KURANT

StoreSense

KURANT

Kurant StoreSense Store Administration

User Guide
Version 3.0.1

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Store Administration

The Administration home page provides a quick summary of your store activity, highlighting items where action is required to complete the sale process. Click the links or icons to go directly to the items requiring action. An icon will change from color to black and white when all action items are cleared for that area.

An expanded store activity page is available by clicking **Store Activity**.

The choices at the left (and also shown at the bottom) take you directly to the location that deals with that aspect of administration. These choices are available throughout store administration.

Login/Logoff

In order to access the administration managers, you must login using a valid user name and password.

Although you can see the primary menus, if you try to access a manager to which you do not have access, you will be prompted to enter a valid login for that manager.

Your login is valid for eight hours from the *last* time you accessed the application. If you leave your terminal for an extended period, it is recommended that you logoff by clicking **Logoff**.

Only those with authorization to the Store Manager can grant access to the other managers.

Store Manager

The Store Manager provides access to preferences and settings that set up and customize your store. You can set up sales and promotions, set tax rates and shipping charges and view reports on the status for your store. The features that are available will depend on the version of StoreSense you have.

- ♦ General Preferences: define your store, security, customer numbering, search, cart and template options.

- ♦ Billing Preferences: enable SSL, setup credit cards and other ordering options.

- ♦ Mail Preferences: define email notification options.

- ♦ Shipping Zones: create shipping zones and costs.

- ♦ Sales Tax Tables: create sales tax tables.

- ♦ Inventory Preferences: enable inventory tracking and control product display.

- ♦ Promotions: enable storewide sales and define gift wrap options.

- ♦ Users: create user ids for those who can access Store Administration.

- ♦ Setup Wizard: create your store using a step by step guide.

- ♦ Maintenance: clean up your databases.

General Preferences

This page allows you to define your store, security, customer numbering, search, cart and template options.

Enter your information or edits, and click **Submit** to save your work. To clear your edits, click **Clear**.

Store Information

Enter your store's name, its URL, your business address, phone numbers, and your contact e-mail address. Please contact your Site Administrator to get the correct URL.

Store is open for business
When selected, the Store is open. If you are making significant changes to your store inventory or layout you may want to close the store. This option will display a customizable note to customers that the store is currently closed.

Enable Member Only area
When selected, a valid e-mail address and password will be required to enter the member catalog features. In addition, you can specify whether or not the visitor will have had to purchase a subscription product within the specified time period.

Store
Select this check box to enable security for all store pages. Doing so will require all users to log in to the store via a pop-up window. This feature is often used by merchants when developing their store, so that they may view their work without opening the store to the public.

Administration
Checking **Enable security for all administration pages** will require all users to log in to the store via a pop-up window. This feature is often used by merchants when developing their store, so that they may view their work without allowing others to view their work.

Checking **Enable SSL for all administration pages** enables SSL for the administration area.

Customer Number Options

Prefix
The prefix for your customer numbers. Enter this exactly as you want it to appear. The length of the prefix plus the number of digits cannot exceed 20.

Digits
The number of digits that you would like formatted. For example, if you enter a prefix of "KUR" and 5 for the number digits, the resulting number would appear as "KUR00000".

Starting Number
The starting number for assigning customer numbers. Note that this is only valid for the first customer added. If you delete all your customers, then it will apply to the next customer.

Search and Cart Options

Max Per Page
The maximum number of products to be shown on a page when a customer performs a search. If you have a large product database, setting the maximum can help to speed up the search process. If a search yields more than the Max per page, **Next** will appear at the bottom of the page prompting the customer that more products were found that match their search criteria.

Min Length
The number entered in this field, combined with the search criteria a user enters, controls how the search engine looks for products. If the user enters a number of characters that is greater than or equal to the number that is entered in this field, the search engine will look for all instances of that block of characters in the product information. If the user enters *fewer* characters than are entered in this field, the search engine will look only for that product information that *begins* with those characters.

For example, if you enter "3" in this box, and the user enters "dol" or "doll" (three or four characters respectively), the search results could include "babydoll" and "dolly". However, if the user only entered "do" (only two characters, less than the number entered in this field), the search results would only bring back "dolly"

Search Status
If selected, the number of products found in the search will be displayed at the top of the page, and the range will be shown on the current page. This feature is used in conjunction with the Max Per Page option. For example, if Max Per Page is set at 10 and 25 products match the search word, then "Products Found: 25 (1-10)" will be displayed to the customer on the first

page. The second page would show "Products Found: 25 (11-20)" and so on. The message text displayed is customizable.

Cart Available
Enter the length of time for which you want a visitor's cart to be remembered. This assumes that if a customer has not returned and reactivated their cart within that time period that the information contained within it (product and pricing), may no longer be valid.

Invoice
If **Empty Cart on Cancel** is selected, the customer's cart is automatically emptied when they cancel an order during checkout.

Template Options

If you have more than one template set, select the set you wish to use from the drop-down list.

Billing Preferences

This page allows you to enable SSL, setup credit cards and other ordering options.

Enter your information or edits, and click **Submit** to save your work. To clear your edits, click **Clear**.

Storewide Preferences

Security
Use this option to enable SSL during the order process. When the customer begins the checkout process, all activity through order confirmation will be SSL protected. You must have a SSL certificate installed to use this feature.

Order Limit
Enter the maximum dollar amount your store will accept for an individual transaction. Any order over this dollar amount will receive a message that is defined using the Purchase Order Limit template. It is not necessary to set a limit — this feature is optional. In addition, you may set individual customer limits in a customer's profile that will override the store limit (higher or lower).

Currency
Select the currency that the store will be accepting from the drop-down list.

Credit Cards

Select the credit cards you accept, if any. If you have a store card, enter the name of that card.

Require customers to provide credit card information
Select this check box to indicate if the customer is required to submit credit card information with their order, rather than sending it separately. If this box is selected, the customer will not be allowed to complete the order process without entering their credit card information. However, they can complete the order if they go back and choose another payment option.

Retain customer credit card information
Select this check box to indicate if customer credit card information should be saved. With this

option enabled, returning customers will not have to reenter their credit card each time they purchase from your store. If you are not using a payment processor such as CyberCash or CyberSource and you accept credit cards, you must enable this option.

Show credit card information within administration
Select this check box to display credit card numbers within the administrative area. If you will be processing credit card numbers offline, you need to select this box so that the information is available for entry into your terminal.

Enable Credit Card Test Mode
Select this check box to enable a credit test mode to test your new credit card processor account.

Processor
If you are processing payments online, select the appropriate payment processor. Click **Configure** to enter the configuration information for the selected payment processor.

Invoice Note
This note appears only if the customer chooses to pay by credit card and wishes to send the number separately. Generally, you should indicate the number of days an order will be held pending receipt of the credit card number.

Checks and Money Orders

Select this check box to indicate that you accept checks and money orders.

Invoice Note
This note appears on every invoice where the selected payment method is Check and Money Order Generally, you should indicate the number of days an order will be held pending receipt of the check or money order.

Purchase Order

Select this check box to indicate that you accept Purchase Orders. If you do, you may want to establish limits. This can be done on a per transaction basis by customer. Go to the Customer Manager for more information.

Invoice Note
This note appears only where the selected payment is Purchase Order and the customer has not yet been assigned a PO limit. You may want to add a note that an order will be held pending credit approval.

Department Orders

Select this check box to indicate that you accept department orders (orders from another department within your company).

Invoice Note
This note appears on every invoice where the selected payment method is Department Order.

CyberCash Configuration

This page allows you to customize your CyberCash configuration options.

Processor Type
Indicate whether your processor is host based or terminal based. This information should be obtained from your bank when you set up your merchant account. Additional information regarding processor types is available on the CyberCash web site.

Fulfillment Method
Indicate whether your fulfillment method is immediate (within 24 hours) or future. Your fulfillment method is important in setting up your CyberCash account and determining when a customer's credit card will be charged.

AVS Codes (Address Verification System)
Enter all acceptable AVS response codes here. When left blank, all AVS codes returned via CyberCash will be accepted and will not affect the authorization process.

To reduce the risk of credit card fraud, you may want to limit credit card authorizations to those that comply with specific AVS codes. Enabling this option should be discussed with your bank representative. A list of AVS codes is available from the CyberCash web site or your bank. Note: not all processors utilize the AVS system.

Cybercash ID
Enter the ID assigned to you by Cybercash.

Hash Secret
Enter the code assigned to you by Cybercash. To increase accuracy, it is recommended that you copy this information from your amps.cybercash.com area into this field.

Merchant Key
Enter the key assigned to you by Cybercash. To increase accuracy, it is recommended that you copy this information from your amps.cybercash.com area into this field.

CyberSource Configuration

This page allows you to customize your CyberSource configuration options.

Processor Type
Indicate whether your processor is host based or terminal based. This information should be obtained from your bank when you set up your merchant account. Additional information regarding processor types is available on the CyberSource web site.

Fulfillment Method
Indicate whether your fulfillment method is immediate (within 24 hours) or future. Your fulfillment method is important in setting up your CyberSource account and determining when a customer's credit card will be charged.

Merchant ID, Server Name, Server URL
Enter the information provided to you by CyberSource.

Merchant Certificate File, Merchant Private Key File, CyberSource Certificate File
These drop-down lists will be empty until you upload the certificate file (page 7) provided to you by CyberSource. After uploading that file, you can select the appropriate files from the drop-down list.

AVS Check
This controls whether authorization transactions will enable or disable CyberSource AVS checks when they are submitted to CyberSource.

Debug Level
Enter a debug level. 0 = lowest (default), 5 = log everything.

CyberSource Upload

Use this form to upload new or updated merchant key, merchant certificate, and CyberSource certificate files.

To skip the upload for a particular file type, leave its file name field blank.

Important: Existing key/certificate files by the same name in your CyberSource configuration directory on the server will be overwritten. To maintain different versions of key and certificate files on the server, use different file names.

Mail Preferences

This page allows you to define e-mail notification options.

Enter your information or edits, and click **Submit** to save your work. To clear your edits, click **Clear**.

Basic Information

Staff E-mail
The e-mail address of the person to receive the notices checked under Notification Options.

Mail Server
The SMTP server you use to send Internet mail.

Server Port
The mail port for the server you use to send e-mail. The default port is 25.

Notification Options

Send customer order confirmation
Select this check box to send e-mail to the customer confirming their order after it has been received into the system.

Send customer credit confirmation
Select this check box to automatically send e-mail to customers notifying them that a credit has been processed.

Send customer shipping confirmation
Select this check box to automatically send e-mail to customers notifying them that their order has been shipped.

Copy staff on order and shipping confirmations
Select this check box to send e-mail to staff when a customer places an order or a customer's order ships.

Shipping Information

Use zones to create your rules for applying shipping charges. Shipping charges are automatically entered on the invoice when the customer makes a purchase.

Shipping Basis
Indicate whether shipping charges are to be based on the dollar amount of the order, by its total weight, or by the total number of items in the cart. In order to charge shipping by order weight you must provide a weight for each product in the Product Manager.

Each amount/weight level setting is the maximum at which the indicated charge will be applied. For example, if your initial level is 10 pounds, any item over 0 and up to 10 pounds will be charged the Level 1 shipping charge. At 10.01 the second level charges will be applied.

Ship To Location Basis
Indicate how you want to base shipping charges: either based on the ship to state and country, or based on the ship to zip/postal code or country. Zip code basis is only available for the US.

Note: You must click **Update** when changing the Shipping Basis or the Ship To Location Basis. You must do this before modifying Shipping Zones, Levels, or Methods.

Shipping Zones

Shipping Zones represent the geographic regions used to determine shipping costs. A value of *All* indicates that the zone applies to all countries.

♦ To create a new zone, click **Add Zone**.

♦ To modify an existing zone, click the zone name.

♦ To remove a zone, select the check box next to the zone(s) you want to delete and click **Delete Zone(s)**.

Note: it is recommended that you create a default shipping zone. See Shipping Zones (page 9) for more information.

Shipping Levels
Shipping Levels are the prices for each of the available Shipping Methods.

Shipping Methods
Shipping Methods define the specific shipping options available to the customer (next day, two day, etc.).

Shipping Zones

Shipping Zones represent the geographic regions used to determine shipping costs.

Zone Information

Name
The name of the zone. If this is your default shipping zone, enter **Default**.

Country
The country to which the zone applies. This must be an exact match with the country provided by the customer at checkout. We suggest you provide a country drop-down list on checkout if you plan to use this feature. To have this zone apply to all countries (your default), leave the country blank or enter "All".

State/Province
The state to which the zone applies. This option is only available if your **Ship To Location Basis** is State/Country. Use the standard postal two character abbreviation for the state. To have this zone apply to all states or for countries other than the US or Canada (your default), leave the field blank or enter "All".

Zip Code
The zip code range to which this zone applies. This option is only available if your Ship To Location Basis is Zip Code/Country. You must provide a starting postal code as well as an ending postal code. All codes within this range will use this zone. If this is your default shipping zone, set the low end of the range to "00000" and the high end to "99999".

Level Information

Level 1 (as defined in Shipping Methods)
The dollar amount to charge for the default shipping rate.

Level 2 (as defined in Shipping Methods)
The dollar amount to charge for shipping the package in two days.

Level 3 (as defined in Shipping Methods)
The dollar amount to charge for shipping the package using next day air service.

Click **Submit** to make the changes or click **Clear** to discard them and retain the previous values.

Shipping Levels

Shipping Levels are the prices for each of the available Shipping Methods, and will appear in the customer's cart.

To delete a level, select it and click **Delete**. To add a level, enter the information under **Add Shipping Level** and click **Add Level**.

Level
The level number.

Standard
The dollar amount to charge for the default shipping rate.

Two Day
The dollar amount to charge for shipping the package in two days.

Next Day
The dollar amount to charge for shipping the package using next day air service.

Click **Set Defaults** to make the changes or click **Clear** to discard them and retain the previous values.

Shipping Methods

Shipping Methods define the specific shipping options available to the customer (next day, two day, etc.).

Standard
Enter a name for your regular shipping method. Your description can be up to 25 characters. The default is "Standard".

Two Day
Enter a name for your two day shipping method. Your description can be up to 25 characters. The default is "Two Day".

Next Day
Enter a name for your next day or overnight shipping method. Your description can be up to 25 characters. The default is "Next Day".

Click **Submit** to make the changes or click **Clear** to discard them and retain the previous values.

Sales Tax

Certain states and counties require you to collect sales tax from customers whose billing address is in that state.

Note: it is recommended that you consult with your local government tax office before updating the information on this page.

Listed are states previously entered. To remove one, select the check box next to it and click **Remove**. This may be necessary when a tax rate changes. To clear the checks, click **Clear**.

Enter the standard postal abbreviation for the state (two capital letters), or enter the county name. Then, enter the tax rate in decimal form. For example, enter 0.05 for five percent.

Click **Submit** to add the state to the list, or click **Clear** to discard your edits.

Inventory Preferences

(Pro version only)

Enable Inventory
Select this check box to enable the inventory features of StoreSense. This will cause products to be removed from inventory when purchased.

Enable Serialized Inventory
Select this check box to enable the serialized inventory features of StoreSense. This will add the ability to associate serial numbers with a product. When a product is purchased, a serial number is taken from the pool of serial numbers and assigned to the purchased product.

Hide products from catalog when quantity is zero
Select this check box to hide products from the shopper when you're out of stock on that product.

Hide products from catalog when threshold is reached
Select this check box to hide products from the shopper when you're low on inventory (their threshold is reached). If no inventory threshold is entered for the product, the default threshold is zero. The product threshold is defined in the Product Manager.

Show backorder status on the invoice
Select this check box to show backorder status on the invoice. Backorder status will appear under each product line item that does not have enough inventory to fill the order.

Do not allow backorders
Select this check box to ensure a product cannot be purchased if there are not enough products in inventory. If a customer attempts to purchase more than is available, they will be notified that there are not enough products available and will be allowed to adjust their order.

Promotions

This page allows you to enable storewide sales and define gift wrap options.

Enable storewide sale
Select this check box to enable a storewide sale, which provides a discount on every product except those excluded from storewide sales (as defined in the Product Manager).

Sale Dates
Enter the beginning and ending dates of the sale.

Discount

Enter the discount for the sale. For example, enter 0.05 to indicate a 5% discount. The percentage discount will calculate from the original product price only. It will not further discount products already on sale.

Description

Enter what you would like to call the sale, for example: Pre-Season Sale.

Allow gift shipments

Indicate if you would like to offer gift shipments. This allows the customer to send the item as a gift. They are prompted for a separate ship-to address and for a personal message to be included with the gift.

Enable gift wrapping service

Select this check box if you would like to offer gift wrapping service and enter a price you'll charge for the gift wrapping. Gift wrapping is shown as a line item on the invoice. If the consumer chooses gift wrapping, each line item on the invoice will receive a separate line item charge for gift wrapping.

List Products on Sale

Click to display a list of products that are currently on sale.

Special Promotions

From this page, you can maintain the details of any special promotions you might run. For example, you might give a discount if the customer indicates they saw your ad in a magazine. The ad would contain a code that they would enter when they order the product.

Current Special Promotions

To remove any of the existing promotions, select the promotions and click **Remove**. Click **Clear** to remove the checks. You will not be able to remove promotions that have orders associated with them.

Add a Special Promotion

Code

The code that the customer must enter to receive the discount.

Description

A description of the promotion for your use.

Invoice Text

The text that is printed on the invoice to show the customer that they received the discount.

Discount

The amount of the discount, in decimal form. For example, enter 0.10 for ten percent.

Start Date

The date the special promotion begins. Enter the date in a MM/DD/YYYY format.

End Date
The date the special promotion ends. Enter the date in a MM/DD/YYYY format.

Qty Discount
Select this check box to apply the special promotion discount in addition to any quantity discounts that may be available.

Store Sale
Select this check box to apply the special promotion discount in addition to any relevant sales discounts.

Users

This page allows you to set your permissions for each module within the administration area. This was designed to provide increased security to the sensitive areas within the administration area, while still taking advantage of the separate modules working together.

A few notes regarding how the modules work together:

♦ The system was designed with the assumption that the person responsible for processing and approving orders would also need access to customer information. For that reason, there are links within the Order Manager that take the user directly to the Customer Manager. If you do not set your permissions this way, the links will not work. An example of this functional crossover would be when the order manager needs to enter a phoned in credit card number to the Customer Profile.

♦ The Shipping Manager is designed to work without needing access to any of the other modules. For example, if you outsource the shipping feature, warehouse personnel could have access only to the Shipping Manager to mark orders shipped. From the Shipping Manager they would not have access to any pricing or customer information (other than the shipping address).

It is highly recommended that you create your own administrative user name and password and then delete the default admin user.

Note: StoreSense will not let you delete the user that is currently logged on (yourself).

Current Users

Listed are your current users and their respective authorizations. To remove one, select the check box next to it and click **Remove**. To clear the checks, click **Clear**.

Add User

User Name
Enter a name for the user. The name can be a maximum of 10 characters. Names are case sensitive.

User Password
Enter a password for the user. The password must be between 4 and 10 characters. Passwords are case sensitive. Passwords are encrypted using 32-bit keys and cannot be viewed within the system. If a password is forgotten, the user must be removed and recreated.

Confirm Password
To ensure the password was entered correctly, you must type it again.

Authorizations
Select the check box for each area to which this user will have access. The Support Modules include access to templates and the import/export features.

Click **Submit** to add the user to the list, or click **Clear** to discard them.

Setup Wizard

The Setup Wizard walks you through the basics of configuring your new store. The entire process should take between 15 and 30 minutes.

Before getting started you should review the StoreSense Setup Checklist. Be sure to have all your information before continuing.

Store Preferences

In this section, you provide the basic information about your store including its name, your contact information, and the payment methods your store accepts.

In order to accept credit cards you must establish a merchant account. This is handled through your bank. If you wish to process your credit cards online, you will need to establish a credit card payment processor account.

Layout & Design

This section allows you to choose a layout scheme for your store. You can use the design as is or modify it later using the Template Editor to meet your needs.

Note: running the Setup Wizard and making layout changes will overwrite any edits you have made to these templates.

Products

This section allows you to enter the minimal product information necessary to begin selling online. To add additional products or to modify your existing products, use the Product Manager. You can also import information for multiple products using the Import/Export feature (click **Support** to access this feature).

Upload Images

This section allows you to upload your store and product images. Images should be in JPG or GIF format. For product images, the file name must match the image name you associated with the product.

Open My Store

This is the final step and officially opens your store. You can go to your storefront to see the results of your work. You can close your store using Store Manager, General Preferences.

Maintenance

Purge Databases

Use this feature to purge all information from your database. If a customer does not confirm or cancel their order, the order information remains in the order database. Since this information is not used, it is safe to remove. Customer information is saved to the customer table.

To purge information from your database, select the information you wish to purge and click **Purge**. This action can *not* be reversed.

Search Results Purge

StoreSense saves all search results in its database. To remove those search results, enter the number of days for which you wish to save your search results and click **Purge**.

Product Manager

The Product Manager provides access to your product line and manufacturers.

With the Professional Edition, you can review current inventory levels, establish inventory thresholds, update product inventory, relate products with one another and place individual products on sale.

♦ List Products: view and update product information. To locate a product, type the starting characters of the product name and click **Go**. For all products, click **Go**.

♦ Add Product: add a new product. You can also import information for multiple products using the Import/Export feature — see Import/Export (page 53) for more information.

♦ Products On Sale: displays a list of products currently on sale.

♦ Low Inventory Products: displays a list of products whose inventory is low.

♦ Backordered Products: displays a list of products on backorder.

♦ Manufacturers: view, update and add manufacturers. You can also view products by manufacturer from this page.

♦ Suppliers: view, update and add suppliers. You can also send and receive supplier notifications from this page.

♦ Custom Fields: create custom product fields.

Product List

To locate a product, type the starting characters of the product name and click **Go**. To list all products, just click **Go**.

This will bring you to a listing that shows Product Name, SKU, Manufacturer, Price, Quantity and whether or not the product is currently Active.

♦ To view the information on a particular product, click the product name. This will bring you to a page where you can review and update product information, and then see a preview of what it will look like in the store.

♦ To remove a product from the catalog, select the product and click **Delete**. The product will no longer be available to your customers unless you reenter all the information. The system will allow you to delete a product only if it has never been ordered. If it has been previously ordered, the system will regard the product as inactive, rather than deleted.

♦ Click **Clear** to discard the checks. Click **Add** to add a new product.

View Product Information

This page shows information pertaining to the product.

- To revise the information, click **Update**.

- To view or update current category/subcategory associations click **Categories**.

- To link this product to other similar or related products, click **Related**. If the product is available in different sizes and/or colors, click **Attributes** to view or modify pricing and inventory details.

- Click **Serial** to view or modify product serial numbers. This option will only appear if you have selected the **Enable Serialized Inventory** option in Store Manager, Inventory Preferences.

Product Pricing & Inventory Details

AKA Product Attributes

(Pro version only)

This is where information about a product's size and/or color options is maintained. The available sizes/colors are entered when you add or update a product. This area is important if you will be tracking the inventory or sales of the individual product attributes. If so, you must enter a separate SKU number and quantity for each attribute you want to track.

Current Details

Listed are the current options/colors. To modify the existing information, click the number to the left of the SKU. Make the changes and click **Submit** to save the changes, or click **Clear** to discard them and retain the previous values.

Add Detail

The system will automatically default each field with the main product information.

SKU
Enter a new SKU (or item number) for the option. You may want to simply add a suffix (indicating size or color) to the number previously entered when adding a product. A separate SKU number is required if you will be tracking the inventory of each attribute individually.

Color
Select a color from the drop-down list or leave as All if color is not applicable. If you select All, you cannot select All in the **Size** field.

Size
Select a size from the drop-down list or leave as All if size is not applicable. If you select All, you cannot select All in the **Color** field.

Price
The standard price you want to charge customers for the product attribute. The default is the main product price.

Qty Discount
The price you'll charge if the customer buys a certain quantity, and that quantity. The default is the main product discount information.

Cost

What the product cost you to purchase. The default is the main product cost.

Sale

The price to charge if the product is on sale. The system will default this field with any sale information input in the main product.

Weight

The shipping weight for shipping charge calculation. The default is the main product shipping weight.

Quantity

The quantity of this product you currently have in stock. The default is the main product quantity. It is important to update this field if you are planning on tracking inventory for each attribute.

Unit of Measure

The quantity the customer receives if they order one of something. Generally used if your business does not sell products individually (eaches), but requires the customer to order by the case, box, etc. This field allows you to enter the quantity packing information for each product. The default is the main product unit of measure.

Click **Submit** to save the changes or click **Clear** to discard the changes, retaining the previous information.

Related Products and Accessories

(Pro version only)

These links are used to upsell related products or accessories that might not appear in the search results of the primary product. This option is used to prompt the customer for a potential purchase of a product they didn't search for, but is related to something in which they have already shown an interest. The link to view related products is available on the Catalog Detail page.

Shown is the selected product's SKU/Item No., Name and Price. Below it are listed the Current Related Products. If this is blank, then no products have been previously linked.

♦ To remove existing links, select the links and click **Remove**. Click **Clear** to clear the links.

♦ To create links, select the products to link to from the list and click **Relate**. If you decide not to create these links, click **Clear**.

Product Serialized Inventory

(Pro version only)

Use this feature to associate serial numbers with a product. Each product can have two unique serial numbers associated with it. If you use serial numbers, you should ensure that there is a serial number for each product in inventory.

When a product is purchased, serial numbers are taken using the first-in, first-out (FIFO) method. If a serialized product is returned, its numbers are appended to the end of the list.

Current Serialized Inventory

This area displays a list of current serial numbers for the product. To remove existing serial numbers, select the adjacent boxes and click **Delete**. Click **Reset** to clear the boxes.

Add Serialized Inventory

Serial No 1
This is the primary serial number for the product. It can contain any alphanumeric characters.

Serial No 2
This is the secondary serial number for the product. It can contain any alphanumeric characters.

To add, click **Submit**.

Product Category List

This page displays a list of categories associated with this product.

♦   To add a category to this product, select it from the drop-down list and click **Add**.

♦   To remove a category from this product, select the category box and click **Delete**.

Add/Update Product

This page appears when adding and updating a product.

♦   To see what this product would look like in the catalog, click **Preview**.

♦   When done, click **Submit** to add or update this product or click **Clear** to discard the entries. After clicking **Submit** you will be brought to a product information page.

Basic Information

Product
The product name as you want it to appear in the store to your customer (required).

SKU/Item No
The SKU or item number you use for the product. The SKU number is an optional field: the system maintains an internal product number that you can use instead of a SKU number.

OEM
Select the manufacturer's name from the drop-down list.

Keywords
Words a customer might use when searching for this item. Product Name, Manufacturer, Category and SKU are automatically included as keywords. Separate each keyword by a comma or a space.

Brief
A brief description of the product. Typically, the Brief Description is used for the catalog list page, where a product is viewed on a single page (following a search, for example), while the Description is used on the detail page. You may use HTML tags to customize the descriptive text.

Description
A more detailed description of the product, typically used for the Catalog Detail page (where the customer views a single product). Description and Brief can be the same. You may use HTML tags to customize the descriptive text.

Weight
The shipping weight of the product used for shipping charge calculation. This is required if you choose to charge shipping by Total Order Weight.

Thumbnail
The filename of a thumbnail image for the Catalog List page. The file type needs to be either .gif or .jpg.

Photo
The filename of a larger image for the Catalog Detail page. The file type needs to be either .gif or .jpg.

Template
The name of a template for this product for the Catalog Detail page. This is used to display a product differently than the rest of the catalog. Templates are added using the import feature of the template module. You may create as many product detail templates as necessary.

Product Type
Select the product type from the drop-down box. The default product type is Normal. Alternatively, if you select Lead, the product will display in the catalog, but will be unavailable for purchase. It will generate a sales lead form instead.(Pro version, *Sales Manager only*)

Show in catalog
Select this check box to display the product in the catalog. The default setting is to show the product in the catalog.

Subscription product
Select this check box to make this a "subscription" product. Only products defined as subscription products can be used to subscribe to the member only area.

Expires in *n* months
The number of months that a subscription is valid. This number is compared with the date the product was purchased to determine if the member is allowed access.

Special authorization required to purchase
Select this check box to require the customer to have the corresponding option selected in their profile. Use this to limit the customer's ability to purchase products requiring special authorization, such as controlled substances.(Pro version *only)*

Gather Order Extensions During Checkout
Select this check box to gather specific customer information that may be required for the purchase of this product.(Pro version *only*)

Order Extensions Template
Select the default order extensions template, or select your own custom template for gathering this information.

Pricing Information

Sell Price
The standard price you want to charge customers for the product (required).

Taxable
Select this check box if the product is subject to sales tax. The default setting for this option considers the product taxable.

Retail Price
Enter the retail price of the product. This can be used to display the "Suggested Retail Price" as a comparison to your price.

Surcharge
Enter the surcharge on the product. The surcharge is added to the calculated price of the product (after all sales and discounts) at checkout time.

Invoice Text
Enter a description for the surcharge. This text is used to describe the surcharge and will be displayed on the checkout and invoice pages.

Shipping (Surcharge)
Enter the cost of shipping for this product. This will be added to any shipping charge calculated as part of the shipping zone, where there is a special shipping charge in addition to the regular shipping.

Exclude from Shipping Charges
Select this check box if this product is excluded from shipping charges. This will void any shipping calculation defined in Shipping Information. You may still have a shipping surcharge and choose to bypass the shipping table.

Before selecting this option, you should create a "0" Shipping Level in Store Manager, Shipping Information.

Qty Discount
Enter the price you'll charge if the customer buys a certain quantity. Enter the quantity necessary to purchase to obtain the discount. For example, if you want to charge $4.00 if the customer buys five or more or this product, enter "4.00" as the price, and "5" as the quantity.

Sale Price
The price to charge if the product is on sale.

Sale Dates
The start and end dates that the product is on sale. Enter the date in a MM/DD/YYYY format. Sales start and end at 12:00 midnight on the selected dates.

Include same regular price attributes in sale
Select to include those product attributes with the same regular sales price as the product in the sale.

Exclude product from storewide sales
Select this check box to exclude this product from any storewide sales you may have.

Inventory Information

Quantity
The quantity of this product you currently have in stock. When the quantity is updated, the system will automatically clear any backorders, adjusting inventory accordingly. If you have multiple sizes and/or colors and will be tracking the inventory for each, enter the quantity of your default product. The default product should be the first product entered into the size/color option. Alternatively, you may enter 0 in this location, and choose to enter all inventory information into the attribute area. If you are not tracking inventory separately, enter the total quantity for all colors/sizes available for that particular product.(Pro version *only*)

Threshold
The number at which this becomes a low-inventory item. Any item that reaches its threshold will appear in the Low Inventory Items Report, to prompt reorder or catalog exclusion.

Unit of Measure
The quantity the customer receives if they order one of something. Generally used if your business does not sell products individually (eaches), but requires the customer to order by the case, box, etc. This field allows you to enter the quantity packing information for each product.

Cost
What the product cost you to purchase. This information is used when calculating Profit Margin and Cost of Inventory in the Reports Section.

Supplier
Select the appropriate supplier from the drop-down list. Suppliers must first be entered within the Supplier area of the Product Manager.

Options

Colors
The available colors, separated by commas or spaces. These will appear in the order entered in a drop-down list on the catalog detail page.

Sizes
The available sizes, separated by commas or spaces. These will appear in the order entered in a drop-down list on the catalog detail page.

Note: Inventory, pricing and other details for each color and size may be entered after submitting this form. This product may also be linked to other, related products at that time. Additional help is available at that location.

Custom Fields
These are for options for a product. For example, if you sell handkerchiefs, you might put "Monogramming" as the Title and your price as the Fee. If you select **Gather Custom Field**

When Added to Cart, the special service is shown on the Catalog Detail page and the customer is prompted for input (such as initials, for monogramming) on the order form.

These are considered services and therefore the system does not calculate tax for these items. In addition, they are excluded from the special promotions discount and storewide sales.

Custom Information

Enter up to six custom fields to display with the product. Custom fields are defined in the Custom Fields area of the Product Manager.(Pro version *only)*

Products on Sale

These are the products that are currently on sale. This report shows the Product Name, Quantity in inventory, Sale Price, Sale Start and End Dates.

To remove a product from the list, or to modify sale or other information, click the product name.

Low Inventory Products

Inventory is low for the products shown, as defined by their threshold values. If the threshold is not set, a product will not appear on this list until the inventory reaches zero.

It is also possible for a product to be backordered and not appear on this report. This is due to the fact that if there is not enough product available to fulfill an order, no inventory will be deducted and the order will move to backorder status. Any remaining product will be available to fill new orders. To see a listing of the information on a particular product, click the product name.

List Backordered Products

The following products are backordered. To remove a product from backorder status, you must add sufficient inventory into the product quantity area of the affected product.

It is important to note that a product can have quantity in inventory and still be backordered. The system will not reserve existing quantity, but will leave it available to fill other orders. To see a listing of the information on a particular product, click the product name. To view affected orders, go to the Order Manager and click **Orders Pending Backordered Items**.

Manufacturers

The Manufacturer section allows you to maintain information about your manufacturers.

♦   To locate a manufacturer profile, type the starting characters of the manufacturer's name and click **Go**. To list all manufacturers, just click **Go**.

♦ To add a manufacturer, click **Add Manufacturer**.

♦ To view a list of products by manufacturer, click **List Products by Manufacturer**.

Manufacturer List

To locate a manufacturer profile, type the starting characters of the manufacturer's name and click **Go**. To list all manufacturers, just click **Go**.

Listed are the names and URLs of the manufacturers previously entered.

♦ To modify an entry, click the manufacturer's name.

♦ To remove a manufacturer, select the box next to it and click **Delete**. To clear the boxes, click **Reset**.

♦ To add a new manufacturer to your list, click **Add Manufacturer**.

Add/Update Manufacturer Information

Use this page to add and update manufacturer information.

Manufacturer
The name of the manufacturer, as you want it to appear in the catalog and/or reports.

URL
This can either be the manufacturer's web site address, or another page containing information regarding the manufacturer.

Logo
The filename of the manufacturer's logo image. This is provided for those stores who wish to display the actual logo of the manufacturer next to the product. A template is available in this format.

Description
Enter a description for this manufacturer.

Template
If you have created and imported a custom catalog list template, you can choose to use it for this manufacturer by selecting it from the drop-down list.

Click **Submit** to add the manufacturer to the list or click **Clear** to discard it.

List Products by Manufacturer

This page provides a list of products sorted by manufacturer. Use it to quickly identify what products you have in stock for a manufacturer.

You can filter the list by typing the starting characters of the manufacturer's name. To list all manufacturers, just click **Go**.

Listed are the product name, the manufacturer, the product price, the current quantity on hand, and whether or not the product is active.

♦   To modify an entry, click the product name.

♦   To remove a product, select the box next to it and click **Delete Products**. To clear the boxes, click **Clear**.

♦   To add a new product, click **Add**.

Suppliers

(Pro version only)

The Supplier module provides access to your suppliers. Use it to maintain supplier information and define how you communicate with your suppliers.

If you wish to receive Supplier confirmations via a Post Office Protocol (POP) Server, you will need to setup the appropriate incoming mail preferences. Additionally, you will need to setup an account on your POP server to receive these confirmations.

♦   To locate a supplier profile, type the starting characters of the supplier's name and click **Go**. To list all suppliers, just click **Go**.

♦   To add a supplier, click **Add Supplier Profile**.

♦   To setup POP mail preferences, click **Supplier Incoming Mail Preferences**

♦   To send supplier notifications, click **Send Supplier Notifications**.

♦   To receive supplier notifications, click **Receive Supplier Notifications**.

Supplier List

To locate a supplier profile, type the starting characters of the supplier's name and click **Go**. To list all suppliers, just click **Go**.

Listed are the names, phone number, and notification options of the suppliers previously entered.

♦   To modify an entry, click the supplier's name.

♦   To remove a supplier, select the box next to it and click **Delete**. To clear the boxes, click **Reset**.

♦   To add a new supplier, click **Add Supplier**.

Add/Update Supplier Profile

Use this page to add or update a supplier.

Basic Information

Enter the name and address information for the supplier.

Fax

The supplier's fax number. If you choose Fax as the notification method, then this is the fax number where orders will be sent.

E-mail

The supplier's e-mail address. If you choose E-mail as the notification method, then this is the address where orders will be sent.

Suffix

Sometimes it's easier to track communications if you append a suffix to the invoice number when communicating with a supplier. If you choose to do this, then you can enter a suffix that helps identify that order

EDI Code

Enter the supplier's Electronic Data Interchange code. This is required in order for the supplier to electronically submit data.

Notification Options

Method

You can send an order notification to a supplier via fax, e-mail or file download. If you do not want to notify this supplier, choose **None**.

Group By

When orders are sent to a supplier they can be bundled in one of three ways: all, by order, or by line item. Choose **All** to send all orders in a single fax or e-mail. Choose **By Order** to send one fax or e-mail per order (invoice). Choose **By Line Item** to send a fax or e-mail for each line item in an order. The products will still first be grouped by supplier.

Template

Select the template to use when creating the fax, e-mail or download file. A template must be chosen if your notification method is fax, e-mail or download file.

Mark order as shipped when supplier notified

Depending upon your agreement with your supplier, you may choose to have an order marked "shipped" immediately upon notification. This has implications if the supplier does not ship within 48 hours.

Click **Submit** to add or update the supplier or click **Clear** to start over.

Supplier Incoming Mail Preferences

This page allows you to setup the appropriate incoming mail preferences so that you can receive Supplier confirmations via a Post Office Protocol (POP) Server.

Basic Information

Mail Server

The POP server you use to receive supplier confirmation e-mails.

E-mail Account

The e-mail address that is set up to receive supplier confirmations.

Password
The password for the e-mail account that receives supplier confirmations.

Server Port
The mail port for the server you use to receive POP e-mail (defaults to port 110).

Supplier Communications

The Supplier Communications options allows you to run supplier notification programs. Supplier confirmations must be submitted in a comma-delimited file with Header (H) and Detail (D) records. The format is as follows:

```
"H",customer number, invoice number, supplier invoice number, ship
via, ship date, invoice total...

"D",customer number, invoice number, supplier invoice number, ship
via, ship date, invoice total, SKU, quantity ordered, quantity
shipped, price...
```

These supplier confirmation files may be FTPd to the merchant's system area or e-mailed to the POP account that was setup to receive these confirmations.

♦ To send notifications to a supplier, click **Send Supplier Notifications**.

♦ To receive notifications from a supplier, click **Receive Supplier Notifications**.

Note: these services may be scheduled to run automatically. Contact your site administrator for more information.

Product Custom Fields

Custom Field Titles
You can assign a title to each of the six custom text fields that are associated with each product. These titles will be shown wherever product information is shown in the Administration area.

Click **Submit** to save or click **Clear** to discard the entries.

Category Manager

The Category Manager allows you to maintain a list of categories and link products to them.

♦ List Categories: view and update category information. To locate a category, type the starting characters of the category name and click **Go**. To list all categories, just click **Go**.

♦ Add Category: add a new category.

♦ Map Categories: display a map of categories and subcategories.

Category List

Shown are all existing categories and their descriptions.

♦ To update a category, click the category name.

♦ To remove a category, select the check box next to it and click **Delete**. All product links will be removed. If you are displaying your products by category and they were not already part of another category, you will need to create new links. If no links are created, the products will not display in the catalog.

♦ To clear all your selections, click **Reset**.

View/Add/Update Category

These pages either show information for a category or allow you to add and update a category.

When viewing information:

♦ Click **Update** to make changes to the category

♦ Click **Sub-categories** to create or remove sub-categories for this category.

Click **Submit** to add or update this product, or click **Clear** to discard the entries.

Description
A description of the category.

Photo
Filename for the image used to represent the category on the Catalog List page.

Members Only
Indicates a category is available only to members. This option is valid when the Members Only area is enabled within the Store Manager.

Header Template
Name of the header template to be used to display the category on the Catalog List page. This is best suited if you display a single category in the list.

List Template
If you have created and imported a custom Category List template and wish to use it for this category, select it from the drop-down list.

Footer Template
Name of the footer template used to display the category on the Catalog List page. This is best suited if you display a single category in the list.

Sub-Categories
List of sub-categories associated with this category.

Sub-Categories

This page shows all sub-categories associated with a category. It allows you to add, remove or delete sub-categories.

Current Sub-Categories
This area lists all sub-categories associated with a category. Click on the sub-category number to edit or remove the sub-category.

To edit a sub-category, click the number beside the sub-category name.

Add Sub-Category
This area allows you to add a sub-category to the category. Enter a name for the sub-category and click **Submit**. The sub-category will be shown in the list of current sub-categories.

Sub-Category Edit

This page allows you to change a sub-category's name.

♦ Make any changes to the sub-category name and click **Submit** to save.

♦ To delete the sub-category from this category, click **Delete**. You will return to the main sub-category page for the category.

Map Categories

This page provides a listing of the chosen category or categories, their associated sub-categories, and, optionally, the associated products.

To show associated products, select **Include Products**.

The list is organized by category, sub-category, and product. Sub-categories are shown in a different color.

If products are included, the product name, manufacturer, and SKU are shown.

Order Manager

The Order Manager provides access to customer orders, both pending and completed. If you are processing your orders offline, you will use the Order Manager to authorize orders and mark them shipped to close the order loop. Also from this page, you can issue or review credits against an invoice.

Orders Pending

- ♦ With Backordered Items
- ♦ Check or PO Approval Required
- ♦ Credit Card Authorization Required
- ♦ Ready for Shipping
- ♦ View by Supplier
- ♦ With Partial Shipments

Completed Orders and Credits

- ♦ Completed Orders
- ♦ Credits

View Order by Tracking or History Number

- ♦ View Order by Tracking or History Number: view a specific order.

View Order History By Customer

- ♦ Customer Order History: Takes you to the Customer Manager Module, where you can search for a customer and view their order history.

Orders Pending

These reports display pending order information.

- ♦ With Backordered Items
- ♦ Check or PO Approval Required
- ♦ Credit Card Authorization Required
- ♦ Ready for Shipping
- ♦ View by Supplier
- ♦ With Partial Shipments

Orders Pending with Backordered Items

Shown is a list of all customer orders that include backordered items.

The order will stay on the list until enough product has been received to fill the entire order. After the product inventory has been updated with the necessary quantity, the order(s) will automatically move to the appropriate order status location.

♦ To remove a product from backorder status, see Product Manager, Inventory Information. To view a list of all backordered products, see the Product Manager, List Backordered Products Report.

♦ To review an invoice, click the order date. If you would like to print the invoice, click **Format for Printing**.

♦ To review the customer profile, click the customer's name. You must have password authorization to the Customer Manager to access this feature.

♦ To cancel an order, select the box next to it and click **Cancel**. Clicking **Reset** clears the check box(es).

Orders Pending Check or PO Approval

Shown is a list of all customer orders with incomplete billing information (information that is required for their billing option is missing). Shown is the chosen form of payment and length of time since the order was placed.

♦ To review an invoice, click the order date. To print the invoice, click **Format for Printing**.

♦ To review the customer profile, click the customer's name. You must have password authorization to the Customer Manager to utilize this feature.

♦ When the billing information has been received, authorize the order by selecting the appropriate boxes and clicking **Authorize**. The order(s) will then be placed on the Orders Ready for Shipping list. Clicking **Reset** clears the check boxes.

♦ To cancel any of these orders, select the appropriate check box and click **Cancel Orders**. Clicking **Reset** clears the check boxes.

Orders Pending Credit Card Authorization

Shown is a list of all customer orders pending credit card authorization.

If you are processing credit card transactions offline, you will need to update this section manually. If you are processing online or real-time, the system will manage this area automatically.

♦ To review an invoice, click the order date.

♦ To review the customer profile, click the customer's name. You must have password authorization to the Customer Manager to utilize this feature.

♦ When credit card authorization has been received, authorize shipment by checking the appropriate boxes and clicking **Authorize**. The order(s) will then be placed on the Orders Ready for Shipping list. Clicking **Reset** clears the check boxes.

♦ To cancel any of these orders, select the appropriate box and click **Cancel Orders**. Clicking **Reset** clears the check boxes.

Orders Ready for Shipping

Shown is a list of the orders ready for shipping along with the shipping address, date shipped, shipper number field and method of shipment. Priority orders will appear in red (next day) or blue (two-day).

♦ To view the Packing List for this order, click the order date. The packing slip can be formatted using the Packing Slip template.

♦ To review the invoice, click the invoice number. You must have authorization to access the Order Manager to perform this feature.

♦ To send e-mail to the customer, click the customer's name.

♦ If you wish to include the shipper number provided by your shipping company, you may do so at this location. The number can be entered manually, or with a bar code scanner.

♦ To indicate that an order has been shipped, select the check box next to it and click **Ship**. Click **Clear** to clear the check boxes. The status of the order will change to shipped, and is now considered a completed order.

This feature is a part of the Shipping Manager. To facilitate modularization and security, no pricing or customer profile information is available from this area unless customized to do so.

Pending Orders by Supplier

Shown is a list of all customer orders that are pending broken out by supplier. The list defaults to show all suppliers, but you can select any supplier from the drop-down list. For each supplier, the reason the order is pending is shown.

♦ To review an invoice, click the order date. Please note that only line items for the specific supplier are shown.

♦ To review the customer profile, click the customer's name. You must have authorization to access the Customer Manager to utilize this feature.

Orders Pending with Partial Shipments

Shown is a list of all customer orders that are pending because only a portion of the quantity ordered for an item was actually shipped.

♦ To review an invoice, click the order date.

♦ To review the customer profile, click the customer's name. You must have authorization to access the Customer Manager to utilize this feature.

Order Adjustment

This page allows you to update the quantities ordered for an existing order that has not been completed. To adjust the order, edit the **Quantity** field, and click **Submit**.

Completed Orders Search

To create a list of orders that have been completed (shipped):

1 Select a method for searching — by **Ship Date** or **Order Date**.

2 Choose an option for either Predefined Date Ranges or a Custom Date Range by clicking the appropriate button. You may choose to search by order date or ship date.

3 For a predefined date range, choose a selection from the drop-down list.

4 For a custom date range, enter start and end dates in a MM/DD/YYYY format.

5 Click **Go** to view the list or click **Reset** to clear the entries.

The list of Completed Orders provides the invoice date, invoice number, customer name, amount of the invoice and a link to the packing list.

♦ To view the details for an invoice, click the invoice date and the Invoice page will appear.

♦ To view/update a customer, click the customer name.

♦ To view the packing list, click **PL**.

Credits Search

To create a list of customer credits:

1 Choose an option for either Predefined Date Ranges or a Custom Date Range by clicking the appropriate button. You may choose to search by order date or ship date.

2 For a predefined date range, choose a selection from the drop-down list.

3 For a custom date range, enter start and end dates in a MM/DD/YYYY format.

4 Click **Go** to view the list or click **Reset** to clear the entries.

To review the credit, click the credit date.

To review the invoice, click the invoice number.

To review the customer profile, click the customer's name. You must have password authorization to the Customer Manager to access this feature.

Credits List

This page shows all credits within the date range selected.

Credit Date
To view the credit issued, click the date. From the credit view, you have the option to view the affected invoice by clicking the Invoice Number.

Invoice Number
To view the affected invoice, click the Invoice Number. From this location you can go directly to Issue A Credit.

Customer Name
To view the Customer Profile, click the Customer Name. You must have password authorization to the Customer Manager to utilize this feature.

Credit

This page shows the details of a credit selected from the Credits Search Results List.

View Order by Tracking or History Number

To search for a specific order, enter the tracking or invoice number and click **Go**. Doing so will take you to the order invoice.

From this page you can format an invoice for printing, issue a credit, view all outstanding credits against this invoice, or delete the invoice. The latter two options are only available for completed orders.

The Invoice page is also available from running one of the Pending Order reports, or the Completed Orders report.

Invoice Page

From this page you can format an invoice for printing, issue a credit, cancel an invoice, view all outstanding credits against this invoice, or delete the invoice. The two latter options are only available for completed orders.

♦ **Printer Friendly Version**: click to print the invoice. Another window will appear that you can print.

♦ **Adjust Invoice** (pending orders only): click to make an adjustment to this invoice. See Order Adjustment (page 32) for more information.

♦ **Cancel** (pending orders only): click to cancel the order.

♦ **Issue Credit** (completed orders only): click to issue a credit toward this invoice. See Issue a Credit (page 34) for more information.

♦ **Credits Against This Invoice** (completed orders only): click to view any credits against this invoice. A listing of all credits made against this invoice appears.

♦ **Delete Invoice** (completed orders only): click to delete the invoice. You will be prompted to confirm this action. Click **Yes** to delete the invoice.

Issue a Credit

To issue a credit, you must first view a completed order. From there, click **Issue Credit**.

You will be brought to a Store Credit Form that shows the invoice date, invoice number and the method of payment to which the credit will be applied (unless you select the **Issue Store Credit** option. Beneath this information is a display of the invoice with a check box next to each line item. The default is to credit the entire invoice.

Prior to issuing a credit you may want to check to see if any credits have already been issued against this invoice. To do this, click **Credits Against This Invoice** from the invoice detail.

Line Item Credit
To issue a credit for a line item, leave this box selected. If this item is not being credited, clear the box.

Credit Shipping Charges
Select to credit shipping charges. You may also choose to credit partial shipping charges by entering a different number. The default for this feature is to not credit shipping charges.

Return Products to Inventory
Select to return products to inventory. This is optional since you may be returning the items to the manufacturer. When serialized products are returned to inventory, the last serial number on the invoice will be replaced first, with others following in that order if applicable.

Issue Store Credit
Select this check box to issue a store credit, rather than issue the credit toward a method of payment.

Credit Note
Enter any text you would like to appear as a note on the credit.

Credits Against Invoice

This page shows any credits already issued against the selected invoice. You will be brought to a page that shows the date of any credit issued, invoice number, customer name, and credit amount.

Credit Date
To view the credit issued, click the date. From the credit view you have the option to view the affected invoice by clicking the Invoice Number.

Invoice Number
To view the affected invoice, click the Invoice Number. From this location you can go directly to Issue Credit.

Customer Name
To view the Customer Profile, click the Customer Name. You must have password authorization to the Customer Manager to utilize this feature.

Payment Processor Details

This page lists the responses from the payment processor for a specific order. The information here is a direct logging of what is provided by the payment processor. For more information on the meanings of each field, please refer to your payment processor's materials.

Date

The date of the transaction. This date reflects the time of the local payment processor's Administration Server.

Txn ID

The transaction ID assigned by the payment processor for the order.

Price

The total amount that was authorized.

Auth Code

The authorization code for the amount.

AVS

The address verification code for the order.

Ref Code

The reference code assigned by the payment processor for the order.

Shipping Manager

The Shipping Manager provides access to orders that are ready to be shipped.

♦ Priority Orders Ready for Shipping (page 32): displays a list of the priority orders ready for shipping.

♦ Orders Ready For Shipping (page 32): displays a list of all orders ready for shipping.

Customer Manager

The Customer Manager provides access to customer profile information and order history.

- ♦ Add Customer Profile: add a new customer. You can also import information for multiple customers using the Import/Export feature (click **Support** to access this feature).

- ♦ List Customers: view and update customer information. To locate a customer profile, type the starting characters of the customer's last name and click **Go**.

- ♦ Customer Groups: view, add and update customer groups. To locate a customer group, type the starting characters of the group name and click **Go**.

- ♦ Store Credit: issue store credits. To issue a store credit, type the starting characters of the customer's last name and click **Go**.

- ♦ Custom Fields: create custom customer fields.

Add/Update Customer Profile

This is where customer information is added and updated. The customer number is unique and, to prevent errors, cannot be changed.

Basic Information

Enter the customer's name, password, address and phone number and e-mail information.

Order Limit
Customer order limit. This field will override the store order limit, whether it is set lower or higher than that limit.

Custom Information

Collect up to six additional types of customer information. Custom field titles are updated through the Customer Custom Fields page.(Pro version *only*)

Billing Information

Select type of payment the customer is using. These will only appear if you define methods of payment in the Store Manager, Billing Preferences.

Credit Card
Select the card from the drop-down list, enter the card number and its expiration date. Enter the date in a MM/YY format.

Other Information

Customer Group
If this customer is a part of a group that has already been defined, select that group from the drop-down list. *(Customer Plus Module only)*.

Sales Person
Select the customer's sales person from the drop-down list. The default is **None**. *(Pro version, Sales Manager Module only)*

Resale Number
If the product is to be resold, enter the customer's resale number. If a resale number is on file and the customer indicates at purchase time that the purchase is for resale, no tax will be calculated. If no resale number is entered and the customer indicates the purchase is for resale, the system will generate a message stating that a resale number is required. *(Pro version only)*

Allowed to purchase products requiring special authorization
Select this check box if this customer is allowed to purchase products requiring special authorization. *(Pro version only)*

Click **Submit** to save the information. Click **Clear** to discard it. To remove this customer from the list, click **Delete**.

Delete Customer Profile

When you delete a customer profile, it is gone forever — or at least until the customer purchases another product. Use this feature with caution.

When a customer is deleted, a confirmation page is shown confirming that this is the customer you want to delete. Click **Yes** to delete the profile.

A customer profile cannot be deleted if there are any invoices associated with the customer. You must first cancel any pending orders or delete the completed orders before you can delete the customer.

Customer List

This page displays a list of the customers fitting the criteria on which you searched.

♦ To view or update a customer's profile, click their Name.

♦ To view a customer's order history, click their Order History date.

♦ To add a customer, click **Add Customer**.

Customer History

(Pro version only)

This page lists all orders placed by the selected customer. The list shows the invoice date, activity (credit, sale), invoice number, invoice total and status (ordered, shipped, etc.).

♦ To view an individual invoice or credit, click the date.

♦ To view the Customer Profile, click the customer name. If you would like to send the customer an e-mail, click their e-mail address.

♦ To view the customer's product ordering history, click **Product History**.

Customer Product History

(Pro version only)

This page lists all products ordered by the customer, including quantities, purchase price and total dollars spent on each product.

The list is sorted alphabetically by product.

Customer Groups

(Pro version, Customer Plus Module only)

Customer Groups are used to allow you to apply discounts across groups of customers.

This page displays a list of the existing groups.

♦ To update a group, click its name in the listing.

♦ To add a group, click **Add Customer Group**.

Add/Update Customer Group

This page allows you to add or update a Customer Group.

Group Information

Group
Enter a name for the group.

Description
Enter a description for the group.

Discount Information

If this group is not eligible for special discounts, select **No Discount**.

If this group is eligible for a discount as a percentage off the retail prices, select **Percent Discount off Retail**, enter the percentage discount (for example, 0.05 = 5%), and if true, select **Apply Discount in Addition to Any Sale**.

If this group is eligible for special pricing that is a percentage above cost, select **Cost plus percent** and enter the percentage.

Store Credit

(Pro version only)

Store Credit can be given outside of crediting an invoice by using this feature. An example would be if you are a used CD store and you give store credit when someone sells a CD to you. Another use would be to give new customers a credit for visiting your store.

When a customer with store credit makes a purchase, store credit is applied on the total amount of the order. The store credit balance is decremented at this point. The amount used appears on the invoice.

To issue a credit, locate the customer you want to credit and then click their name. You will be brought to a Store Credit form that shows some basic information about the customer and the current store credit balance for the customer.

Store credit appears on the Credit list without an invoice number.

Apply Store Credit

(Pro version only)

Store Credit to Apply
Enter the amount of credit you want to give. To take away credit, enter a negative number.

Credit Note
Enter any text you would like to appear as a note on the credit.

Customer Custom Fields

(Pro version only)

Custom Field Titles

You can assign a title to each of the eight custom text fields that are associated with each customer. These titles will be shown wherever customer information is shown in the Administration area.

Click **Submit** to save or click **Clear** to discard the entries.

Sales Manager

(Pro version with Sales Manager Module only)

The Sales Manager provides access to sales leads, sales people, sales managers, and sales reports.

Sales Leads

♦ View Sales Leads: view a list of all sales leads.

♦ Customize Sales Leads Fields: create custom fields to gather lead information.

♦ Customize Sales Leads Rules: create rules to assign leads to salespeople.

Sales Team

♦ View Sales Team: view and update information regarding salespeople.

♦ View Sales Managers view and update information regarding sales managers.

♦ Add Sales Manager: add a new sales manager.

♦ Add Sales Person: add a new salesperson.

Sales Affiliates

♦ Sales Affiliates: view, update and add sales affiliates.

Sales Reports

♦ Sales Reports: generate sales reports.

♦ Sales Target Reports: generate sales target reports.

View Sales Leads

This page provides a list of all open sales leads. You can click the lead to modify or view the lead information.

Listed are the lead names, their primary product interest, the date they were added to the list, and the sales person assigned to the lead.

To delete a sales lead, select the box next to it and click **Delete**. To clear the boxes, click **Clear**.

Sales Lead

This page allows you to view and update information regarding a sales lead.

Lead Information

Enter the customer's name, address and phone number and email information.

Date Submitted
Date and time the lead was submitted by the customer.

Customer responses to the custom check boxes as created in the Lead Custom Field area.

Custom Text Fields

Customer responses to the custom fields as created in the Lead Custom Field area.

Sales Person

Assigned To
If this is a new customer, select a sales person from the drop-down list and click **Go**. All existing customers will be automatically assigned to their existing sales person, if any.

Lead Custom Fields

This page allows you to create custom fields to gather lead information.

Custom Checkbox Titles
You can assign a title to each of the six custom check box fields. These titles can be used in the Sales Lead template and will be shown wherever lead information is shown in the Administration area.

Custom Field Titles
You can assign a title to each of the six custom text fields. These titles can be used in the Sales Lead template and will be shown wherever lead information is shown in the Administration area.

Click **Submit** to save or **Clear** to discard the entries.

Lead Assignment Rules

Use this feature to define how to assign a salesperson to new leads. Existing customers are automatically assigned to their existing sales person, if any.

Current Rules

Listed are states previously entered. To remove one, select the box next to it and click **Remove**. To clear the checks, click **Clear**.

Add Rule

Enter the standard postal abbreviation for the state or province (two capital letters), and select a sales person from the drop-down list. A sales person must be added to be included in the list.

Click **Submit** to add the rule to the list, or click **Clear** to discard the rule.

View Sales Team

This page provides a list of all managers and sales people. You can click any sales person link to modify or view their profile.

Listed are the names of the sales people, their managers, and the manager's region.

♦ To remove a sales person, select the box next to it and click **Delete**. To clear the boxes, click **Clear**.

♦ To update a sales person or sales manager profile, click their name.

♦ To add a new sales person or sales manager, click the appropriate link.

View Sales Manager

This page provides a list of all managers. You can click any sales manager link to modify or view their profile.

Listed are the names of the sales managers, and their region.

♦ To remove a sales manager, select the box next to it and click **Delete**. To clear the boxes, click **Clear**.

♦ To add a new sales manager, click the **Add Sales Manager** link.

Add/Update Sales Manager Profile

Use this page to add or update sales manager information.

Basic Information

First Name/Last Name
The sales manager's first and last name.

Region
Enter a region for the sales manager.

Sales Targets

Monthly
The total dollar sales target for a month.

Quarterly
The total dollar sales target for a quarter.

Annually
The total dollar sales target for a year.

Click **Submit** to add the sales manager, or click **Clear** to start over.

Add/Update Sales Person Profile

Use this page to add or update a sales person profile.

First Name/Last Name
The sales person's first and last name.

Initials
Enter the sales person's initials. Some accounting and contact software use initials to identify the sales person. This information is included in the exports.

Manager
Choose a sales manager from the drop-down list to associate with this sales person.

Sales Targets

Monthly
The total dollar sales target for a month.

Quarterly
The total dollar sales target for a quarter.

Annually
The total dollar sales target for a year.

Click **Submit** to save the sales person, or click **Clear** to start over.

Sales Affiliates

Sales Affiliates are other businesses, individuals or organizations to whom you agree to pay a small percentage of the item's sale price if they refer a customer to your store.

♦ To locate an affiliate profile, type the starting characters of the affiliate's name and click **Go**. To list all affiliates, just click **Go**.

♦ To add an affiliate, click **Add Sales Affiliate**.

Add/Update Sales Affiliates

Use this page to add or update an sales affiliates.

Basic Information

Enter the affiliate's name, address, phone, email and web information.

Contact
The name of the contact representing the affiliate.

Resale Number
If this affiliate is eligible to purchase products without having sales tax applied, they must have a resale number entered here.

Commission Rate
If applicable, enter the commission rate this affiliate is to receive.

To save your changes, click **Submit**.

Sales Reports

To create a report:

1   Select the report from the drop-down list.

2   Choose a predefined date range or enter a custom date range.

3   Click **Go** to generate the report.

Sales Reports

Total Sales by Sales Person
This report shows sales by sales person for the date range selected and includes: Sales Person, Sales Manager, Number of Orders and Total Sales Dollars. Click the sales person's name to view their Sales By Customer. Click the customer's name in the Sales By Customer report to view the customer's order history during the date range selected. From this location you can link directly to the customer's complete order history.

Click the sales manager's name to view each sales person assigned to the selected sales manager, number of orders for each and total sales dollars.

Total Sales by Sales Manager
This report shows sales by sales manager for the date range selected and includes: Sales Manager, Total Orders and Total Sales Dollars.

Product Sales by Sales Person
Select a sales person and click **Go**.

This report shows product sales by sales person for the date range selected and includes: Product Name, SKU, Quantity Sold and Total Sales Dollars.

Category Sales by Sales Person
Select a sales person and click **Go**.

This report shows category sales by sales person for the date range selected and includes: Category, Sub-Category, Quantity Sold and Total Sales Dollars.

Affiliate Sales Summary
This report displays total sales and commissions per affiliate for the date range selected and includes: Affiliate, Sales, and Commissions.

Affiliate Sales by Affiliate
This report displays itemized sales by Sales Affiliate for the date range selected and includes: Product, SKU, Quantity, Sales and Commissions. To select a specific affiliate, select it from the drop-down list on the report results page.

Sales Target Reports

Sales Target by Sales Person

This report shows sales target by sales person and includes: Sales Person, Sales Target and Total Sales Dollars for the selected predefined date range.

Sales Target by Sales Manager

This report shows sales target by sales manager and includes: Sales Manager, Region, Sales Target and Total Sales Dollars for the selected predefined date range.

Report Manager

To create a report:

1 Click one of the reports links.

- ♦ Executive Reports

- ♦ Product Reports

- ♦ Category Reports

- ♦ Sales Reports

- ♦ Inventory Reports

2 Select the report from the drop-down list.

3 Some reports require you to choose a specific product or category. If so, select the item from the drop-down list.

4 Choose a predefined date range or enter a custom date range.

5 Click **Go** to generate the report.

Executive Reports

Best Sellers
This report lists the top 20 selling products in order of quantity. The report includes Product Name, Manufacturer, Sales Dollars and Quantity Sold.

Worst Sellers
This report lists the 20 worst selling products in order of lowest to highest sales. The report includes Product Name, Manufacturer, Sales Dollars and Quantity Sold. In order to be placed on the report, a minimum of one unit of product must have sold during the report period selected.

Customer Top 20
This report lists your 20 best customers in order of sales dollars. The report includes Customer Name, Sales Dollars, and Number of Orders Placed.

Order/Visit Ratio
This report highlights the percentage of visits resulting in an order, the average order amount, profit margin, number and value of abandoned carts, new customer sales and returning customer sales.

Note: a "visit" is defined as a search conducted by a unique IP address. If that IP address conducts multiple searches in one day, that is only counted as one visit.

Most Visited Products
This report highlights the top 20 most visited products in your store. The report includes Product Name and number of page views.

Least Visited Products
This report highlights the top 20 least visited products in your store. The report includes Product Name and number of page views.

Search Summary

This report gives you insight into your customer's searches and whether they were successful or not in finding the information they wanted. It includes the number of successful and unsuccessful searches, and lists the category, product name, manufacturer, keyword and number of hits. You can use these reports to identify the products for which your customers are searching, and also what they are *not* finding.

Product Reports

Product Statistics

This report shows individual product statistics, including: Units Sold, Dollar Sales, Cost, Profit Margin, number of Product Page Views and number of times the product was Placed in a Cart.

Category Reports

Category Statistics

This report shows sales information by category, including: Units Sold, Total Sales, Total Cost and Profit Margin. Note: if you have placed products in multiple categories, they are counted in each category.

Sales Reports

Sales By Product

This report shows sales by product for the date range selected, and includes: Product Name, Manufacturer, Sales Dollars and Quantity Sold. Products are listed alphabetically.

Sales By Category

This report shows sales by category for the date range selected, and includes: Category Name, Sales Dollars, and Quantity (number of products sold in that category). Categories are listed alphabetically. If products are placed in multiple categories, they will be counted in each category.

Sales By Manufacturer

This report shows the sales by manufacturer for the date range selected, and includes: Manufacturer Name, Total Sales Dollars, and Quantity (number of units sold from that Manufacturer). Manufacturers are listed alphabetically.

Promotions

This report is a sales summary of your special promotions for the date range selected and includes: Promotion Code, Promotion Description, Percentage Discount, Sales Dollars and Quantity (number of orders placed using that promotion code).

Sales Tax

This report is a summary of the sales tax you have collected for the date range specified. It includes: State, Sub-Total Sales Dollars (excluding tax and shipping) and Sales Tax collected.

Sales by Customer

This report displays sales by customer and includes: Customer, Customer Number, Location and Sales. To narrow the search results, select a product category, manufacturer or minimum sales amount.

Sales by Customer Group

This report displays sales by customer group, and includes: Customer Group, Description, Sales and Quantity.

Cost of Inventory

This report shows the cost of inventory, by individual product, or all products. It includes: Product Name, Quantity, Unit Cost and Total Cost. You must enter a cost in the Product Manager for this report to work.

Support

The Support page provides tools to help you maintain your store.

♦ Templates: modify the templates that control the look and feel of your store.

♦ Import/Export: extract information from your store's databases for use in external applications. In addition, you can import product information directly into the store.

♦ Upload Images: upload your own images to the store.

♦ Server File Management: manage files located in your store directory on the server.

Templates

Templates control the look and feel of your store. This section provides tools for modifying the templates and importing your own templates. In addition, help is available for each template.

♦ Overview: provides an overview on how templates work and how to make changes to them.

♦ Template Editor: provides a basic editor to make changes to a template.

♦ Template Assistant: assists you in setting up your store templates.

♦ Template Maintenance: import and export templates, as well as set a baseline for all your templates, or reset all of them to their original format.

♦ Help: provides detailed help for every template.

Template Editor

The Template Editor provides a basic editor to make changes to a template.

Note: this is a very limited editor. For complex changes it is recommended that you create your templates in a more robust HTML editing environment and import the HTML file.

You have four options for saving and undoing your edits:

♦ To save your changes to the database, click **Submit**.

♦ To cancel the changes you've made, click **Cancel**.

♦ To save your current changes as a "baseline" (meaning, you can return the code to this state should you make any additional changes), but not to the database, click **Set Baseline**.

♦ To return the code to the last baseline you set, click **Baseline**.

To change the view of the template editor:

♦ To show more code on the page, click **Expand**. The box containing HTML code will become longer so that you may view more code without scrolling.

♦ To wrap the code (instead of the code running past the right of the box), click **Wrap**

Template Assistant

The Template Assistant assists you in setting up your store templates. Use the assistant to choose a graphical look and feel for your store. You can further modify your templates by using the Template Editor after the assistant has done the initial set up.

Be sure to select the Template Set you want to modify in Store Manager before running the Template Assistant.

Note: running the Template Assistant will overwrite any edits you have made to these templates.

1   Choose a graphic style: The first step in creating the look and feel of your store is to pick an overall graphic style. This will be used as the master template for all your pages.

2   Choose a storefront page layout: The storefront is the welcoming page of your store.

3   Choose a catalog list layout: The catalog list page is where your products are listed, either by clicking a category or by searching your catalog.

4   Choose a product detail page layout: The product detail page shows all the specifics for a product and allows the customer to place a product in their cart.

5   Choose your fonts and colors: Use the drop-down lists to select the fonts, sizes and colors you wish to use in your store.

6   Confirm your selections: To change a selection, click the element you want to change. Click **Confirm** to save the design of your templates, or **Cancel** to continue.

Template Maintenance

Use this page to import and export templates, set a baseline for all your templates, or reset all of them to their original format.

Import

Imported templates replace the existing template and are immediately live. Use this function with caution. You can import any text file (.htm, .txt, etc.).

To import a template:

1   Select the template from the drop-down list, and then browse to the file you wish to import on your local drive.

2   If this is a new template, also add a name and description for the template.

3   Click **Import** to import the file.

Export

To export a template:

1   Select the template you wish to export from the drop-down list

2   Select the platform to which you will be exporting the file from the drop-down list.

3   Click **Export**. A **File Download** window will appear.

4 Select **Save this File to Disk** and click **OK.**

5 Browse to the location on your local drive to which you would like to download the template, and click **OK**. The template will begin downloaded.

6 After the template has been exported, another window will appear telling you that the download is completed.

Set Baseline

Saves a baseline for *all* of your templates. This action is *not* reversible. To set a baseline, type "yes" and click **Set Baseline**.

Reset Templates

Resets your templates to the last baseline. This action is *not* reversible. To reset your templates, type "yes" and click **Reset Templates**.

Import/Export

Import/Export allows you to extract information from your store's databases for use in external applications. In addition, you can import product information directly into the store.

Export

Export creates a comma separated (.csv) ASCII file of your data that can be imported into desktop applications such as Excel and Access.

To export a table:

1 Select a table to export from the drop-down list.

2 Select a target platform from the drop-down list.

3 Click **Export**.

   ♦ Certain tables can be filtered by date ranges or categories — if so, you will be prompted with another page at this time. If this is a date page, select a pre-defined date range, or enter a custom date range. If you do not wish to limit your export by date, select a pre-defined date range of *All*. If this is a category page, select a category from the drop-down list, or select *All* to export all categories.

   ♦ If you selected the **Quick Books format** check box (for Customer or Order tables), the **Export for Quick Books** page will appear. Enter the custom Quick Books categories and accounts information.

   ♦ After selecting any filters or Quick Books options, click **Export**.

4 The **Export Results** page appears. To view the status of the export, click the status link provided.

5 When the export is complete, click the link to download the file to your computer with the extension of ".csv" or ".txt".

Import reads a comma separated (.csv) ASCII file from your local computer and imports it into the product table. In addition, it will automatically update category links and create new categories if they do not already exist. You can import up to 5000 records at a time.

To import a table:

1 Select the table to which you wish to import the file from the drop-down list.

2 Browse to the file you wish to import.

3 For Products, select a method for updating product inventory by selecting one of the buttons.

4 Click **Import**. If you have a large file, this process may take a while.

This option allows you to create a static page that the search engines can find and index to better market your store.

Export Static Page

This page allows you to create a static page that the search engines can find and index to better market your store.

Because StoreSense is a dynamic catalog, the "spiders" that search engines send out to categorize the Web may not find any of your store pages. One way to get noticed is to create a static page that they can use to find your site. You can create your own or use this feature to help you get started.

HTML Page
The name of the page to create in the root folder of your store. This should be something the spiders will find like "index.htm" or "default.htm". Be careful not to give it the same name as an existing file because the existing file will be overwritten.

Page Title
The title for the page. It appears in the title bar of the browser. Some search engines use this, some don't.

Meta Description
A brief description of your store. Again, some search engines use this, others don't.

Include Categories
Select this option to put all category names into the page.

Include Products
Select this option to put all product names into the page. If you have a lot of products, then this may not be appropriate, as it will create a huge page.

Place in Meta Tags
Select this option to place the categories and/or products inside Meta tags. Some search engines look in Meta tags and some don't.

Place in Page Body
Select this option to place the categories and/or products inside the main body of the page.

Upload Images

This page allows you to import images into your store. You can upload both single image files, and archived zip files. After being uploaded, archived images will automatically be uncompressed into the appropriate directory and the archive file will be deleted.

To upload an image or an image archive:

1   Select the image type you are uploading from the drop-down list.

2   Enter the file and path name, or click **Browse** to browse to its location on your local drive.

3   Select the type of file you're uploading from the drop-down list.

4   Click **Upload**.

Server File Management

This page allows you to view, manage and move files located in your store directory on the server.

There are three content areas:

♦   Store Content Area: Contains all files that can be viewed via a browser, such as static HTML pages and images.

♦   Store Data Area: Contains all files that either cannot or should not be viewed via a browser, including store configuration and log files.

♦   FTP Area: If your site administrator has provided you with an FTP directory on the server that is outside of your Store Data Area, this link will provide you with access to that FTP area. The site administrator must configure your store with access to your FTP area using StoreSense System Administration.

To open a folder, click its link.

To go back to the folder containing the current folder, click **Parent Directory**.

To delete a folder or file, select the folder or file and click **Delete**. Deleting a folder will also delete any folders and files contained within it.

To copy a folder or file:

1   Select the folder or file and click **Copy**. The folder(s) and file(s) are placed on the clipboard.

2   Go to the folder into which you want to copy the folder or file and click **Paste**.

To move a folder or file:

1 Select the folder or file and click **Cut**. The folder(s) and file(s) are removed from their current location and are placed on the clipboard.

2 Go to the folder in which you want to move the folder or file and click **Paste**.

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