Shopping Cart

Users' Guide

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1. INTRODUCTION

OBJECTIVE

This guide covers the basic steps on how to maintain your online store, once the Setup has been completed by KDI's Web Administrator.

After reading this manual, you will have a better understanding about:

- Viewing your Orders, Customers, Reports
- Work with Advanced Order Processing
- Deleting Order and Customers
- Adding, Editing and Deleting Products
- Adding, Editing and Deleting Attributes
- Adding, Editing and Deleting Categories
- Adding, Editing and Deleting Sales Tax
- Working with Shipping

ADMIN CONSOLE

The Admin Console is the destination from which you can manage your entire online enterprise. You can access the Admin Console using a browser and keying in the URL provided by the KDI Web Administrator. For Instructions on how to access the Admin Console see Section Logging In on page 3.

MENU ITEMS

From the Admin Console there are a list of menu items to choose from. Each menu item is a link. Clicking on a link brings up a new window in the admin console. Starting on the next page is a list of the menu items in order from top to bottom.

Setup

This link will invoke the setup script that is used to store variables critical to the functioning of your Store. Most likely your setup has been run for you by KDI's Web Administer. You can, however, make changes by clicking on the other links in the Admin Console. If at anytime you need to re-run the setup, please contact the Web Administrator at KDI.

Home

This link takes you to the homepage of your Store.

The View Menu

From this menu you can view and make changes to your Orders, Customers and Reports.

The Add/Edit Menu

This menu allows you to make changes to your Products, Attributes, Categories, Sales Taxes, and Shipping Information.

ODBC Reset

This link will release your database from the Cold Fusion Server and should **ONLY BE USED BY THE KDI WEB ADMINISTRATOR**.

Password/Template

This link allows you to change the admin password or store template without re-running the setup script altogether. **Note:** If you make a change to the store template, you must hit **Refresh** on your browser. Next, you will need to click the **Home** link from the Admin Console menu in order to see the change.

Setup CC Processing

This link will make changes to the Credit Card Process and should **ONLY BE USED BY THE KDI WEB ADMINISTRATOR**.

2. INSTRUCTIONS

LOGGING IN

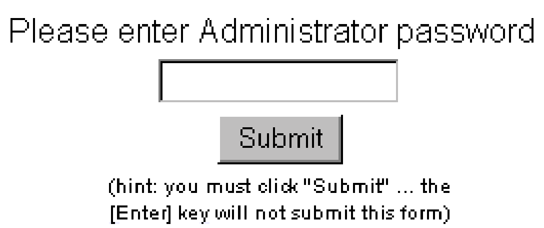
1. Open up a browser on your pc.

2. In the Address field key in www.yourcompanyname.com/store/admin and then hit the **Enter** button on your keyboard.
   The **Password Administration** screen will appear. See Figure 1, below.

3. Type in your **Administrator Password**, and then click on **Submit** button.
   The **Administration Area** will appear.

Note: You must click **Submit** button, as the **Enter** key will not submit this form.

Figure 1: Logging In



ORDERS

The Orders Link allows you to view your orders. From this link you can also do Advanced Order Processing and when the order has been shipped you can remove the order from the system.

Viewing Orders

1. Click the **Orders** link on the menu.
   A List of orders will appear. The orders are listed by number / date, so the most recent orders will appear at the top of the list.
2. Click the on an order to view the details.
   All the details for the individual order are listed. See Figure 2: Viewing Order Details, below.

Figure 2: Viewing Order Details

Date: 05-Feb-02
Name: John Smith
Address -1234 Main Street
Address -
City, State Zip: Abbotsford, British Columbia V2S 4K1
Country: Canada
Phone: 604-555-1212
E-Mail:johnsmith@mycompany.com
Credit Card: Visa

Item			**SKU**	**Price**	**Qty**	**Total**
Birdhouse Kit	Canada		009	25.00	1 each	25.00
Lodge	Canada	Canada	002	35.00	1	35.00
Order SubTotal						$ 60.00
Shipping (Priority Courier)						10.11
Sales Tax						8.40
Order Total						**$ 78.51**

Ship to:
Name: John Smith Address: 1234 Main Street City, State Zip: Abbotsford, BC Country: Canada

Advanced Order Processing

1. Click the **Orders** link on the menu.
   A List of orders will appear. The orders are listed by number/date, so the most recent orders will appear at the top of the list.

2. Click the order.
   The **Advanced Order Processing** link appears at the bottom.

Note: The **Advanced Order Processing** link only appears if the customer self-service was enabled during setup process.

3. Click the **Advanced Order Processing** Link.
   Another browser will open up and a new window will appear. The Upper frame lists the customer's personal and credit information and the customer's orders. The bottom frame lists the details for each order. From this frame you can set the order status. See Figure 3: Advanced , below.

4. Click on the **Order #** you want to change the status for.
   The bottom frame will display the corresponding Order Number details.

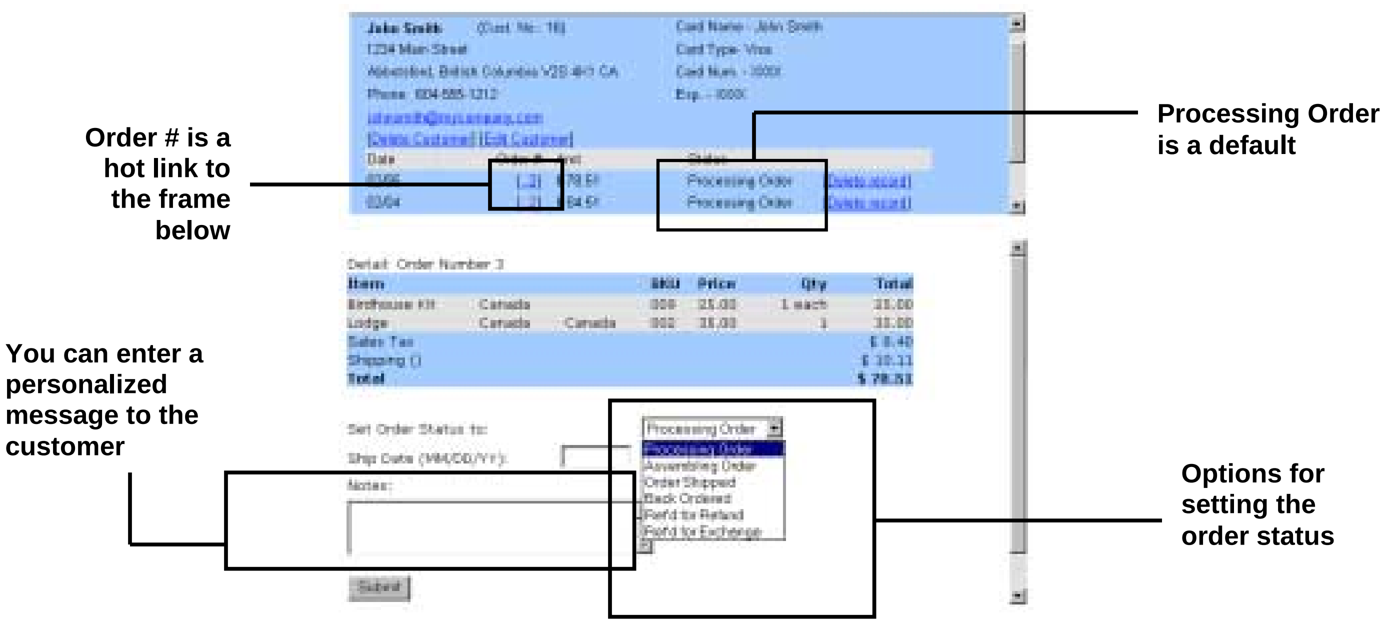
5. Click on the drop-down menu in the **Order Status** field.
   A list of statuses appears.

6. Choose a status by clicking on it.

Note: If **Order Shipped** is chosen, the ship date defaults to the current date, unless a date is manually entered in the **Ship Date** field.

7. Click the **Submit** button to confirm the new Order Status.
   The system has recorded the new status for the order.

Figure 3: Advanced Order Processing



Deleting An Order

1. Click the **Orders** link on the menu.
   A List of orders will appear. The orders are listed by number/date, so the most recent orders will appear at the top of the list.
2. Click the order.
   The **Delete Order** link appears at the bottom.

Note: The **Delete Order** link only appears if the customer self-service was enabled during setup process.

3. Click on the **Delete Order** link to continue.
   A message appears stating that the order was deleted.

CUSTOMERS

The Customers Link allows you to locate and view your Customer Details. From this link you can also edit, delete and e-mail any customer.

Locating A Customer

1. Click the **Customers** link on the menu.
   The customer query display appears. This query tool allows you to locate your customers by last name, last order date, order amount or order status. See Figure 4: Finding a Customer, below.

Note: The default is set at locating customers by order date.

2. If you are locating a customer by last name click on the corresponding letter in the Alphabet tool bar. If, however, you are locating a customer by order date, order amount or order status. You need to fill in the appropriate parameter fields and then click the **Submit** button. A results page appears as shown in Figure 5: Search Results, below.

Figure 4: Finding a Customer

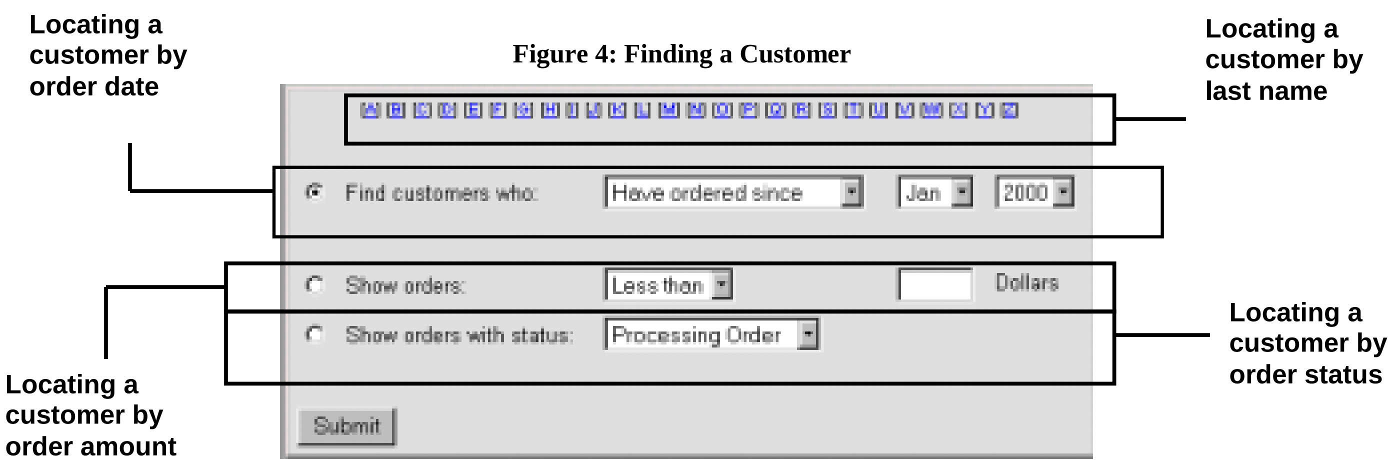


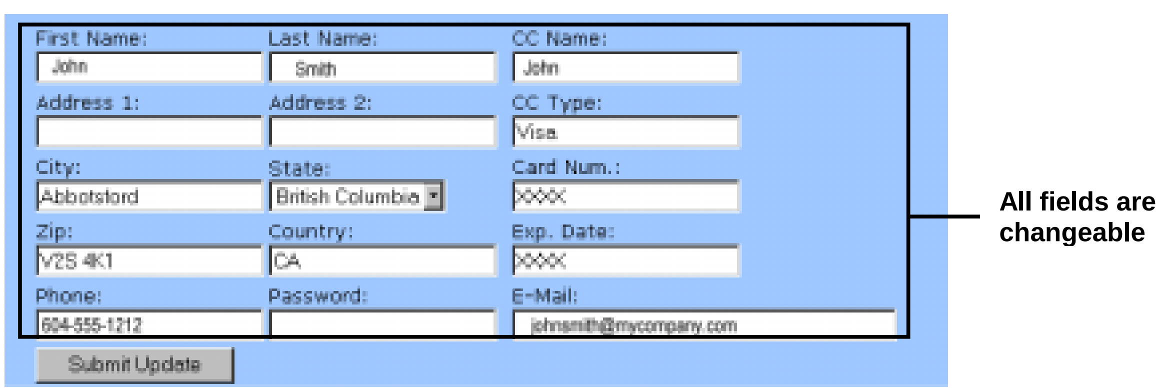
Figure 5: Search Results

Editing Customer Details

1. Click the **Customers** link on the menu.
   The customer query display appears. This query tool allows you to locate your customers by last name, last order date, order amount or order status. See Figure 4: Finding a Customer, above.
2. From the search results, click on the name of the customer.
   The Customer page appears. See Figure 6: Customer Page, below.
3. Click on the **Edit Customer** link.
   The Edit Customer page appears. See Figure 7: Edit Customer Page, below.
4. Make changes to the appropriate fields, and then click on the **Submit Update** button.
   A message appears stating that the Customer has been updated.
5. Click on the **Back** link to return to the Customer page.

Figure 6: Customer Page

Figure 7: Edit Customer Page



Emailing Customers

1. Click the **Customers** link on the menu.
   The customer query display appears. This query tool allows you to locate your customers by last name, last order date, order amount or order status. See Figure 4: Finding a Customer on page 7.

2. From the search results, click on the name of the customer.
   The Customer page appears. See Figure 6: Customer Page on page 8.

3. Click on the **E-mail this list** button.
   The Customer Relationship page appears. See Customer Relationship Page, below.

   An e-mail composition tool appears on the left and the customer list is on the right. Each customer has a check box by his or her name. Clicking on the **Select All** button above the customer list will automatically select each checkbox on the page. You can send the same e-mail message to every customer on the list by clicking on the **Select All** button. This will automatically select each checkbox on the page. You can also select individual recipients by manually checking each checkbox.

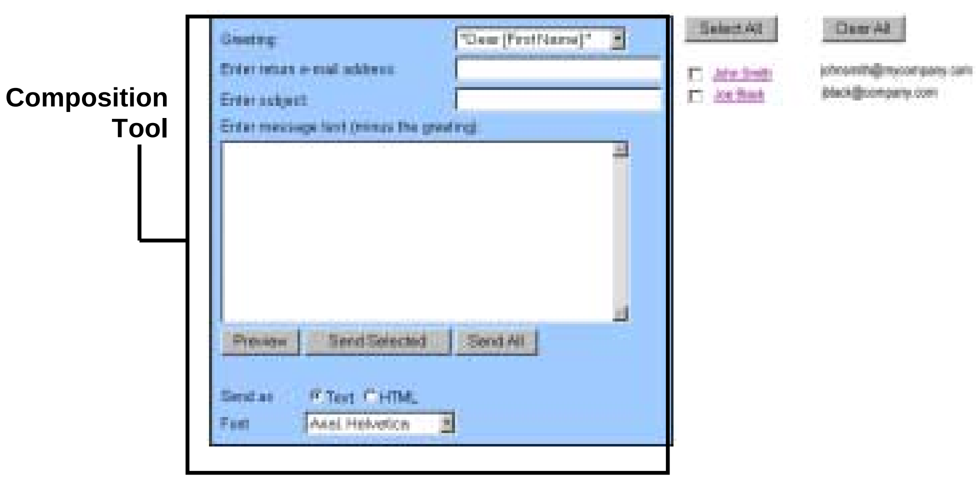
Note: Clicking on the **Clear All** button will clear the checkboxes.

4. Compose your e-mail using the composition tool.
   The e-mail composition tool also allows you to choose between HTML and plain text e-mail. If you choose HTML, you can further select a font. Clicking on the **Preview** button will show you the e-mail for the purpose of spell checking, etc.

5. Once you are satisfied with your e-mail, click on the **Send Selected** button.

Note: Clicking the **Send All** button will send your message to every customer in the database!

Figure 8: Customer Relationship Page



Deleting A Customer

1. Click the **Customers** link on the menu.
   The customer query display appears. This query tool allows you to locate your customers by last name, last order date, order amount or order status. See Figure 4: Finding a Customer, on page 7.

2. From the search results, click on the name of the customer.
   The Customer page appears. See Figure 6: Customer Page, on page 8.

3. Click on the **Delete Customer** link.
   A message appears stating that the customer has been permanently deleted.

Note: If there are still orders associated with the customer, the customer cannot be deleted from the system. Please delete all orders before deleting a customer record.

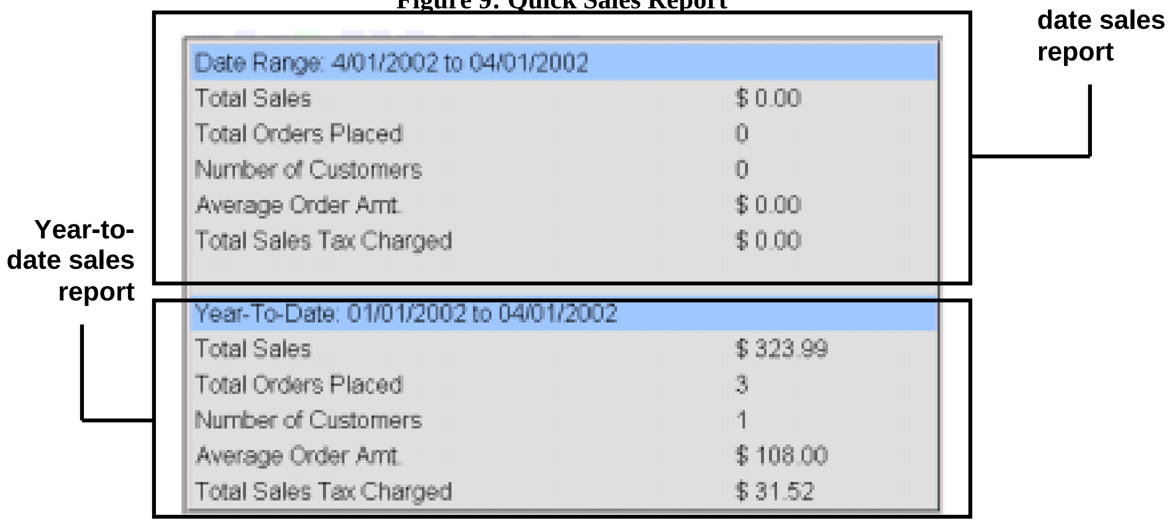
REPORTS

The Reports Link allows you launch three query tools in the main window. These Reports include; Quick Reports, Date Range Reports and Product Re-Order Reports.

Quick Reports

1. Click the **Reports** link on the menu.
   Three query tools appear in the main window. The topmost tool is Quick Reports.
2. In the **Quick Reports** box, click on the **Submit** button.
   A month–to-date and a year to date sales report appears in the main window. See Figure 9: Quick Sales Report, below.

Figure 9: Quick Sales Report



Date Range Reports

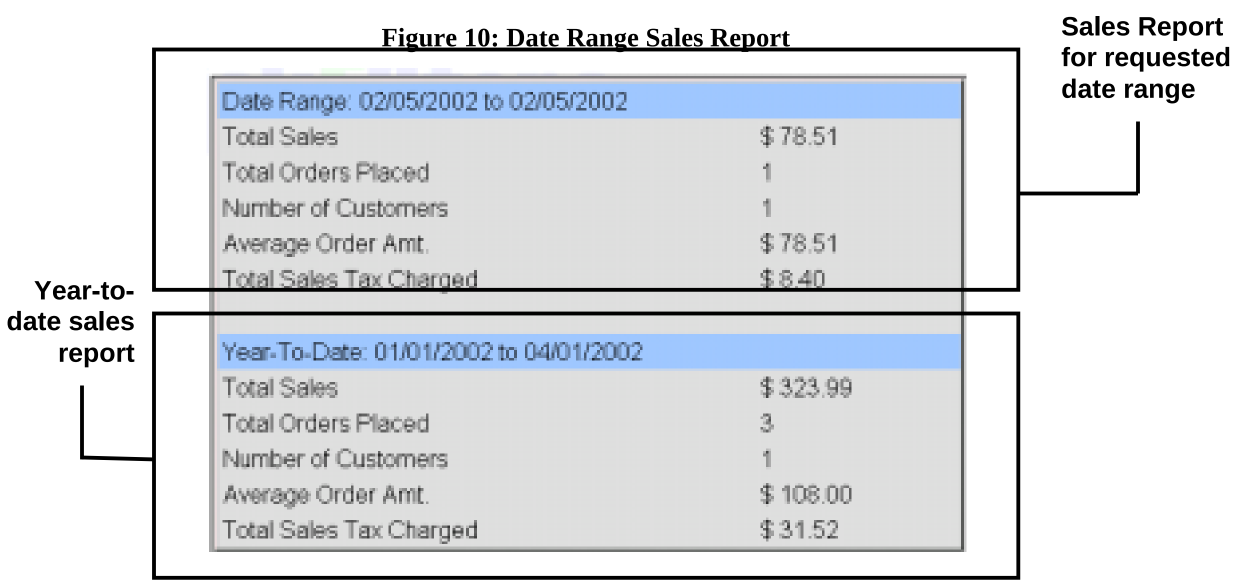
1. Click the **Reports** link on the menu.
   Three query tools appear in the main window. The center tool is Date Range.
2. In the **Date Range** box, enter the dates in the **From** and **To** fields.

Note: This report tool requires a valid **From** and to **Date** pair.

3. Click on the **Submit** button.
   The sales report for the date range you requested appears. See Figure 10: Date Range Sales Report, below.

Note: By default a year-to-date report is also generated.

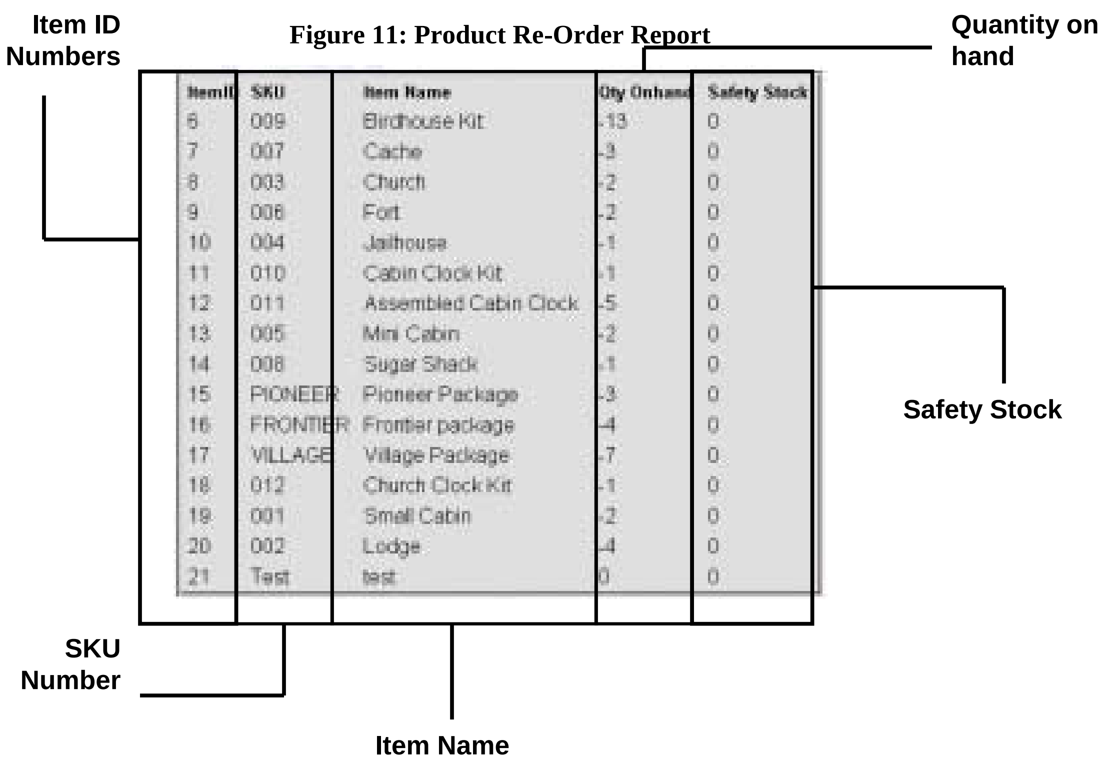
Figure 10: Date Range Sales Report



Product Re-Order Reports

1. Click the **Reports** link on the menu.
   Three query tools appear in the main window. The lower tool is the Product Re-Order Report.
2. In the **Product Re-Order Report** box, click on the **Show Re-Order Report** button.
   The Product Re-Order Report appears in the main window. See Figure 11, below. For a description of these fields see Table 1: Product Form on page 15.

Figure 11: Product Re-Order Report



ItemID	SKU	Item Name	Qty Onhand	Safety Stock
6	009	Birdhouse Kit	-13	0
7	007	Cache	-3	0
8	003	Church	-2	0
9	006	Fort	-2	0
10	004	Jailhouse	-1	0
11	010	Cabin Clock Kit	-1	0
12	011	Assembled Cabin Clock	-5	0
13	005	Mini Cabin	-2	0
14	008	Sugar Shack	-1	0
15	PIONEER	Pioneer Package	-3	0
16	FRONTIER	Frontier package	-4	0
17	VILLAGE	Village Package	-7	0
18	012	Church Clock Kit	-1	0
19	001	Small Cabin	-2	0
20	002	Lodge	-4	0
21	Test	test	0	0

PRODUCTS

The Products Link allows you to maintain your Product list. From this link you can add, edit and delete a product. From this link you can also copy a product which makes adding a new product easier, especially if several products have the same attributes.

Add A Product

1. Click the **Products** link on the menu.
   An Add Product tool appears in the main window.
2. Click on the **Add Product** button.
   The **Add Product** form appears. See Figure 12: , below.
3. Fill in the fields.
   For a description of these fields see Table 1: Product Form on page 15.

Note: Only Category, Product Name and Price are required. Although the weight field must contain a zero if weight is not being recorded.

4. Once the fields have been filled in, click the **Submit New Product** button.
   A message appears stating that the new product has been added. Click on the link below to add another product.

Figure 12: Add Product Form

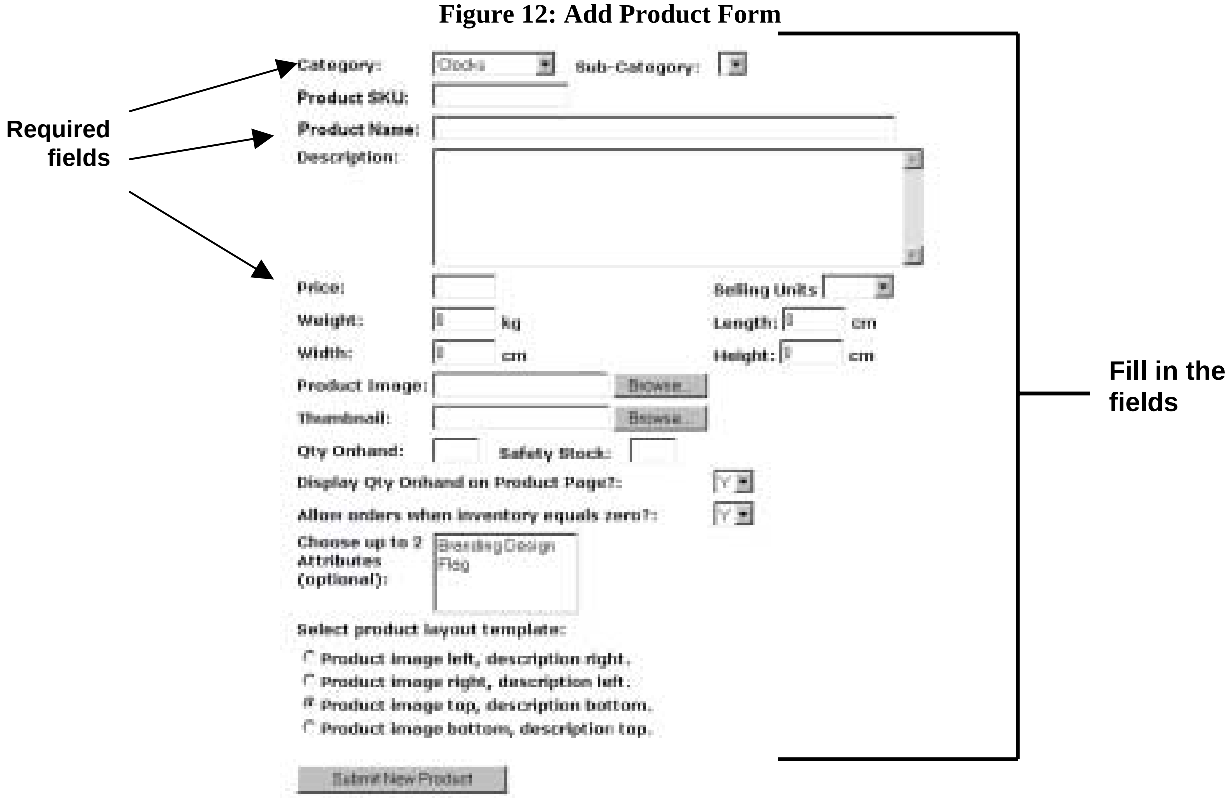


Table 1: Product Form, Field Descriptions

Field	Description
Category	Click on the drop-down menu to the right of the field to select a category. **Note**: It is required to fill in this field.
Sub-Category	Click on the drop-down menu to the right of the field to select a sub-category.
Product SKU	Stock-Keeping Unit, or Product Number
Product Name	Type in the name of your product. **Note**: It is required to fill in this field.
Description	Type in a description of the new product.
Price	Price is in U.S. Dollars and will accommodate two decimal places. **Note**: It is required to fill in this field.
Selling Units	Selling Units is just a label that some prefer to see next to the quantity field on the product detail page of the store. This label also appears on the order itself. To select a selling unit, click on the drop-down menu to the right of the field.
Weight	Weight is entered in ounces, however the store translates this into a total order weight in pounds if the weight threshold shipping is employed. Leave at zero is weight-threshold shipping is not being used.
Length	If applicable enter the length of the product in centimeters.
Width	If applicable enter the width of the product in centimeters.
Height	If applicable enter the height of the product in centimeters.
Product Image	Product image allows you to upload a graphic file of your product to your website. Click on the **Browse** button to locate the directory where the image file is stored. **Note**: Image files should be either gifs or jpegs.
Thumbnail	To have thumbnails displayed on your product page, you will need to name all of your thumbnail images

	the exact name as your full-size images <u>however</u> you need to add “th_” to the front. (i.e. product1.jpg becomes th_product1.jpg). **Note**: All products <u>must</u> have a thumbnail. If a product does not a thumbnail, the system automatically adds a clear image.
Qty Onhand	Enter quantity on hand if inventory will be used.
Safety Stock	This is the reorder point for the product. When on hand quantity is equal to or less than safety stock, this product will display the reorder report available from the Admin Console.
Display Qty Onhand on Product Page?	Self-explanatory. Select Yes or No.
Allow Orders when inventory equals zero?	When **Yes** is selected, the product will still be displayed, and orders can still be taken when on hand quantity is equal to or less than zero. When **No** is selected the product <u>will not</u> be displayed and the product will not be returned in product search results.
Choose up to 2 Attributes (optional):	This field in optional, however you can select two attribute types by holding down the **CTRL** key while clicking on each selection, or **click and drag** across both desired selections. **Note**: for any attributes to be listed, you need to add global attribute types and values to the database. For instructions on how to add attributes see the section on Adding Attributes on page 20.
Select product layout template	Choose a product layout template that describes the way you prefer this product’s image and description to be side-by-side or top-to-bottom.

Edit A Product

1. Click the **Products** link on the menu.
   An **Edit Product** tool appears in the main window.
2. Using the drop down box, select the product you want to edit.

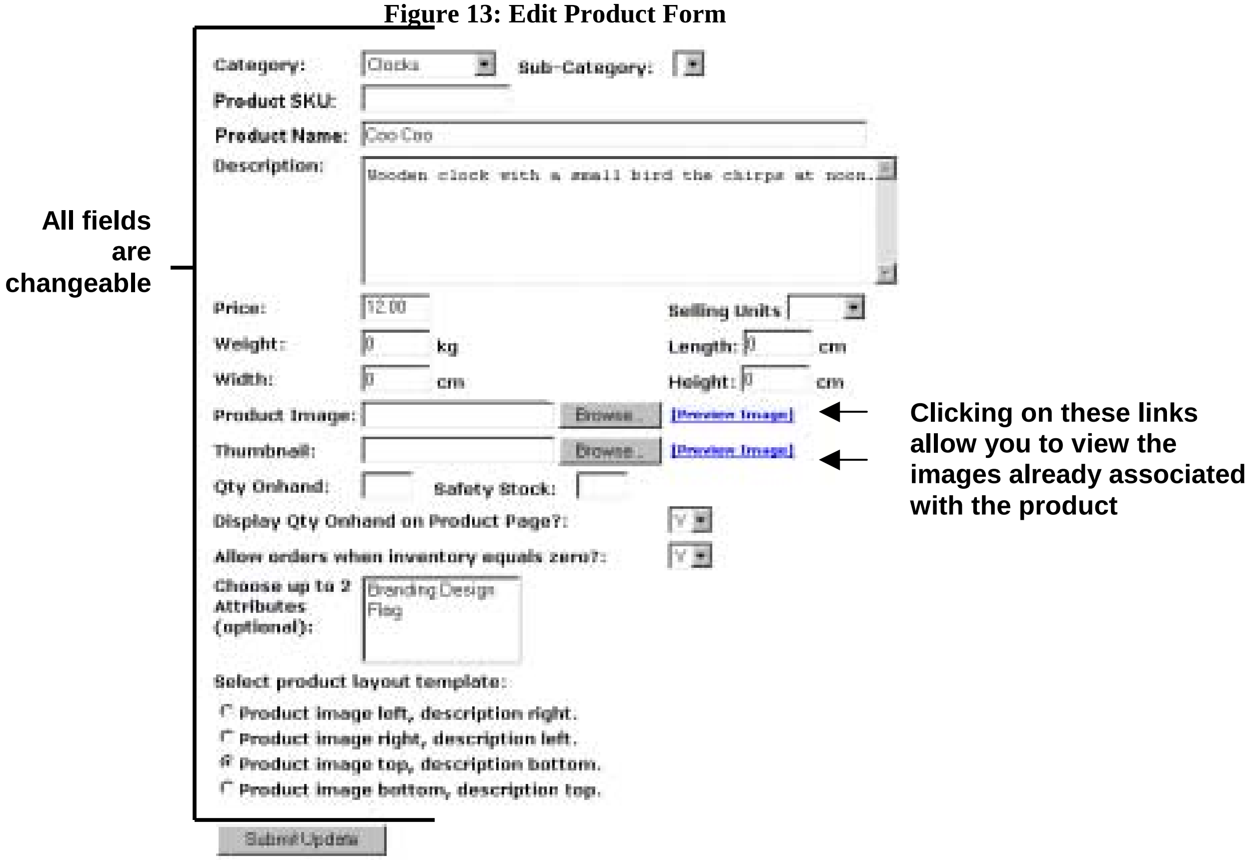
Note: The drop down box will only appear if you have more that one product defined.

3. Click on the **Edit Product** button.
   A Product form appears allowing you to make changes to the fields. For an example of this form see Figure 13, below.

Note: You can click on the **Preview Image** link to view the images already associated with the product.

4. Make the changes to the appropriate fields.
   For a description of these fields see Table 1: Product Form on page 15.
5. Once the changes have been made, click on the **Submit Update** button.
   A message appears stating that the product has been updated. Click on the link below to edit another product.

Figure 13: Edit Product Form



Copy A Product

1. Click the **Products** link on the menu.
   A **Copy Product** tool appears in the main window. See Figure 14, below.
2. Using the drop down box, select the product you want to copy.

Note: The drop down box will only appear if you have more that one product defined.

3. Click on the **Copy Product** button.
   The Copy Product form appears.
4. Enter the name of the new product into the **New Product Name field**.
5. If applicable, you can change the product category by clicking on the drop-down menu to the right of the field.
6. Click on the **Save New Product** button to continue.
   A message appears stated that your new product has been added.

Figure 14: Copy Product Form

Deleting A Product

1. Click the **Products** link on the menu.
   A **Delete Product** tool appears in the main window.
2. Using the drop down box, select the product you want to delete.

Note: The drop down box will only appear if you have more than one product defined.

3. Click on the **Delete Product** button.
   A message appears stating that the product has been deleted.

ATTRIBUTES

The Attributes Link allows you to maintain your Attributes list. From this link you can add, edit and delete attributes.

Adding Attributes

1. Click the **Attributes** link on the menu.
   An **Add Attribute** tool appears in the main window. See Figure 15, below.

Note: You must define a category before attempting to add products to the database.

2. In the Attribute Name field, type in the name of the attribute and then click on the **Submit** button.
   The system states the new Attribute name and asks you to set up the global attribute table. Simply put, you need to give the attribute various values.
3. Click on the **Setup** button provided.
   The **Setup Attribute Values** form appears.
4. In the field provide the first value for the new attribute. If there is more than one value to be entered, click on the **Continue with Attributes** button. Click on the **Finish** button when you are done.
   A message appears stating that you have successfully set up your new attribute table.

Note: Each value you add appears in the box below. See Figure 16, below.

Note: Attribute values are stored in the database as a comma-delimited list, so do not use commas when entering attribute values one at a time.

Figure 15: New Attribute Tool

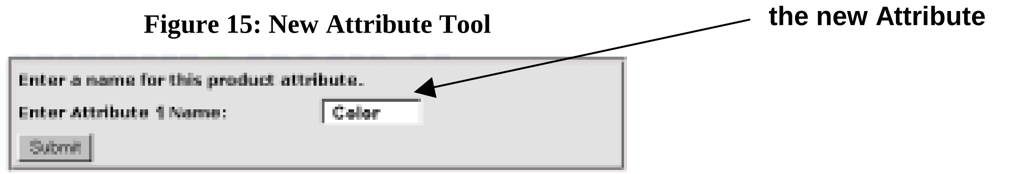
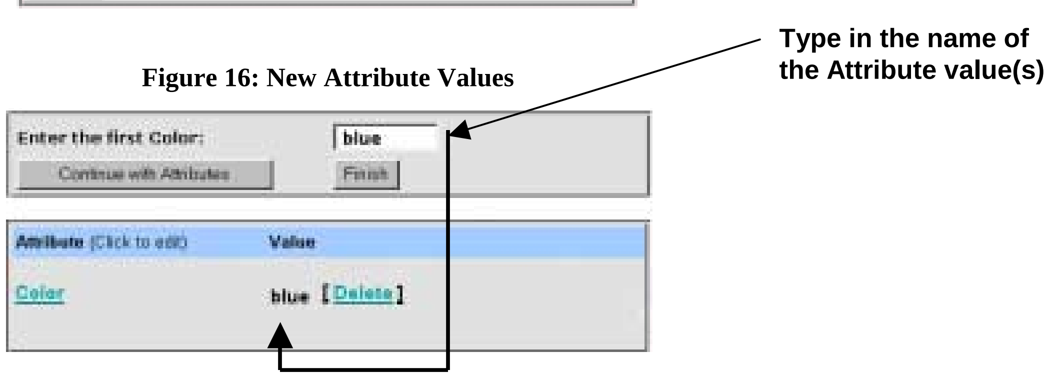


Figure 16: New Attribute Values



Editing Attributes

1. Click the **Attributes** link on the menu.
   A List of Attributes and their values appear in the main window.

2. Click on the name of the attribute you would like to make the changes to.
   The **Value** field is open allowing you to make any changes. See Figure 17, below.

Note: Only the Attribute you are making changes to has an **Update** button.

3. When you are done making your changes, click on the **Update** button.
   The Value field re-appears displaying the changes.

Figure 17: Changing Attribute Values

Deleting Attributes

1. Click the **Attributes** link on the menu.
   A List of Attributes and their values appear in the main window.

2. Click on the **Delete** link corresponding to the attribute you want removed.
   The attribute is removed from the list.

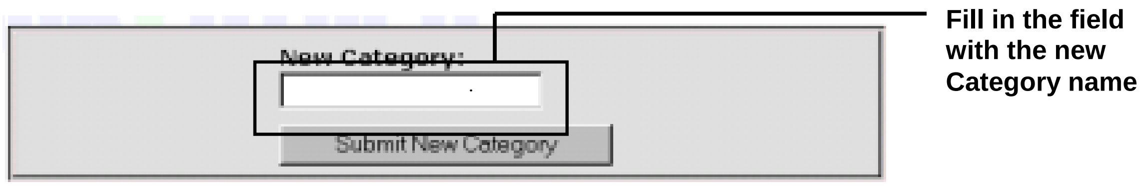
CATEGORIES

The Categories Link allows you to maintain your Categories list. From this link you can add and delete categories and sub-categories.

Add A Category

1. Click the **Categories** link on the menu.
   An **Add Category** button appears in the main widow.
2. Click on the **Add Category** button.
   The **New Category** tool appears. See Figure 18, below.
3. Fill in the field with the new Category name and then click on the **Submit New Category** button.
   A message appears stating that the Category has been added.

Figure 18: New Category Tool



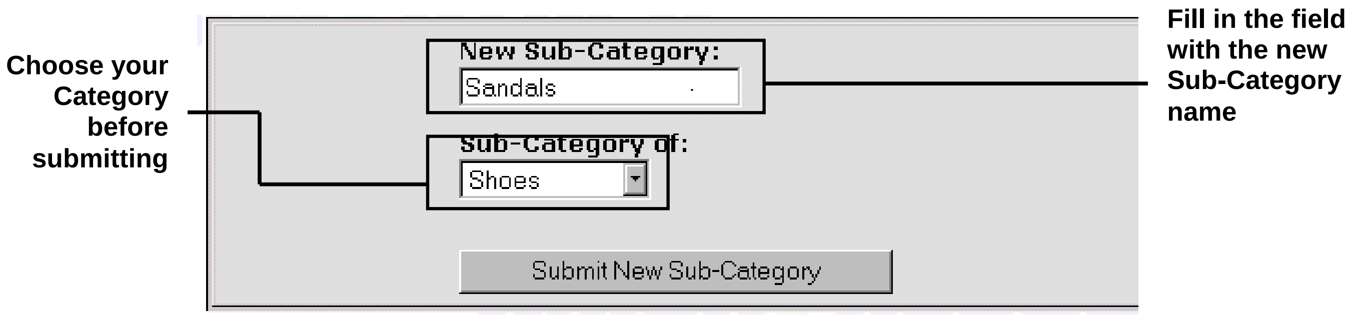
Add A Sub-Category

1. Click the **Categories** link on the menu.
   An **Add Sub-Category** button appears in the main widow.
2. Click on the **Add Sub-Category** button.
   The **New Sub-Category** tool appears. See Figure 19, below.
3. Click on the drop-down menu below to choose which Category you want to add the Sub-Category to.

Note: A drop-down menu will only appear if there is more than one Category setup.

4. Fill in the field with the new Sub-Category name and then click on the **Submit New Sub-Category** button.
   A message appears stating that the Sub-Category has been added.

Figure 19: New Sub-Category Tool



Deleting Categories

1. Click the **Categories** link on the menu.
   The **Categories** tool appears in the main window.
2. To select the category you want to delete click on the drop-down menu.
3. If you are deleting a Category click on the **Delete Category** button. If, however, you are only deleting a Sub-Category, click on the **Delete Sub-Category** button.

Note: Either button will not delete a Category or Sub-Category that contains even one product.

SALES TAX

The Sales Tax Link allows you add sales tax rates for States / Provinces which you may be required to charge. From this link you can also edit and delete Sales Taxes.

Adding Sales Tax

1. Click the **Sales Tax** link on the menu.
   The **Adding Sales Tax** tool appears in the main window. See Figure 20, below.
2. Using the drop-down menu, select a state or province. In the Tax field enter the appropriate tax rate using a whole number.
3. Click on the **Add Another State** button.
   The State / Province you added, along with it's sales tax rate , is listed in the Tax Table below. See Figure 21, below.

Figure 20: Adding Sales Tax Tool

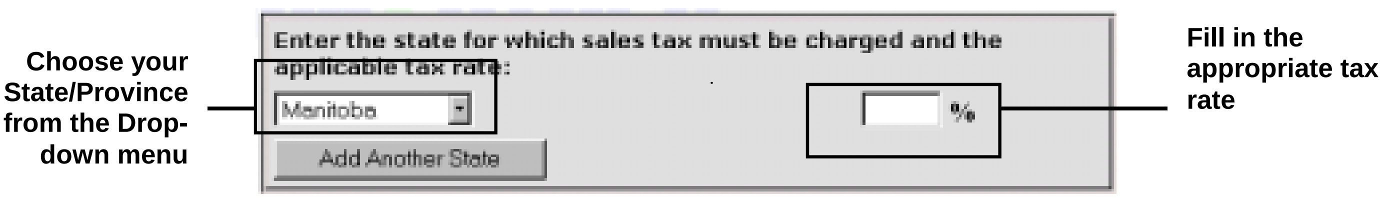
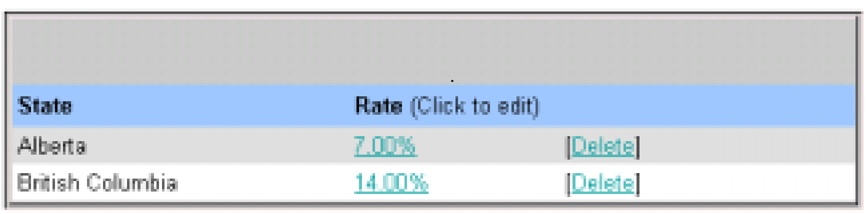


Figure 21: Tax Table



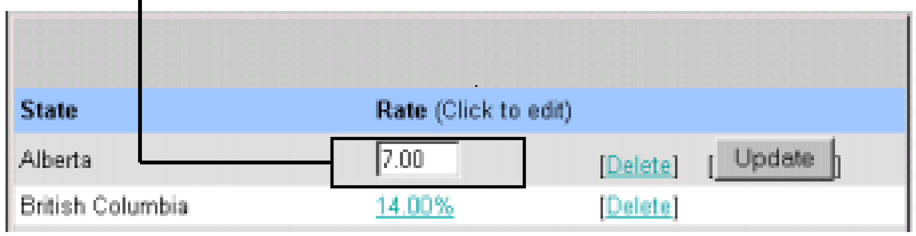
State	Rate (Click to edit)	
Alberta	7.00%	[Delete]
British Columbia	14.00%	[Delete]

Editing A Sales Tax

1. Click the **Sales Tax** link on the menu.
   The **Tax Table** appears in the main window.
2. Click on the rate you want make the changes to.
   The **Rate Field** opens allowing you to make the change. See Figure 22, below.
3. Once the change has been entered, click on the **Update** button.
   The Rate field re-appears displaying the change.

Make the appropriate changes to the field

Figure 22: Editing a Tax Table



Deleting A Sales Tax

1. Click the **Sales Tax** link on the menu.
   The **Tax Table** appears in the main window.
2. Click on the **Delete** link next to the Sales Tax you wan to remove.
   The system has removed the Sales Tax from the Tax Table.

SHIPPING

The behavior of the **Shipping** link depends on the shipping rate method that was chosen during the initial setup. Below are discussions on each of the Shipping Methods you can work with.

Shipping by Price or Weight

If you chose price or weight threshold shipping, you will see a form in the Admin Console main window that prompts you to enter the initial price or weight threshold and its corresponding shipping fee. See Figure 23, below.

This means that any order from $0.01 to the first threshold will be charged this amount. So, for example, if you enter 20 and 3.75, the all orders up to twenty dollars will be charged $3.75. The next, threshold entered (with its corresponding shipping fees) represents the amount added for shipping to orders from $20.01 to the limit entered, and so forth.

Each shipping limit and fees are reported on the Shipping Table below the Shipping form. See Figure 24, below.

Note: If you have chosen the weight threshold shipping method, the process is the exactly as described above, except that you will enter weight limits (in pounds) rather than price limits.

Figure 23: Shipping Form

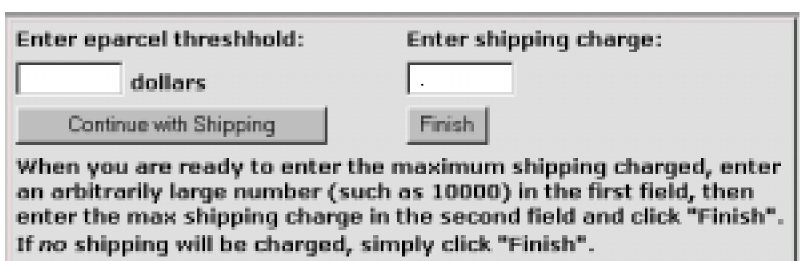
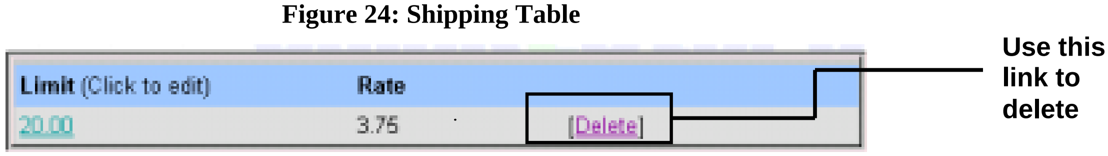


Figure 24: Shipping Table



Shipping by Option or Rate

If you chose the option / Rate table shipping method, you will see a similar , yet slightly different screen than above. Instead of entering price or weight limits, you will enter a description such as “UPS Second Day Air” or “FedEx Overnight”, along with the amount that you will charge for these services.

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