Rocket Cart

User Instructions V1.0

For Rocket Cart V1.0.3

Prepared by Steph Kendall, Avatar Ltd

Contents

1   Logging in

To login to the administration area of Rocket Cart, you will need an email address and password authenticated by Rocket Cart. Once you have these, you should:

- o Open your browser window (Internet Explorer or Mozilla)
- o Type in your Rocket Cart URL, for example,
  http://rocketcart.avatar.co.nz/admin/login
- o Enter your Email Address (e.g. steph@avatar.co.nz)
- o Enter your Password
- o Click on 'Login'

If you have any problems logging into your Rocket Cart administration area, please contact us on 03 365 2336.

2   Getting Started

When you have logged into Rocket Cart, you will see the introductory page for the Administration section and on the left hand navigation bar, the following sections.

- **Products**
- **Orders**
- **Reports**
- **Static Pages**
- **Settings**

Products

In the products section you can add / edit products and product categories and sub-categories. You can create 'featured products' (or specials) and add different sizes and colours for products should you need this facility.

- New Product
- Edit Product
- Product Categories
- Featured Products
- Product Options

Orders

In the orders section, you can check what orders you have received and once you have fulfilled orders, you can notify your customers that their order is on its way.

- Pending Orders
- Order History

Hint: You should visit the **Pending Orders** page as soon as you get home from the post office, to let your customers know you've shipped their order.

Reports

In the reports section, you can download reports for specific time periods, which show you specific data relating to your cart usage.

- Orders
- Products
- Customers

Static Pages

In the static pages section, you can create pages that give your customer more information about you. For example, you may wish to create pages about your company, your company history, your terms and conditions, your privacy policy, your site disclaimer, your copyright policy, your services and your products etc.

From 'edit pages', you can:

- o Add new pages

- o Edit existing pages

- o Delete pages

Settings

In the settings section, you can define shipping zones, change application settings (such as your email addresses), add your payment module, and create default or alternative currency details for payments*.

- o Shipping zones

- o Application settings

- o Payment gateways

- o Currencies

* Rocket Cart V1.0.2 displays prices and handles transactions in New Zealand dollars only.

3   Products

In the products administration area, you can add / edit products and product categories and sub-categories. You can create 'featured products' (or specials) and add different sizes and colours for products should you need this facility. You will see on the drop down menu, the following sections:

- o   New Product

- o   Edit Product

- o   Product Categories

- o   Featured Products

- o   Product Options

3.1   Before adding a new product

- Check to see if there is a suitable product category available for the new product, by viewing 'Product Categories'.

- If there is a suitable category, then proceed to 'Adding New Products' 3.3.

- If there is not a suitable category, proceed to Creating Product Categories 3.2 to create either a main category or sub-category.

3.2   Creating product categories

First decide whether your product category is a main category or a sub-category of an existing category. The follow the appropriate steps below:

3.2.1   Creating a new main category

- In box to the right of 'Add', enter the name of your product category.

- If your product is a main category, leave the second box as 'root' and click 'Go'.

3.2.2   Creating a new sub-category

- In box to the right of 'Add', enter the name of your product sub-category.

- Click on the arrow and view the drop down list. Click on the main category that your sub-category belongs to and click 'Go'.

3.3   Adding new products

To add new products click on 'New Product' underneath the Products tab on the left hand navigation. This will lead you to the *new product* details page, where you will see the following fields:

- o   Product Code:
- o   Name:
- o   Description:
- o   Price: (NZ)
- o   Discount:
- o   Weight:
- o   Available:
- o   Categories:
- o   Image:

Product Code:

- o   Enter the product code (this should be a unique number clearly identifying your product for you and your reports).

Name:

- o   Enter the product name.

The product name is very important as Rocket Cart will use it as your main page heading (your H1) and your page title. As both of these locations help search engines to index your page, *you may want to consider* giving your product name a 'keyword' rich slant and make it very specific.

For example, if you are offering a Lanolin night cream weighing 250g, rather than calling your product name simply 'Lanolin 250g', you could call your product "New Zealand Lanolin Night cream".

Hint: Make sure you are consistent with the way you type in your products. **Are you using lower case, or Title Case for example?**

Description:

- o   Enter a few sentences about your product that will really convince people to buy from you.
- o   Format your description text (see 6.3) to make this page look as attractive as possible.

Price:

- o   Enter the product price.

Discount:

- o   Enter any discounts on the product price.

Weight:

- o   Enter the product weight.

Available:

- o   If the product is currently available, make sure there is a tick in the box to the right.

If this is unchecked, the product will appear as currently unavailable, so remember to update this section of the site accordingly.

Categories:

- o   Select the appropriate category or sub-category for your new product.

Image:

- o   To add an image of your new product, click on the 'Browse' button to the right of the box.
- o   Click through to the location on your computer where your image file is stored.
- o   When you have found your image, click on the image and click 'Open'.
- o   This will automatically upload your image into Rocket Cart.
- o   Click 'Save' to save all of your changes.

Note: **If you miss filling in essential fields, such as produce code and product name, Rocket Cart will ask you to start filling in all of the details about your new product again.**

3.3.1 Product details page

You can also add 'Size' and/or 'Colour' options to your product details if applicable to the product.

- •   First, click on 'Edit Products' from under the Products section.
- •   Choose which product you wish to add size and/ or colour options to.
- •   Then click 'Edit' on the right of that product name.
- •   Select the option you wish to add or edit.

Changing and adding sizes

- To change the sizes that are displayed with your product, go down to 'Size'.

- The current options are shown in the dropdown box.

- Choose to 'Hide' or 'Show' the sizes available.

Changing and adding sizes

- To change the colours that are displayed with your product, go down to 'Colours and 'Add option'.

- The current options are listed.

- Choose to 'Hide' or 'Show' the colours available.

Your choices will be saved automatically.

- You can also choose to delete the options, by clicking on 'Delete'.

If you wish additional options to be added here (e.g. for height) please contact your System Administrator at Avatar.

3.4   Editing Products

- When you click on 'Edit Products', you will see a list of all the products in your shop.

- If you click on the product name, you will see the product page as displayed to shoppers. It includes the product name, description and price and offers options to shoppers such as quantity and 'add to cart'.

- If you want to edit any of these details, return to the product list and click on button on the right of the product name, 'Edit'.

- You will now see the *Product details page*
    - o   Product Code:
    - o   Name:
    - o   Description:
    - o   Price: (NZ)
    - o   Discount:
    - o   Weight:
    - o   Available:
    - o   Categories:
    - o   Image:

- Make your changes to the product details page as required and **hit 'Save' to save your updates**.

3.5   Creating Featured Products

Featured products appear on the home page of Rocket Cart. They appear in rotation depending on the weighting you assign them.

- To view your featured products, click on 'Featured Products' under the Products tab on the left hand navigation.

- To create a new featured product, click on 'New Featured Product'. You will see the following fields:

    o   Product Code:

    o   Product:

    o   Base Price:

    o   Discount:

    o   Description:

    o   Category:

    o   Weighting:

Product Code:

o   Enter the product code (this can be a unique number clearly identifying your product as a featured product for you and your reports).

Product:

o   Enter the product name.

Base Price:

o   Enter the price of your product. If you leave this at $0.00, the product will be featured with its original price of the product. If you wish to make this a 'specials' price, enter the new price here.

Discount:

o   Enter the amount of discount offered, if applicable.

Description:

o   Enter a few sentences about your product that will really convince people to buy your featured product.

o   Format your description text (see 6.3) to make this page look as attractive as possible.

Category:

o   Select the appropriate category for your featured product.

Weighting:

o   Give your featured product a weighting. A product with a weighting of 5 will turn up, on average, five times as often as a product with a weighting of 1 (the default).

4   Order Administration Area

In the orders section, you can check what orders you have received and once you have fulfilled orders, you can notify your customers that their order is on its way.

- o   Pending Orders
- o   Order History

Hint: You should visit the **Pending Orders** page as soon as you get home from the post office, to let your customers know you've shipped their order.

4.1   Viewing pending orders

- To view your pending orders, click on 'Orders' on the left hand navigation bar and select 'Pending Orders' from the drop down list.
- This page will let you know which orders are waiting to be shipped.
- If you have shipped orders, you need to update this page accordingly.

4.2   Viewing order history

- To view your order history, click on 'Orders' on the left hand navigation bar and select 'Order History' from the drop down list.

You will view details for all the orders found including:

- o   Order number
- o   Date and time the order was placed
- o   Customer name
- o   Total sale
- o   Status of order

You can change and update the status of each individual order and manage your orders according to your shopping policy. You can choose to mark each one as either:

- o   Complete
- o   Awaiting shipping
- o   In progress
- o   Failed

4.2.1   Changing the status of an order

- Select the order you want to change the status for by clicking in the tick box on the left hand side of the order details.
- From the drop down list, select the status you want to assign to the order.
- Click on 'Save' to save your update.

5   Reports Administration Area

In the reports section, you can download reports for specific time periods, which show you specific data relating to your shopping.

- o   Orders
- o   Products
- o   Customers

5.1   Viewing orders information

- To view information about your orders for a specific period, click on 'Orders'.
- Select the time frame you wish to review using the drop downs.
- Click on 'download'.

You will now be offered the choice of saving or opening the report (which is generated as an Excel spreadsheet).

The report will show you:

- o   Dates to which the data relates
- o   Order ID number
- o   Date of order
- o   User (customer) name
- o   Country from where the order has come from
- o   Items ordered
- o   Total value of order

5.2   Viewing product sales

- To view information about your product sales, click on 'Products'.
- Select the time frame you wish to review using the drop downs.
- Select which product category you wish to review.
- If you wish to select multiple product categories, hold down the CONTROL key.

You will now be offered the choice of saving or opening the report (which is generated as an Excel spreadsheet).

The report will show you:

- o   Dates to which the data relates
- o   Categories to which the data relates
- o   Order ID number

- o Product code

- o Number of units sold

- o Price

- o Total sales

5.3   Viewing customer information

- To view information about your customers, click on 'Customers'.

- Click on 'Download'.

You will now be offered the choice of saving or opening the report (which is generated as an Excel spreadsheet).

The report will show you:

- o Dates to which the data relates

- o Customer ID

- o Customer's first name

- o Customer's last name

- o Customer's email address

- o Number of orders placed

- o Total value of their orders placed

- o Average value of their orders

Hint: This information is invaluable when you are creating a mailing list. You can view our more information about email marketing using Rocket Mailing at:
http://www.rocketmailing.com/

It is highly advisable to state on your Web site (on a privacy policy for example) whether or not you will using people's email addresses for promotional mailings. Non-permission based emailing may be regarded as spam.

6   Static Pages

Static pages can be used to give your customer more information about your company, your history, your terms and conditions, privacy policy, site disclaimer, services and products etc.

If you are using Rocket Cart as a plug-in to an existing Web site, you may not need to create many static pages to help promote your Web site. However, if you are using Rocket Cart as your 'whole' Web site, creating static pages can be extremely beneficial in helping to establish coverage with search engines for your Web site. Search engines like content rich pages so it's a good idea to spend some time creating static pages that have interesting and useful content on them.

Hint: **Do not forget to fill in the optimisation tags provided – they are extremely important to search engines.**

- To create a static page, click on 'Static Pages' on the left hand navigation bar.
- From the drop down choices, click on 'Edit Pages'.
- The first page you will see shows all the static pages you have created in Rocket Cart.
    - Name
    - Path
    - Edit

6.1   Deleting static pages

You can select pages using the tick boxes to the left of the page name and delete them if required, using 'Delete' at the bottom of the page.

6.2   Adding new static pages

- Click on 'New Page' (at the bottom of the page).
- You are now on the 'edit static page' and you will see the following fields:

    Name:

    Path:

    (e.g. `/about/new-page`)

    Body:

    'Save Changes'

    Page Title:

    Meta Keywords:

    Meta Description:

    'Save Changes'

By following the instructions below for each field, you will be able to create a new static page for Rocket Cart:

Name:

- o   In the box to the right of 'Name', enter the page name.

- o   For example, for a page about your copyright policy, your page name may simply be "Copyright".

Path:

- o   In the box to the right of 'Path, enter the path or folder names, where you are going to locate the page.

- o   This needs to be entered in this particular format `"/about/new-page"`. The folder name is preceded by a slash; the page name where it is made up of multiple words is separated by hyphens.

Body:

- o   In the box to the right of 'Body, enter the page text. Refer to **Formatting Page Text** 6.3 for advice on how to format your page text.

- o   When you have finished writing and formatting your text, 'Save Changes'.

- o   **You need to click on 'Save Changes' to keep the changes you have made to your page.**

Page Title:

- o   In the box to the right of 'Page Title', enter the page title.

- o   The page title is viewed at the top of a browser window. In terms of search engine optimisation collateral the page title is a very important location.

- o   Typically, a "keyword phrase" is located in the page title. For example, if your page text relates to "sheepskin slippers", your page title may be "New Zealand Sheepskin Slippers" or another appropriate keyword phrase.

Meta Keywords:

- o   In the box to the right of 'Meta Keywords', enter keywords that describe your Web site.

- o   We suggest formatting this list as follows: with geographic regions first (e.g. new zealand, nz, auckland, ellerslie) in lower case, with commas separating each word. Include pluralisations and misspellings.

- o   You can use the same Meta keywords on each page, so save a copy of what you type for one to use again.

Meta Description:

- o   In the box to the right of 'Meta Description, enter the page description.

- o   The page description may be displayed on search engine results pages (SERPS) and is used by search engines and directories to help them index sites. In terms of search engine optimisation collateral the page description is another very important location. Typically, one or two "keyword phrases" are located in the page description.

- o   For example, if your page text relates to "sheepskin slippers", your page description may include the keyword phrase "New Zealand sheepskin slippers", "nz slippers in sheepskin" or another appropriate keyword phrase.

- **Click on 'Save Changes' to save your work.**

- *Note:* Your saved page is live instantly.

- Use back button in the browser to go back to the static pages section.

- Double check the live page, by clicking on the <u>path name</u>.

- Use the back button (usually a big green arrow) in the browser to go back to the admin section.

6.3   Formatting page text

6.3.1   Creating headings

The largest heading on the page is called the H1. – Heading 1

To create a H1, write "h1." before the heading text followed by 1 space and a hard return.

H1. displays as the **Largest Heading on the Page**

The second largest heading on the page is called the H2. – Heading 2

To create a H2, write "h2." before the heading text followed by 1 space and a hard return.

H2. displays as the **2nd Largest Heading on the Page**

The third largest heading on the page is called the H3. – Heading 3

To create a H3, write "h3." before the heading text followed by 1 space and a hard return.

H3. displays as the **3rd Largest Heading on the Page**

After you have formatted the text required as a heading, make two hard returns (press 'Enter' on your keyboard twice) to continue to the next heading size or normal text size.

6.3.2 Creating bold text

Put an asterix at the beginning and end of the text you wish to make bold

Put an asterix at the beginning and end of the text you wish to make bold

6.3.3 Creating italic text

Put an underscore at the beginning and end of the text you wish to make italic

Put an underscore at the beginning and end of the text you wish to make italic

6.3.4 Creating lists

You can create two different types of lists. One with bullet points and with numbering.

To create a **bullet pointed list**, follow the steps below:

* add an asterix to the line of text requiring a bullet point

This displays as,

- add an asterix to the line of text requiring a bullet point

** add two asterixes to the line of text requiring a bullet point at a deeper level

- add a second asterix to the line of text requiring a deeper level

*** add three asterixes to the line of text requiring a bullet point at an even deeper level

- add three asterixes to the line of text requiring a bullet point at an even deeper level

Use a hard return (press 'Enter' on your keyboard) to make the end of a list.

To create a **numbered list**, follow the steps below:

add an hash (#) to the line of text requiring a number

add an hash (#) to the line of text requiring a number

This displays as,

1. add an hash (#) to the line of text requiring a number
2. add an hash (#) to the line of text requiring a number

add two hashes to the line of text requiring a number at a deeper level

1. add two hashes to the line of text requiring a number at a deeper level

add three hashes to the line of text requiring a number at an even deeper level

       1. add three hashes to the line of text requiring a number at an even deeper level

6.3.5 Creating paragraph breaks

To create a paragraph break, use a **hard return** in your text, (i.e. press 'Enter' on your keyboard much as you would do using Word).

6.3.6 Creating links

To create links between pages, you need to use specific linking text, as follows:

       "Name of page":/category-in-which-page-belongs/name-of-page/

- Note that the 'name of page' is encased by inverted commas at either end, "
- 'Name of page' is followed by a colon :
- The path (or the URL locating the page) is prefixed by a forward slash, / and finishes with a forward slash, /.
- The folder name and path name are separated by hyphens, -

In the example below, we are creating linking text on the 'About Us' page to a privacy policy (also) located in the 'about' folder:

- Go to static Pages, Edit Pages and select page, 'About Us' to edit:
- In the 'Body' field, you need to add code to link to the privacy policy. The link text looks like,

       "Privacy Policy":/about/privacy-policy/

- This displays on the Web page as:

      Privacy Policy

Note: Privacy Policy equals the anchor link text (or the text you see on the page, which forms the link

. */about/privacy-policy/* is the folder and page name (i.e. the directory path).

You can also add brackets to your linking text, which looks like this:

       ("Privacy Policy":/about/privacy-policy/)
       displays as

(<u>Privacy Policy</u>)

Hint: It is also common practise to separate a number of links sitting side by side by an upright bar, | (this is next to the + sign on your keyboard, top row far right).

> **"Privacy Policy":/about/privacy-policy/ | "Copyright":/about/copyright/ | "Disclaimer":/about/disclaimer/**

displays as

<u>Privacy Policy</u> | <u>Copyright</u> | <u>Disclaimer</u>

6.3.7 Advanced Formatting

More instructions on using Wiki style formatting to style the text on your static pages can be viewed on the following Web page:

<u>http://en.wikipedia.org/wiki/Wikipedia:How_to_edit_a_page#Links_and_URLs</u>

6.4   Creating links to new static pages

There are two ways to create links to new static pages. The first involves creating additional buttons to the navigation bar, which currently has to be done by an Avatar Web programmer / designer. Please talk to us about your required update and we will let you know what the time and cost estimate will be prior to us starting.

The second way to create links to new static pages is to add links to new pages from an existing static page. We have outlined the process below for this method of introducing new static pages.

6.4.1 Creating sub-navigation (links to other pages)

What we are doing is creating a sub-navigation menu on each page. These pages can only be reached from the page to which it belongs and the other pages on the sub-navigation. Ideally, there would be several points of access to each page on the Web site, so we suggest that you update your site map and eventually update your home page links too.

In this example, we are introducing three new links to an existing About Us page. The new pages are a Privacy Policy, Disclaimer and Copyright).

- Go to static Pages, Edit Pages and select page, 'About Us' to edit:
- In the 'Body' field, you need to add code to link to the other pages, i.e.

  "Privacy Policy":/about/privacy-policy/ | "Copyright":/about/copyright/ | "Disclaimer":/about/disclaimer/

This displays on the Web page as:

<u>Privacy Policy</u> | <u>Copyright</u> | <u>Disclaimer</u>

- **Now go to each of the pages and ensure they link to each other, (i.e. at the top of each page) and paste the appropriate code.**

On the **Privacy policy page**, you might paste the following text:

"Copyright":/about/copyright/ | "Disclaimer":/about/disclaimer/

This displays on the Web page as:

Copyright | Disclaimer

On the **Copyright page**, you might paste the following text:

"Privacy Policy":/about/privacy-policy/ | "Disclaimer":/about/disclaimer/

This displays on the Web page as:

Privacy Policy | Disclaimer

On the **Disclaimer page**, you might paste the following text:

"Privacy Policy":/about/privacy-policy/ | "Copyright":/about/copyright/

This displays on the Web page as:

Privacy Policy | Copyright

When your site visitor sees the 'About Us' page, he/ she can then navigate to each of these pages in turn.

7   Settings

In the settings section, you define shipping zones, change application settings (such as your email addresses), add your payment module and create default or alternative currency details for payments*.

- o   Shipping zones

- o   Application settings

- o   Payment gateways

- o   Currencies

* Please note: Rocket Cart V1.0.2 displays prices and handles transactions in New Zealand dollars only.

7.1   Creating a new shipping zone

- First click on 'Shipping Zones' under the 'Settings' tab on the left hand navigation.

- The first page you will see lists all the shipping zones that you have created/ or not created.

- To create a new shipping zone, enter a name for the zone in the box provided and click on 'Create'.

- You can select the countries in your shipping zone by depressing the CONTROL key and clicking on each country.

- By clicking on the < arrow, you will add these countries to your shipping zone list.

- To remove countries from your shipping zone, depress the CONTROL key and select each country from the list on the left.

- By clicking on the > arrow, you will remove these countries from your shipping zone list.

You can determine the following shipping costs:

- o   Per item

- o   Per kg

- o   Flat rate

You can create as many different shipping zones as you require.

You can also create one default shipping zone if preferred.

7.2   Creating new application settings

- First click on 'Application Settings' under the 'Settings' tab on the left hand navigation.

In the first section, you can direct your emails to go to different addresses. (Normally, you will not need to change anything in this section).

- Enter revised email addresses as required.

- Click 'Save' to save your changes.

Emails managed here include the emails arriving from customers in regard to the following

  o Shipping:

  o Default:

  o Contact:

In this section, you will also see the URL and name of your application. This should not be changed unless advised by the system administrator.

7.3   Setting up payment gateways

- First click on 'Payment Gateways' under the 'Settings' tab on the left hand navigation.

- You will be asked to select a payment module.

- When you have selected a payment module, click 'Save' to save your changes.

Note: **Before activating a payment module, you must make sure it has been configured properly (your Web site administrator will be able to help you with this).**

7.4   Currencies

- To add, delete or create a default currency, you must first click on 'Currencies' under the 'Settings' tab on the left hand navigation.

7.4.1 Adding a new currency

To add a new currency, enter information in the following boxes provided:

  o Abbr

  o Name

  o Symbol

  o Rate

- Click on 'Add'.

- The currency rate will be automatically updated.

7.4.2 Deleting an existing currency

- To delete an existing currency, click in the box to the left of the Abbreviated name of the currency you want to delete.

- Click on 'Delete'.

7.4.3 Creating a default currency

- To choose your default currency, click in the box to the left of the Abbreviated name of the currency you want to use as your default currency.

- Click on 'Default'.