Admin Portal

User's Guide

Table of Contents

Admin Portal Home

As you may have noticed, some changes have happened in the EC Suite Webmaster Admin. These changes include a new and easier-to-navigate menu that we call "Mega Menus".

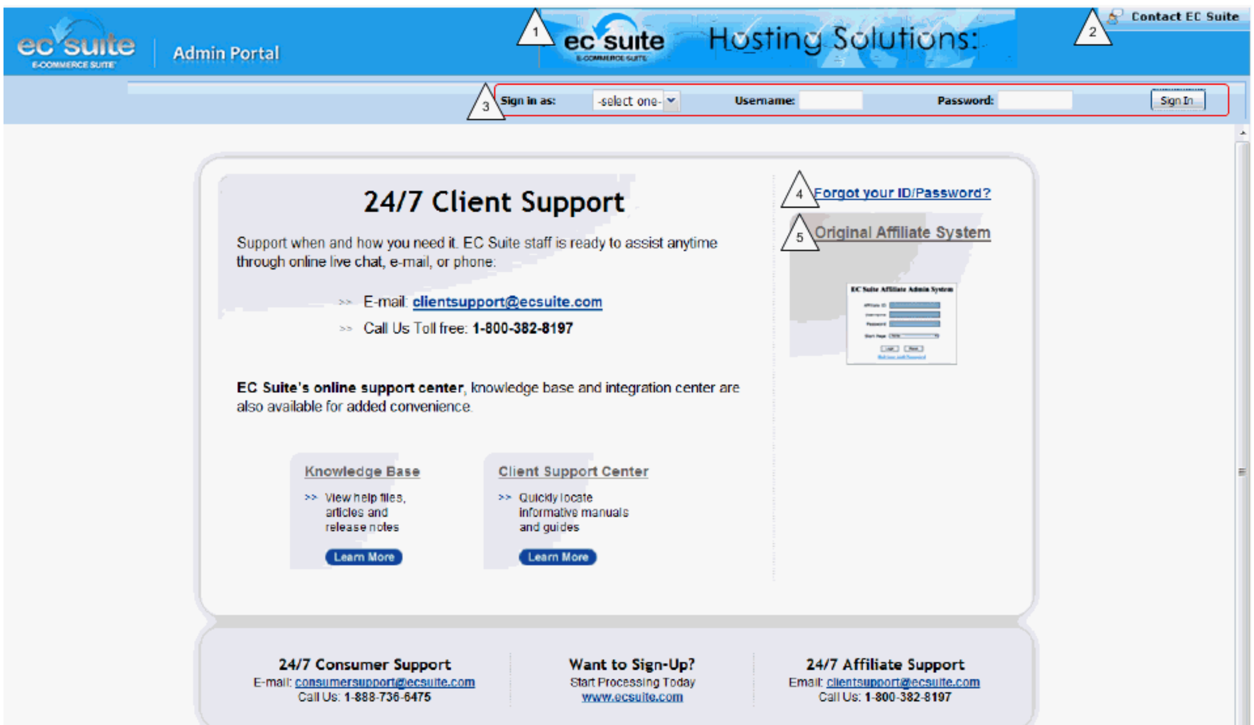
Mega Menus have brought with them a lot of changes in how both Webmasters and Affiliates log in to the EC Suite system, perform tasks, and review data. We hope to provide an overview of these in this guide and give you the tools you need to successfully navigate the new system without worry.

Accessing the Admin Portal

To see the changes we've made you first need to sign in to the Admin Portal.

Currently the new changes are available at the following link: https://admin.ecsuite.com/loginMM.cgi

You will arrive at the landing page, where you can sign in, change your password, or initiate an online chat with a Client Support Representative. See the detail list below the image for a description of each area.



1. This is a banner area. The content of this area will change on a somewhat regular basis and is typically a flash banner. Here you can often find information about EC Suite activities, new releases, or other pertinent information. This banner only appears on the Log In screen and will disappear after a successful log in.
2. Clicking on this link will present you with Contact Options for EC Suite Client Support. You may initiate a secure connection, allowing you to speak directly with a EC Suite Client Support Representative, click the email link, or obtain the Client Support phone number. .
3. This is the Sign-In area, described further in the Signing In topic.
4. The **Forgot your ID/Password** area allows you to reset your password or discover your User Name without having to contact Client Support. For more information, visit the Retrieving a Lost User Name or the Resetting Your Password topics.
5. This link will take EC Suite Affiliates to the Original, or Legacy, Affiliate System.

Signing In

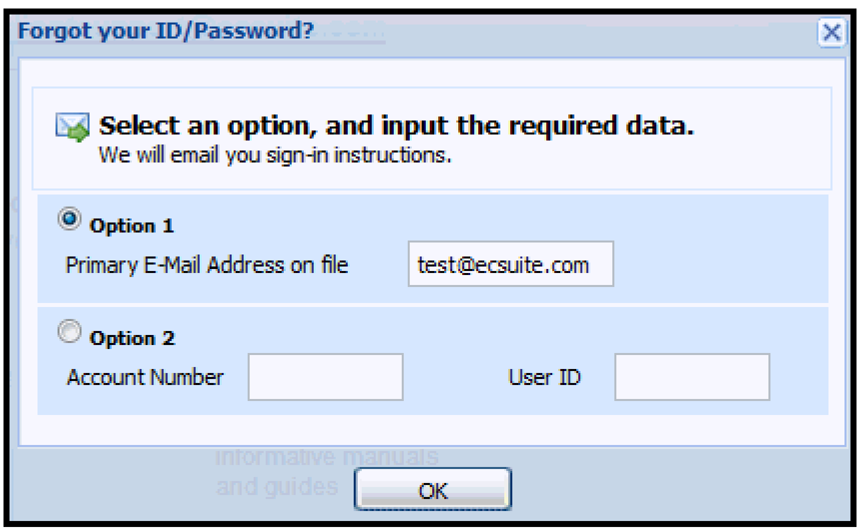
To log in to the Admin Portal:

1. Open the Sign In screen by opening this URL: https://admin.ecsuite.com/loginMM.cgi.
2. Choose Client or Affiliate from the drop-down menu.
3. Enter your Username.
4. Enter your Password.
5. Click Sign In.

Retrieving a Lost User Name

If you've forgotten your User Name (ID), you can retrieve it through the Log In screen:

1. Access the Sign In screen at https://admin.ecsuite.com/loginMM.cgi.
2. Click the **Forgot your ID/Password?** link under the Username field towards the right of the screen.
3. Choose **Option 1** and enter your **Primary Email Address on file** (the email address registered with your User Name).



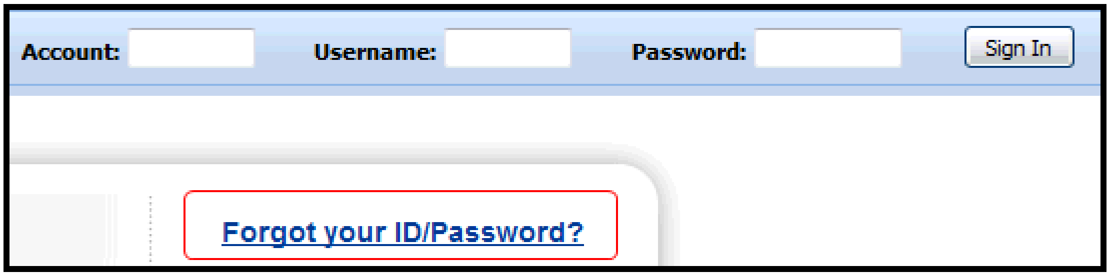
4. Click **OK**.

The system will send your User ID to your email address. After you receive this information you can proceed to log in as usual.

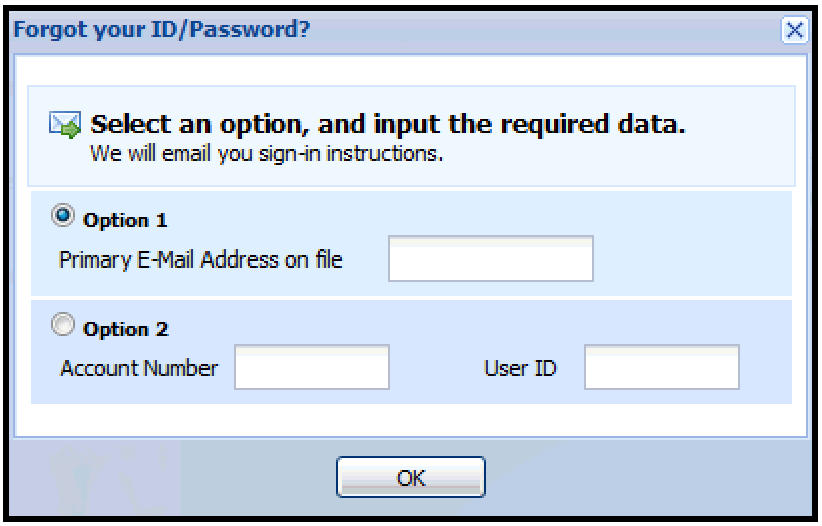
Resetting Your Password

To reset your Admin Portal password:

1. Access the Log In screen at https://admin.ecsuite.com/loginMM.cgi.
2. Click the **Forgot your ID/Password?** link under the **Username** field towards the right of the screen.



3. Choose **Option 2** and enter your **Account Number** AND **User ID** in the provided fields.



4. Click **OK**.
5. Access your email account and locate the email address sent by EC Suite Client Support (this is typically sent immediately at step 5 above, but may take a few moments to reach you).
6. Click the **Click here to update your password** link in the email.
7. Enter a new password in the **New Password** and **Re-Enter New Password** fields.
8. Click **OK**.

Client Dashboard Navigation

Client Dashboard

When you have successfully logged in to the Admin Portal, you'll see this screen:

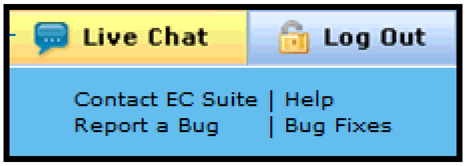
This screen is known as the Client Dashboard. Each area numbered in the image above has a different purpose:

1. Displays the User Name that you are logged in under, the Company Name, and the date and time of your last successful log in.
2. The Search area allows you to navigate between multiple account numbers and/or subaccount numbers. Numbers that you are authorized to use should be listed in the drop-down menu, choose the one that you need to access from the menu.
3. The **Contact Menu** displays the different avenues used to contact EC Suite, whether it be to submit a bug or to start a live chat with Client Support. More information can be found in the Contact Menu topic.
4. Quicklinks canbe customized for quick access your frequently used areas without having to browse the menus. For more information on setting up and using Quicklinks, see the Quicklinks topic.
5. The News area of the Client Dashboard displays any current news from EC Suite. You can view older news items by clicking the News Archive link.
6. The Quick Stats report gives you a quick snapshot of how your account is doing financially.

Contact Menu

Contact Menu

The Contact Menu is located at the top-right of any Admin Portal screen, including the Log In screen.



The following is a description of all Contact Menu functions:

1. **Live Chat**. This link opens a secure connection in a new window that allows you to speak with a member of our Client Support team. You will be asked to enter your Name and Account Number in the pop-up window to initiate the chat.
2. **Contact EC Suite**. This opens a tool-tip with the email address and phone number for Client Support if you wish to contact them via one of those methods. Click the X to close the tool-tip.
3. **Report a Bug**. If you have run into a problem in the Admin Portal or with any EC Suite service or function or you have a feature you would like to request, or you can use this link to submit that information to us so that our developers can work on it for you. See the Report Bug topic in the help for more information.
4. **Log Out**. Clicking the Log Out link will end your session and log you out of the Admin Portal. You will be returned to the Log In screen.
5. **Help**. Clicking the Help link will take you to the Help Files for the Admin Portal. This opens in a separate window.

> *Note: You may be asked if you want to view only the data sent via a secure connection. This message occurs because while our Admin Portal is on a secured server (https://), our help is not (http://). Please say "No" to this message to be able to view the help content.*

1. **Bug Fixes**. The Bug Fixes link allows you to view a list of bugs that you have submitted and see any notes from EC Suite that may exist and/or the resolution for your reported bug. View the Bug Fixes topic for more information on this report.

Report Bug

If you wish to report a bug or submit a feature request to the EC Suite developers, follow these steps:

1. From the Contact Menu, click **Report a Bug**.
2. Choose the appropriate bug type from the **Category** drop-down menu.
3. If the bug is an emergency, click the box next to **Urgent**.
4. In the **Notes** field enter as much information about the bug/feature request as you can. For example: If submitting a bug be sure to detail which screen you were on, what you clicked on just before the error occurred, what account number/subaccount number you were using, the exact text of the error message (if possible), what Internet Browser and version you were using, what operating system you use, and any other pertinent details. The more information you provide the easier it will be for our developers to reproduce the issue.
5. Click **Submit Bug** to send the bug to our development queue.

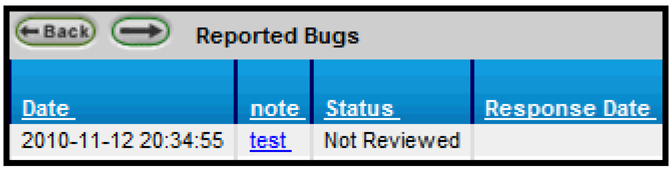
Bug Fixes

The **Bug Fixes** report allows you to view a list of bugs, reported by you, and view their status.

From the **Contact Menu**, click **Bug Fixes**. The report is run automatically; no date ranges or other criteria need to be entered.

Use the arrow buttons at the top- or bottom-left of the report to move backwards and forwards through the pages in the report. The report defaults to 25 items per page, though you can change that setting by choosing a different number in the **Items Per Page** drop-down menu at the lower-right side of your screen.

- The **Date** column shows the date and time that you submitted the bug.
- **Note**. This is the text that you entered in the bug when you submitted it.
- The **Status** column tells you if the bug has been reviewed, approved, rejected, completed, etc.
- The **Response Date** column tells you the date and time the bug was closed or completed.



Account Menu

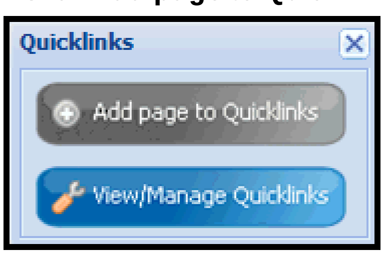
The Account Menu is used to choose between your sub account numbers when in the Admin Portal. To change sub accounts, use the drop-down menus to first choose the account number (left) and the subaccount number (right). The screen will automatically refresh with the newly selected information.

Quicklinks

The Quicklinks function has been updated to make it easier to use in the Admin Portal. Additionally, there is no longer a limit on how many items you can store in your Quicklinks. The Quicklinks menu is used to add or remove pages to/from the Quicklinks menu, and navigate to a page in the Admin Portal that was previously added to Quicklinks.

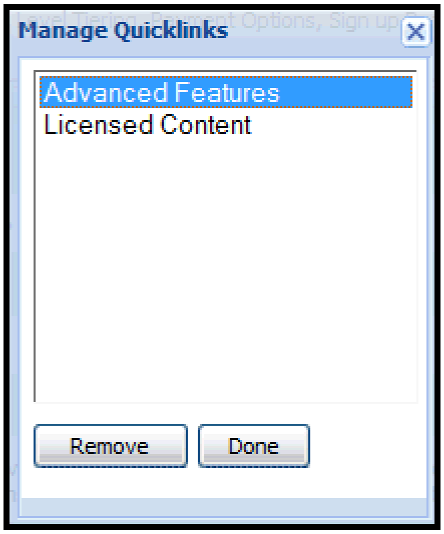
To add a new page to the Quicklinks menu:

1. Navigate to a page in the Admin Portal that you want to add to Quicklinks.
2. Click the Quicklinks button (labeled 1 above).
3. Click **Add page to Quicklinks**.



To remove a link from the Quicklinks menu:

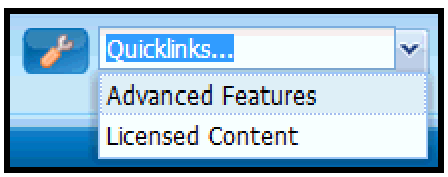
1. Navigate to a page in the Admin Portal that you want to add to Quicklinks.
2. Click the Quicklinks button (labeled 1 above).
3. Click **View/Manage Quicklinks**.



4. Click to highlight the link you want to remove from the Quicklinks menu.
5. Click **Remove**.

To navigate to a link in your Quicklinks menu:

1. In the Quicklinks area, click the drop-down menu that says **Quicklinks...**.
2. Click to select the Admin Portal area you want to jump to.



News Archives

From the News area, click the **News Archives** link to view past news posts.

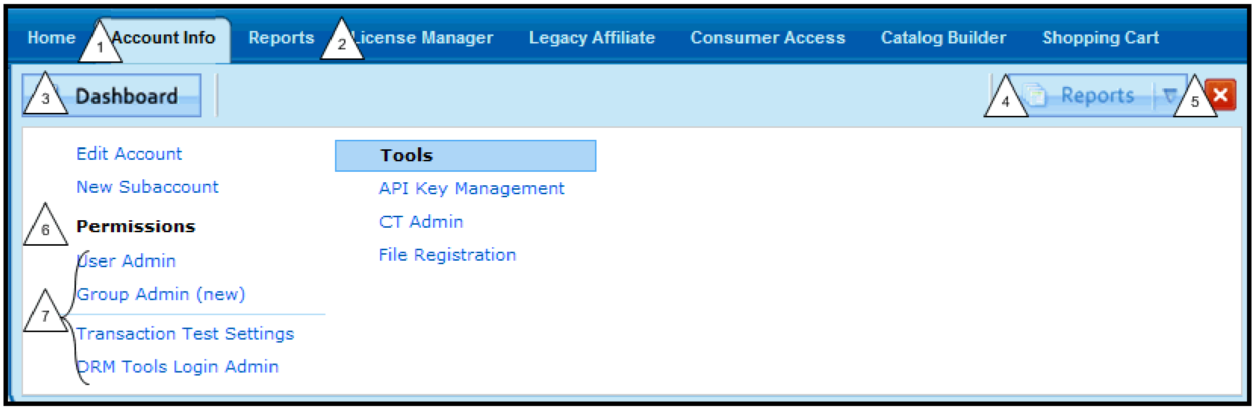
To List News:

1. Select a date range using the Date Lookup pane.
2. Select one or more **Area**s (such as All, Home, Reports, Tools, or Affiliates)
3. Select one or more **Type**s:
    - **All.** Review all system news.
    - **Alert.** Review news items that are advisory in nature.
    - **System.** Review news items pertaining to the Admin System.
    - **Webmaster.** Review news items written for clients.
4. Click **List News** to display the News report and review the selected news information.

Mega Menus

A **Mega Menu** is a large and fully-detailed menu that displays all associated sub-links without having to cascade down through categories. The menu stays active until you close it or toggle to a different menu. The switch to Mega Menus should help facilitate navigation and decrease frustration with the old-style menus.

Let's go over the components of the Mega Menu and identify the important features.



1. This is an **Active Tab.** You'll notice that the menu title is surrounded by a lighter-blue tab similar to the tabs you see in filing cabinets. This shading helps you to identify the tab you are currently browsing. To open another tab you may either close the tab (number 5) or simply click a different Menu Title.
2. This is a menu title in an inactive state, or an **Inactive Tab**. The shading is a darker blue color and there is no border between the inactive menu titles. All menu titles should be in this state if they are not in use. To open an Inactive Tab simply click any Menu Title.
3. The **Dashboard** button can be pressed from ANY Active Tab. This button will take you back to the Dashboard in its neutral state with no menus active and the Quick Stats report displayed.
4. The **Reports** drop-down is only available from some Mega Menus. The state in the image above means that there are no reports available on this tab. If reports are available, the word **Reports** will be black instead of blue.
5. The red box with the white x in the middle is the close button. Clicking this button enables you to close the menu.
6. The text indicated at number 6 is **bold** text with blue highlighting behind it. This indicates a Main Menu Heading. This is essentially a category within the Menu Title that helps to contain links to similar tasks, thus making them easier to locate. These are typically not links, but merely a container for similar links.
7. The blue links are links to tasks contained in the Main Menu Headings. These are ultimately where you are trying to go in the Admin Portal.

Almost all of the Mega Menus are similar to what is described above, the exception being the **Reports** tab. Reports navigation has been enhanced in other ways and is further described in the Report Navigation topic.

Menu Behavior

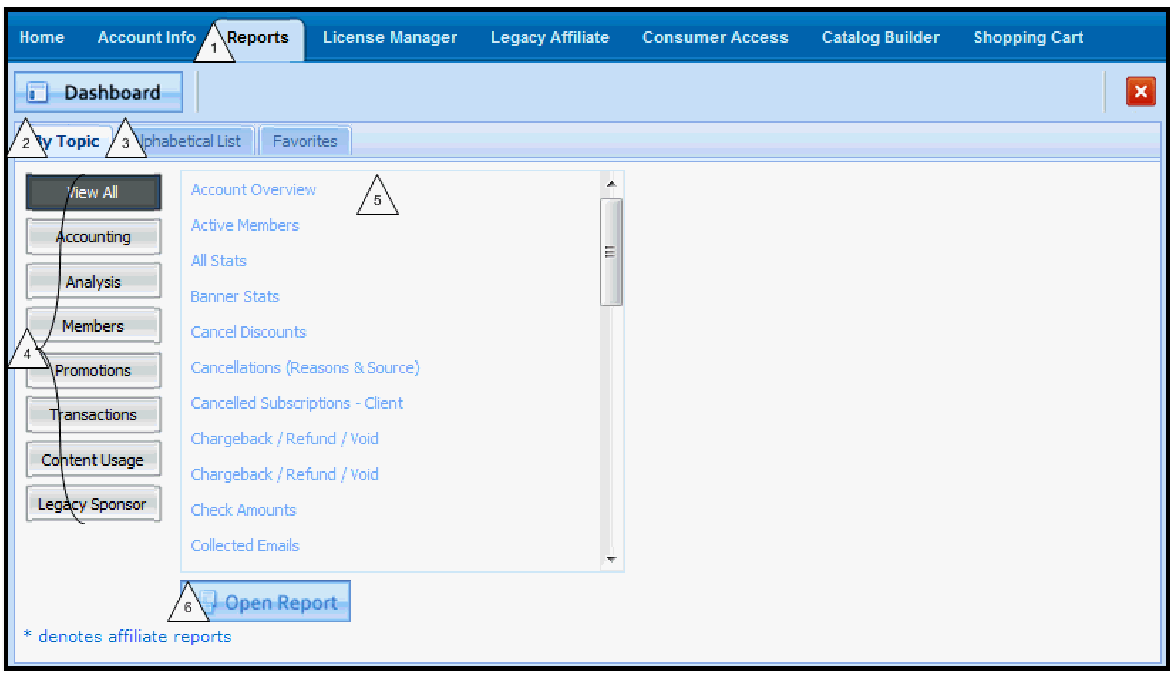
- To activate a Menu, hover over the Menu Title for approximately 2 seconds.
- Stopping the hover deactivates the menu.
- Clicking the Menu Title will also activate a Menu Title (without the off-hover close ability).
- Click the red **X** to close the menu.
- Hovering over an object (link, icon, etc.) in a menu will display a brief description of the item at the top of the Mega Menu.
- Mega Menus are often divided into sections to group like tasks/icons together.
- Any given user may have access to all or some of the mentioned links or icons, depending upon their permissions. For example, an Affiliate may see a link to a Client function, but not be able to load the function because it is not available to them.
- A **New** or **Updated** icon may display next to a link as a way to indicate a newly added feature or service.

Report Navigation

For your convenience, Mega Menus moves ALL reports onto one tab. Report links exist as well under other Mega Menus, but those are there for convenience. The **Reports** Mega Menu gives you access to every available report based on your permissions.

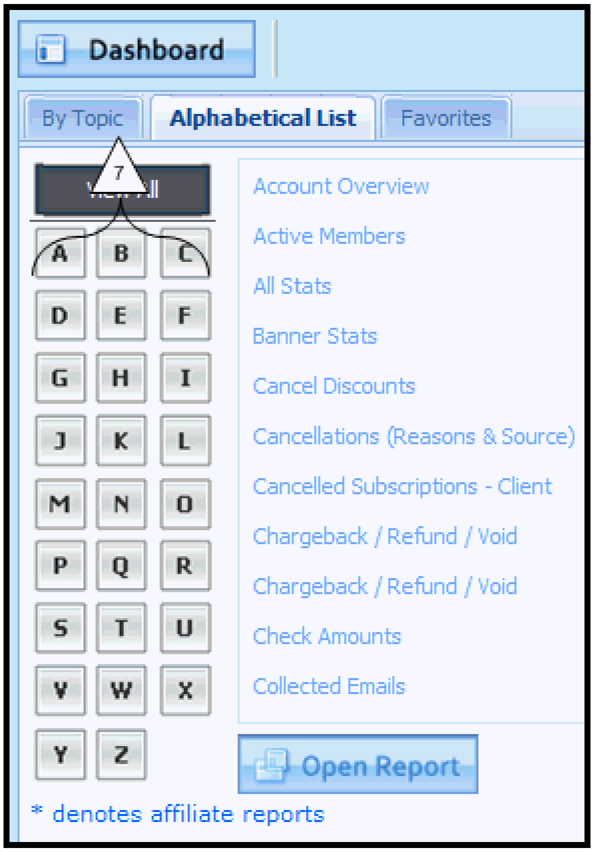
Reports are now navigable by Topic, Alphabetically, and as Favorites.

Clicking on the **Reports** Menu Title will give you a Mega Menu that looks similar to this:



1. The **Reports** Menu Title.
2. The **By Topic** tab displays the Topic Grouping (4), allowing you to choose a topic and view all available reports in that group.
3. The **Alphabetical List** tab displays a mock-keyboard (7, below) that allows you to select a letter and view all reports with a name that begins with that letter.
4. The **Topic Group** contains topic buttons. Selecting one of these buttons will display all associated and available reports for that topic group.
5. The **Results Pane** displays the results of your applied alphabetical or topic filters.
6. The **Open Report** button opens the report selected in the Results Pane.

7. The **Keyboard** displays when the Alphabetical List (3) is active. Selecting a letter on the keyboard will display all reports with a name that begins with that letter.



Browse Reports by Topic

To locate a report by topic:

1. Click to select the **Reports** Menu Title.
2. On the Mega Menu click to select the **By Topic** tab.
3. Click the **Topic Name** that you wish to filter by in the Topic Group list.
4. Click to select the report you want to view from the **Results Pane**.
5. Click **Open Report**.

Browse Reports Alphabetically

To locate a report alphabetically:

1. Click to select the **Reports** Menu Title.
2. On the Mega Menu click to select the **Alphabetical List** tab.
3. Click the letter that you wish to filter by in the keyboard list.
4. Click to select the report you want to view from the **Results Pane**.
5. Click **Open Report**.