Thank you for your interest in using ecomdash for your ecommerce business. Here are steps needed to setup your storefronts, inventory and shipping integrations to get you up and running!
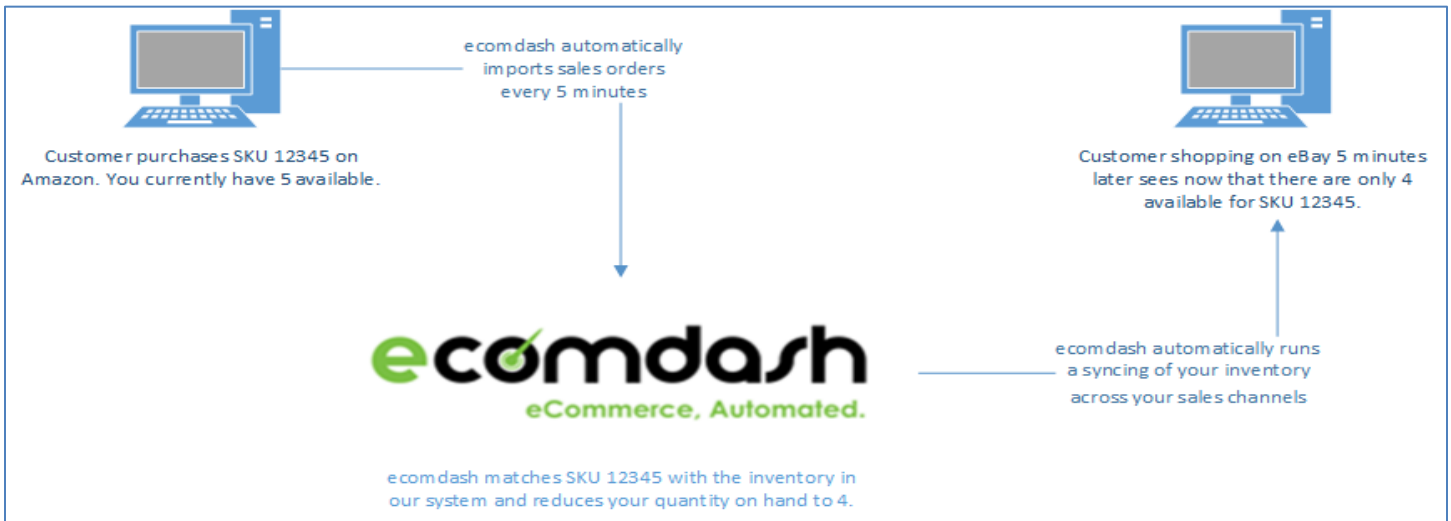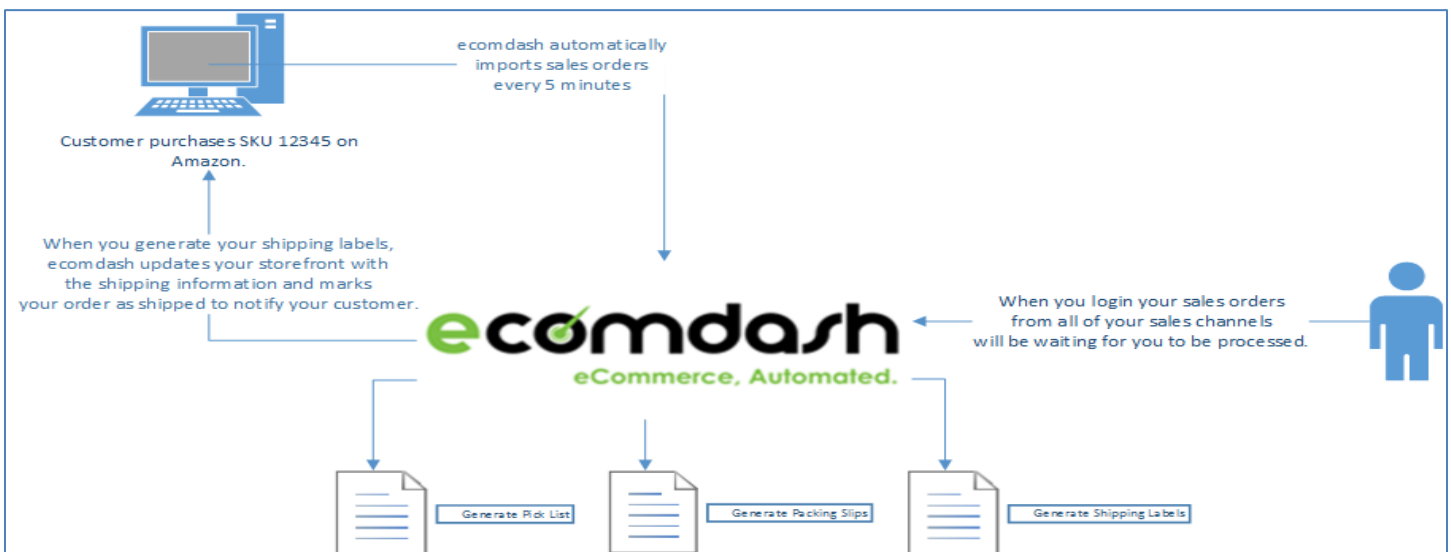
# Ecomdash Overview

## Summary

Ecomdash is an inventory and order management solution that enables business owners to sell across many sales channels without worrying about overselling products while adding efficiencies to order management.

## Inventory Management Workflow

ecomdash automatically imports sales orders every 5 minutes

Customer purchases SKU 12345 on Amazon. You currently have 5 available.

Customer shopping on eBay 5 minutes later sees now that there are only 4 available for SKU 12345.

ecomdash automatically runs a syncing of your inventory across your sales channels

ecomdash matches SKU 12345 with the inventory in our system and reduces your quantity on hand to 4.

## Order Management Workflow

ecomdash automatically imports sales orders every 5 minutes

Customer purchases SKU 12345 on Amazon.

When you generate your shipping labels, ecomdash updates your storefront with the shipping information and marks your order as shipped to notify your customer.

When you login your sales orders from all of your sales channels will be waiting for you to be processed.

Generate Pick List

Generate Packing Slips

Generate Shipping Labels

# Storefront Setup (Marketplaces & Shopping Carts)

## Summary

Once you setup your storefronts and integrate ecomdash with your sales channel, ecomdash will be able to import your sales orders, sync your inventory quantity and update your orders with your shipping information using the information provided in the following steps.

## 3D Cart

1. Under the **Administration Tab** click on **Storefronts**
2. Click the **Add Storefront** tab
3. In **Storefront Name** type the name of your store, select **online** from the dropdown arrow
4. Select **3dcart** as your **Ecommerce Platform**
5.  Click **Save** on the bottom of the screen

After clicking on **Save**, follow these instructions to integrate 3dcart to ecomdash:

1. Sign in to your **3dcart online store manager**.
2. Click on **Settings/General/Store Settings** link
3. Navigate to the **Advanced Settings** section and click on the **Change Settings link** next to the API Settings label
4. Check both the **Enable API** and **Enable Advanced API** boxes and click **Save Changes**
5. Copy the **API User Key** into the appropriate field
6. Enter the **Store URL** in the appropriate field (ex: xxxx-com.3dcartstores.com)

## Amazon

Before getting started with Amazon, you will need your **Merchant Token**, Your **Marketplace ID,** and **Merchant ID**. To get these values, follow the steps below:

1. Navigate to https://developer.amazonservices.com and click on the **Sign up for MWS**
2. Enter your **Amazon seller account username** and **password** and click on **Sign in**
3. Select the **3rd option**: I want to give a developer access to my Amazon seller account with MWS
4. Enter the Developer Name: **IMSLite - LTDSoftware** and Developer Account Number: **3760-0602-3565**
5. Click **Submit** and copy **the Merchant ID** and the **Marketplace ID** - You will need both of these values to set up your account

Once that is accomplished:

1. Under the **Administration Tab** click on **Storefronts**
2. Click the **Add Storefront** tab
3. In **Storefront Name** type the name of your store, select **online** from the dropdown arrow
4. Select **Amazon** as your **Ecommerce Platform.** Click **Save** on the bottom of the screen
5. Enter your **Merchant ID** and **Marketplace ID** in the appropriate fields
6. Finally, navigate to https://sellercentral.amazon.com and click on **Settings/Account Info** and copy the **merchant token**

## eBay

1. Under the **Administration Tab** click on **Storefronts**
2. Click the **Add Storefront** tab
3. In **Storefront Name** type the name of your store, select **online** from the dropdown arrow
4. Select **eBay** as your **Ecommerce Platform.** Click **Save** on the bottom of the screen
5. Saving activates the red **Enable eBay** button, click to bring up a new screen from eBay
6. **Enter** your storefronts **eBay username** and **password**
7. Click **I agree**

## Shopify

1. Under the **Administration Tab** click on **Storefronts**
2. Click the **Add Storefront** tab
3. In **Storefront Name** type the name of your store, select **online** from the dropdown arrow
4. Select **Shopify** as your **Ecommerce Platform**
5. Enter your **Store Name** in the appropriate field
6. Click **Save** on the bottom of the screen

After clicking on **Save**, follow these instructions to integrate Shopify to ecomdash:

1. Click on the **Enable Shopify** button and enter your **User ID** and **Password** and sign in
2. Once you are logged in you will prompted with the **Install ecomdash** screen
3. Click **Install App** and your storefront and your Shopify account will be linked and the Ecommerce Status will be updated to **Enabled**

## ZenCart

1. Under the **Administration Tab** click on **Storefronts**
2. Click the **Add Storefront** tab
3. In **Storefront Name** type the name of your store, select **online** from the dropdown arrow
4. Select **ZenCart** as your **Ecommerce Platform.** Click **Save** on the bottom of the screen

After clicking on **Save**, follow these instructions to integrate ZenCart to ecomdash:

1. Enter your **online store url** in the **Location (URL)** field and click on **Save**
2. Download the ecomdash ZenCart Integration PHP .zip file
3. Extract the **eComDashZenCartIntegration.zip** file and **copy the 2 included files** to the **root level** of your website. (Will need administrator access to your website for this step)
4. Open the **eComDashZenCartSettings.php** file and **follow the instructions** there to generate an **access token**
5. Copy the **access token** generated into the eComDashZenCartSettings.php file to the **Cart Access Token** field and click **Save**
6. Click on **Test Cart Access** to test the integration between ecomdash and your ZenCart shopping cart on your website

# Shipping Setup

## Summary

Once you setup your shippers and integrate ecomdash with your preferred carriers, ecomdash will be able to generate your shipping labels based on the shipping settings you define. You will also be able to manage your shipping account to add postage and initiate returns from within ecomdash.

## Endicia

1. Under the **Administration** tab click on **Shippers**
2. Click the **Add Shipper** tab
3. Select **USPS (Endicia)** from the dropdown arrow
4. Create a **new Endicia account (if needed)** OR if you already have an account enter the **account ID** in the appropriate field
5. Enter your **temporary pass phrase** in the **Current Pass Phrase** field
6. Create a **New Pass Phrase** and enter it in the appropriate field
7. Click **Save** at the bottom of the page

## Stamps.com

1. Under the **Administration** tab click on **Shippers**
2. Click the **Add Shipper** tab
3. Select **USPS (Stamps.com)** from the dropdown arrow
4. Enter your **Stamps.com user ID** and **Password** in the appropriate fields
5. Click **Save** on the bottom of the page

# Inventory Setup

## Summary

Inventory Management within ecomdash provides you a real time view of your products, their availability, their value and history. Once setup, ecomdash is able to manage your inventory by using purchase orders and sales orders to track the inbound and outbound stock.

## Bulk Inventory

1. You will need your current inventory in a .CSV format. Typically this is a format you can use Microsoft Excel to open and "Save As" a .CSV (comma separated values) format.
2. Your current inventory file should have a column for SKU, Product Name, and Product Quantity on Hand at a minimum.
3. If you have your inventory currently in Amazon or another marketplace, typically you can generate an inventory report in a CSV format out of the system.

Once you have your current inventory in a CSV file you need to create a matching format in ecomdash:

1. Under the **Administration** tab click on **Inventory Import/Export Format**
2. Click the **Add New Format** button
3. Enter a reference name for example Initial Inventory Setup and click the **Add button**
4. If you plan to sell your products on all of your storefronts, **select "All" from the storefront dropdown**. If not, select the storefront you plan to have these products available on
5. From the **Product Field dropdown**, add the fields to create a reusable template which matches your current inventory CSV file**. Example** – if in your CSV file your SKU Number is the first column, then select SKU Number from the Product Field and click Add Field to make that the first column of your template. Repeat to create a mapping
6. When you are done mapping, click **Save** to create a reusable template

Now that you have your inventory in a CSV file and created a reusable template in ecomdash to map the fields, all you need to do is upload the file:

1. Click on **Inventory** and then **Inventory Management**
2. Click on **Upload Inventory** button
3. Select from the **Import Inventory Format** dropdown the Import Format you created
4. From the **Upload Inventory** – select **Choose File** and navigate to your CSV file and Select Open
5. Finally, select the **Upload button** which will begin the process of creating your entire inventory

# User and Company Setup

## Summary

There are many settings available to help customize ecomdash to your specific business needs. All of the customization is located within the Administration section of ecomdash.

## Company Details

Under the **Administration** tab click on **Company Details**

1. **Enable Dropship Management** allows you to create extracts of your order information to be supplied to your warehouses for fulfillment.
2. **Product Lookup Rule During Import** defines the order you want ecomdash to try and make a match to sales orders we import.
3. **Label & Print Settings** allows you to define the shipping printouts such as packing slips and shipping labels format.
4. If you plan to be send emails to your customers out of ecomdash, the **Mandrill API User Key** is needed.
5. If you want ecomdash to automatically import your sales orders, check the **Auto Import Sales Orders** box and define the frequency you want that to take place.
6. If you want ecomdash to automatically sync your quantity on hand across your marketplaces, check the **Auto Sync Inventory** checkbox.

## Payment

To move out of Trial or manage your payments with ecomdash:

1. In the top right of ecomdash click the **Profile Button**
2. From within the User Profile screen, select the **Account Information Tab**
3. Select **Start Subscription**
4. Please review the ecomdash user agreement and **select Accept** on the bottom and **click Continue**
5. From the **Account Payment Information** page select your Payment Option and **Continue to PayPal** button
6. This will move you to Paypal to setup your specific payment setup.

## Support

If you have any questions or need any help on setup, please do not hesitate to contact us at
[support@ecomdash.com](mailto:support@ecomdash.com)