User Manual

Table of Contents

Chapter 1: Login/Dashboard

To get started with ESP Web, go to http://espweb.asicentral.com and log into ESP Web with your ASI Number, Username, and Password.

You will be brought to the Dashboard. The Dashboard provides quick links into different features of both ESP Web and ESP Orders. There are several features on the Dashboard which can help you navigate to different functions of ESP Web.

ESP Web Dashboard Page

First, you will see the "Set As Startup" in the upper right hand corner. If you click on this link, the text will change to say "Default Startup" and the next time you log into ESP Web, you will be brought directly to the ESP Web Homepage.

The icon with the word bubbles is where you can click to submit feedback to ASI.

Clicking on the application quick link will bring you into that feature of ESP Web.

The question mark icon explains what the application quick link does.

The film strip icon is where you can click to watch a video about the feature. For example, if you click on the video icon for "Create A New Presentation", then video will focus on how to do a presentation.

Chapter 2: Homepage

The ESP Web Homepage is the starting page for ESP Web.
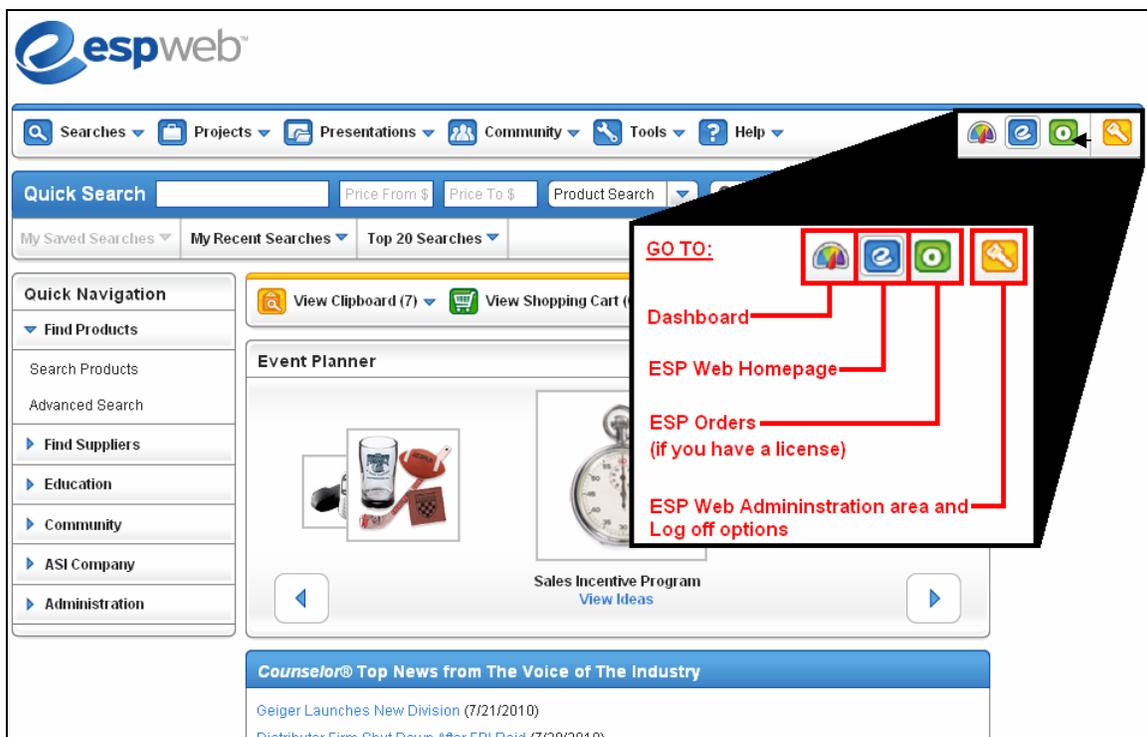
ESP Web Homepage

Clicking on the ESP Admin (Gold icon) will provide you with 3 options:
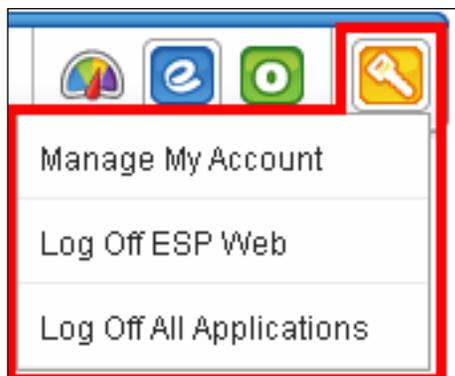
- "Manage My Account" takes you to the page where you can make changes to your user account
- "Log Off ESP Web" will log you out of ESP Web.
- "Log Off All Applications" will log you out of all ESP applications at once. For example, if you are working in ESP Web and ESP Orders, you can use the "Log Off All Applications" to log out of both applications simultaneously.

The Application Toolbar

The application toolbar is located at the top of the ESP Web homepage. This toolbar helps you navigate to different features in ESP Web.
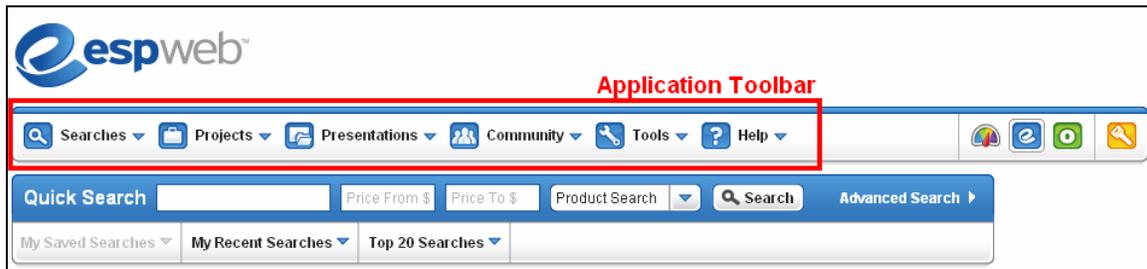
ESP Web Homepage

Searches

- **Product Search** - Brings up ALL products
- **Product Advanced Search**- Brings up a page of various criteria on which to search for your products.
- **Supplier Search** - Brings up all Suppliers.
- **Supplier Advanced Search** - Brings up a page of various criteria on which to search for suppliers.
- **My Saved Searches** - Opens a drop list containing up to 20 of your saved searches in Alphabetic order.
- **Top Searches** - Opens a drop list containing the top 20 distributor Product searches.
- **Mange My Saved Searches** - Opens a pop-up window that allows you to manage your saved searches.
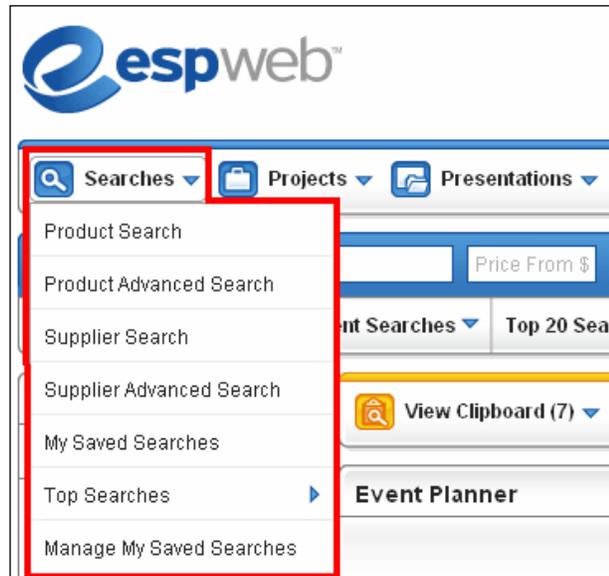
Projects

- **My Projects** opens the Projects page.
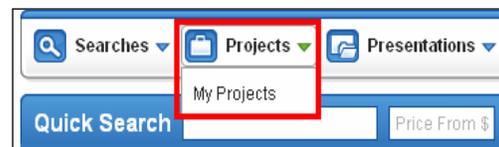
Presentations

- **Open My Last Presentation** opens your last presentation.
- **Create New Presentation** allows you create a new presentation.
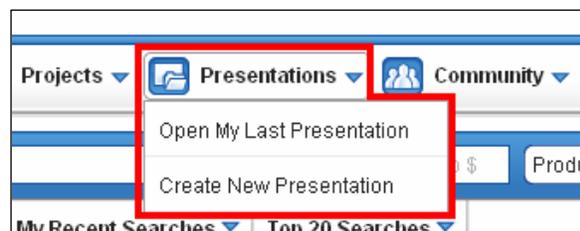
Community

- ASI Central takes you to
  www.asicentral.com
- Tim Andrews Blog, takes you to his
  blog.
- The ASI Social Network, ASI
  Facebook, ASI YouTube, and ASI
  Twitter will take you to the internet
  website.
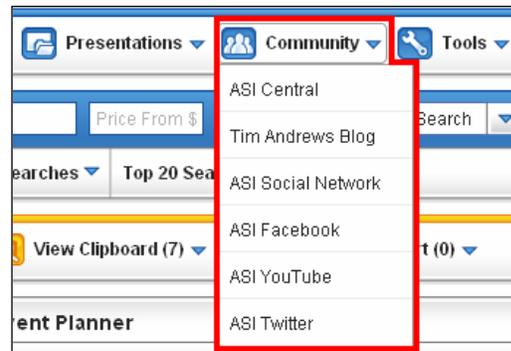
Tools
- **Preferences** is an area where you can
  set up default preferences for ESP Web.
- **Submit Feedback** allows you to submit
  feedback to ASI by allowing you to send
  an e-mail to support@asicentral.com.
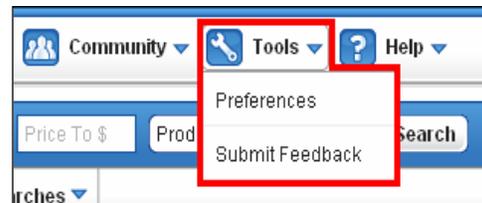
Preferences

The preferences options are:

Preferences

- **Show Net Cost:** The Show Net Cost checkbox controls the display of Net Cost
  and Profit in ESP Web. When the checkbox is marked, Net Cost and Profit will
  display; when the check mark is removed, Net Cost and Profit will be hidden.
- **Show Supplier Information:** The Show Supplier Information checkbox controls
  the display of Supplier Company and Contact information in ESP Web. When the
  checkbox is marked, Supplier information will display; when the check mark is
  removed, Supplier information will be hidden and Supplier Search will be
  inaccessible.

- **Product Default Sort By:** allows you to set up a default sort for your products by: price (low to high, high to low), cost (low to high, high to low), Profit, ASI Number, Supplier Name, Supplier Rating, Preferred Rank, Product name, Product Number, Confirmed Product, or New product.
- **Preferred Suppliers – Custom Rank Name:** Here you can assign a name to each of the Preferred Suppliers you want to rank (Rank 1 is the highest). For further information on how to set up Preferred Suppliers, please refer Chapter Seven: Preferred Suppliers.

Help

- **FAQ's:** Takes you to ESP Web's interactive help page.
- **Training Videos:** Takes you to links to Training Videos. Listed by subject.
- **Product Support:** Takes you to a page where you can contact Product Support, access training videos, review FAQs and register for instructor led classes.
- **Contact Us:** Opens an e-mail allowing you to submit questions/comments.
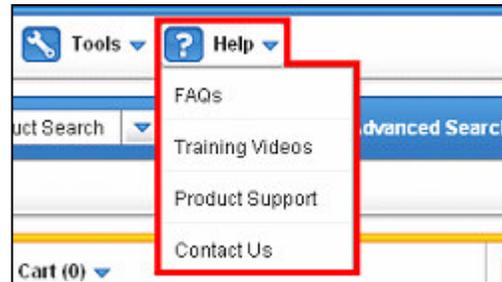
Quick Navigation Toolbar

The Quick Navigation will help you access different areas quickly and easily!
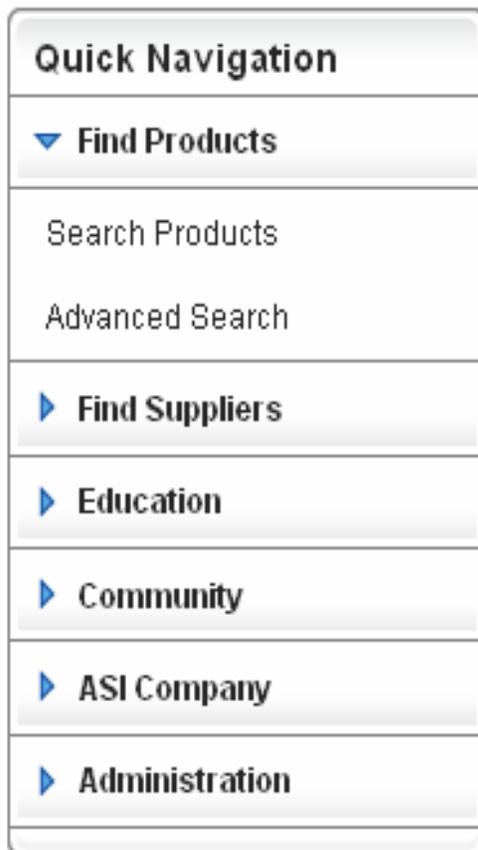
Find Products
- Product Quick Search
- Product Advanced Search

Find Suppliers
- Supplier Quick Search
- Supplier Advanced Search

Education
- ASI Education (Education about the promotional products industry)
- Access the training videos for ESP Web

Community
- Tim Andrews' Blog
- ASI Social Network
- ASI Facebook
- ASI YouTube
- ASI Twitter

ASI Company
- ASI Central
- ASI Store (For purchasing ASI services)

Administration
- ASI Online Account Manager (Manage your company account with ASI)

Event Planner

The Event Planner is a sales generating tool to help you create more business, develop new ideas and impress your clients. This feature makes it easy to respond instantly to client requests. For more information on Ideas/Event Planner please refer to Chapter 8: The Event Planner in this manual.

News

This section contains Counselor® Top News from The Voice of The Industry.
- To read a news item, click on the heading that you would like to read. The links show in blue and the date it was published displays next to it.
- This process will take you to www.asicentral.com where the news item is located.

Chapter 3: Searching

Searching in ESP Web uses "guided navigation". Guided navigation means you can type in one or more keywords, then use the menu to the left to narrow down your results. There are several ways to search in ESP Web. You can use the Product Quick Search, Product Advanced Search, Supplier Search, or Supplier Advanced Search.

Quick Search Bar – ESP Web Homepage

Product Quick Search

Enter the description of the product you are searching. For example, typing in "zip", "hood", and "fleece". Add "price from/price to" if you wish, but you do not have to. In the example below, the search will be for $10 to $20 list price.

Note: You can use both or simply one of the price boxes. If you wanted all products up to $20.00, just put the dollar amount in the second box.

After entering your criteria, click on the Search button to start looking through products.

Product Summary View

Product Advanced Search

Clicking on Advanced Search will allow you to search for a product by keyword (this is essentially the Quick Search), but you can also put in specific criteria. The advanced search page is in three sections.

The first section has dropdowns for product number, category, and tradename. Just start typing what you want in these boxes and the application will match the criteria letter for letter.

Also, in this section, there is a price range search. You can search by List Price, Net Cost, or Profit, as well as Quantity. In addition to the price search, you can use the drop down boxes to search for color, material, imprint method, shape, size, and theme.
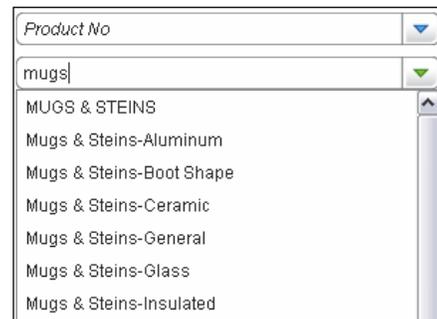
In the middle section, you can search by Supplier ASI Number, Supplier Name, or Linename. You can also put in a standard production time, or check the "Include Rush Time" box to include rush services. You can click on the number of stars to search by supplier rating (one star is the lowest, five is the highest). You can use the dropdowns to choose a state/province or a region/country. If you have preferred suppliers set up, you can check the level(s) you would like to use. For more information on preferred suppliers, please see Chapter 7: Preferred Suppliers.

In the third section there are checkboxes on the right hand side. Checking one of these boxes will help narrow your results to those which have the checked criteria.

For example, if you wanted to search for the same hooded zippered fleece in advanced search, you can put "Sweatshirts" under category, and then use Hood* and Zip* in the "Keywords" section. The * is known as the wildcard and will give you any ending on the base root word. In this example, using Hood* will give us results for all variations of hood like: hoods, hoodie, hoodies, etc. After typing in your criteria, click on "Search".

ESP Web - Product Advanced Search Page

Supplier Quick Search

Click on the "Searches" button and select Supplier Search. Enter either ASI #, Supplier Name, Line Name, Country, State, City or Zip or a combination of these items.

Remember, supplier search is for searching supplier's information, like their linenames and tradenames, not for searching products.

Quick Search Bar – ESP Web Homepage

Hit "Search"

Supplier Summary View

Supplier Advanced Search

Supplier Advanced Search lets you search for a supplier by their location, contact information, rating, and even preferred supplier rank. You can use each one of these search options individually, or you may combine them. For example, if you wanted to search for all the five star suppliers in Pennsylvania, you could select "Pennsylvania" in the State/Province dropdown box and then click on the number of stars (in this example, five), and then click on "Search".

Supplier Advanced Search

Viewing Your Results
The default results display is the Summary View. On the Summary view, you can navigate through the results by page, viewing 25 to 100 items per page and choose how to sort your results. Simply click on the option you want and the page will refresh to show your choice.

Product Summary View

Also in the Summary View, there is the option to "View Prices" which will open the product's full price grid directly below the product summary. After you click on "View

Prices" and the grid opens below the product, the button will change to say "Hide Prices". You can click on the "Hide Prices" button to not show the price grid.

ESP Web Summary View

Summary View shows a picture of the item, list price, net cost, supplier information, product name, and a summary of the item.

Summary View

There are several features which can help you when viewing an item.

 The summary view image is a thumbnail image, but you can just hold your mouse on the camera icon to view a large image.

Click on the product image in the Summary View to get to Product Quick View.

Product Quick View

In the Product Quick View you will see:

- Supplier Information
- Full Description
- Larger image
- Full Price Grid

To view more information, click on the "View Details" button at the bottom.

Product Tile View

Another way to see your results is by the Tile view. Here, the products are tiled on the screen with images, ASI numbers and first quantity list price.

Tile View

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You can still view the large image by holding your mouse over the camera icon.

You will see the supplier's ASI number and the first quantity pricing.

You are also able to add to clipboard by clicking on the clipboard icon.

You can also use the details button to go to the Detail View.

Product Detail View

The detail view will show you all the information about that item. In the detail view, there are several sections. The first section you will see is the Product Description which will display the product images, product number, product name, full description, tradename (if available) and catalog information (you can click on the catalog icon to view the page). To the right of the product description, you will see the supplier information including production time, FOB point, marketing policy, and any applicable product safety warnings.
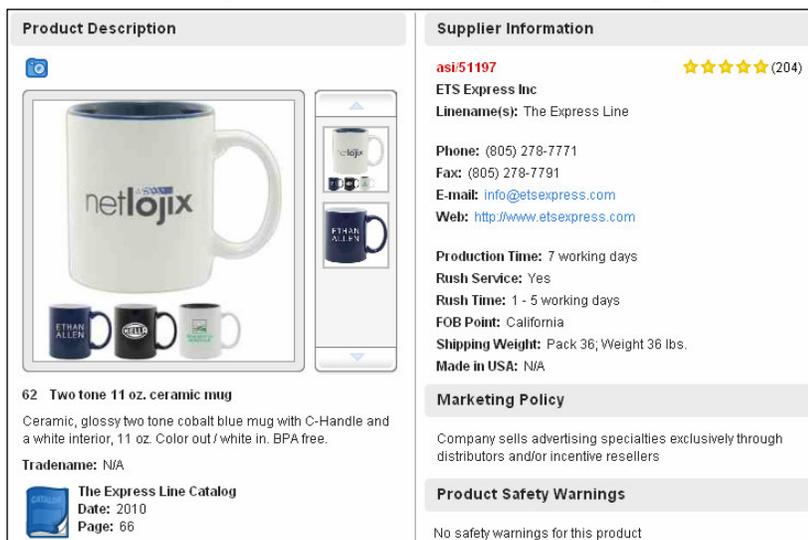
Below these two sections, you will see the price grid. This price grid will show base product prices. If there is only one price for the product, there will be only one grid located here. However, if the product has more than one base price, for example, if there is the option for a 10 working day product time and a 3 working day production time, there will be two price grids in the one product!

	62				
Quantity	72	144	288	576	1,008
List Price 🇺🇸	$3.59	$2.89	$2.79	$2.69	$2.59
Net Cost 🇺🇸	$2.154	$1.734	$1.674	$1.614	$1.554
Profit	$1.44	$1.16	$1.12	$1.08	$1.04

Price Includes: One color imprint. 🛒 Add to Shopping Cart

(5R) Price subject to change without notice, please verify with supplier.

Under the price grid(s) you will be able to view the product attributes. Product Attributes include size, shape, color, material, and product options. Within the Product Attributes section, you can also see production time, rush services, all imprinting information, shipping information, and any additional charges that are associated with the product.

Also, in the detail view, there is the "Configure Product" area, where you can specify criteria for a product.

Product Detail View

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Narrowing Your Results

After you have done a search, you can narrow your results down even further. With ESP Web, you can use the guided navigation to do this quickly and easily.

From the results page, there is a section titled "Narrow Results". The Narrow Results displays all of the data fields that can be specified to narrow your results.

Open the field by clicking on the triangle next to the field.

Clicking a narrow results topic will open the subset of the field below it:

As you can see with color, the subsets are not specific, are grouped by shade. To narrow the results further, click on the shades, in this example, blue shades.

Clicking on "blue shades" will open the different subsets of blue within the search:
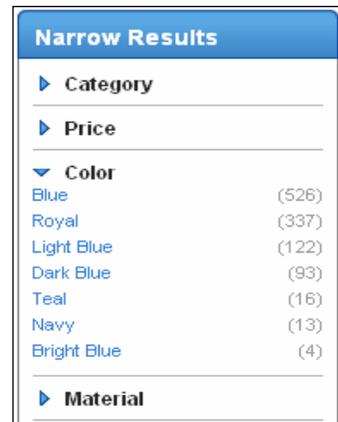
You can then click on a type of blue to narrow your products down to that specific shade and look through those products. This way, rather than trying to match what the supplier has called the color (navy, navy blue, dark navy blue); you have access to all the products in that color field through a few easy clicks!

Note - when selecting any "narrowing result" criteria, the actual numbers of items that will display are shown in parenthesis.

If you find that you have narrowed the criteria too deeply, you are able to remove some of your search by clicking on the X in "Your Selected Criteria" area.

You can also click on the X next to the "Clear All" to remove all of the search terms.

You also have the option to save the search by clicking on the "Save Search" link.
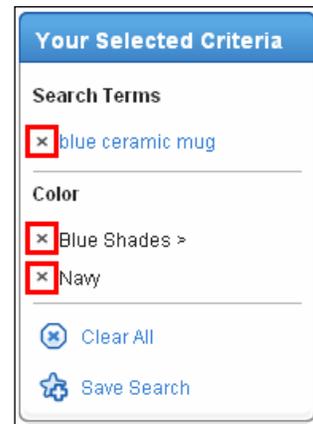
Saving Searches

For searches that you perform often, there is the "Save Search" button, which enables you to save your search. This means that all the selected criteria will be saved and you can access it at a later date. ESP Web gives you the option to save any product or supplier search (up to 20 different searches). To save a search, use one of the searching methods discussed above, then, from the results page, click on the "Save Search" link.
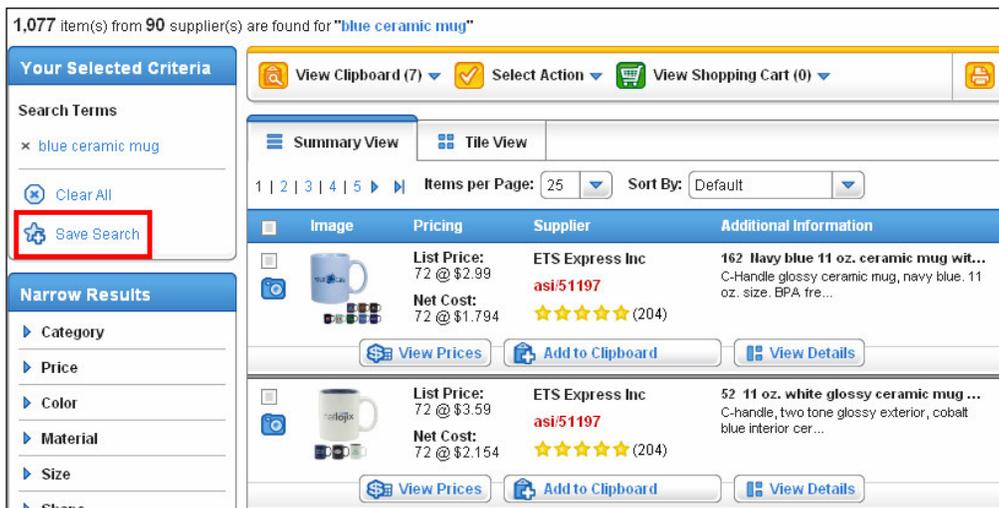
Product Summary View

Then, the "Manage Saved Searches" window will open. The name of the search will default to your search criteria, but you can rename the search if you like. For example, this search is called "blue ceramic mug", but it can easily be changed to "Blue Mugs – 7/22/2010". Then, click on "Save".
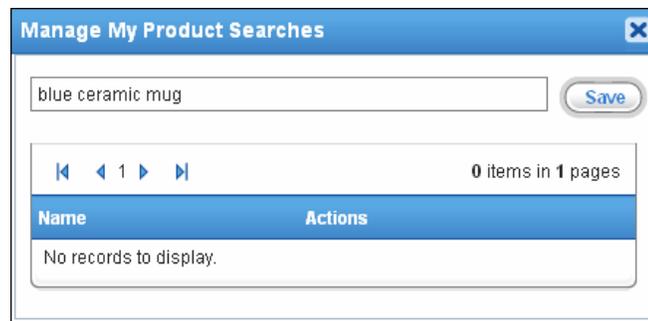
To access saved searches in the future, you can click on the "Searches" button on the application toolbar and click on "My Saved Searches" to see the searches you have saved. Other searching options in this menu include "My Recent Searches" which will show your last 20 searches. Also, there are the "Top 20 Searches", which are the top 20 keyword searches done by ALL users of ESP Web over the last 7 days.

Chapter 4: Using the Clipboard (how to save your products)

The clipboard is a place that stores your product selections for your customers while working in ESP Web. Items can be added to the clipboard one at a time, by clicking on the "Add to Clipboard" button from any of the views.

Summary View – Add to Clipboard
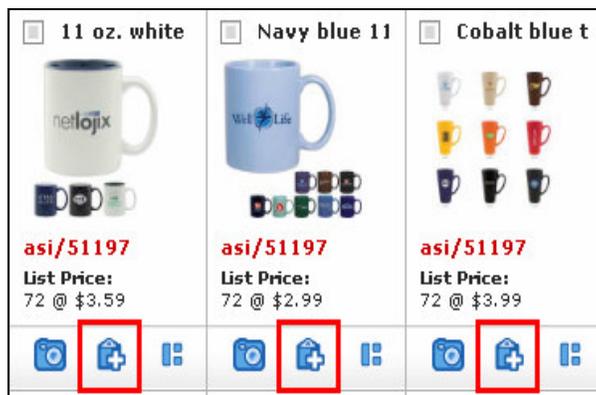
Tile View – Add to Clipboard
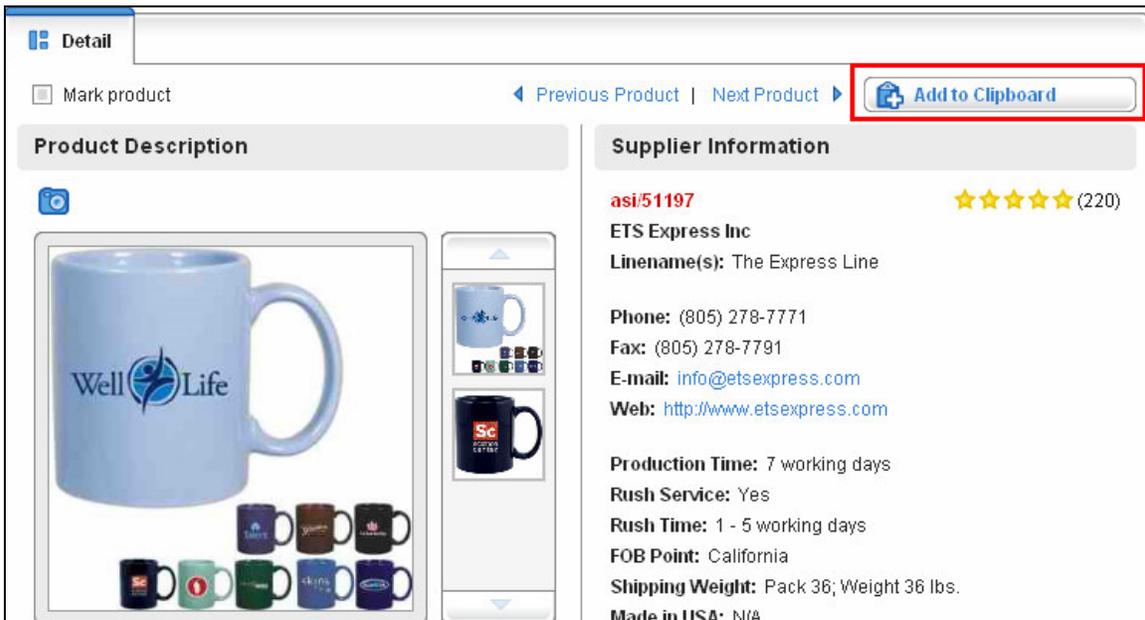
Product Detail View – Add to Clipboard

You can also add more than one product at a time by clicking into the checkbox to the left of the image then click on the "Select Action" button.
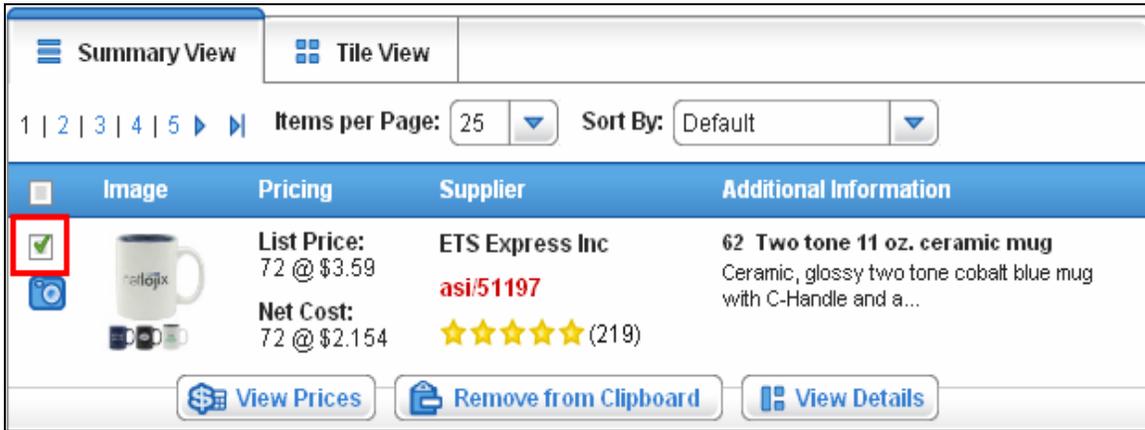
The "Select Action" button gives you the option to "Add marked products to clipboard" which will put your marked items onto the clipboard. You can place up to 250 items on the Clipboard for up to 90 days or until you take them off.
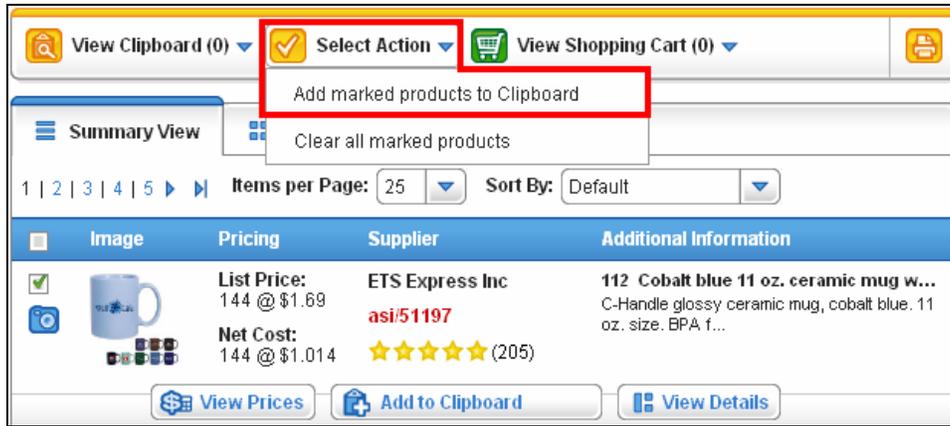
Note: The "Select Action" is available in Summary and Tile View, not in Detail View.

When viewing the clipboard, you will see all of the items which have been added. Newly added items will show after previously added items. You may need to use the scrollbar along the bottom of the products to view all the items on the clipboard.
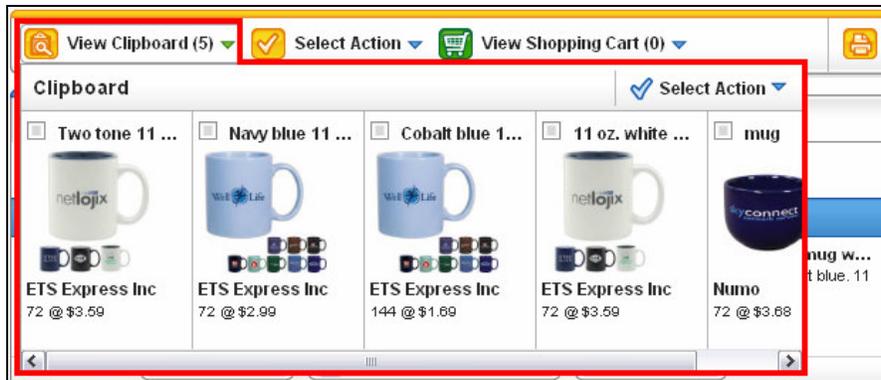
Clipboard

Once items are on the clipboard, you have several options on what to do with them. Please note that you need to mark the items you want to work with on the clipboard,

otherwise, the only option you will have available under the "Select Action" button is to "Select All". The "Select Action" button for the Clipboard is located in the upper right hand corner of the View Clipboard window.
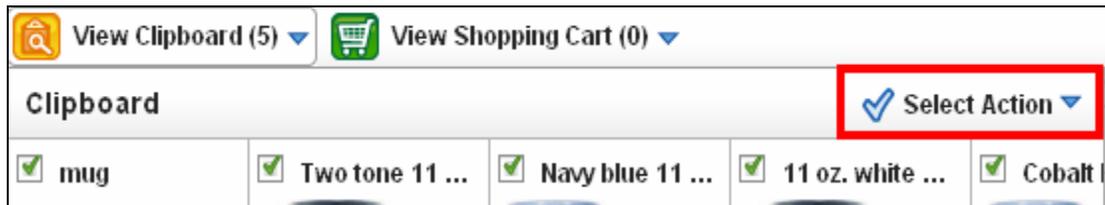
The Options in the "Select Action" menu are:

- **Delete** – delete marked products on the clipboard
- **Delete All** – delete all the products on the clipboard
- **Select All** – mark all the products on the clipboard
- **Deselect All** – unmark any selected items
- **Create New Presentation** – add any items you have marked and move them into the presentation area
- **Send** – emails the product will all the information
- **Add to Project** – adds the items to an existing project
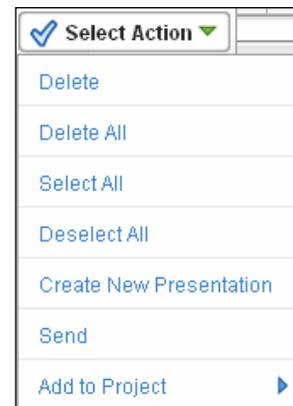
Chapter 5: Projects

One of the great added benefits of ESP is your ability to manage your client and their projects from any computer, PC or Mac, connected to the Web. This means you can respond faster than ever to customer requests and work just about anywhere you desire. ESP Projects is similar to an electronic filing cabinet where you store your customer's folders, products and presentations.

To access ESP Projects, click on the Projects Button and select My Projects.
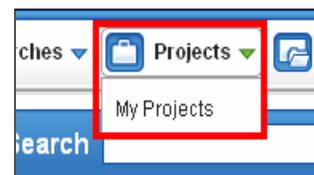
Creating and Naming Folders

When you first access this area, you will see a default folder titled Project 1.
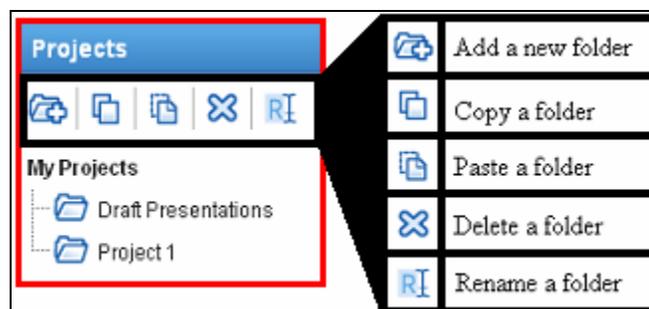
Explanation of Project Icons

To rename the folder, click on the folder, then click on the Rename button.

You will see the name of the folder is highlighted, just start typing in the new name.

When you are finished typing, just click anywhere else to save the new folder name.
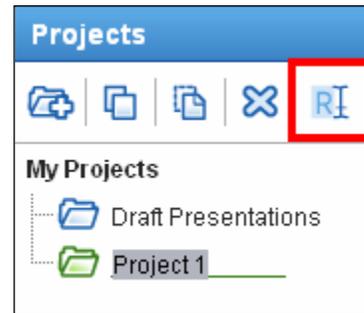
Creating a Sub Folder

To create a sub folder to an existing folder, click on the folder you would like to add the new sub folder to. Once you see the folder turn green and become underlined, click on the "create new folder" icon.

The new folder appears under immediately under the original folder. The default name of any new folder is "New" followed by a date and time stamp.

If the new folder name is highlighted, you can simply type a new name. If the new folder name is not highlighted, click on the folder, then click on the Rename button. Once you will see the name of the folder is highlighted, just start typing in the new name. Once you are finished typing, just click anywhere else to save the new folder name.
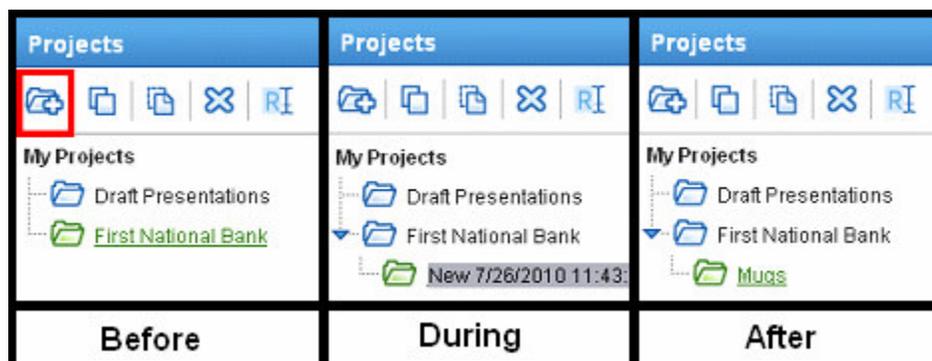
Deleting Folders

If you no longer need a project folder or subfolder, the process to remove them from your projects is rather straightforward.
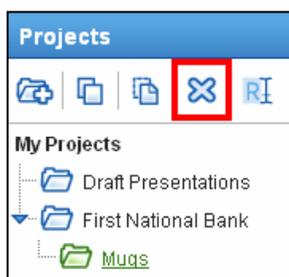
Click on the folder or subfolder you would like to delete, then click on the delete icon. You will receive a notification asking you "Are you sure you want to delete this item?" Click on "OK" to finish deleting or click "Cancel" to not delete the folder.

Note: If you delete a folder, any subfolders for that project folder will also be deleted.

Copy and Paste Folders

You can copy and paste folders and subfolders in the Projects. To copy a folder, click on the folder, and then click on the copy icon. Next, click on area you would like to paste the copied folder into. For example, if you wanted to copy "First National Bank", you would

click on the folder, and then click on the Copy icon. Next, you would click on "My Projects" and then click the Paste icon.
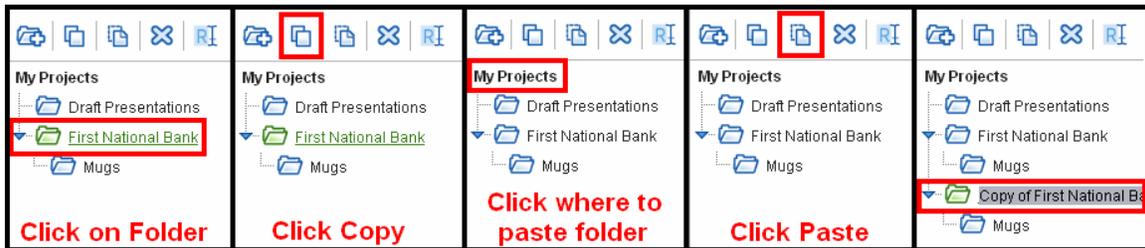
Note: If you copy a folder that has subfolders, the subfolders will be copied as well.

Properties

The properties frame lets you modify and/or add information for a folder. In the Properties, the Name is the name of the folder. You can add a due date and notes, as well as add customer to this folder. After you have finished making modifications or additions, click on the "Save" button to save your changes.
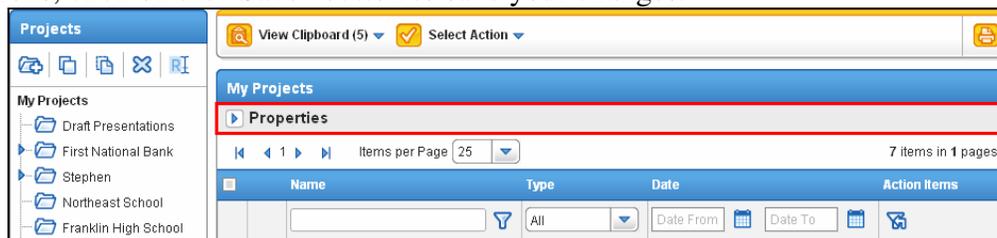
My Projects - Properties

Searching in Projects

Because you can create folders for all of your clients and their promotions, over time, you may have a lot of folders and finding your client quickly and easily can become more challenging. In your Projects area, you have the ability to search for your folders or the content within those folders. This means you can use this box to search for products you have saved as well as presentations. The search box is located below your list of projects.

You can search by any or all of the following items:
- Keyword
- Type (such as folder, product or presentation),
- "Look In" will allow you search a project folder.
- Date

There are several ways to search by date. Use the dropdown menu to select what type of date you are looking for, the date created, date modified, or due date. You can also click into the radio button to choose from the following options for your date: Within The Last Week, Past Month, Within the Past Year, or Specify Dates (you can type these dates in or use the calendar icon to click on the dates)

You can search using only one criterion, or you can combine criteria. If you need to start over, click on the "Reset" button.

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Search Results in Projects

Your results will display Folders, Products or Presentations. Any of the headers: Name, Type, Date, and Location can be clicked on and the results will be shown ascending alpha numeric order, then if you click again, they will be in descending alpha numeric order. The location links will bring you to that particular section in the projects so that you can use the action items.

Projects – Search Results Window

After clicking on a location, you will be brought into the Project area for that location. In the Project area, the headers will be able to sort in the same manner as search results. In the example below, the "Mugs" folder has been sorted in alphabetical descending order by the type of result.

Projects View

There are three types of results: Product, Presentation, and Folder. For each type, there are Quick View, Detailed View, and Delete options.

Projects View

For Presentations, there is an additional action item to edit and send.

Filters

Filters help you to narrow the results. You can filter by Name, Type, or Date. Using the filters is a very convenient way to find projects when you have a long list of results. If you start typing in the client's name, the results below will match letter by letter. This is why when "F" was typed above; both First National Bank and Franklin High School appeared as choices.

The reset icon clears any criteria you entered.

Toolbar

The toolbar in the Projects area includes View Clipboard and Select Action.

The View Clipboard and Select Action buttons in the projects area functions the same as in the product results section. For information on how to use the clipboard, please refer to Chapter 4: Using the Clipboard.

Chapter 6: Presentations

ESP Presentations combine the flexibility of Word and PowerPoint with email to create an incredibly effective marketing tool. Completely customizable, ESP Presentations are one of the best ways to brand your company while generating leads and sales.

To get to this location from the ESP Web Homepage, click on the "Presentations" button on the application toolbar and select "Create a New Presentation".
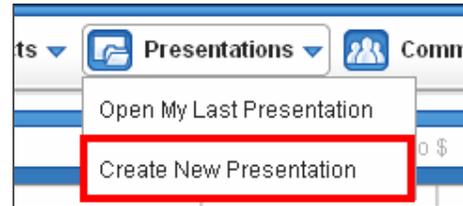
Once you are in the Presentation area; click on the "Templates & Layouts" tab. You are now ready to start setting up custom features. Set up your Cover Pages, Headers, Footers and Closing Pages for your Presentation first, so you can easily add your custom information while building your Presentation.
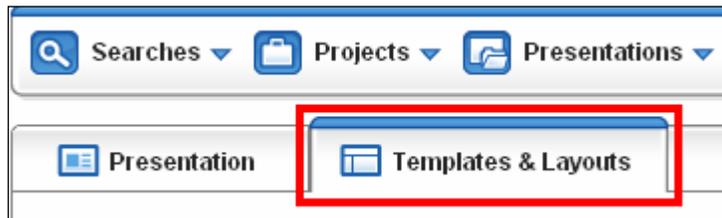
Cover Page

ESP Web comes with four sample cover pages. Sample cover pages can used at any time in a presentation and modified in the presentation. The General Text Cover, Opportunity Cover, Our Conversation Cover, and Sales Cover are available for you to customize for your own use. If you do not want to use one of the templates, you do not have to. You can click on the "Add New" button and type any text you like.

To make changes to one of these pages, click on the name of it. You will see the template open in the "Templates" area.
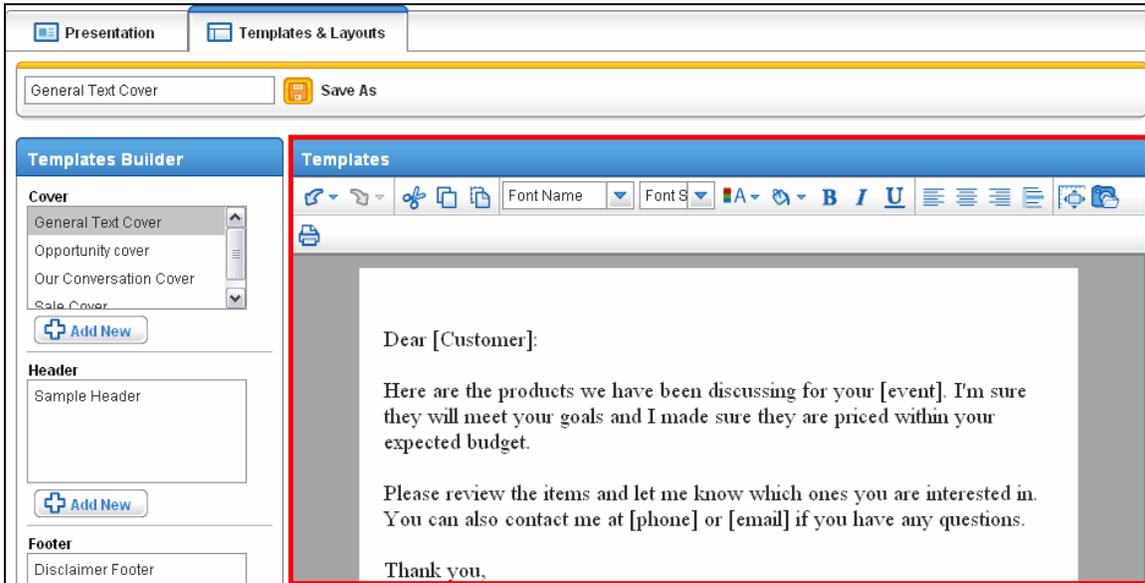
The sample cover pages can be modified using the Templates toolbar but cannot be deleted. If you want to modify our default cover page, you can make changes, then just rename the template, then click on the "Save As" button.

Templates Toolbar

The templates toolbar allows you to modify the look and feel of the page. It is available for ALL pages in the Presentation area. Therefore, you can use this toolbar to create custom cover pages, headers, footers, and closing pages; as well as use any presentation!

Presentations - Templates Toolbar

The templates toolbar has a lot of options for you to use. The most of the icons work very similarly to Microsoft Word. Below is a chart of each icon on the toolbar and its function. Spell check is built into the program.
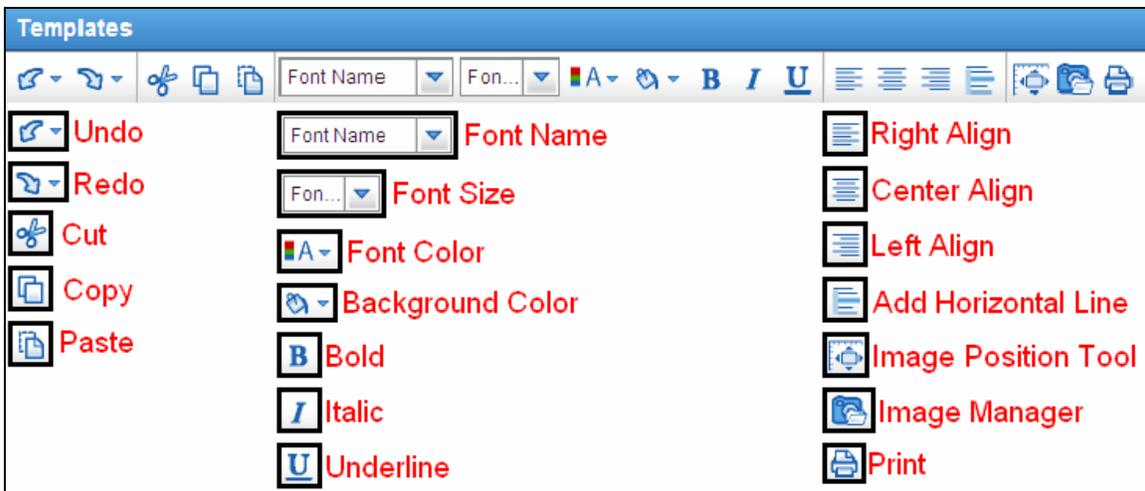
Presentation – Templates Toolbar – Explanation of Icons

Whether you have clicked on the "Add New" button and are creating a cover letter from a blank template, or modifying one of the templates, you will need to save your work. Once you have completed the cover page, give it a name and click on the "Save As" button at the below the Templates & Layouts tab.
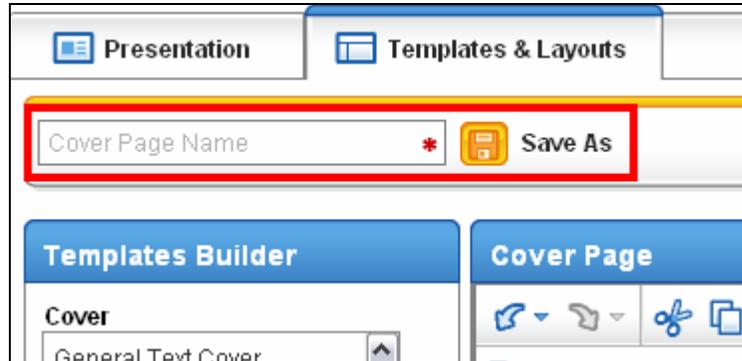
Presentations – Templates & Layouts

Header

The Header is used to brand your presentation with your company logo. We do provide you with a sample Header. The sample header can be modified using the Templates toolbar. We recommend you create your custom header from our template. Just make the changes you want, then just rename the template, then click on the "Save As" button.
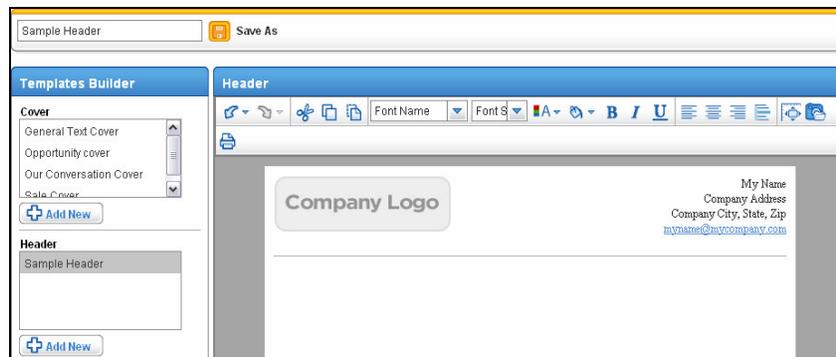
Templates & Layouts – Header

Just like with the cover letter, you can use the toolbar to modify your header, including uploading your own logo/image and positioning it. To upload your own image, click on the image manager icon.

The Presentation Image Manager box will open. This is where previously uploaded images will be stored and where you can upload new images. The image needs to be no larger than 200KB and in a .jpg, gif, or .png format.

Click on "Attach File" to browse your computer for the image file. Once you have located the

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file, click on it, then click on "Open". You will see the image in the Available Images section. You can use the "View" link to preview the image and then click on the "Insert Image" to add it to your header.
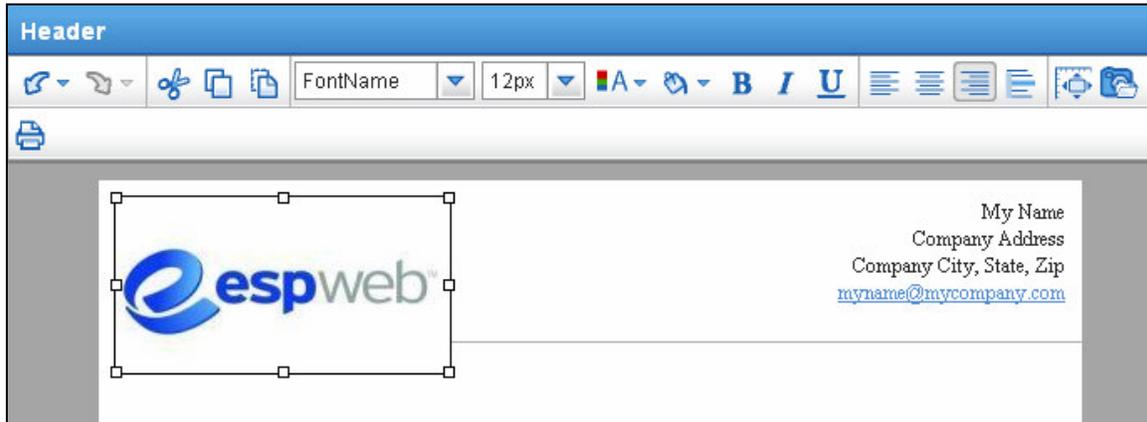
Presentation Templates and Layouts - Header Section

Once the image is in your header, you can click on the corners to resize it and use the position tool to move your logo to another area in the header.

Note: The position tool behaves differently depending on the browser.

You can also replace the sample text with your own information. The information does not have to be in the format that is provided; it can be anything you want! For example, header below was set up from the sample template. Then, give it a name and click on the "Save As" button to save it as an available header.

Footer

We do provide you with a sample Footer. The sample footer can be modified using the Templates toolbar. The process of adding a new footer or modifying the sample is the same used with the header.

Note: Footers have two special icons:

 Add the date   Add page numbers

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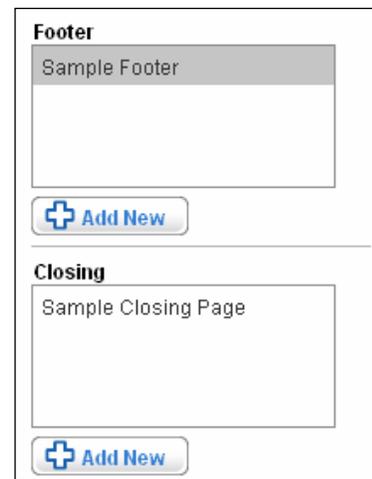
Closing Page

We do provide you with a sample Closing Page. The sample closing page can be modified using the Templates toolbar. The process of adding a new closing page or modifying the sample is the same used with the cover pages.

Creating a New Presentation

Now that you have created cover letters, headers, footers, and closing pages, you are ready to begin creating presentations. If you do not already have items saved on your clipboard, you will need to search for items you like and add them to the clipboard. For more information on how to do this, please refer to Chapter 3: Searching and Chapter 4: Using the Clipboard.

If you already have items on your clipboard to use, you can go to Presentations from the application toolbar and click on "Create New Presentation".

The Presentations area will open to the Presentation tab and you are ready to add products.
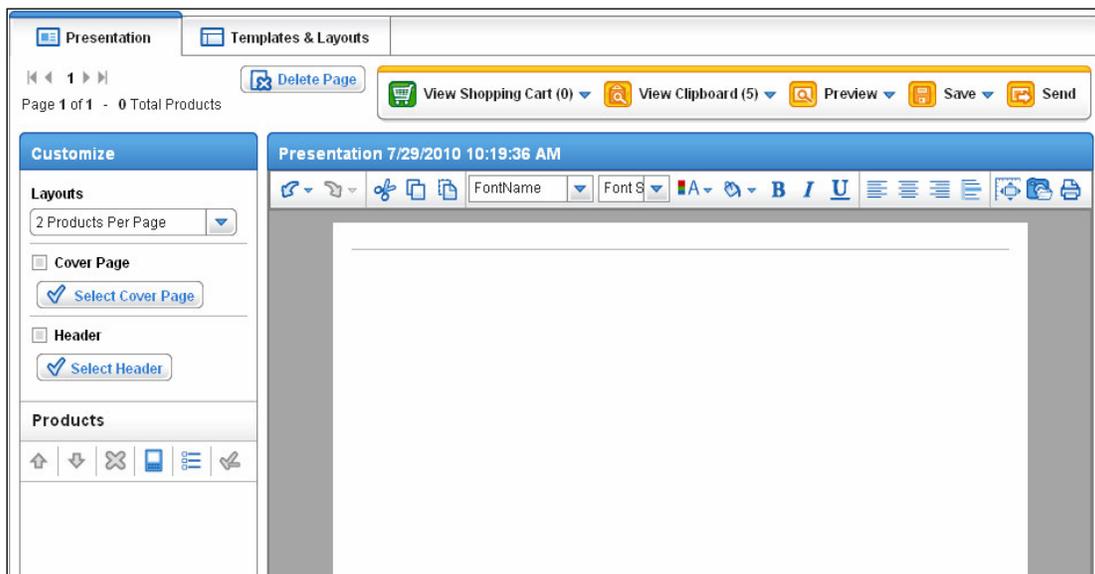
To add products, click on the "View Clipboard" button, mark the products you would like to use and then use the "Select Action" button to "Add to Current Presentation".
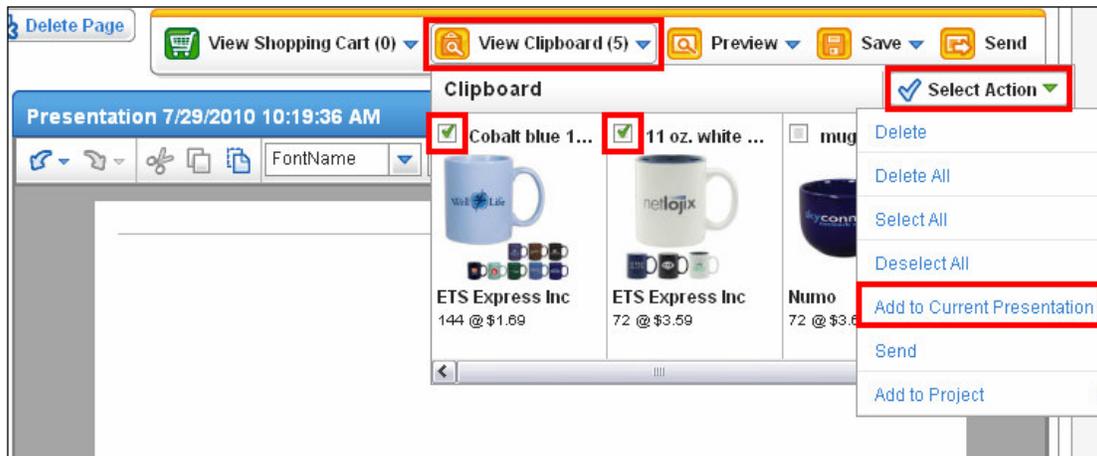
Now that you have added the products into the presentation, you can begin to personalize the presentation by using the options in the customize box.

Layouts

You can select how many products you want on a single page. You can have one, two, or three products per page.
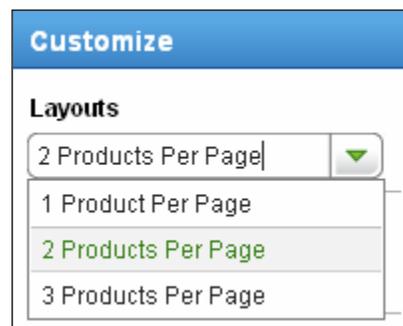
Cover page

You have the option to show a cover page as the first page of your presentation. To add a cover page, check the box to the left of the words cover page. You can either use the Sample cover page or one that you created.

Header

You have the option to show a header at the top of the pages of your presentations. To add a header, check the box to the left of the word Header.
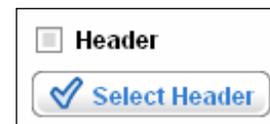
You can either use the Sample header or select one that you created from the drop down menu. You will have three options about how to display your header:
- Show the Header on all pages,
- All pages EXCEPT the first page (if you have a cover page, that will be the first page)
- All pages EXCEPT the last page (if you have a closing page, that will be the last page).
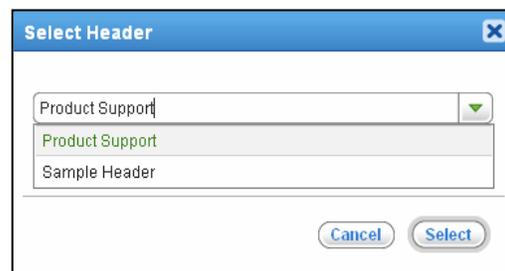
Once you have decided where you want your header to show, click on the "Select" button at the bottom and your header will appear on the presentation.

Products

The products in the presentation will appear in a list on the customize area. You can make changes to multiple products at a time, products can be selected or deselected by holding down the Control Key and clicking on the product. Selected products will have a green background. Within this area, you can move products up or down in the presentation, delete products, modifying pricing, select data fields to display, and deselect items.

Moving Products
You can move the products by using the arrow buttons.
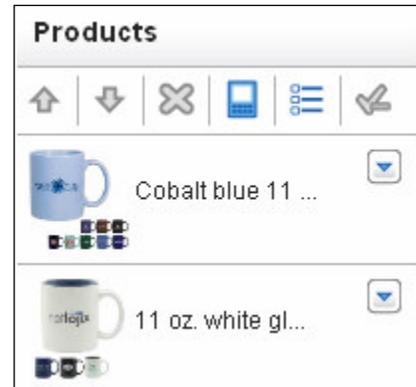
In this example, there are three mugs in the presentation. The middle mug is selected.

The up arrow would move the middle mug to the top position, making it the first mug in the presentation. The mug that was first will now be second.

The down arrow would move the mug down in the presentation, making it the third and final item. The mug which was previously last will now be the second to last item.

Note: You must move one item one space at a time, you cannot drag and drop.

Also, attached to each product is a smaller customization menu. Using the triangle button for the product, you have up to five options:
- Jump to Product
- Product Details
- Select Product Image
- Select Price Grid
- Add to Shopping Cart

Note: Not all options will be applicable for all products. Please refer to the option for information about its availability.
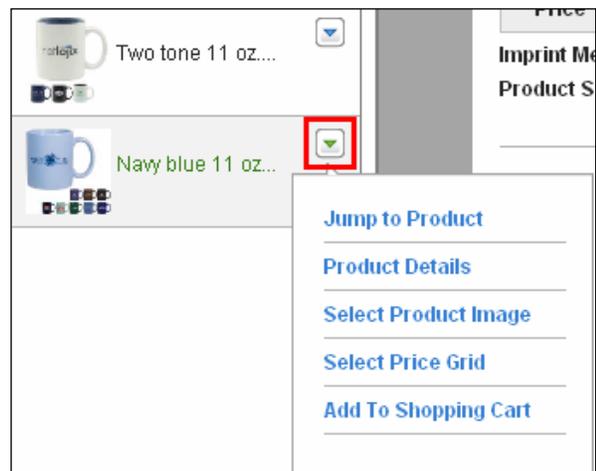
Jump to Product enables you to go directly to that product to edit it. This is very beneficial when the product is several pages into the presentation. This option will only be available if the product is on a different page than the one you are working on.

Product Details will open the ESP Web Detail View for that product in a separate window or tab. You can review or even copy and paste any information from the Detail page into the presentation. This option is available on all products.

Select Product Image enables you to choose from the images provided by the supplier. This option will be available for products where the supplier has provided additional images.

Select Price Grid enables you to select which price grid you would like to use if the product has more than one base price. For example, there might be two price grids because the item might cost more for a specific color or size. You can use this option to select which pricing you would like to use. This option will be available if the product has more that one base price.

Add to Shopping Cart (only for ESP Orders users) enables you to add the product directly from your presentation into the Shopping Cart for ESP Orders.

Deleting Products

To delete an item from the presentation, select the product, and then click on "X" icon. Deleting a product from a presentation does not remove it from the clipboard.

Price Calculator

The price calculator allows you to modify pricing for one product or all products in the presentation. To do this, select the product (or hold the CTRL key on your keyboard and select multiple products) that you would like to modify.

Click the Calculator Icon to open the Price Calculator.

On this new window, you will notice that Selected Products is in bold type, but you can click on the radio button for All Product if you want these changes to apply every product in the presentation.

You can adjust list pricing by a percentage by clicking in the radio button and typing in a percentage.

Or, you can add or subtract a fixed amount or percentage to (or from) the list price or net cost. Just click in the radio buttons and type in the values you want to use.

You can also use the check boxes to round to two decimal places or show higher quantity price grids first. If you need to reset the prices, click on the "Resent to Original Price" button. You

can also click on Cancel if you do not want to make changes, or you clicked into this box by accident. If you are satisfied with your changes, just click the "Apply" for your changes to take effect. The product pricing will be adjusted and your screen will refresh back to the Presentation.

Note: Remember, these changes apply to the list price on the presentation.

Product Data Fields
The data field icon enables you to choose the fields that appear on your presentation. To do this, select the product (or hold the CTRL key on your keyboard and select multiple products) that you would like to modify.

Click on the data field icon to access the checkbox list.

On this new window, you will notice that Selected Products is in bold type, but you can click on the radio button for All Product if you want these changes to apply every product in the presentation. The data field contains the list of all the data fields available for products. To show a data field, click in the box next to it. To hide a field, make sure there is no check in the box next to it. You can also click on Cancel if you do not want to make changes, or you clicked into this box by accident. If you are satisfied with your selections, click the "Apply" button at the bottom for your changes to take effect.

While you cannot set defaults, the computer remembers what fields you had checked in the previous presentation. Therefore, even though the program will open to defaults, to get your custom selected fields to show; click on the data field icon, and then click the "Apply" button at the bottom.

Note: If a data field is not available on a selected product, that field will be grayed out on the data field list pop-up page.

Clear Selection
The clear selection applies when you have more than one product in your presentation. If you selected an item by accident or have an item selected you do not want selected, just click on the clear selection icon.

Footer

You have the option to show a footer at the bottom of your presentation. To add a footer, check the box to the left of the word Footer.

You can either use the Sample header or select one that you created from the drop down menu. You will have three options about where to display your footer:

- All pages,
- All pages EXCEPT the first page (if you have a cover page, that will be the first page)
- All pages EXCEPT the last page (if you have a closing page, that will be the last page)
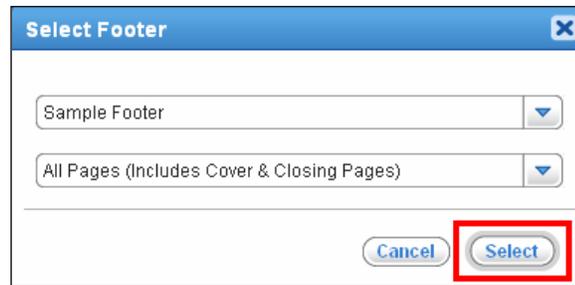
Closing Page

You have the option to show a closing page as the last page of your presentation. To add a closing page, check the box to the left of the word Cover Page.

When you click on the closing page checkbox, a dialog box that allows you to select a closing will be displayed. You can select the closing page you want to use from the drop down menu. You have the option to insert (via paste) any text or images on the closing page. The closing page will not exceed one page.
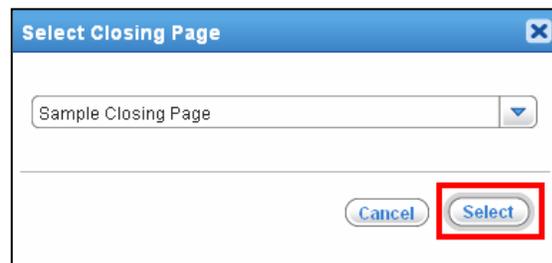
Presentation Changes

Making changes in the presentation is as easy as clicking and typing. You can use all the functions of the templates toolbar to make changes to the information for every product. For example, if you wanted the product safety warnings to stand out for a specific product, you can highlight the text you would like to change, then click on the font color icon from toolbar, then click on the color you want to use. To change the size, use the size dropdown and click on the size you want to use. To bold, click on the "Bold" icon.
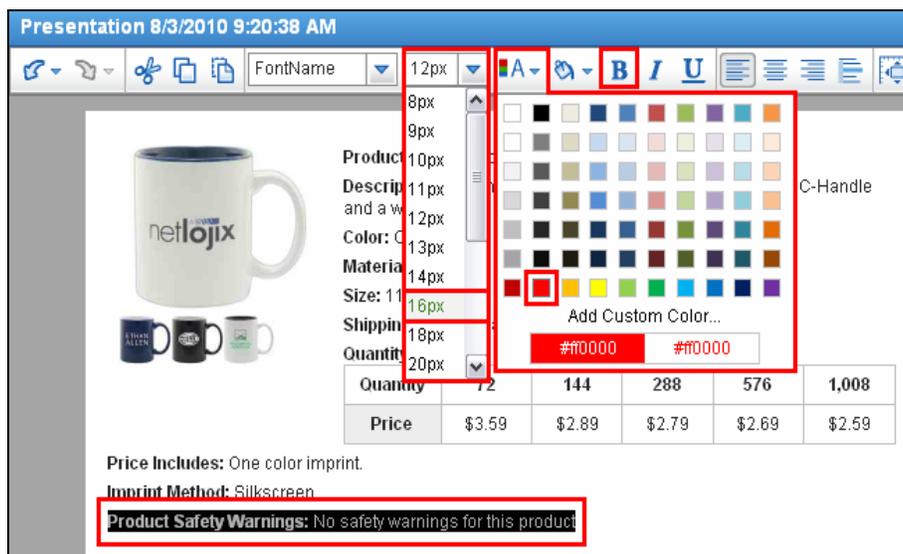
The Product Safety Warnings are now in a 16px font, bolded, and in bright red.

Product Name: Two tone 11 oz. ceramic mug
Description: Ceramic, glossy two tone cobalt blue mug with C-Handle and a white interior, 11 oz. Color out / white in. BPA free.
Color: Cobalt Blue
Material: Ceramic
Size: 11 oz
Shipping Weight: Pack 36; Weight 36 lbs.
Quantity/Pri

Quantity	72	144	288	576	1,008
Price	$3.59	$2.89	$2.79	$2.69	$2.59

Price Includes: One color imprint.
Imprint Method: Silkscreen
Product Safety Warnings: No safety warnings for this product

Note: If you need to undo, ***do not use*** the "Back" button on the browser. If you need to undo an action, use the "Undo" button in toolbar.

You can also delete any text you do not want to have. For example, if you do not want the words "Quantity/Price Grid", you can remove them just like removing text in Microsoft Word. In the example below, the Backspace button on the keyboard is being used to delete the text. Using the Delete button will also work to remove text. Many of the functions of the toolbar are similar to Microsoft Word.

Presentation Toolbar

This toolbar enables you to add items to the shopping cart (for ESP Orders users only), view the clipboard, preview the presentation (as both a PDF and in HTML format), save the presentation, and send the presentation.

View Shopping Cart
The View Shopping Cart button will only be present if you are also a user of ESP Orders. Items on the Shopping Cart can be moved into a Sales Order or Purchase Order in a just a few quick clicks.

View Clipboard
The View Clipboard button gives you access to all the products on the clipboard, as well as all the functions of the clipboard. For example, if there is an item you would like to add, you can click on the "View Clipboard" button, mark the product, and add it to the current presentation. For more information on these functions, please refer to Chapter 4: Using the Clipboard.

Preview
The preview button enables you to preview your presentation in either an HTML (web) format, or in as a PDF (Adobe) document. Previewing as a PDF will allows you to save your presentation anywhere on your computer and also gives you the option to print the presentation.

Saving

Prior to sending a presentation from ESP Web, you must save the presentation. Under the Save button, there are two options: "Save" and "Save As".
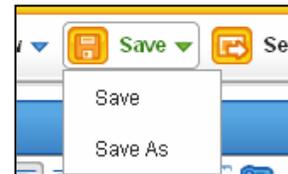
Clicking on "Save" will save your presentation in the draft presentation folder, with the name of the presentation as the date and time the presentation was started. If you are editing a presentation, you can use the "Save" button to save any changes you have made, as well as overwriting the existing presentation.

The "Save As" option will open your Projects folders. If you already have a client folder set up, you can click on the client folder.

TIP: If the client you are working with does not have a folder and you want to save this presentation into a folder for them, right click on "My Projects" and you will be able to click on "Add". A new folder will be added and you can type in the client's name.
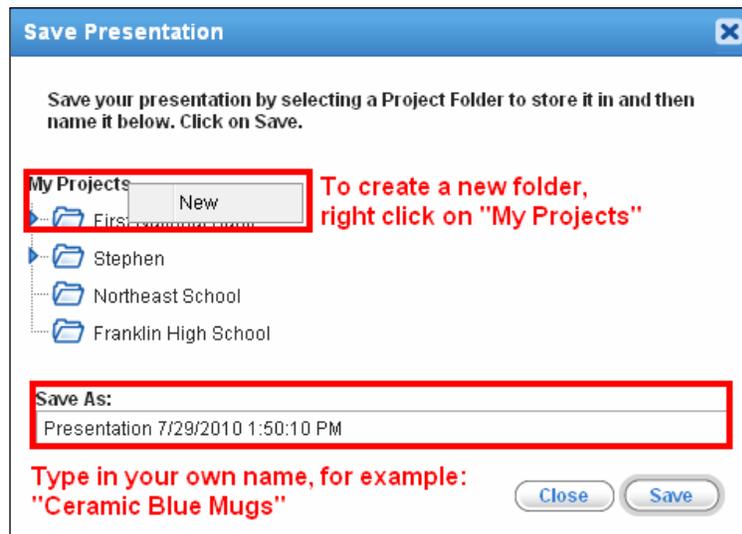
You will be able to rename the presentation, for example, rather than having it called "Presentation 7/29/2010 1:50:10 PM", you can type in "Blue Ceramic Mugs".

Then click on "Save" at the bottom.

Note: A presentation will be automatically saved every 10 minutes and be stored in your Draft Presentations folder.

By using the Projects to save your presentation, you are saving to the ESP Web server. Therefore, if you need to access any saved information from a different location, just log into ESP Web and all saved information will be available to you.
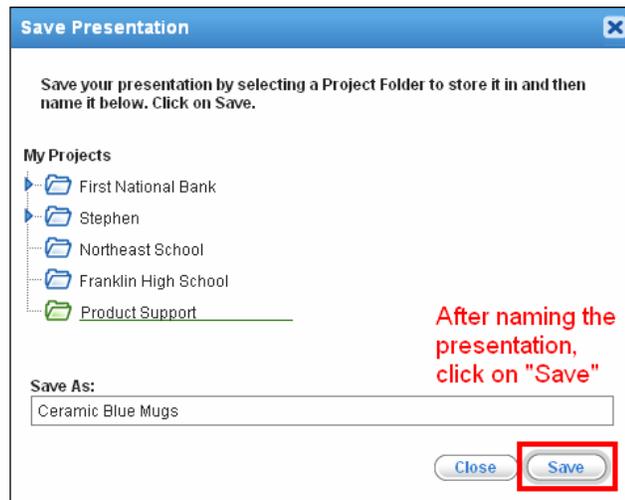
Sending

After you have saved the presentation, click on the "Send" button. You can send the presentation to your clients as either an HTML link or a PDF link. Both of these options will be available, regardless of what type of email you use.

There are two types of emails, program based and internet based. An easy way to tell which one you are using is to look at how you log in. If you double click on an icon on your desktop and your mail messages are there, you are using a program based email. Example of email programs are: Microsoft Office Outlook, Outlook Express, or Windows Mail.

If you go to the internet, then log into your email, you are using an internet based email. Examples of internet based emails are Yahoo, GMail, Comcast, or MSN.

With a program based email, when you click on send, ESP Web will make a call to your default mail program and then display the e-mail. The body of the email will contain a link to the presentation.

If you are using an internet based email, just copy the links to the presentation and paste them into an open email message.

To copy, highlight the link, right click, select "Copy", then open your email
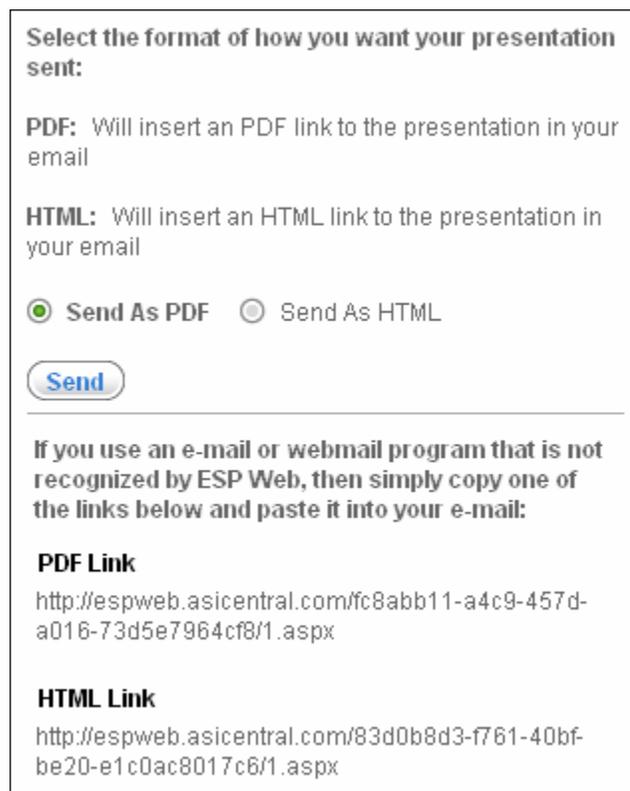
and in the blank body section, click "Paste".

When your customer receives the email, they will click on the link to view your presentation in the file type you selected.

Chapter 7: Preferred Suppliers

In ESP Web, you can set up preferred suppliers. Suppliers who are marked as preferred will appear first in search results.

Ranking Preferred Suppliers can be done in the preferences area. To access the preferences, click on "Tools" and then click on "Preferences". In the Preferences area, there are five rankings of preferred suppliers which can be set up. In the example, the highest ranking is "Awesome". You can name the ranks anything you want.

Note: For former ESP Online users, if you had preferred suppliers set up in ESP Online, they can be imported, but only one time. To use the one time importing tool, under "Tools" click on the "Import Preferred Suppliers".

After creating custom rank names, you need to add suppliers to these ranks. To do this, you will need to get to the supplier detail page. Though there are several ways to access the supplier detail page, the most straightforward way to is to do a supplier search. For help searching with using the Supplier search, please refer to Chapter 3: Searching.

After searching for the supplier, click on the "View Details" button from the summary view (the same process applies if you are in tile view).

Once you have reached the supplier detail page, click on the Tab for Preferred/Notes.

Note: This tab may be disabled if you have an administrator for Preferred Suppliers.

In the Preferred/Notes tab, you will be able to assign this supplier to any level of your preferred rankings. You will also be able to set up any special pricing you might receive from that supplier. You will also be able to enter notes for this supplier.

Preferred Pricing and Notes

If you receive special pricing from a supplier, you can set this up in ESP Web. On the Preferred Suppliers page, there is a section for Preferred Pricing.

The first step is to click into the checkbox next to "Apply the following discount to" and

then use the dropdown to select "Net Cost" or "List Price".

Then, click on the radio button next to the field that reflects the special pricing you are receiving. Each dropdown box has two options: "Minus Fixed Percent" or "Plus Fixed Percent".

If the special pricing you are receiving does not fit into the given choices, click in the radio button next to "Other Special Pricing" and type in what your individual pricing entails.

The "Exceptions or Notes about Preferred Pricing" is an open text box where you can type any information you need about your pricing. For example, exceptions or note could include: "EQP good until 9/2011".

Note: Profit is calculated on Preferred Price instead of Net Cost and preferred prices are displayed on price grids.

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In addition to setting up preferred pricing, you can also include notes about the suppliers. There are three different levels of notes: My Notes, Shared Notes, and Corporate Notes.

"My Notes" are notes that you can type in for your own reference and will only show in your ESP Web. You can click in the checkbox to "Share My Notes" to make your notes shared.

"Shared Notes" are notes that have been entered by users and can be viewed by everyone under the company's ASI number.

"Corporate Notes" can only be entered by the corporate/company administrator.

Once you are finished marking a supplier as preferred, assigning preferred pricing, or typing in notes, click on the "Save" button at the bottom. Preferred suppliers (and any data you have added for them) will show in ESP Web within about 15-20 minutes.

After designating a supplier as preferred, you will see your settings throughout the different views in ESP. Preferred Prices are displayed on Product Detail price grids. The preferred ranking and notes will follow the supplier information through all the different views in ESP Web: Product Summary View, Product Tile View, Product Detail View, Supplier Summary View, and Supplier Detail View. The preferred pricing will be included in every price grid available for all products from that supplier.


ESP Web Product Summary View

Chapter 8: The Event Planner

The Event Planner can help generate higher sales, develop new ideas, and impress your clients. It contains sets of products that you can browse when looking for ideas. These sets are "event" or "idea" oriented covering major distributor programs like golf outings, safety initiatives, and school programs. Program ideas and advice from ASI's magazine editors are provided with each event.

Click on the arrows to scroll through the list of events available. Then, click on the event topic of your choice. A new window launches with products, a video and the steps it takes to begin that event.
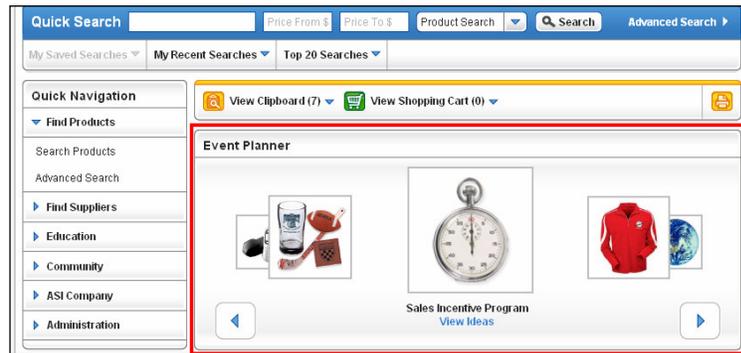
There is an audio/video in upper right corner, with the steps listed below. Three price tiers are available to meet the budget of every client. There are 3 tabs with Least Costly, Mid-range, and High-End items. If you mouse over the picture of the products, they open in a larger pop-out window. Also, there is a price range listed with the products.
You can create a presentation very easily from the planner. Click the link at the bottom (or the "Send to Presentation" button in upper right hand corner) and the presentation will open.

The Event Planner covers major distributor programs like golf outings, safety initiatives, and school programs. Events are created in one click and easily modified with additional products. It also includes program ideas and advice from ASI's magazine editors. Additionally, there are three price tiers available for each event to meet the budget of every client.