



# Basic ecPortal Guidelines

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[www.ecutopia.com](http://www.ecutopia.com)

Welcome to ecUtopia!

Please use this document as a reference for navigating and operating our user-friendly ecPortal. Our goal is to make your management of orders an easy and simple part of your day.

The Guideline's main purpose is to advise on how to locate a Purchase Order and how to create the three essential Return Documents as required by retailers for every Purchase Order:

1. PO Acknowledgement (855/POACK): *confirms product, cost, quantity and ship date*
2. Advanced Ship Notice (856/ASN): *created when product is ready to ship with a tracking number available*
3. Invoice (810/INV): *created after ASN has already been sent*

Each retailer has specific requirements for return documents. Please make sure you are aware of the requirements for each.

## ecUtopia's Help and Training

If you would like to obtain hands on training or if you experience any issues while using ecUtopia.com, you are more than welcome to contact our Support team at [Support@ecutopia.com](mailto:Support@ecutopia.com) or call directly at (858) 634-5055.

ecUtopia offers a variety of different options for training. Over the phone training and visual aids can be provided upon request. Our most commonly used tool for Hands On Training is GoToMeeting.com. Online meetings can be set up by appointment or on the go and allow for personalized training and communication directly on your computer. Our team will simply send you a link and conference number to dial in to and the training can commence.

## Our Normal Business Hours:

Monday – Friday  
5:00 am PST – 4:00 pm PST  
6:00 am MT – 5:00 pm MT  
7:00 am CT – 6:00 pm CT  
8:00 am EST – 7:00 pm EST

## After Hours Emergency Support

If in the event of a business stopping emergency that occurs outside of ecUtopia's business hours, we do offer an alternate communication source to alert our team:

[alerts@ecutopia.pagerduty.com](mailto:alerts@ecutopia.pagerduty.com)

*Please note this communication source should ONLY be used in the event of a business preventing emergency outside of our business hours.*

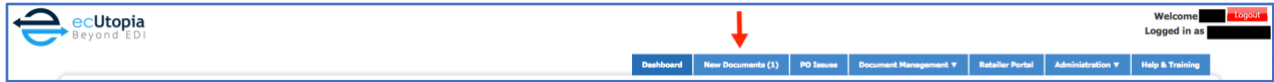


## Table of Contents

*Click on Page Number for Hyperlink to Desired Subject*

<b>New Documents</b> .....	<b>3</b>
<b>Document Management</b> .....	<b>4</b>
<b>Viewing the Receipt Status of a Purchase Order</b> .....	<b>4</b>
<b>Return Documents in Document Management</b> .....	<b>5</b>
<b>How to Generate Return Documents for Purchase Orders</b> .....	<b>6</b>
<b>Purchase Order Acknowledgement</b> .....	<b>6</b>
<b>Acknowledging a Purchase Order: How to Create a PO ACK</b> .....	<b>6</b>
<b>Advanced Ship Notice</b> .....	<b>9</b>
<b>How to Create an Advanced Ship Notice (ASN): Build Shipment</b> .....	<b>9</b>
<b>Invoice</b> .....	<b>11</b>
<b>How to Create an Invoice</b> .....	<b>11</b>
<b>Archiving</b> .....	<b>13</b>
<b>Archiving Completed Purchase Orders</b> .....	<b>13</b>

## New Documents

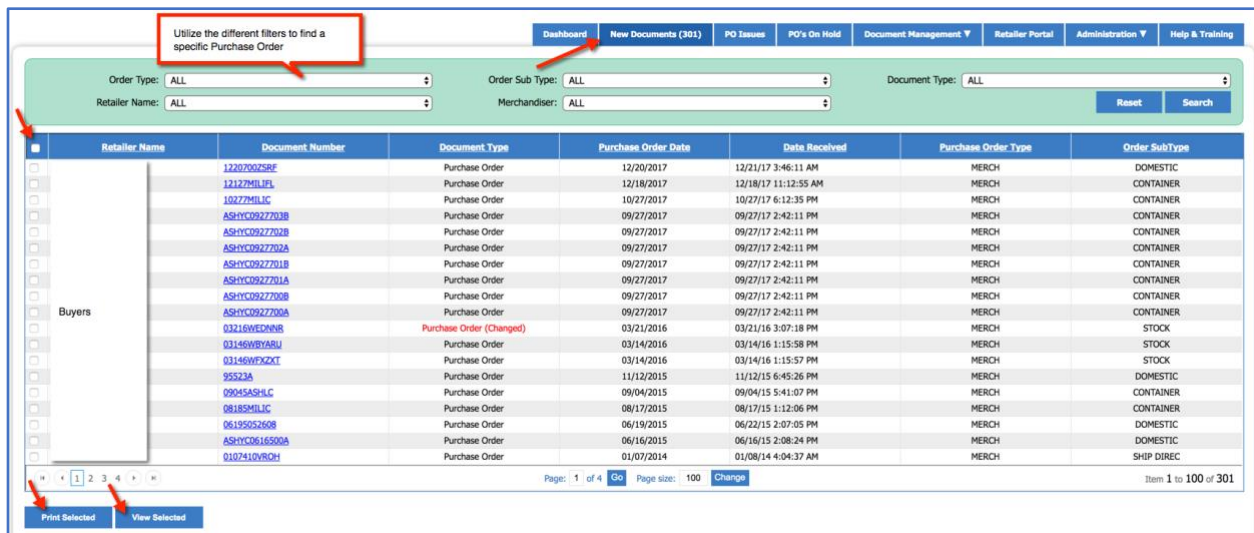


The 'New Documents' tab will contain all new Purchase Orders and Purchase Order Changes that have been submitted by your Retailer's Buyer.

Purchase Orders are also commonly referred to as 850 documents, and Purchase Order Changes are commonly referred to as 860 documents.

The 'New Documents' tab will highlight how many new orders are waiting for review. By selecting 'New Documents', all documents will be available for the Seller/Vendor to open and review. Purchase Order Changes will be highlighted in red as 'Purchase Order (Changed)' under 'Document Type'.

You have the opportunity to Print and View the documents in 'New Documents' by selecting the check box of the specific purchase orders needed. Individual and/or multiple can be selected.



Utilize the different filters to find a specific Purchase Order

Order Type: ALL | Order Sub Type: ALL | Document Type: ALL  
Retailer Name: ALL | Merchandiser: ALL

Buyers	Retailer Name	Document Number	Document Type	Purchase Order Date	Date Received	Purchase Order Type	Order Sub Type
		12207002SRE	Purchase Order	12/20/2017	12/21/17 3:46:11 AM	MERCH	DOMESTIC
		12127MILFL	Purchase Order	12/18/2017	12/18/17 11:12:55 AM	MERCH	CONTAINER
		10277MILIC	Purchase Order	10/27/2017	10/27/17 6:12:35 PM	MERCH	CONTAINER
		ASHYC0927733B	Purchase Order	09/27/2017	09/27/17 2:42:11 PM	MERCH	CONTAINER
		ASHYC0927732B	Purchase Order	09/27/2017	09/27/17 2:42:11 PM	MERCH	CONTAINER
		ASHYC0927732A	Purchase Order	09/27/2017	09/27/17 2:42:11 PM	MERCH	CONTAINER
		ASHYC0927731B	Purchase Order	09/27/2017	09/27/17 2:42:11 PM	MERCH	CONTAINER
		ASHYC0927731A	Purchase Order	09/27/2017	09/27/17 2:42:11 PM	MERCH	CONTAINER
		ASHYC0927730B	Purchase Order	09/27/2017	09/27/17 2:42:11 PM	MERCH	CONTAINER
		ASHYC0927730A	Purchase Order	09/27/2017	09/27/17 2:42:11 PM	MERCH	CONTAINER
		03216EDNBB	Purchase Order (Changed)	03/21/2016	03/21/16 3:07:18 PM	MERCH	STOCK
		03146WRYARJ	Purchase Order	03/14/2016	03/14/16 1:15:58 PM	MERCH	STOCK
		03146WFZXT	Purchase Order	03/14/2016	03/14/16 1:15:57 PM	MERCH	STOCK
		95523A	Purchase Order	11/12/2015	11/12/15 6:45:26 PM	MERCH	DOMESTIC
		09045ASHLC	Purchase Order	09/04/2015	09/04/15 5:41:07 PM	MERCH	CONTAINER
		0818SMILC	Purchase Order	08/17/2015	08/17/15 1:12:06 PM	MERCH	CONTAINER
		06195052608	Purchase Order	06/19/2015	06/22/15 2:07:05 PM	MERCH	DOMESTIC
		ASHYC0616500A	Purchase Order	06/16/2015	06/16/15 2:08:24 PM	MERCH	DOMESTIC
		0107310VBCH	Purchase Order	01/07/2014	01/08/14 4:04:37 AM	MERCH	SHIP DIREC

Page: 1 of 4 | Page size: 100 | Item 1 to 100 of 301

Print Selected | View Selected

To open the purchase orders, select the hyperlinked document number.

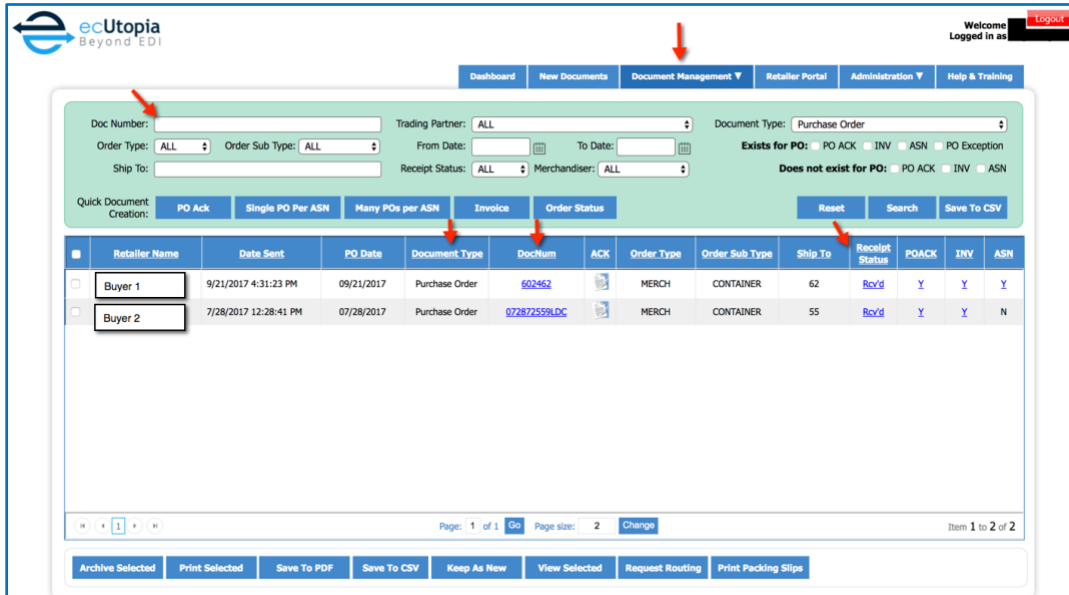
Once a new document has been selected, it will progress out of 'New Documents' and into 'Document Management', where return documents can be built. This action will change the document's receipt status from 'Initial' to 'Received' on the ecPortal, alerting your Buyer that the new document has been received successfully.

A document in 'Document Management' can be moved back in to 'New Documents' if needed. Search for the document in 'Document Management', select the document line and select 'Keep As New' at the bottom of the Portal webpage.

This document will then move from Document Management to New Documents.

## Document Management

Finding your Purchase Order once it has progressed from 'New Documents'



The screenshot shows the 'Document Management' tab selected in the navigation menu. The search area includes fields for Doc Number, Trading Partner, Document Type, Order Type, Order Sub Type, From Date, To Date, Ship To, Receipt Status, and Merchandise. Below the search area is a table with the following data:

Buyer	Retailer Name	Date Sent	PO Date	Document Type	DocNum	ACK	Order Type	Order Sub Type	Ship To	Receipt Status	POACK	INV	ASN
Buyer 1		9/21/2017 4:31:23 PM	09/21/2017	Purchase Order	<a href="#">602462</a>		MERCH	CONTAINER	62	Rcv'd	Y	Y	Y
Buyer 2		7/28/2017 12:28:41 PM	07/28/2017	Purchase Order	<a href="#">072872559LDC</a>		MERCH	CONTAINER	55	Rcv'd	Y	Y	N

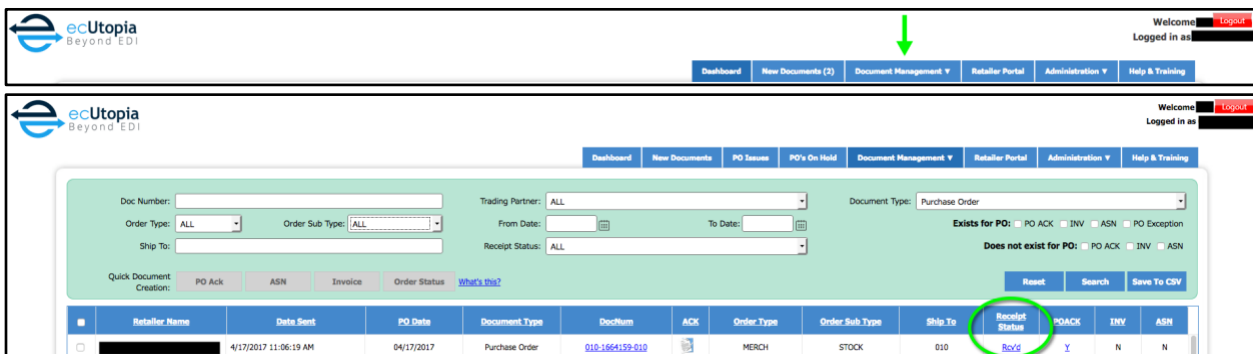
Document Management contains all of Purchase Orders that are in production, the Trading Partner associated to the Purchase Orders, the Receipt Status of the Purchase Order, and the Return Documents that have been transmitted.

Similar to 'New Documents', there is a Search Engine with a variety of different filters that can be utilized to search for a specific document. Key filters include 'Doc Number', 'Trading Partner' and 'Document Type', all of which will narrow your search when looking for a particular PO or PO Change and its return documents.

To open a Purchase Order, simply select the hyperlinked number under the 'DocNum' column.

## Viewing the Receipt Status of a Purchase Order

Log in to ecUtopia.com and select the 'Document Management' tab. Every Purchase Order has a 'Receipt Status' column that will show either Late, Initial, Rcv'd or Final. A Vendor can create PO Acknowledgements (855's), Invoices (810's) and ASN's (856's) as long as the Receipt Status of the document is not in Final Status.



The screenshot shows the 'Document Management' tab selected. The search area is visible. Below it is a table with one row:

Retailer Name	Date Sent	PO Date	Document Type	DocNum	ACK	Order Type	Order Sub Type	Ship To	Receipt Status	POACK	INV	ASN
	4/17/2017 11:06:19 AM	04/17/2017	Purchase Order	<a href="#">010-1864159-010</a>		MERCH	STOCK	010	Rcv'd	Y	N	N

How do Documents on the Web Portal obtain a status of [Final](#)?

1. The Retailer sends ecUtopia multiple files via EDI throughout the day indicating what Documents have achieved a Final Status. Those files are then used to update the status on the Web Portal.
2. Once the Document has a Receipt Status of [FINAL](#), the Vendor can no longer make any additional changes to the Document.
3. Only the Retailer can change the status of a Purchase Order on the ecPortal.

## Return Documents in Document Management

Every Purchase Order has three columns specific to the PO ACK, INV, and ASN. The three columns will contain a Y or an N.

Doc Number	Retailer Name	Date Sent	PO Date	Document Type	Doc Num	ACK	Order Type	Order Sub Type	Ship To	Receipt Status	POACK	INV	ASN
672872559LDC	Buyer	7/28/2017 12:28:41 PM	07/28/2017	Purchase Order	672872559LDC		MERCH	CONTAINER	SS	Rec'd	Y	Y	N

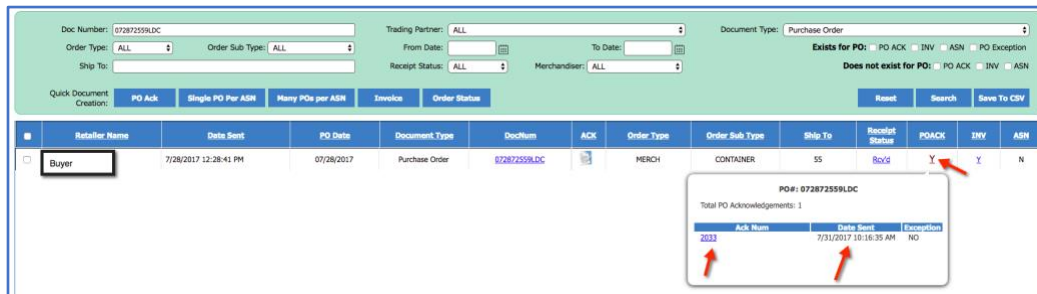
The Y and the N represent whether that particular return document has been submitted for a PO. An N represents No, for no return document and Y represents Yes for return documents. The Y will either be a **Red** Y or **Blue** Y. The **Blue** Y indicates that no exceptions are included in the ACK, and the **Red** Y indicates that there are exceptions.

**An exception represents any change that has been made to price, qty, or dates in the ACK.**

If the Y is a bolded **Red** color or bolded **Blue** color, this indicates that multiple acknowledgments have been submitted for the Purchase Order.

By hovering over the Y, detail information about the document, such as when the return document was sent, will populate.

To open a Return Document, select the Y directly or the hyperlinked document number that is displayed once you hover over the Y.



The screenshot shows a search and filter interface at the top with various dropdowns and buttons. Below is a table with columns: Retailer Name, Date Sent, PO Date, Document Type, Doc Num, ACK, Order Type, Order Sub Type, Ship To, Receipt Status, POACK, INV, and ASN. A tooltip is displayed over the 'Y' in the POACK column for document 672872559LDC. The tooltip shows 'Total PO Acknowledgements: 1' and a table with columns 'Ack Num', 'Date Sent', and 'Exception'. One entry is shown: Ack Num 2033, Date Sent 7/31/2017 10:16:35 AM, Exception NO. Red arrows point to the 'Y' in the table and the tooltip content.

Once opened, any return document, Purchase Order or Purchase Order Change can be printed, saved to a PDF or Saved to a CSV.

# How to Generate Return Documents for Purchase Orders

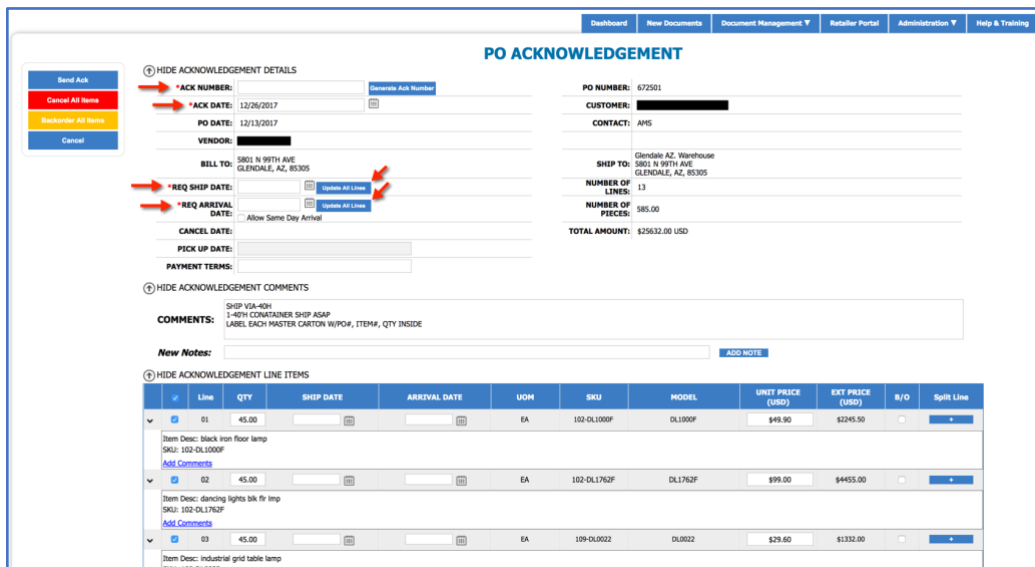
## Purchase Order Acknowledgement

A PO ACK, or an 855 as it is commonly referred to, is a return document sent to the Buyer acknowledging that the Purchase Order has been received and the details of the order have been processed by the Seller. Many Buyers require an acknowledgement for every Purchase Order to be submitted within 48 hours of the Purchase Order being sent.

The PO ACK acknowledges the product, the estimated Ship Date, the quantity and the cost of the items that have been ordered. Any cancellations or back orders are expected to be communicated in the PO ACK.

### Acknowledging a Purchase Order: How to Create a PO ACK

1. In Document Management, you will see Live/Production Purchase Orders listed below the Green Search Tool Box under the "Doc Num" column.
2. Open the purchase order you need to create an Acknowledgment for by selecting the Blue Hyperlinked Purchase Order number under the 'Doc Num' column.
3. Once opened, select 'Create Ack' to create a PO Acknowledgement.



**PO ACKNOWLEDGEMENT**

HIDE ACKNOWLEDGEMENT DETAILS

\*ACK NUMBER:

\*ACK DATE: 12/26/2017

PO DATE: 12/13/2017

VENDOR:

BILL TO: 5801 N 99TH AVE  
 GLENDALE, AZ, 85305

\*REQ SHIP DATE:

\*REQ ARRIVAL DATE:

CANCEL DATE:

PICK UP DATE:

PAYMENT TERMS:

HIDE ACKNOWLEDGEMENT COMMENTS

COMMENTS: SHIP VIA 40H  
 1-40TH CONTAINER SHIP ASAP  
 LABEL EACH MASTER CARTON W/PO#, ITEM#, QTY INSIDE

New Notes:

HIDE ACKNOWLEDGEMENT LINE ITEMS

Line	QTY	SHIP DATE	ARRIVAL DATE	UOM	SKU	MODEL	UNIT PRICE (USD)	EXT PRICE (USD)	B/O	Split Line
01	45.00			EA	102-OL1000P	OL1000P	\$49.90	\$2245.50		
Item Desc: Black iron floor lamp SKU: 102-OL1000P <a href="#">Add Comments</a>										
02	45.00			EA	102-OL1762P	OL1762P	\$99.00	\$4455.00		
Item Desc: dimming lights blk fr lamp SKU: 102-OL1762P <a href="#">Add Comments</a>										
03	45.00			EA	109-OL0022	OL0022	\$29.60	\$1332.00		
Item Desc: industrial grid table lamp sku: 109-OL0022										

4. There are four red asterisk fields that are required in order to send a PO Acknowledgment.
5. The '\*ACK NUMBER': an internal Ack Number can be entered. However, if using an internal number, please ensure this value is unique to each Acknowledgment sent. ecPortal will generate a unique Ack Number by selecting 'Generate Ack Number' button.
6. The '\*ACK DATE' is the date the PO Acknowledgment date is being created (this date is already populated for you).
7. The '\*REQ SHIP DATE' is the confirmed or estimated date the product will ship
  - a. The purchase order contains the desired ship date communicated by the Buyer. This may be entered as the same date or next day as the PO indicating for you to Ship ASAP. You must update the date with the correct information.
8. After entering the Ship Date, select 'Update All Lines' and the Ship Date will also populate for each Product Line at the Line Level below.

9. The '\*REQ ARRIVAL DATE' is the estimated Arrival date the product will arrive
10. Enter your estimated Arrival Date and select 'Update All Lines' and the Arrival date will also populate for each product line at the line level below.
11. Quantity and Price can be updated on each line item at the product line level as needed. Any adjustments will be alerted in Red as an exception for the Retailer/Buyer's review.
12. If a line item has been discontinued, the quantity must be set to zero.

Line	QTY	SHIP DATE	ARRIVAL DATE	UOM	SKU	MODEL	UNIT PRICE (USD)	EXT PRICE (USD)	B/O	Split Line
01	0.00	12/29/2049	12/30/2049	EA	102-OL1000F	DL1000F	\$49.90	\$245.50	<input type="checkbox"/>	

Item Desc: black iron floor lamp  
SKU: 102-OL1000F  
[Add Comments](#)

13. If a line item is on Back Order and shipping at a later date, the quantity remains the same, and the ship date must be changed to the estimated date the product will be available to ship. Select the B/O Check Box that indicates the line item is Back Ordered

Line	QTY	SHIP DATE	ARRIVAL DATE	UOM	SKU	MODEL	UNIT PRICE (USD)	EXT PRICE (USD)	B/O	Split Line
01	45.00	02/01/2018	02/08/2018	EA	102-OL1000F	DL1000F	\$49.90	\$245.50	<input checked="" type="checkbox"/>	

Item Desc: black iron floor lamp  
SKU: 102-OL1000F  
[Add Comments](#)

14. Once all of the information has been entered and is accurate, select the 'Send Ack' button located on the left hand side of the screen.



Once a PO Acknowledgment has been sent, a Blue or Red Y will appear under the PO ACK Column in 'Document Management' for the Purchase Order. The Blue Y indicates that no exceptions are included in the ACK, and the Red Y indicates that there are exceptions to price, quantity, or dates in the ACK.

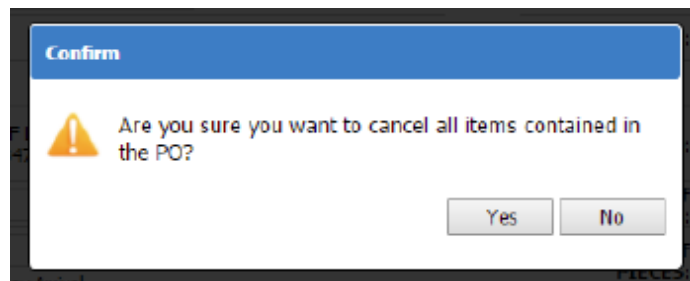
Please Note: the 'Cancel All Items' and 'Backorder All Items' option below the 'Send Ack' button are to only be used if an entire order is Back Ordered or Cancelled. Do not use for partial Cancellations or partial Back orders.

An (855) Acknowledgment is expected to be sent for a Purchase Order that has been completely cancelled.

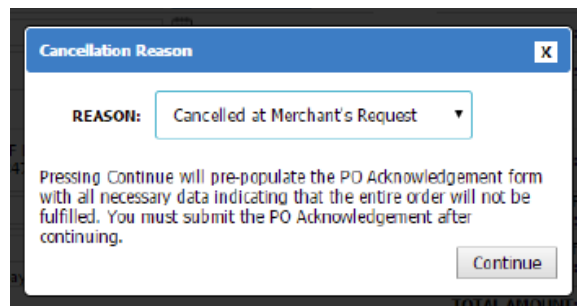
To Cancel a Whole Purchase Order: Create a PO ACK and select 'Cancel All Items'



Clicking 'Cancel All Items' will prompt **Confirmation**



By selecting 'Yes', a Cancellation Reason prompt will appear next



After choosing a Cancellation Reason, clicking 'Continue' will autofill the cancellation information in the Acknowledgement. The Ack Number will have CANCEL\_ appended, Ship Dates will be set to 12/31/2049, a date and Reason will be sent in the Comment section and all Quantities at the line item level will be set to zero. Select 'Send Ack' for an official (855) PO ACK document to be sent to the Retailer.

To Back Order All Items, follow the same steps of procedure by selecting 'Backorder All Items'. A Confirmation and a Backorder Reason Prompt will follow. By selecting 'Continue', the last step will be to fill in the \*Requested Ship Date and \*Requested Arrival Date, which identifies the Estimated Date the product will be available to ship. "Update All Lines" and select "Send Ack".

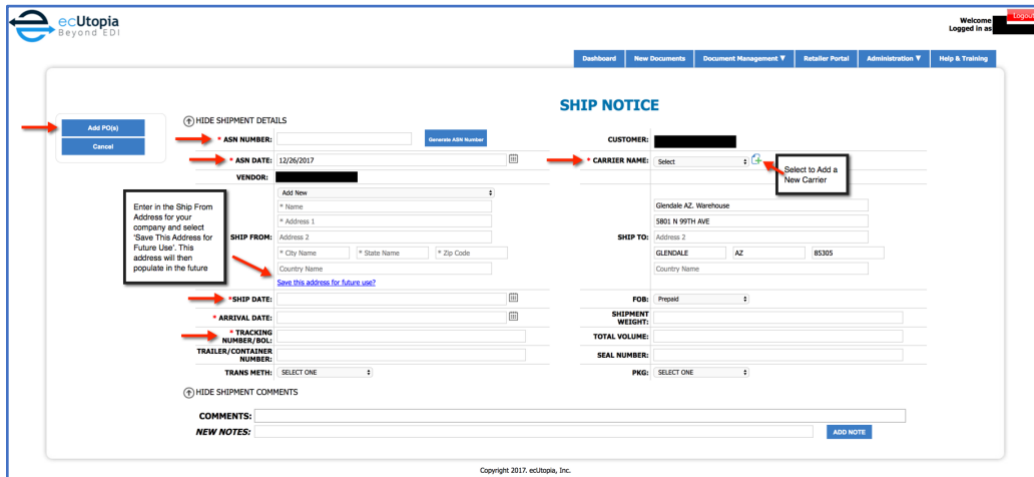


## Advanced Ship Notice

### How to Create an Advanced Ship Notice (ASN): Build Shipment

An Advanced Ship Notice, also commonly known as the ASN or 856 document, is created when the product is ready to ship with tracking information available.

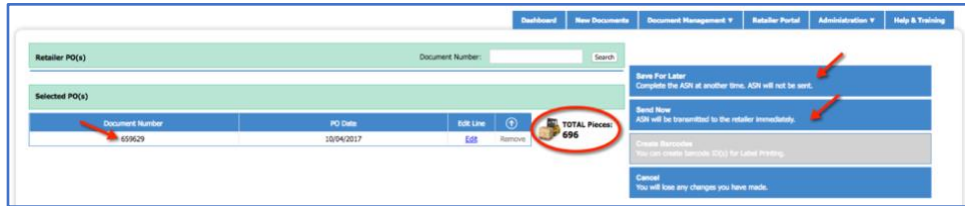
1. Open the purchase order you need to create an ASN for by selecting the blue hyperlinked Purchase Order number under the 'Doc Num' column.
2. Select 'Build Shipment'.
3. There are five red asterisk fields that are required when Building a Shipment.



4. The '\*ASN NUMBER' can contain an internal Advance Ship Notice number. Please ensure this value is unique to each ASN. Or by selecting 'Generate ASN Number', ecPortal will generate one for you.
5. The '\*ASN DATE' is the Date the ASN is being created, which will already be populated for you
6. The '\*SHIP DATE' is the confirmed date the Product will be shipping.
7. The '\*TRACKING NUMBER/BOL' for the shipment must be entered prior to sending the ASN. BOL is short for Bill of Lading.
8. The '\*CARRIER NAME' is the confirmed Carrier shipping the product and their official SCAC code. Once a Carrier has been entered, their information can be chosen for future ASN's.
  - a. To enter a Carrier name, you will need to obtain the Carriers SCAC code. The SCAC code is similar to a Carrier's Vendor Code. For example: For UPS, the SCAC is UPSN. SCAC codes are required to ship to the USA.
  - b. Select the green '+' sign.
  - c. Enter the Carrier name and the SCAC code in to the fields indicated by the red asterisk.
  - d. Save the Carrier by selecting the Blue and Green File/Floppy disc icon.
9. Once all of the red asterisk information has been fulfilled, select the 'Add PO(s)' button at the top left of the ecPortal screen.
10. The Purchase Order you are creating the ASN for will already be included under 'Selected PO(s)'. Additional PO's with the same Ship From Address can be included in the Advance Ship Notice by selecting them as listed in Retailer POs.
11. The Total Pieces that are included in the Purchase Order is displayed and the items can viewed by selecting 'Edit Line'.

*Please note: The number of pieces in the ASN need to reflect the items that are actually shipping under this specific ASN/Tracking Number combination. To edit the quantities being shipped by line, click the hyperlinked 'Edit' button to make any necessary adjustments.*

12. You can save the ASN for later or if ready to send, please select 'Send Now'.

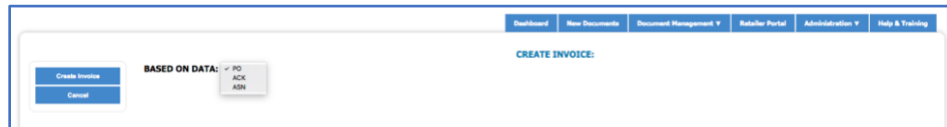


Once an ASN has been sent, a **Blue Y** will appear under the ASN Column in 'Document Management' for the Purchase Order.

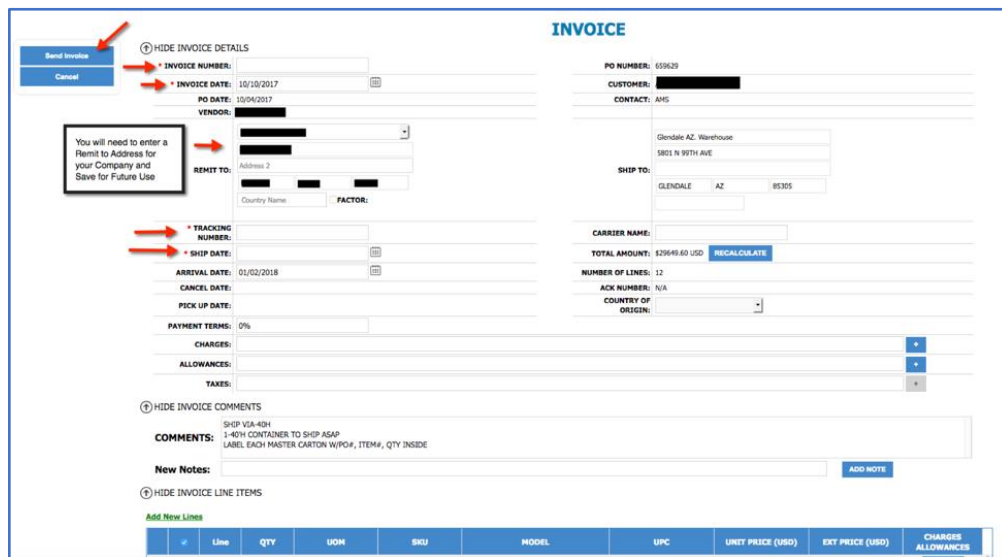
## Invoice

### How to Create an Invoice

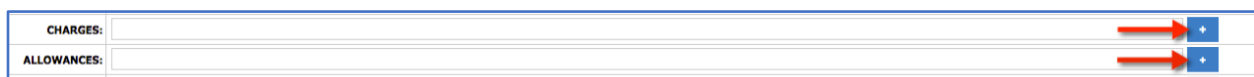
1. Open the Purchase Order you need to create an Invoice for by selecting the blue hyperlinked Purchase Order number under the 'Doc Num' column in 'Document Management'
2. Select 'Create Invoice'
3. Select the document to base the invoice on (ASN is recommended) and select 'Create Invoice'



4. There are 4 red asterisk fields that are required when creating an Invoice



5. '\*INVOICE NUMBER' is the internal invoice number you will manually enter
6. '\*INVOICE DATE' is the current date the Invoice is being created
7. '\*TRACKING NUMBER' is the Tracking Number for the Product Shipment. Please enter if not already populated from the ASN Document
8. '\*SHIP DATE' is the date the Product has shipped. It will be pre-populated if based on ASN.
9. If Charges and Allowances need to be submitted on an Invoice, please use the "Charges" field at the header level under Payment Terms.
  - a. Click the '+' sign to the far right and select the correct criteria from the drop down's. If this charge or allowance should be on every single invoice, select the hyperlink 'Default Setting'.



Charges And Allowances

**Select Type:**

**Description:**

**Amount:**

SELECT	Type	Description	Amount (USD)	Percentage	Default
There are no Charges or Allowances for this Purchase Order.					

10. Canadian Taxes are populated based on the Province of the Ship to address and are automatically calculated to be included on the "TAXES" line of the Invoice. Please make sure to select the check box 'We need to include Canadian Taxes for this Invoice'
11. Once all of the information is correct, select 'Send Invoice'

Once an Invoice has been sent, a **Blue Y** will appear under the INV Column in 'Document Management' for the Purchase Order.

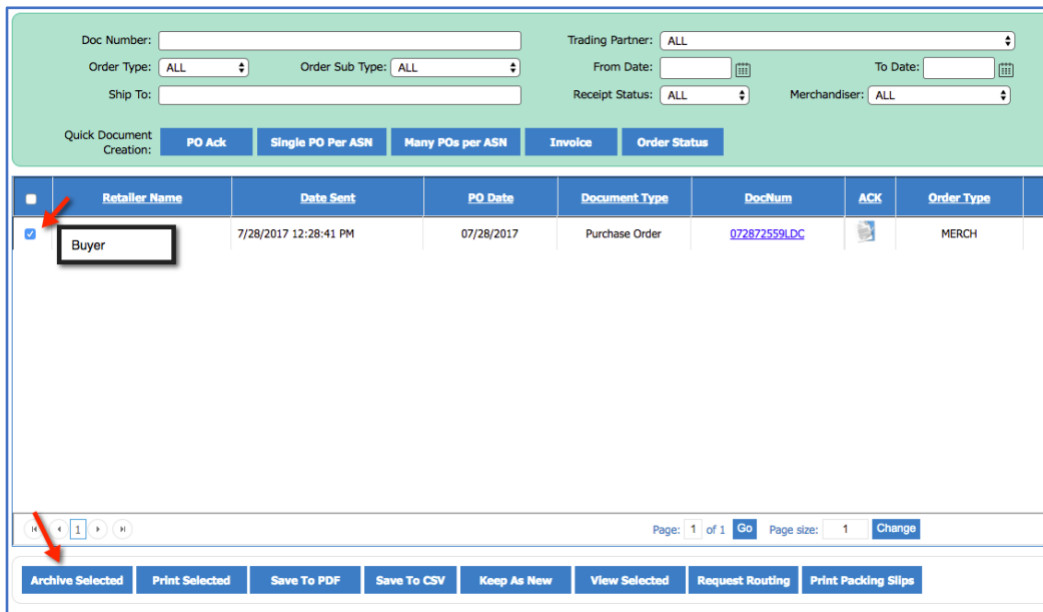
## Archiving

### Archiving Completed Purchase Orders

Once a Purchase Order has been fulfilled and completed, Purchase Orders can be filed in to the Archive database and removed from Document Management.

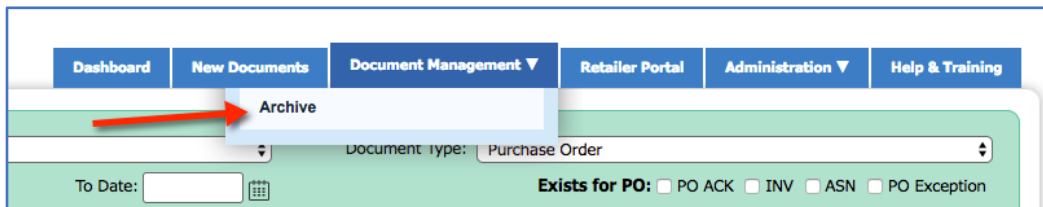
Archiving a completed Purchase Order will allow for users to organize and separate Orders that are still in Process from Orders that have been fulfilled.

Select the Purchase Order you wish to archive by checking the box to the left of the PO and select 'Archive Selected' at the bottom of the Document Management Page.



The screenshot shows a web interface for document management. At the top, there are search filters for Doc Number, Trading Partner, Order Type, Order Sub Type, From Date, To Date, Ship To, Receipt Status, and Merchandiser. Below these are buttons for 'Quick Document Creation' such as 'PO Ack', 'Single PO Per ASN', 'Many POs per ASN', 'Invoice', and 'Order Status'. A table lists documents with columns: Retailer Name, Date Sent, PO Date, Document Type, DocNum, ACK, and Order Type. One row is selected, with a checkbox checked and a red arrow pointing to it. The 'Retailer Name' for this row is 'Buyer'. At the bottom of the interface, there is a navigation bar with buttons: 'Archive Selected', 'Print Selected', 'Save To PDF', 'Save To CSV', 'Keep As New', 'View Selected', 'Request Routing', and 'Print Packing Slips'. A red arrow also points to the 'Archive Selected' button.

The Archive Database can be accessed by hovering your cursor over 'Document Management', and selecting 'Archive'



The screenshot shows a navigation menu with the following items: 'Dashboard', 'New Documents', 'Document Management', 'Retailer Portal', 'Administration', and 'Help & Training'. The 'Document Management' item is expanded, showing a sub-menu with 'Archive' selected, indicated by a red arrow. Below the menu, there is a 'Document type:' dropdown set to 'Purchase Order' and a 'To Date:' field. At the bottom, there are checkboxes for 'Exists for PO': PO ACK, INV, ASN, and PO Exception.

Purchase Orders that have been moved in to the Archive can also be moved back in to Document Management by selecting 'Move to Active' at the bottom of the Archive page.

Purchase Orders are never deleted or removed from ecPortal, they will always be accessible in New Documents, Document Management or the Archive.

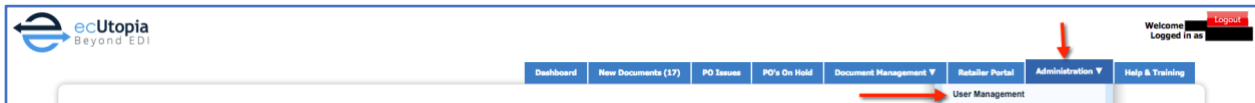
## User Management

User Management is a feature on the ecPortal that allows for an Administrative User to add, edit or delete users. User Management is only available to user's that are classified as 'Administrators' and they have access to every users' account.

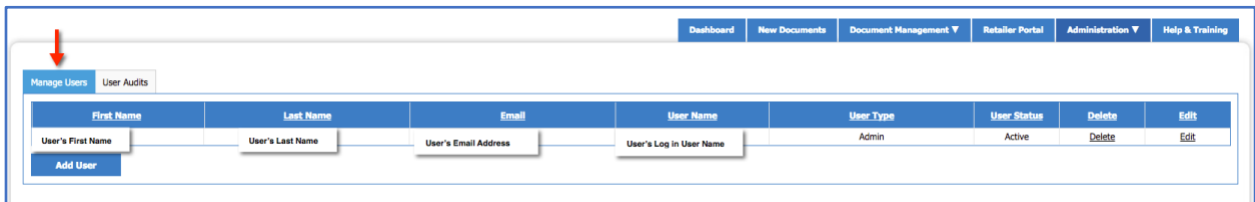
Users that are classified as 'Manager' or 'Staff', have access to their own User Profiles only. Each user can edit their own profiles by using the same steps as indicated below and selecting 'User Profile'.

### Accessing User Management as an Administrator

Hover over 'Administration' and select 'User Management'.

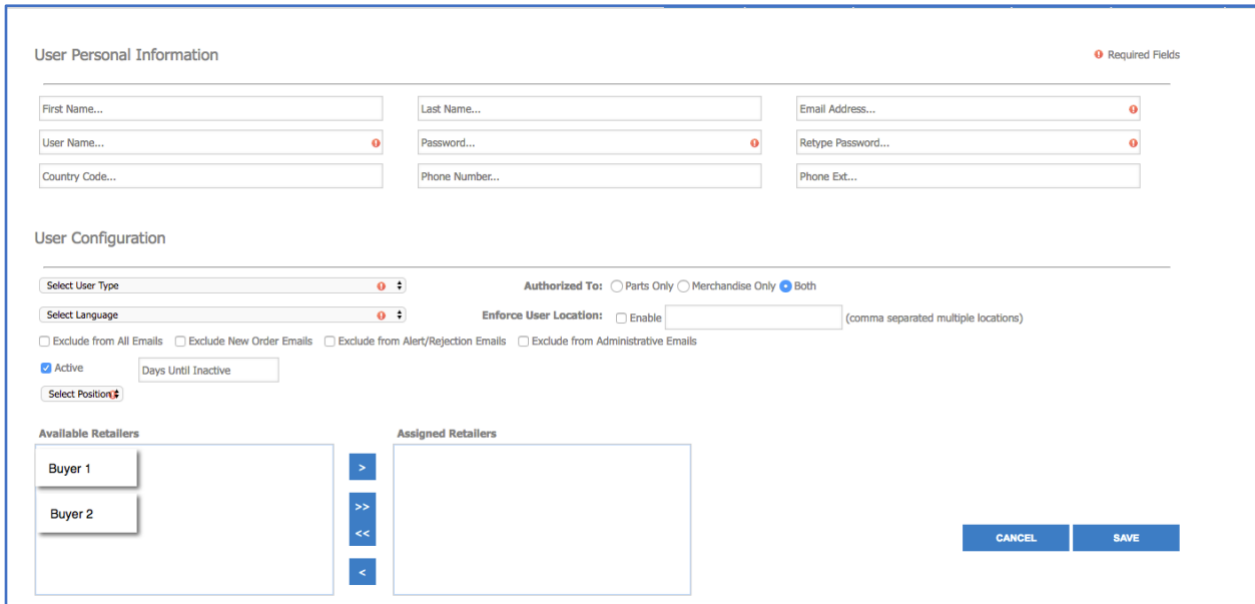


This will take you directly to the 'Manage Users' tab, where all of all of your current users are listed. The 'Manage Users' tab gives a higher level view of the email addresses, usernames and user types that are currently associated to each User.



To add a New User, select 'Add User' and this will take you to the 'User Personal Information' Page

Fill in as much Personal Information as needed. The required fields to create a successful user are indicated by a Red Exclamation Point.



**User Personal Information** Required Fields

First Name... Last Name... Email Address...  
 User Name... Password... Retype Password...  
 Country Code... Phone Number... Phone Ext...

**User Configuration**

Select User Type: [dropdown] Authorized To:  Parts Only  Merchandise Only  Both  
 Select Language: [dropdown] Enforce User Location:  Enable [text] (comma separated multiple locations)  
 Exclude from All Emails  Exclude New Order Emails  Exclude from Alert/Rejection Emails  Exclude from Administrative Emails  
 Active Days Until Inactive: [text]  
 Select Position: [dropdown]

**Available Retailers** **Assigned Retailers**

Buyer 1 > >> << <  
 Buyer 2

**CANCEL** **SAVE**

The Email Address is the current address that the user expects to receive email notifications and alerts. The User Name will populate the email address automatically, however the username can be personalized by the User as well.

The Password must be entered twice for compatibility. The password must be 6 characters minimum, contain atleast one lower case letter, one upper case letter, one number and one special character. Valid special characters are: @#%^&+=

The User Type determines the level of access and privileges for the new user:

- Staff – Staff users have the ability to view and print documents as needed. They do not have access to creating return documents or changes on the Web Portal. This is a View Access Only User Type.
- Manager – Managers have the ability to create and manage Return Documents for Purchase Orders. They have the ability to make adjustments to their own User Accounts. They do not have overall visibility of other users.
- Administrator – has full access to the Portals full capabilities, access to all users, management of orders, Application Configuration, and Billing.

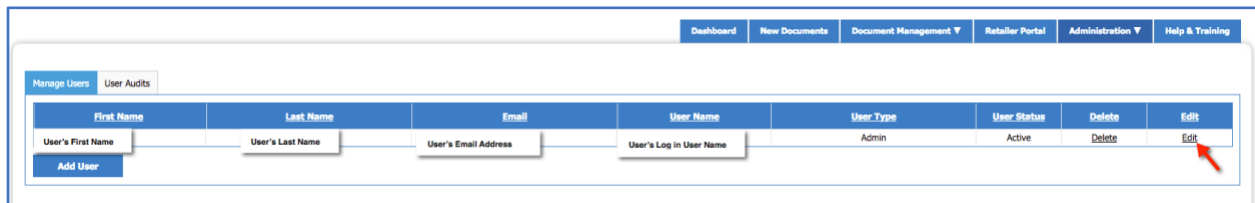
Select Language gives the opportunity for the User to view the Portal in the Language of their choice. The User has the option to be excluded from Specific Emails by selecting the Check Box that pertains to their preference.

Select Position indicates the User’s Role

Assign the Available Retailers this User will need access to by moving the Retailer of Choice out of the ‘Available Retailer’s’ Box to the ‘Assigned Retailer’s Box

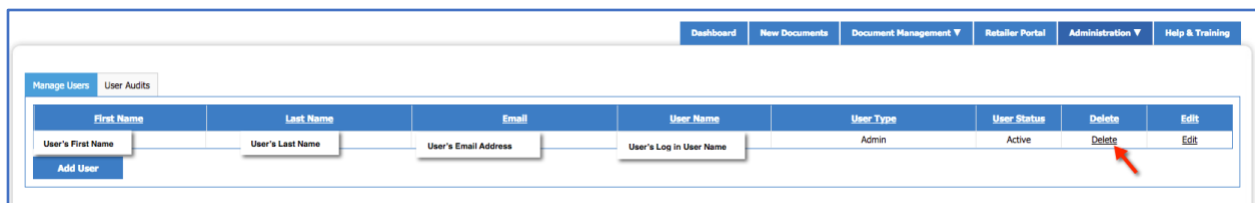
Select Save

To Edit a Current User, select the hyperlinked ‘Edit’ option in the Edit column associated to the User in the ‘Manage Users’ tab.



This option will bring you to the User’s Personal Information page, where details of their account can be altered, updated or changed.

To Delete a Current User, select the hyperlinked ‘Delete’ option in the Delete column associated to the User in the ‘Manage Users’ Tab.



Deleting a User will remove the User Account entirely

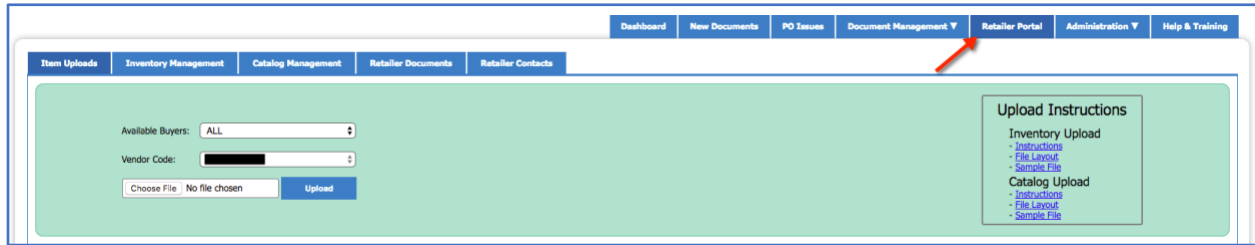
## User Audits

Dashboard							New Documents	Document Management ▼	Retailer Portal	Administration ▼	Help & Training
Manage Users		User Audits									
First Name	Last Name	Email	Phone Number	Days Since Last Login	Last Login	Status					
User's First Name	User's Last Name	User's Email Address	Contact Phone Number	0	1/2/2018 4:12:12 PM	Active					

The User Audit tab is available to Administrative Users only in User Management. This tab provides insight to each users' log in activity with how many days since their last log in and the exact date and time the user logged on last.



## Retailer Portal



The Retailer Portal provides an opportunity for Vendors to communicate available inventory information to the Retailer. This feature is available if it is a requirement of the Retailer and must be implemented and tested prior to production.

If the 846 Inventory Upload has already been approved and implemented with an ecUtopia Project Manager, available Upload Instructions are located in the “Retailer Portal” tab under “Item Uploads”. Added training requests or Support opportunities can be communicated to [Support@ecutopia.com](mailto:Support@ecutopia.com).

If your company is interested in enhancing the ecPortal with the 846 Inventory Upload, please reach out to [Support@ecutopia.com](mailto:Support@ecutopia.com) for information on whether this Feature is approved by the Retailers currently trading with you.