

## ESP Websites - Global Features

Tamika C - 2020-12-22 - Global Features

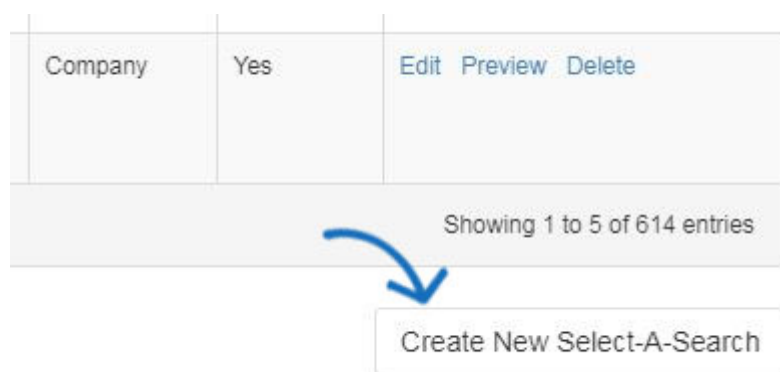
The Global Features area enables you to manage options and functions that can be any site in the ESP Admin.

From the Global Features dropdown, you can access these options:

### My Saved Searches

Saved Searches, also referred to as Select-A-Searches, are links to already established searches. The links act as shortcuts to predetermined product searches, like "caps & hats."

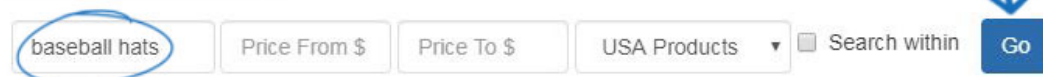
To create a new Select-A-Search, click on the "Create New Select-A-Search" button, where you can use the ESP Web Quick Search to create your searches.



Type your search criteria using keywords into the search field and click Go. After you've completed your search, you will need to save it

After you have narrowed your search, you will need to save it.

### Quick Search



baseball hats Price From \$ Price To \$ USA Products Search within Go

**Note:** You can further refine your search by using the Narrow Results area under the "Your Search Terms" box.

To save this search, click on the **Save Search** button.

Your Search Terms

Search Terms

☒ baseball hats

[Clear All](#)
[Save Search](#)

A window will open where you can name the search. After naming the search, click on the Save link.

Save your Select-A-Search

[Save](#)

Name ▲	Actions
--------	---------

You can see a confirmation that this Select-A-Search has been saved successfully and has been added to your list of already existing select-a-searches. Click the "X" to return to the search area.

Save your Select-A-Search

☒ Save Search Successfully created new Select-A-Search

[Save](#)

Name ▲	Actions
--------	---------

Repeat the steps above to add more select-a-searches to your ESP Website. Once you are finished, click on the "Return to [Features – Select-A-Searches]" link.

Run a Quick Search and narrow down your results are satisfied with your search criteria and products

[Return to Select-A-Search](#)

13,474 item(s) from 566 supplier(s) are found for "baseball hats"

Your Search Terms

After you have created your Select-A-Search, you can add it as a [link in navigation](#).

## Coupon Manager

In the Coupon Manager section, you can edit, copy, or delete already existing coupon codes, or create new ones. Within the Coupon Manager, all existing coupons will be listed. Use the search bar to help you locate an already created coupon or click on any heading to sort in an ascending or descending alphanumeric order.

**Note:** Discount Value and Order Minimum are not clickable columns for sorting.

To delete, copy, or edit an existing coupon, select the option using the dropdown in Actions column.

- Edit: Will open the coupon properties and you will be able to update the information.
- Copy: Will create a new coupon using the information of the original one.
- Delete: Will remove the coupon.

Coupon Manager

Create coupons to use for promotions or special offers on your websites.  
To enable coupons for a website, go to eCommerce / Check-Out and Order Management.

+ Create a Coupon

Search

Code	Name	Start Date ▾	Expiration Date	Discount Value	Order Minimum	Level	Actions
NewYears	New Years S...	1/1/2019	1/31/2019	19%	\$100.00	Company	Edit ▾

## Creating a New Coupon

To create a new coupon code for your site, we can click on the Create New Coupon button.

Coupon Manager

Create coupons to use for promotions or special offers on your websites.  
To enable coupons for a website, go to eCommerce / Check-Out and Order Management.

+ Create a Coupon

Search

Code	Name	Start Date	Expiration Date	Discount Value	Order Minimum	Level	Actions
------	------	------------	-----------------	----------------	---------------	-------	---------

In the Create A Coupon window, enter the desired information into the required fields. The required fields are:

- **Coupon Code**  
This is the code shoppers will enter during the checkout process on your site.
- **Coupon Name**  
The Coupon Name will be searchable in the Coupon Manager.
- **Description**  
This information will not be shown on your ESP Website or Company Store, but is for your reference and not a required field.
- **Start and End Dates**  
These dates will help determine when the coupon will be active on your ESP Website or Company Store.
- **Discount Value and Discount Type**

Type the discount value and then use the Discount Type dropdown to select Amount Discount or Percent Discount.

- **Order Minimum**

Enter the minimum amount necessary for this coupon to be applicable.

- **Level**

The level will determine the visibility of this coupon information to users within your company.

When you are finished entering the specifications for the new coupon, click on the Save button.

Create a Coupon

Code\*

SAVE21

Name\*

2021 Promo

Description

Customers can use code to get 21% off all orders of \$2000 or more placed during the month of January 2021.

Start Date\*

01/01/2021

Expiration Date\*

01/31/2021

Discount Value\*

21.00

%

Discount Type\*

Percentage Discount

▼

Order Minimum\*

\$

2000.00

Level

Company

▼

Cancel

Save

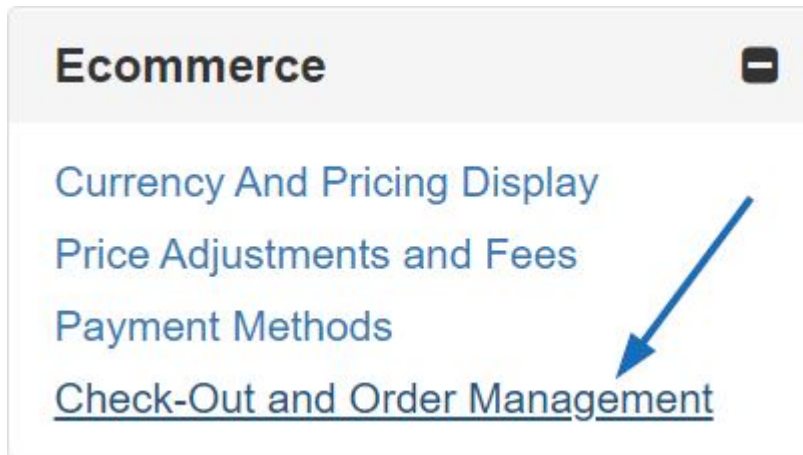
The new coupon will now be added to the Coupon Manager list. The coupon code will be active from the start date until the end date.

### Enabling Coupon Acceptance

After locating your site in the My Sites area and clicking on the Edit Site button.



Expand the eCommerce section. Then, click on the Check-Out and Order Management link.



Go to the Coupon & Points Options section and check the Accept Coupons checkbox.

## Coupon & Points Options

☒ Accept Coupons ☐ Accept Company Points

## Custom Products

The custom products area will open and display all available custom products. There are two ways to create a custom product:

- *Search & Copy*: Enables you to search for product that is already listed on ESP and customize the product information.
- *+ Add a New Product*: Add your own product data into a blank template. [View a webinar on how to add and apply a custom product.](#)



## Customize an Existing Product

To modify an existing product, click on the Search & Copy button. Use the ESP Web Quick Search bar to enter keywords, a product name or a product number. Use the Narrow Results

section to refine your search results and locate the particular product you are looking for.

11,258 item(s) from 655 supplier(s) are found

for "ceramic mug"

**Your Search Terms**  
  
**Search Terms**  
☒ ceramic mug  
  
[Clear All](#)  
[Save Search](#)


**Narrow Results**  
  
▶ **Category**  
  
▶ **Price**  
  
▶ **Market**  
  
▶ **Supplier**  
  
▶ **Preferred Products**


Clipboard (0) ▼    Marked Items ▼


Summary View    Tile View

10 20 30 1 | 2 | 3 | 4 | 5 > >>

Items per Page

☐ DWUS7102 11 oz...  
  
Price  
1008 @ \$2.30  
**asi/12345**  
ASI Supplier Company  
[Add to Clipboard](#)  
[Create Custom Product](#)

☐ DWUS8017 14oz ...  
  
Price  
1008 @ \$4.74  
**asi/12345**  
ASI Supplier Company  
[Add to Clipboard](#)  
[Create Custom Product](#)

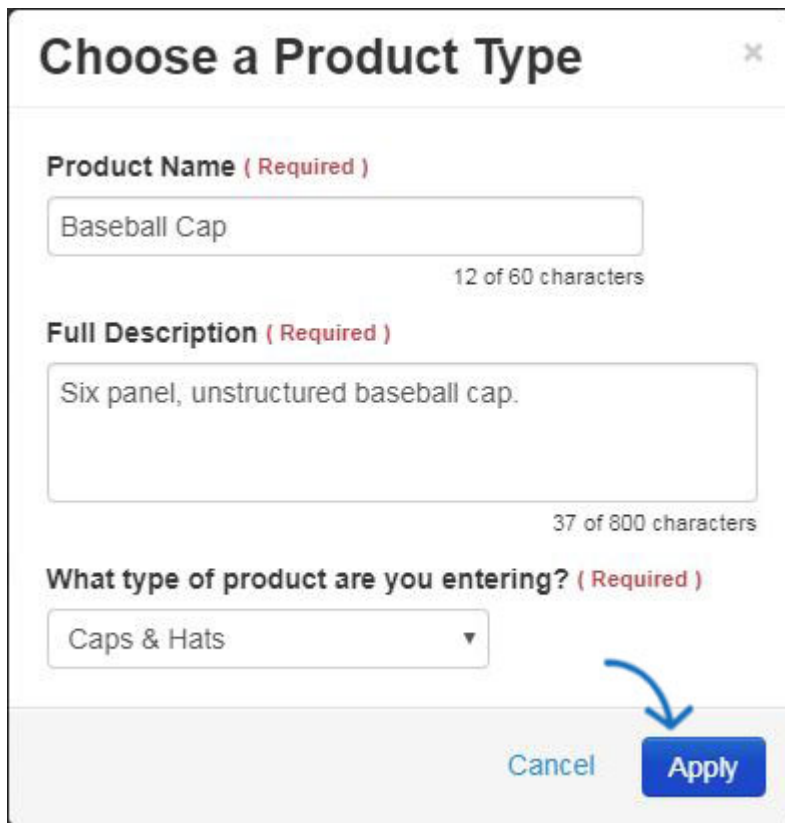
☐ DWUS1203 Two-...  
  
Price  
1008 @ \$3.63  
**asi/12345**  
ASI Supplier Company  
[Add to Clipboard](#)  
[Create Custom Product](#)

### Building a Custom Product

Click on the + Add a New Product button from the Custom Products Manager.

A window will open prompting you to enter a Product Name, Product Description and Type of Product. Type the Product Name and Product Description in the available boxes. Use the "What type of product are you entering" dropdown to select a product type.

Once you are finished entering information, click on the Apply button.

The image shows a modal window titled "Choose a Product Type" with a close button (X) in the top right corner. The form contains three main sections: 1. "Product Name ( Required )" with a text input field containing "Baseball Cap" and a character count "12 of 60 characters". 2. "Full Description ( Required )" with a text area containing "Six panel, unstructured baseball cap." and a character count "37 of 800 characters". 3. "What type of product are you entering? ( Required )" with a dropdown menu showing "Caps & Hats". At the bottom right, there is a blue "Apply" button with a blue arrow pointing to it from the left, and a "Cancel" button to its left.

The Basic Details area will open and you can begin entering information about this product in the available sections:

- [Basic Details](#)
- [Attributes](#)
- [Imprinting](#)
- [Pricing](#)
- [Images](#)
- [SKU & Inventory](#)
- [Availability](#)
- [Summary](#)


To watch a tutorial on how to add this information, please review the webinar below.

## Content Library

To create new content for use on your ESP Websites and/or Company Stores, select Content Library from the Global Features and click on the "Add New Content" button or tab to create a content block.

## Content Library

Library

[Add New Content](#) 

☐ Show ASI Content

Library Items

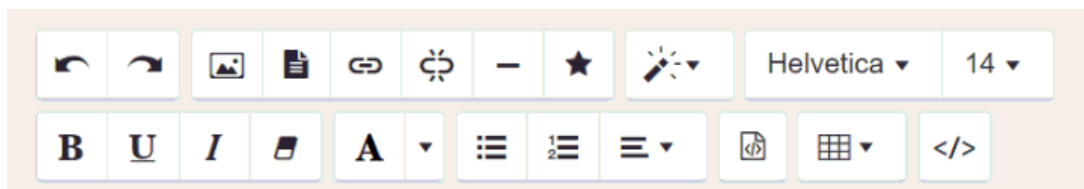
Search:

Show 10  entries

No data found

 [Add New Content](#)

After you've clicked the "Add New Content" button or button, you can begin entering information. The editor will open in a "WYSIWYG" format, meaning What You See Is What You Get. This means that you can add images and content directly in this window and edit how it looks using the available options. If you are familiar with HTML code, you can use the code editor option to update content as well.



Enter WYSIWYG content here

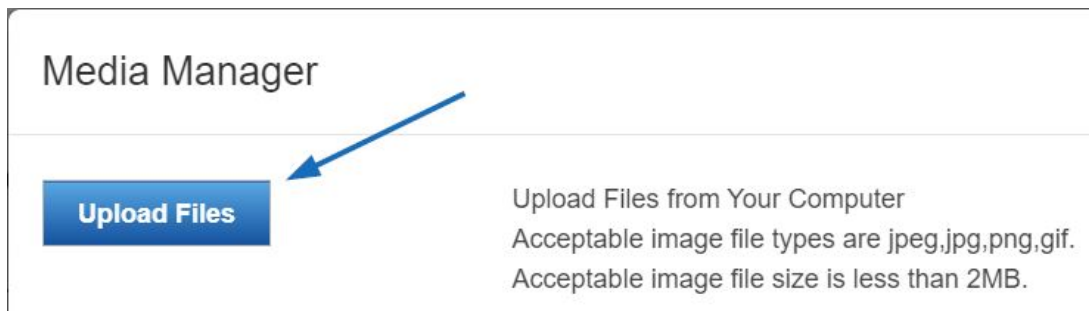
### Adding Images

To upload an image to your content, click the camera icon from the toolbar.





The Media Manager will open. All previously uploaded images from all users in your company will be available in the Media Manager. To upload a new image, click on the Upload Files button, navigate to your image, select it and then click on Open.



Your image will be added to the Media Manager. Hover on the image and click Select File to add it to your content.




You can repeat this process to upload multiple images. When you are finished making your changes, click on the Save button at the bottom right side of the editor.

### Properties

The properties box on the right is where you can enter the title for your content. You have the option to attach your content to specific Categories and Markets, but this is optional. You can select a level and then enter a release date. The release date will indicate when this content will become available. If at a later date, you no longer want the content to display, you will need to either edit your release date or remove the content from your web page.

**Properties**

**Title\***

Company Update

**Categories**

☐ Blog

☐ Case Study

☒ News

☐ Overview

**Markets**

☐ Automotive

☐ NonProfit


☒ Default

☐ Education


☐ Financial

☐ Healthcare

**Level**

Company 

**Release Date\***

01/01/2021

After you've finished making changes, click on the Save button under the content window.

Once you have finished creating and saving, you can apply this new content to your ESP Website or Company Store.

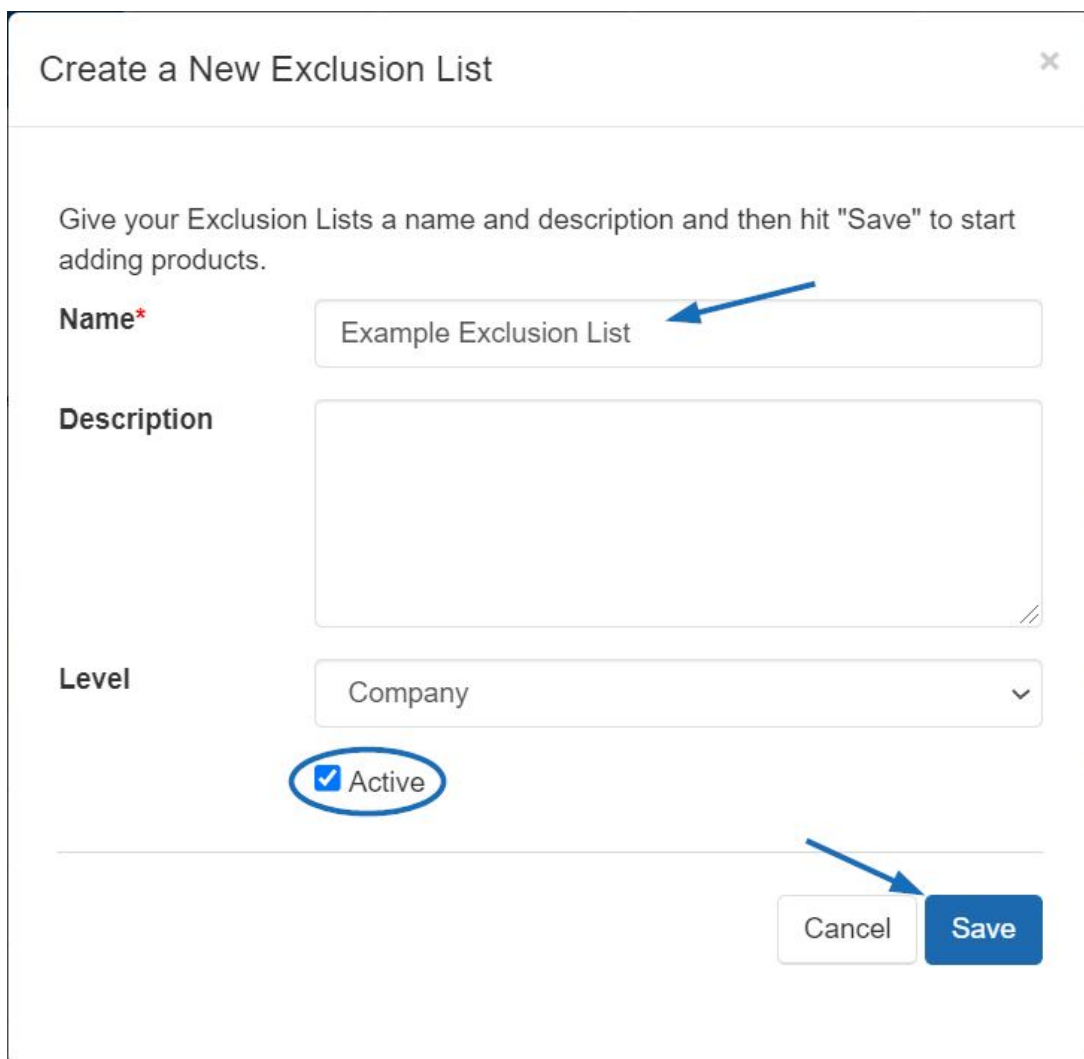
To apply your content to your site, expand the Pages & Menus by clicking on the plus button and then click on the [Advanced Page Manager](#) link.

**Note:** To close the menu, click on the minus button.



## Exclusion Lists

To create a new exclusion list, click on the "Create a New Exclusion List" button. Then, fill in the required fields in the Create a New Exclusion List box.

A screenshot of a 'Create a New Exclusion List' form. The form has a title bar with a close button (X). Below the title, there is instructional text: 'Give your Exclusion Lists a name and description and then hit "Save" to start adding products.' The form contains three main input fields: 'Name\*' with the value 'Example Exclusion List', 'Description' which is empty, and 'Level' with a dropdown menu showing 'Company'. Below these fields is a checkbox labeled 'Active' which is checked and circled with a blue oval. At the bottom right of the form are two buttons: 'Cancel' and 'Save'. A blue arrow points to the 'Save' button. Another blue arrow points to the 'Name\*' field.

After clicking on Save, you will automatically be taken into the ESP Web Quick Search,

where you are able to search for products to add to your exclusion list.

After you have completed your search, mark the items you would like to exclude from your site. You can mark up to 100 items at a time. After you have marked the items, click on the Marked Items dropdown. You can select to add the marked products to an existing list or to the current list

The screenshot shows the 'Marked Items' dropdown menu with three options: 'Add marked products to Clipboard', 'Clear all marked products', and 'Add to Current Exclusion List'. A blue arrow points to the 'Add to Current Exclusion List' option. Below the menu, there is a table of products with columns for selection, product name, image, price, and actions.

	Clipboard (0) ▼	Marked Items ▼			
	Summary View	Add marked products to Clipboard Clear all marked products Add to Current Exclusion List			
10 20 30 1					Items per Page
<input type="checkbox"/>	CM1216 T-Shirt	<input checked="" type="checkbox"/>	CM1216 Ceramic...	<input checked="" type="checkbox"/>	CM1216 Ceramic...
Price 1 @ \$20.00 <b>asi/88465</b> ASI Tech Training Add to Clipboard Create Custom Product	Price 36 @ \$4.00 <b>asi/88465</b> ASI Tech Training Add to Clipboard Create Custom Product	Price 36 @ \$4.00 <b>asi/88465</b> ASI Tech Training Add to Clipboard Create Custom Product			

When you are finished adding to your list(s), click on the Return to [Features - Exclusion Lists] link.

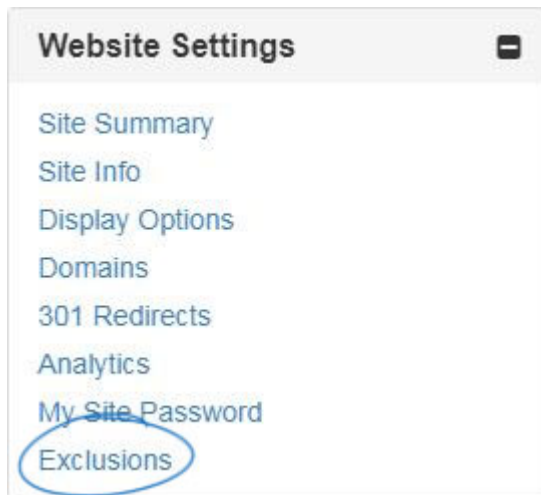
On the Exclusion Lists page, click on the Save button under Properties to save the list with the products you've selected.

### Apply An Exclusion List

You will need to apply this exclusion list. To do this, click on My Sites from the Management Toolbar, then locate your site and click on the Edit Site button.

The screenshot shows the eCommerce Platinum management interface. At the top, it displays the date and time '02/15/2023 09:55:37' and the text 'WEBSITE'. Below this, there is a 'Company Logo' section with a placeholder image. To the right, the text 'eCommerce Platinum' is displayed, followed by the URL 'https://promocompany.espwebsite.com (1FJG)'. Below the URL, there are three buttons: 'Edit Site', 'Stats', and 'SEO'. The 'Edit Site' button is circled in blue. At the bottom, there is a row of social media icons for Facebook, Twitter, LinkedIn, YouTube, and others.

Click on the plus button to expand Website Settings and then click on Exclusions.



**Note:** To close the menu, click on the minus button.

In this area, you can:

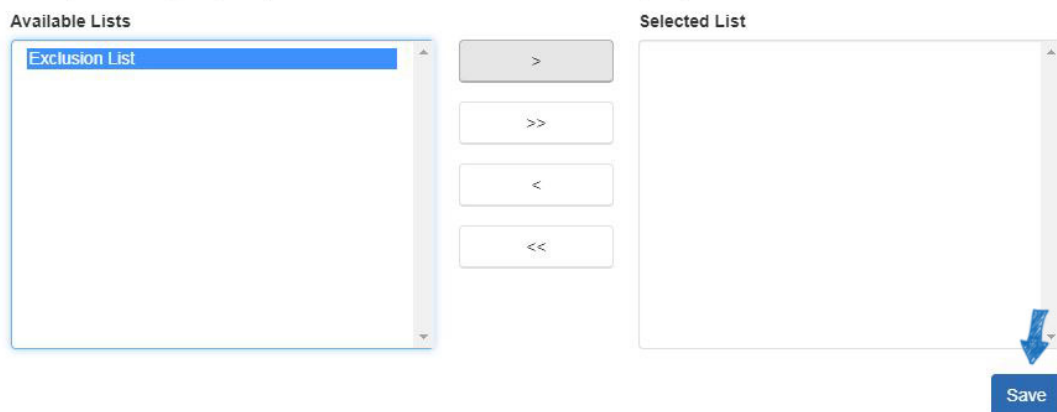
- Click an individual list or hold CTRL to select multiple lists, and then use the right pointing arrows to add these to the Selected List box.
- Use the double right pointing arrows to add all available lists to the Selected List box.
- Click an individual list or hold CTRL to select multiple lists in the Selected Lists, and then use the left pointing arrows to remove them from the Selected List box.
- Use the double left pointing arrows to remove all selected lists.

## Exclusions

### Product Suppression

To suppress products from this Website, move the set of products to be suppressed from the list on the left to the list on the right by highlighting and using the arrow buttons. Then click Save.

Because product IDs may change at any time these lists need to be reviewed and maintained regularly.



Click on the Save button when you are finished. Click on the Make Changes Live to publish these changes.

## Category Control

ESP Websites enables you to limit the categories on your site. Just like with product lists, click on a category from the options on the and then click on the single arrow to move it

onto the excluded list.

**Note:** A product that is listed multiple categories and one of the categories tied to the product is set as excluded from our site, that product will not appear in related categories.

### Category Control

This section allows you to control what categories appear on your Website. All categories are shown by default. To exclude a category, select it from the "Included" list on the left. Click the first arrow button in the middle and the category will move to the "Excluded" list on the right. Click the blue "Save" button.

The interface consists of two main panels: 'Included' on the left and 'Excluded' on the right. Each panel has a search bar at the top. The 'Included' panel contains a list of categories, with 'ADULT NOVELTIES' currently selected and highlighted in blue. Between the two panels are four arrow buttons: a single right arrow (>), a double right arrow (>>), a single left arrow (<), and a double left arrow (<<). The 'Excluded' panel is currently empty. At the bottom right, there is a blue 'Save' button. A blue arrow points from a note below the 'Included' list down to the 'Save' button.

**Included**

Search

- 3-D PRODUCTS
- ADDRESS BOOKS
- ADULT NOVELTIES**
- ALARMS & PROTECTIVE DEVICES
- ALBUMS
- ALMANACS
- ANTENNA ACCESSORIES
- ANTIBACTERIAL PRODUCTS
- ANTIMICROBIAL ENHANCED PRODUCTS
- APOTHECARY JARS
- APRONS
- ARM BANDS
- ART & DESIGN SERVICES
- ART SUPPLIES

**Excluded**

Search

>

>>

<

<<

**Note:** If a product is in more than one category, and one of the categories tied to the product is excluded, then that product will be excluded from the site for all related categories as well.

Save

Click on the Save button when you are finished. Click on the Make Changes Live to publish these changes.

### Supplier Control

ESP Websites enables you to limit the suppliers shown on your site. In the Exclude a Company box, begin typing a supplier name or ASI number. The matching results will appear below and we can click on the "Add to Excluded List" button.

To remove a supplier from the Excluded List, hover on the supplier listing and then click on the "Remove from Excluded List" button.

## Supplier Control

This section allows you to control what suppliers appear on your Website. By default, all suppliers are shown. If you would like to exclude a supplier, type the supplier's name in the gray box; click the blue "Add to Excluded List" button; and click the blue "Save" button. Save button will only apply to the Supplier Exclusion section.

### Exclude a Company



### Excluded

[Save](#)

Click on the Save button when you are finished. Click on the Make Changes Live to publish these changes.

**ABC Promotional**

<https://abcpromotions.espwebsite.com> (OBHM)

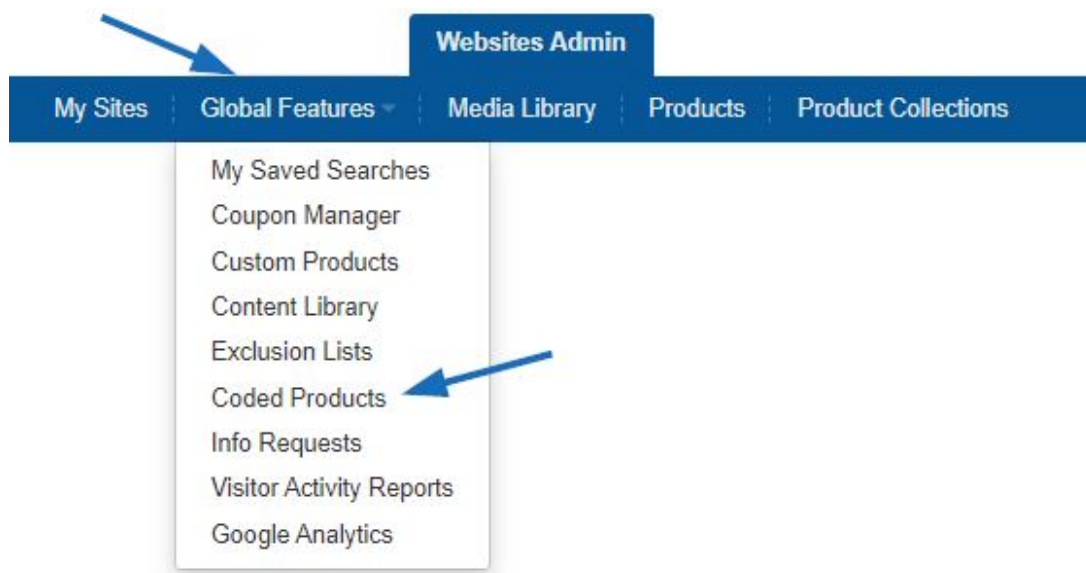
[Preview](#)[View Live Site](#)[Make Changes Live](#)

## Coded Products

Coded product numbers are distinct call numbers for products which are individualized for your company. These numbers are different from the supplier's product number. A benefit to using coded product numbers is that the numbers only correspond to products on your ESP Website. This means that every user under your ASI number will have the same coded product number for an item.

The Coded Products option in Global Features provides a search for coded product numbers. If you have not enabled coded product numbers for your ESP Website or Company Store(s), you will need to do so in the Website Settings - Display Options area.

To search for Coded Products or to retrieve the real product number with supplier information, click on Global Features and select Coded Products from the dropdown.



Type in or paste the coded product number and then click on **Go**.

## Search Coded Products i

Go

The product will be displayed in the Detail view with all information, including the real product number and supplier information.

### Information Requests

Information requests enable visitors to your site to send a request for more information prior to purchasing. In the Information Request area, you can view the visitors' company name, email, phone number, date they need the product, status of the request, name of your site, and the Action Items. In the Action Items, you can click "Edit" to view the Info Request Details (this will open below the Manage Info Requests section).

Search: <input type="text"/>						Show <span style="border: 1px solid #ccc; padding: 0 5px;">10</span> entries
Company Name	Email	Phone	Date Needed	Status	Site Name	Action Items
ASI	customer@company.com	800-546-1350	07/01/2019	In Progress	ABC Promotional Products, Inc.	<a href="#" style="border: 1px solid #007bff; border-radius: 3px; padding: 2px 5px;">Edit</a>
<div style="display: flex; align-items: center;"> <span style="margin: 0 5px;">&lt;&lt;</span> <span style="margin: 0 5px;">&lt;</span> <span style="margin: 0 5px;">1</span> <span style="margin: 0 5px;">&gt;</span> <span style="margin: 0 5px;">&gt;&gt;</span> </div>						Showing 1 to 2 of 2 entries

In the Info Request Details area, you will be able to view all of the information that was entered in the information request. You can click on the "Product Info ID" link to view the Product Detail page. You can also change the status of the info request by clicking on the Status dropdown. The status of an info request can be: New, In Progress, or Completed. After you have made your selection, click on Save to save your changes.



### Info Request Details

Status <span>In Progress ▼</span>		
Company Name ASI	Phone 800-546-1350	Date Needed 07/01/2019
First Name John	Fax	Comment I am considering this product for an upcoming event. Please send more information. Thank you.
Last Name Doe	Product ID 4987143	
Email customer@company.com	Quantity 500	

Cancel Save

## Visitor Activity Reports

The Visitor Activity Report section enables you to view information regarding various features on your site and how often they are being used. Select a month and a site using the dropdowns provided.

### Reports ⓘ

Select Month 2019 Februar ▼

Select a Site 0BHM - ABC Promotional ▼

Use the links on the left side to view information for that function. The available functions are Searches and Keywords, Product Views and Shares, Featured Product Sets (Product Collections), and Product of the Day and Banner.

#### Select a Report

[Searches and Keywords](#)  
[Product Views and Shares](#)  
[Featured Product Sets](#)  
[Product of The Day](#)  
[Banner](#)

**Note:** If a feature is not active on your site, it will not be available in the links on the left under Select a Report.

## Google Analytics

To go directly to in-depth information regarding your website statistics via Google Analytics, select Google Analytics from the Global Features dropdown. The Google Analytics website will open in a new tab and you will be able to log in to view all available statistics for your ESP Website and/or Company Store(s).