QUICK START GUIDE

EC Suite

Contents

Introduction

Welcome to EC Suite!

The purpose of this Quick Start Guide is to give you a brief overview of all of the services that we offer and how to quickly get up and running with your new services. In this guide we do not give you step-by-step instructions, but strive to give you a quick overview as well as access to other resources for more in-depth instruction.

If you find that you need more detailed information than what this guide provides, please visit our online help center at www.ecsuite.com/cs. There you will find a full and detailed help file as well as other guides and manuals that can help you with setting up specific features.

Please keep in mind that you may not be subscribed to all of the features listed in this Quick Start Guide. If you do not subscribe to a feature, simply skip to the next section.

Support

If at any time you find that you need help with anything, please contact our support department. Our contact information can be found on both the first and last page of this document.

Contracts

Your Sales Representative will walk you through the contract process. During this phase, you will choose the services that are right for your business and fill out all of the appropriate paperwork to get those services started for you. Once everything is complete you will be sent a Username and Password for the EC Suite Admin. Your Sales Representative will still remain a valuable asset to you throughout your relationship with EC Suite and can help you tweak your services when necessary.

EC Suite Admin

Everyone who uses EC Suite will first need to log in to the Admin area. You can find the EC Suite admin on the Web at https://admin.ecsuite.com.

After logging in to the EC Suite Admin, you'll want to take a few moments to familiarize yourself with the Admin area. Some menu items mentioned in this guide may not be there, depending upon the service package you chose during the contract process. Should you wish to add them later, simply contact your Sales Representative.

Account Administration

To manage your account transaction processing, go to the **Account Info** menu in the Admin, then click **Edit Account**. From here, you can manage the sign-up process and pricing options by using the following tools, accessible from the left-side navigation:

Form Admin

This area allows you to create new sign-up forms, manage existing forms, and generate HTML for your forms. To set a form, follow these steps:

1. Click **Form Admin** from the left navigation.
2. Click **Create Form**.
3. Select a billing type, form type, layout and theme.
4. Configure additional settings as desired, save changes by clicking **Submit**, and then click **Generate HTML**. This code must be added to your site to display the form.

To manage forms once they have been created, click the **View Forms** link inside the Form Admin and click the name of the form you wish to modify. Changes will be saved when the form is reset. Do this by following the **Reset Forms** link inside the Form Admin.

Pricing Admin

This area allows you to create pricing structures for program subscriptions. To create a pricing option, do the following:

1. Click **Pricing Admin** from the left navigation.

2. Select a billing type from the drop-down list.

3. Click the **Create** button.

4. Fill in required fields and click the **Insert** button to create the pricing option.

5. Click the provided link to reset your forms.

6. Generate new HTML from the **Form Admin** and paste the new code into your site to display the form.

Users will now be able to select the pricing options you just created from the form.

Custom Emails

Customized email notifications can be set for approval, denial, cancellation, failure, and affiliate sale notifications. To customize an email, follow the steps below:

1. In the **Email for Subscription** Notification field, enter the primary address where client emails will be sent. All client email for the current subaccount will be sent to this email address. To send to multiple addresses, see below.

2. Click the **Customize** link next to the email you wish to modify.

3. Fill in the **From** and **Subject** fields.

4. Select the preferred **Format** of the email. Emails can be HTML and text or text only.

5. If you wish for the email to also be sent to other addresses, you may add a new address under the **BCC** field at the bottom of the customization form. Click the **Add Email** button to add the new address to the list, and click **Save** when finished.

Reports

To view account transaction reports, click the **Reports** menu in the Admin area. A list of all reports appears alphabetically

Affiliates

EC Suite's Affiliate System allows for mutual business partnerships in affiliate advertising and revenue sharing. To get started, follow the outline below.

Setting Default Signup Options

To set the default options for a newly signed up affiliate, go to the **Legacy Affiliate** menu in the Admin area, and click **System Setup**:

1. Set a **Redirect URL**. This is the URL that users will be directed to when they click on your banner that has been placed on an affiliate's Web site.

2. Set **Banner URLs**. These are URLs where banner graphics are stored. Up to ten banner locations can be specified.

3. Set **Payout** amounts. Here you will be able to specify **Telephone Billing Percent Payout**, **Base Percent Payout**, and **Base Dollar Payout**. These amounts specify how much an affiliate is paid for each referral.

4. Set the **Recurring Payment** option. Select **Yes** if you wish to give a portion of recurring payments to referrers; otherwise select **No**.

5. Set email options. You will be given the option to receive an email for each sale or affiliate signup, as well as to send a welcoming email to newly signed-up affiliates.

6. Enter a **Program Name**. This is simply a name for your Affiliate Program. The system uses a default name when none is entered.

7. Set **Click Tracking** options. You can decide what sort of click information to track, such as raw and unique clicks. Use the appropriate check boxes to decide which method of click tracking should be used.

8. Select which type of click tracking should be viewable by affiliates.

9. Click the **Update** button to save your changes, or click **Reset** to restore the form to its previous values.

Creating a Form

To create an affiliate signup form, go to the **Legacy Affiliate** menu and click **Signup Template** in the Setup area. Once there, follow these steps:

1. Copy the HTML code inside the given text window into a text editor and modify the layout as desired. Field names and maximum lengths must remain intact.

2. You will also be able to skin the long signup form that the **Create New Account** button leads to by using hidden fields that are already placed within

the original form's HTML code. For detailed instructions, see the HTML comments area of the original form.

3. When finished, save the document as an HTML file and upload it to your server. Affiliates can now use this form to sign up under your program.

Affiliates can also use this form to log in and view statistics relating to their own performance in your program.

Affiliate Administration

Once you have one or more affiliates signed up under your program, you can use the **Administration** section of the **Legacy Affiliate** menu to manage your affiliates. For example, to edit payout amounts, do the following:

1. From the **Legacy Affiliate** menu, click **Affiliates**.

2. Fill out the form to the left to locate a particular affiliate.

3. Click the **Edit Payouts** link for that affiliate.

4. Edit the payout information as desired, and click the **Submit** button to save your changes.

For more information on managing affiliates, follow the **Help** links on each page.

Reports

To view affiliate reports, click the **Reports** menu, and then click on the **Legacy Affiliate Reports (Client)** tab:

- **All Stats:** In this area you will have the option of viewing transaction and conversion data, as well as click tracking information.

- **Banner Stats:** This report shows the number of clicks each of your banners has received.

- **Transactions:** This section displays data for all transactions including trials, single billings, recurring billings, rebills and chargebacks.

- **Sales Per Click:** This report will break down per-click sales for each affiliate, including raw and unique clicks.

- **Referred Affiliates:** This report shows payout data for your affiliates over the last seven days, including the types of sales and other transactions.

- **Referring URLs:** On this page, you will see a breakdown of which URLs are directing traffic to you and which affiliate is associated with that URL, as well as how many sales have been generated on your site though that traffic.

- **Page Views:** This report shows the total number of raw and unique clicks for each page on your site.

For more information about reports, please see the **Help** links on each page.

Catalog Builder

The EC Suite **Catalog Builder** provides a point-and-click method of creating an online catalog for your store front. Select the **Home -> Catalog Builder** link inside the Admin area to begin.

New Store Builder

Click the **Catalog Builder** link in the **Home** menu, and then click **New Store Builder Wizard** to start setting up your store. This wizard will step you through the process of selecting a visual template, color scheme and header graphic, as well as entering contact information and information about the store. You can also edit the shopping cart, define the site's URL and preview the site. The shopping cart feature is explained in detail below.

Categories

Once your store is set up, you will be able to separate your items into different categories and subcategories. To do this, click the **Manage Categories** link on the **Catalog Builder** page.

Products

Following the **Products** link on the **Catalog Builder** page will allow you to add new products to your catalog, as well as view and edit existing products. You will also have the option of defining **Featured Products**, which will highlight specific products in the catalog.

Editing Your Store Front

To edit any of the above information, click the **Edit Your Store Front** link on the **Store Front** menu. This functionality is similar to the **New Store Builder Wizard**, and any setting can be modified at any time.

> *NOTE: You do not have to use the Catalog Builder in order to utilize the shopping cart functionality.*

Shopping Cart

The **EC Suite Shopping Cart** allows a simple, secure shopping experience for users. Follow the outline below to implement the shopping cart.

Shopping Cart Setup

Begin by clicking the **Home -> Shopping Cart** link in the Admin area. At this point you will be able to skin the shopping cart by selecting a header graphic and color scheme. You will also be prompted for a Return URL; this is where users will be redirected once the transaction is complete. **Download Manager** can also be set up at this time.

Download Manager

Download Manager is an applet that runs either inside the user's browser or natively on the user's computer. Users will be able to pause, resume, and view the current status of their individual downloads.

Page Options

The **Page Options** link will allow you to customize customer notification emails as well as preview the site. The site preview shows exactly what customers will see when they visit your online store.

Status Code

Status Code will be generated using the link at the bottom of the **Shopping Cart** page. This code must be copied and pasted into the shopping cart source file in order to track the status of customer orders.

IMPORTANT: The Shopping Cart will not work properly without this code.

More Information

Online help is available on each page inside the Admin area, and documentation can be found at http://www.ecsuite.com/cs/. You can also contact our Client Support department directly by email at clientsupport@ecsuite.com, or by phone at 1-800-467-0253.