



Getting Started

This chapter is an overview of AbleCommerce Merchant Administration. It briefly describes each area of the online administration used for building stores and maintaining inventory, initial store setup for shipping and taxes, and processing orders and customer comments.

Tips:

Click the  button in the upper-right corner of any page to close.

The Preview button will show you changes, the Finish button will permanently make the changes.

Click the  button for a direct link to the documentation for that page.

There is a system administrator that can change certain global settings for your store. These settings will be indicated.

Merchant menu

During your first attempt to access the Merchant Menu, you should be prompted for your User Name and Password. This information must be entered with case sensitivity. The system administrator provides the login information and URL.



The image shows a login window titled "Please enter your user name and password". On the left is a logo consisting of a circle with a stylized 'G' inside, and the text "SESSION TIME-OUT" below it. To the right of the logo, the text "Please enter your user name and password for access to the selected Store Group." is displayed. Below this text are three input fields: "User name:" followed by a text box, "Password:" followed by a text box, and "Store Group:" followed by a dropdown menu currently showing "Demo Stores". At the bottom center is a "Login" button.

FIGURE 1. Login Screen

When prompted by the above login page, enter your assigned user name and password. Click Login to access the Merchant Menu for your store.

Once you have accessed the Merchant Menu, a cookie identifying you as a merchant administrator is stored in your browser. You will be prompted with the login page if there is no activity for more than 10 minutes.

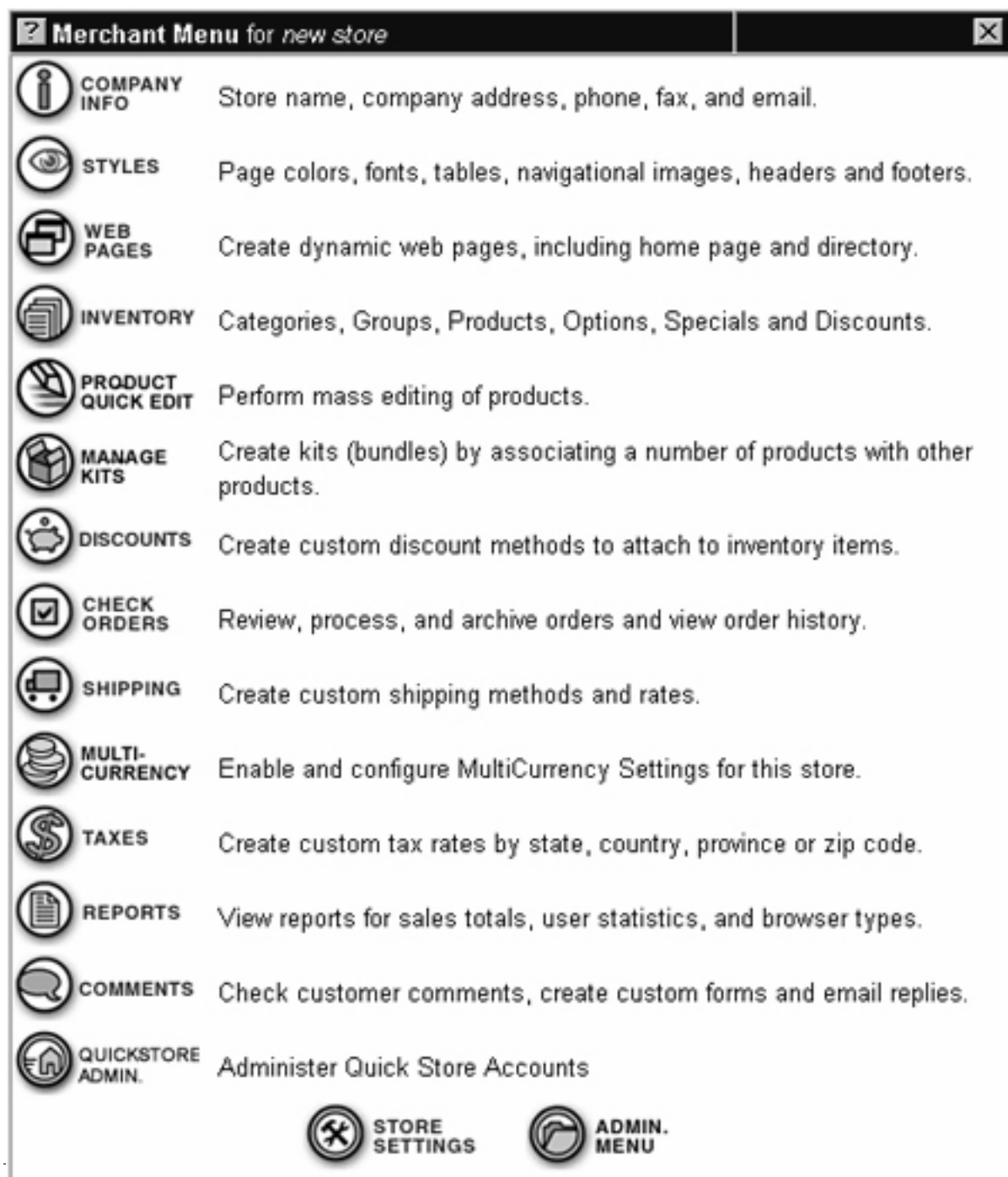


FIGURE 2. Merchant Menu

Note: *The Shipping image will not be available until you have turned shipping on and the QuickStore Admin image will not be available unless you sell a QuickStore.*

The Merchant Menu is the main menu for store administration. Bookmark this page.

The right frame has clickable images to each of the main areas of the Merchant Menu, from this you can access Company, Styles, Web Pages, Inventory, Discounts, Orders, Shipping, Tax Rates, Reports, and Comments at all times. The Shipping image will appear if you turn shipping on and the QuickStore Admin image will appear if QuickStore has been sold.

The Home image displays the store's home page as viewed by the retail shopper. The Merchant Menu image displays the Merchant Menu administration page as shown in Figure 2.

Company

Customization of a new store begins with your company contact information.

The Company image takes you to the Company Information page where you can change the name of the store. Add your company contact information for the invoice generated at checkout, and enter a URL to your home page.

For more information on setting up company information, see Chapter 2 “Company”.

Styles

You can customize a Style with page and text colors, fonts, table colors, and navigational images. A Style can then be applied to any dynamic page in your store. You can add unlimited Styles and apply them to individual pages through any Wizard Editing area. This feature gives you the ability to have a unique style for every dynamic page in your store.

For more information on setting up a style, see Chapter 3 “Styles”.

Web pages

The Web Page editor allows you to create unlimited dynamic pages. You can use your own HTML and the web page wizards to create custom pages that can be easily updated.

From Web Pages, you can edit all your dynamic pages and use the wizards available to your store. Your store size will determine what wizards are available. Only a system administrator can change a store size or available wizards.

There are three types of web pages available: home page, directory page, and unlimited auxiliary pages. Only one home page and directory page can be used, but you can create unlimited auxiliary pages that still have the same wizards available. The source code for a link and button for each page you create are provided in the Web Page Editor. By activating a Web Page wizard option, you may have links to all of your active web pages displayed in a row for instant site navigation on any dynamic page.

Web pages in relation to store sizes:

A store's size determines what links are output in the navigation bar and where they link to. A small store uses the 'home page' and the navigation bar will automatically link to this page only.

A medium store uses the dynamic 'home page' and 'directory page'. The navigation bar will automatically link to both of these pages.

A large store uses the dynamic 'home page' which outputs links to navigable category pages. The navigation bar generates a link to the current category page. A large store can also use the 'directory' page, but you will need to provide a separate URL.

For complete instructions on using web pages and wizards, see Chapter 4 “Web Pages”.

Inventory

All products are created and maintained through Inventory. There are three levels to the Inventory structure: Category, Group, and Product.

A new store starts with two default Categories. Each Category is assigned two default Groups and each Group contains a default Product. You can navigate the administration pages by selecting a Category title and click the Next button to view Groups in that Category. Select a Group title and click Next to view the Products in that Group.

Groups or Products can be active or inactive. An active one means it can appear for the retail user. A Category is always active but will only appear if there is at least one active group and product attached. If you inactivate a Group, all attached Products will disappear from the retail side. You can move entire Groups and related products to a different Category or move Products to a different Group.

Each of the Category, Group, and Product editing areas have wizards that can be selected for different page layouts. In addition, you can change wizard options to further customize the page. Category, Group, and Product pages become navigable if more than one of each is activated.

Categories are generally used by medium and large stores. A large store is the only one to offer navigable Category pages and the associated wizards. A medium store can use Categories, but they will generally be used on a Directory page. A small store uses a single Category only to hold the Inventory relationship together; in this case the title is irrelevant since it won't be displayed for the retail user. A Category can have an image, 255-character description, and/or sorting assignment.

Groups are used for product categorization. Navigable Group pages can be used by any size store. A Group can have an image, 255 character description, and/or sorting assignment. Using Group wizard options, you can output product titles and description links to product detail pages and "option-to-buy" buttons.

Product pages are used to show detailed information about a product and give the retail shopper an "option-to-buy". A Product can have up to three images; a small icon for display on the previous Group page, another for display on the product detail page, and yet another for an extensive product detail page. Three product description fields are available; a short 255-character description for the Group page, a 64,000 character description for the Product detail page, and another 64,000 character description for the extensive Product detail page. A Product can have a retail price, standard price, special price, discount, up to three descriptions, SKU, weight, unit, and sorting assignment.

A product can have multiple levels of options. Each product can have custom option title(s) and unlimited number of options for each. These options can be assigned to a product with a base price to have an option "add-on". Options can have their own SKU, price, weight, and sorting assignment.

Discounts

You can setup custom discount methods and apply them to your categories, groups, or products. Discounts can be a percentage off a product or a dollar amount off a product. Set minimum and maximum purchase requirements for discounts to apply. There is no limit to the number of discounts that may be applied.

For more information on customizing discount methods, see Chapter 6 "Discounts".

Orders

After a retail shopper completes an online transaction, a new order will appear in the Merchant Menu's Order page. A summary of all unprocessed orders is displayed with a link to the Order Detail page. After an order is processed, you can either delete it or archive it for future reference. The Order Detail page has the billing and shipping addresses, payment type, credit card information, and the items ordered. By activating a single wizard option, you can allow your customers to view their past and present orders.

For more information on processing orders, see Chapter 7 “Orders”.

Shipping

The system administrator must assign your store's shipping class. International shipping may be an option selectable by your system administrator. There are six types of shipping classes available.

- A) - Calculates shipping using a flat fee added to each order.
- B) - Calculates shipping using a flat fee plus a weight fee.
- C) - No shipping charges applied. (Optional: Add shipping as a product option.)
- D) - Calculates shipping based on the price range of an order. (Matrix: price range - fee)
- E) - Calculates shipping based on a percentage of the total order amount.
- F) - Calculates shipping based on the total weight of the products in the basket. (Matrix: weight range - fee)

You can add, edit, and delete custom shipping methods. For more information, see Chapter 8 “Shipping”.

Tax rates

You can setup custom tax rates by assigning a base percentage to the state that requires the sales tax. Sales tax will only be added to an order where the shipping location is the same as the state requiring taxes. Some states require that shipping charges be taxable; you may easily set this in Tax Rates.

For more information on setting up taxes, see Chapter 9 “Tax Rates”.

Reports

There are many reports that are available for the merchant. All of these can be adjusted to the exact time period you specify. Additionally, some reports can be further broken down by category, group, or user.

Product Sales: A Product Sales report will give you information on all products such as quantities sold and sales totals.

Sale Totals: A Sale Totals report will give you dollar figures for gross product sales, sales tax, shipping charges, or any combination thereof.

Sales Tax: A Sales Tax report will give you a list of states that have been assigned a tax rate for which tax has been collected.

Shipping Charges: A Shipping Charges report will give you a list of shipping methods that have been used for all completed orders.

User Statistics: The User Statistics report will display all users that have accessed any page in your store. A report displays the user's I.P. address, browser type, and first and last visited dates.

Browser Types: The Browser Type report will display the different types of browsers being used to view your store. A report displays the number of users for each browser type and the overall percentage.

Current Inventory: From here you can view reports on your inventory items that are out of stock, less than or equal to the reorder level, or within a predefined stock quantity.

View Log Files: The Log Files can be created on a daily, weekly, or monthly basis. All Log Files for your store will be available from the selection list. You may decide to download the files and use a reporting program.

For more information on reports, see Chapter 10 "Reports".

Comments

The Comment page allows you to view, archive, or delete comments entered into your default guest book or a custom form. Your store will include a default guest book and reply page. You can create unlimited custom forms to collect user information. Each form you create can have a custom reply page attached and a custom email response. You can add unlimited fields to your form for even more customization. The source code is provided for a link or a post button to any page you create.

For more information on reports, see Chapter 11 “Comments”.

This chapter contains information to setup a store's company information. There are a number of store settings that can only be set by your system administrator; these are briefly covered. Please contact your system administrator if you want to change your store's global settings.

Company information

The first step to customize your store is adding your company information. This is used during the checkout process to provide your customers with contact information regarding their order. A customer invoice is generated with your store name, location, and phone number. If the customer has questions about his or her order, they will be using the contact information provided here. The invoice also contains an order number along with the date and time the order was placed.

If you are going to use the automatic email notification feature, you will need to provide an email address. This should be a person responsible for processing orders. Each time a customer completes a checkout, an email message with the item purchased and customer information is sent to the merchant. Credit card numbers will not be sent through email, you must login to your store and use a secure connection to process your orders.

If your store accepts orders by fax, you must provide a correct fax number that is available 24 hours a day. If fax is selected as a payment option, the customer will print an invoice of the order and send it to you with payment information. A completed order with all payment details can also be automatically sent using a compatible Fax

Gateway such as the ProtoFax Server. This is an alternate method available to securely process your orders without having to access your store.

Figure 3 shows the fields available from the Company setup area. If AbleShipper is disabled, you will not see the additional field for FOB Zip.

Company Information for A QuickStore

Store Name: A QuickStore R

Address 1: 5139 NE 94th Ave. R

Address 2:

City: Vancouver R

State: WA

Zip: 98662

Country: United States

Currency Format: English (US) -- \$1,234.56

Date Format: mm-dd-yyyy -- 10-09-2000

Time Format: h:mm tt -- 9:37 AM

Phone: (360) 253-4142 R **Fax:** (360) 253-2136

Email: info@ablecommerce.com

Home URL:

Use Home URL only to override the default home page created in Web Pages.
(i.e. http://127.0.0.1/index.cfm)

Click **Preview** to see your company settings, then **Finish**

FIGURE 3. Company Information

To customize your contact information or store name:

1. From the Merchant Menu, click Company Info.
2. Enter the name of your store or company in the Store Name text box.
3. Enter your business address in the Address text box.
4. Enter your business postal (zip) code in the Zip text box. If you have enabled AbleShipper, an additional text box will appear named FOB Zip. If the shipping point zip code is different from the standard advertised company zip code, enter the shipping zip code into the FOB Zip text box.
5. From the Country drop-down box, select the country your business is located in.
6. From the Currency Format drop-down box, select the currency your country uses.
7. From the Date drop-down box, select the date format you want to use.
8. From the Time drop-down box, select the time format you want to use.
9. Enter the company's phone number in the Phone text box.
10. Enter your company's fax number in the Fax text box. If you are going to accept the Fax-In payment method, this number should be available 24 hours a day.
11. Enter an email address if you will be receiving automatic email order notification.
12. Enter a fully qualified home page address **ONLY** if you will **NOT** be using the default home page created in Web Pages. (i.e. Stores with their own domain name may enter an alternate home page location.)
13. Click Preview to view your changes, if satisfied, click Finish to complete Company Information changes.

Global settings

Global settings can only be setup and changed by your system administrator. These include your store size, shipping class, payment methods, user rights, order notification, secure domain, and log files. Not all options may be available to you, please contact your system administrator for more information.

There may be additional costs, from your system administrator, associated with changing your store's global settings and implementing certain features.

Store Size: Choose from small, medium, or large. This is largely dependent on the number of products you plan to maintain. Consult your system administrator for a size that best suits your needs. You can also have up to 15 different levels of options per product. This feature is quite handy for selling a build-your-own computer system where there are many components available.

Shipping Class: Choose from six different types. Determine a proper shipping class for your store. You can setup and customize your own shipping methods and rates. (i.e. Federal Express, UPS, Postal, etc.)

- **Class A:** Calculates shipping using a flat fee per order.
- **Class B:** Calculates shipping using a flat fee plus a weight fee. Your products **MUST** have a weight attached for the shipping charges to be calculated correctly.
- **Class C:** No shipping charges applied or add shipping as a product option.
- **Class D:** Calculates shipping based on the total order amount. (Matrix style)
- **Class E:** Calculates shipping based on a percentage of total order.
- **Class F:** Calculates shipping based on the total weight. (Matrix style)

You can also have your system administrator enable International Transactions, AbleShipper, Zip Code verification at Checkout, and Delivery by Electronic Download.

Payment Methods: Choose from Visa, MasterCard, American Express, Discover, Fax Order, Call Me, and five popular real-time payments processor methods. You can even allow purchase orders for established members.

Inventory Management: Enable this feature to allow selling of items you have in stock. Stock values deplete when an order is processed, and notifications may be sent to the merchant that quantities are low.

Multiple Users: You can have more than one person using a store's merchant administration. A separate user name and password for each person will be required for login. You can also establish a member /non-member store with alternative pricing and displays dependent on user login.

Order Notification by Email: You may have an email message automatically sent to you and/or the customer placing the order. Sensitive credit card information will not be included in the email notification so you will need to login to your store to process your orders. If you choose to have an email sent to the customer confirming the order, you should require the customer to enter a valid email address.

Order Notification by Fax Gateway: If an email to fax gateway is available such as the ProtoFax Gateway, you can have the entire order automatically faxed to you. This will include all details of the order including credit card information. This enables a merchant to receive orders without having an Internet connection.

Secure Domain: If you have your own domain name and/or your own secure certificate, you can have your system administrator setup your store to use them. If you do not have your own secure certificate, you can use the one provided by your system administrator. We do not recommend sending sensitive credit card information over a non-secure connection. Some credit card companies have written policies on this.

Log Files: You can have log files generated on a daily, weekly, or monthly basis. Using the standard extended file format, these can be downloaded for use with any compatible reporting program such as WebTrends. There are also built-in reports that are available such as user statistics, total sales amounts, and browser types.

This chapter contains information on setting up Styles. You can customize a Style with page and text colors, fonts, table colors, and navigational images. A Style may be applied to any dynamic page.

Add or delete styles

In a new store, there are two Styles already in use. The store's Default style applies to all dynamic web pages and the Basket style applies to all checkout pages. You can easily change the properties of the Default style to modify colors, fonts, and navigational images of all your pages in one step. The Basket style is required and will be the default Style used for the checkout pages.

The Basket Style will be used as the default for all Checkout pages unless the optional Unique Style names are used. This allows you to have a custom Style for each page of a checkout process. You only have to make a copy of an existing Style and rename it to one of the Style names listed below.

- **Billing:** Unique Style name applies to the page a user inputs their billing information.
- **EditItem:** Unique Style name applies to the page that follows the linked product title in the basket.
- **Payment:** Unique Style name applies to the page that asks the user to input a credit card number.
- **Receipt:** Unique Style name applies to the final invoice page. This page should be printed so use of black backgrounds is not recommended.

- **SelectMethod:** Unique Style name applies to the page that asks the user to select a shipping and/or payment method.
- **Shipping:** Unique Style applies to the page a user inputs their shipping information.

Two additional unique styles may be used to apply page properties and headers and footers to the FormBuilder pages and the Customer Viewing Order page.

- **Comments:** Unique style name applies to all pages created with FormBuilder. This includes the default Guest Book page.
- **Orders:** Unique style name applies to the page that enables the customer to view past and present orders.

You can add unlimited Styles and apply them to individual pages through any Wizard Editing area. This feature gives you the ability to have a unique style for every dynamic page in your store.

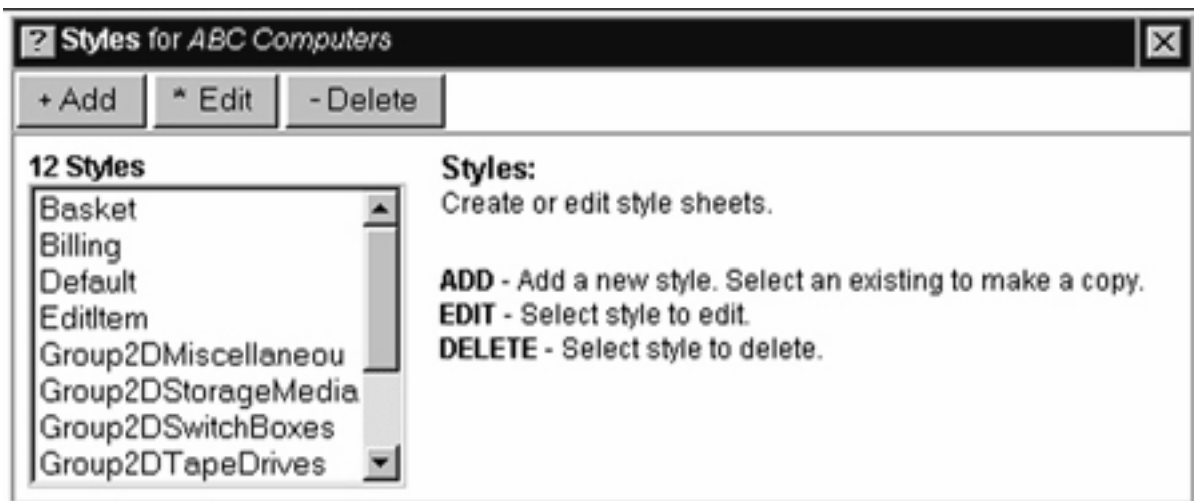


FIGURE 4. Styles

To add a style:

1. From the Merchant Menu, click the Styles image.
2. To make a new Style, click the Add button.
3. To make a copy, select an existing style and click the Add button.
A new Style is created.

To delete a style:

1. From the Merchant Menu, click the Styles image.
2. Select an existing Style and click the Delete button.
3. A confirmation page will follow, click Yes to permanently delete the Style.

The Style named Default is used as the default Style for all dynamic wizard pages. Create more Styles for the wizards pages and attach through any wizard editor.

Editing styles

Select a Style from the menu and click the Edit button. Figure 5 shows the Style Settings page.

?
Style Settings for New Style
X

Colors
Images
Header 1
Header 2
Footer 1
Footer 2
Footer 3

Style:
(R) Attach a style through any wizard editor.

Apply Style to the Wizard pages. (Required)

Font Size:
Font Face:
Table Border:

Apply Style to Inventory Navigation Bar. (Required)

Font Size:
Font Face:
Table Border:

Preview
Update
Finish

Click the **Colors** button to change the table colors below. (TABLE COLORS ARE OPTIONAL)
Samples of both font faces are shown below in sizes 4, 3, 2, 1.

Table Color 1: Used by some wizards in the **title** bar above the main content.
Table Color 1 **Bold** *Italic* **BoldItalic** Link Active Visited
Table Color 1 **Bold** *Italic* **BoldItalic** Link Active Visited

Table Color 2: Used for the main content area of any selected wizard.
Table Color 2 **Bold** *Italic* **BoldItalic** Link Active Visited
Table Color 2 **Bold** *Italic* **BoldItalic** Link Active Visited

Table Color 3: Applied to the **Inventory Navigation Bar**.
Table Color 3 **Bold** *Italic* **BoldItalic** Link Active Visited
Table Color 3 **Bold** *Italic* **BoldItalic** Link Active Visited

Table Color 4: Used in product wizards below the main content.
Table Color 4 **Bold** *Italic* **BoldItalic** Link Active Visited
Table Color 4 **Bold** *Italic* **BoldItalic** Link Active Visited

Preview
Update
Finish

FIGURE 5. Style Settings

To edit a default or custom style:

1. Enter a new Style name into the first field. If you are editing the Default style, you will not be able to change the Style name.
2. Enter a new Font Size for wizard pages if desired. This is applied to the items that may be output with wizard options. (i.e. Guest Book text, Web Page navigation links, and additional navigation select lists.)
3. Enter a new Font Face for wizard pages if desired. This is applied to web page, category, group, and product wizards.
4. Enter a Table Border Width for the table that surrounds the wizard output. Enter a value of '0' for no table border.
5. Enter a new Font Size for the text displayed in the Inventory navigation bar.
6. Enter a new Font Face for the text displayed in the Inventory navigation bar.
7. Enter a Table Border Width for the table that surrounds the Inventory navigation bar. Enter a value of '0' for no table border.

Items 1 through 7 are required fields. When using custom fonts, it is important to remember that not all browsers support fonts other than Times, Arial, or Courier. If you select a font other than the default, a user will have to have that font installed on their local system in order to see it. If a user doesn't have a font face you select, it will default to a font that is supported.

You can use up to four different table colors that are shown on the Style Settings page. Click the Colors button to customize. At any time, you can click the Preview button to see your Style settings. If satisfied, click Finish to complete the Style changes.

To edit a basket style:

Note: *The Basket style name cannot be changed.*

1. Enter the Font Size for the primary titles of the checkout pages.
2. Enter the Font Face for the primary titles of the checkout pages.
3. Enter a Table Border Width for the tables used in the checkout pages.
4. Enter the Font Size for the secondary information used for address information and the basket contents.
5. Enter a Font Face for the secondary information and basket contents.

The basket and checkout pages can use all four table colors. Click the Colors button to customize. At any time, you can click the Preview button to see your style settings. If satisfied, click Finish to complete the style changes.

Colors

Customize your Style using different colors for the background, text, links, and four table colors. From the Style Settings page, click Colors. Table Colors are used differently depending on the type of Style you are editing.

If your browser does not support Java script, you will be presented with the Color Options page and nine color fields. Enter a six digit hexadecimal color into the appropriate fields. If you leave all the fields blank, the default browser colors will be used and your tables will not have color.

Table Colors applied to any wizard page: (Style name is 'Default' or a new Style name.)

- Table Color 1 - Used by some wizards in the title bar above the main content.
- Table Color 2 - Used for the main content area of any selected wizard.
- Table Color 3 - Applied to the Inventory Navigation Bar.
- Table Color 4 - Used in product wizards below the main content.

Table Colors applied to the shopping basket: (Style name is 'Basket'.)

- Table Color 1 - Applied to the title bar of the basket.
- Table Color 2 - Used for the second row of the basket showing descriptions and pricing. Also used for the subtotal line.
- Table Color 3 - First row displaying item information in basket; alternates with Color 4 as items are added. Also used for the row with the buttons.
- Table Color 4 - Second row displaying item information; alternates with Color 3 as items are added to the basket.

Table Colors applied to checkout pages: (Style name is 'Billing', 'EditItem', 'Payment', 'Receipt', 'Select-Method', 'Shipping' - these are optional and should be used when you need different headers and footers or colors for each checkout page.)

- Table Color 1 - Applied to the title bar which is used for user instruction.
- Table Color 2 - Used for main content (billing and shipping information). Also used for the second row of the basket.
- Table Color 3 - Used in the area where a user selection or input is required. Also alternates with Color 4 for each item row in the basket.
- Table Color 4 - Used for alert colors on required fields. Also alternates with Color 3 for each item row in the basket.

If you have a supporting browser and you select the Colors button from the Edit Style page, you will be presented with a Java Script Color Picker for easy selection of standard palette colors.

We highly recommend using the Java based color picker that is available if you are using Netscape Navigator 3.0 and better or the latest version of Microsoft Internet Explorer 4.0. The page may take a moment to load, but it will be well worth the wait.

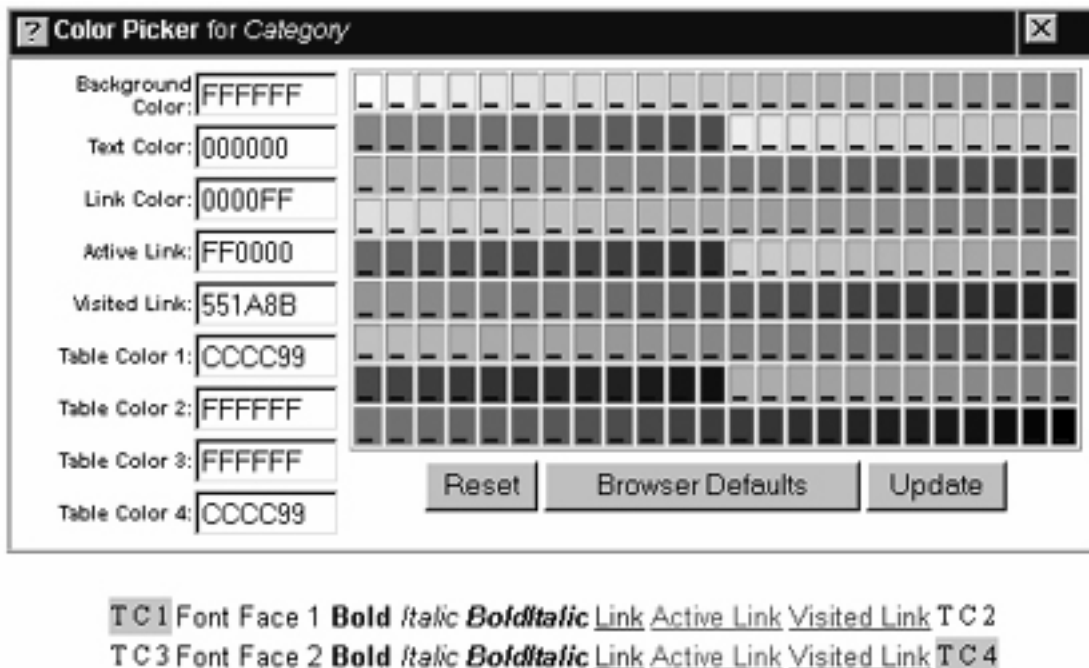


FIGURE 6. Color Picker and Preview

To add colors with the java color picker:

The Reset button will set your values to their original settings and the Browser Defaults button will set your values to the default browser settings.

1. Click your cursor in one of the nine color fields.
2. Click one of the colored cells to change or add a new color in hexadecimal format.
3. Continue adding colors in this same manner, as you do, the bottom frame will be updated to show your current selections.

4. When finished, click Update to return to the Style Settings page.
5. You can preview your font choices, font colors, and table colors. If satisfied, click Finish to make changes permanent.

Images

The three types of navigational items that require images are main navigation bar for browsing inventory pages, home navigation, and the checkout image.

You may not need to use all the images available in your store. To see what you are currently using, click Preview from the Style Settings page.

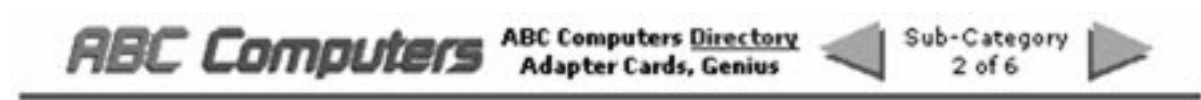


FIGURE 7. Main Navigation Bar

The Main Navigation Bar is used to browse the inventory pages. It can be activated at the top or bottom of any category, group, or product page with the selection of a wizard option. The home image will be used to automatically link to your home page. Forward and Back navigational arrows will be used to browse through multiple category, group, or product pages. If you decide to limit the number of items being displayed on a page through wizard editing, you will need to have the optional page navigation images.



FIGURE 8. Checkout Image

A checkout image is required. This enables a retail shopper to check the contents of their shopping basket at any time and continue with the checkout procedure. The checkout image is displayed near the bottom of every dynamic page in your store. When a shopper adds an item to their basket, they will have the option to view the contents of their basket each time an item is added or only when the checkout image is clicked. You can disable the checkout image by de-selecting the wizard option, 'Hide Checkout Image'.

To add custom navigational images:

1. From the Style Settings page, click the Images button.
2. Click the Modify button next to any image field that needs to be changed.
3. From the Image Properties page, your current image file name is shown in parenthesis if one is currently selected. The image width and height, alignment, spacing, and border may be modified from here.
4. You can click the Image Picker button to easily view a listing of all images currently available to your store.
5. From the left frame, click an existing image file name link from the available list to view the same image in the right frame. The image is shown in actual size with its width and height information.
6. After you have selected the image to use, click the Use This Image button to return to the Image Properties page.
7. Select your image properties: alignment, horizontal spacing, vertical spacing, border, and alternate text. Newer browsers will display your alternate text on mouse over.
8. Click Update to return to the previous page and view the image source code generated from your selections.
9. Repeat as necessary, starting at Step 2.
10. When finished, click Update to return to the Style Settings page.
11. Click Preview to see your new images, if satisfied, go back to Finish and make Style changes permanent.

Hints for uploading images: Use the Upload Image Browse button, change the Files of type selection to All files (*.*), and search your local hard drive or network drive for images to upload. Select an image file (*.gif or *.jpg) and click Open. This will insert the path and file name into the Upload Image field. Click Upload. Check the box to overwrite an existing image with the same name. **Note:** *This feature will only be available if your system administrator enables browser uploads.*

Headers and footers

You may use custom headers and footers with any of your dynamic pages. The placement of Header 1, Header 2, Footer 1, Footer 2, and Footer 3 is shown in each wizard example throughout the documentation. In general, they are placed between automatically output information for maximum flexibility. With this in mind, creative HTML users could start tags in a Header or Footer field to affect the output of the next item. Remember to end your tag in the next available custom Header or Footer field.

Also note, if you use the WYSIWYG editor on a header or footer, it may have unintended results. Headers which have start tags but not end tags will be “corrected” if edited with the WYSIWYG editor. For example, if the header contains “<table><tr><td></td></tr></table>”.

Each Header or Footer field can accept up to 64,000 characters of your custom HTML. It is important to remember that automatic formatting with styles will NOT be applied to your custom text. Headers and Footers can be individually activated through any wizard editing area.

This chapter describes the process of creating dynamic web pages and using web page wizards.

Add or delete pages

The Web Page editor enables you to create unlimited dynamic pages. You can use your own HTML and the web page wizards to create custom pages that can be easily updated and maintained.

To add a web page:

1. From the Merchant Menu, click the Web Pages image.
2. To make a copy, select an existing web page and click the Add button.
3. To make a new page, click the Add button without selecting an existing page.

A new page is created with a title of 'New Web Page' and it is set to inactive.

To delete a web page:

1. From the Merchant Menu, click the Web Pages image.
2. Select an existing web page and click the Delete button.
3. A confirmation page will follow, click Yes to permanently delete the page.

Editing pages

There are three types of dynamic web pages available. Each store may only have one default home page and directory page. You can create unlimited auxiliary web pages using the general type selection. Wizards may be used with any type of web page.

Tips:

- HTML source code is available at the bottom of the Web Page editor. Copy it into another page to create a hypertext link or form button to that page.
- Click Use WYSIWYG (What You See Is What You Get) Editor to easily design your pages without knowledge of HTML.
- Create a reference to an existing image in your store's image directory by adding and modifying the following HTML: ``

Figure 9 shows an example home page in the Web Page editor. The Page Title is the only required field. You must select from Home Page, Directory, or General for the Page Type. Only one Home Page and Directory page can be used per store. You may create an unlimited number of General web pages. The links to the Home Page and Directory are automatic, the source code for a link or button to your web pages can be found at the bottom of the Web Page Editor.

For each page you create, it can be automatically included in a wizard option that is available from any Wizard Editing area. The wizard option is called 'Web Page Navigation Links' and will output an image with or without text as a link to each page you activate. You may use your own sorting characters such as 1,2,3 or A,B,C to output the links to your pages in the order you want them to appear.

The Page Top, Middle, and Bottom fields are for your custom HTML. If you would like to use a wizard, then one of these three page areas will be replaced by the wizard output.

Web Page Editor (HomePage)

Finish

Preview

Wizard

Page Title:

HomePage

[Required]

Page Type:

Home Page

Select the type of web page, only one 'Home Page' or 'Directory' page can be used per store.

Web Page Navigation Links: The fields below are optional and are used with the Wizard Option 'Web Page Navigation Links' available from all Wizard Editing pages. You must activate the Wizard Option before the information will be displayed.

Activate:

☒

Check the box to activate automatic navigation to this page.

Sorted by:

Enter alpha-numeric character(s) for sorting of the links/images.

Image:

Modify..

Icon sized image to represent the link to this web page.

Image Properties:

Page Top: [HTML] Maximum 64,000 characters.

<center>

This is the Able Commerce demo store that sells quick
setup stores.

Use WYSIWYG Editor

Page Middle: *A wizard is currently being output in this location.*

Page Bottom: [HTML] Maximum 64,000 characters.

Use WYSIWYG Editor

Wizard

Preview

Finish

FIGURE 9. Web Page Editor

To edit a web page:

1. From the Merchant Menu, click the Web Pages image.
2. Select an existing web page and click the Edit button.
3. Enter a new Page Title into the field; this will appear in the title bar of a browser.
4. Select the Page Type; remember you can create only one home page or directory page.
5. Enter your custom HTML into any or all of the three fields available: Page Top, Page Middle, or Page Bottom. Maximum of 64,000 characters.
6. If you would like to use a wizard, then click the Wizard button. (A wizard can be used to replace the page top, middle, or bottom.) See “Wizards and Options” later in this chapter for available selections.
7. You may want to use the Wizard Option that displays a list of all your Active web pages. If so, you should check the Activate for Viewing box. You may also use the Sorted by field to assign a number to your web pages and override an alphabetical listing.
8. Click Preview anytime to see how your page will appear. All of your changes are being updated in a temporary location until you decide to finish.
9. Click Finish to make all changes permanent.

To add or modify the web page image:

1. From the Web Page Editor, click the Modify button next to the Image field.
2. The Image Properties page will show the file name of any current image selection with the ability to change image width, height, spacing, border, and alternate text.
3. Click the Image Picker button to add or change the current image.
4. From the left frame, click an existing image file name link from the list to view the same image in the right frame. The image is shown in actual size with its width and height information.
5. After you have selected the image to use, click the Use This Image button to return to the Image Properties page.
6. Select your image properties: alignment, horizontal spacing, vertical spacing, border, and alternate text. Newer browsers will display your alternate text on mouse over.
7. Click Update to return to the previous page and view the image source code generated from your selections.
8. When finished, click Finish to make Web Page modifications permanent.

Hints for uploading images:

- Use the Upload Image Browse button; change the Files of type selection to All files (*.*) and search your local hard drive or network drive for images to upload. Select an image file (*.gif or *.jpg) and click Open. This will insert the path and file name into the Upload Image field. Click Upload. Check the box to overwrite an existing image with the same name. **Note:** *This feature will only be available if your system administrator allows browser uploads.*

Web page layout

A web page consists of a combination of your custom HTML and automatically output information. Every web page has selectable options for turning on Headers, Footers, Navigation, and Wizards. A sample web page layout is shown in figure 10.

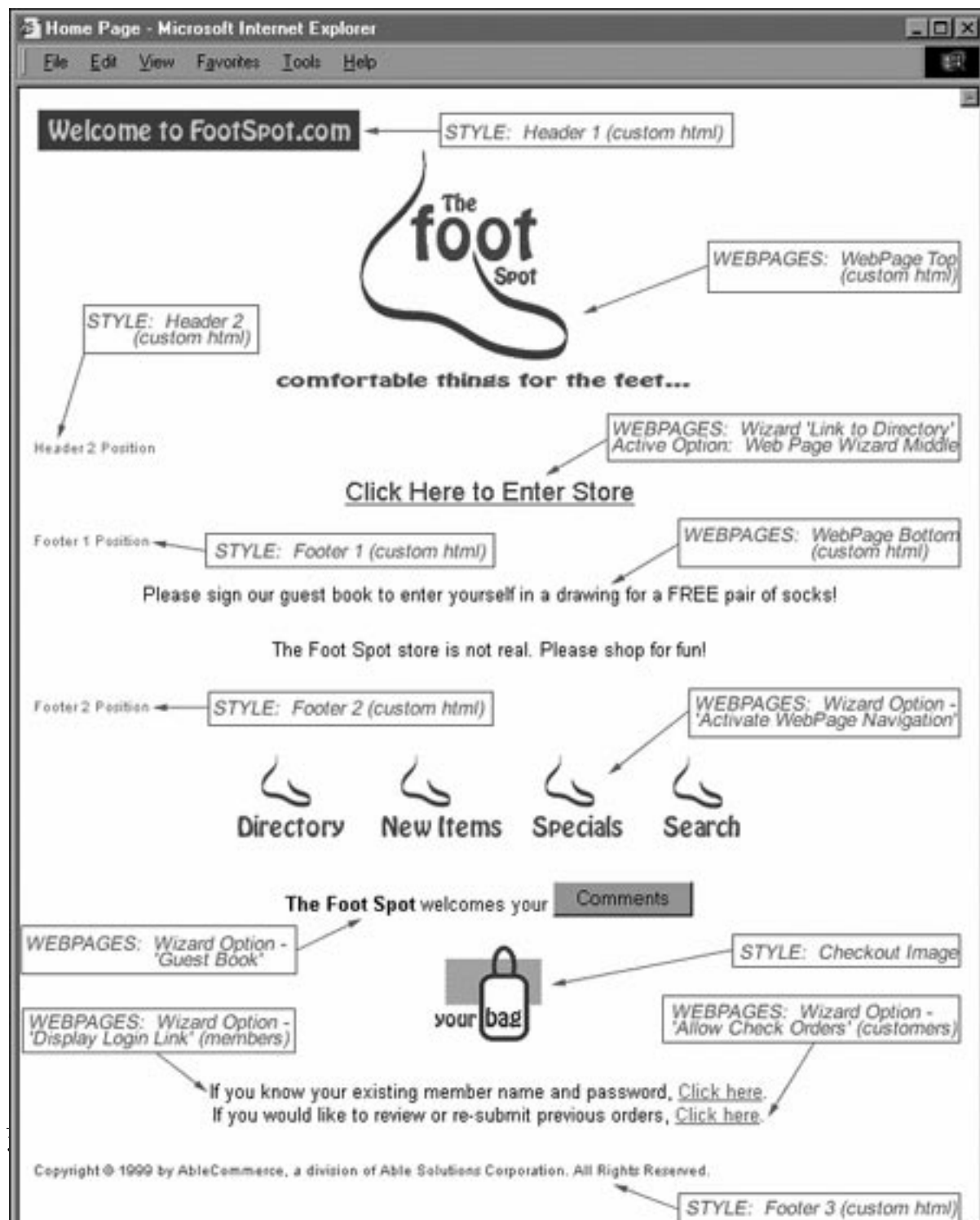


FIGURE 10. Web Page Layout

The order of output is designed to enable maximum flexibility by alternating automatic options with custom HTML fields. With this in mind, creative HTML users could start tags in a Header or Footer field to affect the output of the next item. Remember to end your tag in the next available custom field.

Use a wizard to output Category, Group, or Product links. A wizard outputs in the top, middle, or bottom area of your web page. To select a wizard, click the Wizard button from the Web Page Editor. Select a wizard from the available list and click Change; this will update the available options for that wizard. To output the wizard on your page, select one of the three available options: Web Page Wizard Top, Middle, or Bottom. This will output the selected wizard replacing one of the three custom fields on the your page.

The Style attached to your web page can be customized to change the following page properties: See Chapter 3 “Styles” for more information.

- **Headers and Footers:** These are custom unformatted fields.
- **Top or Bottom Navigation:** Change font face 2, font size 1; add your company logo.
- **Wizard Output:** Change the table border width, table color 1, and font face 1.
- **Links to Active Web Page:** Change with font face 2 and font size 2.
- **Guest Book:** Change with font face 2 and font size 2.
- **Checkout Image:** Add your custom checkout image.
- **Login Link:** Display login link for member, non-member pricing. Change with font face 2 and font size 2.
- **Allow Customers to Check Orders:** If selected, a login link will be available for your customers to view past orders and resubmit orders. Change with font face 2 and font size 2.
- **Hide Checkout Image:** If selected, the checkout image will not be output for a particular page.
- **Hide All Pricing:** For items that may have frequently changing prices or for items on display only, activate this wizard option.
- **Hide Member Price from Non-Members:** Use this wizard option if you are running a member / non-member store and wish to hide special member pricing from your non-member shoppers.
- **Hide Basket:** If you want to remove the ability for someone to purchase an item, activate this wizard.

Most of the above items can be activated or deactivated with a check box selection from the Web Page Wizard page.

Wizards and options

Any web page created with the Web Page Editor can use one of the available wizards to automatically output links to other dynamic pages. Each web page and wizard can be easily modified by using the Wizard Options and Styles. Not all wizards are available with all stores. A list of wizards only available through the Web Page Editor is shown below with an example for each.

Important Wizard Tips:

- Auto Centering will only affect navigation, wizards, guest book, etc.
- AbleCommerce does not format your custom fields; you must apply your own centering, font sizes, font face, etc.
- After selecting a wizard, click Change to update the list of available wizard options.
- If you want to use only images for your category or group titles, set the font size to '0'.

Categories and groups - webwiz01.cfm:

Available to store sizes small, medium, and large.

This wizard displays the category titles with its respective group title links. When the link is clicked, the shopper will proceed to a group page with product listings. You may apply a Style to change the font face, add table color, or a table border width.

Multimedia	Memory
<u>Audio Cables</u>	<u>RAM 168 pin SDRAM</u>
<u>CD-ROM Drives</u>	<u>PC100</u>
<u>CD-ROM Kits</u>	<u>RAM 168 pin SDRAM</u>
<u>Communications</u>	<u>PC133</u>
<u>Miscellaneous</u>	
<u>Sound Boards</u>	
<u>Speakers</u>	Monitors
<u>Video Cards</u>	<u>15 inch</u>
	<u>17 inch</u>
Networking	<u>19 inch</u>
<u>Adapter Cards</u>	
<u>Cables</u>	
<u>Miscellaneous</u>	

FIGURE 11. Categories and Groups Wizard Example

Within the Wizard Editor, you may customize the font sizes of your category and group titles, set the number of columns, and apply a Style. You also have the wizard options available to activate Headers and Footers, home navigation, guest book, and centering of the table data. This particular wizard enables you to display the number of products in a group and hide your images for a text only display.

Link to directory - webwiz02.cfm:

Available only to store size medium.

This wizard displays a simple hypertext link to the default directory page created with the Web Page Editor. A directory page must be created for this wizard to work.



FIGURE 12. Link to Directory Wizard Example

Within the Wizard Editor, you may customize your directory link title, font size, and apply a Style. This wizard has the standard wizard options available to activate Headers and Footers, home navigation, and guest book. You will not have the ability to select this wizard if you are editing the actual directory page because it won't link to itself.

Category links - webwiz03.cfm:

Available only to store size large.

This wizard displays your category titles with links to navigable category pages. A large store is the only one that uses category pages. A category page generates links to group pages and can be customized with the Category Wizard Editor.



FIGURE 13. Category Links Wizard Example

Within the Wizard Editor, you may customize the font size of your category titles, set the number of columns, and apply a Style. You also have the wizard options available to activate Headers and Footers, home navigation, guest book, and centering of the table data.

The text link can easily be replaced with an image by setting the font size to '0'. Make sure an image is assigned to each category.

Groups and products - webwiz04.cfm:

Available to store sizes small and medium. This is available to large also, although it is not recommended.

This wizard displays the group title and product title with a link to the product detail page.

Store Directory

Accessories

The Groups in this Category demonstrate different options for purchasing.

Miscellaneous
Storage Media
Switch Boxes
Tape Drives

Computer Systems

Demonstration of multiple levels of options with a Build-Your-Own Computer System

Build-Your-Own

Software

Using wizards you are able to limit the number of items per page, as demonstrated here.

Developer's Tools

Cases & Power Supplies
Available in FCC Systems

Miscellaneous
Power Supplies

Controller Cards

Add-Ons
ATIO/IDE
SCSI

Drives

Accessories
Floppy Drives
IDE
SCSI

Input Devices

Digitizing Tablets
Joystick/Flight Yoke
Keyboards
Mice/Pointing Device
Scanners

Modems

Connectware
Maxtech
Supra
US Robotics

Motherboards & Processors

Pentium Processors
Pentium Pro Processors
Pentium Processors II
Cyrix Processors
AMD Processors

Multimedia

Audio Cables
CD-ROM Drives
CD-ROM Kits
Communications
Miscellaneous
Sound Boards
Speakers
Television Cards

Networking

Adapter Cards
Adapter Cards, Genius
Adapter Cards, Maxtech
Adapters & Hubs, Comex
Cables
Miscellaneous

Notebook Computers

Accessories
Hyperdata
Maxtech
Twinhead

Printing and Faxing

Electronic Labeling
Fax Machines
Parts & Ribbons
Printers

Surge Suppressors

APC
Tripp Lite

Cables

Adapters
Centronics
Drives
Extensions
Printer Parallel
Serial

FIGURE 14. Groups and Products Wizard Example

Within the Wizard Editor, you may customize the font sizes of your group and product titles, set the number of columns, and apply a Style. You also have the wizard options available to activate Headers and Footers, home navigation, guest book, and centering of the table data. This particular wizard enables you to hide your images for the group or product, or hide the product descriptions as shown in the above example.

Search page - webwiz07.cfm:

Available to store sizes small, medium, and large.

This wizard is a standard search form. It will search through your store's entire inventory of active products and return the search results.



The image shows a web form for searching products. It includes a text input field for "Keyword(s) to search for:", a radio button selection for "Join keyword together with: And" (selected) or "Or", a dropdown menu for "Find items updated within:" set to "30 Days", a dropdown menu for "How Many?" set to "15", and two text input fields for "Define price (optional):" labeled "Lowest \$" and "Highest \$". A "Search!" button is located at the bottom right of the form.

FIGURE 15. Search Page Wizard Example

Within the Wizard Editor, you may customize the font sizes and apply a Style. You also have the standard wizard options available to activate Headers, Footers, Home Navigation, and Guest Book.

In order to have a Search page, you must have a Search Results page; this needs to be created first. After you have a Search Results page, you must attach this to the actual Search page through the Wizard Editor. You can only preview your search results page by clicking on the Search button.

Search results page - webwiz08.cfm:

Available to store sizes small, medium, and large.

This wizard displays your search results if you are using the Search Page wizard. Your active products will display with a link to your product detail page. You need to create a Search Results page before creating the actual search page. Attach the search results page to your search form and preview your search results through the search form as described above.

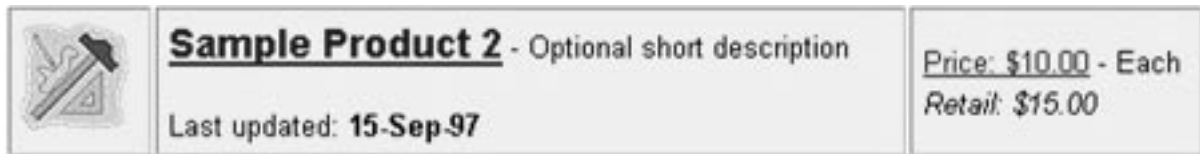


FIGURE 16. Search Results Page Wizard Example

Within the Wizard Editor, you may customize the font sizes and apply a Style. You also have the standard wizard options available to activate Headers and Footers, home navigation, and guest book. Additionally, you may hide your product pricing from non-members in a member / non-member store scenario. Or you may hide the product pricing all together.

In order to have a Search page, you must have a Search Results page; this needs to be created first. After you have a Search Results page, you must attach this to the actual Search page through the Wizard Editor. You can only preview your search results page by clicking on the Search button.

What's new - webwiz09.cfm:

Available to store sizes small, medium, and large.

This wizard displays the last thirty product additions or modified products. The shopper can select the number of new products to view at a time. The output is identical to the search results page as shown in Figure 16.

You can customize the font sizes and apply a Style. The standard wizard options are available to activate Headers and Footers, home navigation, and guest book. Additionally, you may hide your product pricing from non-members in a member / non-member store scenario. Or you may hide the product pricing all together.

Product specials - webwiz10.cfm:

Available to store sizes small, medium, and large.

This wizard displays your products on special. The output is identical to the Search Results page as shown in Figure 16 except that it also includes the period of time the product is on special.

You can customize the font sizes and apply a Style. The standard wizard options are available to activate Headers and Footers, home navigation, and guest book. Additionally, you may hide your product pricing from non-members in a member / non-member store scenario. Or you may hide the product pricing all together.

Inventory

This chapter is an introduction to your store's inventory structure. It covers helpful tips on using AbleCommerce with other utilities, a checklist for getting started, and pre-inventory procedures.

Inventory structure

AbleCommerce uses a hierarchical structure to establish inventory. The three levels to the inventory structure are Category, Group, and Product. A product may have an additional page of More Detail, which toggles back and forth with the Standard Detail page. Fifteen levels of your custom options can be attached to any product. The inventory relationship is illustrated in figure 17.

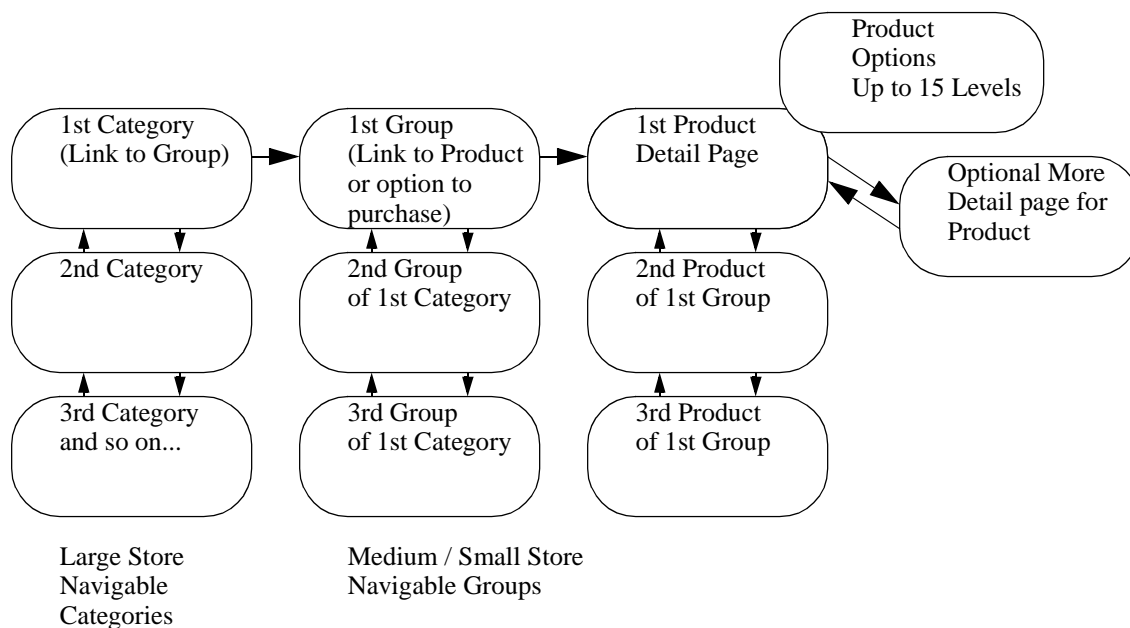


FIGURE 17. Inventory Structure Diagram

Navigable category pages are only available with a large store; they display your group information. The category page has up to two levels of interior navigation; browse from category to category or from page to page within a category. This feature enables you to set limits on the number of groups being displayed on any one category page and allows your customers to browse through many pages within a single category. These pages are customized within the Category Editing page using a Wizard.

All sizes of stores may have navigable group pages; they display and/or link to your product information. A group page becomes navigable as soon as there is more than one active in the same category and provided that you have turned on the navigation through Group Wizard Editing. Like navigating category pages, you may limit the number of products listed on any group page. This will automatically add the second level of page to page navigation in your main navigation bar.

The group pages can display a product's title, short description, small image, options, and the Add to Basket button. However, if you have more than 250 characters of descriptive text for your product, you will need to use the standard product detail page. The standard product detail page can display your product image, up to 64,000 characters of your custom HTML, product options, and the Add to Basket button. Customize your product page with Wizards and Options from within the Product Editing page.

If you need to use a third product image or have more descriptive custom HTML, the More Detail area from within the product editing area can be used. This will automatically toggle a link from each of the product pages and the Add to Basket button and product options will be available on both.

Store size is largely dependent on the number of categories you plan on using. A medium store can effectively use the dynamic directory page to show about 20 category titles and 20 group title links for each category. If you need to use more categories and/or groups, you may want to use a large store. A small store may have just one category to hold the hierarchical inventory structure together and use the group pages for navigating product inventory.

If you think you should be using a large store and the Wizard Editor is not available from the Category Editing page, you will need to contact your system administrator.

Before getting started

By now, you should have a good idea of your store size based on the number of products you plan on having in your inventory. Before you begin, there are some basic things you should have completed prior to adding inventory. We also list the information fields available for each inventory area. Use the following list to make your store building go as smooth and easy as possible.

- Company contact information completed for customer invoices and order notifications.
- Shipping class established and setup with custom shipping methods and rates.
- Tax rates established and applied to appropriate states, provinces, countries, or postal codes.
- Customize your default company Style with page colors, fonts, table colors, and navigational images.
- Establish any custom discount methods.
- Categorize products into logical groups and again into categories if needed.
- Category titles, descriptions, and images (optional).
- Group titles, descriptions, and images (optional).
- Product image for detail page, small product image for group page, short and standard descriptions, SKU, weight, unit, and options (optional). Product title and price are required.
- Products on special need a special price and description.

When you begin creating categories, groups, or products, keep in mind there is a copy feature. We suggest customizing your first category, group, and product page as a template that can be copied and renamed. This will save you time if you plan on having similar pages. You can always use wizards and options to update entire categories, groups, or all products at the same time.

Frequently asked questions

What store size should I be using? This is dependent on the total number of products you are planning to have in inventory. If you want to have a few dozen products, you'll probably want a small store. If you have a few hundred products and a dozen or so categories, you may want a medium store. If you have many categories and groups, you should go with a large store.

What is the difference between a small, medium, and large size store? A small store uses a wizard on the dynamic home page to output links to your inventory pages. A medium store uses the dynamic directory page to output inventory links. A large store uses many categories with many groups; these are output on navigable category pages.

Can I start small and expand my store? Yes, start with any size store. You will have to contact your system administrator to change your store size.

Can I change shipping class after I've begun? Yes, but if the shipping class is changed, you will need to revise your custom shipping methods. If you change to a shipping class that's based on weight, you will need to enter a product weight into the Product Editing page or into the Option weight field.

Can I have a product under two different groups? This can easily be accomplished by making a copy of the product then using the move feature for one of the two products. They must be maintained separately.

Why doesn't my new category or group appear? Check to see if there is at least one group and attached product; both activated for viewing.

Can I make changes to my live pages? Yes, the preview feature enables you to completely modify your live pages. When you are ready to make the changes permanent, click the Finish button. You can also setup groups of products in advance such as seasonal items, by leaving the group inactive until you are ready to go live.

Can I modify my products all at once? Yes, using Product Quick Edit, you can use search criteria and select your individual product fields for editing. All items display on the same page for a single button update to edit stock quantities, prices, names, descriptions, etc.

Can I apply discounts to all my products at once? Yes, add your custom discount method(s) under Discounts from the Merchant Menu. Go to the category editing page and attach the discount to the category; this will apply it to all groups and products under that category.

Can I have different background and page colors on every page? Yes, using the new Style feature, you can create your own page themes using custom text colors, table colors, fonts, background images, navigational images, and headers and footers.

Can I change the look of my pages on a daily basis? Yes, create a new Style for every day of the week and use the Product Wizard Editor to assign a different Style to every product in your store with one easy step each day.

Inventory - Categories

This chapter describes the process of designing your navigable category pages used in large stores.

Add or delete categories

The Category page enables you to create unlimited categories but if you have a small store, you will probably only need to use one. If your store was created from the basic store template, you may have two categories already established. These are for your convenience only; you can modify them or add your own.

If you are setting up a large store, you will want to have your category and group titles organized. We highly recommend creating one perfect category page as a template and then make copies.

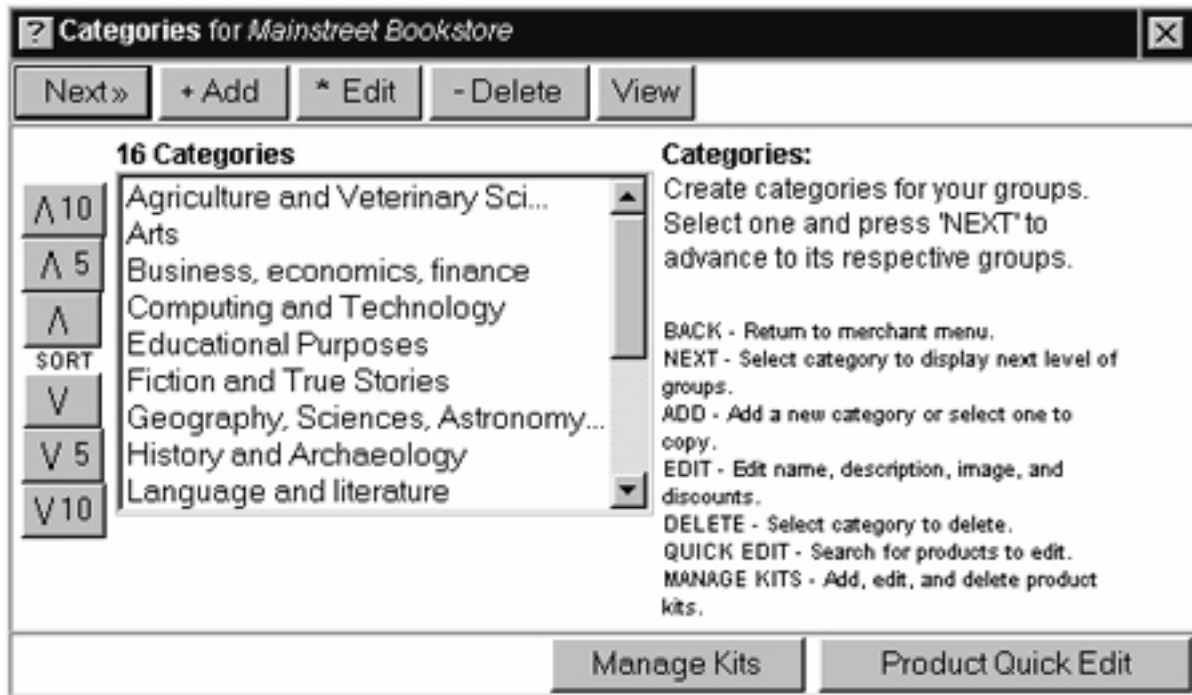


FIGURE 18. Category Example

To add a category:

1. From the Merchant Menu, click the Inventory image to display the Categories for your store.
2. To make a copy, select an existing category title and click the Add button.
3. To create a new category, click the Add button without selecting an existing category.
4. A new category is added with a title of 'New Category'. This new category will not appear on the retail side until you have attached one active group and one active product.

To delete a category:

1. From the Merchant Menu, click the Inventory link to display the Categories for your store.
2. Select an existing category and click the Delete button.
3. A confirmation page will follow, click Yes to permanently delete the category with attached groups and products. Images are not deleted.

Editing categories

When you add a category, you will be able to change its font size, positioning, image parameters, and page Style.

The only requirement for a category is its title. If you decide to add a description, you may want to format this field with your own custom HTML. For maximum flexibility, Style properties and Wizard options do not apply to your custom fields. You may also decide to use a category image, this can be used in addition to the category title text or as a replacement.

Editing Category (Arts)

Title: [Required] Maximum 150 characters.

Description: Maximum 200 characters. [HTML]

Image:

Image Properties:

Image Directory Name: / [Optional]

Use this field to specify a sub-directory for images in this category and its respective groups and products.

FIGURE 19. Editing Category Example

To edit a category:

1. From the Merchant Menu, click the Inventory image.
2. Select an existing category and click the Edit button for the Editing Category page.

3. Enter a new category title into the field.
4. Enter your custom HTML into the description field. Maximum of 200 characters.
5. If you are going to use an image for this category, see the next set of instructions for adding or modifying a category image.
6. If you are maintaining large amounts of images, you may want to create separate directories for each of your categories and its respective group and product images. You can do this by entering a sub-directory name into the Image Directory Name field.
7. Only a large store will have access to the Wizard button from this page. If you do not see the Wizard button on this page, you will be formatting your category information from the Web Page Wizard. A large store uses the Category Wizard Editor to design navigable category pages. See “Wizards and options” later in this chapter.
8. Click Preview anytime to see how your page will appear. All of your changes are being updated in a temporary location until you decide to finish.
9. Click Finish to make all changes permanent.

To add or modify the category image:

1. From the Editing Category page, click the Modify button next to the Image field.
2. The Image Properties page will show the file name of any current image selection with the ability to change image width, height, spacing, border, and alternate text.
3. Click the Image Picker button to add or change the current image.
4. From the left frame, click an existing image file name link from the list to view the same image in the right frame. The image is shown in actual size with its width and height information.
5. After you have selected the image to use, click the Use This Image button to return to the Image Properties page.
6. Select your image properties: alignment, horizontal spacing, vertical spacing, border, and alternate text. Most browsers will display your alternate text on mouse over.
7. Click Update to return to the previous page and view the image source code generated from your selections.
8. When finished, click Finish to make Category modifications permanent.

To apply a discount:

1. From the Editing Category page, click the Discount button.
2. Check the box to attach one or more of your custom discounts to an entire category of groups and products.
3. You can override a category discount by attaching a discount to an individual group or product.

Category page layout

A navigable category page can be customized by using the Wizard button from the Editing Category page. If you do not have this button, you are not setting up a large store; instead, use the Wizard button from the Web Page Editor.

A category page can be a combination of your custom HTML and automatically output information. The Category Wizard Editor enables you to activate options for Centering, Headers, Footers, and Navigation. A sample navigable category page layout is shown in figure 20.

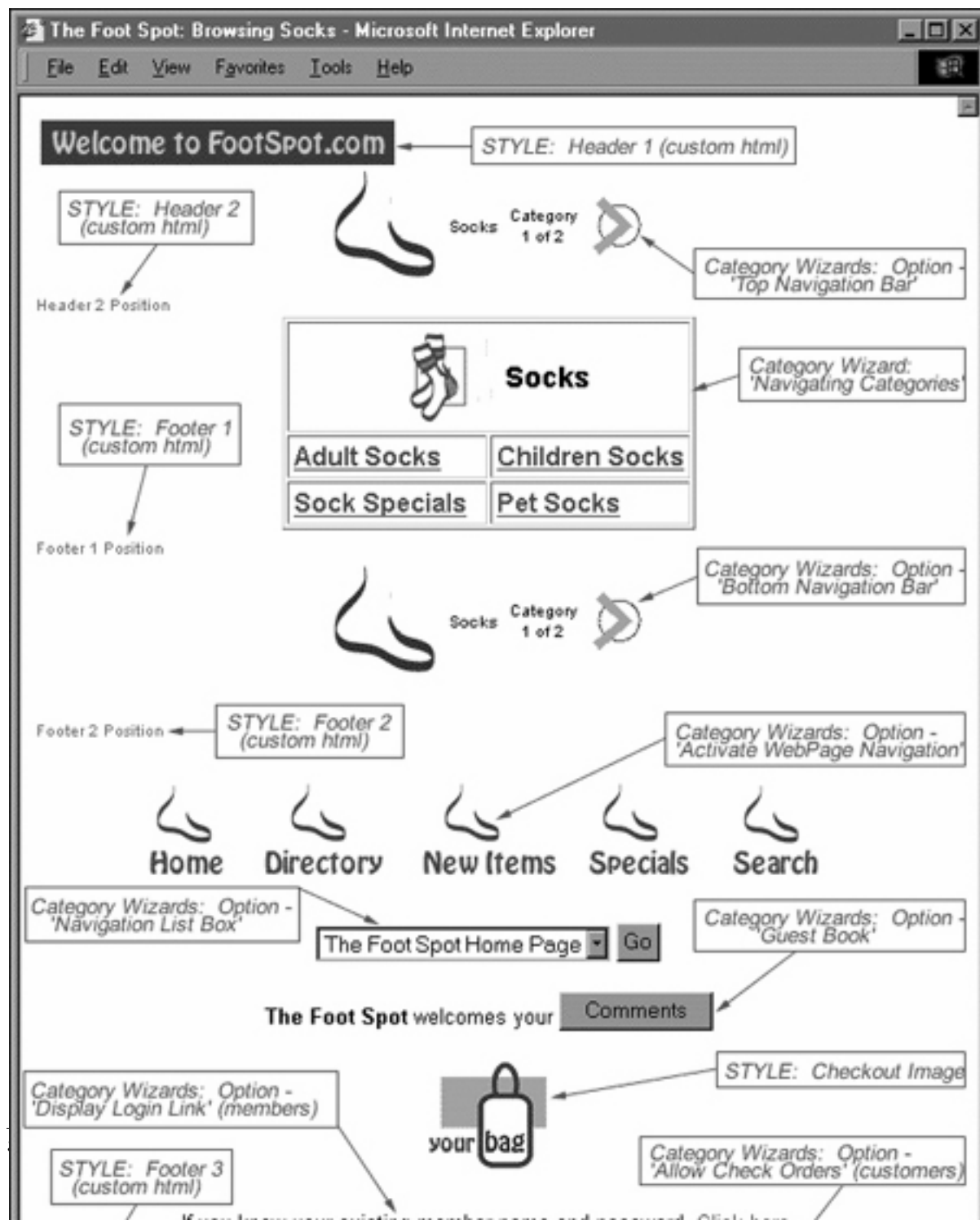


FIGURE 20. Category Page Layout (Large Store Only)

The Style attached to your category can be customized to change the following page properties. See Chapter 3 “Styles” for more information.

- **Headers and Footers:** These are custom unformatted fields.
- **Navigation Bar:** Change the table border width, table color 3, font face 2, font size 2; add your company logo, custom forward and back arrows, and optional page to page navigational arrows.
- **Wizard Output:** Change the table border width, table color 1, table color 2, and font face 1.
- **Links to Active Web Page:** Change with font face 2 and font size 2.
- **Navigation List Box with your Category Titles:** Change with font face 2 and font size 1. (Not all browsers support this feature.)
- **Guest Book:** Change with font face 2 and font size 2.
- **Checkout Image:** Add your custom checkout image.
- **Login Link:** Display login link for member, non-member pricing. Change with font face 2 and font size 2.
- **Allow Customers to Check Orders:** If selected, a login link will be available for your customers to view past orders and resubmit orders. Change with font face 2 and font size 2.
- **Hide Checkout Image:** If selected, the checkout image will not be output for a particular page.
- **Hide All Pricing:** For items that may have frequently changing prices or for items on display only, activate this wizard option.
- **Hide Member Price from Non-Members:** Use this wizard option if you are running a member / non-member store and wish to hide special member pricing from your non-member shoppers.
- **Hide Basket:** If you want to remove the ability for someone to purchase an item, activate this wizard.

Most of the above items can be activated or deactivated with a check box selection from the Category Wizard page. The checkout image and wizard are always output on the category page.

Wizard settings and options

Navigable categories - catwiz01.cfm:

Only available to a large store.

This wizard displays the category page with its respective group links. Multiple categories will navigate with back and forward arrows. Limit the number of groups displayed on a category page for a second level of page to page navigation.

You can update wizard settings for the current category page or for every category page in your store. If you use a multiple page update, you will not be allowed to preview or undo your changes. Update one category at a time, click Preview to see your changes and when you are satisfied with the results, update wizard settings and options for all categories.

Category Wizard (Computing and Technology)

Wizard: *** Navigating Categories** **Change**

This wizard displays a category page with its respective group links. Multiple categories will navigate with back and forward arrows. Options available: group title font size, number of columns, images for category and/or group, centering. This wizard can only be used on a large size store. The next pages display each separate group with its respective products.

☒ Update wizard and options for **this category only**.

☐ Update wizard and options for **ALL categories**. No Preview! Changes will be permanent.

Display **6** group titles per page.

Display **wizard output** in **2** Column(s)

Show **category title** in a font size of **3** Enter '0' to hide title and show an image only.

Show **group title** in a font size of **2** Enter '0' to hide title and show an image only.

Select Style: **Category**

Wizard Options **Click Preview to see changes, when done go Back to Finish.**

FIGURE 21. Category Wizard

The Category Wizard settings affect only the information being displayed from the wizard.

- **Display a set number of group listings per page:** Secondary page to page navigation will appear.
- **Set the number of columns:** Minimum 1 - maximum 10.
- **Set the font size of your category and group title:** Enter '0' to hide title and show image.

- **Select your default store Style or attach a new one:** Change wizard table properties and font face.

These are the Wizard Options available to the Navigable Categories wizard, check the box next to each option to activate.

- **Auto-Centering:** Centers only automatic output information, this does not include your custom fields. If needed, apply HTML tags to `<center>` your custom text `</center>`.
- **Header 1, Header 2, Footer 1, Footer 2, and Footer 3:** Your custom text added in Styles.
- **Top and Bottom Navigation Bar:** Automatically generated, customize in Styles.
- **Web Page Navigation Links:** For your dynamic web pages that are active for viewing.
- **Navigation List Box:** Additional navigation to all categories in a select box.
- **Guest Book:** Standard guest book, customize in the Comment area.
- **Hide Checkout Image:** If selected, the checkout image will not be output for a particular page.
- **Center Title and Table Data 1 Centered:** Center the category information and/or the group information. Customize table colors in Styles.
- **Hide Category or Group Images:** Removes image from view. Deselect this option to show the image.
- **Allow Customers to Check Orders:** If selected, a login link will be available for your customers to view past orders and resubmit orders.
- **Hide All Pricing:** For items that have frequently changing prices or for items on display only, activate this wizard option.
- **Hide Member Price from Non-Members:** Use this wizard option if you are running a member / non-member store and wish to hide special member prices from the non-member shoppers.
- **Hide Basket:** If you want to remove the ability for someone to purchase an item, activate this wizard.

Unless you are doing a multiple page update, you will need to click the Back button, return to Category Editing and click Finish to make your changes permanent.

Product quick edit

A powerful feature for stores updating large quantities of products is the Product Quick Edit menu. By selecting a Category or Group and Product fields, you can create an editable product report. You can also use a keyword to search in a particular product field. With Inventory Management enabled, you can easily update your stock quantities and reorder levels.

Product Quick Edit for new store

Filter your product listing by selecting a Category or Group with or without a keyword. Select one or more fields to edit.

Categories:

Quick Stores

Groups:

Quick Stores

Select Field(s) to Edit:

SKU
Product Title
Price
Retail
Unit
In Stock
Reorder Level
Active
Weight
Taxable

☒ Filter products by [] in [Product Title]

☐ Show items that are **out of stock**.

☐ Show items that are **less than or equal to** the specified **reorder level**.

☐ Show items that are within [0] (Low) and [1000] (High) **stock on hand**.

Reset Edit Products

FIGURE 22. Product Quick Edit

To create a product report:

1. From the Merchant Menu, click Product Quick Edit.
2. Select a Category or Group to filter products or leave none selected for all products.
3. Select all the product fields you will be editing by holding down the Shift or Control keys.
4. If you want to find only products matching a keyword then type in the keyword and select the field that the keyword is contained in.
5. For Inventory Management, you can select other options for an out of stock report, low quantity stock report, or a range of stock quantities.

6. For a report of all products, click the Reset button and remove 'Keyword' from the search field. This could easily shut a server down if there are large quantities of products in this store.
7. After making your selections, click the Edit Products button.

Use the Next and Previous Results buttons to navigate if you have many products. Remember, if you edit information, clicking Update Products will only update products on the page you are viewing.

Product Quick Edit for Mainstreet Bookstore
✕

SKU	Product Title	Price	Retail	Unit
	100 Tips for Manager	45.00	62.00	Each
	Advancement of Veter	5.99	0.00	
	Agriculture, Fisheri	14.99	18.95	each
	Behaviour of the Dom	5.99	0.00	
	Biotechnology, Agric	5.99	8.99	each
	Cherries: Crop Physi	5.99	0.00	
	Coffee, Cocoa and Te	5.99	0.00	
	Creating and Managin	15.99	19.99	each
	Digest of Agricultur	45.50	59.99	each
	Diversion and Entrap	25.99	0.00	each
	Ecological Effects o	5.99	12.00	each
	Farm Animals and the	105.99	0.00	
	Farm-made Aquafeeds	55.99	0.00	each
	Fish and Fishery Pro	5.99	0.00	each
	Fish Diseases and Di	105.99	0.00	each

Next Results

Clicking on the Update button will only update the records on this page.

Reset
Update Products

FIGURE 23. Product Quick Edit Report

A report showing each product title and the fields you selected is shown. Make your changes and click the Update Products button to complete.

Inventory - Groups

This chapter describes the process of designing your Group page using Styles and Wizards.

Add, delete, or move groups

The Group page enables you to create unlimited groups for the previous category. If your store was created from the basic store template, you may have groups already established. These are for your convenience only; you can modify them or add your own.

If you are setting up a new store, you will want to have your Group information organized. We highly recommend creating one perfect Group page as a template and making copies.

If a discount was applied at the category level, it will now appear at the bottom of the Group page. If a discount appears, it applies to all Groups unless another discount is attached at the Group level. A Group discount will over-ride a Category discount. For example, the following figure shows a discount that was applied at the category level. This discount applies to Example Group Title 1, 3, and 4. Since Example Group Title 2 has its own discount attached, it is not affected by the previous category discount.

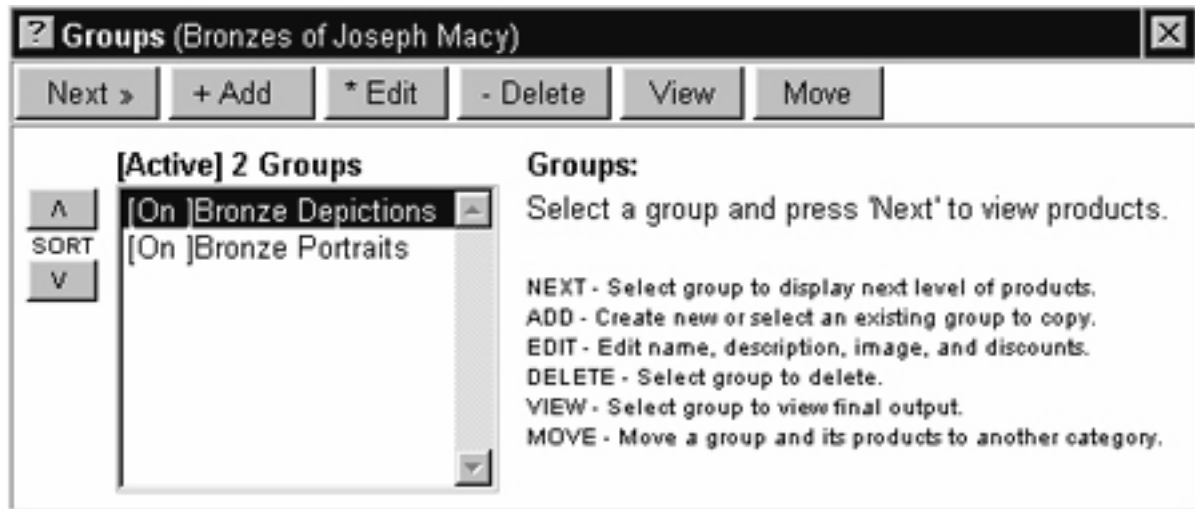


FIGURE 24. Groups Example

To add a group:

1. From the Merchant Menu, click the Inventory image to display the Categories for your store.
2. Select a Category and click the Next button.
3. To make a copy, select an existing Group title and click the Add button.
4. To create a new Group, click the Add button without selecting an existing Group.
5. A new Group is added with a title of 'New Group', and set to inactive. This new Group will not appear until you have activated it and attached one active product.

To delete a group:

1. From the Merchant Menu, click the Inventory image to display the Categories for your store.
2. Select a Category and click the Next button.
3. Select an existing Group and click the Delete button.
4. A confirmation page will follow, click Yes to permanently delete the Group with attached products.

To move a group:

1. From the Merchant Menu click the Inventory image to display the Categories for your store.

2. Select a Category and click the Next button.
3. Select an existing Group and click the Move button.
4. From the available list, select an existing Category to move this Group and its products to.
5. Click Finish to move the Group, Products, and copy images.

Editing groups

When you add a Group you will be able to change its font size, positioning, image parameters, and page Style.

The only requirement for a Group is its title. If you decide to add a description, you may want to format this field with your own custom HTML. For maximum flexibility, Style properties and Wizard options do not apply to your custom fields. You may also decide to use a Group image, this can be used in addition to the Group title text or as a replacement.

Editing Group (Bronze Depictions)

Title: [Required] Maximum 150 characters.
Bronze Depictions

Active: ☒ This Group and its' active products are viewable by shoppers.

Description: Maximum 255 characters.
HTML image references can be used here to display images and tables on the group page.

Capture a moment in time...

Use WYSWYG Editor

Image: This image is used in links that point to this group and is NOT shown on the group page.
depictions.gif Modify..

Image Properties: WIDTH="144" HEIGHT="43" HSPACE="0" VSPACE="0"

Discount Wizard Preview Finish

FIGURE 25. Editing Group Example

To edit a group:

1. From the Merchant Menu, click the Inventory image to display the Categories for your store.
2. Select a Category and click the Next button.
3. Select an existing Group and click the Edit button for the Editing Group page.
4. Enter a new Group title into the field.
5. Enter your custom HTML into the description field. Maximum of 255 characters.
6. If you are going to use an image for this group, see the next set of instructions for adding or modifying a group image.
7. To apply Styles and change wizard settings, click the Wizard button from this page.
8. Click Preview anytime to see how your page will appear. All of your changes are being updated in a temporary location until you decide to finish.
9. Click Finish to make all changes permanent.

To add or modify the group image:

1. From the Editing Group page, click the Modify button next to the Image field.
2. The Image Properties page will show the file name of any current image selection with the ability to change image width, height, spacing, border, and alternate text.
3. Click the Image Picker button to add or change the current image.
4. From the left frame, click an existing image file name link from the list to view the same image in the right frame. The image is shown in actual size with its width and height information.
5. After you have selected the image to use, click the Use This Image button to return to the Image Properties page.
6. Select your image properties: alignment, horizontal spacing, vertical spacing, border, and alternate text. Newer browsers will display your alternate text on mouse over.
7. Click Update to return to the previous page and view the image source code generated from your selections.
8. When complete, click Finish to make Group modifications permanent.

To apply a discount:

1. From the Editing Group page, click the Discount button.
2. Check the box to attach one of your custom discounts to an entire Group and all attached products.
3. You can over-ride a Category discount by attaching a discount to an individual group or product.

To remove a discount applied at the category level:

1. From the Merchant Menu, click the Discounts image.
2. Add a new discount method but don't actually apply any discount values.
3. From the Merchant Menu, click the Inventory image to display the Categories for your store.
4. Select the discounted Category and click the Next button.
5. Select the group you want to remove the discount from then click Edit.
6. From the Editing Group page, click the Discount button.
7. Check the box to attach the custom discount method you just created.

Group page layout

A navigable Group page can be customized by using the Wizard button from the Editing Group page. There are two wizards available at the Group level. The Group Standard wizard displays your product listings in a table of rows. The Group Column wizard displays your products in columns and the product options will be shown if they are available.

The Group wizards can be setup to link to the next product detail page or you can add the option to purchase from this page. The Group Wizard Editor allows you to activate options for Centering, Headers, Footers, and Navigation. An example Group page layout is shown below.

The Foot Spot: Browsing Adult Socks - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Welcome to FootSpot.com

STYLE: Header 1 (custom html)

Group Wizards: Option - 'Top Navigation Bar'

STYLE: Header 2 (custom html)

The Foot Spot Directory Sub-Category 1 of 2

Group Wizard Selection: 'Group Columns w/ options'

Header 2 Position

Red Socks ID #: 1002A-RED Price: \$5.99 a pair Sugg. Retail: \$6.99

Blue Socks ID #: 1002A-BLU Price: \$5.99 a pair Sugg. Retail: \$6.99

Green Socks ID #: 1002A-GRN Price: \$5.99 a pair Sugg. Retail: \$6.99

Orange Socks ID #: 1002A-ORG Special: \$2.99 Sugg. Retail: \$6.99

Yellow Socks ID #: 1002A-YLW Price: \$5.99 a pair Sugg. Retail: \$6.99

Black Socks ID #: 1002A-BLK Price: \$5.99 a pair Sugg. Retail: \$6.99

Footer 1 Position

STYLE: Footer 1 (custom html)

The Foot Spot Directory Sub-Category 1 of 2

Group Wizards: Option - 'Bottom Navigation Bar'

Footer 2 Position

STYLE: Footer 2 (custom html)

Group Wizards: Option - 'Activate WebPage Navigation'

Home Directory New Items Specials Search

Group Wizards: Option - 'Navigation List Box'

The Foot Spot Home Page Go

Group Wizards: Option - 'Guest Book'

The Foot Spot welcomes your Comments

Group Wizards: Options - 'Display Login Link' (members)

STYLE: Checkout Image

Group Wizards: Option - 'Allow Check Orders' (customers)

STYLE: Footer 3 (custom html)

If you know your existing member name and password, [Click here](#).

If you would like to review or re-submit previous orders, [Click here](#).

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FIGURE 26. Group Page Layout

The Style attached to your Group can be customized to change the following page properties. See Chapter 3 “Styles” for more information.

- **Headers and Footers:** These are custom unformatted fields.
- **Navigation Bar:** Change the table border width, table color 3, font face 2, font size 2; add your company logo, custom forward and back arrows, and optional page to page navigational arrows.
- **Wizard Output:** Change the table border width, table color 1, table color 2, and font face 1.
- **Links to Active Web Page:** Change with font face 2 and font size 2.
- **Navigation List Box with your Group Titles:** Change with font face 2 and font size 1. (Not all browsers support this feature)
- **Guest Book:** Change with font face 2 and font size 2.
- **Hide Checkout Image:** If selected, the checkout image will not be output for a particular page.
- **Login Link:** Display login link for member, non-member pricing. Change with font face 2 and font size 2.
- **Allow Customers to Check Orders:** If selected, a login link will be available for your customer to view past orders and resubmit orders. Change with font face 2 and font size 2.
- **Hide all Pricing:** For items that have frequently changing pricing or for items on display only, activate this wizard option.
- **Hide Member Price from Non-Members:** Use this wizard option if you are running a member / non-member store and wish to hide your special member prices from your non-member shoppers.
- **Hide Basket:** If you want to remove the ability for someone to purchase an item, activate this wizard.

Most of the above items can be activated or deactivated with a check box selection from the Group Wizard page. The checkout image and wizard are always output on the Group page.

Wizard settings and options

You can update wizard settings for the current group page, all groups in a category, or every group page in your store. If you use a multiple page update, you will not be allowed to preview or undo your changes. Update one Group at a time; click Preview to see your changes and when you are satisfied with the results, update wizard settings and options for all groups.

Group standard wizard - grpwiz01.cfm:

Available to all stores.

This wizard displays the group page with its product information in a table of rows. Limit the number of products per page for a second level of page to page navigation. This is the only group wizard that has an option to add multiple products to the basket at one time.

Group columns with options wizard - grpwiz02.cfm:

Available to all stores.

This wizard displays the group page with its product information in a table of columns. Limit the number of products displayed on a group page for a second level of page to page navigation.

Group Wizard (Bronze Depictions) [X]

Wizard: * Group Standard [v] [Change]

This wizard displays the group page with its respective product information in a table row. Options available: product title font size, image alignment, number of products per page, option to buy single items, option to buy multiple items, hide link to product detail page, navigation to more products of same group, and centering. This wizard can be used with a small, medium and large size store. The next pages (optional) display product details with option to buy.

☒ Update wizard for **this group only**.

☐ Update wizard for all **groups** in this category. No Preview! Changes will be permanent.

☐ Update wizard for **ALL groups** in ALL categories. No Preview! Changes will be permanent.

Display [2] product titles per page.

Show **Product title** in a font size of [4] Enter '0' to hide title and show an image only.

Show **Product price(s)** in a font size of [2] Does not affect the product short description field.

Select Style: [Default] [v]

FIGURE 27. Group Wizard

The Group Wizard settings only affect the information being displayed from the wizard.

- **Display a set number of product listings per page:** Secondary page to page navigation will appear.
- **Set the number of columns:** Minimum 1 - maximum 10. Not available to Group Standard.
- **Set the font size of your product title and product information:** Enter '0' to hide title and show image.
- **Select your default store Style or attach a new one:** Changes wizard table properties and font face.

These are the Wizard Options available to the group wizards, check the box next to each option to activate.

- **Multiple-currency:** Displays the original price before conversion and the converted amount.
- **Auto-Centering:** Centers only automatic output information, this does not include your custom fields. If needed, apply HTML tags to <center> your custom text </center>.
- **Header 1, Header 2, Footer 1, Footer 2, and Footer 3:** Your custom text added in Styles.
- **Top and Bottom Navigation Bar:** Automatically generated, customize in Styles.
- **Web Page Navigation Links:** For your dynamic web pages that are active for viewing.
- **Navigation List Box:** Additional navigation to all groups in a select box.
- **Guest Book:** Standard guest book, customize in the Comment area.
- **Table Data 1 Centered:** Center the product information. Customize table colors in Styles.
- **Hide Links to Product Detail:** Remove links to the product detail page.
- **Option to Buy:** Select to allow purchase from this page.
- **Allow Customers to Check Orders:** If selected a login link will be available for your customers to view past orders and resubmit orders. Change with font face 2 and font size 2.
- **Hide Checkout Image:** If selected, the checkout image will not be output for a particular page.
- **Hide All Pricing:** For items that may have frequently changing prices or for items on display only, activate this wizard option.
- **Hide Member Price from Non-Members:** Use this wizard option if you are running a member / non-member store and wish to hide special member pricing from your non-member shoppers.
- **Hide Basket:** If you want to remove the ability for someone to purchase an item, activate this wizard.

Unless you are doing a multiple page update, you will need to click the Back button, return to Group Editing and click Finish to make your changes permanent.

Inventory - Products

This chapter describes the process of adding products and designing your product detail page using Styles and Wizards.

Add, delete, or move products

The Product page allows you to create an unlimited number of products for the previous group. If your store was created from the basic store template, you may have products already established. These are for your convenience only; you can modify them or add your own.

If you are setting up a new store, you will want to have your product information organized. We highly recommend creating one perfect product page as a template and then making copies.

From the Products page, you will see all your products for the selected group. The product title is listed with the status of [On] for Active products or [Off] for inactive products. If inventory control is enabled, then the quantity in stock is shown in parenthesis. The products are displayed in the order they will display on the retail pages. Select a product and click the sort buttons to the left to move up or down by 1, 5, or 10 increments.

If a discount was applied at the group level, it will appear at the bottom of the Product page. If a discount appears, it applies to all Products unless another discount is attached to an individual product. A Product discount will over-ride a Group discount.

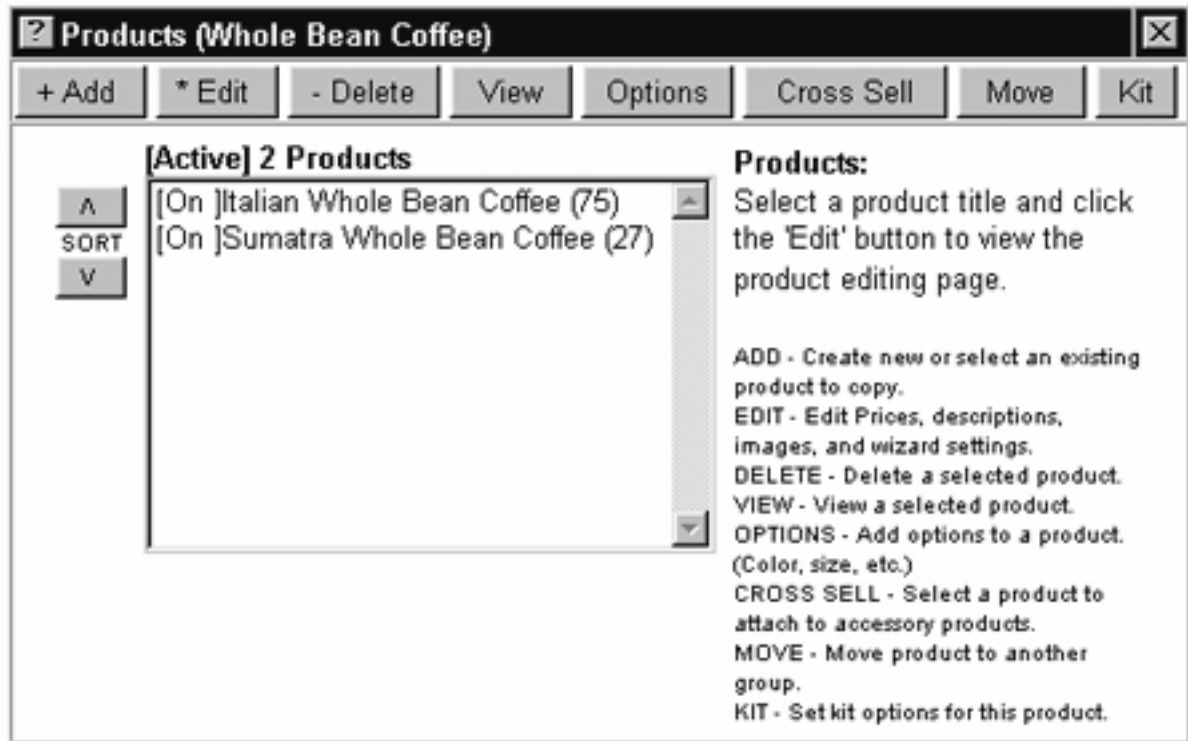


FIGURE 28. Products Example

To add a product:

1. From the Merchant Menu, click the Inventory image to display the categories for your store.
2. Select a category and click the Next button for the Group page.
3. Select a product and click the Next button for the Products page.
4. To make a copy, select an existing product title and click the Add button.
5. To create a new product, click the Add button without selecting an existing product.
6. A new product is added with a title of 'New Product' and set to inactive.

To delete a product:

1. Select an existing product from the Products page.

2. Click the Delete button.
3. A confirmation page will follow; click Yes to permanently delete the product.

To move a product:

1. Select an existing product and click the Move button.
2. From the available list, select an existing Group to move this product to.
3. Click Finish to move the product and copy images.

Editing products

When you add a product you will be able to change its font size, positioning, image parameters, wizard, and page Style. The only requirement for a product is its title. There are fields available for price, retail, descriptions, images, unit, weight, stock quantity, reorder level, SKU, and up to 6 custom fields. You may also add product discounts, product specials, and add up to 15 levels of product options.

Click the More Detail button to view all product fields. See figure 30.

A product may have up to three sets of images and descriptions. If you decide to add product descriptions, you may want to format the fields with your own custom HTML. For maximum flexibility, Style properties and Wizard options do not apply to your custom fields.

Editing Product (Sumatra Whole Bean Coffee)

Finish Preview Special Discount Options Wizard More Detail

Title: [Required] Maximum 100 characters.
Sumatra Whole Bean Coffee

Price: 25.00 Enter '0' to use priced options.

Retail: 30.00

Standard Image: sumatra.gif Modify..

Standard Image Properties: WIDTH="65" HEIGHT="75" BORDER="0"

Standard Description [HTML] Max. 64,000 chars. Used on this product detail page.

Enter a custom detailed product description here.
You can also use another page

Use WYSIWYG Editor

FIGURE 29. Editing Product (Less Detail)

To edit a product:

1. From the Merchant Menu, click the Inventory image to display the categories for your store.
2. Select a category and click the Next button for the Group page.
3. Select a group and click the Next button for the Products page.
4. Select an existing product and click the Edit button for the Editing Product page.
5. Enter a new product title into the field.
6. Enter a product price. Enter '0' if this product will be using priced options instead. If membership pricing has been activated, this field should contain a price for members only.
7. Enter a retail price. This is for display purposes only unless you are using member/non-member pricing levels. If membership pricing has been activated, this field should contain a higher price for non-members.
8. Enter your product's custom HTML into the Standard Description field and a Standard Image for display on the product detail page.

9. Click the More Detail button to display all available product fields. See figure 29, Editing Product (More Detail).
10. Enter a SKU or product identifier.
11. Enter a product unit description.
12. Enter a product weight if you are using a shipping class that's based on weight.
13. Enter the quantity In Stock for this product. Only available if Inventory Management is enabled.
14. Enter a minimum stock quantity for Reorder Level, the point at which you can be notified by email for re-ordering of product. Only available if Inventory Management is enabled.
15. Enter a file name without spaces or click the Select button to upload a file without spaces.
16. If you want to use Product Custom Fields, simply enter a Header no longer than 20 characters and enter some information in the second part, no longer than 80 characters.
17. Enter your custom HTML into the Short Description field and a Small Icon for display on the previous group page. Maximum of 255 characters.
18. Enter your custom HTML into the More Detail field and a Large Image if you plan to have a second page of product details. Anything entered into these fields will automatically trigger a More Detail link to a second product detail page.
19. If you are going to use images for this product, see the next set of instructions for adding or modifying a product image.
20. To apply Styles and change wizard settings, click the Wizard button from this page.
21. Click Preview anytime to see how your page will appear. All of your changes are being updated in a temporary location until you decide to finish.
22. Click Finish to make all changes permanent.

Editing Product (Sumatra Whole Bean Coffee)													
Finish		Preview		Special		Discount		Options		Wizard		Less Detail	
Title:		[Required] Maximum 100 characters. Sumatra Whole Bean Coffee						Activate for Viewing:		<input checked="" type="checkbox"/>			
								Check if product is taxable?		<input checked="" type="checkbox"/>			
Price:		25.00		Enter '0' to use priced options.						Retail:		30.00	
SKU:		5865656						Unit:		bag			
Weight:		10		(lb) Enter a weight if used to calculate shipping charges.									
In Stock:		27		Enter the quantity in stock.						Reorder Level:		20	

FIGURE 30. Editing Product (More Detail)

To add or modify the product image:

1. From the Editing Product page, click the Modify button next to any of the three Image fields.
2. The Image Properties page will show the file name of any current image selection with the ability to change image width, height, spacing, border, and alternate text.
3. Click the Image Picker button to add or change the current image.
4. From the left frame, click an existing image file name link from the list to view the same image in the right frame. The image is shown in actual size with its width and height information.
5. After you have selected the image to use, click the Use This Image button to return to the Image Properties page.
6. Select your image properties: alignment, horizontal spacing, vertical spacing, border, and alternate text. Newer browsers will display your alternate text on mouse over.
7. Click Update to return to the previous page and view the image source code generated from your selections.
8. When finished, click Finish to make Product modifications permanent.

To apply a discount:

1. From the Editing Product page click the Discount button.
2. Check the box to attach one or more of your custom discounts to a product. If you have already applied a discount at the Category or Group level, this will override any prior discounts.

Cross selling

The Product page allows you to select a product and search for other products that are related such as accessory items. You can automatically display a list of additional product links by simply attaching them to the selected product. This is called Cross Selling.

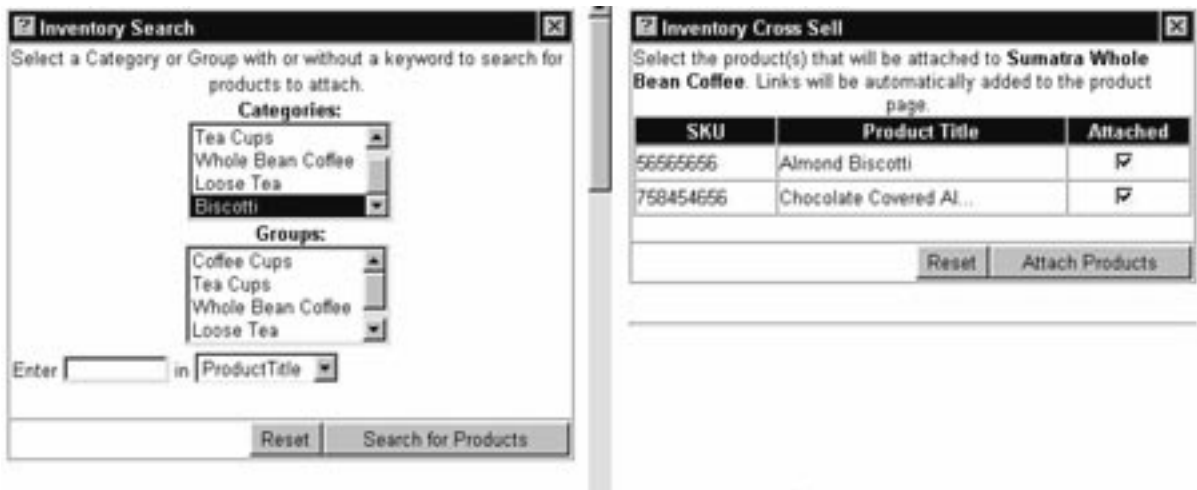


FIGURE 31. Inventory Search & Cross Sell

To attach products for cross selling:

1. From the Product page, select a product to attach items to and click the Cross Sell button. When you click Cross Sell, the left frame shown in figure 31 will appear. The left frame allows you to search your inventory by Category or Group.
2. Select a Category or Group. This is required.
3. Enter your keyword in place of the word 'Keyword' and select the field the keyword can be found in. This is not required; you may remove the word 'Keyword' to list all products.

4. Click the Search for Products button to bring up the right frame with a list of products (shown in figure 31). The right frame lists the items from your search and allows you to attach or detach products.
5. From the right frame Inventory Cross Sell page, click the box next to each product that is associated with the base product. Likewise, you can uncheck any attached products to remove them from the cross selling list. Click the Attach Products button to complete.

For each product you attach to your selected base product, a link will be available from the product detail page. The links will automatically be listed as Related Products.

Product page layout

A Product Detail page can be customized by using the Wizard button from the Editing Product page. There are two wizards available for products. The Product Standard wizard displays your product information in two rows of a table as shown in Figure 30. The Product Standard II wizard displays your product title in the first table row, image and description in the second table row, and product price, options, etc. in the third table row.

The Product Wizard Editor allows you to activate options for Centering, Headers, Footers, and Navigation. An example product page layout is shown in figure 32.

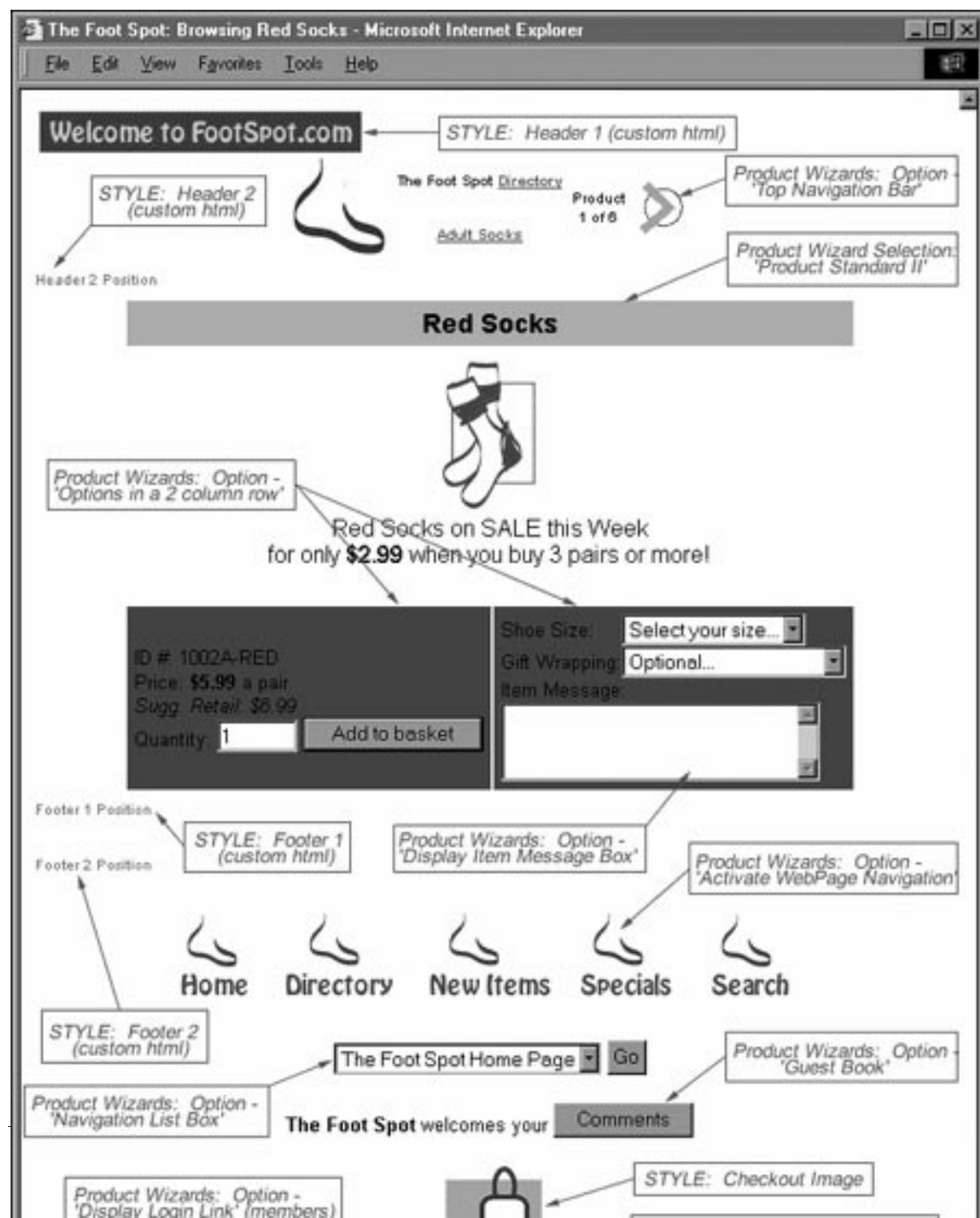


FIGURE 32. Product Page Layout

The Style attached to your product can be customized to change the following page properties. See Chapter 3 “Styles” for more information.

- **Headers and Footers:** These are custom unformatted fields.
- **Navigation Bar:** Change the table border width, table color 3, font face 2, font size 2; add your company logo, and custom forward and back arrows.
- **Wizard Output:** Change the table border width, table color 1, table color 2, table color 4, and font face 1.
- **Links to Active Web Pages:** Change with font face 2 and font size 2.
- **Navigation List Box with your Product Titles:** Change with font face 2 and font size 1. (Not all browsers support this feature.)
- **Guest Book:** Change with font face 2 and font size 2.
- **Login Link:** Display login link for member, non-member pricing. Change with font face 2 and font size 2.
- **Allow Customers to Check Orders:** If selected, a login link will be available for your customers to view past orders and resubmit orders. Change with font face 2 and font size 2.
- **Hide Checkout Image:** If selected, the checkout image will not be output for a particular page.
- **Hide All Pricing:** For items that may have frequently changing prices or for items on display only, activate this wizard option.
- **Hide Member Price from Non-Members:** Use this wizard option if you are running a member / non-member store and wish to hide special member pricing from your non-member shoppers.
- **Hide Basket:** If you want to remove the ability for someone to purchase an item, activate this wizard.

Most of the above items can be activated or deactivated with a check box selection from the Product Wizard page. The checkout image and wizard are always output on the Product page.

Wizard settings and options

You can update wizard settings for the current product, all products in a group, all products in a category, or every product in your store. If you use a multiple page update, you will not be allowed to preview or undo your changes. Update one product at a time, click Preview to see your changes and when you are satisfied with the results, update wizard settings and options for all products.

Product standard wizard - prdwiz01.cfm:

Available to all stores.

This wizard displays the product information in two table rows. Use this wizard if you want the product image to display before the product title and description. The product price, retail, unit, id, and options are displayed in the second table row.

Product standard II wizard - prdwiz02.cfm:

This wizard displays the product information in three table rows. Use this wizard if you want the product title to be displayed first in its own table row. The product image and description may be aligned in the second table row. The product price, retail, unit, id, and options are displayed in the third table row.

Product Wizard (Example Product 1)

Wizard: *** Product Standard** **Change**

This wizard displays the product detail page and any attached product options. The product title can be aligned with the image or shown below. Options available: product title font size, image alignment, product options in a separate column, and centering. This wizard can be used with a small, medium and large size store. The next page (optional) can display additional product details with option to buy.

☒ Update wizard for **this product only.**

☐ Update wizard for all **products** in this group. No Preview! Changes will be permanent.

☐ Update wizard for **ALL products** in this category. No Preview! Changes will be permanent.

☐ Update wizard for **ALL products in the store.** No Preview! Changes will be permanent.

Show **Product title** in a font size of Enter '0' to hide title and show an image only.

Show pricing in a font size of

Select Style: **Default**

Wizard Options **Click** **Preview** to see changes, when you're done go **Back** to Finish.

FIGURE 33. Product Wizard

The Product Wizard settings only affect the information being displayed from the wizard.

- **Set the font size of your product title:** Enter '0' to hide title and show image.
- **Set the font size of your product pricing information:** Affects price, retail, unit, id, and options.
- **Select your default store Style or attach a new one:** Changes wizard table properties and font face.

These are the Wizard Options available to the product wizards, check the box next to each option to activate.

- **Multiple-currency:** Displays the original price before conversion and the converted amount.
- **Auto-Centering:** Centers only automatic output information, this does not include your custom fields. If needed, apply HTML tags to <center> your custom text </center>.
- **Header 1, Header 2, Footer 1, Footer 2, and Footer 3:** Your custom text added in Styles.
- **Top and Bottom Navigation Bar:** Automatically generated, customize in Styles.
- **Web Page Navigation Links:** For your dynamic web pages that are active for viewing.
- **Navigation List Box:** Additional navigation to all products in a select box.
- **Guest Book:** Standard guest book, customize in the Comment area.
- **Center Title:** Center the product title. Only available to Product Standard II wizard.
- **Table Data 1 Centered:** Center the product image and description.
- **Table Data 2 Centered:** Center the product pricing, id, unit, etc.
- **Table Data 3 Centered:** Center the product options if you selected the wizard option to display options in a column.
- **More Detail Centered:** Center the product information on the 'More Detail' page, if used.
- **Options in a 2-column row:** Select to display product options in their own column in the last table row.
- **Login Link:** Select to display a link for member / non-member pricing. Activate only if this store is using the two pricing levels.
- **Item Message:** Select to display a text box on the product detail page.
- **Allow Customers to Check Orders:** If selected a login link will be available for your customers to view past orders and resubmit orders. Change with font face 2 and font size 2.
- **Hide Checkout Image:** If selected, the checkout image will not be output for a particular page.
- **Hide All Pricing:** For items that may have frequently changing prices or for items on display only, activate this wizard option.
- **Hide Member Price from Non-Members:** Use this wizard option if you are running a member / non-member store and wish to hide special member pricing from your non-member shoppers.
- **Hide Basket:** If you want to remove the ability for someone to purchase an item, activate this wizard.

Unless you are doing a multiple page update, you will need to click the Back button, return to Product Editing and click Finish to make your changes permanent.

Inventory - Product Options and Specials

This chapter describes the process of managing product options and product specials.

Product options

The Product Options page allows you to create unlimited options for each level. A store may have up to fifteen levels of options available to each product. Customize each option level with your own header to define the options list. For example, you may use a header of 'Color' to define the options list (red, blue, yellow, green, etc.).

An option may have an associated price, SKU, weight, or sorting assignment. If you have a base product but wish to use product options for pricing instead, you can enter a '0' into the product price field. The option SKU field may be an appendage to the SKU field for your product. If your shipping class is based on weight, enter an option weight if applicable.

The Product Options page can show you all active options for the selected product at a level or all options available at a level for a particular group. If you have no options active for a product, then you may want to check the box to show all available options in a group and click Update.

To change your option level, select the level from the drop-down selection box and click the Goto button.

Product Options (Swirl Tea Cups)

Update

Goto

1

☐ Display ALL options for this level.

Header 1:	<div></div> <div>Title for options select box (i.e. Color or Size)</div>
Active Options:	There are no options active for this product.
Available:	There are no options available to activate. Click 'Update' with the Display ALL options box checked.
Edit or delete:	There are no options available to edit or delete.

Title:

Price:

0

Option SKU:

Weight:

0

(lb) Sorted by:

1

Quantity

0

☐ Track Inventory

☐ Check to hide this option from the basket.

(i.e. The first option in the select box could read 'Select a Color' or 'Optional Accessories')

+ Add New Option

FIGURE 34. Product Options (None Available)

To add a product option:

1. From the Product page, select a product and click the Options button or click the Options button from the Product Editing page.
2. Enter a Header for your options list (optional).
3. Enter an Option title (required), price, SKU, weight, and sorted by field.
4. If this option is only used for informational or instructional purposes, you may check the box to hide this option from the basket.
5. Click the Add New Option button. Your option will automatically be attached to the product.

6. Repeat steps 3 and 4 to create more options for the selected level.
7. Select another level and click the Goto button to create options for a second level, and so on.

Product Options (Example Product 1)

Update Goto 1 - Option Header ☒ Display ALL options for this level.

Header 1: Option Header Title for options select box (i.e. Color or Size)

Active Options: (1) 1st priced option \$10.00 Deactivate

Available: (1) 2nd priced option \$20.00 Activate

Edit or delete: (1) 1st priced option \$10.00 * Edit - Delete

Title: Price: 0

Option SKU: Weight: 0 Sorted by: 1

☐ Check to hide this option from the basket.
(i.e. The first option in the select box could read 'Select a Color' or 'Optional Accessories')

+ Add New Option

FIGURE 35. Product Options (Options Available)

To deactivate a product option:

1. From the Product page, select a product and click the Options button or click the Options button from the Product Editing page.
2. Select from the Active Options list and click the Deactivate button.
3. You may need to check the box to activate all options in order to delete or edit an option that has been deactivated.

To delete a product option:

1. From the Product page, select a product and click the Options button or click the Options button from the Product Editing page.
2. Select from the Edit or Delete list of options and click the Delete button.
3. An option attached to any product cannot be deleted.

To edit a product option:

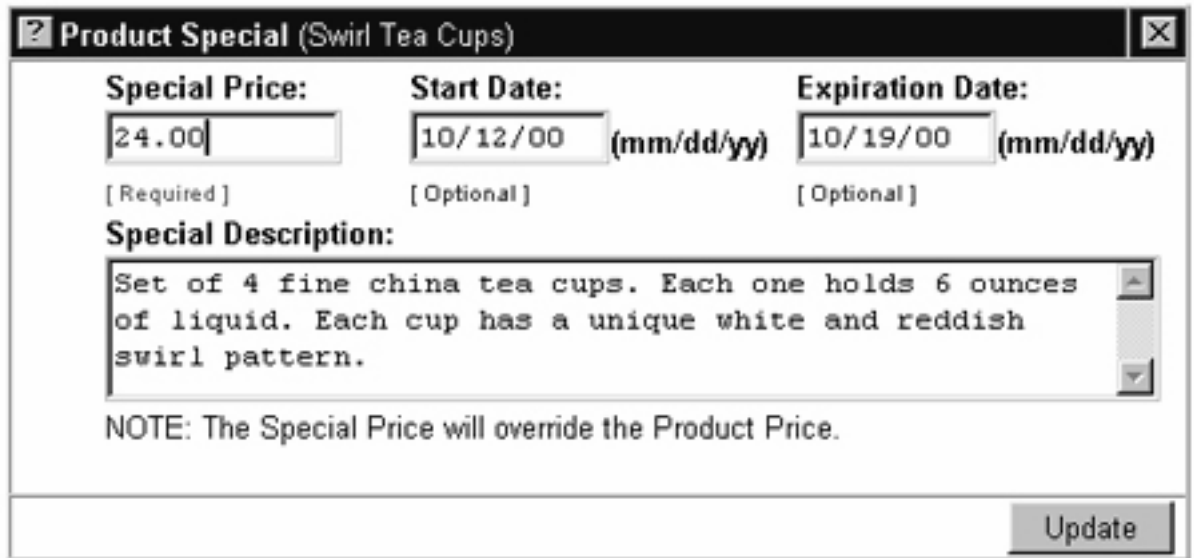
1. From the Product page, select a product and click the Options button or click the Options button from the Product Editing page.
2. Select from the Edit or Delete list of options and click the Edit button.
3. Your option will appear in the same fields used for adding a new option. Make your changes and click the Update Option button.

Product specials

Products may be sold at a discounted price for a limited time with the Product Specials feature. Select a product you want to apply a special to, and from the Product Editing page click the Specials button.

Enter a Special Price to override the price field on the Product Editing page. Enter a Start Date and Expiration Date for the special time period. By default, the Start Date is the current day and the Expiration Date is 1 week in the future.

Enter a Special Description to override the short description field on the Product Editing page. By default, the product short description field will be inserted into the Special Description field if available.



The image shows a web form titled "Product Special (Swirl Tea Cups)". It contains three input fields: "Special Price:" with the value "24.00" and a "[Required]" label below it; "Start Date:" with the value "10/12/00" and a "(mm/dd/yy)" label below it, with "[Optional]" also below it; and "Expiration Date:" with the value "10/19/00" and a "(mm/dd/yy)" label below it, with "[Optional]" also below it. Below these is a "Special Description:" label followed by a text area containing the text: "Set of 4 fine china tea cups. Each one holds 6 ounces of liquid. Each cup has a unique white and reddish swirl pattern." Below the text area is a note: "NOTE: The Special Price will override the Product Price." At the bottom right is an "Update" button.

Special Price:	Start Date:	Expiration Date:
<input type="text" value="24.00"/>	<input type="text" value="10/12/00"/> (mm/dd/yy)	<input type="text" value="10/19/00"/> (mm/dd/yy)
[Required]	[Optional]	[Optional]

Special Description:

Set of 4 fine china tea cups. Each one holds 6 ounces of liquid. Each cup has a unique white and reddish swirl pattern.

NOTE: The Special Price will override the Product Price.

Update

FIGURE 36. Product Special

After you have added a product special, click Update to return to the Product Editing page and click the Finish button. After a special expires, you can return to the Product Special page and change the expiration date to reactivate it. If you need to delete a special, click the Delete button from the Product Special page.

Inventory - Kitting

Kitting overview

A "kit" is composed of related products that are sold together in a bundle. Every kit has a master product, which is the container for the kit. A kit also has member products. The member products are attached to the master product and organized into groupings called "levels".

Member products in a kit can be required or optional. This is controlled by the level which products are attached to. Levels can be configured with different settings that change how (and if) member products are displayed.

Some kits may only have required products, like wrapped gift sets you can find in stores. The bundled package is sold as at a set price. Some kits may have optional products, like a computer that can be upgraded with additional components. The price may vary, depending on options selected by the customer.

Every kit has a base price and weight, which are the price and weight of the master product as listed in inventory. Member products in the kit can change these values with modifiers. The result is a product that will have a range of price depending on which member products are included in the kit purchase. The price ranges for the kit are displayed while editing a kit to enable merchants to hit target price points.

Inventory for a kit is handled somewhat differently than a regular product. Each master product has a quantity in inventory. However, the quantity of a kit is also determined by the available quantity of the member products. If you have required member products (as in a hidden level) that are out of stock, customers will not be able to purchase the kit as it will be out of stock as well. If you have optional items, they will be displayed with the words

"(out)" next to them on the product screen. Customers will not be able to purchase the kit with these optional items selected.

Kitting offers advantages over product options in that each "option" is a product in an of itself. You can choose to sell the product separately if you wish. Or you can mark the product as inactive and only sell it as part of the kit. You can also track inventory for the product. Aside from all these functions, you have more control over how the options are displayed.

Kitting also offers an advantage over cross-selling. Related items can be cross-sold from the same product screen as the master product. Customers will be able to add all related products to their basket at the same time, without the need to view each individual product.

Overall, kitting is a very powerful tool with lots of options. Products can be combined in an unlimited number of configurations. Merchants have more control over inventory and display of kit products. Customers can buy what they need all in one place. Kitting offers convenience that can help increase sales.

Creating a kit

The first step in creating a kit is to decide what product from your inventory is going to the "master product". The master product is the main product that all other products are attached to. The master product is also the product that will be viewed by customers when they want to purchase the kit. It should offer a title and description that gives an indication of what is included in the kit. It can be any existing product in your inventory. Once you have decided on a master product, complete the steps below.

To create a kit:

1. From the Merchant Menu, click Manage Kits. This will take you to a page depicted in figure 37.

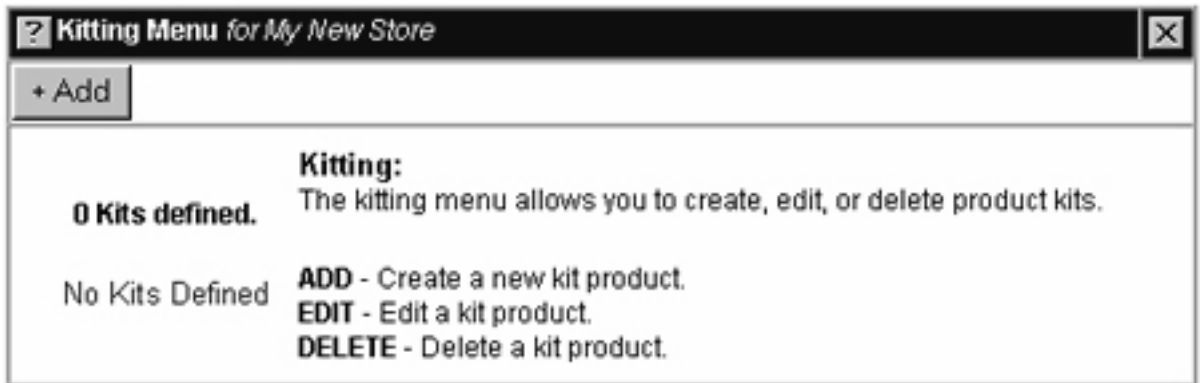
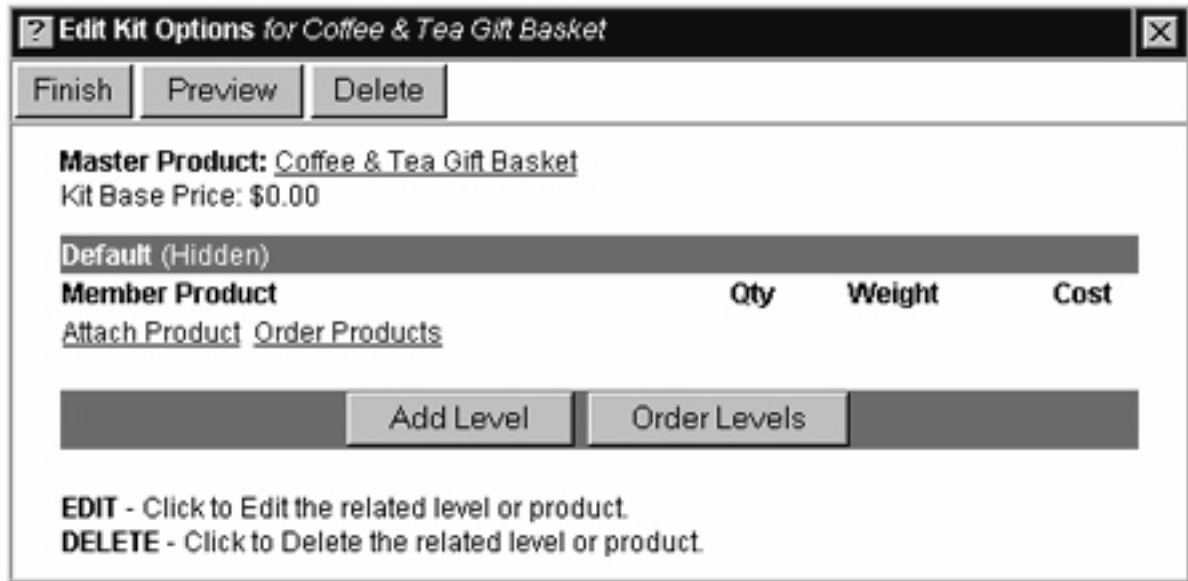


FIGURE 37. Kitting Menu

2. Click +Add.
3. From the drop-down box, select the Category that the master product is listed in and click Next.
4. From the drop-down box, select the Group the master product is listed in and click Next.
5. From the drop-down box, select the master product and click Finish. The item you select as the master product cannot already be the master product of another kit. Clicking Finish will take you to a page similar to figure 38. The product you selected is shown as the master product. From here, you can attach the products that will be included in the kit.

Edit kit contents

The Edit Kit Contents screen is shown in figure 38. This is where most of the editing for a kit takes place. From this screen, you can add, edit, delete, or rearrange the kit levels. You can also add, edit, delete, or rearrange the product contents for each level.



Edit Kit Options for Coffee & Tea Gift Basket

Finish Preview Delete

Master Product: Coffee & Tea Gift Basket
Kit Base Price: \$0.00

Default (Hidden)	Qty	Weight	Cost
Member Product			
<u>Attach Product</u> <u>Order Products</u>			

Add Level Order Levels

EDIT - Click to Edit the related level or product.
DELETE - Click to Delete the related level or product.

FIGURE 38. Edit Kit Options

When a kit is first created there is only one level available, called “Default”. It is a hidden level that exists for all kits. Products within the default level are not presented to the user as choices and are automatically included in the kit. This is true for any level that is *hidden*.

You cannot edit or delete the Default level. You may only add or remove products from it. You may choose not to place any items in the Default level (or any level, for that matter). This will not affect the display or usage of the Kit. Since hidden levels are never displayed, the Default level and its contents will always be hidden from your customers.

Creating levels

Levels are a way of grouping items within a kit. They can be displayed in different ways (or not at all) to give you complete flexibility in designing your kit. Each level has a unique type as well as properties that affect how it is shown on your product pages.

There are four different display styles: Hidden, Select Box, Check Box, or Radio.

The first step in creating a level is to decide which of these styles to use. Following is a description of each type and situations where it might be used.

Hidden: Hidden levels are not displayed to the customer. Any product contained in a hidden level is automatically included in the purchase. This type of level is used when you want to include items as a mandatory part of the kit.

Select Box: Select Box levels combine products into a list for a customer to pick from. These levels can either be configured as a drop down list or a scrolling list. You can also choose to allow multiple selections within the list. Select boxes without multiples are good if you want the customer to choose one and only one item from the list. Select boxes with multiples work if you want the customer to choose zero or more items.

Check Box: Check Box levels show products with a box that can be toggled on or off. The products can be displayed in up to 10 columns. Check Boxes are good for items that are optional and the customer can include zero or more of them in the kit purchase.

Radio: Radio levels show the contents of the level with a radio button next to each. You can display the products in up to 10 columns. This works for levels where you want the customer to choose one and only one item from the list.

It is very important to note the number of products which can be selected for each level. For hidden levels, ALL items are included. For standard select box and radio levels, one and only one item is chosen. For multiple select box and check box levels, zero or more items can be chosen.

Also note that select box and radio levels can have “header” options. These header options can be displayed in the list of products and, if selected, will not cause an item to be chosen for the level in which it appears. This is useful if you want a level that allows a zero or one item choice.

To create select box options:

1. From the Merchant Menu, click Manage Kits.
2. In the list of available kits, click on the one you want to edit.
3. Click *Edit.
4. Click the button named Add Level.
5. In the Level Title text box, enter text you want to appear before the product choices.
For example, if you are giving your customer a choice between computer monitors, you may want to enter "Select Monitor".
6. From the Display Style drop-down box, choose Select box.
7. Click Next.

8. In the Size text box enter a number between 1 and 10. The number you enter determines the number of rows shown for your select box with 1 being the smallest.
9. Do one of two things:
 - Click the Multiple Select box if you want your customers to be able to choose zero or more products from the list.
 - Don't select the Multiple Select check box if you want your customers to select one and only one option.
10. Enter a title in the Header Option text box. (optional)
11. If you want to change how the title cell of the select box is formatted, you can change the variables in the Title Cell Format text box.
12. Click Finish.

To create check box options:

1. From the Merchant Menu, click Manage Kits.
2. From the Kit Defined scroll list, select the kit that you want to add options to.
3. Click *Edit.
4. Click the button named Click to Add a Level.
5. In the Level Title text box, enter text you want to appear before the product choices. For example, if you want your customers to be able to add as many books to the kit for an extra cost, you can enter "Select any of the following books for only \$5 per book".
6. From the Display Style drop-down box, select Check Box.
7. Click Next.
8. In the Columns text box, enter a number between 1 and 10. The number of columns determines how the check boxes will be laid out. For example, if you have 5 options and you decide to have 2 columns, you will have two rows of two check boxes and one row with one check box. If you decide to have 5 columns, all 5 check boxes will be laid out in a single horizontal row.
9. If you want to change how the check box is aligned on the page, you can change the variables in the Title Cell Format text box.

To create radio buttons options:

1. From the Merchant Menu, click Manage Kits.
2. From the Kit Defined scroll list, select the kit that you want to add optional products to.
3. Click *Edit.
4. Click the button named Click to Add a Level.

5. In the Level Title text box, enter text you want to appear before the product choices. For example, if you are kitting computer monitors and the monitors come in 5 different colors, you can enter, “Select the color for your monitor”.
6. From the Display Style drop-down box, select Radio.
7. Click Next.
8. In the Columns text box, enter a number between 1 and 10. The number of columns determines how the check boxes will be laid out. For example, if you are going to have 5 options and just 1 column, all 5 radio buttons will be listed in a single row vertically.
9. If you want to change how the radio buttons are going to be aligned on the page, you can change the variables in the Title Cell Format text box.
10. Click Finish.

To edit a select box, check box, or radio buttons:

1. Click the corresponding Edit for the level you want to edit.
2. Make the necessary changes. You can even change a select box to radio buttons, radio buttons to a select box, etc.
3. Click Next to go to the next page. Make any necessary changes.
4. Click Finish to save.

To delete a select box, check box, or radio buttons:

1. Click the corresponding Delete for the level you want to delete.
2. You will be asked if you are sure you want to delete the kit and associated kit products. Click OK to finalize or Cancel if you change your mind. All options that you have listed in the level will be deleted.

To rearrange the order of levels:

If you created multiple levels, you may want to rearrange the order in which they appear. This can be done using the Order Levels button.

1. From the Edit Kit Options page, click the button named Order Levels. It is located beneath the last level you have listed.
2. From the list of levels, select the level that you want to move up or down in the list.
3. Click the up or down arrow to move the level accordingly.
4. Click Finish to save.

Attaching a product

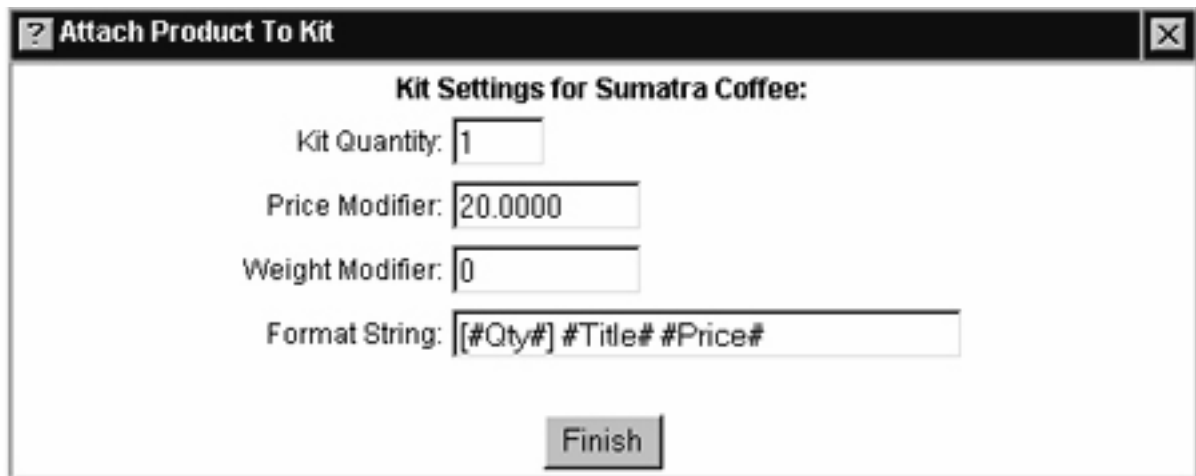
To attach a product to a kit, first decide which level the product will be a member of. Click the Attach Product link at the bottom of that level's product listings. Now you must browse to the product.

A drop-down list with all of your store categories will be displayed. Select from the list the Category that contains the product you wish to add. Click Next.

A drop-down list with all groups in your chosen category will be displayed. Select from the list the Group that contains the product you wish to add. Click Next.

A drop-down list of all available products in your chosen category will be displayed. Select from the list the Product you wish to add. Click Next. (Note that products which are master kit products will not be displayed because you cannot have a kit within a kit.)

The screen should now be similar to the one depicted in figure 39. This page allows you to configure the kit settings for this product. When adding a product to a kit, you can assign a kit quantity, price modifier, weight modifier, and a format string. The information that automatically fills the text boxes is based on what was entered when you added the product to your store's inventory.



The screenshot shows a window titled "Attach Product To Kit" with a close button in the top right corner. Inside the window, the text "Kit Settings for Sumatra Coffee:" is centered. Below this, there are four input fields: "Kit Quantity:" with the value "1", "Price Modifier:" with the value "20.0000", "Weight Modifier:" with the value "0", and "Format String:" with the value "[#Qty#] #Title# #Price#". At the bottom center of the window is a button labeled "Finish".

FIGURE 39. Attach Product to Kit

Kit Quantity: This allows you to adjust the number of the item which will be included in the kit. If you have inventory control turned on, the kit product inventory will be adjusted appropriately based on this number. In this field, enter the quantity of the selected product you wish to include in your kit.

Price Modifier: This is the amount by which the kit base price changes when the item is included in the kit purchase. This can be any number, positive or negative. You may wish to offer discounts on kitted items by making the price modifier less than the price of the item alone. Or perhaps offer a discount on a kit with less expensive components by setting the price modifier to a negative number. The price modifier is NOT multiplied by the kit quantity when the kit price is calculated. In this field, enter the total price modifier for the kit product at the quantity specified.

Weight Modifier: This is the amount by which the kit base weight changes when the item is included in the kit purchase. This can affect shipping charges. If a product shipped as part of a kit has a different shipping weight than when shipped alone, this setting allows you to compensate for that difference. The weight modifier is NOT multiplied by the kit quantity when the kit weight is calculated. In this field, enter the total weight modifier for the kit product at the quantity specified.

Format String: The format string determines how a product will be displayed to the customer. You can use variables and static text to create the exact look you want. Three variables are available, #Qty#, #Title#, and #Price#. You may choose not to include the variables in the format string, or to include them multiple times. If you wish to change this from the default, see Format string variables later in this chapter.

When you are done entering the kit settings for your product, click Finish. This should return you to the screen shown in Figure 40.

? **Edit Kit Options** for Coffee & Tea Gift Basket

Finish Preview Delete

Master Product: Coffee & Tea Gift Basket
 Kit Base Price: \$46.00
 Price Range with Options: \$46.00 - \$46.00
 Price of Default Configuration: \$46.00

Default (Hidden)

Member Product	Qty	Weight	Cost	
Sumatra Coffee	1	0	\$20.00	Edit Delete
Almond Biscotti	1	0	\$10.00	Edit Delete
Vanilla Syrup	2	0	\$6.00	Edit Delete
Earl Grey Tea	1	0	\$5.00	Edit Delete
Peppermint Tea	1	0	\$5.00	Edit Delete

[Attach Product](#) [Order Products](#)

Add Level Order Levels

EDIT - Click to Edit the related level or product.
DELETE - Click to Delete the related level or product.

FIGURE 40. Edit Kit Options

This shows an example of a kit which has 5 member products in the default level. At the top of the screen, the master product is listed. The kit base price and price range are computed for you. The price modifiers for member products are applied to the kit base price as appropriate to compute these ranges.

If you need to change a product's quantity, price, or weight, click the Edit link that corresponds to the product listing. Click the delete link if you no longer want the item attached to the kit. This only removes the kit association, it does not delete the product itself. To add another item to your kit, click Attach Product and follow the steps as detailed above.

Examples of adding products to a kit

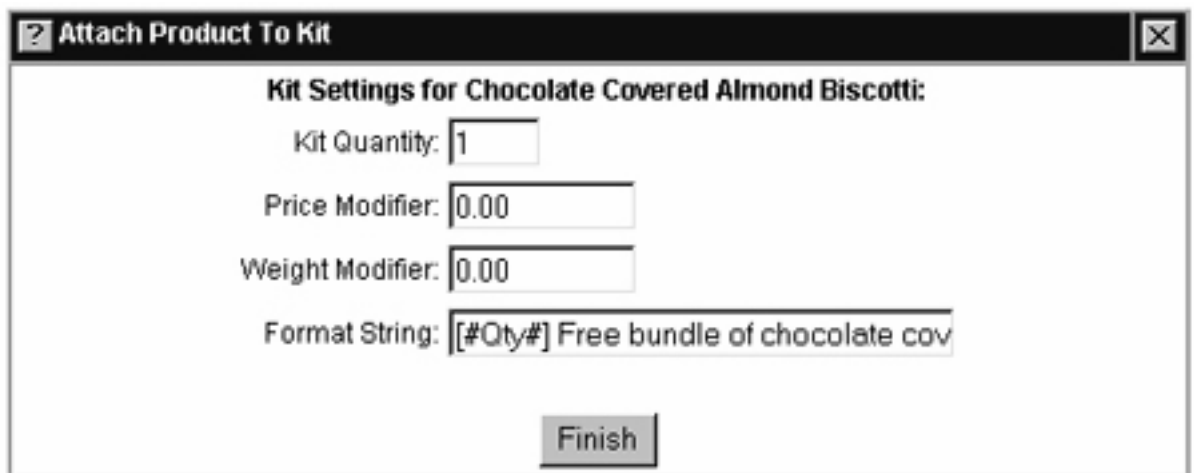
The following information shows two examples of adding options to a kit.

Example 1: Figure 41 shows the Kit Settings page for the following example.

A Coffee and Tea Gift Basket is the master product of a kit. The gift basket has several items that are automatically included, meaning the products are in a hidden level. As a gift to the customer, a bundle of biscotti will be included for free. There are two different flavors of biscotti available the customer can choose from. In order to enable a customer to select a flavor, a new level needs to be created.

Radio buttons are used to display the 2 flavors of biscotti. The reason the radio button format was chosen is so the customer needs to select one flavor, but not both. The price listed in the Price Modifier text box has been changed to 0.00 since the biscotti is free. If the price hadn't been changed to zero, the customer would have been charged the full price of the biscotti at checkout.

The variables in the format string determines how the options will be displayed to the customer. The information listed in the Kit Quantity and Price Modifier text boxes replace the variables [#Qty#] and #Price# and the product title replaces the #Title# variable. You can always delete variables or rearrange them so they are displayed the way you want. The variables for this example have been altered some. Since the [#Qty#] variable was left in the format string, the quantity {1} will appear. The price and weight variables have been removed and replaced with the text "Free bundle of chocolate covered almond biscotti". The customer will see "[1] Free bundle of chocolate covered biscotti". The same procedure will need to be done for the other flavor of biscotti.



The screenshot shows a dialog box titled "Attach Product To Kit" with a close button (X) in the top right corner. Inside the dialog, the title "Kit Settings for Chocolate Covered Almond Biscotti:" is displayed. Below the title are four input fields: "Kit Quantity:" with the value "1", "Price Modifier:" with the value "0.00", "Weight Modifier:" with the value "0.00", and "Format String:" with the value "[#Qty#] Free bundle of chocolate cov". At the bottom center of the dialog is a button labeled "Finish".

FIGURE 41. Attach Product to Kit

From the settings, it shows:

- 1 bundle of chocolate covered almond biscotti is going to be attached to the kit.
- There is no added cost to the kit (price is zero).
- There is no added weight to the kit (weight is zero).
- The radio button will display “[1] Free bundle of chocolate covered biscotti”.

Example 2: Figure 42 shows Kit Settings page for the following example.

This example uses the same Coffee and Tea Gift Basket example used above. Along with the products automatically included in the kit and the free bundle of biscotti, customers will also have the option to add extra syrup flavors to the kit. Any extra flavors the customer chooses to add to the kit will increase the cost of the kit. Because there is a cost for extra flavors, the options will be displayed in a multiple select box. Having a multiple select box, enables a customer to choose as many flavors as they like. However, customers shouldn't be required to select a flavor that is not automatically included in the cost of the kit. For this reason, a product named “No extra flavors” was created. A customer who doesn't want to add extra flavors can select “No Extra Flavors” and not be charged an added cost. Since a customer will be charged for any extra flavors, the price listed in the Price Modifier text box hasn't been changed. For each extra bottle of syrup a customer selects, \$3 will be added to the total of the kit price.

In the Format String, the quantity and the price variables have not been altered but the title has been replaced with “bottle of vanilla”. If the title wasn't replaced, the title would display as “Vanilla Syrup”. This would have been fine, but sometimes an expansion on the title doesn't hurt. The customer will see “[1] bottle of vanilla \$3.00”.

The screenshot shows a dialog box titled "Attach Product To Kit" with a close button (X) in the top right corner. The main content area is titled "Kit Settings for Vanilla Syrup:". Below this title, there are four input fields: "Kit Quantity:" with the value "1", "Price Modifier:" with the value "3.00", "Weight Modifier:" with the value "1.00", and "Format String:" with the value "[#Qty#] bottle of vanilla.#Price#". At the bottom center of the dialog box is a "Finish" button.

FIGURE 42. Attach Product to Kit

From the settings it shows:

- 1 bottle of vanilla syrup will be included in the kit (if the customer decides they want this extra optional item).
- \$3 will be added to the cost of the kit.
- 1 pound will be added to the shipping weight of the kit.
- The select box will display “[1] bottle of vanilla \$3.00”.

To have an option selected as the default:

Note: Before you can select the default product option, you must first create the level and then add your options.

1. Click Edit for the Level that your options are listed in.
2. Click Next.
3. From the Default Choices scroll box, select the product that you want selected as the default.
4. Click Finish.

To edit a product listed in a level:

1. Click the corresponding Edit for the product in the level.
2. Make the necessary changes.

3. Click Finish.

To delete a product listed in a level:

1. Click the corresponding Delete for the product in the level you want to remove.
2. You will be asked if you are sure you want to remove the product. Click OK to finalize or Cancel if you change your mind.

To rearrange the list of products in a level:

You may want to rearrange the order in which the products appear. This can be done using the Order Products link.

1. From the Edit Kit Options page, click the link named Order Products. Be sure to click the link listed beneath the correct level.
2. From the list of products, select the product that you want to move.
3. Click the up or down arrow to move the product accordingly.
4. Click Finish to save.

Format string variables

The variables in the format string control how the kit options are displayed to the customer. You can edit how products will be displayed to customers as long as the products aren't listed in a hidden level. Without editing the variables in the format string, the number listed in Kit Quantity will replace the [#Qty#] variable, the cost listed in Price Modifier will replace the #Price# variable and the title of the product will replace the #Title# variable. These are the only three variables that are used. You can leave out a variable, you can rearrange the variables, you can use a variable more than once, or you can add to the title variable or change it all together. Table 1 shows different ways you can alter the format string, thereby altering the way the option will appear on the Product page.

Format String Example: The merchant is selling a coffee and tea gift basket. Most of the products included in the gift basket are hidden. Hidden items are included in the gift basket and the customer cannot remove or add products to the basket. However, the merchant does want to give their customers a choice between a free box of herbal tea and a free box of black tea. To do this, the merchant created a new level that wasn't hidden so the customer can pick which kind of tea they want to add to their kit. Table 1 shows some of the ways the format string can be altered. The column named "Displays As" shows what will appear on the Product page. The first example listed in table 1 shows how the product will be displayed on the Product page without any of the variables in the format string being altered.

Table 1 uses the following kit setting.

- Product Title: Herbal Tea
- Kit Quantity: 1
- Kit Price: 0.00 (Because it is going to be free, the price was changed from \$5 to \$0. If the price wasn't changed, \$5 would be added to the total cost of the kit.)

TABLE 1. Format String Examples

Example	Format String Variables	Displays as
Default	[#Qty#] #Title# #Price#	[1] Herbal Tea 0.00
Remove variables	[#Qty#] #Title#	[1] Herbal Tea
Add words	[#Qty#] Free box of #Title#	[1] Free box of Herbal Tea
Use without variables	Free box of herbal tea.	Free box of herbal tea.
Use variables more than once	[#Qty#] #Title# #Qty# free box of #Title#	[1] Herbal Tea 1 free box of Herbal Tea
Add a number	[#Qty#] Our #1 favorite #Title#	[1] Our #1 favorite Herbal Tea

Viewing your kit

At any time during the creation of your kit, you can preview how it will look on the Product page. By clicking Preview on the Edit Kit Options page, you can see how your kit will look to customers viewing your site. Figure 43 shows an example of how the Coffee and Tea Gift basket will appear.

Coffee & Tea Gift Basket

The Coffee & Tea Gift Basket includes your choice of a vacuum packed bag of whole bean Sumatra coffee or a vacuum packed bag of ground Sumatra coffee, a bundle of almond biscotti, two 12 ounce bottles of vanilla flavored syrup, a box of peppermint tea, and a box of eud grey tea. At no cost, choose an extra bundle of either the mint covered chocolate biscotti or the chocolate covered almond biscotti. You can expand your gift basket to include more flavored syrups and tea.

ID #: No_Sku
Price: **\$46.00**
Sugg. Retail: \$117.00

Free! Pick your favorite flavor

☐ [1] Free bundle of mint covered chocolate biscotti
☒ [1] Free bundle of chocolate covered almond biscotti

Do you want ground or whole bean coffee?

☒ [1] Whole Bean
☐ [1] Ground

Add flavor to your gift basket

Choose as many as you like
 No extra flavors
☒ [1] bottle of vanilla \$3.00
☐ [1] bottle of raspberry \$3.00
☐ [1] bottle of hazelnut \$3.00

Add tea to you gift basket

☒ [1] box of green tea for \$5.00 ☒ [1] box of apple & cinnamon for \$5.00
☒ [1] box of lemon tea for \$5.00

Quantity:

FIGURE 43. Preview Kit

The \$46 shows the cost of the kit without any of the extra options. Radio buttons are used for the first group of options so the customer can choose only one of the two choices. A select box with multiple select turned off is used for the second group of options so the customer is able to choose only one of the options. The first two products are actually already included in the kit under the hidden level, but since the customer needs to be able to select the flavor of the free biscotti and whether their gift basket contains whole bean or ground coffee, another level needed to be created listing the options.

The third group of options, uses a select box with multiple select turned on so the customer is able to add as many bottles of syrup to the kit as they want. Because with the select box a customer must select at least one option, a product named “No extra flavors” was added to the list of options. This is done so a customer who doesn’t want to add extra bottles of syrup to their kit for an added cost isn’t forced to choose one.

The last group of options is in check box format. Using the check box format, a customer is not required to select an option, but they can also select all of the options if they want. A product named “No extra tea” was not needed because with a check box, customers are not required to choose an option.

When a customer adds products with added costs to their kit, the added cost of the items will not appear until the customer clicks Add to Basket. Once the kit is added to the basket, the customer will see the total cost of the kit minus the tax and shipping cost. The page customers go to when they click Add to Basket is similar to figure 44.

SKU	Item in Basket	Qty.	Price	Ext. Price	Remove
No_Sku	Coffee & Tea Gift Basket Base Price: \$46.00 <ul style="list-style-type: none"> [1] Free bundle of chocolate covered almond biscotti. [1] Whole Bean [1] bottle of hazelnut \$3.00 [1] bottle of vanilla \$3.00 [1] box of apple & cinnamon for \$5.00 [1] box of green tea for \$5.00 [1] box of lemon tea for \$5.00 Price With Options: \$67.00	1	\$67.00	\$67.00	<input type="checkbox"/>
			Subtotal:	\$67.00	

FIGURE 44. Contents of Shopping Basket

To preview how your kit will appear:

1. From the Merchant Menu, click Manage Kits.
2. From the Kit Defined scroll list, select the kit you want to look at and click *Edit. This will take you to the Edit Kit Options page.
3. Click Preview.

To save your kit:

1. From the Edit Kit Options page, click Finish.

To edit a kit:

1. From the Merchant Menu, click Inventory.
2. Click Manage Kits.
3. Select the kit from the Kit Defined scroll list that you want to edit.
4. Click *Edit.

5. You can attach more products by clicking Attach Product. You can edit or delete an item in the kit by clicking the corresponding Edit or Delete. When you have made your necessary changes, click Finish.

To delete a kit:

1. From the Merchant Menu, click Inventory.
2. Click Manage Kits.
3. Select the kit from the Kit Defined scroll list that you want to delete.
4. Click -Delete.
5. You will be asked if you are sure that you want to delete the selected kit. Click OK to finalize or Cancel if you change your mind.

This chapter contains information on creating, editing, and assigning discount methods.

Add discounts

You can setup custom discount methods and apply them to your categories, groups, or products. Discounts can be a percentage off a product or a dollar amount off a product. Set minimum and maximum purchase requirements for discounts to apply.

Discount Methods for <i>Example Store</i>			
Discount Method	Discount Amount	Product Min.	Product Max.
<u>No Discount</u>	price x 0.0	0	10000
<u>5% off on Qty. 1 to 5</u>	price x 0.05	1	5
<u>10% off on Qty. 6 to 10</u>	price x 0.1	6	10
<u>15% off on Qty. 11 to 15</u>	price x 0.15	11	15
<u>20% off on Qty. 16 to 20</u>	price x 0.2	16	20
<u>25% off on more than 25</u>	price x 0.25	26	5000
		Add Discount Method	

FIGURE 45. Discount Methods

To add a discount:

1. From the Merchant Menu, click the Discounts image.
2. From the Discount Methods page, click the Add Discount Method button.
3. Enter a custom Discount Method name describing your discount type.
4. Select a discount type; Percentage Off or Dollar Amount Off.
5. Do one of the following:
 - If the discount is by percentage, enter the discount amount in decimal format (i.e. 0.05 = 5%).
 - If the discount is a dollar amount, enter the discount amount in a number format (i.e. 5 = \$5.00).
6. Enter the minimum purchase required for the discount to take effect. Enter '1' for no minimum purchase.
7. Enter the maximum number of products that can be purchased with the discount. Enter a large number if there is no limit on products purchased.
8. Click Update to add the discount and return to the Discount Methods page.

Edit or delete discounts

To edit a discount method:

1. From the Merchant Menu, click the Discounts image.
2. From the Discount Methods page, click an existing Discount Method link.
3. Modify the fields on the Edit Discount Method page as needed.
4. Enter a different Discount Method name.
5. Change the discount type; Percentage Off or Dollar Amount Off.
6. Modify the Discount Amount. If the discount is by percentage, enter the Discount Amount in decimal format. If the discount is a dollar amount, enter the Discount Amount in a number format.
7. Enter the minimum purchase required for the discount to take effect. Enter '1' for no minimum purchase.
8. Enter the maximum number of products that can be purchased with the discount. Enter a large number if there is no limit on products purchased.
9. Click Update to modify your discount and return to the Discount Methods page.

Edit Discount Method for Example Store

Discount Method:
5% off on Qty. 1 to 5 [Required]

Discount Amount:
0.05 [Required]

Product Minimum:
1 [Required]

Product Maximum:
5 [Required]

☒ **Percentage Off** (i.e. 0.5 = 0.5%)
☐ **Dollar Amount Off**

Update **Delete**

FIGURE 46. Edit Discount Method

To delete a discount method:

- 1. From the Merchant Menu, click the Discounts image.
- 2. From the Discount Methods page, click an existing Discount Method link.
- 3. Click the Delete button for a confirmation page.
- 4. Click Yes to permanently delete the discount method. This will delete the discount even if it is attached to an inventory item.

Apply a discount

After a discount method is created, you may apply it to your inventory items. If you apply a discount method at the category level, it will affect all attached groups and products. If you apply another discount to a group in a category that has a discount already applied, the group discount will override the category discount. Likewise, you may apply a discount to a product in a category or group that has a discount already applied to override all previous discounts.

Discount Methods for <i>Example Store</i>				
Discount Method	Discount Amount	Min Qty.	Max Qty.	Attached
No Discount	price x 0.0	0	10000	<input type="checkbox"/>
5% off on Qty. 1 to 5	price x 0.05	1	5	<input checked="" type="checkbox"/>
10% off on Qty. 6 to 10	price x 0.1	6	10	<input checked="" type="checkbox"/>
15% off on Qty. 11 to 15	price x 0.15	11	15	<input checked="" type="checkbox"/>
20% off on Qty. 16 to 20	price x 0.2	16	20	<input checked="" type="checkbox"/>
25% off on more than 25	price x 0.25	26	5000	<input checked="" type="checkbox"/>
				Attach Selected Methods

FIGURE 47. Attach a Discount

Several discount methods may be applied to a category, group, or product, allowing a range of possible discounts.

To apply a discount to a category:

1. From the Editing Category page, click the Discount button.
2. Check the box to attach one of your custom discounts to an entire category of groups and products.
3. Click the Attach Selected Methods button to return to the Editing Category page.
4. Click the Finish button to apply the discount method.

To apply a discount to a group:

1. From the Editing Group page, click the Discount button.
2. Check the box to attach one of your custom discounts to a group and all attached products. This will override any previously attached category discount.
3. Click the Attach Selected Methods button to return to the Editing Group page.
4. Click the Finish button to apply the discount method.

To apply a discount to a product:

1. From the Product Editing page, click the Discount button.
2. Check the box to attach one of your custom discounts to a product. This will override any previously attached category or group discount.
3. Click the Attach Selected Methods button to return to the Product Editing page.
4. Click the Finish button to apply the discount method.

This chapter contains information on processing and archiving orders. By activating the wizard option to allow customers to check orders, you can give your customers the ability to review past and present orders. They can even resubmit a copy of a previous order.

Processing pending orders

After a customer completes an order, you will find the order information in the Check Orders area of your store. From the Merchant Menu, click the Check Orders image. If your store does not have its own secure domain name, you will most likely be prompted with your user name and password. During order processing, your session will time-out in one minute (a normal session time-out is ten minutes). This means that if there is no activity within one minute, you will be prompted with a login page to re-enter your user name and password.

Your new unprocessed orders will automatically appear on the Check Orders page. You will be able to preview the order number, order date and time, billing name, shipping name, and order status. The unprocessed orders are shown in the order which they were received. When you click Check Orders from the Merchant Menu, you will be shown the Check Orders page depicted in figure 48.

? **Check Orders**
✕

Show Pending orders from: 10/03/00 to 11/03/00

☒ Show Current
 ☐ Show Archived
 ☐ Show Both

[Advanced Search](#)
Search

Select	Order #	Order Date	Billing To	Shipping To	Status
<input type="checkbox"/>	VIEW #8	01-Nov-2000 10:08 AM	Mary Jacobson	Mary Jacobson	Pending
<input type="checkbox"/>	VIEW #9	01-Nov-2000 10:49 AM	Steve Bergman	Steve Bergman	Pending
<input type="checkbox"/>	VIEW #14	02-Nov-2000 9:26 AM	Steve Bergman	Steve Bergman	Pending
<input type="checkbox"/>	VIEW #15	02-Nov-2000 9:54 AM	Heather Larson	Heather Larson	Pending
<input type="checkbox"/>	VIEW #16	02-Nov-2000 9:57 AM	Mark Krystek	Mark Krystek	Pending

Clear All
Select All
Paid
Ship
Cancel
Delete

Delete Users Without Orders

FIGURE 48. Check Orders

When you click Check Orders from the Merchant Administration menu, it will automatically show pending orders for the last week. Pending orders are orders that have been placed and haven't been processed. Figure 48 shows 5 pending orders. In addition to pending orders, you can also view orders that have been shipped, cancelled, charged back, and paid. You can view any of these order for any date range.

Pending orders: Orders that have not been processed yet (money hasn't been taken and merchandise hasn't been shipped.). When you are first notified of an order and you go to Check Orders, the order status will be marked as Pending if you don't have a real-time payment processor setup and your customer is planning on paying with a credit card or if your customer selected Call Me or Fax Order In as a payment option.

Paid orders: Orders that have been paid but the merchandise hasn't been shipped to the customer yet. You have received money for an order. If you have a real-time payment processor setup and you go to Check Orders, the order status will be marked as Paid as long as the credit card was accepted.

Cancelled orders: Orders that have been paid or shipped and the customer either decided they no longer want the merchandise so they call and cancel the order before the merchandise was even shipped or the merchandise was shipped but the customer returns the merchandise that can be resold. In these cases, you will want the inventory to be adjusted. For example, if a customer purchases a coffee maker with their Visa card and you have a real-time payment processor setup, the inventory will automatically reflect the coffee maker as being sold. If the customer calls to cancel their order, you will want the inventory to be re-calculated to account for the coffee maker that can be sold again.

Deleted orders: Any type of order (pending, paid, or shipped) that you want to permanently delete from your records. You will no longer be able to view a deleted order.

Charged back order: Charge back orders are orders that have been marked as shipped but funds were either not received from the customer or returned to the customer. You will want to mark an order as Charged Back in instances such as the customer claims the merchandise was never received, or the customer completed a charge back on the credit card, merchandise was damaged in shipment, merchandise was paid with a stolen credit card, etc. Inventory will not be readjusted. Charge back keeps track of your losses. Any orders marked as charge back means that the merchandise was removed from inventory but funds were not received.

Archived order: Archived orders are orders that have been marked as Shipped, Cancelled, or Charge Back. Archiving orders is a way of keeping track of old order. You will always be able to view archived orders.

To view an order:

1. From the Merchant Administration menu, click Check Orders.
2. Click the order number you want to view. This will take you to a page similar to figure 49.

Order 15, Date: 02-Nov-2000, 9:54 AM for New Store

Paid

Ship

Cancel

Delete

Bill To:

Our Store

Heather Larson

7894 Washington Street

Montesano, Washington

98563

United States

Phone: 555-412-2145,

Fax: 555-785-4582

user@your_domain.com

Order Status: Pending

Payment Method: Visa

Card Number: 4111111111111111

Expires: 9-02

Authorization Number:

Ship To:

Our Store

Heather Larson

7894 Washington Street

Montesano, Washington

98563

United States

Phone: 555-412-2145,

Fax: 555-785-4582

user@your_domain.com

Tracking Number:

SKU	Item in Basket	Qty.	Price	Ext. Price
5214938	Holiday Decorations	1	\$15.00	\$15.00
Subtotal:				\$15.00

None Tracking Number:

Update

FIGURE 49. View Pending Order

This page shows the customers billing and shipping information, the items that have been purchased or intend to be purchased, the total cost of the order, and the payment method.

If you have a tracking number you can enter it in the Tracking Number text box. This will enable you to be able to go back and check on the tracking number if needed.

A pending order can be either marked as Paid, Shipped, Cancel, or Delete. An order marked as shipped is assumed to be paid as well. An order marked as Paid means that the merchandise has not been shipped out yet. If you cancel an order, inventory will be re-adjusted. If you delete an order, it will be deleted for good; you cannot view a deleted order. You cannot charge back an order unless it has been marked Shipped.

Archived orders

Once an order is processed (archived), the billing and shipping information and purchase details will always be available for viewing. For security reasons and your own protection, archived credit card numbers will only have the first two digits and last four digits and the expiration date will read "processed".

To delete archived orders:

1. From the Merchant Menu, click Check Orders.
2. Enter a different date range if needed.
3. From the Show drop-down box select All (or whatever status of archived orders you want to delete).
4. Select Show Archived from the radio button selections and click Search.
5. Select the orders you want to delete and click Delete.
6. You will be asked if you want to permanently delete the selected order(s). Click OK to finalize or Cancel if you change your mind.

Multiple Currency

Multiple currency enables merchants to display their country's currency along with the converted currency of another country. For example, a company located in France can not only show the cost of products in francs, but can also display the cost of another currency such as the Euro.

Setting up multiple currency

When you click Multi-Currency from the Merchant Administration menu, you will be taken to a page as shown in figure 50. The information that automatically appears in the text boxes comes from the Currency Format you selected in Company Info.

The screenshot shows a dialog box titled "MultiCurrency Settings for jen store". It contains several settings for currency conversion. The "Show converted amount on Basket/Invoice pages?" option is set to "No". The "Prefix for converted amounts:" is set to "EUR". The "Suffix for converted amounts:" is empty. The "Thousands Separator:" is set to ".". The "Decimal Separator:" is set to ".". The "Current Conversion Rate" is set to "0.736". Below these settings, there is a note: "Should be entered in the standard format: e.g.: 1 \$SOURCE = <rate> DEST". At the bottom, there is a "Preview" button and a "Finish" button. The preview text shows: "Preview: \$1,000,000.00 / EUR736,000.00".

MultiCurrency Settings for jen store

Show converted amount on Basket/Invoice pages? ☐ Yes ☒ No

Prefix for converted amounts:

Suffix for converted amounts:

Thousands Separator:

Decimal Separator:

Current Conversion Rate

Should be entered in the standard format:
e.g.: 1 \$SOURCE = <rate> DEST

Preview: \$1,000,000.00 / EUR736,000.00

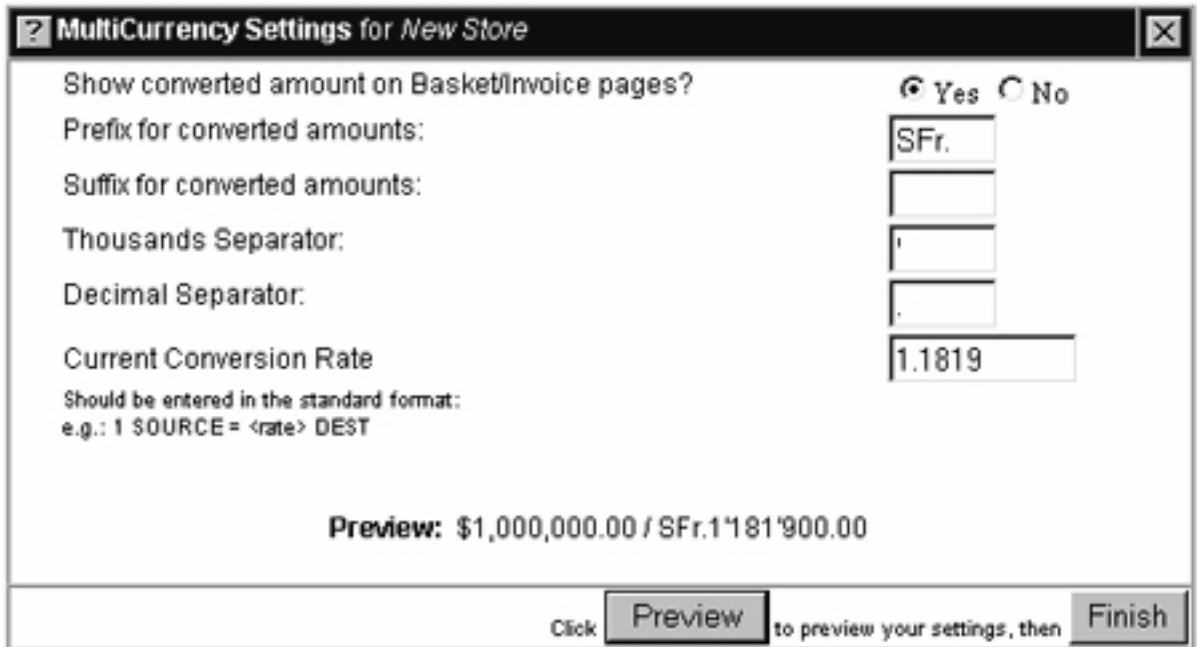
Click **Preview** to preview your settings, then **Finish**

FIGURE 50. MultiCurrency Settings

1. From the Merchant Administration menu, click Multi-Currency. The information that appears is from the Currency Format you selected when you entered Company Information.
2. If you want the converted currency to appear when a customer views their shopping cart and when they checkout, click the 'Yes' radio button. If you click 'Yes' your country's currency will be shown next to the converted currency. To see an example of what a checkout page will look like with the converted currency turned on, see figure 52.
3. Optional. In the Prefix text box you can enter anything you want to appear before the price. Depending on the currency, some things you might enter are \$, Kr, or fl. You could also enter EUR for Euro.
4. Optional. In the Suffix text box you can enter anything you want to appear after the price. Depending on the currency, some things you might enter are F, \$, DM, or Pts.
5. Enter the symbol that will separate a whole number per thousands in the Thousands Separator text box. For example, if you enter { . } and the whole number is 5000, it will appear as { 5.000 }. If the currency doesn't use a separator, leave the text box empty.
6. In the Decimal Separator text box, enter the appropriate symbol. If the currency doesn't use a decimal separator, leave the text box empty.

7. In the Current Conversion Rate text box, enter the conversion rate.
8. Click Preview to view how your settings will appear.
9. Click Finish to save.

Figure 51 shows the settings used to convert Canadian dollars to Swiss francs.



The image shows a dialog box titled "MultiCurrency Settings for New Store". It contains several settings for currency conversion. The "Show converted amount on Basket/Invoice pages?" option is selected with the "Yes" radio button. The "Prefix for converted amounts:" is set to "SFr.". The "Suffix for converted amounts:" is empty. The "Thousands Separator:" is set to a comma. The "Decimal Separator:" is set to a period. The "Current Conversion Rate" is set to "1.1819". Below these settings, there is a note: "Should be entered in the standard format: e.g.: 1 \$SOURCE = <rate> DEST". At the bottom of the dialog, there is a "Preview" button and a "Finish" button. A "Click" label is next to the "Preview" button, and a "to preview your settings, then" label is next to the "Finish" button. The preview text at the bottom of the dialog reads: "Preview: \$1,000,000.00 / SFr.1'181'900.00".

Show converted amount on Basket/Invoice pages?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Prefix for converted amounts:	SFr.
Suffix for converted amounts:	
Thousands Separator:	,
Decimal Separator:	.
Current Conversion Rate	1.1819
Should be entered in the standard format: e.g.: 1 \$SOURCE = <rate> DEST	
Preview: \$1,000,000.00 / SFr.1'181'900.00	
Click	Preview to preview your settings, then Finish

FIGURE 51. MultiCurrency Settings for Swiss Francs

Figure 52 shows an example of the Shopping Basket page a customer will see when they add an item to their basket. The price is displayed in Canadian dollars and Swiss francs.

Contents of shopping basket					
SKU	Item in Basket	Qty.	Price	Ext. Price	Remove
	<u>100 Tips for Manager</u>	<input type="text" value="1"/>	\$45.00 / SFr.53.19	\$45.00 / SFr.53.19	<input type="checkbox"/>
Subtotal:				\$45.00 / SFr.53.19	
<div><input type="button" value="Keep shopping"/> <input type="button" value="Cancel"/> <input type="button" value="Recalculate"/> <input type="button" value="Checkout"/></div>					

FIGURE 52. Contents of Shopping Basket

Figure 52 shows an item for \$45.00 Canadian dollars. Multi-currency automatically converts the price to show the amount in Swiss francs using the conversion rate that was entered in the Current Conversion Rate text box.

To turn off multi-currency conversion:

1. From the Merchant Administration menu, click Multiple Currency.
2. Select No to keep the converted currency from showing up on the Shopping Basket and Checkout pages. If you want to display the converted currency on other pages besides the Shopping Basket and Checkout pages, you can enable the appropriate wizard option(s) such as prdwiz01, prdwiz02, grpwiz01, grpwiz02, webwiz007, etc.
3. Click Finish to save.

This chapter contains information on setting up shipping methods. Detailed instructions for each shipping class are described separately.

AbleShipper™ is a custom ColdFusion Tag written for automatic and accurate calculation of UPS shipping charges for domestic use only. AbleShipper can be enabled by the system administrator and customized by the merchant.

Shipping classes

There are six types of shipping classes available. You and your system administrator should have already established the shipping class for your store. Once the shipping class has been set, you can begin customization of your shipping methods and rates (i.e. Federal Express, UPS, Postal, etc.).

- **Class A:** Calculates shipping using a flat fee.
- **Class B:** Calculates shipping using a flat fee plus a weight fee.
- **Class C:** No shipping charges applied or shipping as a product option.
- **Class D:** Calculates shipping based on the total order amount.
- **Class E:** Calculates shipping based on a percentage of total order.
- **Class F:** Calculates shipping based on the total weight.

If at some point in the future you decide to change your shipping class, you will need to contact your system administrator. If a different shipping class is selected, you will need to modify your shipping methods to correspond.

You can also have your system administrator enable international shipping. This gives you the ability to setup different shipping methods per country.

AbleShipper can also be enabled by your system administrator for automatic and accurate calculation of UPS shipping charges for domestic use only. If enabled, a Configure AbleShipper button will be available from the Shipping Methods page. For more information on AbleShipper, see appendix A “AbleShipper”.

In some states shipping charges are taxable. This can be easily set when you add tax rates for your store. For more information, see chapter 9 “Tax Rates”.

Class A - flat fee

This shipping class uses a simple flat fee. You can setup custom shipping methods, attach a price to each, and apply it to one or multiple countries. If your customer's shipping country is the same as your selection, they will select from your list of shipping methods. The shipping charge will then be added to the total order amount.

Shipping Methods for <i>Example Store</i>	
Shipping Method - Class 'A', Flat Fee	Base Fee
<u>Federal Express, 2 day</u>	\$10.00
<u>Federal Express, Next Day</u>	\$20.00
<u>UPS, Blue</u>	\$5.75
<u>UPS, Ground</u>	\$3.50
<u>UPS, Red</u>	\$12.00
<u>US Postal Service, Express Mail</u>	\$15.00
<u>US Postal Service, Priority</u>	\$3.00
Add Shipping Method	

FIGURE 53. Class 'A' Shipping Method

To add a class A shipping method:

1. From the Merchant Menu, click the Shipping image.
2. From the Shipping Method page, click the Add Shipping Method button.
3. Enter your custom shipping method name into the first field (i.e. Federal Express, 2 day).
4. Enter a base rate into the second field. This is the amount added to a customer's total order.
5. If International is enabled, select any additional countries that would use this shipping rate.
6. Click the Update button to return to the Shipping Method page and view your addition.
7. Repeat as necessary until all shipping methods are entered.

You can edit a shipping method by clicking on the linked name. From the next page, make your changes and click Update

You can delete a shipping method by clicking on the linked name. From the next page, click the Delete button.

Class B - flat fee plus weight fee

This shipping class uses a base fee plus a weight fee. Add your custom shipping method names, attach a price and weight rate to each, and apply it to one or multiple countries. If your customer's shipping country is the same as your selection, they will select from your list of shipping methods.

The shipping rate will be calculated by multiplying your weight fee by the product weight and adding the base fee. The total shipping charges are pre-calculated on the products in your customer's basket. They can preview the true shipping costs and make a selection at checkout.

In order for the weight fees to be calculated, your products must have a weight attached. This can be accomplished through the Product Editing page. You can use any unit of measure such as pounds (lbs.), ounces (oz.), kilograms (kg.), etc. as long as you consistently apply the same unit of measure for every product.

Shipping Methods for <i>Example Store</i>			
Shipping Method - Class 'B', Flat Fee plus Weight Fee	Base Fee	Weight Fee	
<u>Federal Express, 2 day</u>	\$10.00	\$0.75	
<u>Federal Express, Next Day</u>	\$20.00	\$0.35	
<u>UPS, Blue</u>	\$5.75	\$0.15	
<u>UPS, Ground</u>	\$3.50	\$0.00	
<u>UPS, Red</u>	\$12.00	\$0.50	
<u>US Postal Service, Express Mail</u>	\$15.00	\$0.00	
<u>US Postal Service, Priority</u>	\$3.00	\$0.00	
		Add Shipping Method	

FIGURE 54. Class 'B' Shipping Method

To add a class B shipping method:

1. From the Merchant Menu, click the Shipping image.
2. From the Shipping Method page, click the Add Shipping Method button.
3. Enter your custom shipping method name into the first field (i.e. Federal Express, 2 day).
4. Enter a base rate into the second field. This is added to the weight rate if applicable.
5. Enter a weight rate into the third field (Optional). This is multiplied by your product's weight.
6. If International is enabled, select any additional countries that would use this shipping rate.
7. Click the Update button to return to the Shipping Method page and view your addition.
8. Repeat as necessary until all shipping methods are entered.

You can edit a shipping method by clicking on the linked name. From the next page, make your changes and click Update.

You can delete a shipping method by clicking on the linked name. From the next page, click the Delete button.

Class C - none

If your store uses this shipping class, the customer will not have the option of selecting a shipping method at checkout. However, if you have unusual shipping charges that vary per product, this would be a good shipping class to have for your store. You can use the product options to individually attach shipping charges on a per product basis. The customer would select the shipping charge from your product options before adding the item to their basket.

Class D - matrix by price

This shipping class is based on the total order amount. You can setup a matrix range with a base fee for each. As shown in the example below, a base fee corresponds to a price range. If the customer's total order amount falls within your designated range, the corresponding shipping charge is available for selection. For each shipping method name, setup a matrix range starting with 0 dollars and ending with the highest dollar amount possible for any one order.

Shipping Methods for Example Store			
Shipping Method - Class 'D', Matrix based on price range	Base Fee	Low Matrix	High Matrix
<u>Federal Express</u>	\$3.00	\$0.00	\$10.00
<u>Federal Express</u>	\$5.00	\$10.01	\$25.00
<u>Federal Express</u>	\$8.50	\$25.01	\$50.00
<u>Federal Express</u>	\$12.00	\$50.01	\$100.00
<u>Federal Express</u>	\$20.00	\$100.01	\$500.00
<u>Federal Express</u>	\$35.00	\$500.01	\$2,000.00
Add Shipping Method			

FIGURE 55. Class 'D' Shipping Method

To add a class D shipping method:

1. From the Merchant Menu, click the Shipping image.
2. From the Shipping Method page, click the Add Shipping Method button.

3. Enter your custom shipping method name into the first field (i.e. UPS Ground).
4. Enter a dollar amount to be added to each order with the designated price range.
5. Enter a dollar amount for the low end of a price range.
6. Enter a dollar amount for the high end of a price range.
7. If International is enabled, select any additional countries that would use this shipping rate.
8. Click the Update button to return to the Shipping Method page and view your addition.
9. Repeat as necessary until all ranges for this shipping method are entered.
10. Repeat steps 1 through 9 for each shipping method name.

?

Add Shipping Method for *Example Store*

✕

Shipping Method Name: Required

UPS Ground

Enter a common shipping method name for each matrix range used.
(I.E. Federal Express, \$0 to \$10.00 add \$3 shipping)
(I.E. Federal Express, \$10.01 to \$25.00 add \$5 shipping, etc.)

Base Fee:

3.00

Enter a monetary amount to be added to each order within the designated price range.

Matrix Low:

0.00

Enter a monetary amount for the low end of a price range.

Matrix High:

20.00

Enter a monetary amount for the high end of a price range.

Select all countries that use this shipping method:

United States

Afghanistan

Albania

Algeria

Andorra

Angola

Anguilla

Antigua and Barbuda

Argentina

Armenia

Aruba

Use the 'CTRL' key and click to select multiple.

Update

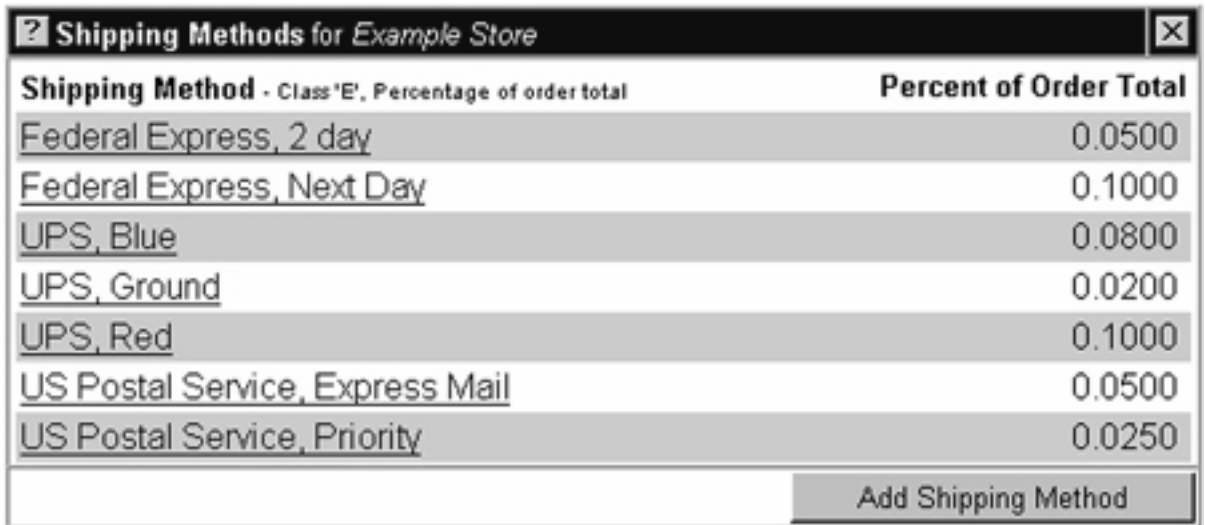
FIGURE 56. Add Shipping Method

You can edit a shipping method by clicking on the linked name. From the next page, make your changes and click Update.

You can delete a shipping method by clicking on the linked name. From the next page, click the Delete button.

Class E - percent of order

This shipping class uses a simple percentage of the customer's total order. You can setup custom shipping method names and attach a percent to each. The shipping rate will be calculated by multiplying your percentage by the total order amount.



Shipping Method - Class 'E', Percentage of order total	Percent of Order Total
Federal Express, 2 day	0.0500
Federal Express, Next Day	0.1000
UPS, Blue	0.0800
UPS, Ground	0.0200
UPS, Red	0.1000
US Postal Service, Express Mail	0.0500
US Postal Service, Priority	0.0250
Add Shipping Method	

FIGURE 57. Class 'E' Shipping Method

To add a class E shipping method:

1. From the Merchant Menu, click the Shipping image.
2. From the Shipping Method page, click the Add Shipping Method button.

3. Enter your custom shipping method name into the first field (i.e. Federal Express, 2 day).
4. Enter a percent in decimal format into the second field.
5. If International is enabled, select any additional countries that would use this shipping rate.
6. Click the Update button to return to the Shipping Method page and view your addition.
7. Repeat as necessary until all shipping methods are entered.

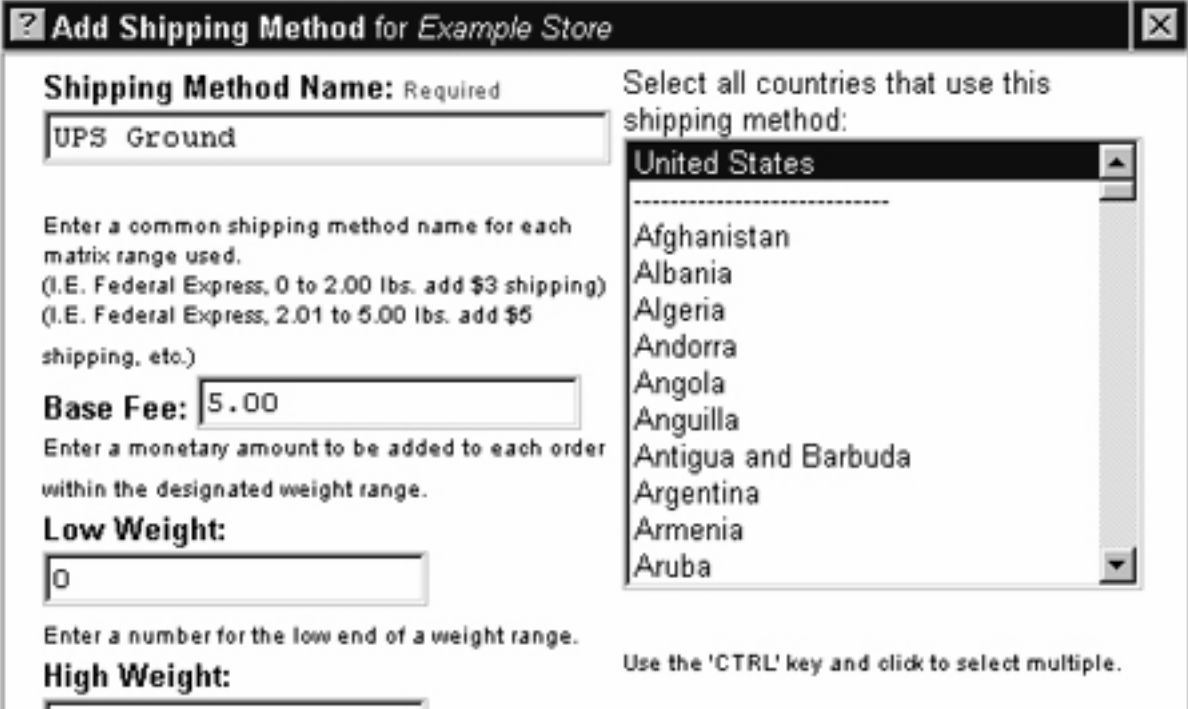
You can edit a shipping method by clicking on the linked name. From the next page, make your changes and click Update.

You can delete a shipping method by clicking on the linked name. From the next page, click the Delete button.

Class F - matrix by weight

This shipping class is almost identical to shipping class 'D', Matrix by price. Instead, the base rate is applied to a weight range. You can setup a matrix range with a base fee for each. As shown in the example below, a base fee corresponds to a weight range. If a customer's total weight of all products in their basket falls within your designated range, the corresponding shipping charge is available for selection. For each shipping method name, setup a matrix range starting with 0 weight and ending with the highest weight possible for any one order.

In order for the weight fees to be calculated, your products must have a weight attached. This can be accomplished through the product editing page. You can use any unit of measure such as pounds (lbs.), ounces (oz.), kilograms (kg.), etc. as long as you consistently apply the same unit of measure for every product.



Add Shipping Method for Example Store

Shipping Method Name: Required

Enter a common shipping method name for each matrix range used.
 (I.E. Federal Express, 0 to 2.00 lbs. add \$3 shipping)
 (I.E. Federal Express, 2.01 to 5.00 lbs. add \$5 shipping, etc.)

Base Fee:

Enter a monetary amount to be added to each order within the designated weight range.

Low Weight:

Enter a number for the low end of a weight range.

High Weight:

Select all countries that use this shipping method:

- United States
-
- Afghanistan
- Albania
- Algeria
- Andorra
- Angola
- Anguilla
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba

Use the 'CTRL' key and click to select multiple.

FIGURE 58. Class 'F' Shipping Method

To add a class F shipping method:

1. From the Merchant Menu, click the Shipping image.
2. From the Shipping Method page, click the Add Shipping Method button.
3. Enter your custom shipping method name into the first field (i.e. UPS Ground).
4. Enter a dollar amount to be added to each order with the designated weight range.
5. Enter a number for the low end of a weight range.
6. Enter a number for the high end of a weight range.
7. If International is enabled, select any additional countries that would use this shipping rate.
8. Click the Update button to return to the Shipping Method page and view your addition.
9. Repeat as necessary until all ranges for this shipping method are entered.
10. Repeat steps 1 through 9 for each shipping method name.

You can edit a shipping method by clicking on the linked name. From the next page, make your changes and click Update.

You can delete a shipping method by clicking on the linked name. From the next page, click the Delete button.

This chapter contains information on setting up taxes. Taxes are divided into two section, standard taxes and advanced taxes. Standard taxes are taxes that apply to an entire country or a country's state or province. Standard taxes will be covered first. Advanced taxes are taxes that apply to a specific product. Advanced taxes will be covered last.

Standard taxes

Your new store will not have any tax rates in effect until you add them. When you click Taxes from the Merchant Menu, you will be taken to the Tax Rates page shown in figure 59.

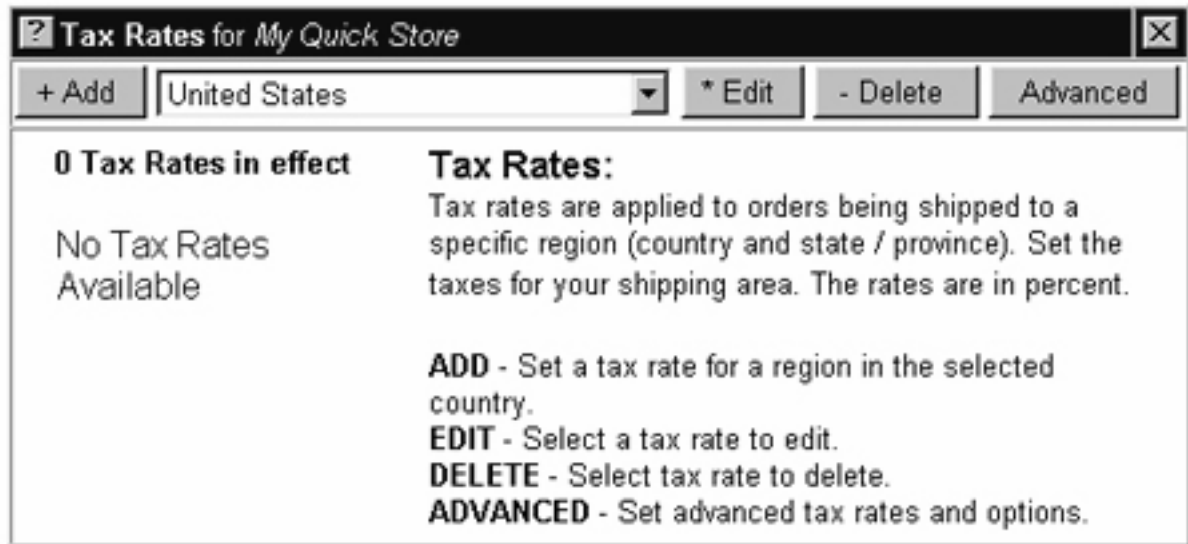
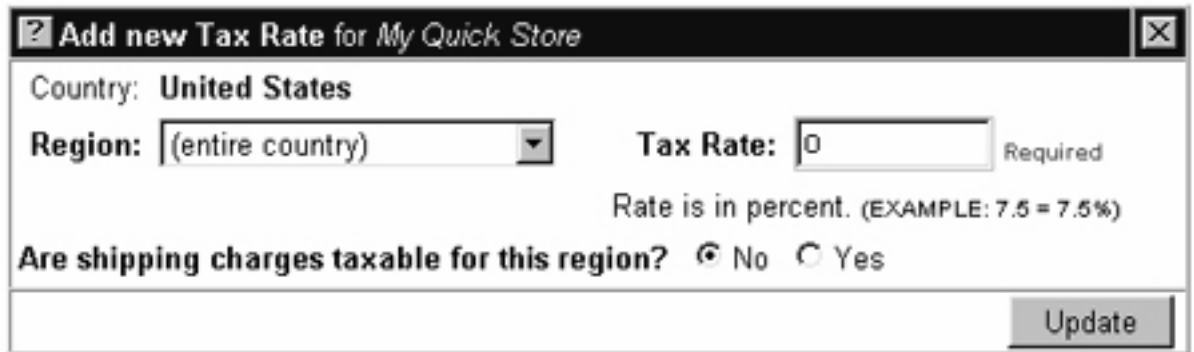


FIGURE 59. Tax Rates

To add a standard tax:

Note: To add a tax to a state / province that isn't listed, you will need to either contact your system administrator, or if you have access to the Admin Menu, go to Manage Regions and add the state / province before adding the tax.

1. From the Merchant Menu, click Taxes.
2. From the drop-down box, select the country that you want to add the tax rate to. If you are going to add a tax to a state or province, select the country that the state or province is located in.
3. Click +Add. This will take you to the Add a New Tax Rate page depicted in figure 60.



Add new Tax Rate for My Quick Store

Country: **United States**

Region: (entire country) Tax Rate: 0 Required

Rate is in percent. (EXAMPLE: 7.5 = 7.5%)

Are shipping charges taxable for this region? ☒ No ☐ Yes

Update

FIGURE 60. Add New Tax Rate

4. From the Region drop-down box, select the state or province that the tax rate will apply to. If the tax is going to be applied to all states or provinces in the country, leave the drop-down box selected as Entire Country.
5. In the Tax Rate text box, enter the tax rate that will be applied to all merchandise.
6. Select Yes if the tax rate will be applied to shipping charges as well as the cost of the merchandise. Select No if the tax rate will only be applied to the cost of the merchandise.
7. Click Update. When you click update, you will be shown a list of all taxes for the selected region. The taxes for states and provinces will be listed in the order the taxes were added.

To edit a standard tax:

1. From the Merchant Menu, click Taxes.
2. From the scroll list, select the tax you want to change.
3. Click *Edit.
4. Make the necessary changes. You can edit the tax rate and / or whether or not shipping charges are taxed.
5. Click Update to save.

To delete a standard tax:

1. From the Merchant Menu, click Taxes.
2. From the drop-down box, select the tax you want to delete.
3. Click -Delete.
4. You will be asked if you are sure you want to delete the tax for the selected state / province. Click Yes to finalize or No to keep the tax.

Advanced taxes

You will want to use the advanced taxes for regions with multiple tax levels (taxes other than the standard country or state and province taxes). Advanced taxes are used when products in your store have specific taxes that need to be applied. For example, many states in the United States have a tax on tobacco products. If your store sells tobacco products, you would need to use an advanced tax so that the tobacco products are taxed appropriately.

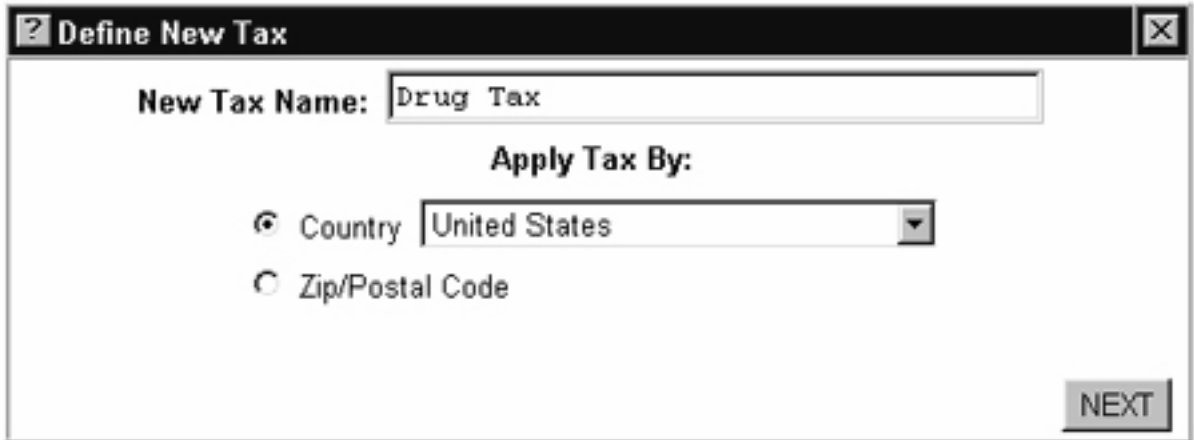
The application of advanced taxes starts at the lowest level (specific product) and if there is a tax that applies to a specific product, any other taxes that might have applied because the product is in another taxable group or category will no longer apply. If you have a tax to be applied to all products in your store (highest level), the only products that will have that tax applied will be products that don't already have another tax applied in a lower level. The one exception to this is a shipping tax. If shipping is taxable, it will apply no matter what other taxes are being applied.

From the advanced tax page, you can create taxes to be applied to all products in your store, all products in a category, all products in a group, or a specific product. Taxes will not compound on each other unless the taxes are at the same level. Taxes at the lowest level will always be applied. The lowest level tax is a tax applied to a specific product while the highest level tax is a tax applied to all products in the store. If a product has a specific product tax and is also in a category where all products in that category will be taxed, only the specific product tax will be applied. A tax will only apply to a product if the product is not already being taxed at a lower level. However, if there are three different taxes applied in a particular level, all three taxes will be applied.

An advanced tax can be applied to an entire county, a state/province, or a postal code. You can add up to three levels for a particular tax. For example, in the United States, the state of Illinois has a 1 percent Drug Tax for both prescription and non-prescription drugs. To create the Drug Tax two levels would be added, one level would be for prescription drugs and the other would be for non-prescription drugs. After the taxes are defined, you would then apply them to the appropriate levels (all products in your store, all products in a category, all products in a group, or to a specific product).

To add an advanced tax:

1. From the Merchant Menu, click Taxes.
2. Click Advanced.
3. Click +Add. When you click +Add you will be taken to a page similar to figure 61.



Define New Tax

New Tax Name:

Apply Tax By:

☒ Country

☐ Zip/Postal Code

NEXT

FIGURE 61. Define New Tax

4. Enter what type of tax you are applying in the New Tax Name text box.
5. Do one of two things:
 - If your tax is going to be applied by a country or state/province, select the Country radio button and select the country from the drop-down box.
 - If your tax is going to be applied by a postal code, select the Zip/Postal Code radio button.
6. Click Next. When you click Next you will be shown a page similar to figure 62 (the text in the Description text box will appear on the invoice next to the tax charged). If you are applying the tax by postal code, you will need to specify the postal code rather than the region.

Define New Tax *Drug Tax* for United States

Tax Name: Drug Tax

Choose a region: Illinois

Tax Level 1

Description: Prescription Drugs Rate: 1.0

Tax Level 2

Description: Non-prescription Dru Rate: 1.0

Tax Level 3

Description: Rate:

All rates are in percent. (EXAMPLE: 7.5 = 7.5%)

Calculate by: ☒ Shipping Address ☐ Billing Address

FINISH

FIGURE 62. Define New Tax

7. Do one of two things:
 - If you are going to apply the tax by state/province select the applicable state/province from the drop-down box. If you want the tax to apply to the entire country, leave the drop-down box selected at Entire Country.
 - If you are going to apply the tax by postal code, enter the applicable postal code in the Zip/Postal Code text box.
8. You can enter up to three levels for the new tax. Enter the name of the product tax in the Description text box. The text you enter here will appear on the invoices next to the tax amount, so be sure to enter an appropriate tax description so that your customers will know exactly what they are being taxed for.
9. Enter the tax rate in the Rate text box.

10. From the Calculate By radio buttons, select Shipping Address if you want the tax to be applied only if the merchandise is being shipped to the applicable area. Select Billing Address if you want the tax to be applied if the billing address is in the applicable area.
11. Click Finish. When you click Finish you will be taken to a page depicted in figure 63.

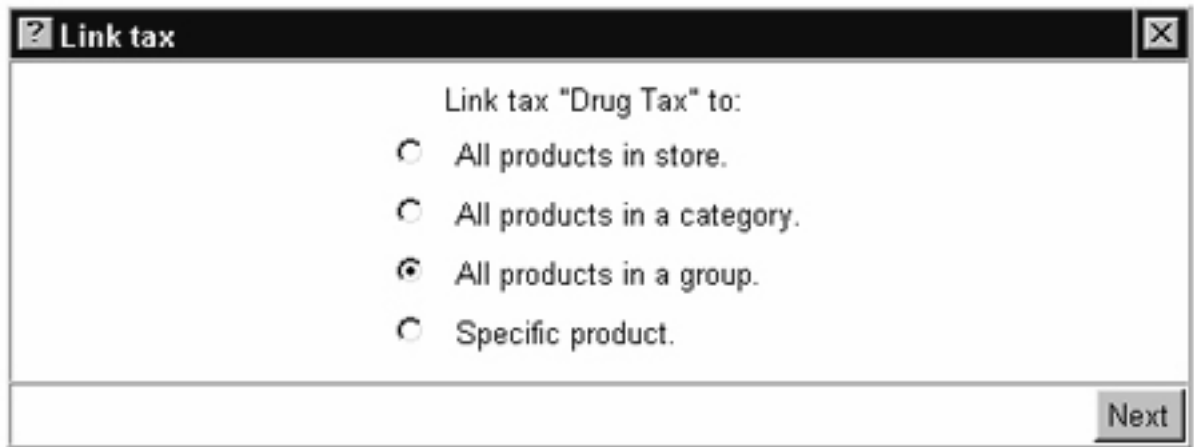


FIGURE 63. Link Tax

12. From the Link Tax page, select where the tax is going to be applied. You can apply the tax to every product in your store. You can apply the tax to all products in a category or to all products in a group, or you can apply the tax to just a single product in your store.
13. Click Next.
14. Do one of four things:
 - If you selected All Products in Store, select where the tax will be applied. There may only be one selection depending on the number of levels you created. Select whether to apply the tax to the product only, the product and shipping, or shipping only. Click Finish.
 - If you selected All Products in a Category, select the category where the tax will be applied. Select the tax level(s) that will apply. There may only be one selection depending on the number of levels you created. Click Finish.
 - If you selected All Products in a Group, select the category that the group is in and click Next. Select the group where the tax will be applied. Select the tax level(s) that will apply. There may only be one selection depending on the number of levels you created. Click Finish.

- If you selected Specific Product, select the category that the group is in and click Next. Select the group that the product is in and click Next. Select the tax level(s) that will apply. There may only be one depending on the number of levels you created. Click Finish.

To edit an advanced tax:

Note: *If you want to change where the tax is being applied or linked to, see “To apply a current tax to other products.”*

1. From the Merchant Menu, click Taxes.
2. Click Advanced.
3. Select the tax from the Tax Defined scroll list.
4. Click *Edit. This will take you to the Edit Tax page. From here, you can change the state/province that the tax applies to. You can add, edit, or remove tax levels and change the tax rate, and you can change whether the tax is calculated by the shipping or billing address.
5. Make the necessary changes and click Finish.

To delete an advanced tax:

1. From the Merchant Menu, click Taxes.
2. Click Advanced.
3. Select the tax from the Tax Defined scroll list.
4. Click -Delete.
5. You will be asked if you are sure you want to delete the selected tax. Click OK to finalize or Cancel if you change your mind.

To view an advanced tax:

1. From the Merchant Menu, click Taxes.
2. Click Advanced.
3. Select the tax from the Tax Defined scroll list.
4. Click >>Details. This takes you to the View Tax page where you can see how the tax is being applied. From the View Tax page, you can apply the tax to other products and/or shipping, you can change where the tax is being applied, or you can delete the tax all together.

To apply a current tax to other products:

1. From the Merchant Menu, click Taxes.

2. Click Advanced.
3. Select the tax from the Tax Defined scroll list.
4. Click >>Details. When you click >>Details, you will be taken to a page similar to figure 64.

View Tax

Tax "Drug Tax" applied to all products in group "Perscription".

Tax Name: Drug Tax

Tax Type: By Region:
United States (Illinois)

Tax Levels: Perscription Drugs (1.0%)
Non-perscription Drugs (1.0%)

Calculate by: Shipping Address

Currently Linked To:

Delete	Description	Level(s)	Products	Shipping
<input type="checkbox"/>	All Products In Group "Non-prescription "	Non-perscription Drugs	X	
<input type="checkbox"/>	All Products In Group "Perscription"	Perscription Drugs	X	

Add Link

Delete

FIGURE 64. View Tax

5. Click Add Link.
6. Do one of four things:

- If you selected All Products in Store, select the tax level that will apply. There may only be one depending on the number of levels you created. Select if you want to apply the tax to just the product, the product and shipping, or just shipping. Click Finish.
- If you selected All Products in a Category, select the category you want the tax to apply to. Select the tax level(s) that will apply. There may only be one depending on the number of levels you created. Click Finish.
- If you selected All Products in a Group, select the category that the group is in and click Next. Select the group you want the tax to apply. Select the tax level(s) that will apply. There may only be one depending on the number of levels you created. Click Finish.
- If you selected Specific Product, select the category that the group is in and click Next. Select the group that the product is in and click Next. Select the tax level(s) that will apply. There may only be one depending on the number of levels you created. Click Finish.

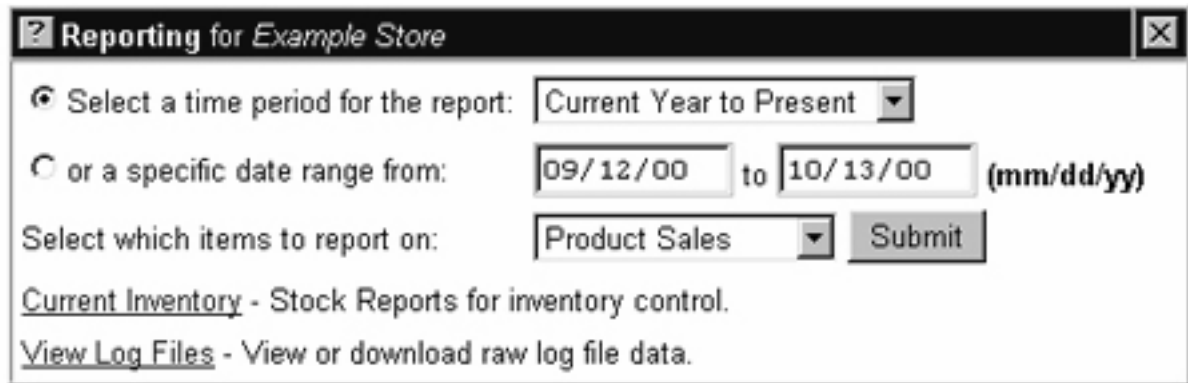
To delete where a tax is being applied:

1. From the Merchant Menu, click Taxes.
2. Click Advanced.
3. Select the tax from the Tax Defined scroll list.
4. Click >>Details.
5. Select the corresponding delete for the tax link you no longer want applied.
6. Click Delete.
7. You will be asked if you are sure you want to delete the selected tax link. Click OK to finalize or Cancel if you change your mind.

This chapter contains information on reports available with AbleCommerce. A variety of reports can be used to give detailed information on product sales, taxes, shipping, users, and inventory. The AbleCommerce log files can be easily setup to be used with log analyzers for real-time reporting.

Reporting range

To run a report, click the Reports image from the Merchant Menu. You can either select from the pre-defined report periods or type in a specific date range. Select a report from the list available and click Submit. The Current Inventory link and View Log Files link will only be available if you have enabled them through store settings.



Reporting for Example Store

☒ Select a time period for the report: Current Year to Present

☐ or a specific date range from: 09/12/00 to 10/13/00 (mm/dd/yy)

Select which items to report on: Product Sales Submit

[Current Inventory](#) - Stock Reports for inventory control.

[View Log Files](#) - View or download raw log file data.

FIGURE 65. Sales Total

Product sales

A Product Sales report will give you information on all products such as quantities sold and sales totals. You can further define your product report by selecting a Category or Group for a listing of products within. By selecting a registered user, you can see the products sold to specific customers.

Product Sales Report for Example Store

Filter your report data by selecting a Category or Group. You can also filter by selecting a Registered User with or without a Category or Group selected. Reset the form (nothing selected) for a full Product report within time period selected.

Categories:

Whole Bean Coffee
Biscotti
Gift Baskets

Groups:

Whole Bean Coffee
Biscotti
Gift Baskets

Registered Users:

Mike Smith

Time Period: **01-Jan-00 to 17-Oct-00**

Check this box to only show deleted products ☐

Reset View Report View a Printable Report

FIGURE 66. Product Sales Report

To report product sales:

1. From the Merchant Menu, click the Reports image.
2. From the Reporting page, select a time period from the list available or type in a specific date range.
3. Select 'Product Sales' from the list available and click the Submit button.
4. Select a Category or Group if you want to see only products for that particular area.
5. Select a Registered User if you want to see only products sold to that person.
6. Click the View Report button or View a Printable Report button to report your product sales.
7. Clicking the Reset button will deselect everything, generating a report on all products.
8. If you check the box next to only show deleted products, the report will show only those products that have been sold and then later deleted.

Product Sales Report for <i>Example Store</i>			
Example Store Product Sales Report 01-Jan-00 to 17-Oct-00			
SKU	Product Title	Quantity	Sales Total
523468	Sumatra Coffee	10	\$200.00
568421	Italian Coffee	1	\$20.00
531548	Almond Biscotti	25	\$250.00
568425	Chocolate Covered Almond Biscotti	5	\$50.00
Total Product Sales:			\$520.00

FIGURE 67. Example Product Sales Report

Sale totals

A Sale Totals report will give you dollar figures for gross product sales, sales tax, shipping charges, or any combination thereof.

Product Sales Report for <i>Example Store</i>			
Example Store Product Sales Report 01-Jan-00 to 17-Oct-00			
SKU	Product Title	Quantity	Sales Total
523468	Sumatra Coffee	10	\$200.00
568421	Italian Coffee	1	\$20.00
531548	Almond Biscotti	25	\$250.00
568425	Chocolate Covered Almond Biscotti	5	\$50.00
Total Product Sales:			\$520.00

FIGURE 68. Sale Totals Report**To report sale totals:**

1. From the Merchant Menu, click the Reports image.
2. From the Reporting page, select a time period from the list available or type in a specific date range.
3. Select 'Sale Totals' from the list available and click the Submit button.
4. The time period you selected will be carried over to the next page. You may select Product Sales, Sales Tax, Shipping Charges together or separately by holding down the Control key as you make your selection(s).
5. Click the Calculate button to view the total amount.

Sales tax

A Sales Tax report will give you a list of states that have been assigned a tax rate for which tax has been collected. The assigned percentage rate is shown with a total tax collected.

Sales Tax Report for <i>New Company</i>			
New Company			
Sales Tax Report			
01 Jan 00 to 17 Oct 00			
Country	Province	Percentage Rate	Total Tax
United States	Arizona	Arizona Sales Tax (5.0%)	\$7.00
United States	Washington	Washington Sales Tax (6.5%)	\$1.30
Total Sales Tax:			\$8.30

FIGURE 69. Sales Tax Report

To report sales tax:

1. From the Merchant Menu, click the Reports image.
2. From the Reporting page, select a time period from the list available or type in a specific date range.
3. Select 'Sales Tax' from the list available and click the Submit button.

Your Sales Tax report for the time period you selected will be displayed.

Shipping charges

A Shipping Charges report will give you a list of shipping methods that have been used for all completed orders. Each shipping method name is shown with total freight charges.

Shipping Report for <i>Example Store</i>	
Example Store Shipping Report 01-Jan-98 to 05-Sep-98	
Shipping Method	Freight Charges
Test Method	\$10.00
UPS-Ground Commercial	\$107.65
UPS-Ground Residential	\$115.36
UPS-Next Day Air Saver	\$13.05
UPS-Second Day Air	\$24.30
UPS-Three Day Select	\$35.00
Total Freight Charges:	\$305.36

FIGURE 70. Shipping Charges Report

To report shipping charges:

1. From the Merchant Menu, click the Reports image.
2. From the Reporting page, select a time period from the list available or type in a specific date range.
3. Select 'Shipping Charges' from the list available and click the Submit button.
4. Your Shipping report for the time period you selected will be displayed.

User statistics

The User Statistics report will display all users that have accessed any page in your store. A report displays the user's I.P. address, browser type, and first and last visited dates. If the user completed a checkout, the registered user's first and last name will be displayed.

Example Store User Statistics Report 01-Jan-98 to 05-Sep-98				
IP Address	Browser Type	First Visit	Last Visit	Users
Sort by IP	Sort by Browser	Sort by First Visit	Sort by Last Visit	Sort by User
127.0.0.1	Mozilla/4.0 (compatible; MSIE 4.01; Windows 95)	26-Aug-98, 09:40 AM	26-Aug-98, 09:40 AM	Jane Doe
127.0.0.1	Mozilla/4.05 [en] (Win95; I)	26-Aug-98, 12:13 PM	26-Aug-98, 12:13 PM	
127.0.0.1	Mozilla/4.0 (compatible; MSIE 4.01; Windows 95)	26-Aug-98, 09:41 AM	27-Aug-98, 11:58 AM	Jane Doe
127.0.0.1	Mozilla/4.05 [en] (Win95; I)	26-Aug-98, 09:38 AM	04-Sep-98, 02:00 PM	Katie Randolph
Records Returned: 4				

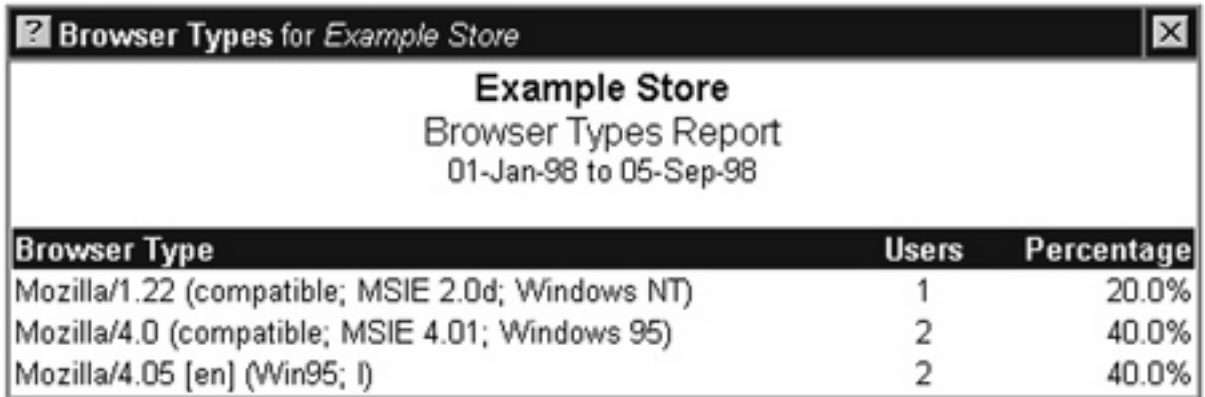
FIGURE 71. User Statistics Report

To report user statistics:

1. From the Merchant Menu, click the Reports image.
2. From the Reporting page, select a time period from the list available or type in a specific date range.
3. Select 'User Statistics' from the list available and click the Submit button.
4. Your User Statistics report for the time period you selected will be displayed.
5. By clicking on the link below each column heading, you can sort the list by that field.

Browser types

The Browser Types report will display the different types of browsers being used to view your store, the number of users for each browser type, and the overall percentage.



Browser Type	Users	Percentage
Mozilla/1.22 (compatible; MSIE 2.0d; Windows NT)	1	20.0%
Mozilla/4.0 (compatible; MSIE 4.01; Windows 95)	2	40.0%
Mozilla/4.05 [en] (Win95; I)	2	40.0%

FIGURE 72. Browser Types Report

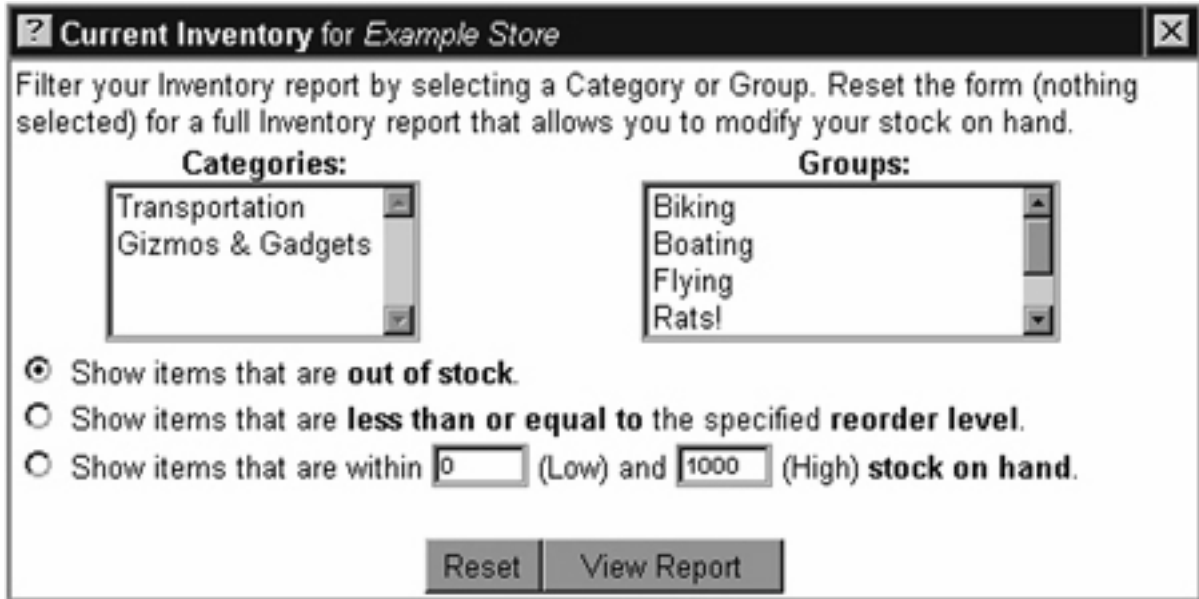
To report browser types:

1. From the Merchant Menu, click the Reports image.
2. From the Reporting page, select a time period from the list available or type in a specific date range.
3. Select 'Browser Types' from the list available and click the Submit button.

Your Browser Types report for the time period you selected will be displayed.

Current inventory

If you are using the Inventory Management feature, then you may access the link from the Reporting page named Current Inventory. From here, you can view reports on your inventory items that are out of stock, less than or equal to the reorder level, or within a predefined stock quantity. Additional filters are available for products within a specific Category or Group.



Current Inventory for Example Store

Filter your Inventory report by selecting a Category or Group. Reset the form (nothing selected) for a full Inventory report that allows you to modify your stock on hand.

Categories:

- Transportation
- Gizmos & Gadgets

Groups:

- Biking
- Boating
- Flying
- Rats!

☒ Show items that are **out of stock**.

☐ Show items that are **less than or equal to the specified reorder level**.

☐ Show items that are within (Low) and (High) **stock on hand**.

FIGURE 73. Current Inventory Report

To report current inventory:

1. From the Merchant Menu, click the Reports image.
2. If Inventory Management is enabled, you will be able to click the Current Inventory link.
3. Select a Category or Group to filter products or leave none selected for all products.
4. Select either an out of stock report, low quantity stock report, or a range of stock quantities.
5. After making your selections, click the View Report button.

In Stock	Reorder	Price	Retail	SKU	Product Title	Active
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="\$399.0"/>	<input type="text" value="\$499.0"/>	1234	Mountain Bike	<input checked="" type="checkbox"/>
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	4321	Paper	<input checked="" type="checkbox"/>
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	5555	Scissors	<input checked="" type="checkbox"/>

FIGURE 74. Current Inventory Report

Your products will be listed with editable fields that can be used to update stock quantities, change reorder levels, price, retail price, or deactivate from viewing. A link is provided to the Product Detail page as well. You can make any necessary changes and click the Update Instock button.

View log files

If your system administrator has made the raw log files available to you, then you will have an option to view these files. The log files can be created on a daily, weekly, or monthly basis. All log files for your store will be available from the selection list. You may decide to download the files and use a sophisticated reporting program such as WebTrends.

Select log file: and font size for viewing.

When downloading log files Netscape incorrectly add '.exe' to the end of the log filename, change the file extension to '.log' or '.bdf'.

FIGURE 75. View Log Files

When downloading log files, Netscape incorrectly adds '.exe.' to the end of the log file name. You will need to change the file extension to '.log' or '.txt'.

Log file reporting

This example of setting up log file reporting is using WebTrends Log Analyzer. Before beginning, you will need to have a current version of WebTrends Log Analyzer and AbleCommerce 2.0 or later installed and running.

Confirm that logging is enabled through the AbleCommerce Store Settings menu for each store that you want reporting on. You can have AbleCommerce generate log files on a daily, weekly, or monthly basis.

A standard NCSA logging format is used to generate the types of log files located in the following default directory:

C:\Program Files\AbleCommerce Builder\acb\logs\

TABLE 2. Naming Convention: 6_m0898.log

Store ID	Time Indicator	Month	Year	Extension
6	m=monthly	08	98	log
	w=weekly			
	d=daily			

To create a new log profile:

1. Begin WebTrends Log Analyzer.
2. Click the NEW icon to create a new profile.
3. Enter a description for the profile such as 'ABC Computer Storefront Log File'.
4. Enter the exact file path to the log file generated by AbleCommerce. If you want real-time reporting, point this location to the server running AbleCommerce and to the default directory for the log files as shown above. You may use wildcards (*) in the file name to span across multiple files. For example, if you entered c:\program files\ablecommerce builder\logs\6_*.log, then any reports would look at all log files generated by store ID 6. **Note:** *If you do not plan to use real-time reporting, then it is recommended to copy the log file to a local machine running WebTrends for best performance.*
5. Leave 'Auto-Detect Log File Type' selected and click NEXT to continue.

6. Select the Domain Name/IP Resolution mode for this log file. Quick mode is recommended for fastest performance, however if you want to have WebTrends lookup any unresolved IP address and try to convert it to a domain, select Resolve mode. This may dramatically slow down the reports.
7. Enter the URL for your store's home page. Hint: You can go to the Company page from the AbleCommerce Merchant Menu and enter a static URL for the home page of your website, but make sure you put up a link to the default home page for your store. Doing this will give you more accurate results in the reports generated for home page hits. Click Next to continue.
8. You can setup filters for your report in the same way email filters are used. For this profile we are going to Include Everything. Refer to WebTrends help for setting up and applying new filters. Click Next to continue.
9. If you are going to run your reports in real-time, check the boxes on this page to Collect Data, Analysis Log Files, and Generate Reports in background. Select the frequency of the reports such as every 1 day, or every 1 hour, or every 1 week. Select the location where the report will be saved and the file name. For this example, we used c:\program files\acb\reports\August98.htm.
10. Click Finish to complete setup of a new profile.

To create and customize a report:

1. Select the new profile you just created and click the REPORT icon to create a new report.
2. The memorized report name will probably default to << None Selected >>. The Report Range will usually be 'All of Log' if you are planning to use real-time reporting or if the log file already has the correct date and time range. You can select exact dates and times for your report here. Click the FORMAT tab to continue.
3. Select from the list the type of report format such as HTML, Word, Excel, etc. Click the SAVEAS/MAILTO tab to continue.
4. Select the location and file name you wish to save for this report or you can send the report via email to a specified address. Click the STYLE tab to continue.
5. Enter a report title such as ABC Computer Storefront Reports. Select the language of the report, such as English. Select the report style from the list available. For this example, we will use (Default-Printable HTML Reports). Click the CONTENT tab to continue.
6. From the content window you may select individual components to report on. Most items are displayed in table or graph format. Check the items that you want to include in this report. **Note:** *If the data is not available from the log file, the data will not be displayed for that particular report item.*
7. Click the MEMORIZE button at any time to save the report name. Enter a description of the report and click SAVE. The new report will be available from the reports area of WebTrends in the selection list.
8. You can click START to immediately run a report or you can click CANCEL to wait for the next scheduled real-time report. The status of real-time reporting is displayed in the lower-right corner of the WebTrends menu.

Real-time Reporting Recommendations:

- Run WebTrends on another system, not on your live web server.
- Leave WebTrends running for real-time reporting.

This chapter contains information on managing your customer comments. There are instructions for modifying your default guest book form, custom reply pages, and automatic email responses.

Managing comments

When you select the wizard option to activate the standard guest book on any of your dynamic pages, your guests will be able to leave a message for you. You can view their message, name, and email from the Comment area of your store. Click the Comments image from the Merchant Menu and any unarchived messages will be available from the Comments page.

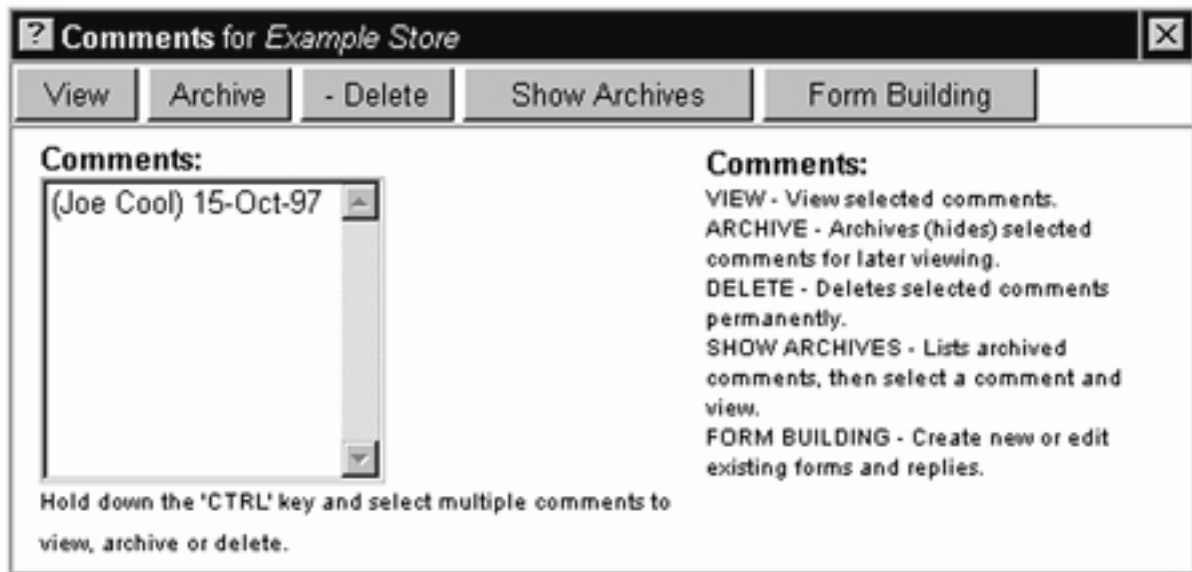


FIGURE 76. Comment Area

To view a comment:

1. Select a comment from the selection box and click the View button.
2. To view multiple comments, hold down the 'CTRL' key while selecting comments and click View.
3. The details of your message(s) are displayed with a link to the email address for a quick reply.

To archive a comment:

1. Select a comment from the selection box and click the Archive button.
2. To archive multiple comments, hold down the 'CTRL' key while selecting and click Archive.
3. The comments are moved from the Comments page to the Archived Comments page.
4. You may also click the Archive button after viewing a selected comment.

To view an archived comment:

1. Click the Show Archives button from the Comments page.
2. Select an archived comment from the selection box and click the View button.

3. To view multiple comments, hold down the 'CTRL' key while selecting and click View.
4. The details of your archived message(s) are displayed.

To delete a comment:

1. Select a comment from the selection box and click the Delete button.
2. To delete multiple comments, hold down the 'CTRL' key while selecting and click Delete.
3. The comments are deleted permanently without a confirmation page.
4. You may also click the Delete button after viewing a selected comment.

<input type="button" value="Archive"/>	<input type="button" value="Delete"/>	User: <u>Joe Cool</u> - Date: 15-Oct-97, 10:14 AM
EMAIL:		<u>cool@coolcats.com</u>
SUBJECT:		Cool Store
COMMENTTYPE:		Request
MESSAGETEXT:		Very cool store, where can I get one?

FIGURE 77. Viewing a Comment Example

Form building

You can use your own custom HTML to design complex forms, custom reply pages, and automatic email responses. Your store comes with a default guest book form, default reply page, and an unattached automated email response. If you would like to modify your default pages, click the Form Building button from the Comment page.

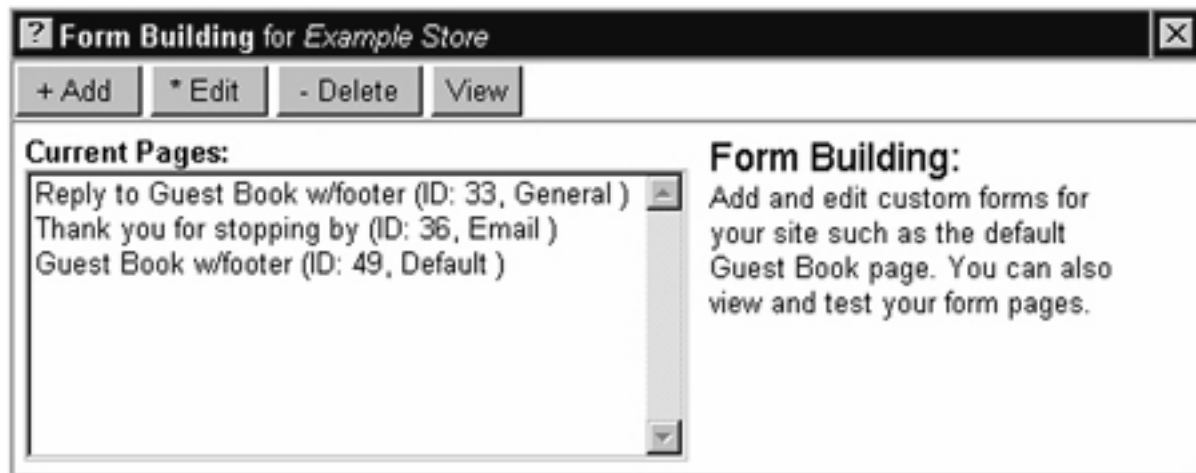


FIGURE 78. Form Building

There are three types of pages available: Default, General, and Email. Any type of page is completely customizable with knowledge of basic HTML or forms. By creating a unique style called 'Comments', you can include page properties and headers and footers in all of your pages created with FormBuilder.

The Default page is your standard guest book form. When you activate the Guest Book wizard option on one of your dynamic pages, a button becomes available for your guests to leave a message. You may have only one Default page.

A General page can be any custom form or reply to a custom form. There is no limit to the number of General pages that may be created. You can create complex forms with your own custom fields. A General page can also be attached to another page for a custom reply to a user's input.

An Email page is text based and has to be attached to a reply page for an automatic email response to be sent. This feature may not be available to everyone, contact your system administrator for more information.

To test your default guest book:

1. From the Form Building page, select your Default Guest Book form and click the View button.
2. You can fill in the form, submit a message, and view the reply page. If you have an automated email response attached to your reply page and have entered a valid email address, you should be sent an email response. If

this doesn't work, first check your page settings and then see if your system administrator may need to enable the ColdFusion email service.

You may test any page you create in this same manner.

Editing Page (Guest Book w/footer)

Page Type:
Default

Next (Reply) page:
33:Reply to Guest Book w/footer

Email:
newcompany@ablecommerce.com

Subject:
Guest Book w/footer

DEFAULT: This is the default Guest Book form that can be output on any dynamic page. Select the Guest Book option through any wizard editor page.

Attach your custom html reply page or leave 'None' selected for the default page.

Used in the footer of this page and/or an email reply.

Subject line used in the email reply message or Title of a page. Append 'w/footer' to display company contact information and email address.

Click **Update** to make changes, then **View** to see the form.

FIGURE 79. Editing Page (Default)

To edit your default guest book:

1. From the Form Building page, select your Default Guest Book form and click the Edit button.
2. You have the option to change the Page Type, Default, General, or Email Reply. If you change the page type and do not have a Default guest book, it will no longer be a valid wizard option.
3. Select the Next (Reply) page from the selection box. If you have 'None' selected, the default reply page will be used. This is simply your home image from the default Style with a link back to your home page.
4. Enter an Email address that can be used in the footer of this page. If a footer is activated, the company contact information will be used with this email address.
5. Enter a Subject for this page; it will be used in the browser title bar. If you append ' w/footer ' to your Subject line as shown in the above example, your company's contact information and email address will be displayed in the bottom left corner of the page.
6. Design your custom guest book form using the sample page provided.

7. Click Update to make changes, then click View to see the form and test.

Editing Page (Reply to Guest Book w/footer)

Page Type:
General

Next (Reply) page:
None

Email Reply page:
36:Thank you for stopping by

Email:
newcompany@ablecommerce.com

Subject:
Reply to Guest Book w/footer

GENERAL: This is a custom form and is only available if you provide a link to this page. Find and copy the source code at the bottom of this page.

Attach your custom html reply page or leave 'None' selected for the default page.

Leave 'None' selected unless you are currently editing a Reply Page and want to attach an automatic email responder now.

Used in the footer of this page and/or an email reply.

Subject line used in the email reply message or Title of a page. Append 'w/footer' to display company contact information and email address.

Click **Update** to make changes, then **View** to see the form.

FIGURE 80. Editing Page (General)

To edit a general page:

1. From the Form Building page, select a General type of page such as the 'Reply to Guest Book' and click the Edit button.
2. You have the option to change the Page Type to General or Email Reply. If you already have a Default page type in use, this will not be an available selection.
3. If you are currently modifying a reply page, select 'None' for the Next (Reply) page.
4. If you are currently modifying a reply page, select an Email Reply page if you want to have an automated email message sent when this page is used.
5. Enter an Email address that can be used in the footer of this page. If a footer is activated, the company contact information will be used with this email address.

6. Enter a Subject for this page; it will be used in the browser title bar. If you append ' w/footer ' to your Subject line as shown in the above example, your company's contact information and email address will be displayed in the bottom left corner of this page.
7. Design your custom reply page using the sample provided.
8. Click Update to make changes, then View.

FIGURE 81. Editing Page (Email Reply)

To edit an email response:

This feature may not be available to everyone; contact your system administrator for more information.

1. From the Form Building page, select an Email type of page and click the Edit button.
2. You have the option to change the Page Type. Only an Email Reply page may be used for the automatic email response.
3. Enter an email address that will be used in the 'From' field of an email message.
4. Enter a subject for this email message; it will be used in the Subject field of your email message.
5. Click Update to make changes.
6. Close this page and return to the Form Building page.

To assemble a form, reply, and email response:

1. Create a General page type with your form fields for user input. Or you can use the default Guest Book page.

2. Create a General page type with your custom reply to their submission. It's a good idea to provide a link back to your home page.
3. Create a text based Email Reply page.
4. Go back to your initial form and attach your custom reply page. If you leave 'None' selected for the default reply page with your company image and home page reference, you will not be able to attach an automatic email response. Click Update.
5. Go to your custom reply page and attach your Email reply page. Click Update.
6. Return to the first page and click View to test the form, see the reply, and receive an email message.

If you are familiar with HTML, you may decide to create a custom page. You can add unlimited fields to design complex forms without having to add additional database fields. Use the sample form page provided and simply add the custom fields you want to have displayed.

Use the following HTML source code example to add a new field:

```
<INPUT SIZE=40 NAME="MyCustomField">
```

To make your new field required, add the source code example to the bottom of your form.

```
<INPUT TYPE="hidden" NAME="MyCustomField_required" VALUE="You must enter something in this custom field.">
```

When a person completes your form, you will be able to display the results from the Comment page. Each field entry is a separate line item on the message report.

QuickStore Admin is where you keep track of your QuickStore accounts. You will be able to edit credit card information, edit monthly fees, enable a QuickStore to have access to the Merchant Menu, and bill one or all of your QuickStore accounts that are due. QuickStore accounts will be billed on a monthly basis.

When you click QuickStore Admin, you are taken to the QuickStore Accounts page. From the QuickStore Accounts page, you will be able to see how many accounts, if any are due for processing. If there are QuickStore accounts due, you can bill all of them at once, or you can bill one at a time.

By clicking Edit from the QuickStore Accounts page, you will be able to edit the monthly fee that is charged to QuickStore accounts, change the customer's credit card information, and enable a QuickStore to have access to the Merchant Menu. When you click Edit from the QuickStore Accounts page, you will be taken to a page similar to figure 84.



Edit QuickStore Account 'My Quick Store' for New Company

Edit Account for My Quick Store

Fee: 49.95

Name on Card: New User

New Card Number:

Current: 41*1111 (leave blank to keep)

Bank Code:

Card Exp (mm-yy): 9-02

Enable Merchant Menu Link: ☐

Cancel Update

FIGURE 82. Edit QuickStore Account

To change credit card information for a QuickStore account:

Note: For security reasons, once a credit card number has been saved, it will no longer appear in the credit card text box. If you need to view the credit card number, you can check the database.

1. From the Merchant Menu, click QuickStore Admin.
2. From the drop-down box, select the QuickStore account you want to change credit card information for.
3. Click Edit.
4. Make the necessary changes and click Update. You can change the name on the credit card, the credit card number, the bank code, and the card's expiration date.

To change the billing address for a QuickStore account:

1. From the Administrator Menu, click Security Manager.
2. Click User Manager.

3. Search for the user whose information you need to change.
4. Select the user's name from the User scroll box and click Basic Info.
5. Make the necessary changes and click Update.

To change the monthly fee charged to a QuickStore account:

1. From the Merchant Menu, click QuickStore Admin.
2. From the drop-down box, select the QuickStore that you want to change the monthly fee for.
3. Click Edit.
4. In the Fee text box, change the current amount to the new amount.
5. Click Update.

To enable the merchant menu link:

1. From the Merchant Menu, click QuickStore Admin.
2. From the drop-down box, select the QuickStore that will have access to the Merchant Menu.
3. Click Edit.
4. Select the Enable Merchant Menu Link.
5. Click Update. A button named Advanced Menu will link to the Merchant Administration Menu. The button will be available from the QuickStore Administration Menu.

Billing QuickStore accounts

QuickStore accounts are setup to debit once a month. You will need to access QuickStore Admin in order to bill the QuickStore accounts. If there are not any accounts due for processing, you will be shown a page similar to figure 85 when you click QuickStore Admin.

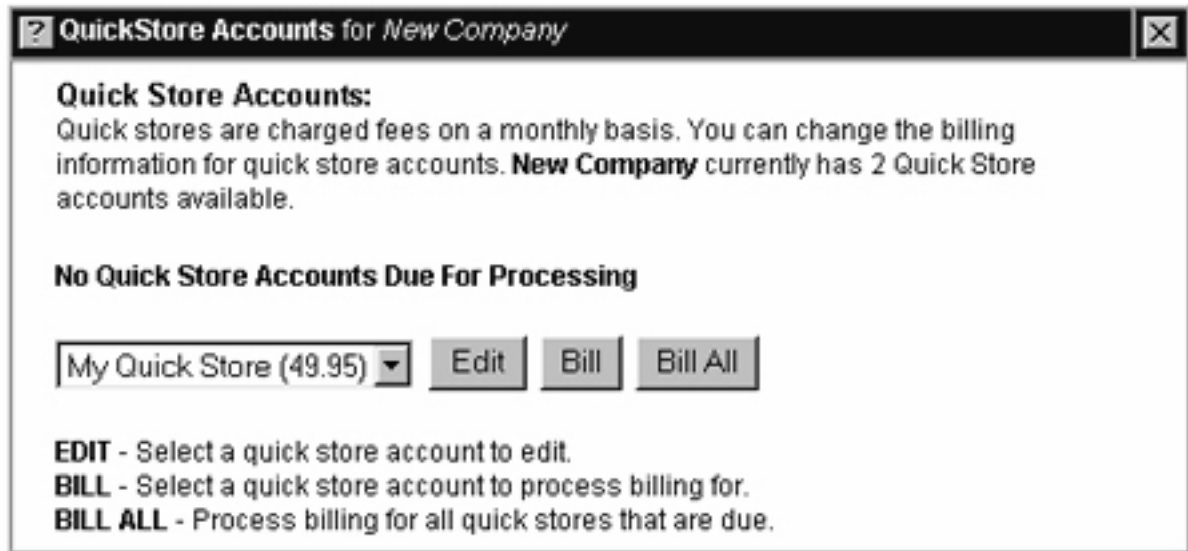


FIGURE 83. QuickStore Accounts

The figure above states that there are no QuickStores that are due for billing. Even if you accidentally tried to bill a QuickStore, it wouldn't enable you to.

If there are accounts due for processing, you will be shown a page similar to figure 86 when you click Quick-Store Admin.

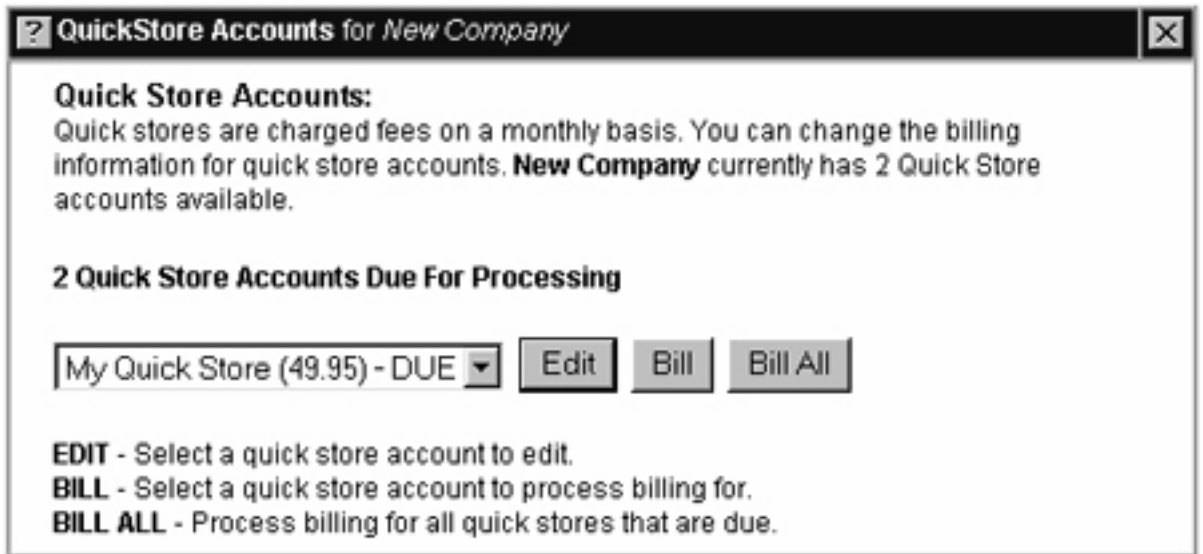


FIGURE 84. QuickStore Accounts

The page depicted in figure 86 shows how many QuickStore accounts are due for processing. In the drop-down box, the word “Due” appears next to the stores that need to be processed. You can bill all the QuickStore accounts that are due or you can bill one at a time. If you click Bill All, it will only bill those accounts that are due.

To bill a single QuickStore account:

1. From the Merchant Menu, click QuickStore Admin.
2. From the drop-down box, select the QuickStore that you want to bill.
3. Click Bill.

To bill all your QuickStores:

1. From the Merchant Menu, click QuickStore Admin.
2. Click Bill All. This will automatically bill all accounts that are labeled as due.

AbleShipper

This supplementary document overviews procedures for setting up AbleShipper auto-shipping calculator. This is a new ColdFusion Tag that is now available with all versions of AbleCommerce.

AbleShipper automates UPS shipping calculations in the U.S. (including Alaska and Hawaii) for UPS shipping including the price changes effective 02/07/1998. For complete documentation on AbleCommerce's manual shipping setup, see Chapter 8 "Shipping".

What is AbleShipper

AbleShipper is included in all AbleCommerce products and it automates the process of giving the customer correct shipping price options in the basket. AbleShipper can also calculate insurance and weight additions. Sometimes, a company's shipping point (FOB) is not the same as the company's advertised location. To allow for this, AbleShipper lets you add a special "FOB Zip" to you company's records. There is also an option to add a Store Surcharge to all calculations to pay for general shipping expenses. The Store Administrator is given the option to edit these features in the Merchant Shipping section of AbleCommerce administration.

AbleShipper has a specially written ColdFusion Tag that modularizes the actual shipping calculations. We've actually added a new command to ColdFusion so AbleShipper makes no outside calls to gain data (a problem with some solutions as the server may be down or the connection slow). Also, AbleShipper makes no database calls thus freeing up your server for other database duties.

Features	Details
Fast Response Time	Most accesses take considerably less than 1 second after the Tag has been loaded into the ColdFusion cache.
Accuracy	All results have been found to agree with UPS's own calculator after exhaustive testing.
No Outside Calls	AbleShipper makes no outside calls to other Internet sites to process data, thus is not dependant on Internet speeds or other servers status.
No Database Calls	AbleShipper makes no database calls in its operation. Everything is achieved by use of ColdFusion extensibility therefore relieving the server of extra database queries and aiding operational speed.
FOB Zip	Optional FOB Zip to allow for companies with different shipping points.

Figure 85 shows an example of a shopping basket during checkout, with AbleShipper enabled.

Current Order #4: 10-13-00 3:44 PM

Bill To:

Mike's Company
Mike Smith
123 Broadway
Suite 220
Vancouver, Washington 98661
UNITED STATES
Phone: 555-555-5555
users@your_domain.com

Ship To:

Mike's Company
Mike Smith
123 Broadway
Suite 220
Vancouver, Washington 98661
UNITED STATES
Phone: 555-555-5555

Example Store
1206 Y Street
Vancouver, WA 98661
UNITED STATES
Phone: 5555555555

Order # 4: 10-13-00 3:44 PM

Select Shipping Method:

UPS Ground Commercial \$7.16

UPS Ground Commercial \$7.16

UPS Ground Residential \$8.17

UPS 2nd Day Air \$14.04

UPS 2nd Day Air AM \$15.35

UPS Next Day Air Saver \$22.24

UPS Next Day Air \$25.28

Cancel

Continue

SKU	Items in Basket	Qty.	Price	Ext. Price
531548	Almond Biscotti	5	\$10.00	\$50.00
568425	Chocolate Covered Almond Biscot...	5	\$10.00	\$50.00
Subtotal:				\$100.00

FIGURE 85. AbleShipper

Important: AbleShipper will calculate the correct price for any weights entered in the inventory records. If weights are not entered, AbleShipper will calculate all products as weighing one pound (1 lb.), the UPS minimum.

After the user clicks continue, AbleShipper passes the selected option and price to the basket routine as normal.

Enabling AbleShipper

Having installed AbleShipper correctly, you can enable or disable AbleShipper as follows.

Shipping Class for New Store

☒ **A** - Calculates shipping using a flat fee.

☐ **B** - Calculates shipping using a flat fee plus a weight fee.

☐ **C** - No shipping. (You may use options to add shipping on a per product basis.)

☐ **D** - Calculates shipping based on the total order amount. (Matrix)

☐ **E** - Calculates shipping based on a percentage of total order.

☐ **F** - Calculates shipping based on the total weight (Matrix).

Enable International shipping and transactions? ☒ YES ☐ NO
If enabled, the customer will be able to purchase from a country other than United States. You will need to configure shipping charges on a per country basis.

Enable AbleShipper UPS auto-calculator (U.S.)? ☒ YES ☐ NO
AbleShipper automatically calculates UPS shipping charges for domestic use only. If enabled, you must have a shipping class other than 'C' selected. Configure UPS shipping requirements through Shipping Admin from the Merchant Menu.

Enable Zip Code Verification at Checkout? ☐ YES ☒ NO
If enabled, the zip code entered during checkout will need to correspond to the state selected. This option should be enabled when using AbleShipper to auto-calculate shipping charges.

Update **Next >**

FIGURE 86. Enabling AbleShipper

To enable AbleShipper:

1. From the Store Settings menu, click the Shipping icon.
2. From the Shipping Class page, you will find a radio toggle labeled, "Enable AbleShipper UPS auto-calculator (U.S.)?". Click YES to enable AbleShipper.
3. Click Update to complete changes. If you had shipping class "C" selected, you may notice that it was automatically switched to shipping class "B". This is because AbleShipper needs an active shipping class in order to function.

To disable AbleShipper:

1. From the Store Settings menu, click the Shipping icon.
2. From the Shipping Class page, you will find a radio toggle labeled, "Enable AbleShipper UPS auto-calculator (U.S.)?". Click NO to disable AbleShipper.

Editing AbleShipper

Having enabled AbleShipper, it is now possible to setup and edit various options.

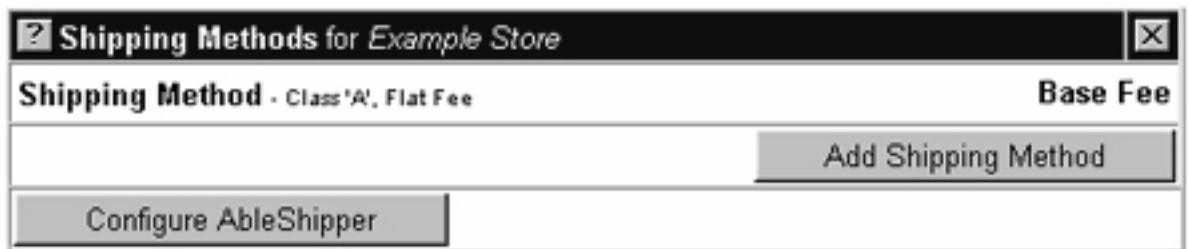


FIGURE 87. Configure AbleShipper

To configure AbleShipper:

1. From the Merchant Menu, click the Shipping icon.
2. From the Shipping Method page, click the Configure AbleShipper button. This will only appear if AbleShipper is enabled through Store Settings.

The AbleShipper edit page is now displayed.

Edit AbleShipper for Example Store

UPS Shipping Options

Select the UPS shipping options you want AbleShipper to auto-calculate. At present AbleShipper only supports service in the USA including Hawaii and Alaska. This is a "Multiple Select" box. Use the CTRL Key to select multiple options.

Calculate Insurance
☒

Add insurance for values over \$100. UPS insures packages up to a value of \$100 for free.

Surcharge
\$3.00

You can enter a base surcharge that this company always adds to each shipment for general shipping/packing expenses.

Weight Units
☐ oz ☒ lb
☐ gm ☐ Kg

Pick the unit of weight that this company uses in it's inventory.

Update

FIGURE 88. Editing AbleShipper

AbleShipper edit options:

1. **UPS Shipping Options:** Select one or more shipping options that this store wishes to offer in their basket. It is a "multiple select" box, so you can use Ctrl or Shift keys to highlight multiple options. Only valid UPS shipping options will be returned to the basket select box at checkout. For example, there is no UPS Ground Commercial service to Hawaii.
2. **Calculate Insurance:** Check this box if you want AbleShipper to calculate insurance for shipments that are more than \$100 in value. UPS calculates their insurance rate at \$0.35 per \$100 (value), once the original \$100 value has been exceeded.

3. **Surcharge:** This field is to allow companies to charge an "across the board" shipping charge to account for general shipping and packing expenses. Enter a dollar amount, with no dollar sign (i.e. 1.75).
4. **Weight Units:** These radio buttons let you set the base weight unit for a company. The AbleShipper tag calculates in lbs as does UPS however, we have added this conversion utility to cover all possibilities. Be careful to make sure that any weights entered for your products are using the same Base Weight Unit as selected here.

After you have finished editing AbleShipper, click the Update button to return to the Shipping Methods page. AbleShipper has been successfully setup and configured, now you need to verify the correct shipping point zip code.

Company FOB zip

The company FOB Zip field (shipping point) is included for companies that ship from a different location than that advertised on the invoice. Since AbleShipper calculates costs based on the distance between the From Zip and the To Zip, the use of the new FOB Zip field becomes extremely important. With the installation and enabling of AbleShipper, you will find one additional field in the Company Information page. This enables you to store a different Zip code for your FOB (ship point). If AbleShipper finds this FOB Zip, it will use that instead of the regular Company Zip.

Note: *AbleShipper is unable to calculate shipping costs if the FOB zip of origin is located in Hawaii or Alaska. If the shipping address is located in Hawaii or Alaska and the package is being shipped from one of the 48 contiguous states, then ground delivery shipping will be automatically removed from the selections.*

Company Information for *Example Store*

Store Name: Example Store

Address 1: 5139 NE 94th Ave.

Address 2:

City: Vancouver

State: WA

Zip: 98662

FOB Zip: 98661

AbleShipper Active: To accurately calculate shipping charges, you need to use the correct zip code for the shipping point. You will need to enter the FOB zip only if this store's zip code is not the shipping point.

Country: United States

Currency Format: English (US) -- \$1,234.56

Date Format: mm-dd-yy -- 10-12-00

Time Format: h:mm tt -- 11:28 AM

Phone: 360-253-4142

Fax: 360-253-2136

Email: info@ablecommerce.com

Home URL:

Use Home URL only to override the default home page created in Web Pages.
(i.e. http://127.0.0.1/index.cfm)

Click **Preview** to see your company settings, then **Finish**

FIGURE 89. FOB Zip in Company Information

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Editing AbleShipper FOB zip:

1. From the Merchant Menu, click the Company image.
2. From the Company Information page, you will find the field FOB Zip if AbleShipper is enabled.
3. Enter your 5 digit U.S. zip code only if different from the company zip. If this store does not have a separate shipping point, leave the FOB Zip field blank.
4. Click the Preview button to see your company settings or click Finish complete the changes.

