optional) You can use the Cancel button, and the system does not save your changes.
9. (Optional) You can use the Delete button to delete the entire text block.
10. (Optional) You can use the Copy button to create a copy of the text block you've created, and use it for a new text block, entering a different Text Description. This could be useful to create Account News for several customers with slightly different information.

Assigning Site Text

To navigate to the Site Text Assignment tool, click Site Text and select Site Text Assignment on the left navigation menu. You can see several tabs where you can customize what your shoppers can see.

Site Pages

You can assign text blocks you’ve created in the Text Editor to your Shopping site’s default pages, including About Us, Contact Us, Home, Inactive Account Dept, Login, and Privacy Policy.

Note: To use the Site Pages tab, you should first enter new text and format using the Text Editor.

1. Click the Site Pages tab.
2. To view what is currently assigned in a page’s Text Field, click the corresponding button.
3. To change the assigned text, click for the Text Field to assign.
4. Under Text Description, click the down arrow and click the name to assign.
5. To cancel your changes, click . To keep your changes, click .

continue to next page
Customizing Site Text and Messages

Conversion Text
You can customize the message that displays when you first migrate a customer from a legacy system that accepted a shorter password than ECinteractivePLUS requires.

**Note:** To customize Conversion Text, first enter new text using the Text Editor.

1. Click the Conversion Text tab.

2. To view what is currently assigned, click ![Info](image). Assigned text is shown below:

<table>
<thead>
<tr>
<th>Text Field</th>
<th>Text Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login Requirement Not Met</td>
<td>(Default Text)</td>
</tr>
</tbody>
</table>

   **Assigned Text:**
   Our new ecommerce platform has a higher level of security than that of our previous one, and unfortunately your profile on the previous system does not meet these requirements due to the following reason: the password is invalid. Please provide a password that is at least 6 characters long.

3. To change the assigned text, click ![Edit](image).

4. Under Text Description, click the down arrow and click the name to assign.

5. To cancel your changes, click ![Back](image). To keep your changes, click ![Forward](image).

Account Admin News
When your Customer Account Administrators log in to their Account Management Dashboard, it does not display the Account Admin News box by default. You can customize the message that displays.

**Note:** To customize Account Admin News, first enter new text using the Text Editor.

1. Click the Account Admin News tab.

2. To view what is currently assigned, click ![Info](image). Assigned text is shown below:

<table>
<thead>
<tr>
<th>Text Field</th>
<th>Text Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Admin News</td>
<td>Default Text</td>
</tr>
</tbody>
</table>

   **Assigned Text:**
   When the default is selected, Account Administrator news is not displayed.

3. To change the assigned text, click ![Edit](image).

4. Under Text Description, click the down arrow and click the name to assign.

5. To cancel your changes, click ![Back](image). To keep your changes, click ![Forward](image).
Checkout Text
You can customize several messages that display during checkout or credit card processing.

**Note:** To customize Checkout Text, first enter new text using the Text Editor. However, HTML formatting is not used for Checkout Messages.

1. Click the Checkout Text tab.

2. To view what is currently assigned, click ![View Current Assignment](image1). Assigned text is shown below:

<table>
<thead>
<tr>
<th>Text Field</th>
<th>Text Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC Approved</td>
<td><img src="image2" alt="Default Text" /></td>
</tr>
<tr>
<td>CC Declined</td>
<td><img src="image3" alt="Default Text" /></td>
</tr>
<tr>
<td>CC Other Error</td>
<td><img src="image4" alt="Default Text" /></td>
</tr>
<tr>
<td>CC Waiting Approval</td>
<td><img src="image5" alt="Default Text" /></td>
</tr>
<tr>
<td>CC Processing</td>
<td><img src="image6" alt="Default Text" /></td>
</tr>
<tr>
<td>Checkout Device</td>
<td><img src="image7" alt="Default Text" /></td>
</tr>
<tr>
<td>Exceeded monthly dollar limit</td>
<td><img src="image8" alt="Default Text" /></td>
</tr>
<tr>
<td>Exceeded order limit</td>
<td><img src="image9" alt="Default Text" /></td>
</tr>
<tr>
<td>Order held due to over credit limit</td>
<td><img src="image10" alt="Default Text" /></td>
</tr>
<tr>
<td>Order held due to over monthly budget</td>
<td><img src="image11" alt="Default Text" /></td>
</tr>
<tr>
<td>Order held due to order part due</td>
<td><img src="image12" alt="Default Text" /></td>
</tr>
</tbody>
</table>

   **Assigned Text:**
   Your credit card payment has been approved

3. To change a row's assignment, click ![Assign New Text](image13).
4. Under Text Description, click the down arrow and click the name to assign.
5. To cancel your changes, click ![Cancel Changes](image14). To keep your changes, click ![Keep Changes](image15).

**Default Checkout Text**
Until you assign new text to these fields, the default messages are as follows:

- **CC Approved:** Your credit card payment has been approved.
- **CC Declined:** We are sorry, but your credit card payment was declined. Please contact our customer service department to arrange another payment method for this order.
- **CC Other Error:** We are sorry, but there appears to have been an error processing your credit card payment. Please contact our customer service department for assistance.
- **CC Pending Approval:** We are currently processing your credit card payment.
- **CC Processing:** We are currently processing your credit card payment.
- **Exceeded monthly dollar limit:** The order has exceeded your order limit and has been placed on hold. An email has been sent to #FullName# (#Email#) for order approval.
Customizing Site Text and Messages

- **Exceeded order limit**: The order has exceeded your order limit and has been placed on hold. An email has been sent to #FullName# (#Email#) for order approval.

  **Note**: The previous two items are used when an order requires approval. In this case the #FullName# and #Email# variables are replaced with a list of the approvers’ full names and email addresses at the time the order is placed.

- **Order held, due to over credit limit**: We are sorry, but you have exceeded your credit limit. Your order has been placed on hold. Please contact our customer service department for assistance.

- **Order held, due to over monthly budget**: We are sorry, but you have exceeded your monthly budget. Your order has been placed on hold. Please contact our customer service department for assistance.

- **Order held, due to over past due**: We are sorry, but your account is past due. Your order has been placed on hold. Please contact our customer service department for assistance.

### Default Exceeded Order Limit Message For Single Orders

For single orders that require approval, the following custom message is displayed at the top of the check-out summary:

> The order has exceeded your order limit and has been placed on hold. An email has been sent to FirstName LastName (email@email.com) for order approval.

### Default Exceeded Order Limit Messages For Multi-Department Ordering

For multi-department orders requiring approval, a generic non-custom message is displayed at the top of the page:

> We saved your order and submitted it for approval. When the order has been approved and submitted for fulfillment, you receive an email confirmation.

In addition, each order submitted displays a custom message if necessary.
Default Message When Paying Invoices with Credit Card

For single orders that require approval, the following custom message is displayed at the top of the check-out summary:

![Selected Invoices for Payment](image)

**Email Headers and Footers**

You can add an HTML-capable header and footer to the confirmation email messages your customers receive. By default, these headers and footers are not displayed until you assign specific text you have created in the Text Editor.

**Note:** To customize Emails, first enter new text using the Text Editor. Keep in mind, HTML may not be displayed correctly in the recipients’ email programs. We recommend that you test your own HTML messages using test accounts on various email clients.

1. Click the Emails tab.
2. To view what is currently assigned, click 🔄. Assigned text is shown below:

3. To change a row’s assignment, click 🔄.

4. Under Plain-Text Description, click the down arrow and click the name of what you created in Site Text under Plain Text.

5. Under HTML Description, click the down arrow and click the name of what you created in Site Text under HTML.

6. To cancel your changes, click 🔄. To keep your changes, click 🔄.

**Default Mail Format Per Customer in Admin Customer Management**

You can set up certain shoppers to receive only plain-text or only HTML formatted emails by default, or they can set their own preferences.

1. In your Admin Control Panel, click Customer Admin from the left menu.
2. Click Customer Management.
3. Choose a customer to edit with one of the following methods:
   • Click Edit Guest Customer (in the Customer Records box),
   • Enter limits, click Search, click 🔄 by the individual, and click Edit.

4. In the Customer Information box, click Edit.
5. Click the down arrow by the Email Format box to select one of the following:
   • HTML Capable (default setting)
   • Plain Text

**Note:** You can also change this setting when adding new shoppers or in mass using Parameter Maintenance.

6. Click Save.

**Default Mail Format User Preference Setting**

While you can specify the email format your shoppers receive by default, users also can change the email format preference three ways: when creating a new account, when updating their information, or when mass using Parameter Maintenance.

When your shoppers create a new account, they click the Register Me! link under MyAccount in the left side navigation of your shopping site and can set the Email Format as shown here.

When your shoppers update their information, they can click My Account in the top navigation menu, choose Update My Information, and select their Email Format.
Default Mail Format In Mass in Admin Parameter Maintenance

You can set up shoppers in mass to receive only plain-text or only HTML formatted emails by default, or they can set their own preferences.

1. In your Admin Control Panel, click Customer Admin from the left menu.
2. Click Parameter Maintenance.
3. In the Choose a Parameter drop-down box, select Email Format.
4. In the Choose a Value drop-down box, select the current format to change for a group of customers. For example, if your customers are set to receive plain text by default, select Plain Text.
5. Click Search.
6. In the search results that display, you can filter by values in each column to a narrower set of customers to apply the new HTML format. For example, you can filter to a specific account number, department, or even specific name or email address. To filter by keywords within a column, click the blank below the column header, enter a keyword, and click the Filter button to choose an operator, such as EqualTo, Contains, IsEmpty, and so on.
7. In the Apply new parameter value drop-down box, only the remaining options display, not including the value you selected in your search at the top of the screen. Select the value you wish to apply to the selected set of customers.
8. Click Save.
Default HTML Email

Messages have the same HTML format as the HTML Order Confirmation that includes Order Information, Bill To information, and more, but messages have different text, as shown in the following figures.

Order Submitted for Approval

Your order has been approved and submitted for further approval; however, changes have been made by the approver. Changes are indicated in red on each line item directly underneath the item’s description. You may click the following link to go directly to the order: http://localhost/ecinteractive/secure
/OrderApprovalEditor.aspx?oid=33787-0

Order Submitted for Fulfillment

Your order has been submitted for fulfillment. You may click the following link to go directly to the order: http://localhost/ecinteractive/secure
/OrderApprovalEditor.aspx?oid=33787-0

Request for Order Approval

An order has been submitted and requires your approval. You may click the following link to go directly to the order: http://localhost/ecinteractive/secure
/OrderApprovalEditor.aspx?oid=33787-0

Order Approved

The order placed by John Swaringen on 5/17/2008 has been approved. You may click the following link to go directly to the order: http://localhost/ecinteractive/secure
/OrderApprovalEditor.aspx?oid=33787-0
Order Denied

The order placed by John Swaringen on 5/17/2008 has been denied. You may click the following link to go directly to the order: http://localhost/ecinteractive/secure/OrderApprovalEditor.aspx?oid=33787-0

Order Information

| Status | Denied |

Submission Information

| Submitted By | John |

Payment Approved

Your Logo Here

Tracking Number: TLAUTO 355290 100060315:30:21
Approval Code: 582782

<table>
<thead>
<tr>
<th>Order #</th>
<th>Date</th>
<th>Dept.</th>
<th>Debits</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC1003</td>
<td>03/18/2008</td>
<td></td>
<td>400.00</td>
<td>100.00</td>
</tr>
<tr>
<td>CC9003</td>
<td>04/01/2008</td>
<td></td>
<td>326.25</td>
<td>.00</td>
</tr>
</tbody>
</table>

SubTotal: 726.25 100.00

Total: 62625

>As always, thank you for visiting

Payment Declined

Your Logo Here

Tracking Number: TLAUTO 355290 100060315:30:21
Approval Code: 582782

<table>
<thead>
<tr>
<th>Order #</th>
<th>Date</th>
<th>Dept.</th>
<th>Debits</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC1003</td>
<td>03/18/2008</td>
<td></td>
<td>400.00</td>
<td>100.00</td>
</tr>
<tr>
<td>CC9003</td>
<td>04/01/2008</td>
<td></td>
<td>326.25</td>
<td>.00</td>
</tr>
</tbody>
</table>

SubTotal: 726.25 100.00

Total: 62625

>As always, thank you for visiting

continue to next page
Sample Plain Text Email

Big Dog Office Supply
123 Any Street
Fort Worth, TX 76137

Your purchase detail appears below.

Long PO Number: 123-4567-890
Short PO Number: 0

Order Information

Status: Active
Reference #: 32821-0
Order Date: Sep 25, 2007 02:28 PM
Account #: 1004
Department: 102 - SALES AND MARKETING DEPARTMENT

Submission Information

Submitted By: John
Email: j@.com
Phone 

Bill To:

Sample Name
Sample Company Name
Sample Street
Sample, ST 12345

Ship To:

Father Tim
Los Padres Ct.
Fort Worth TX, 12345

<table>
<thead>
<tr>
<th>Line Item #</th>
<th>Qty</th>
<th>List Unit</th>
<th>Price</th>
<th>Ext</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>7.52 PK</td>
<td>7.00</td>
<td>7.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>E-Squared Battery, &quot;AA&quot;, 4/Pack</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>HP 57 Ink Cartridge, 400 Page Yield, Tri-Color</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>18.59 EA</td>
<td>18.59</td>
<td>18.59</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account Book, Journal-Ruled, 150 Page,12-1/4&quot;x7-1/4&quot;, Green</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>99.00 EA</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Step-On Garbage Can, 7 Gallon, 11-1/2&quot;x22&quot;, White</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal: 
Shipping: 52.00
Tax: .00
Total: 140.58

Shipping Instructions: Leave on steps of church

Special Instructions:

We appreciate your Business (Custom Footer)
Home Page Display Order

We've designed the home page interface to be friendly, easy-to-use, and as intuitive as possible. To help you achieve even better results, we give you more control of the information that's shown on the Home page and the order in which you can display it.

In addition to your shopping site's navigation menus, the Home page displays four main pieces of information and in the following order by default: Default News, Home Page Text, Browse Category Display, and Account Specific News. You could resequence these elements, for example, placing Account Specific News first, or moving Default News to the middle of the page.

1. Before you can assign the order of your Home Page news, you must first build text pages for your site. You do this using the Text Editor feature under Site Text in your Admin Control Panel.

2. Once your pages are built, click the Site Text Assignment option in the Site Text menu, and click the Site Pages tab to specify your custom Home page text. For detailed instructions, see the Site Pages section.

3. To resequence or hide items on your shopping site's Home page, click the Site Text Assignment option in the Site Text menu, and click the Home Page Display Order tab.

4. To remove an element from your Home page, click its checkbox in the Hide column.

5. To resequence elements, simply renumber the fields in the Display Order column.

6. Click Save.

7. To require your visitors to select their account to view their Account Specific News, you can click the Select Account to see Account Specific News drop-down box and pick from the list. The default is Not Select Account, which means all shoppers see their personalized news.

8. To see a mock-up of your Home page, click View Home Page Content. (Another way to get there is to click the Current Site link at the top of the page.)
Expand Category Display on Home and Browse Catalog Pages

Yet another feature lets you customize the Browse Category Display section of your Home page. A Site Preferences option lets you expand the content provider categories on the shopper's Home and Browse Catalog web pages.

You can have top-level categories displayed in a specified order using either standard e-content or enhanced content from a provider such as S.P. Richards or United Stationers.

1. In your Admin Control Panel, click Global Settings and then click Site Preferences.

2. Click the check box, Expand Category Display on Home and Browse Catalog Pages. If you check this box, the complete list of level two categories displays, as long as there are not more than six top level categories.

3. Click the Update button.

4. To change how the categories display on the user’s Home and Browse Catalog web pages, click the Edit Category Display Order button.

5. The Regular Categories tab is open by default. You may select the catalogs from your Content Provider. The catalogs drive the categories.

6. Click Get Categories to see all the first level categories from your selected providers.

7. To resequence categories, simply renumber the fields in the Rank column.

8. Click Save Category Display Order.

9. Click the Enhanced Categories tab and repeat Steps 5-8.
New User Registration

You can customize messages that display when a user elects to register for an account, depending on the options available: Create Online Account or No Automatic Account Creation.

**Note:** To customize New User Registration, enter new text using the Text Editor.

1. In Site Text Assignment, click the New User Registration tab.

2. To view what is currently assigned, click ⬤.

3. To change a row’s assignment, click 📪.

4. Under Text Description, click the down arrow and click the name to assign.

5. To cancel your changes, click ✖️. To keep your changes, click ✅.

Account News

You can communicate news to your customers, which they can access from their MyAccount menu.

**Note:** To customize Account News, first enter new text and format it using the Text Editor. With the HTML-capable editor, you can easily display images that you’ve uploaded; flyer or catalog links that you’ve uploaded; or links to specific pages, external sites, or customer-specific email addresses. You can also format the messages with fonts, color, bold, italic, and so on. In Text Editor, you can make copies of existing text blocks and edit them slightly to fit different types of accounts.

When you are ready to assign text blocks to one or more accounts, do the following:

1. On the left navigation menu, click Site Text.

2. Select Account News.

3. In Available Pages, click the down arrow and select the news text block.

4. To see what the text looks like, click 📦 beside the page to view it.

5. In Available Accounts, click an account (hold down the Shift key to select multiple consecutive accounts, or hold the Ctrl key to select/deselect multiple accounts).

6. Click the Add button.
7. If you make a mistake in assigning a customer to a news text block, you can select the account in Assigned Accounts and click Delete.

**System News**

<table>
<thead>
<tr>
<th>Available Pages:</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Accounts:</td>
<td>Default Acct 10039 - TINA -</td>
</tr>
<tr>
<td>Assigned Accounts:</td>
<td></td>
</tr>
</tbody>
</table>

**Page Content**

**SAMPLE**

**Error Text**

Here you can customize some of the error messages that ECinteractive displays. For each message, you see the most recent custom message you specified or our default error message. The defaults are listed below:

<table>
<thead>
<tr>
<th>Error</th>
<th>Message to User</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exception Occurred</td>
<td>An Unexpected Error Has Occurred.</td>
<td>This message displays if the server had trouble loading the page or if the back-end system or third party system (such as enhanced content or microsite) does not respond within normal timeframes.</td>
</tr>
<tr>
<td>Items Not Allowed</td>
<td>You are not allowed to order this.</td>
<td>If you restrict a customer to the current list of items or catalogs, this message displays if the customer tries to purchase an item outside of the restricted list.</td>
</tr>
<tr>
<td>No Search Results</td>
<td>The Search Returned No Results.</td>
<td>This message displays on Enhanced Search, Enhanced Product Detail, Advanced (Standard) Search, and Standard Product Detail, when no items are found matching the search term on the backend or third party system (such as enhanced content or microsite).</td>
</tr>
</tbody>
</table>

To customize the error messages, do the following:

1. On the left navigation menu, click Site Customizing.
2. Select Error Text.
3. Click the Select an Error drop-down box, and click a message to change.

4. Change the assigned text as needed using the WYSIWIG Text Editor. For detailed instructions, see the Using Text Editor section.

**Note:** Each error message may include up to 250 characters. (Spaces count as characters.)

5. Click Save.