Administrator's Guide

Revised: 10/1/2015

This guide was written for multiple versions, with varying features.
Some features might not be present in your Storefront or Admin

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Getting Started

After the Storefront and Admin have been installed, you will want to start customizing the storefront elements. Before jumping right in, be sure to explore the Admin thoroughly and understand how you can setup items, categories, custom pages, etc. There is no right or wrong way to proceed, but you should put considerable thought into it, so you end up with a well-organized storefront.

Below is a checklist of the most common "First Steps"

- Secure access to the Admin by creating Administrative usernames and passwords; see "User Security" under the "Advanced" tab.

- Enter your Domain Name (URL); see "Web Address (Domain/Url)" under the "Settings" or "Advanced" tabs.

- Activation (contact your system administrator or web master for assistance if you are being asked to activate).

- Create Categories.

- Create Items/Products and assign them to your categories.

- Upload primary images and logos; see "Image Upload" under the "Design" tab.

- Using the built in "Content Editor", insert your custom graphics and customize the different storefront sections. See "Page Content" and "Page Layout" under the "Design" tab.

- Configure the email settings and default messages, see "Email" under the "Settings" tab.

- Configure the checkout flow, order, inventory, shipping, tax, and payment settings. See the "Settings" tab.

Setup Basics

User Security

Upon entering the Admin for the first time, you may see a warning message stating that you have not set up any users. We recommend that you create at least one admin user right away. From the main Admin menu, choose User Security under Advanced section.

Press the "Add New User" button to create a new the Admin user.

Username
The user name should be unique to the User; this should be a single word with no spaces. For example, if your name is John Smith a good username would be "johnsmith" NOT "john".

Password
Be sure to create a password that is difficult for someone to guess, this must be a single word with no spaces. It is strongly recommended that you use unique password that you have not used elsewhere, for example do not use the same password that you have used with other logins for your web server.

User Level
There are several user levels. Level 1 users can access all areas in the Admin, whereas a Level 2 user is restricted and cannot access some "Settings" and "Advanced" areas.

URL (Domain Name)

Under Settings, see "Web Address (Domain/Url)" to configure the domain name (URL).

URL
In the URL field you must enter your regular (non-secure) URL. You need to enter the actual URL to where the Storefront is. For example, http://www.yourdomainname.com/

The URL you enter in this field must begin with "http://" and must end with "/". If you are still developing the storefront, and have a dedicated IP Address you may enter an IP address, see "Development Mode" in this guide for more information.

Secure Domain/Url
See "Secure Pages (https)" section further in this documentation. Enabling your Secure Domain/Url (installing an SSL Certificate) is optional at this point, for example if you are still just developing your storefront.

Test URL
It is strongly recommended that you Test the URLs before you save them. Using the 'Test' button located to the right of the field, you can see if you entered the correct URL. When pressed, a new window will open and you should see the words "Test Passed" in bold lettering. If you get a message such as "The resource cannot be found", than the URL you entered is incorrect. You will need to correct the entry and Test again before saving.

Activation

Once you have entered & tested the URL, you may need to activate this software. Before you activate, some features will not work or will display a "demo mode" message.

NOTE: If you are not ready to activate, see the "Development Mode" below.

To Activate, you will need the Account number & password that was assigned to you by the company that installed this Administrator.

From the "Home" page in the Admin, click the "Activate" button to begin. After you enter your Account

number and Password, the Admin will verify that you have a valid license and that license will be assigned to your URL/Domain. Because the license is based on your URL, you should not activate the Storefront until you have tested the URL you entered on the Web Address (Domain/Url) settings page.

NOTE: If you need to change the URL in the Admin, this will invalidate the license that you already obtained, and may require that you re-activate. We do NOT recommend changing the URL in the Admin once you have activated. If you do not see an "Activate" button than your Storefront has already been activated or is in Development Mode.

Development Mode

If you are not ready to activate, for example your site is not Live yet and you want to setup or test without activating it, there is a built in development mode. By changing the URL in the Admin's URL setup, you can trigger this mode.

The Admin will not require activation if the URL you use meets any of the following:

1. The URL is any IP address, for example "http://123.456.789.123/".
2. The URL is a Local Area Network server or computer name, for example "http://servername/" or "http://computername/" or "http://localhost/"

NOTE: You may also want to turn on the "Store Closed" mode, so that your Storefront pages are not visible. Go to "Settings" then click "Checkout" to adjust the Storefront Access settings.

Title / Keywords

The Storefront allows you to enter some "Meta" Tag information, which is embedded into your web pages for search engines. The Storefront is pre-optimized for the major search engines; however you should enter your own Titles, Keywords, and Descriptions where necessary.

Store Name

This field is mostly for internal purposes, this is not to be confused with the Website Title. This is a required field, and should not be more than 25 characters and should not include any unusual characters or symbols.

Website Page Title

This is the "Title" Meta tag that is placed in the HTML "head" tag of each web page. You should keep the length under 100 characters.

Site Description

This is the "Description" Meta tag that is placed in the HTML "head" tag of each web page. The site description should brief (no more than 255 characters) and an accurate description of your online store.

Search Engine Keywords

This is the "Keywords" Meta tag that is written into the HTML "head" tag of each web page. Here you can enter keywords that you think web surfers would search for at a search engine when looking for your site. Keywords may be a single word or multiple-word phrases. The keywords should be separated by commas. You should not exceed 255 characters.

Category & Custom Page Meta Tags

The above mentioned Meta Tags are general; other Meta tags can be entered under each "Category" and "Custom" page. When you edit the Category or Custom page, you can change the Meta Tags for those pages. If you do not enter Meta Tag information under Categories or Custom pages, the main tags (above) are used on those pages.

Item Page Meta Tags

Item detail pages also have Meta Tags, but these are generated automatically for you. The item's Name, Item Number, and Short Description are used to create relevant Meta tags.

Item/Product Setup

The Storefront can be configured with an unlimited number of products/items. From the main menu in the Admin under "Items", you can select "Show All" to view all items. There are also a few shortcuts to "Sale" and "Featured" items. At any time you can use the search feature to locate items by number, or name.

To create new items, click on "Add New".

Item Fields

Below is a description of some of the commonly used fields.

Item No (Sku)

The item number field is required for each item. You should keep it short (8 characters if possible), as long item numbers will adversely affect the layout (the look) of many of the category pages.

Name

The item name should be kept short as well, although you can enter names up to 255 characters in length. Keep in mind this may be used by search engines, so make sure the name is relevant and accurately portrays the product.

Active

You must choose "Yes" in this field to make the item visible in your storefront. You can use this to turn items on and off as needed. When "No" is selected the item will not be visible in the storefront, nor can anyone search for it.

Featured

Featured items are normal items, in regular categories, that you wish to give extra promotion (perhaps hot sellers, or sale items). Items that are flagged as "featured" appear on the "features" page which is accessible from the main menu in the storefront. They are also randomly displayed throughout your storefront, determined by your "Page Layout" settings.   See the "Design" tab of the Admin.

Price

This is the default, regular price per item (each). It appears throughout the storefront, but can be made invisible by checking the "Hide Price" checkbox. Also see the item's "Discounts" tab, for additional price fields and other discount options.

Sale Price

The sale price is only used when you select "Yes" in the "On Sale?" field. When an item is placed on sale the sale price will appear below the regular price (which will have a line drawn thru it.)

On Sale

This field simply enables, disables the sale price. Check "Yes" to place an item on sale.

Hide Price

When you check this checkbox the price (including sale price) is hidden from your web visitors. Also, the "Buy Now" button is removed. This is useful if you wish to have items that are catalog only (not for sale). Or, you can use this if an item is out of stock.

Taxable

You can specify if an item is taxable, or tax exempt. Depending on this setting, during checkout tax may or may not be charged on the item. See "Taxes" help topic for setting up taxes.

Default Qty

This field is used to designate the default "add to cart" quantity. If you leave it blank, it will automatically be set to one (1). This quantity must be a whole number, decimals are not allowed.

Weight

This field is used to set the weight for the item. The weight is used for calculating shipping when necessary.   For lbs & ounces, you can switch the Storefront to function with two weight fields, see the "Inventory" settings page.

Optional Shipping Charge

If you want to charge shipping on a per item basis, you can specify a shipping charge here. This charge will only be used when you have setup a Custom Service and selected "Per Item Shipping" as the Rate method. See Shipping in this Guide for more information.

Current Inventory

This is the available quantity, how many of this item you have. Each time a customer purchases an item in your online store, inventory is adjusted accordingly. See Inventory settings for more on enforcing and managing your inventory.

Short Description

The short description appears on the "Category" detail page, when an item is associated with a category for example and someone is viewing that category. This should be kept relatively short, as a very long short description will lead to very long Category pages. Keep in mind this may be used by search engines, so make sure this description is relevant to what is on the Item's page.

Detailed Description

The detailed description is edited using the built-in HTML or Content editor, which provides unlimited formatting options. To edit the description, click on the "edit" button. You can insert additional images or graphics into the description, creating a professional brochure like item page. The detailed description has no length limitations, however if you are inserting images or tables, we recommend that the images do not exceed 350 pixels in width (to prevent the page from being stretched). You can also edit the raw HTML code if you are experienced with HTML; use the second edit button shown.

Display Options

Your item's Detailed Descriptions (the item detail page), can be set to display in one of three ways:

-Display Normally

-Only show Detailed Description
The item's name, item number, and price are not shown, only the Detailed Description is show, however you customer's can still purchase this item.

-Only show Detailed Description
When this is selected, only the Detailed Description is shown, like above, however they Buy Now buttons are hidden, so the item cannot be purchased.

Count Page Visits

By checking this box the Storefront will count each unique visit to the item's page (like a page counter). This is an internal page counter and cannot be seen by your web visitors. The number shown as "Page Views" is the current total number of visits; you can reset this by entering zero. This feature can use up valuable server resources and should be used sparingly. We only recommend enabling this for a few items at time that you wish to track. As an alternative, try using Google Analytics, which is an invaluable tool for tracking activity on your website.

Thumbnail (small) Image

The thumbnail, or small image, appears on the Category detail, Features, and search pages, or when the item appears somewhere in the Storefront as a Featured or Related item. You can enter the filename of any image that is located in the "images" directory on your web server (Example: picture.jpg), or you can

enter the URL to the image if it's located somewhere else on the web, for example "http://somesite.com/image.gif". Unless you are entering a URL, do not use "/" or "\" characters in the filename.

This image will be automatically resized in the browser to the dimensions you entered on the Image Size settings page, see "Image Sizes" in the Admin in the Design area. However, you should reformat/size your images appropriately before uploading them.

Large Image
The large image appears on the "Item" detail page. You can enter the filename of any image that is located in the "images" directory on your web server (Example: picture.jpg). Or, you can enter the URL to the image if it's located somewhere else on the web, for example "http://somesite.com/image.gif". Unless you are entering a URL, do not use "/" or "\" characters in the filename. We recommend that your image not be larger than 200 pixels in width as it might crowd the page.

This image is not automatically resized, see below.

Resize Large Image
In some cases, your large image might exceed the recommended width or may be too small to fill the page. If you check this resize image checkbox, the Storefront will automatically resize the image in the browser to the dimensions you entered on the Image Size settings page, see "Image Sizes" in the Admin. However, you should reformat/size your images appropriately before uploading them.

No Wrap
This setting will display your large image above the "Detailed Description"; this is sometimes needed particularly if you insert tables or cells into your detailed description. By default (when "No Wrap" is not checked), your detailed description text is wrapped around the image.

Item Type

Regular
Select this type for regular items that are purchased and shipped to customers.

Regular (No Shipping)
Select this type if the item is a regular item that does not require shipping. For example, a membership, service, or other non-tangible good.

Digital Download (No Shipping)

Select this type if the item is a downloadable file, electronic goods, such as Software/Music/E-Books, etc. Then, enter the filename of the download (which you need to upload to your "downloads" folder using your own FTP client software, contact your web host for more on this). When digital download is enabled, shipping will not be necessary for this item. If an order only contains downloadable items, your shoppers will not be given any shipping options.

Also see the "Downloads" settings in the Admin.

Custom Fields (Custom1, 2, 3, etc)
Since every business has different ways of classifying their products, you can categorize items using these custom fields. Users in the storefront will be able to search by these fields. Some popular uses are Manufacturer Name, another part number, or even things like Title/Artist for art, music, etc.

Before using these custom fields, you must enable and name them, see "Item Settings". These fields are not turned on by default.

Category Assignment
You can assign each item/product to as many categories as you wish. To associate an item with a category, click on the "Add Category" button on the item's category tab.

Alternate/Wholesale Pricing

For each item, you can configure 3 different price levels/tiers (3 different sets of prices). Which price a particular customer sees is determined by the price level associated with their account. To enable these additional prices, check the "Enable" box found on the "Discounts" tab of the particular item, and enter both a Regular and Sale price for each level you want to use.

To assign a particular level with a customer, navigate to the Customer's profile in the admin (click on "Customers" or use the Search to locate the customer). Just beneath the customer's address is the option to select which level/tier the customer belongs to. Note: The customer must be logged in to view their prices; prices shown in the Storefront will default to the "normal" price when they are not logged in.

Quantity Based Discounts

You can specify a quantity based discount for each item. Meaning, you can set a different price based on the quantity your customer purchases. So instead of just multiplying the price by the quantity being purchased, you can scale the price, offer a different price/ea according to the quantity they want. Click on the "Discounts" Tab, then click "Add Discount" to create a Quantity range. You can then specify a price based on the quantity range, so if the quantity being purchased falls in that range, this price will override any other prices that were applied. Also see the Discounts/Coupons section in this guide.

Product/Item Photo Gallery

The Storefront allows you to associate unlimited number of images with an item, displaying them in a professional image gallery. Your customers can open the gallery while viewing the main item page.

Primary Images

For each item you can have a primary image and primary thumbnail. These are used on the Item page as well as throughout the Storefront (for example when the item is displayed as a Featured Items or Best Sellers the primary thumbnail is shown). On the item's main page the primary image is shown.

Additional Images

After you associate a primary image and primary thumbnail with your item, you may want to add additional images. These, in additional to the primary image, will be show in the Images Gallery.

Featured Items

Featured Items are items/products in your store that you want to highlight. These can be randomly displayed throughout the store, and on the special featured items page. Specify which items are designated as featured in the item's setup page.

How many to Display

Here you can specify how many featured items will show up at a given time and how they are displayed (how many rows/columns for example). You can specify this for your storefront's Left & Right columns, as well as a different setting for the Middle (main) column.

You can also specify what elements appear with the featured items, for example you do not have to display all of the item's information, you could just show the image, and a buy now button, etc.

Sorting

You can specify how certain data is displayed in the storefront. The selection let you determine how the items should be sorted on various pages.

Related Items

You can associate an item with other items, for cross-selling, or for accessories for example. When you add a related item, the related item can be displayed in Item's Detail page, according to your Page Layout settings. See "Page Layout" settings under Design. To add or remove a related item, click the Related Items tab.

Recommended Items

This feature is also known as the "People who bought this also bought…" feature. When enabled, the Storefront will also display items that it believes the customer may also be interested in, based on previous customer's purchases. Unlike "Related Items", where you manually associate items with one another, this is automatic and is based on actual order history.

Best Sellers

This feature allows you to highlight items/products that are your top sellers. The Storefront will keep track of how many of each item is sold, and use that to display your best sellers. If you were using a previous version, and upgraded, you may be prompted to run the "Calculate Best Sellers Data" tool. This tool can be used to calculate or re-calculate your top sellers based on the orders in your database.

Item Options

You can have as many options associated with an item as you wish. For example, if your item is a shoe, and you want to offer it in different sizes, you may want to create a list of choices called "Size" and in that list would be a list of the available sizes, for example "Men's 10", "Men's 11", etc. For more on setting up options, see the "Item Options" section in this document.

Reviews & Ratings

With the Storefront you can allow your customer's to write reviews and rate your products. To manage item/product reviews, click on "Customers" then click on "Reviews" and see the "Settings" tab.

Enable
Before your customers can begin writing reviews you must enable this feature. There are three options:

1. Reviews allowed (for specified items) - This option allows you to specify on a per-item basis which products can be reviewed. When enabled, you must go to the individual item in the Admin and toggle the "Enable Item Reviews" option.

2. Reviews allowed (All Items) – This option will allow all customers the ability to write a review for any item in your storefront. This will override the individual Item's settings, so even if the product does not have the "Enable Item Reviews" option checked, customers can still review it.

3. Disabled. Reviews cannot be written or viewed.

NOTE: Be sure to enter a reasonable "Review Length", which is the number of characters (how long) the review can be.

Approval Process

As a precaution the Storefront has a built in approval process for reviews. This is to protect your storefront from displaying malicious or otherwise inappropriate content. Choose "Require Approval" if you want to supervise any reviews written by your customers. After a review is written, the review will be put into a "Pending" status. You will need to change the review status to "Approved" in order for the review to appear. To check for new reviews, just click on "Customers" then "Reviews". You can also see the reviews by their status from the product's page in the Admin, click on the "Reviews" tab.

While there is a "No approval" option, this is not recommended. When selected, all reviews will be displayed immediately with no supervision, meaning anyone can post anything on your Storefront pages.

Item Options

Basic Options

Once an item is initially saved, you will see a new tab labeled "Options". Options are grouped together, and can be in the form of Check Boxes, Radio Buttons, a Dropdown list, or you can have Text Input Boxes (where someone can type text, to add comments to the purchase for example).

For each set of options you must first create a "Group". For example, if you wanted to create a DropDown list with different "sizes", you would need a group called "Size". Click "New Group" and enter the Name and Heading and select the type of option, in this case "DropDown".

Next, you will need to create the actual options (the selections that will appear in the DropDown list you just created). Under the Group you just created, click "Add Item". Select "Regular" to quickly create an option (or for more complex scenarios, you can search for an existing item, see below).

Name
This is the Name of the option, which is what your customers will see. The name will appear in the DropDown list you just created. If the group is set to Radio Buttons or Checkboxes the name will appear next to each box/button. If the group is set to Text Input, the option name will appear right above the text input field.

Inventory Quantity
This quantity is how you would track inventory; this is the total number available/left. When you have "Prevent Sale of Out of Stock Items" selected on the main Inventory settings page, and have selected "Enable Inventory" on your option, this option will only appear and can only be purchased if the option has enough available. If your options are actual parts, other items, or if they need a Sku, see the "Options with Inventory" section in this guide on the following page.

Add to Cart Quantity
We recommend that you always set this to "1". This is not to be confused with the "Quantity" the customer sees next to the "Buy Now" button when ordering.

There may be some situations where may want to change this, however it's not recommended. This number serves as the multiplier, meaning this number is how the price adjustment is calculated. This number is only seen by the customer if the quantity is above zero. When the quantity is above zero, this number will be shown on the Order receipt as a line item, grouped with the main item being purchased. This Quantity must be at least 1 if you plan to have a price adjustment (enter zero if want it to be a simple non-price related option).

Price Adjustment
This setting allows you to lower or raise the price of the main item being purchased, based on the options selected. The Amount field is the amount that will be added or subtracted to the base price (by base price we mean the main product/item's Price and Sale Price).

Be sure you have an "Add to Cart" quantity of at least 1 for your option, or the price adjustment will be zero (the price adjustment is calculated by taking the Quantity of the main item being purchased, that is the number shown next to the customer's Buy Now button, and multiplying it by the option's Add to Cart Quantity, which is not visible to the customer)

Weight Adjustment
This setting allows you to lower or raise the weight of the main product/item being purchased, based on the options selected. This is primarily for calculating shipping charges. For example, if you are selling shoes and Men's shoes weight less than Women's, this could affect the shipping charge.

List Order
You can specify the order in which this option will appear in the group/list, for example if you want this option to show first in a dropdown list, enter 1, for second in the list enter 2, etc.

<u>**Set as Default**</u>
This is recommended in situations where you have price adjustments. When you make an option a default, it will be pre-selected and the product/item's price will include the pre-selected option.   You should also use this if you have your Storefront configured to show the "Buy Now" button in places other than the Item's main detail page. Customers will only be able to select options when on the Item's Detail page.

To see some typical examples of how you can configure item options, be sure to visit our demo storefronts found on the "Demos" page of our site.

Options with "Inventory"

<u>**Basic Options (Method 1)**</u>
Create a regular option (like above), after creating the option item check the "Enable Inventory" box and enter the available quantity for the option. When this option is purchased with an item during checkout, the inventory quantity will be reduced accordingly.

<u>**Existing Items (Method 2)**</u>
This method would be more appropriate if your options require (or have) a Sku/Part Number. While more complex, this method would be similar to how most accounting & POS systems work. You would create a separate Storefront item for each option or combination of options; same as you would create a regular product/item, however this item could be selected by shoppers as options under another item (referred to here as the parent item).

Here is an example of how to create a simple T-Shirt that comes in different Sizes with each size having its own sku/item number.

To setup T-shirts in different colors and sizes (and track inventory for each color/size), follow these steps:

1. Create your main (parent) item, a regular item named "Nice T-Shirt", item number "item1", assign it to a category. This is the item your customers will see in the store.

2. Create another regular item called "Large Blue"; you may want to use an item number like "item1-LB". Do not assign this item to a category, it is only for inventory purposes, your user will not buy be buying this directly. Next, create another regular item called "Medium Blue", item number "item1-MB" etc.

Repeat step 2 for each combination of Color & Size.

3. Go back to your "Test T-Shirt" item, "item1", and create an option group called "Color & Size".

4. Add an item option to this group, instead of clicking "Regular" option for the type of option, select an "Existing Item" and search for the "Large Blue" shirt you just created and select it as the option.

Repeat step 4 for each different combination of color/size.

Category Setup

The Storefront can be configured to have an unlimited number of categories, and sub categories. From the main menu in the Admin, choose "Categories".

If you click on "Show All" you will see a category "tree", listing all top level categories alphabetically. Beneath the top level category, will be any subcategories. You can click to edit the category.

Beside the category name you may see a button with a small "plus" sign; this allows you to quickly view any items that are in that category.

Below is a description of the commonly used fields (found on the category page).

Category Name
The category name should be short, one or two words. It can be up to 50 characters in length. Your category name should not contain any symbols or other unusual characters. You cannot use the following characters: "\" ":" "/"

Parent Category
The "Parent" category field is used to make a category a sub category, in other words you are putting the category under another category. If you want to create a sub category simply create a new category like normal. Then, specify a "Parent" category by using the drop-down list. If you are creating a top-level category, a category that is a main category, leave the "Parent" category field blank. Later, if you decide to change a sub category to a top-level category, just select the blank option in the drop down list and "Save". This will remove the Parent category.

Short Description
The short description appears on the Category detail page in the Subcategory section. In other words, this description is only seen when the category is being shown as a subcategory on another category's page. Use the "Detailed description" for primary descriptive text.

List Order
Optionally you can enter a number here. This number will be used when your categories are set to sort by "Specified List Order". For example, if you do not want your categories & subcategories to be listed alphabetically, you can specify the order in which they are shown using numbers; for example, lower numbers appear first, higher numbers appear last.

Detailed Description
The detailed description is edited using the built-in "HTML" or "Content" editor. This gives you unlimited formatting controls over text and you can even insert images or other code. This content appears on the "Category" detail page (users will be taken to it whenever they click on a category from within the store).

The detailed description has no length limitations, however if you are inserting images or tables, we recommend that they do not exceed 350 pixels in width (to prevent the page from being stretched). You can also edit the raw HTML code if you are experienced with HTML; use the second edit button shown.

Thumbnail (small) Image
The thumbnail, or small image, appears on when the category is being shown as a sub category (when the customer viewing this category's parent category). You can enter the filename of any image that is located in the "images" directory on your web server (Example: picture.jpg), or you can enter the URL to the image if it's locate somewhere else on the web, for example "http://somesite.com/image.gif". Unless you are entering a URL, do not use "/" or "\" characters in the filename.

This image will be automatically resized in the browser to the dimensions you entered on the Image Size settings page, see "Image Sizes" in the Admin in the Design area. However, you should reformat/size your images appropriately before uploading them.

Large Image

The large image appears on the Category detail page, just beneath the category's name. You can enter the filename of any image that is located in the "images" directory on your web server (Example: picture.jpg). Or you can enter the URL to the image if it's located somewhere else on the web, for example "http://somesite.com/image.gif". Unless you are entering a URL, do not use "/" or "\" characters in the filename. We recommend that your image should not be larger than 400 pixels in width as it might crowd the page.

This image will be automatically resized in the browser to the dimensions you entered on the Image Size settings page, see "Image Sizes" in the Admin in the Design area. However, you should reformat/size your images appropriately before uploading them.

Category Items

Max Per Page

This setting allows you to specify how many category items should appear on a given category page.

Page Style

There are two ways your items can be displayed on the category page, in columns or a standard list. If you choose columns you must specify the maximum columns you want your items displayed in. The number of items and rows depends on your Max Per Page setting.

You can also specify what elements are visible on the category page. Using the different "Show" checkboxes, you can hide or display elements. For example, you can hide the item's image, price, description, item number, or other elements, to customize the look of your storefront.

Meta-Tags

Meta Tags are the Title, Description and Keyword data that are embedded into each category's web page, it is used by search engines to determine your listing (Note you must submit your site to search engines, the Admin does not submit sites for listing). You can enter a Title, Keywords, or description for each category to improve search engine racking. If you leave these settings blank, the default Meta tags you setup under the "Title/Keywords" settings page will be used.

Email

Settings

Admin Email Address

Enter the email address of the webmaster, or administrator. Since many email servers check for valid "From" email addresses, we recommend you use an email address that has the same domain name as your website. In other words, it should be an email address that your web host is configured to host.

SMTP server

Enter your email server's name or IP address in this field. You may need to consult with your email or web provider for this.

Special Note: You should be using an SMTP server that is local to your web server; the SMTP server you enter in the Admin is not necessarily the same SMTP server you use on your PC/computer. Most web hosts have a special SMTP server within their network that is specifically configured to "relay" or send email out from your web server. Using an SMTP server that is not local may not work if that SMTP server is configured to only relay "local" connection (which is normally the case).

SMTP server

Typically this is port 25, but when a secure connection is required it may vary.

Enable Secure Connection

When enabled, communication will be secured using TLS (some documentation may still refer to secure email as SSL, or SMTPS)

SMTP Authentication

If your web host or email provider requires this, you can enable this feature. Email will not be sent unless it is authenticated using your email/password combination.

Admin Notification

The Storefront will automatically send a notification email to two email addresses that you specify. Notification is typically only sent when a new order arrives, and when a new affiliate registers.

Enable

Check the "Enable" box if you wish to be notified by email when new orders are received, or when new affiliates register. Anytime an order is completed or an affiliate registers, the Storefront can automatically generate a notification email. The email can be sent to up to two persons (two different email addresses). The email will contain a direct link to the "new" order.

Sent to

Here you enter the email address of the person who should receive the notification email. Example: you@domainname.com. Do not use quotes or names, simply type the email address.

Sent Copy to

Here you can enter an additional email address of the person who should receive the second notification email. Example: you@domainname.com. Do not use quotes or names, simply type the email address. If you only want one email sent, leave this field blank. Be sure to remove all spaces from this field if you are removing an email address from here

Contact Us

The Storefront can be configured to allow web visitors to send an email to you, directly from within your online store. When enabled, users will see an email form on the contact us page. They simply fill it out with their name, email address, and a message and click "Submit". An email is automatically sent to you.

Enable Contact Us Email?

Check this box if you wish to turn on the contact us form.   If you have not already done so, you will also need to create a Menu/Link to Tab that links to the contact us page. See "Menu/Links" to configure this.

Sent to

Here you enter the email address of the person who should receive the contact us email. For example: you@domainname.com, do not use quotes or names, simply type the email address.

Sent Copy to

Here you can enter an additional email address of the person who should receive the second contact us email. Example: you@domainname.com. Do not use quotes or names, simply type the email address. If you only want one email sent, leave this field blank. Be sure to remove all spaces from this field if you are removing an email address from here

Use customers "From" Address

This is only recommended if you host your own SMTP server, and it is "local" to your web server, meaning it is installed on the same network as where your web server is. This option will make it easier to reply to a Contact Us email; however a misconfigured SMTP server may refuse to relay emails that have an unknown "From" email address.

Order Confirmation

The Storefront can be configured to automatically send an email to your customers immediately after they make an online purchase. This email can be customized by you.

Send Email Confirmation?

Check this box if you wish to enable this feature.

From Name

Here you enter the name as it should appear. Example: YourStore.com

From Email

Here enter the email address from which the email will seem it came. Example: you@domainname.com. Do not use quotes or names, simply type the email address. This will also be the "reply to" address, if someone replies to this email it will go this address.

NOTE: Since many email servers check for valid "From" email addresses, we recommend you use an email address that has the same domain name as your website. In other words, it should be an email address that your web host is configured to host.

Subject

Type the subject of the Order confirmation email, Example: "YourStore.com Order Confirmation"

Email Text

Type the body of the email here. Here, you can use order variables. Variables are built in code words that you type into the body of the email text, for example "##CUSTNAME##". When the Storefront generates this email at the end of the order process, it will replace the variables with the appropriate information or text. Below is a list of variables for use in the Order Confirmation email body:

Order Number: ##ORDERNO##
Customer Name: ##CUSTNAME##

Current Date: ##DATE##
Order Link: ##ORDERLINK##

The order link is an http link to the order status page.

Password Recovery

The Storefront can be configured to send "Forgotten Passwords" to your customers. If one of your registered customers (someone who has previously made a purchase online), forgets their password they can request it be sent to them by email. Customer passwords are recorded during the checkout process, and are required to access the order status page, and when returning to make another purchase. This is an automated process.

Allow Password Recovery?

Check this box if you wish to enable password recovery. If you choose not to enable it, web visitors will not see the link to this special page.

From Name

Here you enter the name as it should appear in the email header. Example: YourStore.com

From Email

Here, enter the email address from which the email will seem it came. Example: you@domainname.com. Do not use quotes or names, simply type the email address. This will also be the "reply to" address, if someone replies to this email it will go this address.

NOTE: Since many email servers check for valid "From" email addresses, we recommend you use an email address that has the same domain name as your website. In other words, it should be an email address that your web host is configured to host.

Subject

Type the subject of the forgotten password email, Example: "YourStore.com Password"

Email Text

Type the body of the email here. Here, you can use the password variable. Variables are built in code words that you type into the body of the email text, Example: "##PASSWORD##". When the Storefront generates this email, it will replace the variable with the user's password.

Checkout Settings

In the Storefront you can customize the flow/steps of checkout, who can view the Storefront pages (your products, categories, etc), and who can create accounts.

Normal Checkout

When Normal checkout is selected, your customers will be able to make purchases by becoming a registered user. They will be asked for billing address information, email address, and will be required to create a password.   They will be creating an account which will store this information, and they will have the ability to login later and view orders, check order status, create Wishlists, post reviews, etc.

If a customer is already a registered user, they can simply use the "Sign-In" button to login and continue checkout, without having to retype any information.

Quick Checkout

When you select "Quick Checkout" customers will not be required to create a password, and no account will be created. A more streamlined checkout will occur; the fewest checkout pages possible are shown.

Registered User Checkout

With this option, Only "Pre-registered" customers can checkout. In other words, only customers that either already have an account or you created one for, can make purchases.

Access Controls

Here you can control, limit, who can view your Storefront pages. This is useful if your storefront is geared only toward certain customers (you are a wholesaler for example)

Normal

When Normal mode is enabled, anyone can view your Storefront pages and anyone can make purchases.

Only Registered Users

This means only users who have previously registered, or that you created an account for, can access the Storefront pages and checkout. If you want to truly restrict access to only customers you setup, you must also change the checkout flow to "Only Pre-Registered", this way no one can create an account on their own.

Shop is Closed

In this mode, no Storefront pages can be viewed. This is ideal while you're site is still being developed. If anyone tries to view a Storefront page, they will see a message (determined by you).

Breadcrumbs

When this feature is enabled, the Storefront will track the user's movements, and allow them to more easily navigate your storefront. For example the "Keep Shopping" button that appears in their shopping cart will automatically return them to the last category or other content page they were just viewing.

Note: it will not return them to the item's page, but the category or page they were just on before viewing the item, this is by design.

Click To Accept (Terms & Conditions)

This feature is useful if you have Terms & Conditions that you want your customers to agree to before completing a purchase. When enabled, your customer will be forced to check the "I Agree" option. The Terms & Conditions will appear on the Payment page during checkout.

Mini Cart Summary

When customers are shopping on your site, you may want to provide them with a Summary of the items in their shopping cart. When this feature is enabled your customers will see a brief summary of what's in their shopping cart, for example "You have 2 items in your shopping cart. Order Total: $25.99"

B2B (Business to Business)

If you cater to Businesses, you might want to enable this feature. When enabled, additional "Company Name" fields will be included on checkout screens. This will allow you to capture business information. The Company fields can be set to be optional.

Newsletter Opt-In

This features works in tandem with the Newsletter Export.   When the "Newsletter Opt-In" is turned on, your customer will see a box to check, to enroll in for your Newsletter during registration. While checking out and registering as a User ("Normal" or "Normal & Quick" checkout must be enabled, see above), your customer can opt-in to receive your newsletters, promotional mailings, etc. Their preference will be stored in the database with their profile. Customers can update this at anytime by logging into their account using their email address and password.

Orders

Order Status

The Storefront can be configured with an unlimited number of order status codes. The order status codes are used by you to manage or categorize your orders. Examples: "New", "Backordered", "Shipped", "Cancelled", etc. The default code for all new orders is "New"; as soon as an order is placed (and the payment portion of checkout is complete) the order will have a status of "New". For all other status codes you must create your own.

Adding more Status Codes/Names

On the Order Settings page, you will see a list of all Status codes in your Storefront (except "New", this is built in and cannot be changed or removed).   To add your own status codes, use the "New Status" button.

Status Name

Status names should be one word, without spaces ideally, and should not contain any unusual characters and no symbols. The description of the status code is only visible to you.

Order Numbers

Next Order Number

The Storefront automatically generates order numbers, but you can determine the "next order number". The is the number that will be assigned to the next order received. The number will automatically increment by 1 after each order.

Order numbers may not be generated sequentially. By design, an order number is assigned as soon as the customer provides their Address information during checkout, meaning that if they abandoned the checkout, that order number will be skipped (never used again, for tracking and security reasons)

Order Data

All of the data collected during checkout is stored in your database, it can be viewed by you in the Admin (and your customer can view certain details and check the status of an order by logging in with their email address and account password)

To edit or view orders (or any order related information) navigate to the Order Summary in the Admin. You can locate orders easily by searching for them by status, order number, date, or name.

Below is a description of some of the commonly used order fields.

Order No.

The order number is generated automatically during checkout, and cannot be changed. You can set the "Next Order Number" in the Admin, on the "Orders" settings page.

Order Date

This is automatically entered at the time the order is initiated, and cannot be changed.

Status

You can setup as many Order Status types as you need, see the "Orders" settings page. When an order is started, a default status of "Incomplete" is entered. When the order has reached or completed the payment portion of checkout, the status is changed to "New". These initial status codes cannot be changed.

Carrier/Tracking Number

This is optional, and will only appear if your customer was prompted for a Shipping Service. After you ship a package to your customer, you may want to enter a tracking number. You can edit the tracking number by clicking on the "Shipping" tab while viewing an order summary. Your customer will be able to view this tracking number when they log in.

Billing & Shipping Addresses

These addresses are part of the order record; you can change them without affecting any other orders, or the customer's account.

Payment Type

This field is used to represent the payment method selected during checkout, or the credit card type. If you are using a payment gateway, the gateway's name will appear here instead of credit card type.

Credit Card Number

During checkout, if you are processing payments with Authorize.net (AIM), or have enabled the offline mode, your customer will be prompted to provide their credit card number. The card number will appear in this field.

Credit card numbers are encrypted and can only be viewed through the Admin (you cannot access the number by opening the database file).

NOTICE: There are many security risks associated with storing credit card numbers on a web server. It is recommended that you enable the "Recommended Security Settings" in the Admin, found on the "Payment" settings page. You should not store credit card numbers in your database for any length of time, or at all.

Approval Code

This field is automatically populated by the Authorize.net payment gateway, and some PayPal transactions.

Transaction ID

This field is automatically populated by the Authorize.net payment gateway, and some PayPal transactions.

NOTE: If you are using PayPal Standard, and have not enabled the PayPal "IPN", the approval code and transaction id will not be recorded.

Name on Card

This is the name field; your customer's should enter the name "as it appears on their credit card"

IP Address

This is Internet Address number of the customer. The IP address is captured during the checkout process, and is stored in the order. This can be used later to track or identify the identity and location of the user. IP addresses are similar to phone numbers, and can be traced (for example, during a fraud investigation you would give this number to the authorities).

Notes

Order notes are internal comments; you or your staff can use this field to write comments about the order or customer. These notes cannot be seen by the customer.

Public Notes

This note field is similar to the regular Notes field, except your customers will be able to see these comments when they login and view their order online. Use this field to post special notes, tracking details, or other information related to the order that you want your customer to see.

Inventory

The Storefront has integrated inventory control, it can track inventory for each item automatically. Each time a shopper purchases an item, the quantity sold is deducted from inventory upon completion of the checkout process.

Out of Stock Threshold
This number determines when an item is considered "out of stock" and when related messages are displayed. This is the cut-off point, if inventory for an item goes below the threshold, the out of stock message is displayed and item cannot be purchased (see other settings below).

This number would normally be zero; however it can be a positive or negative number.

Display Out of Stock Messages
This is the On/Off switch for the Out of stock message. When inventory for an item is below the threshold an "out of stock" message can be displayed on the item's detail page and in other places the item appears. You can customize the message that is displayed to your customer.

Message
The In and Out of stock message can be customized. You can type any text you want.

For the "In Stock" message you can include a special variable "##QTY##" to indicate the actual inventory quantity available. Here is a typical example of stock messages:

"In Stock! There are ##QTY## Left"

When this message is shown to the customer, the text ##QTY## will be replaced with the actual Quantity of the item.

Prevent Sale of Out of Stock Items
By enabling this feature, you can prevent a shopper from purchasing Out of Stock items. The "Add to Cart" button will not appear when this button is checked. Note that the "Out of Stock Threshold" number determines what qualifies as out of stock.

Use Pounds (lbs) & Ounces (oz)

When this setting is checked, all weights in the Storefront & the Admin will appear as pounds & ounces (two separate fields).

NOTE: Weights are stored in the database as single decimal numbers, in other words there is only one field in the database to represent the weight. The actual weight entered as pounds and ounces is converted to a decimal for storage and calculation purposes. This is by design and does not affect the accuracy of the weights.

Shipping

The Storefront can be configured to handle an unlimited number of shipping methods or services (aka carriers). In other words, you can present your customers with unlimited number different shipping choices. There are two ways, either create your own Custom Rates, or provide real-time rates direct from the Carrier (UPS, USPS, FedEx, etc)

Custom Rates

For each service you create you can specify the shipping rate and how it is calculated (the rate method).

Name

This is the name of the shipping service, how your customers will see it when selecting shipping.

Ship To Country

If you want to offer a particular service only to a specified country, select a country.

Select "ALL" if this service applies to all countries you ship to.
Select "ALL Others" if you want this service to apply to all the countries you did not setup services for.

For example, you created services for US and CA, and you want this service to apply to all the others, all countries except US and CA.

Order Subtotal Method

This means the rate will be calculated according to the order subtotal. You can specify ranges, and for each range you can specify an actual charge or percentage of the order subtotal.

Weight Method

This means the rate will be calculated according to the total weight of the order. You can specify ranges, and for each range you can specify an actual charge or a per lb/kg rate.

Number of Items Method

You can charge shipping based on the number of items purchased. You can specify ranges, for each range you can specify an actual charge or a per item charge.

Per Item Shipping Charge

When this method is selected, the "Shipping Charge" entered in each item's setup will be used. Be sure you enter a Shipping Charge for each item.

Determined Later Method

When you choose this method your customers will not know how much shipping will cost. No rate is displayed. "Unavailable" will be shown in place of a rate.

Estimated

When this box is checked, the rate you enter will be displayed to your customers as an "estimate" with an asterisk "*". This is useful if you want to determine the real shipping charges at time of shipping.

Alternate Text

In situations where the rate comes out to zero, or no charge, you may want to display some text instead of the number zero. For example, if you are offering Free Shipping you might want to say "Free" instead of 0.00. See free shipping below.

Handling/Surcharge

This amount will be added to the rate after it is calculated.

Minimum Charge

After the rate is calculated, if the shipping charge is less than this amount, the Minimum charge will be imposed.

Free Shipping

You can offer free shipping by using the Order Subtotal or # of items rate methods. First, you need to setup the condition that will result in a 0.00 (zero) shipping charge. Create a shipping service under custom rates, and choose the rate method you want to use, and create the "ranges" that will should result in a zero value and enter 0.00.

You may also want to check the "Use Alternate Text" box and specify different text that should be displayed, in place of the zeros, for example "Free".

UPS Rates

Before using the UPS API, you will need to activate the UPS tool, using Your Web Developer's UPS Licensing & Registration wizard. Go to the UPS settings page and click on the "Activate" button to start the process and follow the onscreen instructions.

You will need your Web Developer account number (found in your order confirmation email). During the Activation process you will also need to know the URL to the Admin (ex. http://yoursite.com/admin/), your Admin username & password.

U.S.P.S. Rates

To use the USPS tool you will need to register with the United States Postal Service, and obtain what's known as an "XML WebTools User ID". Registration is free, but must be done with USPS before using or testing this tool. Register at http://www.usps.com/webtools/ or contact the USPS for more information.

Required Testing

After you receive your XML Webtools User ID from the USPS, you will be required to test the tool in the Admin. The USPS does not allow you access to their "live" production servers until after you have successfully tested the interface. You can test the interface by selecting "Test Mode" in the USPS setup in the Admin. Test mode does not produce accurate rates; the rates are fictitious and are designed for testing purposes only.

Once you have successfully tested, you will need to contact the USPS Internet Customer Care Center (ICCC) by telephone or email (icustomercare@usps.com) and they will activate your user ID and password so that you have access to the production server. See your emails from the USPS for instructions on activating your user ID.

FedEx Rates

Before you can use FedEx shipping rates, you will need to obtain a FedEx Web Service "Key", FedEx Web Service "Password", and your "FedEx Meter Number". Below are the steps you will need to take.

Step 1. Go to the FedEx Developer Resource Center, http://www.fedex.com/us/developer/

Step 2. If you do not have a Developer account, click "Sign up" and register, otherwise login.

Step 3. Click on "Technical Resources" on the left hand menu.

Step 4. Click on "FedEx Web Services for Shipping".

Step 5. Click on "Move to Production".

Step 6. Next you will need to obtain a "Production Key", scroll down for the "Obtain Production Key" button.

Step 7. Next, you will be asked if you "intend to resell your software", please select "No". You will also be asked if you are a "Consultant" or "Corporate Developer", if this is your website select "Corporate Developer", if you are setting up FedEx for a client, select "Consultant".

Step 8. Accept the FedEx license agreement and provide any contact information requested by FedEx.

Step 9. FedEx will now send you a confirmation email with your account details such as your FedEx Web Service "Key", FedEx Web Service "Password", and your FedEx Meter Number.

Step 10. In the Admin, click on the "Settings" tab then click on "Shipping". On the FedEx tab, enter your Web Service credentials, select the services you wish to offer, enter your "From" shipping address, and select any default package settings.

NOTICE: If you decided (or were required) to first obtain a "Developer Test Key", be sure to select "Test Server" after entering your Test credentials in the Admin. The "Production Server" can only be used with a Production Key, and the "Test Server" can only be used with a Test Key.

InterShipper Rates

InterShipper provides real-time rates for FEDEX, UPS, USPS, Canada Post, DHL, and Airborne. To use this tool you must subscribe to the InterShipper service. InterShipper is a 3rd party service that provides instant, real-time shipping rates. Please contact InterShipper for your own User ID and Password before using this tool.

Enabling Real-Time Shipping Rates

In order for the UPS, U.S.P.S, or InterShipper services to appear to your customer during checkout, you must first enable the appropriate services, by selecting the individual services you want to offer.

Enable Services

On the UPS, USPS, or InterShipper settings page you will find the list of all of the available services. Check the services you want to offer to your customers. You can rename them by changing the "Display Name", and you can add a handling fee (additional amount) to the charge.

Error Handling

For each Carrier, you can specify how to handle errors. For instance, if an error occurs while processing rates or the rate cannot be retrieved for a service/carrier, or the service is not available between your default Address/Zip code and the Address the customer provided. If you select "Minimum Charge", whatever minimum charge you entered next to the service will be used. You can also specify if the rate should be shown as "Unavailable" or just hidden. We recommend that you select "Hide", because in most cases service is not being offered by the carrier for a reason; it's probably not available for that particular shipment.

If you receive a "Some Rates were not available" message during the checkout process, this can mean that one or more of the services you setup are not available for your package (based on the "Default address" you entered in the Admin and the "Shipping address" you entered during checkout). To troubleshoot rate related issues, use the "Shop Rates" button on the Shipping Carrier's page; duplicate the same conditions for your checkout session and see the error messages as reported by the services. For more on this, see Testing & Troubleshooting below.

Testing & Troubleshooting Rates

To test the different shipping Tools, simply use the "Shop Rates" button on each of the settings page pages in the Admin. In most cases, problems with shipping rates are associated with incorrect account

numbers, addresses, weights, or you did activate the tool.

Test Rates in the Admin
The first step in troubleshooting, involves using the "Shop Rates" button found in the Admin. First, check that your settings. Go to the UPS, USPS, or InterShipper settings pages and make sure the settings are in fact correct (only use 5 digit zip codes with the USPS Add-on).

Next, perform a test using the "Shop Rates" tool. You will be prompted to enter to/from addresses, weight, etc. If you are able to retrieve rates during this test, than the Tool is installed & functioning correctly.

Check your "Services"

Make sure you have enabled the services you want to offer, go to the UPS, USPS or InterShipper settings pages and be sure you have selected/enabled the appropriate services.

Common Problems
If you can successfully view rates while using the "Shop Rates" function in the Admin, but you only get "Unavailable" during your checkout testing, the problem is likely related to a combination of the "Shipping Address" entered during checkout, the combined "Weight" (the weight of all the items in your cart), and the "Default" from address you entered on the UPS, USPS, or InterShipper settings pages.

Default Rate Messages

We highly recommend that you make use of the "Error Handling" settings under the UPS/USPS and InterShipper settings pages. The Error handling will determine what happens when a rate or service you are requesting is not available during checkout. Since a "Some Rates are unavailable" messages may appear anytime one or more carrier services are not available, you may want to remove or customize these messages. You can simply edit the error text under "Text & Error Messages" in the Admin.

Other Notes:
If the rate returned by the service is lower than the minimum value you entered in the carrier's setup in the Admin, than the minimum charge is applied (instead of the service rate).

Taxes

In the storefront, you can specify how tax will be charged. Tax can be applied to orders based on particular items or delivery regions (such as State, Province, Country, or other region)

Global Tax Rate

You can specify a tax rate (percentage) that will be applied to all orders, regardless of address. Enter a numeric value, for example 8.5 if you want to charge 8.5% tax.

Country Tax Rate

If you want to charge sales tax based on the customer's location by country, you can specify a different tax rate for each Country. Tax is applied based on the customer's shipping address (where the goods are being delivered). Navigate to the Country, and enter the "Tax rate". Enter a numeric value, for example 8.5 if you want to charge 8.5%.   There is only one tax field, so on the order all taxes are combined. For example, if you have a global tax rate of 5% and a country tax rate of 1%, the total tax charged will be 6%.

State/Province/Region Tax Rate

If you want to charge sales tax based on the customer's state, province, or other region, you can specify a different tax rate for each entry. Tax is applied based on the customer's shipping address (where the goods are being delivered). Navigate to the State/Province/Region, and enter the "Tax rate". Enter a numeric value, for example 8.5 if you want to charge 8.5%.   There is only one tax field, so on the order all taxes are combined. For example, if you have a global tax rate of 5%, a country tax rate of 5%, and a state tax rate of 1%, the total tax charged will be 11%.

Tax Exempt Products

You can make some products/items exempt from all taxes, see the "Taxable" setting on the item's page. By default, all items are considered taxable. If you have a specific item in your store that is tax-exempt, locate the item and select "No" in the Taxable field.

Tax Cloud

TaxCloud is a free service that provides U.S. merchants with accurate address based tax rates. TaxCloud can also collect and submit your Sales Tax returns for your business. To get started with TaxCloud, visit their website at https://taxcloud.net/account/register?ref=179A7B00

API Login/Key

After creating a TaxCloud account, you will receive your API credentials. Follow the steps on the TaxCloud website for obtaining your API credentials.

Address Validation

Tax Cloud requires that you verify all shipping addresses prior to submitting a taxable transaction. The Storefront has a built in Address Validation tool, powered by the USPS. During checkout, customer shipping addresses will be validated. If your customer enters an address that the USPS identifies as incorrect, the Storefront will prevent checkout until the error is correct. If you are not using any other means to verify addresses, you must enable this option when using TaxCloud.

Auth/Capture Immediately

During checkout, the tax will automatically be authorized and captured by TaxCloud when enabled. Captured transactions may result in tax being reported to the state. Uncheck this option if you only want to Lookup tax rates during checkout.

Discounts

There are a few types of Discounts, per Customer, per Order (Coupon Codes), and Item Discounts (a.k.a. Quantity Pricing). Please note some of these features need to be turned on (enabled) before they will work. See instructions or the appropriate settings page in the Admin for enabling.

Customer Discounts

You can offer discounts based on the customer, you can configure the Storefront to offer unique prices based on the price level you associate with a particular customer's account, or a discount percent you enter in their profile. Navigate to the customer's profile (or create a new Customer) to manage this type of discount.

Price Level

Also known as a "Tier", this setting lets you associate a particular group of prices with this customer.   If you select Level 1 or Level 2, the customer (when logged in) will see a different set of prices. This is very useful if you have regular customers and other types (wholesale for example). To configure the actual prices, go to the product page and click the "Discounts" tab to enable & set prices for the additional levels.

Discount Percent

This setting gives you the ability to apply a fixed percentage discount to each customer. So if you have a particular customer you want to offer a certain discount to, you just enter that percentage and the customer's prices will be reduced by this amount on all items (they will not need to enter any discount codes or buy certain quantities for example)

Order Discounts (Coupons)

This type of discount uses a discount or coupon code. With this type of discount, you can issue Discount codes to your customer/s. Your customer would simply enter the special code during checkout to receive a percentage or fixed amount off their order. To setup this type of Discount, click on "Add New" under the Discounts heading in the Admin.

Before using this feature you must turn it on. Click on "Discounts" then see the Settings tab. There you can enable this feature and setup discount codes and their values.

Enable Coupons/Discounts

Check this box to allow shoppers to apply discounts during checkout.

Discount Name

This is the name of the discount, mostly for internal purposes (ex. "Referral Discount")

Discount Code

Enter a unique code word that your customers can enter during checkout to receive this discount on their order.

Date Range

You can specify when a Discount code is valid. The discount is only valid when used during the dates you specify.

Discount Amount

Discounts are applied to the entire order amount (subtotal). The discount can be percentage of the order total, a fixed amount, or a combination of both.

Order Minimum

You can specify a minimum purchase amount. The discount will only be applied to an order if the order subtotal exceeds this value.

Restrict Usage

You can limit how many times a Discount code can be used. For example, if you only want the first 100 shoppers to get this discount, check the Restrict Usage box, and enter 10 in the Max Usage field.

Item Discounts / Quantity Pricing

This type of discount only applies to a specific item, and is directly related to the quantity purchased.

By design, you must first enable this feature; navigate to the "Discounts" settings page to turn this feature on.

Display Item Discount prices

This will display quantity discount prices on the item detail page, where applicable. Setup quantity prices on the item detail page.

Next, to setup the actual discount prices based on quantity, navigate to each item and click that item's Discounts tab.

From / To Range

You will need to specify the quantity range so that the Storefront knows when to apply this special pricing. For example, if you wanted to offer a lower price on your item if your customer buys 2-10, simply enter "2" in the "From" field and "10" in the "To" field. For ranges with no maximum limit, ex "Buy 10 or more", you would enter a "From" number of 10 and a very high number in the "To" field (ex, 9999).

Price / Sale Price

For each range you can specify a specific price (per each). The Sale price is used for the item if it is listed as "On Sale".

Discount Percent

For each range you can specify a percentage off (off the original price, listed in the item setup).

Message

By default, the Prices and ranges will appear in your storefront (just below the regular prices). In some instanced, you may not want the Quantity Range and Price to appear, you may want to enter a special promotional message. For example, "Buy 5 and get 10% off". To enable messages, simply type the message in the Message field. To return the display back to normal, clear the message field of all text and click "Save"

Payments

Payment Methods

These setting determine how payments are handled during checkout.

"Offline" Credit Card Form

If you have a merchant account, but do not have a Payment Gateway setup for Internet processing, you can enable this function. Your customer's will be prompted for payment by credit card. The credit card number, Expiration date, etc. will be saved with their order. Later, you can view the payment related information and process it offline, with your own credit card machine, etc. You will need to setup your credit card types (see "Card Names" above).

NOTICE: You will not be able to enable some of the "Recommended Security Settings", you may need to uncheck the "Do Not Save" options. Check your merchant account agreement, some banks do not allow you to capture or save this data. For security reasons, we do not recommend capturing this information.

Credit Cards

Card Name/Type

You will need to create/enter the names of the credit cards you wish to accept. Your customer will select the card they are providing from this list, when using Authorize.net, PayPal's Payments Advanced, PayPal's Payments Pro, the "Offline" credit card form, or when you have the "Custom" real-time gateway enabled.

Require Card Code (CVV/CVC/CID)

Checking this box will prompt/require your shoppers to provide the 3-4 digit security code, printed on the credit card. Do not enable this unless you going to process this information. Check your merchant account agreement, some banks do not allow you to capture or save this data. For security reasons, we do not recommend capturing or saving this information.   See "Recommended Security Settings".

Notice about Credit Card Data

To protect the credit card holder against credit card fraud, you should not store any credit card related data in your database. Check your merchant account agreement, some banks do not allow you to capture or save this data. For security reasons, we do not recommend capturing this information. See "Recommended Security Settings".

Pay by Mail

If you choose, you can allow your shoppers to checkout without actually making a payment. When enabled, users will have the ability to bypass the credit card form and any other Payment gateway.   This feature is perfect if your customer will be mailing a check payment, or if some other method will be used.

Renaming this feature

You can call this feature anything you wish; it does not have to say "Pay by Mail" in your storefront, for example you could have it say "C.O.D." or "Purchase Order", etc. See Language/Text settings.

Special "Thank You" Message

Pay by mail orders are handled the same as a regular order, except a special "Thank you for your order Page" page will be displayed following checkout. To customize the content of this message, see "Page Content".

Payment Processing

By checking the "Enable Payment Processing via Gateway" option, you can have the payment portion of checkout handled by a supported Payment Gateway. A Payment Gateway is a company that offers processing services to internet merchants. Depending on which Gateway you choose, the credit or debit

card entered on your site may be processed/charged in real-time.   In order to use this feature, you must first establish an account with one of the Payment Gateway's that the Storefront works with. See "Payment Gateways" below.

Recommended Security Settings

To comply with today's security standards, you should enable all of the recommended security options on this settings page. To protect the credit card holder against credit card fraud, you should not store any credit card related data in your database. When all of these functions are enabled, the credit card number and related security codes will not be stored. If you are using Authorize.net's AIM processing or PayPal's "Pro" service, the credit card numbers will be processed normally, the authorization code and transaction ID will be saved, but the credit card numbers will not. To view the credit card details you would need to login to your Payment Gateway's control panel (visit their site). If you are using "Offline" credit card mode, you will not be able to use enable some of these security features.

Transaction Limits

When you use "Real-Time" credit card processing, such as PayPal's Payments Advanced & Pro or Authorize.net's payment gateway, the Storefront can limit the number of payment transactions (payment attempts). This can be useful in preventing credit card fraud. For example, these settings can help you prevent the same person from using multiple credit cards or placing multiple orders using different email addresses. When enabled, the Storefront will count the number of "attempts" your customer makes when entering their credit card.

Maximum Per Order

Enter the number of transactions you want to allow per order. Enter zero (0) if you do not want to set a limit. A good setting might be "3". This gives your customer 3 chances to enter the credit card number.

Maximum Per IP Address

Enter the number of transactions you want to allow per IP Address. Enter zero (0) if you do not want to set a limit. An IP Address is a unique address assigned to each user by their Internet Service Provider. This setting can help you prevent fraud when someone places multiple orders, using different email addresses.

Important Notes

Use caution when using this particular setting. This setting limits the total number of orders that can be placed based on a single IP Address. A good/known customer can be adversely affected by this if the number is set too low. You should consider how many purchases your average customer makes, and multiply that by the "Maximum Per Order" setting.

When either maximum is reached, your customer will not be able to complete checkout, they will instead see a special message instructing them to contact you for assistance.

Payment Gateways

Credit Card Processing

NOTE: We strongly recommend that you verify the receipt of all payments with your payment processor (aka Gateway) before shipping any of your merchandise.

Enable Real-Time Processing during checkout

In order to process payments in real-time with Authorize.net or PayPal's Payment's Pro, you must check this box in addition to enabling the gateway (see below).

Authorize.Net (or compatible gateway)

Authorize.NET is the leading internet payment processor. This is the recommended method of authorizing and collecting credit card payments online. A merchant account is required. If your payment processor is compatible with Authorize.net (their system accepts transactions formatted with Authorize.net's parameters), you can enable the Authorize.net Gateway, see below.

Login ID

Here you must enter your login ID as provided by your merchant services bank.

Transaction Key

Enter the unique key that was generated by your gateway for you. This will serve as a "password" that will be sent along with your Login ID to authenticate the transaction. See your Authorize.NET (or compatible gateway) user guide for further instructions.

Use Password

NOT RECOMMENDED. While you can simply enter your Authorize.net Password here to start processing, this is not recommended. You should contact Authorize.net about generating a unique transaction key instead. See your Authorize.NET (or compatible gateway) user guide for further instructions.

Currency Code

Here you must enter the currency code for your country. The default is USD (U.S. Dollars). See your Authorize.NET (or compatible gateway) user guide for further instructions.

Authorize.NET Compatible Gateways

The Storefront can be used with other payment processors that are "compatible" with Authorize.net's basic parameters. You should consult with your Payment Gateway regarding setup and parameters. The Storefront allows you to use an alternate processing / transaction URL. Simply enter the URL to your payment gateway's server in the "Alternate Processing URL" field and enable it. When enabled, the transaction will be posted to your gateway's server rather than the Authorize.net server.

NOTE: Your Web Developer can only provide limited support when "compatible" gateways are used (ex. when you don't use Authorize.net to process). Our free support does not cover any parameter modifications.

PayPal Standard

If you do not have a merchant account, you may choose to enable this payment gateway. A PayPal account is required. Enter the email address you use to login to PayPal. Select the appropriate currency code. During checkout, web shoppers will be redirected to the PayPal payment form. After they complete their payment, they will be returned to your storefront where a receipt and order thank you message can be displayed.

PayPal Payments Advanced (PayFlow Gateway)

This is another popular payment option provided by PayPal, formerly known as PayFlow Link or Verisign PayFlow Link. This gateway is similar to PayPal Pro, except that you can use your own merchant account and you are not bound by any Express Checkout requirements.

PayFlow Link

This option provides a Hosted Payment Page, so your customer enter their credit card information on a customizable page hosted by PayPal (this simplifies PCI compliance). After the transaction is completed PayPal will post the payment confirmation directly into the shop using a Silent Post feature. You will need to configure your PayFlow account's Return, Cancel, Silent Post Urls.   Below are some examples Urls.

Return Url: yoursite.com/shop/gateway_in.aspx
Cancel Url: yoursite.com/shop/gateway_cancel.aspx
Silent Post Url: yoursite.com/shop/gateway_ppipn.aspx

PayFlow Pro

This is a full integration with PayFlow, meaning your customer make Direct Payments on your website. You are responsible for meeting all PCI requirements.

Legacy PayFlow Link

This is the original Verisign integration of PayFlow link, there is no Silent Post therefore no payment confirmation. This option is no longer recommended.

Partner
Enter 'PayPal' if your merchant account is with PayPal, otherwise enter the Partner name you are given by your merchant bank.

PayPal Payments Pro (Express & Direct Payments)

Below are the steps you need to follow to properly configure and test this service. For PayPal's simpler "Standard" service, see PayPal Standard below.

Step 1: Set Up a Verified PayPal Business Account
Customers who don't have an existing PayPal account:

1. Go to https://www.paypal.com/us/mrb/pal=KK2WQZDDH3DML.
2. Click Sign Up Today.
3. Set up an account for Business Owners.
4. Follow the instructions on the PayPal site.

Customers who already have a Personal or Premier account:
1. Go to https://www.paypal.com/us/mrb/pal=KK2WQZDDH3DML.
2. Click the Upgrade your Account link.
3. Click the Upgrade Now button.
4. Choose to upgrade to a Business account and follow instructions to complete the upgrade.
5. If you haven't already, add a bank account to become a Verified member. Follow the instructions on the PayPal site. This process may take 2-3 business days.

Step 2: Apply for PayPal Payments Pro
This step is only required for Payments Pro.

1. Go to https://www.paypal.com.
2. Click the Merchant Services tab.
3. Click Payments Pro (U.S. Only).
4. Click Sign Up Now.
5. Fill in your information, and submit your application. Approval takes between 24 and 48 hours.
6. Once approved, accept the Pro billing agreement. Check the Getting Started section on the upper left of your account overview page.

Step 3: Setup API Access

1. Log in to your PayPal account and click the Profile subtab.
2. Click the API Access link under the Account Information column.
3. Click the Request API Credential link.
4. Select "API Signature". PayPal will generate a unique signature as well as a username and password.
5. Copy/Save the credentials; you will need to paste them into the Admin (see next steps).

Step 4: Enter PayPal Account & API credentials into the Admin

1. Log in to the Admin.
2. Go to the 'Gateways' setup page.
3. Under 'Credit Card Processing' section, check the first 'Enable' box.
4. Scroll down to the "PayPal Payments Pro" section and enable this option.
5. Select Direct Payments (which includes Express checkout), or select Express Checkout only. With the Direct Payments method, your customers will be prompted for their credit card on your website (we do not recommend storing credit card information on your website, see the 'Recommended Security Settings' on the 'Payments' setup page in the Admin).
6. If you chose Direct Payments, you should also decide how you want the payments processed (Sale or Authorization). If you select "Sale", than credit cards are charge immediately and no further action is required following checkout. If you select "Authorization", the payment is only authorized, in order to receive the funds you must login to your PayPal account and "Capture" the payment before the authorization expires.
7. Optional. You may want to enable "In Context" checkout, which goes hand in hand with Express Checkout. When enabled your customers will remain on your website at all times even when using Express Checkout. You must enter your PayPal Merchant Account ID if you enable this feature. Contact PayPal for your Merchant Account ID
8. Enter your PayPal account details in the Admin, including the API credentials you created earlier.

(Optional) Testing

You can test the API processing by enabling the "Test Mode" on the Gateways setup page in the Admin. When this mode is checked, all PayPal API transactions will go thru PayPal's "Sandbox" environment. In order to use the PayPal Sandbox, you must setup a special developer account for this (contact PayPal for more information on how to use their Sandbox or go to https://developer.paypal.com. Please note, support is not provided for Sandbox accounts.

2CO (2Checkout.com)

This is another popular payment gateway. 2Checkout.com is a 3rd party merchant services alternative. To use this gateway, simply enter the SID as provided by 2Checkout.com. During checkout, web shoppers will be redirected to the 2Checkout payment form. After they complete their payment, they can be returned to your storefront where a receipt and order thank you message can be displayed. To return shoppers back to your site, login to your 2CO Account and enable the "Approved" or "Pending" URLs (found under "Look & Feel", see "Gateway Return URLs" below).

WorldPay (Select Junior)

A WorldPay account is required for this gateway. Enter your installation ID and currency code as provided by WorldPay. During checkout, web shoppers will be redirected to the WorldPay payment form. After they

complete their payment, they will not automatically be returned to your site. You should configure your WorldPay account to provide your customers with an emailed receipt. Alternatively, using WorldPay's CMS (Customer Management System), you can modify WorldPay's default "Result" & "Payment" pages to return shoppers back to your Storefront (see "Gateway Return URLs" below). Contact WorldPay for assistance with editing & uploading your own "Result" & "Payment" pages.

First Data LinkPoint

This is the deprecated LinkPoint gateway, known previously as Global Gateway "Connect" or "Basic/PayPlus". During checkout, web shoppers will be redirected to a special payment form. After they complete their payment, they will only be returned to your website if you enable the "Confirmation Page" URL. Login to your "LinkPoint Central" control panel and see the "Connect" settings. You may want to configure your LinkPoint account to provide your customers with an emailed receipt. ** This option is no longer recommended. Use First Data Global Gateway e4 Hosted Payment Page, now known as Payeezy.

Submission Form URL
In some cases, for security reasons, you may need to enter a "Submission Form URL". This is the page that your customer will be on just before the Storefront sends them to make a payment, for example: https://yoursite.com/shop/gateway_out.aspx.

First Data Payeezy (Global Gateway e4 Hosted Payment Page)

This is first data's newer hosted payment page, below are the steps you should follow to configure your First Data account to work with the Shop.

Setup Steps
In your First Data account, do the following.

Go to "Payment Pages" and create a New Payment Page.

Next, go to the "Receipt Page".

1. Select the "An HTTP Redirection to the receipt page (REDI)" option.

2. For Receipt Link, enter the URL to your shop followed by "gateway_in.aspx", for example, http://pdshop.com/shop/gateway_in.aspx

3. Under "Authorize.Net Protocol - Silent Post Settings", enter your shop Url followed by "gateway_silentpost.aspx". For example, http://pdshop.com/shop/gateway_silentpost.aspx

Next under "Security" do the following.

1. Select "MD5" for the encryption type.

2. Generate a Transaction Key

3. Generate a Response Key

To enable the payment gateway in PDshop's Admin, go to "Payment Gateways" under Settings.

Check the option "Enable Payment Gateways & Credit Card Processing"

Next, scroll down to the "First Data Global Gateway (e4 Hosted Payment Page)" section, and check the "Enable First Data" option.

Lastly, type in your Login, and then copy/paste your transaction and response keys that you generated.

Other Hosted Payment Page (Custom Gateway)

If your gateway or processor is not pre-integrated, you can integrate on your own using the Other Hosted Payment Page option. Most processors can provide you with the necessary code snippets or integration guides to easily incorporate their service into the storefront checkout. You will need to edit the "gateway_custom.aspx" script according to your gateway's integration. Contact your Gateway service or Processor for assistance.

Other Real Time Processing (Custom Processor)

If your gateway or processor is not pre-integrated, you can integrate on your own using the Other Real Time Processing option. Most processors can provide you with the necessary code snippets or integration guides to easily incorporate their service into the storefront checkout. You will need to modify the "processcc_custom.aspx" script according to your gateway processor's integration guide.

General Gateway Return URLs

Below are some examples of URLs that you may want to link to when using some payment gateways. These will not work with all Payment Gateways. These URLs DO NOT apply to PayPal, the Storefront automatically submits the proper URLs to those gateways while processing the transaction.

Thank You / Completed
https://yoursite.com/shop/gateway_in.aspx
(this is the recommended page to return your customer to)

Shopping Cart
https://yoursite.com/shop/showcart.aspx

Review Order
https://yoursite.com/shop/orderreview.aspx

Sorry/Cancel Order
https://yoursite.com/shop/gateway_cancel.aspx

** If you have Enable Secure Url (https) enabled, be sure to enter your secure Domain/Url when entering Return URLs.

NOTE ABOUT HTML "Frames":
If you decide to customize your website, avoid using "Frames" as they can interfere with the gateway processing (particularly with the "weblink" methods)

Security Considerations

Before enabling any "Real-Time" credit card processing, review all security documentation from your payment gateway or processor. If you enable Authorize.net, PayPal Pro Direct Payments, PayFlow Pro Direct Payments, or have enabled the "Other Real-Time Processing", you MUST have an SSL Certificate installed on your host/server and have the Secure Domain/Url enabled. You may also be subject to the PCI-DSS requirements and/or certification.

Gift Cards / Gift Certificates

The Storefront allows you to sell Gift Cards and Certificates (GC). These can be redeemed online, or you may offer a "send by mail" option (for use with more traditional paper Gift Certificates).

To sell Gift Certificates online, you will need to also setup a Menu Tab, or Link to the Gift Certificates page. Go to "Menu/Links", and create a new menu or link and select "Gift Certificates Page" under "Link To".

Steps Involved

1. Your customer purchases a GC online (or you can create it manually in the Admin, if the GC is purchased elsewhere)
2. * In the Admin, you Email the GC Code (using the default/auto GC email).
3. * In the Admin, you change the Status to "Sent", which enables the code.
4. Your customer redeems it online, during checkout by entering the GC code.

* This step can be skipped if you have "Send Electronic Cards/Certificates Automatically" enabled.

Purchase

User Defined Values

When this is enabled, your customers will be able to specify any amount they wish when purchasing a Gift Certificate.

Specified Values

When this is enabled, you can specify the exact denominations available. For example, if your Gift Certificates are issue with specific values ($25, $50, 100$, etc). Click "Add Values" to setup each denomination.

Electronic Only

When enabled, customers will not see the "Send By Mail" option. Only Online Gift Cards/Certificates will be offered. If you wish to send traditional Gift Certificates, or you will mail the Gift Card, uncheck this option.

Send Electronic Cards/Certificates Automatically

When enabled, Gift Card/Certificate is sent immediately by email. When not enabled, Gift Certificates purchased online are not immediately available for redemption.   When not enabled, after a Certificate is purchased, you must process the Certificate in the Admin, see Redemption below.

Redemption

To allow redemption of Gift Certificates (GC), you must first enable this function. Before a Gift Certificate can be redeemed online, it must be processed (meaning the "status" must be updated in the Admin).

Certificate Code

This is a unique code that is automatically generated when a GC is purchased online. If you setup a GC in the Admin (that was purchased offline), be sure to always use unique numbers/code. During checkout, to redeem the GC, you customer will enter this Code in their shopping cart.

Status

This represents the status of the GC.

New - Just created, is not available for Redemption yet.
Sent - This indicates that you have sent the GC by mail or email, and can now be used in the storefront.
Redeemed - This means that the customer has used this code in an order, and the remaining balance is 0.00
Redeemed (Partial) - This means that it was redeemed, but not for the full value. The customer can use it again, until the balance is zero.

*** The Status must be set to "Sent" before it can be redeemed.

To

This is the "To" name the customer entered while ordering this GC.

From

This is the "From" name they customer entered while ordering the GC.

Amount

This is the full value of the GC, as purchased.

Message

This is the text message the customer entered while ordering the GC.

Send Via Email / Mail

These toggles indicate how the GC should be handled, whether you should email the GC code or mail a physical Certificate to the Address provided.

Send Button

After you create a GC, or it's purchased online, you will see a Send Button on the GC's setup page. This button can be used to send the default GC email message (which you can setup under "Email" in the Admin). The email message can contain any text you wish, along with instructions on how to redeem the GC and the code. After you send the GC email, you should change the status to "Sent" so that the code is Active in the storefront.

If you sell Gift Certificates at a retail location, and want to allow redemption online, you can create Gift Certificates in the Admin. See the Gift Certificate Heading and click on "Add New"

WishLists

The Storefront has a built-in Wishlist type feature. Your customers can easily establish a Wishlist (items they want to buy or want as gifts).

<u>Enable Wishlists</u>

To enable this feature, you must first check this checkbox. You must also setup a Menu/Link to the WishLists page, so that the friends of your customer can search his/her wishlist. The "My Wishlist" button will automatically appear when Wishlists are enabled

Countries / States, Provinces, Regions

Throughout the Storefront and the Admin, various forms will require you and your shopper to select a Country and State, Province, or Region. You can create your own list of Countries and States or other Regions.

Keep in mind, you can also rename these fields/lists, For example, if you do not use "States" in your country you can rename this field (and use your own list of choices that is more appropriate). See "Form/Field Headings" in the Admin to change the wording of these.

Interactive Lists

You can make your lists interact with each other. For example, if you enable the "interactive" option only the States that are in the Country selected will appear.

System Default

Be sure to select the most appropriate default country. This will pre-select the country/state combination you choose, so that your customer's don't have to search the list for their country (this will come in handy if you sell to one country primarily)

Tax Rates

See "Taxes" section for more details on how to impose localized Country or other Regions (State/Province) taxes.

Affiliate Program

The affiliate program allows you the ability to offer commissions for sales generated. When the affiliate program is used, other businesses/websites can register as an "affiliate" and link to your storefront with a special URL. Anytime someone enters your storefront using the affiliate's private URL, sales can be traced back to the affiliate, allowing you the ability to pay commissions for these sales.

Initial Set Up

First, create a Menu/Link that links to the "affiliate page".
Next, be sure you enter your affiliate description, and agreement text located under "HTML Editor" in the Admin. The affiliate help appears on the left column of the affiliate pages; use this space to provide instructions, etc. The Description appears on the first affiliate page. The agreement text appears on the second affiliate sign-up page. Your new affiliates must agree to the terms of your affiliate program during the registration process, be sure to enter your terms & conditions under "agreement text".

Default Commission
The default commission is used when the affiliate first registers. You can also modify each affiliate's commission rate in the affiliate's profile.

How the Affiliate registration works
First, your potential affiliate would click on your affiliate tab or link. They will see your description and help page, and can click continue to begin the automated registration process. Next, they are prompted to accept your terms & conditions. Once they accept, the new affiliate is prompted for some basic company information. Finally, the Storefront will generate a unique URL & affiliate login ID. You can setup the affiliate "email confirmation" to automatically send instructions to your new affiliates. You should instruct your new affiliates to link to your site using this special URL, which is displayed on the last affiliate sign-up page, and can be included in the affiliate email confirmation (if you use the variable). Your new affiliate can use their affiliate login ID to update/view their company information, as well as any sales that have been generated by their special URL.

How the Sales are tracked
Once your affiliate links back to your website with the affiliate URL issued to them, sales can be tracked. Anytime a potential shopper visits your site using this affiliate URL, a special "cookie" will be saved on their computer to track their purchases. Should the visitor make a purchase, the order will be linked to your affiliate. By running the affiliate reports in the Admin, you will see how much commission to pay your affiliate.

Email A Friend

The Email A Friend feature is designed to let your customers send an email about your products, to themselves or others. When enabled, a special button or link will appear on the Item's page in your storefront. When pressed, your customer will be able to enter the email address of their "Friend", or they can enter their own email address, along with a private note/message.

The Storefront will send the recipient an email that will include a message you setup, plus the message your customer included, along with a link to the Item.

Initial Set Up

Go to Settings > Email A Friend. Click "Enable" to turn this feature on. Before enabling, you must make sure you have configured the basic Email settings (SMTP Server, Admin email address, etc), these settings are found under Settings > Email.

Customize the Message

Next, you are ready to enter the From Name, From Email address, Subject, and Message body for the Email A Friend email. The "From" names and email address is what the recipient will see.   You can customize the email message by adding or removing several variables (see below for an example).

To insert the Sender (your customer) information:
##SENDERNAME##
##MESSAGE##

To insert Item Details:
##ITEMNO##
##ITEMNAME##
##ITEMDESC##
##ITEMURL##

A typical message "body" might look like this:

This message was sent from: ##SENDERNAME##
Message: ##MESSAGE##
Item Name: ##ITEMNAME##

Item Description: ##ITEMDESC##
URL to Product: ##ITEMURL##

By moving, or removing these special variables, you can fully customize the message.

Digital Items

Download Method

Here you must specify the technology used during the download process. The "Stream" method is the more secure choice, files are streamed to the web browser and the location of the file cannot be determined by the user. While this is the preferred method for distributing file downloads, it can be problematic with some browsers (depending on the user's security & firewall settings). The "Physical Location" method is a traditional way of downloading; a URL to the file is used. When the user clicks a link (or is directed to a specific page), the browser downloads the file on its own using the real location of the file.

NOTE: Use the "Send it chunks" stream method is recommended if your file downloads are large, for example files that are more than 1 megabyte. Keep in mind this method can be used for any sized files, and may increase server performance regardless of the download size.

Download Availability

This setting determines when the user can download. When set to "Automatic", downloads are available immediately after an order is placed. This is appropriate when you use Authorize.net, or other real-time processing. It may not be the best choice if you want to verify payments before allowing downloads. Select the "Manual" method to hold downloads until you approve them.

To release the user's download, go to the Order in the Admin and click the "Status" tab. See the Enable Downloads options there.

Images

Image Sizes & Settings

Fix Thumbnail Image Sizes

To make your storefront appear more consistent, you can enable fixed sizes for images. This setting will force the web browser to resize the Thumbnail images to your specifications. Since most images you upload may have different sizes, this will help give a more professional look to your store.

NOTE: Image sizes are specified in pixels, dimensions. Entering zero will mean the image's actual size will be used. For example, if you only want to fix the width, for width enter your new dimension and leave the length as zero.

Randomly Featured Items

This setting affects the images that are associated with the RFI (Randomly Displayed Featured Items). Enter the exact pixels (Length X Width). If you want to only specify one dimension, you can enter a pixel size of zero.

Category/Feature/Search Lists

This setting affects the images that are shown on the List type pages. Enter the exact pixels (Length X Width). If you want to only specify one dimension, you can enter a pixel size of zero.

Shopping Cart

This setting affects the images that are displayed in the actual shopping cart, if enabled below. If you want to only specify one dimension, you can enter a pixel size of zero.

Hide Shopping Cart images

Use this option to hide, turn off, images that appear in the shopping cart. This may be necessary depending on the types of products you offer.

Default Large image size

This setting applies to the image that appears on the Item's detail page. The image is resized to these dimensions on when the "resize" option is checked for that item, go to the item in the Admin to enable this.

Category Image Sizes

This setting affects the sizes of the small and large images that appear on the category details page.

Image Upload

The Storefront has a built in Image upload component, so you can upload images without having to use FTP software or web tools. All images uploaded using this feature will be placed into the your "Images" directory on your web server.

Image to Upload

To upload images (for use in your products, items, categories, or any of the customizable pages) simply click on the "browse" button. Locate the image (typically a .GIF, or .JPG file) on your computer and select it. Next, click on "Upload". After the file is uploaded to the web server, you should see a preview (thumbnail) image and a confirmation message with the filename. You can click on the image or filename to see the full sized image.

If you experience difficulty, such as receive an error message similar to "access denied", than you must check your web server's security permissions. You must have "write" permission on the "Images"

directory in order for this function to work properly. It may be necessary to contact you web hosting provider if you do not host your own site.

You can maintain the images in the images folder here as well. The Admin will display a certain number of files at a time; it will group the images together by their filename. To see all images, click "ALL", or to see images that start with a certain letter, just click the appropriate letter.

To delete any files, check the "Delete?" box and then click the "Delete" button.

Default Colors

Colors & Fonts

The Admin has a built in page for setting your basic colors for text, buttons, and some headings. The Admin's Default Colors page gives you a starting point, but for more complex designs you may want to consider customizing the HTML template system. See the Template Customization below for more on this.

Font
You can specify the general font that will be used storewide.

Text
Here you can set the default colors for the basic storefront text.

Background
You can specify the background colors of the different sections of the storefront.

Borders
In conjunction with the backgrounds, you may also want to modify the borders for the sections.

Menu Tabs
You change the different colors and styles of the Menu Tabs (top menu buttons). To use your own images, or customize each tab separately, go to the Menu/Tab page (there you can specify on a Tab by Tab basis).

DropDown Menu
You can control the colors of OpenCube's Infinite Menus, aka Imenu. See Imenu in this documentation for more information on this menu.

Headings
Headings are located just above each UD section, above items, categories, etc. Here you can specify the default color & style. To use your own images or to change the colors or text for headings on an individual basis, click on "Headings" or "Language" in the Admin.

Buttons
You can specify the default color & style of the buttons in the storefront. To use your own images or to change the colors or text for buttons on an individual basis, click on "Buttons" or "Language" in the Admin.

Template Customization

For more sophisticated designs or layouts, you need to define your storefront's colors in the "template" rather than using the Admin's Color settings.

CSS
CSS (Cascading Style Sheets) is a standardized way of defining colors and font related attributes. The CSS code for the Storefront is usually located the "template.css" file. You can open and edit this CSS code in this file with Microsoft Notepad or any HTML Development software. It is not usually necessary to edit the forms or other asp/aspx files, just the CSS code in the CSS or HTML template files.

NOTE: Some knowledge of HTML/CSS is needed in order to customize the template files. We recommend that you contact your web designer/developer for assistance. For more on customizing the template, see the separate "Template Customization" Guide.

Page Layout

You can specify which storefront element (such as your User Defined/UD1-10 sections, Category List/TLC, or even featured items).

Page Width

This is the actual width of the Storefront pages, usually specified in pixels. Today, the standard size of a page should be around 960 pixels max, you would simply enter "960". However depending on your needs and the type of customer you have, you may feel the need to make the page appear larger or smaller. You can also specify a size in Percentage, for example if you entered "100%" the Storefront would fill the entire width of the page.   See notes below.

NOTES: While you can change the width to a percent (like 100% to fill the screen instead of 960 pixels), the problem is this... what looks good to you might look terrible on another person's browser. After all, every computer can have a different screen size, so with a percentage your store will not look the same to everyone (sometimes it may look bad, pages wrapped and text in odd places). The fixed width ensures that it looks exactly the same on every person's computer.

Some developers overlook this when designing sites and their great design falls to pieces on some browsers/computers. With a dynamic (database driven) site such as this storefront, where every page can be different, a fixed pixel width is ideal. Otherwise, you risk having unpredictable results on all the different monitor sizes. We recommend a page size of "800".

Main Columns

You must specify the size and spacing for your storefront columns. The Storefront has three columns, enter the amount of space (in a percentage) that each column should take up. In most cases you would also want to include a small space between the columns. Your total percents must equal 100.

Section Spacing

You can specify a height in pixels, for example enter 10 to add a space between (above or below) the sections.

Page Layout

For each different type of storefront page, you can specify what elements or sections appear where. Click on the magnifying glass icon to open the Layout Window. Here you will see the three columns of your storefront. You can select the different elements that should appear on that page type. If you leave the selection blank, nothing will be displayed. If a column has no elements selected (the entire column is blank), the entire column will be hidden and the other store columns will utilize this space. For example, you can have pages with one, two, or three columns.

Custom Pages

You can also specify the column layout for each custom page you setup. You can access the Layout Window from the custom page's setup, or on the master Page Layout setup.

Sub Category Option

Is some instanced you may not want sub categories to appear, you can enable/disable them here. Un-checking the "Show Subcategories" box will hide subcategories in the TLC/Top Level Category section. Your storefront will be faster with this turned off.

Page Content

The Storefront has a built-in HTML/content editor. There are two ways to edit content using the editor in the Admin:

1. Navigate to the category or item you want to change, and locate the "Detailed Description" buttons, usually just below the Short Description.

2. From the menu in the Admin, select Settings > Page Content. You will see a list of sections/areas in the Storefront that you can modify.

In most cases you can edit the section with the built in Content/HTML editor, which lets you use many formatting techniques, or you can edit the Raw text/HTML. This is useful if you want to insert your own code (or don't want to format at all, just plain text). Use the "Plain Text/Raw HTML" button next usually to the right of the normal Editor button.

Top (Logo)
This is the top most section of the storefront, located above the Menu Tabs.

Top banner
This is the section below the Menu Tabs and above the Search banner. The background color of this section can be changed under "Colors/Text". If inserting images, they should not exceed 700 pixels in width.

Area 1
This section is located between the search banner and the actual page columns

Area 2
This section is located between the page columns and the bottom banner.

Bottom banner
This is the section that appears at the very bottom of the page, the background color of this section can be changes under "Colors/Text".

User Defined
These sections are the Left/Right columns of each page in your site. The text or graphics you enter here will appear on the pages you have checked under "Colors/Text".

Order Thanks (credit card)
If you have "enabled" credit cards, this text or graphics will be displayed upon completion of the checkout process. Here you can insert the Order Number variable ("##ORDERNO##") or the Customer Number variable ("##CUSTNO##"). When your customer goes to this page, the variables will be replaced with either their order number or customer number. Beneath this message will appear a "View Order" button. Customers can click it to view their order details. If inserting images, they should not exceed 400 pixels in width.

Order Thanks (Pay by mail)
If you have "enabled" Pay by Mail, this text or graphics will be displayed upon completion of the checkout process. Here you can insert the Order Number variable ("##ORDERNO##") or the Customer Number variable ("##CUSTNO##"). When your customer goes to this page, the variables will be replaced with either their order number or customer number. This field should be used to give instructions for mailing payment. Beneath this message will appear a "View Order" button. Customers can click it to view their order details. If inserting images, they should not exceed 400 pixels in width.

Order Header

The Order Header appears at the top of the Order Summary (or order view) page. This is where you would place your logo or company address and any other relevant information.

Order Footer

The Order Footer field appears on the Order Summary (or order view) page. This is where you would place return policies, thank you messages, or any other notes.

Affiliate User Agreement

This appears 1st page of Affiliate Registration. Affiliates will be presented with this agreement, and will have to accept the terms of your agreement to continue with the registration. Place your terms and conditions here.

Menu / Links (Navigation & Tabs)

You can create Menus and Links (site navigation) with the Menu/Links functions. You can create Menu Tabs (which appear at the top of your site), Links (appear near the bottom as text links), and you can create a Custom Menu that appears on pages you specify (using the Page Layout functions).

Name

This is the text that will appear on the Tab or Link, try to keep these short as they can affect the look of your site.

Link Type

Imenu

Select this type if you wish to have this Menu item appear in the dynamic Imenu (see "Imenu" section below)

Tab

Tabs are the menu buttons near the top of the storefront (between the "Top Logo" & "Top Banner" sections). You can change the background or text color of the Tab under "Default Colors". If you want to use your own images (instead of the built in graphics), select "Use Image" and enter the URL to your image.

Link

When enabled, a simple text link will appear near the bottom of the storefront (just above the "Bottom Banner" section).

Custom Menu

When enabled, a text link will appear in your custom menu. You can force the custom menu to appear on any storefront page, see "Page Layout" help topic.

Row

This is the Row that the Tab/Link will appear. Rows are from bottom to top for example Row "1" appears as the bottom row. It you create too many tabs on one row, the storefront layout may be affected as the Tabs do not "wrap" into the next row.

Position/Order

This is the position in the row that they will appear, for example position "1" appears first on the Left. If you want the tabs sorted alphabetically, make them all the same number.

Link To

Home Page - This is the main page that appears when a user enters your site.

Category List - Displays a listing of all Top Level Categories (Categories that do not have a Parent Category assigned to them) and the short description.

Contact Us - A contact us form where visitors can email you from. You must also enable this under "Email" for the page to function

Features Page - This page lists all items that have the "Featured" setting turned on. The item name, small image, price, and a short description are displayed here.

Affiliates Page - This is the main page for Affiliates, they can register or login here.

Gift Certificates Page - This is the main page for purchasing Gift Certificates, see "Gift Certificates" help topic.

Wishlist Lookup - This is the main page for Wishlist functions, users can view Wish Lists here.

A Specific Category - You can link directly to a Category or Sub Category you have set up in your store.

A Specific Item - You can link directly to a specific Item in your store. Great for popular items or sale items. Enter the Item Number, as it appears on the item's page in the Admin.

URL - You can link directly to any outside URL (an outside web page).

Custom Page - This will link directly to a custom page.

DropDown Navigation Menu

The Storefront includes a "DropDown" navigation menu (powered by OpenCube's Infinite Menus). The menu is tightly integrated with the category & subcategory structure. You can enable the menu with just a few settings.

Manage Menu

Before any links will appear in the menu system, you will need to tell the Storefront which Menu/links should be part of the menu.   See "Menu/Links" in the Admin. To get the "Drop Down" effect, you must make sure that one or more of your "Parent Categories" is setup under Menu/Links and has "DropDown" toggled under the "Type".

Colors

The Admin has built-in settings for colors, below is a summary of the colors you can control.

Main Menu

Background Color:
Background Color (hover):
Border Color:
Text Color:
Text Color (hover):

Sub Menu

Background Color:
Background Color (hover):
Border Color:
Text Color:
Text Color (hover):

Basic Settings

Enable

To turn on the Menu, check this box.   Be sure you have setup some "Menu/Links" with the DropDown "Type" selected.

Menu Width

This is the total width of the Menu. You need to specify the width of the Menu in pixels, For Example: 800, a typical page width.

Dropdown Width

This is the width of each individual Main menu item. For the best appearance, you should divide the number of Main menu items you will have by the Menu Width. We recommend a width of 100.

Customization Notes: if you want to change the style, effects, or other aspects of the Menu, we encourage you to contact OpenCube about their CSS/DHTML menus. Because the Storefront is template based, you can purchase your own Menu, customize it for your site, and then simply insert the appropriate code into your "template.htm" file. Some experience with HTML (and other programming languages) may be required.

Custom Pages

The Storefront allows you to setup an unlimited number of custom pages, dynamic pages that consist of Top & Bottom headers, along with your own content.

Name

This is an internal name to help you identify this page. This text will appear as the page heading, if you have not setup a Page Heading.

Page Heading

This is the heading that will appear above the page's body (Page Content). Like all other storefront headings, you can specify text, colors, style, and images.

Page Layout

For each custom page, you can specify what other elements appear (and in what order). For example, you can have other "UD" sections appear on your page.

Page Content

This is the main body (middle column) of your page. This area is edited with the built-in HTML content editor (or you can edit in text only/raw html mode). If you do not select other elements in the page layout, the Page Content will fill the entire page (all 3 columns)

Custom Meta-Tags

For each custom page, you can create a set of unique Meta Tags. These are the internal descriptions and keywords that are used by search engines to categorize and list your site (and this page).

Title, Keywords, Description
These fields should be carefully used, do not use HTML code or foreign characters in these fields. These fields are invisible to your users, but not to "search engine robots". When you submit your site to a search engine, the search engine will "spider" (follow your links in) your website and read the content. It will use the Title, Keywords, and Description to better categorize and rank your site.

Mobile Support

Mobile Pages

In addition to traditional computers and browsers, some of your customers may browse your Storefront using mobile devices like phones and tablets (iPhone, iPad, Android, etc.). When mobile support enabled, the Storefront will display your content in a better format for mobile devices. In other words, people browsing your website from a mobile phone, such as an iPhone, will see the pages in a different (more appropriate) format.   In most cases the item and category page content shown is simplified to give a faster experience.

Responsive Design
This is the Google Recommended option. All pages are served on the same Url, however the page's content may appear differently depending on the device's screen size. You can customize the "template-responsive.css" file in your shop directory to optimize how content appears on different screens.

Old Method
The old method (where Mobile pages are served on a separate Url) is no longer recommended. The older method uses an Open source mobile phone detection script to redirect mobile devices to your mobile pages. 100% Accuracy of Mobile device detection is not guaranteed and there are display limitations. Consider the Responsive Design method instead.

Text/Language

The Storefront has integrated Language (text) controls so you can change any of the default Text, Messages, Buttons, and headings right in the Admin.

Buttons

Any button and some text links you see displayed in the storefront can be edited here. You can use your own images, change the text, or even change the type of button.

Text

This is the text (words) that will appear on the button (applies to all buttons except when an image is used).

Text Color

This is the color of the text that appears on the button (does not apply to images).

Background Color

This is the color of the text that appears on the button's background (does not apply to images).

Button Style

To make your storefront unique, you can also specify different types of buttons, or use your own images. When "Use Image" is selected, you can enter an URL to your own image, or you click the Image icon to insert images that are already uploaded to your images directory.

Error/Text Messages

Here you can edit some of the longer messages that are displayed. You can change the text displayed when an error occurs, etc.

Section Headings

The Section headings are the Text or Graphic headings that appear above the different sections of your storefront. You can change the text, type of graphic, and even use images for headings.

Form/Field Headings

Here you can change/rename the headings or field descriptions. These are usually shorter descriptions or field names.

Facebook / Twitter

The Storefront is pre-integrated with popular social networking sites, such as Facebook and Twitter. With these features you can easily and instantly add links & buttons to your storefront pages, which may help you to promote your business.

Facebook Page Button

If you have a Facebook page for your business, enter the URL to your Facebook page. Be sure to enter the URL to your Facebook Page that Facebook provided you with (don't just copy & paste the URL to your profile). A Facebook page URL would be similar to this: http://facebook.com/mypage/ if you have not created the Facebook page URL yet, login to your Facebook account and locate that option.

Facebook Like Button

You can enable this button to display the Facebook Like button along with your items. This is a great promotional tool, allowing visitors of your site to indicate that they like your items.

Twitter URL Button

If you know your twitter Url Address, you may enable this button. Be sure to enter the URL to your twitter account, which would be similar to this: http://www.twitter.com/yourusername/.

Twitter "Tweet" Button

This is a great promotional tool, allowing visitors of your site to tweet about your items. The Storefront will automatically configure and include this button when enabled.

User Security

Users

Under the User Security section in the Admin you will see all the users that you have been setup with "Administrator" privileges (access to the Admin).

Passwords & Security Level
For each user you can assign a password and a security level. There are two levels of security, Level 1 and Level 2. A Level 1 user has full access to Admin; Level 2 users cannot access any setup pages (they typically would have no access to any Admin pages under "Settings" or "Advanced".

To add a new user, click on "Add User". Simply type a username, and password (be sure to confirm the new password). Choose the user level, then click on save. **All Admin passwords, as well as customer passwords are stored in an encrypted state within your database. If you or anyone else were to open your database directly, they would not see passwords.

If it becomes necessary to change a user's password, navigate to the user under User Security. Next, in the "New Password" and "Confirm Password" fields type the new password. Remember, only Level 1 users have access to this page. We recommend that only 1 user (a manager) have Level 1 access. At any time, you can also change a user's access level.

In the event you need to remove a user, simply click on the user from the User Security page. Next, check the "delete this user" checkbox and click on save. You will be prompted to confirm before deleting.

NOTE: This security area is NOT related to your customer's logins. The User logins here are for Administrative access, for the Admin logins. To manage your customer's passwords or account, see "Customers" in the Admin.

Secure Pages (https)

The storefront can be set to secure pages that contain sensitive information, such as checkout/payment pages, login pages, and your entire Admin. Before you enable the Secure Domain/Url (https), you must obtain an SSL Certificate. Typically you can purchase an SSL Certificate through your web host, and they will install this for you. Contact your web host or server administrator for help with this.

How to Enable
See Web Address (Domain/Url) in the Admin to use the Storefront with your SSL Certificate. In the Secure Domain/Url field you enter your https Url. Use the Test button next to the field to ensure it is installed correctly before enabling. While not recommended, you can use a "Shared SSL" if your host provides one.

Enable Secure Url

After testing the Secure domain/Url, you can enable it in the Admin. All checkout, sign-in, order status, etc. pages will then be served over the secure domain/Url.

Test URL
It is strongly recommended that you Test the URLs before you save them. Using the 'Test' button located to the right of the field, you can see if you entered the correct URL. When pressed, a new window will open and you should see the words "Test Passed" in bold lettering. If you get a message such as "The resource cannot be found", than the URL you entered is incorrect. You will need to correct the entry and Test again before saving.

Export

Because the Storefront is database driven, order & customer related data is captured and stored. In some instances, you may want to "Export" this data (to compile your own reports, or import into your own software)

Data Format

During an export process, the Admin export functions create a file on your server. You can download this file later to your PC for your own use. There are two types of common formats, Tab Delimited (*.txt) and Comma Separated (CSV). Both formats are widely universal, and can be imported or opened with other programs. For example, CSV is most appropriate if you want to open the exported data using Microsoft Excel.

How to Export

The first step is to select a format. Next, enter the date range if applicable, and then click on the "Export" button. A pop-up window will appear informing you of the export process. Once the export is complete, you will need to download the exported file to your PC. In the Admin, click "Download" and you will see all files in your "export" folder. You should delete these files once you have successfully downloaded them.

Export Types

Order Summary

This function exports a summary of the orders for the date range specified. It would contain all of the basic information about the orders.

Order Detail

This function exports the "Line Items", it will create a file that will contain a separate record for each item purchased.

Customers

This function exports a complete list of your customers, this is useful if you want create mailing lists, send bulk emails, etc. Also see Newsletter Opt-in below.

Newsletter Opt-In List

This function exports your customers that have opted to receive your newsletter or mailing. See Newsletter Opt-in section in this guide under "Checkout Flow". Only customers that have selected this option will be included in this export.

Affiliates

This function exports a complete list of your affiliates, this is useful if you want create mailing lists, send bulk emails, etc.

Google Merchant Data Feeds

This export is designed to give you a starting point for your Google Merchant feeds, previously known as Google Base or Froogle. Typically you would export this data, then edit the file as needed, and finally submit/upload to Google.

See the "Google Feed" button on each item's setting page to customize the Google Feed Attributes and Product Variants. Select Tab Delimited (.txt) for a pre-formatted data file or select CSV for an Excel type document (then, follow Google's documentation for editing, formatting, and uploading). Visit the Google Merchant Center and see their Feed Specifications for more details.

T-Hub QuickBooks Export

If you use QuickBooks, you can use this format in conjunction with the T-Hub service to synchronize your sales data with QuickBooks. This export is specifically formatted to meet the T-Hub standard. T-HUB is a multi-channel Order Manager solution designed to integrate your ecommerce stores with QuickBooks and Shipping services. Contact atandra.com for more information about this service.

SiteMap Generator

The built in sitemap tool can be used to create a standardized xml sitemap file. SiteMap files are often used with search engines, such as Google, and other applications.

Import Data

NOTE: Be sure to back up your database before attempting to import data. Contact your web host or Sever Admin about their procedures for backing up databases.

Data Format

The built in Import Tool is designed to accept Microsoft Excel formatted files. This is a common format for uploading/importing. If the data you wish to import directly into the Storefront is not in a Microsoft Excel format, in most cases you can open your data using Excel and save it in an Excel format.

Steps

There are several steps to importing. Before proceeding with any steps, be sure you have a current backup of your database (should something unforeseen happen).

Step 1

The first step is to select a file that is already uploaded (on your server in the "import" directory), or you can upload a new one. The Storefront accepts Microsoft Excel formatted files only.

Step 2

You are now prompted for the "Sheet". Microsoft Excel files can have multiple sheets (pages of data) in a single file. Select the sheet your data is located in.

Step 3

This step requires the most attention. You will now need to "Map" your data columns to the most appropriate data column in the storefront.   Be sure you select the correct columns or you may end up with improperly formatted items or system errors.

You will also need to select the Storefront category that your new items should be created in. If you have not already done so, you should create a new category for your items.

Once you press "Start Import", the Storefront will read your data, column by column, and match the data in your column with the Storefront field you selected. It will create a new item according to your selections.

Duplicate Items

If you attempt to import an item with an "Item Number" (aka "itemno") that already exists, the new item will not be created. Instead, the existing item will be updated (all data will be replaced with the new information). In these cases the category will be ignored, and the item will be left in its original category.

Google Analytics

This feature allows you to quickly add Google Analytics to your storefront, without having to add any code.

Website Profile/Account Number

First, you must contact Google and sign up for Google Analytics. They will provide you with an Analytics Account or Profile Number. You should see this number in your Google account, which usually looks something this: UA-123456-1. This number is used to uniquely identify your website with Google.

Enabling

Before turning on the Google Analytics feature, be sure you have entered the correct Account or Profile number.   Once you have enabled this feature you should begin to see tracking data about your Storefront pages in your Analytics account (it can take days however for data to appear).

NOTE: Your Web Developer is not affiliated with Google, nor can we provide any guarantee this feature will always be supported by Google. For assistance with Google Analytics, please contact Google directly. Your Web Developer does not provide any technical support for this feature.

Currency, Number, Date Formatting

The Formatting settings can be used to change how numbers, currency, and dates are formatted (displayed). This is used mostly for international web sites (Non-US). The default settings in the Storefront are typical for U.S. merchants. We do not recommend making changes to these settings

Use web server Language/Regional settings

This is RECOMMENDED. When this option is selected, your web server handles all Data formatting automatically. However your web host (or server administrator) has configured the regional settings will determine how numbers, currency, and dates are formatted.

Use Re-Formatting

In order to override the web server's default settings, you will need to toggle the "Use Re-Formatting" option. When enabled, the Storefront will override your web server's regional number, currency, and date settings, with the settings below.

Currency

1st Symbol

This is the symbol or character you want to appear BEFORE numbers in your currency. In this example "$19.99 USD", the dollar sign ($) is the first symbol.

2nd Symbol

This is the symbol or character you want to appear AFTER numbers in your currency. In this example "$19.99 USD", the USD is the second symbol.

Separator

The separator is the character or symbol that appears in the thousands place. In this example, "$5,000.00" the comma after the 5 is the thousands separator. Depending on your local currency, you would probably want this to be either a comma (,) or a period/dot (.)

Decimal Symbol

The decimal symbol is the character or symbol that appears after the whole numbers. In this example, "$5,000.00" the dot/period just before the last two zeros is the decimal symbol. Depending on your local currency, you would probably want this to be either a comma (,) or a period/dot (.)

Numbers

Separator

The separator is the character or symbol that appears in the thousands place. In this example, "5,000.00" the comma after the 5 is the thousands separator. Depending on your region, you would probably want this to be either a comma (,) or a period/dot (.)

Decimal Symbol

The decimal symbol is the character or symbol that appears after the whole numbers. In this example, "5,000.00" the dot/period just before the last two zeros is the decimal symbol. Depending on your region, you would probably want this to be either a comma (,) or a period/dot (.)

Dates

Separator

The separator is the characters or symbol that you want to display between the Year, Month, and Day in your dates. This would typically be one of the following: (/) (−) (.)

Format

You can choose in which order the Year, Month, or Day appears. Choose what is most commonly used in your region.

Troubleshooting Errors

The settings discussed here are advanced settings used for behind the scenes re-formatting of data when the Storefront saves to your database. If you encounter an error message when saving currency, numbers, or dates, you may need to alter these defaults. Otherwise, normally you should not adjust these settings.

Database Compatibility (Error Correction)

These settings are for database compatibility purposes only. If you encounter error messages when saving currency, numbers, or dates, you may need to alter the defaults.

Fix Database Syntax Errors

In some instances, you may need to check the "Fix Syntax" error option. This can be useful if your web or database server has currency or number regional settings that conflict with the default settings.

ONLY enable this if you are in fact encountering a "Syntax" error related to numbers or currency.

Fix Database DateTime Format Errors

If you receive an error when saving Dates, you may need to modify the default Date Separator or Date Format. These settings will NOT affect how Dates appear in the storefront. Use the "Settings" tab options instead.

This setting is for correcting database errors related to your web server or database server's regional settings. In most cases you do not need to change these settings. ONLY change these settings if you are receiving an error message or problem with saving dates.

Fix Database Decimal placement Issues

If you receive an error when saving Numbers or Currency, or if the Number or Currency is not saving correctly (for example, you enter 500.00 and it saves it as 50,000.00), you may need to modify the default decimal character. These settings will NOT affect how Numbers or Currency appear in the storefront. Use the "Settings" tab options instead.

This setting is for correcting errors or decimal placement issues related to your web server or database server's regional settings. In most cases you do not need to change these settings. ONLY change these settings if you are receiving an error message or experiencing a problem with the decimal placement in numbers or currency.

Multi-Currency

The storefront is capable of displaying prices in different currencies. Customers will be able to switch between currencies easily.

Enable Multi Currency

In order for additional currencies to appear, you must enable the multi currency feature. When enabled, you must setup the different currencies you support.

Primary Currency

All prices shown will be based on your primary currency. This is the default currency you receive payments in from your merchant bank or payment gateway for example.

Name
The Name should be your 3 letter currency or a familiar name, for example "US Dollars".

Currencies & Exchange Rates

Display Name
The Name should be the 3 letter currency, or a familiar name, for example "Euro".

Exchange Rate

The exchange rate is the number used to determine the price in the additional currency, as compared to the primary currency. For example, if your primary currency is US Dollars, and you were setting up an additional currency for the Euro, you would first want to find the exchange rate going from "US Dollar" to "Euro". On the day this was written that rate was "0.7689" according to money.cnn.com, so you would enter this number as the exchange rate. It is recommended that you check and update the exchange rates regularly; otherwise the prices shown in the additional currency may not be accurate.

1st Symbol

This is the symbol or character you want to appear BEFORE numbers in your currency. In this example "€19.99 EUR", the Euro sign (€) is the first symbol.

2nd Symbol

This is the symbol or character you want to appear AFTER numbers in your currency. In this example "€19.99 EUR", the EUR is the second symbol.

Separator

The separator is the character or symbol that appears in the thousands place. In this example, "€5,000.00" the comma after the 5 is the thousands separator. Depending on your local currency, you would probably want this to be either a comma (,) or a period/dot (.)

Decimal Symbol

The decimal symbol is the character or symbol that appears after the whole numbers. In this example, "€5,000.00" the dot/period just before the last two zeros is the decimal symbol. Depending on your local currency, you would probably want this to be either a comma (,) or a period/dot (.)

Multi-Language

The storefront is capable of automatically displaying your content in over 50 different languages, powered by "Google Translate".   This translation tool eliminates the need to type and translate your product, category, or custom page content over and over in different languages.

Google Translator

When you enable the Google translator, your storefront pages will automatically initiate the Google Translator, and a language option will appear at the top of the page. Your customers will instantly be able to select the desired language.

Default Language Code

This should be set to the language code that your content/descriptions are written in. For example, "en" would indicate the default language is English. Below is a list of acceptable language codes:

Language	Code	Language	Code
AFRIKAANS	af	ITALIAN	it
ALBANIAN	sq	JAPANESE	ja
ARABIC	ar	KOREAN	ko
BELARUSIAN	be	LATVIAN	lv
BULGARIAN	bg	LITHUANIAN	lt
CATALAN	ca	MACEDONIAN	mk
CHINESE	zh	MALAY	ms
CHINESE_SIMPLIFIED	zh-CN	MALTESE	mt
CHINESE_TRADITIONAL	zh-TW	NORWEGIAN	no
CROATIAN	hr	PERSIAN	fa
CZECH	cs	POLISH	pl
DANISH	da	PORTUGUESE	pt
DUTCH	nl	PORTUGUESE_PORTUGAL	pt-PT
ENGLISH	en	ROMANIAN	ro
ESTONIAN	et	RUSSIAN	ru
FILIPINO	tl	SERBIAN	sr
FINNISH	fi	SLOVAK	sk
FRENCH	fr	SLOVENIAN	sl
GALICIAN	gl	SPANISH	es
GERMAN	de	SWAHILI	sw
GREEK	el	SWEDISH	sv
HAITIAN_CREOLE	ht	TAGALOG	tl
HEBREW	iw	THAI	th
HINDI	hi	TURKISH	tr
HUNGARIAN	hu	UKRAINIAN	uk
ICELANDIC	is	VIETNAMESE	vi
INDONESIAN	id	WELSH	cy
IRISH	ga	YIDDISH	yi

Please note: Contact Google for assistance with Google Translator. We do not provide support for Google Translation services.

URL Re-Writer

The Storefront has a basic URL re-writer built in, that requires no external or server side URL re-writer software or IIS module. The purpose of the Url Re-Writer is to provide more user and search engine friendly Urls. If you are not familiar with Urls or what a Url Re-Writer is used for, than you probably do not need to use this feature.

This is an advanced feature for web professionals, in most cases when building your web pages (including product, category, custom pages, etc) you don't need to really worry about the Urls. By default the Storefront automatically generates dynamic Urls for you, which are already compatible and optimized to work with search engines.

Normal URLs

This is the default setting. The Storefront automatically generates and manages the Urls in the traditional Microsoft ASP style. This is the recommended option; essentially the Url Re-Writer is not enabled.

Advanced URLs

Advanced Urls override the normal URLs. You can manually create the URL folder names, or let the Storefront automatically generate/manage the Urls. Use caution when enabling either of the Advanced Urls. If you have already launched your website using normal Urls (or were using a previous version) and your pages are already indexed in the search engines, changing these settings now may significantly impact your search engine ranking (it may not necessarily help, but could hurt your ranking).

Friendly URL Names (Manually Created)

This option lets you selectively assign what are known as unique "Url names" to items, categories, and custom pages. When this option is enabled you will see a special "Re-Write/Friendly Url Name" field for the item, category, or custom pages.   You can optionally enter a word or words, or a folder path, but you must only use characters allowed in Urls, for example you cannot use spaces or non-Ascii characters. An example of a URL name would be "your-product-name" or "some-really-great-keywords". The Storefront would then generate a URL similar to this, "www.yourshop.com/page.aspx/some-really-great-keywords/" for the item, category, or custom page. If you leave the field blank, a Normal (dynamic ASP) URL will be used for that item, category or custom page. Please Note that with this option no two URL names can be the same, you will receive an error if you try to reuse the same Url Name.

Friendly Urls Names (Automatic)

This option turns the fully automatic Url Re-Writer on, the Storefront will automatically re-write the item, category, and custom page Urls based on the "Name" field. So the item, category, or custom page's name will determine what word or words are using as part of the URL name (spaces and any non-Url friendly characters will automatically be removed). The Storefront will also append a unique identifier to the end of the URL, to ensure no two Urls are the same.

Troubleshooting

Please note, changing these settings after you have launched your site or after pages have already been indexed could have adverse affects with search engines. We recommend using caution with these settings.

Data Caching

Because the Storefront is built on Microsoft's .Net Platform, the Storefront can now take advantage of the many features a .NET web server offers. One of the key features introduced with .Net was its "Caching" abilities; the ability to cache data in the server's memory (rather than opening the Storefront database each time content is needed). The Storefront can serve web pages faster, and handle a higher volume of page requests!

Enable Server Caching

By default caching is enabled. However, there may be situations where you would like to disable (turn off) this feature. Uncheck this option to temporarily or permanently disable the caching feature.

Clear Cache

This setting is quite simply used to "Clear" the server's memory of any data that the Storefront is temporarily storing. In most cases, the Admin should clear & update the server's cache as you make changes to items, categories, or other Storefront content. However, you may come across some situations where you make changes in the Admin, and they do not take effect (you see it the "old" way in the storefront). If this occurs, simply clear the server's cache using this feature. This operation is safe, and will not delete any site content or any data in your database. The memory will be cleared, and on the next request the Storefront will re-load the requested data from your database or Storefront files (you may notice a decrease in site performance for a while after this until the cache is up to date).

Troubleshooting

If you have a "shared" web server, multiple domain names (i.e. your primary domain name and secure domain/Url names differ), multiple application directories, or if you have other asp.net pages (other than this storefront) running on your server, it may be necessary to disable the caching functions. In some situations caching conflicts may arise, in where storefront data may be displayed incorrectly or may disappear. Disabling the caching feature will resolve these issues.

Advanced Database Tools

Below are additional, more advanced, features (available in some versions only). Please note some of these features must be enabled in your web.config (contact your web master or developer for assistance).

NOTE: We strongly recommend making a backup copy of your database before using any of these advanced tools.

Database Format/Upgrade Tool

This tool is only for use during installation, or when applying an update. See the "Installation" guides before using this tool, or contact your web master/developer.

Database Cleanup Tool

This tool is used for cleaning up your database, it is recommended that you run these procedures on a regular basis.

Remove old/abandoned Shopping Carts

This option will remove all data in the "orderdetail" table that is no longer needed. When a customer begins checkout in your storefront, some data is temporarily stored until they complete checkout (place the order). If your customer does not complete checkout, over time than this data can remain in your database (this can lead to a large/slower database).

Remove any temporarily stored credit card data

This option will remove some credit card data that might have been stored as the result of a server error or failed transaction attempt. If you are using a payment gateway, we highly recommend that you run this procedure regularly, to ensure that all temporary credit card data has been removed.

Delete all 'Incomplete' orders (Abandoned orders)

This option will delete (permanently remove) any orders that have a status of "Incomplete". You cannot undo this procedure; once orders are removed they cannot be recovered. Orders may be in the incomplete status for various reasons, but in most cases incomplete orders are abandoned orders (a customer began checkout, and for whatever reason did not complete the purchase).

Remove All Credit Card Data

This option will delete (permanently remove) any credit card data that was stored in an order. You cannot undo this procedure, once this information is removed from an order it is not possible to recover this data. NOTE: We do not recommend storing credit card data, therefore we recommend running this procedure often if you are strong credit card related numbers for temporary reasons.

ATTENTION "Microsoft Access" Users:

If your database is MSAccess format, it is recommended that you do your own "Compact & Repair" shortly after running any of these procedures. Microsoft's tool will shrink the database file and check it for errors. If you don't the Microsoft Access program, you will need to purchase it. Contact Microsoft for support related to that tool or software.

Web.Config Protection (Encrypt Connection Strings)

This procedure will encrypt the web.config file located on your server, hiding all database connection strings and other application settings. This tool is very advanced, and should be used by an experienced web master/developer only. If you are not sure what the "web.config" is, contact your web master or whoever installed your Storefront & admin before running this tool. This tool can only be used if your web server is running ASP.NET 2.0 OR HIGHER.

Re-Encrypt Data (Change Encryption Key)

This procedure will re-encrypt all data previously encrypted with the new encryption key you enter. This tool is very advanced, and should be used by an experienced web master/developer only. If you are not 100% sure what a "web.config" is or what your "Encryption Key" is, contact your web master or whoever installed your Storefront & admin before running this tool.

This tool will Decrypt then Re-Encrypt all the passwords, credit card numbers, and some other sensitive setup data that is stored in your database in an encrypted state. The purpose of this tool is to allow you to change the encryption password/key you are using. Make sure you fully understand the implications of this tool before using. You will need to know how to edit your "web.config" file. You will need to change your encryption key ("cryptpass") immediately after running this procedure. If you stop this procedure before it completes, or if you do not change the encryption key in your web.config immediately when it completes, it is possible you could become locked out of your Admin and/or passwords and sensitive data such as credit card numbers may become unreadable.   IMPORTANT NOTE: You MUST make a backup of your database before running this procedure, in case something unforeseen happens during this process.

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