ProStores
Store Administration

Complete Reference
Version 8.1

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Chapter 1: Overview

ProStores removes the barriers of entry into electronic commerce. You can quickly design your catalog and purchase pages exactly the way you like. With an intuitive easy-to-use interface, extensive back office functionality and sophisticated inventory management, ProStores gives you the tools you need to extend your business into the world of e-business quickly and easily.

Detailed tracking and reporting give you the information you need to maximize profits. Exports to QuickBooks and other applications let you integrate ProStores with your current business tools. In addition, you won't have to change how you do business to use ProStores. Customizable security lets you distribute store management among multiple people. Support for different inventory models and variable purchase limits support your current business practices.

Using This Guide

This user guide is organized by business processes (for example, store setup, order processing, supply chain management, etc.). In addition, it includes full procedural and reference information for all application functions.

This guide contains information for *all* ProStores editions and modules. If a feature is only available to certain editions or modules, it will be noted in the text.

Optimal Hardware/Software Settings

ProStores Store Administration recommends the following browser and hardware settings:

	Required	Optimal
Browsers	Browser versions that support HTML 4.0 and Cascading Style Sheets Level II (such as Microsoft Internet Explorer 4.0, Netscape versions 6.2, FireFox 1.5, or any higher version of these browsers).	Browser versions that support HTML 4.0 and Cascading Style Sheets Level II (such as Microsoft Internet Explorer 5.5, Netscape versions 6.2, FireFox 1.5, or any higher version of these browsers).
Monitor Resolution	800x600	Highest resolution with which you are comfortable.
Monitor Colors	n/a	65,536 or Higher
JavaScript	Enabled	Enabled. ProStores Store Design requires JavaScript for creating collapsible forms, collapsible navigation, field help, wizards, and much of the ProStores Store

	Required	Optimal
		Design functionality.
Browser Cookies	Enabled	Enabled

Getting Started

This section describes tasks to help you get started using Store Administration.

Logging On

In order to access Store Administration, you must log in using a valid user name and password. If you try to access a manager to which you do not have access, you will be prompted to enter a valid user name and password for that manager.

If you leave your computer for an extended period, it is recommended that you log off by clicking **Logoff** (on the toolbar).

Troubleshooting Log Ons

If you're having trouble logging in, check the following:

- Are you using the proper case for your user name and password? User name and passwords are case-sensitive.
- Verify that your PC's clock and time zone are correct. Your user name and password "lasts" for 8 hours, so an incorrect clock and/or time zone setting can cause an error even though the user name and password are correct.
- Check your browser settings to ensure that "cookies" are enabled.

The Welcome Page

The Getting Started Checklist page is the first page that appears when you log on to your store for the first time. It lists common tasks that are required, recommended, and optional in an order of recommended completion, and links to download the printable Quick Start and Store Administration User's Guide.

To prevent this page from showing again, select the check box at the bottom of the page.

To view this page again, click the **Getting Started** link under the Home link in the ProStores Explorer.

Viewing Store Activity

The Store Administration Home page provides a quick summary of your store activity and access to pertinent reports. Click the links to view more detailed information. For example, click the **Pending Orders** link to display the list of pending orders.

While some of this information is updated immediately, other information may be updated on a schedule determined by your Site Administrator. Please see your Site Administrator for more information.

To view this page, click the **Home** link in the ProStores Explorer. To make this your default Home page, select the **Do not show this page again** check box at the bottom of the Getting Started Checklist page. See *The Welcome Page* (page 7) for more information.

To customize which items appear on this page, click the **Configure Home Page** link in the Quick Help panel. The Store Administration Home Configuration page opens. Select the check box for each item you wish to appear on your Store Administration Home page, and then click the **Submit** button.

These settings will only affect the logged in user.

The Store Administration Home page displays the following information, grouped into related sections:

Order Information

Field	Description
Pending Orders	The number and dollar value of current pending orders. To indicate if you want this page to default to either the Credit or Other pending orders, select the appropriate option in the Store Administration Home Configuration page.
Orders ready for shipping	The number and dollar value of orders ready for shipping.
Orders going out today	The number and dollar value of orders shipped today.

Customer Information

Field	Description
New customer orders	The number of customer orders since midnight.
Customers	The number of customer profiles in the store.
Best Customer	The customer with the greatest order total.

Product Information

Field	Description
Low inventory products	*(Advanced Edition only)* The number of products that are considered low on inventory.
Backordered products	*(Advanced Edition only)* The number of products on backorder.
Best selling product	The product with the greatest number of orders.

Field	Description
Featured products	The current featured products. Each store can have up to five featured products.
Featured Categories	The current featured categories. Each store can have up to five featured categories.

Today's Reports

Field	Description
Cart and visitor counts	Provides a link to the **Order Visit Ratios** report.
Search Statistics	Provides a link to the **Search Summary** report.

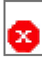
Getting Help

ProStores Store Administration offers easy access to help.

- The **Online Guide** button on the toolbar opens a full user guide with information on all the features of Store Administration. In addition, you can download printable user guides from the Online Guide Welcome page.
- Clicking  on a form will bring up a window with help on entering information in the form fields.
- Some pages display help directly on the page in the Help Panel (on the right side of the page).

Error Logging

On some occasions, ProStores will log errors, warnings or other events related to the application's activity. If such an event occurs, one or more of the following images will appear in the ProStores Explorer (above the navigation):

Image	Description
	General information
	Application warning
	Application error

To view the event log, click the appropriate image. The log file will appear, with the log message. To return to Store Administration, click the **Return to Store Administration** link.

You can also view the log by browsing to **Store | Store Log**.

Language Override

This option is only available if it has been enabled by your Site Administrator

If your Site Administrator has installed multiple translations of ProStores, you can choose the language in which you wish to work. To do so:

1 Click **Language Preferences** on the toolbar. The Override Browser Language Settings page appears.

2 Select the language in which you wish to work and click **Submit**. Store Administration now appears in the selected language.

Accessing Your Store

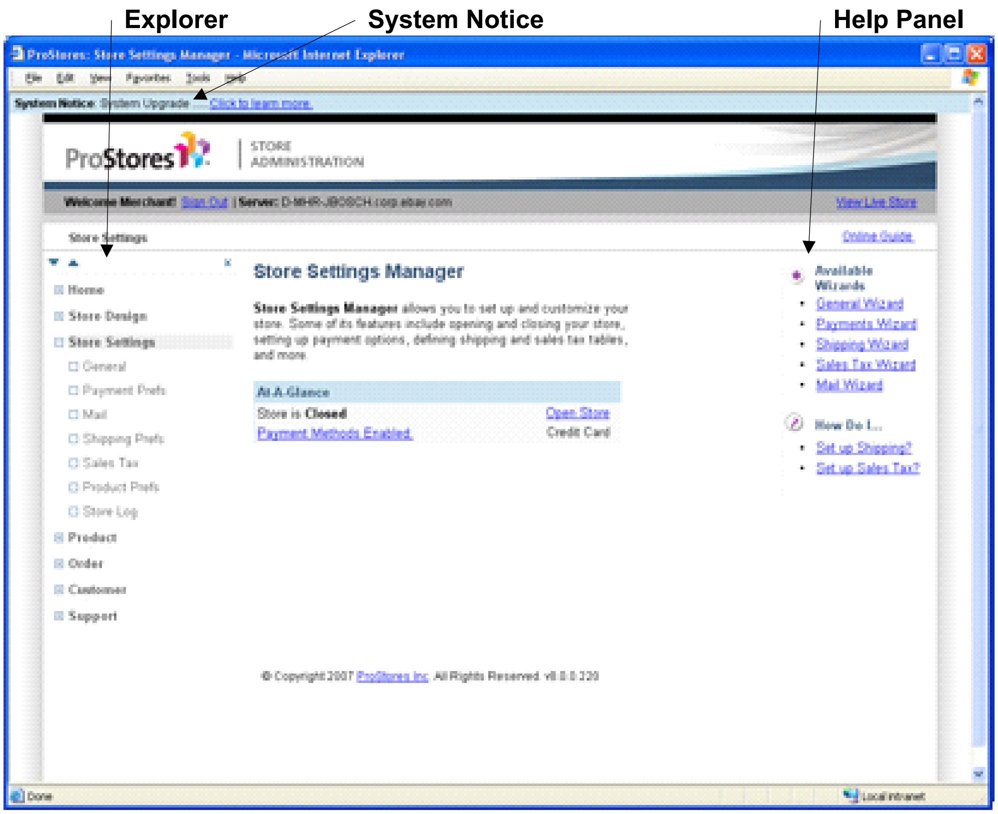
To view your storefront, click the “View Store” button on the Store Administration toolbar.

Working in Store Administration

The Store Administration workspace contains the following areas:

- The **ProStores Explorer**, which allows you to browse to the different parts of the application.
- The **Toolbar**, which provides access to your store and the Online Guide.
- The **Help Panel**, which contains access to the wizards available in the application, and/or help on using the current page.

Your Site Administrator may send you messages notifying you of updates, etc. These messages will appear at the top of the screen, and will start with “System Notice:”. To view the message, click the link.



The Store Administration Workspace

Navigating Store Administration

The ProStores Explorer uses "collapsible" navigation that allows you to quickly access the different parts of the application. The navigation works as follows:

- Click ⊞ to expand a list.
- Click ⊟ to hide a list.
- ⊡ indicates that an item cannot be expanded or collapsed.
- Click the name of the manager to go that page, and expand the list for that manager.

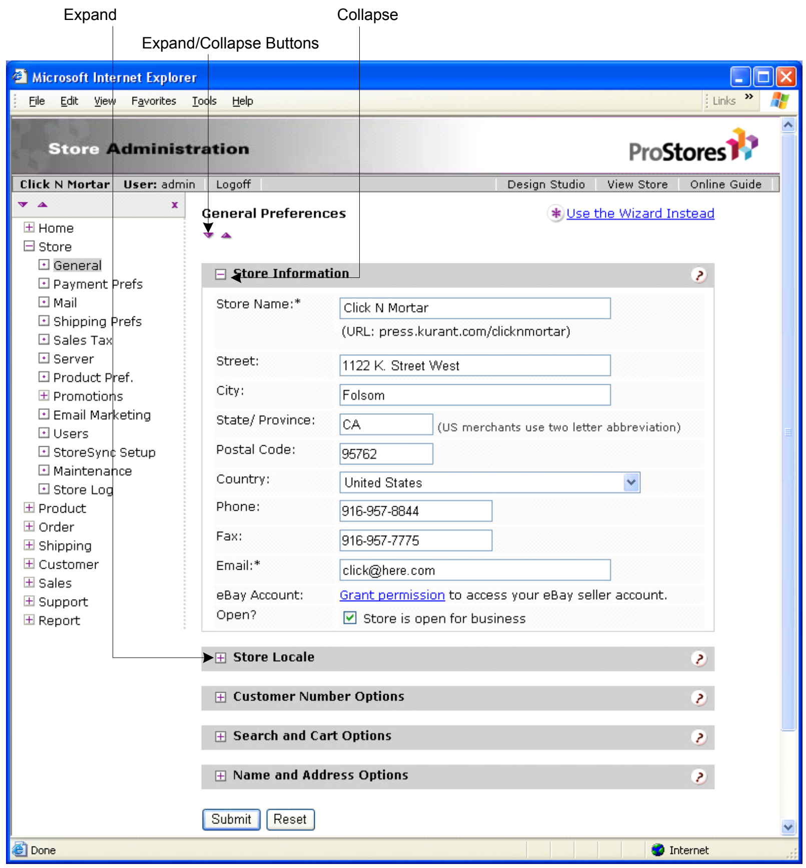
The Explorer toolbar contains several buttons that also affect the list.

- ▲ collapses the entire list.
- ▼ expands the entire list.
- ☒ hides the entire Explorer. To show the Explorer again, click ▤ on the ProStores toolbar.

Some of the forms in Store Administration can be expanded and collapsed. This allows you to quickly work with the most important fields on the form, without having to scroll through a long page.

- ▲ collapses all sections of the form.

- ▼ expands all sections of the form.
- ⊞ expands a form section.
- ⊟ hides a form section.



Collapsible Forms

Advanced/Basic Modes

ProStores provides you with two different “modes”: an **Advanced** mode which includes all application functionality, and a **Basic** mode that provides access to only the most important functionality.

You can choose between these modes, depending on how you want to use ProStores. To change modes, go to the Store Manager landing page and click the **Advanced/Basic Mode** link to switch modes.

If you are working in basic mode, you can access the advanced mode functions in the ProStores Explorer by clicking .

These settings will only affect the logged in user.

The Managers

Each “manager” in Store Administration focuses on a specific area of maintaining your store, and can be accessed by clicking the appropriate link on the ProStores Explorer.

In addition, some managers offer wizards to help you with common tasks. These wizards appear on the main landing pages in the Help Panel.

The managers are as follows:

Manager	Description	Wizards
Store Manager	Preferences and settings that set up and customize your store.	General Preferences, Payment Preferences, Mail, Shipping, Sales Tax
Product Manager	Product line management.	Add Product
Order Manager	Orders, both pending and completed.	Issue Credits
Shipping Manager	Orders that are ready to be shipped.	n/a
Customer Manager	Customer profile information.	n/a
Sales Manager	Sales leads, sales people, sales managers, and sales reports.	n/a *(Advanced Edition, Sales Manager module only)*
Support Manager	Template design, import/export, image upload and server file management.	Upload Images
Report Manager	Summary level and detailed reports that can be customized and used to analyze the success of your store.	n/a

Additional Documents

In addition to this user guide, please refer to the following documents for more information:

- The Online Guide available in the ProStores application.
- Designer’s Reference: this may be downloaded from the Online Guide start page.
- SSML Object Reference: this may be downloaded from the Online Guide start page.
- If you have recently upgraded, refer to one of our Upgrade Guides: these may be downloaded from the Online Guide start page.

Chapter 2: Designing Your Store

The design of your store is one of the most important pieces to ensuring a positive shopping experience for your customers. Credibility, ease of use, and overall impressions are largely driven by store design.

This chapter provides basic information for you or your designer to use in designing your ProStores store. For more detailed and advanced information, please download the *Designer's Reference* from the Articles and Other Important Information page in the Store Design Help.

Store Design

The Store Design hub allow you to create or modify the design of new ProStores Web store.

A few notes about the Store Design hub:

- Accessing the Store Design hub from the Getting Started Checklist helps with first time set up of your initial store version. If you have designed more than one store version (in Store Design Store Versions page), you will first need to choose the store version you wish to work with in Store Design by selecting it from the **Store Version** pull-down menu. From the Store Design hub you can select predefined themes and page layouts. Or you can use one of the Store Design editors for customizing page templates:
    - **Basic Editor** for simple customization;
    - **Advanced Editor** for more sophisticated editing functions including adding SSML tags, and;
    - **Source Editor** for directly editing the page template source code.
- Selecting a new theme will overwrite any edits you have already made to your header and footer templates for the selected store version. To change the theme without affecting the edited header and footer, first copy the store version, then select the theme in the copied version.

ProStores provides a Design Checklist to help you prepare for making design changes. To view the checklist, click the **Guide: Design Your Store** link in the **Resources and Tools** section of the Store Design hub.

Design

This section shows you how to choose a design scheme for your design. You can use the design as is or modify it later using the ProStores Store Design tools to meet your needs.

<table>
<tr><th>Page</th><th>Description</th></tr>
<tr><td>Theme</td><td>This is where you set the overall look and feel for your site. Small images of each theme are presented on this page - for a larger view, click the image. To view additional themes, select a different category from the Theme Category pull-down menu.</td></tr>
<tr><td>Link Manager</td><td>Select the optional pages you wish to include in your store. You can also link to pages in an existing site.</td></tr>
<tr><td>Fonts and Colors</td><td>This page allows you to choose fonts and colors for three categories of fonts:
♦ Heading is the text that appears as the page title.
♦ Sub Heading is any sub heading fonts (usually used as category sub headings, or just a smaller heading font on a page).
♦ Paragraph is the standard body text.
This page also displays previews of selected font faces, sizes and colors against the background color in which they will appear.</td></tr>
<tr><td>Custom Text</td><td>Enter the text that you want customers to see on the pages you selected.</td></tr>
<tr><td>Page Template Manager</td><td>The page layouts set the body layout for three key pages in your store.
♦ Home Page: this is the first page a customer sees when they visit your store.
♦ Product List: this is the search results page that is displayed after searching for a product in your store, or when clicking a link that you’ve created to display a particular set of search results.
♦ Product Detail: this is the page customers see when reviewing detailed information regarding a product.
To help you choose your layouts, your theme selection will appear in the Design Settings section, along with thumbnail samples of the selected page layouts.

To view additional page layouts, click the Change link for a layout in the Design Settings section of Store Design.</td></tr>
<tr><td>Logo</td><td>This page allows you to add your business’s logo to the store. The image must be either a *.gif or *.jpg format file.
To upload a store logo:
1 Browse to Store Design. The Store Design page appears.
2 Click the Change link next to Logo in the Design Settings section. The Logo page appears.
3 Select the I will use a new store logo option.
4 Enter the file and path name, or click the Browse button to browse to its location on your local drive.
5 Click the Save button. The image will appear in your store if</td></tr>
</table>

Page	Description
	your store theme supports a store logo image.

Publish Your Store

This is the final step in Store Design. Many store design actions end by publishing the changes. However, if you've made any changes to your store design, and then clicked the **Save** button instead of the **Save and Publish** button in any of the Store Design pages, you will need to publish the page templates in order to see the changes in your live store.

To publish any unpublished changes to individual pages:

6. Browse to Store Design > Page Template Manager.
7. In the **Page Template** section, click the **Show All** link to expand all the categories. The status column for each page template that has unpublished changes will display the "New edits not published" message.
8. Select the check box for each page that you want to publish.
9. Click the **Publish** button. The status for the pages that were published will no longer show the message.

To publish any unpublished changes to all pages:

10. Browse to Store Design > Page Template Manager.
11. In the **Page Template** section, click the check box next to the **Page Template** section title. This will select all page templates.

    You can also select all page templates within a particular category by selecting the check box for the category.

12. Click the **Publish** button.

Working with ProStores Store Design

This option is only available if it has been enabled by your Site Administrator

ProStores Store Design is a tool that allows you to design your store, including customizing individual templates, or changing the overall look and feel of your site.

Prior to using Store Design, you should have a good idea in mind of how your store will look.

Also, remember that your store's navigation and page structure is defined by the header and footer templates - changes to those templates will change the look and feel of your entire store.

Please refer to the Designer's Reference and Object Reference for information on working with templates and tags.

Creating a Splash Page

Advanced Mode

This option allows you to create a new HTML page that search engines can find and index to better market your store. However, some search engines will *not* spider "splash" pages, so use this feature with caution.

This tool creates a very simple page that you will likely want to edit. To do so, use the Support Manager | File Management tool to download the file, make your edits, and then upload it (either using FTP, or the Upload Static Page tool) when done.

To create a static page:

1. Browse to **Support | Create Static Page**. The Create Static Page page appears.
2. Enter a file name (including the .htm or .html extension) for the new page. If you use "default.htm", this page will overwrite the page that has links to your Store Administration area and Storefront. If you do not want to overwrite this page, use another name.
3. Enter a **Title** for the static page. This appears in the title bar of the browser. Some search engines use this, some don't.
4. Enter a brief description of your store in the **Meta Description** field. Again, some search engines use this, while others don't. Also, some search engines will use this text to describe your site when displaying search results. While there are no formal limits on the number of characters you can use, generally most engines will look at the first 200 characters.
5. Select the desired options under **Place in Meta Tags** to place the categories and/or products inside meta tags. Some search engines look in meta tags and some don't. Including product information could result in a very large page.
6. Select the desired options under **Place in Page Body** to place the categories and/or products inside the main body of the page. Again, including product information could result in a very large page.
7. Click **Submit** to save your work and create the page.
8. You can download and edit the page by using the *Managing Files* (page 163) feature. The page is located in the Store Content area of the File Manager.

Once the file is created, you can browse to it by entering one of the following addresses in your browser's address box:

- If you have a dedicated domain name (such as www.mystore.com), use "www.mystore.com/stores/[store shortname]/[filename.ext]"
- If you have a shared domain name (such as www.stores.com/mystore/), use "www.stores.com/[filename.ext]"

Uploading Images

You can upload both single image files, and archived zip files. You can also upload images using the **Upload Images** wizard.

The maximum file size for uploading a single image or image archive is 10 MB. Image names may not contain spaces. In addition, archive files must be created in the standard ZIP file format.

Category, Manufacturer and Product Images, and Favorites Icon

The Category, Manufacturer and Product images are used to describe your product catalog. The “Favorites” icon is displayed next to your url in the browser’s address bar, and in your “Favorites” menu when a page is bookmarked. To upload an image, icon or archive:

1. Browse to Support > Upload Images. The Upload Images page appears.
2. Under **Shared Images**, select the image type you are uploading from the list.
3. Enter the file and path name, or click **Browse** to browse to its location on your local drive.
4. Select the type of file you’re uploading from the list.
5. Click **Upload**. The image(s) will be uploaded to the appropriate directory in the Store Content Area. If you uploaded an archived zip file, the images will be expanded in the directory to which you have imported them, and the archive file will be deleted.
6. To automatically generate thumbnails from product images, select the **Generate thumbnail from product image** check box (only available for product images), then select the size of the thumbnails you wish to generate.

Generated thumbnail images will be in the .jpg format, which does not support transparency. If a product image is a .gif with a transparent background, the generated thumbnail .jpg will contain a solid color where the .gif was transparent.

Your “Favorites” icon must be named “favicon.ico”. In addition, its appearance in Internet Explorer is somewhat inconsistent.

7. Browse to Support > Upload Images. The Upload Images page appears.
8. Enter the file and path name, or click the **Browse** button to browse to its location on your local drive.
9. Select the type of file you’re uploading from the list.
10. Click **Upload**. The image(s) will be uploaded to the appropriate directory in the Store Content Area. If you uploaded an archived zip file, the images will be expanded in the directory to which you have imported them, and the archive file will be deleted.
11. To automatically generate a thumbnail from the photo image, select the **Generate thumbnail from product image** check box, then select the size of the thumbnail you wish to generate.

Generated thumbnail images will be in the .jpg format, which does not support transparency. If your product image is a .gif with a transparent background, the generated thumbnail .jpg will contain a solid color where the .gif was transparent.

Store Logo

You can specify an image that serves as your store logo. Once you have indicated that you wish to use a logo, and have uploaded it, the image will appear in the storefront.

If the image does not appear in the storefront, add the following code to the location in which you would like the logo to appear:

```
<ss:if test="$store.isFeatureEnabled('StoreLogo')">
  <ss:image source="$storeVersion.storeLogo" border="0"/>
</ss:if>
```

To upload a store logo:

1 Browse to Store Design. The Store Design page appears.

2 Click the **Change** link next to Logo in the **Design Settings** section. The Logo page appears.

3 Select the **I will use a new store logo** option.

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

5 Click the **Save** button. The image will appear in your store if your store theme supports a store logo image.

To remove a store logo:

1 Browse to Store Design. The Store Design page appears.

2 Click the **Change** link next to Logo in the **Design Settings** section. The Logo page appears.

3 Select the **I will not use a store logo** option.

4 Click the **Save** button. The image will no longer appear in your store.

Store Design Images

These are images that used for your general store design, such as theme images. There are several methods for uploading these images.

To upload an image from your machine using ProStores Store Design:

You must be using Internet Explorer version 5.5 or higher to use this feature.

1 Browse to Store Design > Page Template Manager. The Page Template Manager page appears.

2 Click the title link of the page template that will hold the image. The page template opens in the Page Template Editor.

3 Click the **Advanced Editor** tab.

4 Using Windows Explorer, find the image you wish to add, and then “drag” it onto the page template where the image should go. The Upload and Insert Image dialog box appears.

> In newer versions of Internet Explorer, you may need to click once inside the Advanced Editor to activate the control.

5 Set the options for the image, such as adding alt text, and click the **Insert** button. The image appears in the template.

6 Click the **Save and Publish** to publish the change, or click the **Save** button to save the change without publishing it to your store.

To upload a store design image or an image archive using the Upload Images tool:

1 Browse to Support > Upload Images. The Upload Images page appears.

2 Under **Store Design Images**, enter the file and path name, or click the **Browse** button to browse to its location on your local drive.

> If you are using multiple store versions, select the appropriate version from the **Store Version Name** pull-down menu.

3 Select the type of file to upload from the **File Type** pull-down menu.

4 Click the **Upload** button. If you upload an archived ZIP file, the images will be expanded in the directory to which you have imported them, and the archive file will be deleted.

You can also upload an image from another Web site using the ProStores Store Design Copy Center tool (if you are using Internet Explorer version 5.5 or higher).

To copy an image from another Web site:

5 Navigate to Store Design > Page Template Manager.

6 Open the page template that want to copy content into using one of the two methods for opening a page in the Page Template Editor.

- ♦ Click the title of the page template.
- ♦ Select the check box next to the page template, and then select **Edit Page Template** from the **More Actions...** pull-down menu.

7 Click the **Advanced Editor tab**.

8 Click the **Copy Center** button () on the tool bar. The Copy Center opens in a new window.

9 In the Copy Center window, enter the full HTTP address of the Web page from which you wish to copy content, and click the **Go** button. The Web page appears in the Copy Center window.

10 Use your mouse to select the content you wish to copy in the Copy Center, and then drag the content to the appropriate location in the Advanced Editor.

To make content selection easier, right-click inside the Copy Center window and clear the **Browser mode** option.

11 In the **Migrate Embedded Image** dialog box, select one of the two URL options:

- ♦ **Leave the Source URL ...** inserts the image, but continues to point to the original source file (instead of uploading the image to your store).
- ♦ **Copy the image ...** uploads the image to your store's directory on the server, and then points to that uploaded image.

12 (Optional) Select the check box to apply the selection to the remaining images that you copy from this Web page.

13 When done, close the Copy Center window.

Uploading Files

This option is only available if it has been enabled by your Site Administrator

You can upload both single files (such as HTML pages, multimedia files, JavaScript files, style sheets, etc.), and archived zip files. Images should be uploaded using the *Uploading Images* (page 18) feature.

The maximum file size for uploading a single file or file archive is 10 MB.

To upload a file or file archive:

1 Browse to **Support** > **Upload Files**. The Upload Files page appears.

2 Select the file type you are uploading from the list.

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

4 From the **File Type** pull-down menu, select the type of file to upload.

5 Click the **Upload** button. The file(s) will be uploaded to the root directory in the Store Content Area. If you uploaded an archived zip file, the files will be expanded in the root directory, and the archive file will be deleted.

Once you have added the file, you can access it using the $store.files['FILENAME.xxx'] syntax.

Chapter 3: Preparing to Do Business

Once you've designed your store (or while your designer is working on your store design), you'll need to set up key ProStores options before customers can shop at your store. Some of these options include setting up payment methods, sales tax and shipping tables.

Setting Store Preferences

Store preferences include store status and mail preferences. These features can all be found in the Store Manager.

Understanding Security

Advanced Mode

Cookies

A cookie is information that a web site puts on your hard disk so that it can remember something about you at a later time. Typically, a cookie records your preferences when using a particular site.

ProStores uses cookies to aid in your customers' shopping experience. These cookies track only two kinds of information: the customer's shopping cart, and if you have a members-only area, the customer's user id. These cookies will expire based on the setting in Store Manager | General Preferences, Cart Available field. If a customer's browser does not accept cookies, they may have difficulty shopping at your store.

In addition, cookies are used to track login information in Store Administration.

Secure Socket Layer (SSL)

SSL is a Secure Sockets Layer that provides security in transferring data over the Internet. The SSL must exist on both the web server and the web browser to form a layer of encryption between the server and client. This is particularly important in a commerce situation, as the shopper is providing you with their personal information and often with their credit card number.

Usually, SSL is pre-installed in the customer's browser. Older versions of Netscape and IE may need to be updated if the customer is unable to access web pages that are secured under the SSL. When a customer accesses web pages protected by an SSL, or sends data over these pages, the data is encrypted during the transmission.

An SSL is marked by an "s" in the URL. For example: `http://www.mystore.com/` is not protected under an SSL, but `https://www.mystore.com/` is protected.

There are several authorities in charge of issuing SSLs, including VeriSign and Thawte. To obtain an SSL, a Key must be generated by the web server software on the server, using information about the business that owns the domain name. The Key must be generated on the common name that the store owner intends to use the SSL on. The SSL is also installed on that common name.

For example, if the domain name is **store.com**, then one possible name is **www.store.com** (another would be **store.store.com**). Once the SSL authority has validated the business, they will issue the SSL. It will then need to be installed on the web server and enabled by your Site Administrator. Once the SSL is installed, SSL must also be turned on within ProStores Store Administration. This can be done in the Store Manager area, General Preferences.

Credit Card Information

ProStores protects credit card information in several ways: the information is encrypted; the information can be hidden in Store Administration; and the information is not included in any exports from Store Administration.

General Preferences

This page allows you to define your store, demographic, and locale information options.

To set up your general preferences:

1. Browse to **Store** | **General**. The General Preferences page appears.
2. Enter your information or edits. See *Field Help: General Preferences* (page 23) for more information.
3. Click **Submit** to save your work.

Field Help: General Preferences

Store Information

Enter your business name, business address, phone numbers and contact e-mail address. Your store's URL may only be changed by your Site Administrator.

To access your eBay seller account, click the **Grant Permission** link.

Select the **Open** check box to open the store. If you are making significant changes to your store inventory or design, you may want to close the store by clearing this check box. A closed store will display a note to customers that the store is currently closed. You can also open and close the store by clicking on the **Open/Close** link on the Store Manager landing page.

Store Locale

Field	Description
Locale	Select a locale from the list. This will let the system know what formats to use for locale specific information, such as currency and date formats. The current selection display will be updated after clicking **Submit**. The Catalog and Catalog - Members-Only templates have currency

Field	Description
	information hard coded (therefore, currency information will *not* be updated based on your settings here). It is recommended that you check these templates (in Store Design) to ensure that they show the correct currency for this locale. If you plan on submitting product listings to eBay, your locale must be set to "en_US".
Currency Override Pattern	Use this field for those rare occasions when you want your currency formatting to appear different than the pattern specified by your locale settings. Enter the pattern using the following characters: ■ 0 (Digit) ■ # (Digit, zeros do not display) ■ . (Monetary decimal separator) ■ - (Minus sign) ■ , (Grouping separator) ■ ; (Separates positive and negative subpatterns) ■ % (Multiply by 100 and display as percent) ■ \u00A4 (Placeholder for the locale currency symbol. If doubled, the international currency symbol for the locale is used) For example, \u00a4#,##0.00;(\u00a4#,##0.00) will display positive currency values as $1,234.56 and negative currency values as ($1,234.56) when the English (United States) locale is selected.
	If you include the currency symbol in your pattern, ProStores recommends that you use either the Unicode escape sequence representing the currency symbol, or the actual symbol. If you choose to use an entity reference instead, it is possible that the symbol will not appear correctly in e-mail templates.
	Select the **Reset** check box to use the default pattern override defined by your Site Administrator.
Currency Symbol Override	Use this field for those rare occasions when you want your currency symbol to appear different than the currency symbol specified by your locale settings. Enter the currency symbol you wish to have displayed.
	ProStores recommends that you use either the Unicode escape sequence representing the currency symbol, or the actual symbol. If you choose to use an entity reference instead, it is possible that the symbol will not appear correctly in e-mail templates.
	Select the **Reset** check box to use the default symbol override defined by your Site Administrator.
Time Zone	Select the time zone in which you wish this store to be based. This will impact how dates and times are recorded and displayed.

Field	Description
Examples	Displays samples of how dates, currency and percentages will be displayed. This information will be updated after clicking **Submit**.
Product Weight Unit	Enter the unit of measure to be used when entering product weights in the Product Manager (such as lb, kg, etc.). Choose a unit of measure that can be used for all products. It is important to use the same weight unit for all products if your shipping table is based on product weight. Using different weight units in this case would result in incorrect shipping charges. Your shipping processor may require certain values in this field to calculate your Quote Basis. Please refer to the documentation for your specific processor.
Product Dimension Unit	Enter the unit of measure to be used when entering product dimensions in the Product Manager (such as in, cm, yards, etc.). Choose a unit of measure that can be used for all products.

Security

Field	Description
Store	*This option is only available if it has been enabled by your Site Administrator*. Select this check box to enable security for all store pages. Doing so will require all visitors to log in to the store via a pop-up window. This feature is often used when developing a store, so that you may view your work without allowing the store to be accessed by the public.
Admin	Security options for Store Administration. **Enable security for all administration pages**: Select this check box to require all visitors to log in to Store Administration via a pop-up window. **Enable SSL for all administration pages**: Select this check box to enable SSL for the administration area. Do not select this option before installing SSL. Doing so will shut you out of Store Administration. *This option is only available if it has been enabled by your Site Administrator* See *Understanding Security* (page 22) for more information.

Customer Number Options

Before making changes to the customer number options, it is advised that you first close your store and ensure that no other users are on the system.

Field	Description
Prefix	Enter the prefix for your customer numbers. Enter this exactly as you want it to appear. The length of the prefix plus the number of digits cannot exceed 20. If you choose a numeric prefix, be sure to choose a numeric prefix that will never duplicate a customer number. For example, do not choose a three-digit prefix if the length of your customer numbers is set to 3 (see "Digits" below). If your prefix duplicates a customer number, you will not be able to view that customer using the Go Direct option.

Field	Description
Digits	Enter the length of your customer numbers. For example, if you enter a prefix of “KUR” and 5 for the number digits, the resulting number would appear as “KUR00000.”
Starting Number	Enter the starting number for assigning customer numbers. This is only valid for the first customer added, and cannot be changed once customers are added. If you delete all customers, then it will apply to the next customer.

Search and Cart Options

Field	Description
Max Per Page	Enter the maximum number of products to be shown per page when a customer performs a search.
Max Total Search	Enter the maximum number of search results to return. If you have a large product catalog, setting the maximum can help speed up the search process.
Max Links Per Page	Enter the maximum number of search results page links to return. If your **Max Total Search** setting is high, limiting this number will manage the number of “Next” links that are visible on a search results page. The default is 10.
Min Length	The number entered in this field, combined with the search criteria a customer enters, controls how the search engine looks for products when the customer performs product or manufacturer searches. If the customer enters a number of characters that is greater than or equal to the number that is entered in this field, the search engine will look for all instances of that block of characters in the product information. If the customer enters fewer characters than are entered in this field, the search engine will look only for that product information that begins with those characters. For example, if you enter “3” in this field, and the customer enters “dol” or “doll” (three or four characters respectively), the search results could include “babydoll” and “dolly”. However, if the customer only entered “do” (only two characters, less than the number entered in this field), the search results would only bring back “dolly.”
Cart Available	Enter the number of hours for which you want a customer’s cart to be remembered. While setting this as a lengthy period allows your customer to retain information in their cart, it can cause confusion if you frequently update product pricing. An entry of “-1” will cause the cart to be saved *only as long as the current browser is open*. As soon as the shopper closes their browser window, the cart is gone. An entry of “0” or a negative number other than “-1” will result in the cart being saved for one year. The cart is “remembered” by placing a cookie on the customer’s computer. This cookie is only used to manage the customer’s shopping cart. The cookie will be good only as long as you indicate in this field, and will expire after that time.

Field	Description
Add to Cart Button	Select the behavior you would like to have when customers add an item to their cart. You may either send the customer to their cart (default) or refresh the page that they are on and display a “item added to cart” image.
Checkout Options	Indicate the type of checkout your store will support. ■ **Require Customers to Sign-In** forces customers to provide you with an email address and password. ■ **Anonymous Checkout** allows a customer to check out without providing any customer information that will be saved to the Customer Manager. If a customer checks out anonymously, their customer information will only be saved with the invoice.
	If you enable anonymous checkout, you will lose the ability to use any feature that requires the customer to log in, including store credits, subscriptions, recurring billling, special authorization, member’s only, etc. Also, if you configure a promotion with “Limit use to once per customer” enabled, the promotion will only apply to registered customers.
Invoice	Select this check box to automatically empty the customer’s cart when they cancel an order during checkout.

Name and Address Options

Field	Description
Capitalization	Select this check box to automatically capitalize customer names and addresses entered by your customers and by using the Store Administration Customer Manager. This prevents names and addresses that have accidentally been entered with initial lower case letters from being saved.
Validate	**Rules:** Select this check box to validate all address related data entry against the *rules* for that field, such as whether a field should contain numbers or characters, should be a certain length, is required, etc. If you are using a credit card processor, this option must be checked. Also, if validations are not performing as expected, contact your Site Administrator to see if the Postal Edit, State and Postal Code tables have entries for the locale you are serving. **State Against Table:** Select this check box to compare the data entered in a State field to the data in the State table and ensure that it is valid. If you plan on having your Sales Tax or Shipping calculations based on the customer’s state, selecting this option will ensure that your Sales Tax and Shipping options are set up and calculating correctly by eliminating the chance that an incorrect State will be entered. **Postal Code Against Table:** Select this check box to compare the data entered in a Postal Code field to the data in the Postal Code table and ensure that it is valid.

Mail Preferences

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

To set up your mail preferences:

1. Browse to **Store** | **Mail**. The Mail Preferences page appears.
2. Enter your information or edits. See *Field Help: Mail Preferences* (page 28) for more information.
3. You can also enable Buyer Notifications on this page. See *Setting Up Buyer Notifications* (page 126) for more information. *(Advanced Edition only)*
4. Click **Submit** to save your work.

Field Help: Mail Preferences

Basic Information

Field	Description
Staff E-Mail	Enter the e-mail address of the person to receive the notices selected under Notification Options. To enter multiple e-mail addresses (up to 250 characters), enter each address separated by a comma.
Buyer E-mail	*(Advanced Edition only)* Enter the e-mail address of the store Buyer (used when sending Buyer Notifications). To enter multiple e-mail addresses (up to 250 characters), enter each address separated by a comma. See *Setting Up Buyer Notifications* (page 126) for more information.
Mail Server	Enter the SMTP server you use to send Internet mail.
Server Port	Enter the mail port for the server you use to send e-mail. The default port is 25.

Notification Options

Field	Description
Customer Notices	This section allows you to indicate when customers should be notified regarding store activity. **Send customer order confirmation**: Select this check box to e-mail customers when their order is confirmed. **Send customer credit confirmation**: Select this check box to e-mail customers when a credit has been processed. *(Advanced Edition only)* **Send customer shipping confirmation**: Select this check box to e-mail customers when their order has been shipped. *(Advanced Edition only)* **Send customer recurring payment confirmation**: Select this check box to e-mail customers when a new bill is sent out for a subscription. *(Advanced Edition only)* **Send customer subscription renewal notification**: Select this check box to e-mail customers when a subscription is renewed. *(Advanced*

Field	Description
	Edition only) **Send customer subscription cancellation notification**: Select this check box to e-mail customer when a subscription is cancelled. *(Advanced Edition only)*
Staff Notices	This section allows you to indicate when staff should be notified regarding store activity. **Copy staff on order and shipping confirmations**: Select this check box to e-mail staff when a customer places an order or a customer's order ships. **Copy staff on subscription cancellations**: Select this check box to e-mail staff when a customer cancels a subscription. *(Advanced Edition only)* **Send staff recurring payment error notifications**: Select this check box to e-mail staff when recurring payment errors occur. *(Advanced Edition only)* **Send buyer low inventory notifications**: Select this check box to e-mail your store Buyer when a product is low on inventory. See *Setting Up Buyer Notifications* (page 126) for more information. *(Advanced Edition only)*

Selecting Payment Options

ProStores allows you to offer multiple payment methods to your customers, including credit cards, checks, store cards, etc. This section covers how to make those options available to your customers.

Working with Payment Gateways

ProStores not only allows you to offer multiple credit card options to your customers, it also supports online payment processing using any of several payment gateways.

Understanding Payment Processors

Payment Processors are an integral part of e-commerce. A payment processor, often called a payment gateway, allows for real-time transactions to be conducted online. A Payment Processor acts as a processor between the merchant's online store and their merchant account, allowing for secure transactions of credit card and personal data, such as the customer's name, address, etc.

Payment Processors communicate with Merchant Accounts. A merchant account is an account that allows the business to accept credit cards as a method of payment. The money is then deposited into the merchant's bank account. Any merchant wishing to accept credit cards will need a merchant account. An existing merchant moving into online sales will most likely already have a merchant account.

You can apply for a merchant account right now. See *Merchant Account Setup* for more information. *This option is only available if it has been enabled by your Site Administrator*

Without a payment processor, a merchant can still accept credit cards, and process the card manually, off line, with ProStores. This method is time consuming, and if a merchant that is successfully selling online, they will want to consider using an online processor.

All payment processors are not compatible with all merchant accounts. The payment processor has to be able to securely receive highly sensitive data, credit card information and names and addresses of customers, to and from an entirely different computer system. If you already have an Internet merchant account, check with your provider to see if any of ProStores' built-in payment processors are compatible.

How Payment Processing Works

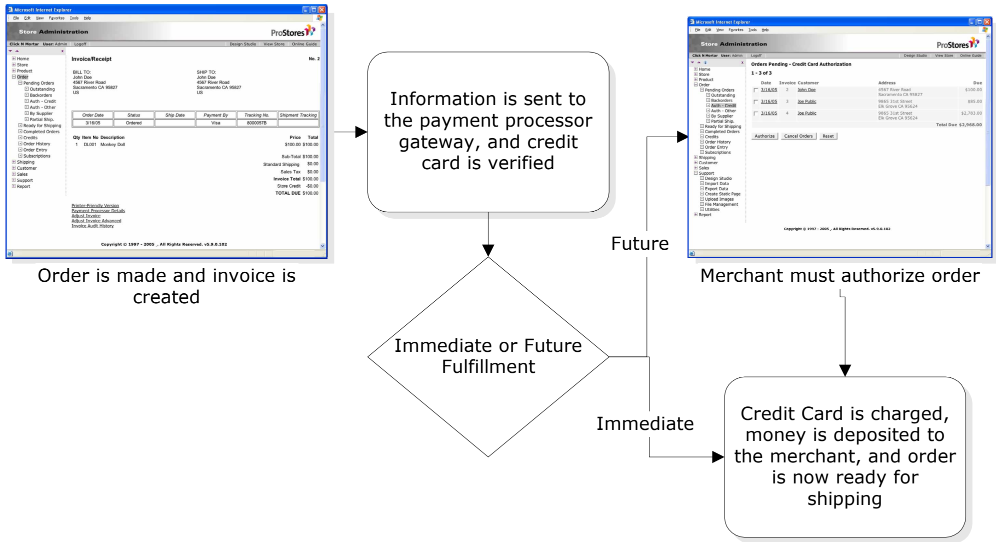
When a purchase is made, and the confirm order button is selected in a ProStores store, ProStores sends the order data to the Payment Processor. The data is encrypted and sent securely.

The payment processor then returns data to ProStores indicating that the order is acceptable and good, or unacceptable, and bad. Reasons that the order might be unacceptable include that the credit card has been reported stolen or the customer has incorrectly entered their credit card information.

If a merchant is an immediate fulfillment merchant, meaning all orders are sent within 24 hours, the payment processor sends the necessary information to the merchant account and the appropriate amount of money is deposited into the merchant's bank account while at the same time charging the customer's credit card.

If a merchant is a future fulfillment merchant, there will be a hold on the credit card for the amount that the order totals. This hold is generally referred to as an authorization. To release the authorization and charge the card, the merchant will need to mark the order as shipped in ProStores. This can be done in either the Order Manager or Shipping Manager areas.

Once the order has been marked shipped, ProStores will communicate with the payment processor again, marking the order for settling. The processor will send this information to the merchant's merchant account, so the money can be deposited into the merchant's bank account, and the customer's credit card can be charged.



The flow of information in an online credit card transaction

Merchant Account Setup

This option is only available if it has been enabled by your Site Administrator

Processing credits cards is a must for any business with an online presence. With ProStores, you can apply online for a merchant account that will allow you to process credit card payments online.

There are two locations from which you can start the application process:

- Getting Started page | Apply for a Merchant Account.
- Store | Payment | Credit Cards | Apply for a Merchant Account.

To apply for a merchant account:

1. Access the merchant application from one of the locations described above.
2. Review any information presented from within the application.
3. Follow the instructions given on the application. Some applications collect information from within ProStores, while some simply provide a link to follow to the third-party merchant services provider.
4. Complete any follow-up tasks that may (or may not) be required to complete the application process.
5. Once your application is received and approved, you will be given the information required to configure the payment processor. See *Configuring a Payment Processor* (page 31) for more information on configuring the payment processor.

Configuring a Payment Processor

If you will be processing credit cards online, your financial institution will send your merchant account information directly to a credit card processor. While you are in the process of obtaining your merchant account, you should go to the processor's web site to sign up as a new merchant. During the registration process, you will be prompted for information related to your store software and host.

You can apply for a merchant account right now. See *Merchant Account Setup* (page 31) for more information. *This option is only available if it has been enabled by your Site Administrator*

If your Site Administrator has enabled them, some payment processors will provide a link to their merchant application site. This link will appear on the configuration page for those processors that offer this feature.

To configure a credit card processor:

1. On the Store Manager | General Preferences page, select the **Validate Rules** check box.
2. On the Store Manager | Payment Preferences page, Credit Cards section, select a configuration option from the **Processor** list. A processor page appears.
3. If applicable, select whether your **Processor Type** is host based or terminal based. This information should be obtained from your bank when you set up your merchant account.
4. If applicable, indicate whether your **Fulfillment Method** is immediate (within 24 hours) or future. Your fulfillment method is important in setting up your account and determining when a customer's credit card will be charged. Immediate fulfillment should only be used when you are certain that the buyer will receive the product immediately (as is the case with downloading software, purchasing a subscription, etc.)
5. Enter any other processor specific information. See the Online Guide for details regarding your specific processor.
   - When configuring your credit card processor, it is recommended that you copy the information from the processor's web site and paste that information into these fields, where possible.
   - Some processors support the collection of an additional security code. If this is true of your processor, and you enable this feature, the fields to collect the information from your customers will automatically appear in the storefront.
6. Click **Submit** to save your work.

Be sure to turn your processor on only after you have received authorization from them to send test transactions.

If you are participating in a 30-day trial evaluation of ProStores, you will not be able to save your credit card configurations or process credit cards.

Testing Credit Card Payment Processors

We recommend that you test each type of credit card that you plan on accepting, using the test information that your payment processor has provided you.

To test your credit card processor:

1. Configure your payment processor. See *Configuring a Payment Processor* (page 31) for more information.
2. Browse to **Store** | **Payment Prefs**.
3. Under **Credit Cards**, select your payment processor, and then click **Configure**. The processor configuration page opens.
4. Select the **Test Mode: Enabled** check box, and then click **Submit**.
5. Obtain test credit card numbers from your processor for each credit card.
6. Place an order with the test card number(s).
7. Process the order using the Order Manager.
8. Issue a credit against that order using the Order Manager. To do so:
   - Search for the completed order.
   - Click the date to display the invoice.
   - Select **Issue A Credit**.
9. Once you have verified that the transactions are processing correctly, turn off the test mode. You can start accepting credit cards by selecting that option at your payment processor's web site.

   To turn off test mode, navigate to **Store Manager | Payment Preferences**. Under **Credit Cards**, select your payment processor, and then click **Configure**. Clear the **Test Mode: Enabled** check box and then click **Submit**.

Supporting Temporary Credit Card Numbers

In an effort to provide a more secure shopping environment for their credit card holders, several companies (such as American Express and Discover) are offering a payment method that operates as a "one-time use" credit card number. Stores that allow credit card payments should support the use of these one-time use credit card numbers.

However, if a customer who has shopped at your store previously with one of these credit card numbers tries to check out without changing their payment information, the credit card will not be processed properly. If a customer is using this payment method, they will need to update their payment information with every purchase.

Troubleshooting Credit Card Payment Processors

If you receive the following error:

```
Error message: "MerchantAuth: Order ID '##' has been completed already".
```

...then check for the following:

- You manually created an order with your credit card processor, and then ProStores generated an order using that same order number automatically for a customer purchase. If this occurs, delete the customer order and place another one.

- You have begun testing your processor before it has been configured in Store Manager | Payment Preferences.

Setting Payment Preferences Information

Payment Preferences allow you to enable credit card processing, payment options and other ordering options.

To set up your Payment Preferences:

1. Browse to **Store | Payment Prefs**. The Payment Preferences page appears.
2. Enter your information or edits. See *Payment Preferences* (page 34) for more information.
3. Click **Submit** to save your work.

Payment Preferences

Storewide Preferences

Field	Description
Order Limit	Enter the maximum dollar amount your store will accept for an individual transaction. It is not necessary to set a limit - this feature is optional. In addition, you may set individual customer limits in a customer's profile that will override the store limit (higher or lower).
Order Minimum	Enter the minimum dollar amount your store will accept for an individual transaction. It is not necessary to set a limit - this feature is optional. The order amount will be tested *after* the customer begins the checkout process. Therefore, any discounts applied after checkout begins (such as promotion codes) will not be included in the order minimum.
Invoice Starting Number	Enter the number from which you wish to start numbering invoices.
Security	*This option is only available if it has been enabled by your Site Administrator*. Select this check box to enable SSL during the order process. When the customer begins the checkout process, all activity through order confirmation will be SSL protected. You must have an SSL certificate installed to use this feature. Contact your Site Administrator for assistance installing an SSL certificate for your store.

Credit Cards

Field	Description
We Accept	Select the credit cards you accept, if any. If you have a store card, enter the name of that card. The store card option cannot be processed with an online payment processor. When a customer selects the store card during checkout, the invoice appears in the Pending Orders - Credit Card Authorization list, which you must then process offline.
Options	Select any of the options that apply.

Field	Description
	Require customers to provide credit card information: Select this check box to indicate if the customer is required to submit credit card information with their order, rather than sending it separately. If this check box is selected, the customer will not be allowed to complete the order process without entering their credit card information. However, they can complete the order if they go back and choose another payment option. *Advanced Mode* **Retain customer credit card information:** Select this check box to indicate if customer credit card information should be saved. With this option enabled, returning customers will not have to reenter their credit card each time they purchase from your store. If you are not using a payment processor and you accept credit cards, you must enable this option. *Advanced Mode*. *This option is only available if it has been enabled by your Site Administrator* **Require customer's country to match store country:** Select this check box if you wish to only accept credit cards from customers with a payment address in the store's home country. *Advanced Mode* **Show credit card information within administration:** Select this check box to display credit card numbers in the Customer Profile and Orders Pending Credit Card Authorization list. If you will be processing credit card numbers offline, you need to select this check box so that the information is available for entry into your terminal. If you will be synchronizing data with QuickBooks, you will need to select this check box so that the information is available to QuickBooks. *Advanced Mode* **Require ship-to phone number during checkout:** Select this check box if you want to require the customer to provide their phone number with their shipping information. Some payment processors require this information, and some shippers, such as UPS, require this information for generating shipping labels. Any customers that existed prior to enabling this feature will not be validated during checkout unless they choose to ship to a different address.
Merchant Account	To apply for a merchant account online, click **Apply for a Merchant Account**. See *Merchant Account Setup* (page 31) for more information.
Processor	If you are processing payments online, select the appropriate payment processor. Click **Configure** to enter the configuration information for the selected payment processor. To use PayPal as your credit card processor, select the **Use PayPal as your credit card processor** check box, and enter the information provided to you by PayPal. See *Configuring PayPal* (page 37) for more information. If you are using a credit card processor, you must select the "Validate Rules" check box on the Store Manager | General Preferences page.

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

PayPal Payments

Select the check box to accept standard PayPal payments. See *Configuring PayPal* (page 37) for more information.

It is recommended that if you do not have a PayPal account, you sign up for one before accepting PayPal. To do so, select the **sign up with PayPal now** link and register with PayPal. Otherwise, PayPal will e-mail you with sign up information the first time PayPal is used in your store. You will be able to approve and ship orders without a PayPal account.

Payment Options

Select the check box of each payment option you wish to accept. In addition, configure each payment option as follows:

Payment Option	Configuration Invoice Note Guidelines
Checks/Money Orders	Enter the note to appear when this is the selected payment option.
Electronic Checks	To accept electronic checks in your store, select the **Accept E-checks** check box. Then, select the electronic checks processor you wish to configure and click **Configure**.
Certified Checks	*(Advanced Edition only)* Enter the note to appear when this is the selected payment option.
Cash on Delivery (CODs)	*(Advanced Edition only)* Enter any special instructions for CODs.
Purchase Order	*(Advanced Edition only)* Enter the note to appear when this is the selected payment option and the customer has not yet been assigned a PO limit. You may want to add a note that an order will be held pending credit approval. If you accept purchase orders, you may want to establish purchase order limits for each customer.
Department Orders	*(Advanced Edition only)* Enter any special instructions for Department Orders.
WorldPay	*This option is only available if it has been enabled by your Site Administrator*. See Configuring World Pay for more information. WorldPay requires that you provide them with your Callback URL at WorldPay. To do so, log in to their admin area at https://select.worldpay.com/wcc/admin with your WorldPay supplied username and password, click on configuration, and enter your Callback URL as follows: http://<yourstoreurl>/Admin/WorldPayCallback.bok.

Configuring World Pay

This option is only available if it has been enabled by your Site Administrator

To configure WorldPay:

WorldPay does not accept subscription payments.

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1. Browse to **Store** | **Payment Prefs**. The Payment Preferences page appears.
2. Select the WorldPay payment option, and then enter the following information:
   - Enter the **Installation ID** you received from WorldPay.
   - If you have an **Account ID**, enter it here.
   - Select the **Authorization Mode** that your WorldPay account supports.
   - Select the **Enable WorldPay Test Mode** check box during testing of your WorldPay account. Be sure to clear this check box when testing is completed.
   - Select the **Fixed Contact** check box to prevent the customer from editing the customer information that the application sends to the WorldPay site.
   - In **Timeout by Minutes**, enter the amount of time the shopper can spend at the WorldPay site before WorldPay will no longer accept payment. The default is 20 minutes.
   - If you entered a **Callback Password** at the WorldPay site, you can enter that same Callback Password here for added security. Leave this field blank if you do not wish to use this feature.
3. Click **Submit**.
4. If necessary, edit the following templates:
   - WorldPay Payment Confirmation
   - WorldPay Payment Cancellation
   - WorldPay Callback Processing Error

WorldPay requires that you provide them with your Callback URL at WorldPay. To do so, log in to their administration area at https://select.worldpay.com/wcc/admin with your WorldPay supplied username and password, click on configuration, and enter your Callback URL as follows: **http://<yourstoreurl>/Admin/WorldPayCallback.bok**. Please contact WorldPay support for more information.

Configuring PayPal

This option is only available if it has been enabled by your Site Administrator

PayPal Direct Payment allows you to process credit card payments through PayPal. The customer stays on your website as PayPal processes the credit card transaction in the background.

PayPal does not accept subscription payments.

How it works

For each payment, the Direct Payment API takes the payment address, transaction amount, credit card information, and item information as inputs. Within seconds the API returns a confirmation that the transaction has been processed.

You must have a PayPal account to use PayPal Direct Payments and Express Checkout and also to receive payments made to PayPal by paying customers. If you do not have a PayPal account, PayPal will e-mail you with sign up information the first time a customer uses PayPal in your store. You can open a PayPal account by clicking the **sign up with PayPal** link under PayPal Payments and following the steps on the PayPal site.

To configure **PayPal Direct Payment**:

1. Browse to **Store** | **Payment Prefs**. The Payment Preferences page appears.
2. Under **Credit Cards**, select the **Use PayPal as your credit card processor** check box.

   Selecting **PayPal Website Payments Pro** as your credit card processor automatically enables **Express Checkout**, a PayPal feature that allows your customers to use shipping and payment information stored securely at PayPal when they check out instead of having to re-enter the information on your site.

3. Under **PayPal Payments**, enter the API Username, API Password, and PEM file provided to you by PayPal.
4. Select a **Fulfillment Type**.
5. Click **Submit**.

Express Checkout

How it works

1. After selecting products to purchase, your customer chooses to check out with PayPal.

2. The customer is transferred to PayPal to select the payment method and the correct shipping and payment address. They are then returned to your website to complete their purchase.

3. PayPal automatically gives you the shipping address, email, and other customer information needed to fulfill your order.

To configure **Express Checkout**:

1. Browse to **Store** | **Payment Prefs**. The Payment Preferences page appears.
2. Under **PayPal Payments**, select the **Express Checkout Accepted** check box.
3. Enter the API Username, API Password, and PEM file provided to you by PayPal.

4 Select a **Fulfillment Type**.

5 Click **Submit**.

PayPal Payments allows the customer to checkout using the standard PayPal payment method. When the customer clicks on the **PayNow!** button on the invoice, they will be forwarded to PayPal to complete the transaction. See *PayPal Order Process* (page 131) for more information.

To configure standard **PayPal Payments**:

It is recommended that if you do not have a PayPal account, you sign up for one before accepting PayPal. To do so, select the **sign up with PayPal now** link and register with PayPal. Otherwise, PayPal will e-mail you with sign up information the first time PayPal is used in your store. You will be able to approve and ship orders without a PayPal account.

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1 Browse to **Store | Payment Prefs**. The Payment Preferences page appears.

2 Under **PayPal Payments**, select the **Yes** check box under the **Accepted** column for Standard payments, and enter the **Email for PayPal payments** address that you have associated with your PayPal account. This field is required.

3 Enter the following optional information:

- **Item Name**. This name appears on PayPal's payment pages, and describes the order generated by your store. For example, "Online Order from [Store Name]".
- **Submit Image URL**. This image appears on the PayPal Purchase Token page instead of a standard form button. For example, you could use a store logo image instead of the standard form button. Be sure to enter the complete URL, which you can often copy from the image's properties. See **Note** below.
- **Submit Text**. This text appears on the PayPal button. If you have entered a **Submit Image URL**, this text will be used as the image's ALT text instead.
- **Store Image URL**. PayPal uses this image to represent your store. Be sure to enter the complete URL, which you can often copy from the image's properties. See **Note** below.
- Select the **Customer Note** check box if you do **not** want to allow the customer to enter a note, while at PayPal, that will appear on their order.
- **Invoice Note**. Enter text that appears if the customer uses PayPal.

Consider only using images if you are using SSL. Otherwise, your customers may receive a security warning. They will still be able to complete their transaction, but the warning may cause them concern. If you are using images and SSL, remember to use 'https://' instead of 'http://' in your image URLs.

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4 Click **Submit**.

5 If necessary, edit the PayPal Purchase Token template.

For more information regarding PayPal, please see the PayPal Help Center.

Shipping Preferences

ProStores provides multiple options for calculating shipping charges for an order. You can:

- Create Shipping Tables using the Merchant-Defined Shipper.
- Create Shipping Tables using both the Merchant-Defined Shipper (to provide shipping estimates during the shopping process), and one or more custom shippers enabled by your Site Administrator, such as Federal Express or UPS.
- Select which of the available shippers appear on your store.
- Configure available shippers.
- Create Shipping Tables, *and* exclude specific products from them. *(Advanced Edition only)*
- Bypass the use of Shipping Tables completely by defining a shipping surcharge for each product individually. See *Maintaining Product Profiles* (page 89) for more information. If you choose this option, you should create a “0” Shipping Level. See *Creating Shipping Levels* (page 42) for more information *(Advanced Edition only)*

To configure your Shipping Tables:

1. Browse to **Store | Shipping Prefs**. The Shipping Preferences page appears.
2. Select the check box for each shipper you wish to use from the **Available Shippers** list.

   If you plan on using a shipper other than the Merchant-Defined Shipper, you should still configure the Merchant-Defined Shipping Tables. These tables will be used to provide shipping estimates to your customers when they view their cart and begin the checkout process.

3. Click **Apply**.
4. Refer to the documentation for the shipper you selected to complete the Shipping Tables configuration process.

Setting Up Merchant-Defined Shipping Tables

Shipping Tables define how your store will calculate shipping charges to the customer.

Your site administrator may offer shippers other than the Merchant-Defined Shipper. However, even if you use another shipper, such as FedEx, UPS, or USPS, you should still configure the Merchant-Defined Shipper, as it provides shipping estimates to your customers if the other configured shippers fail to provide shipping rates during the checkout process.

The Merchant-Defined Shipper is based on Shipping Tables, which are made up of the following pieces:

- **Shipping Basis** defines whether your shipping rates are based on order amount, product weight or product quantity.

- **Ship To Location Basis** determines whether your shipping rates are based on State/Province or Postal Code.
- **Shipping Methods** define the shipping options from which the customer can select (such as Two-Day, Overnight, etc). You can define up to three Shipping Methods. You may also change the delivery method name for storefront display.
- **Shipping Levels** is a table that identifies shipping rates based on **Shipping Basis** and **Shipping Methods**.
- **Shipping Zones** is a matrix that determines how those Shipping Level rates are applied based on your **Ship To Location** basis. You can also customize your **Shipping Level** table for each shipping zone.

To set up your Shipping Tables:

1. Browse to **Store | Shipping Prefs**. The Shipping Preferences page appears.
2. Select the Merchant-Defined Shipper from the **Active Shipper** list.
3. Select your **Shipping Basis** and **Ship to Location Basis** and click **Apply**. You *must* click **Apply** when changing the Shipping Basis or the Ship To Location Basis. You must do this *before* modifying Shipping Preferences, Levels, or Methods.

   If you select a Shipping Basis of Total Product Weight, you should define a **Product Weight Unit** (on the Store Manager | General Preferences page), and enter a weight for every product in your catalog.

4. You may edit the text of each **Shipping Method** to change the text titles for your three Shipping Methods. See *Defining Shipping Methods* (page 41) for more information. *Advanced Mode*
5. Click **Shipping Levels** to define your Shipping Levels. See *Creating Shipping Levels* (page 42) for more information. *Advanced Mode*
6. Add your **Shipping Zones**. See *Defining Shipping Zones* (page 42) for more information. *Advanced Mode*

Defining Shipping Methods

Advanced Mode

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

To label your Shipping Methods:

1. Locate the edit controls on the Shipping Preferences page next to **Shipping Methods**.
2. Enter a label for each method. The label can be up to 25 characters.
3. Click **Submit** to save your work.

Creating Shipping Levels

Advanced Mode

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

To add a Shipping Level:

1. From the Shipping Preferences page, click the **Shipping Levels** link (at the bottom of the page). The Shipping Levels page appears.
2. Enter the shipping level's upper limit for the Shipping Basis that was selected. For example, if this level is to apply to a total product weight between 0 and 25 kilograms, enter "25".
3. Enter the amount to charge for shipping the package for each Shipping Method.
4. Click **Add Level**. The information appears in the Shipping Levels table.

To update your Shipping Levels:

1. From the Shipping Preferences page, click the **Shipping Levels** link (at the bottom of the page). The Shipping Levels page appears.
2. Click **Set Defaults**. The Shipping Level Defaults page appears.
3. Update the information in each field.
4. Click **Submit** to save your work.

To delete a Shipping Level:

1. From the Shipping Preferences page, click the **Shipping Levels** link (at the bottom of the page). The Shipping Levels page appears.
2. Select the check box next to the shipping level you wish to delete in the Shipping Levels table.
3. Click **Delete**. The shipping level(s) are removed.

Defining Shipping Zones

Advanced Mode

Zones represent the geographic regions used to determine shipping costs.

Use shipping zones to create your rules for applying shipping charges. Shipping charges are automatically entered on the invoice when the customer makes a purchase. Shipping Zones use the Shipping Levels created earlier as the default for that shipping zone. You can customize these shipping levels as necessary for each shipping zone.

A default shipping zone is set up based on Total Order Amount and State/Province and Country - it is recommended that you do *not* remove this shipping zone.

To add a Shipping Zone:

1 From the Shipping Preferences page, click **Add Zone**. The Add Shipping Zone page appears.
2 Enter the information in each field. See *Field Help: Shipping Zones* (page 43) for more information.
3 Click **Submit** to save your work.

To update a Shipping Zone:

1 From the Shipping Preferences page, click the link for the shipping zone you wish to update.
2 Enter the information in each field. See *Field Help: Shipping Zones* (page 43) for more information.
3 Click **Submit** to save your work.

To delete a Shipping Zone:

1 From the Shipping Preferences page, select the shipping zone's check box.
2 Click **Delete Zone(s)**. The shipping zone(s) are removed.

Field Help: Shipping Zones

Zone Information

Field	Description
Name	Enter the name of the Shipping Zone. If this is your default Shipping Zone, enter **Default**.
State/Province	Enter the state/province to which the Shipping Zone applies. This option is only available if your **Ship To Location Basis** is State/Province. Use the appropriate abbreviation, if applicable. The value entered here will be used to match the state/province for the shipping address. To have this Shipping Zone apply to all states/provinces for a country or for all countries, leave the field blank.
Country	Enter the country to which the Shipping Zone applies. It is recommended that you use the `<ss:select source="$system.countries" name="$customer.country" selected="$store.country"/>` tag on the Checkout - New Customer template if you plan to use this feature. Doing so will ensure that the country selected for the shipping address will match the country selected here. To have this Shipping Zone apply to all countries (your default), select the "All" option at the top of the list.
Postal Code Range	Enter the zip/postal code range to which this Shipping Zone applies. This option is only available if your Ship To Location Basis is Zip Code/Country. You must provide a starting postal code as well as an ending postal code. All codes within this range will use this Shipping Zone. If this is your default Shipping Zone, set the low end of the range to "00000" and the high end to "99999."

Level Information

Field	Description
Standard*	Enter the amount to charge for the default shipping rate.
Two Day*	Enter the amount to charge for shipping the package in two days.
Next Day*	Enter the amount to charge for shipping the package using next day air service.

*The Shipping Labels on these fields will match the Shipping Labels defined in Shipping Methods. See *Defining Shipping Methods* (page 41) for more information.

Suppressing A Shipping Method

By default, the Merchant-Defined Shipper expects the merchant to use the three available shipping methods provided by the Merchant-Defined Shipper. If you wish to use only one or two, you can modify the code as described below.

Checkout and Checkout New Customer Templates

Delete the following code...

```
<p>
  <b>Shipping Method</b><br>
  <ss:foreach item="shipQuote" within="$cart.shippingQuotes">
    <ss:radio name="shipme" source="$shipQuote.shipMethod"
checked="$counter.currentRow==1"/> 
    <ss:value source="$shipQuote.name"/> (<ss:value source="$shipQuote.amount"
format="money"/>)
    <br/>
  </ss:foreach>
</p>
```

...and replace it with this code (removing the option you do *not* wish to offer):

```
<p>
  <b>Shipping Method</b><br>
  <input type="radio" name="shipme" value="S" checked> US Postal Service Ground
($5.105)<br/>
  <input type="radio" name="shipme" value="2"> US Postal Service Priorit
($7.95)<br/>
  <input type="radio" name="shipme" value="N"> Next Day ($14.95)<br/>
</p>
```

Invoice Template

Replace...

```
<ss:include template="selectshipping"/>
```

...with

```
<ss:value source="$cart.shipping"/>
```

Federal Express Shipper

Advanced Mode
This option is only available if it has been enabled by your Site Administrator

Federal Express allows you to utilize the shipping calculations and services developed by Federal Express.

You must already have an account with Federal Express before you can use this shipper. In addition, new setups (or meter number generation), require a store address and phone number to be entered on the General Preferences page. The phone number must use the following format: 123-456-7890. Finally, if ProStores is unable to obtain a rate from Federal Express for any reason, it will look to the Merchant-Defined Shipping tables for rates. To configure your Merchant-Defined Shipping tables, see *Setting Up Merchant-Defined Shipping Tables* (page 40) for more information.

To set up Federal Express:

1 Browse to **Store | Shipping Prefs**. The Shipping Preferences page appears.

2 Select Federal Express from the **Active Shipper** list. The page will be updated with the information needed to configure Federal Express.

3 If necessary, select the packing algorithm you wish to use from the **Active Packing Algorithm** list. The algorithm is used to calculate the number of shipping containers you will need by size, and generate the Shipping Labels for those shipping containers.

4 Select the **Quote Basis** you wish to use

- If **Total Order Weight** is selected, the shipping rate will be calculated upon the total order weight (as if all items were to be packaged in one container). If you want the shipping rate to be calculated as though items are going to be packaged in separate shipping containers, select **Packing Algorithm**.
- If you select **Packing Algorithm**, and you want the algorithm to determine which shipping containers should be used for each order, you must then define Shipping Containers. See *Shipping Containers* (page 51) for more information. Otherwise, the algorithm assumes that each Product has a shipping container of “Self” (one product per container). In addition, it is recommended that you enter the weight and dimensions for every product to ensure an accurate quote at checkout, and enter a Product Weight Unit in Store Manager | General.
- If you have products that are large in volume, but do not weigh much, then you may want to use the Packing Algorithm as your Quote Basis to get an accurate rate quote. Federal Express uses a “Dimensional Weight” (L x W x H / 194). If the Dimensional Weight is greater than the *actual weight* of the package, then it will be used for the rate quote. For example, if you have a product that is 14 inches long, 15 inches wide, 16 inches tall and weighs 2 pounds, then the algorithm will use the Dimensional Weight of 17.3 pounds, rather than the actual weight of 2 pounds, to calculate the rate quote. (See the Federal Express guidelines for more information).
- If you intend on using the freight service types, then you must select the Packing Algorithm as your Quote Basis, and your products must have dimensional values (such as Length, Width and Height).

5 Enter your Federal Express **Account Number**.

6 Select the **Service Types** you wish to offer your customers. Refer to your Federal Express documentation for more information regarding Service Types.

7. Click **Update** to save your work.

If you have upgraded ProStores Store Administration from version 4.1.2 or lower, you will need to edit your templates as follows:

Invoice Template

```
<ss:if test="$invoice.invoiceNumber == 0">
  <ss:include template="selectshipping"/>
<ss:else/>
  <td colspan="4" align="right">
    <ss:font source="$font.paragraph">
      <ss:value source="$invoice.shipMethodDescription"/> Shipping
    </ss:font>
  </td>
  <td align="right" nowrap>
    <ss:font source="$font.paragraph">
      <ss:value source="$invoice.shipping"/>
    </ss:font>
  </td>
</ss:if>
```

Ship To and Ship To Gift Templates

```
<ss:edit source="$address.phone" size="20"/>
```

Canada Post Shipper

Advanced Mode
This option is only available if it has been enabled by your Site Administrator

The Canada Post Shipper allows you to utilize the shipping calculations and services developed by Canada Post.

You must already have an account with Canada Post before you can use this shipper.

To set up Canada Post:

1. Ensure that you have set your locale to a Canadian locale such as en_CA or en_FR (in **Store** | **General**).
2. Browse to **Store** | **Shipping Prefs**. The Shipping Preferences page appears.
3. Select Canada Post from the **Active Shipper** list. The page will be updated with the information needed to configure Canada Post.
4. Enter your Canada Post **Merchant ID**.
5. Define your packing shipping containers, then assign them to your products. See *Shipping Containers* (page 51) for more information. In addition, it is recommended that you enter the weight and dimensions for every product to ensure an accurate quote at checkout.
6. Click **Update** to save your work.

UPS Shipper

Advanced Mode
This option is only available if it has been enabled by your Site Administrator

By selecting the UPS Shipper, you will be able to utilize the following UPS Online® Tools:

- Tracking
- Rates and Service Selection
- Shipping

If you use the UPS Shipper, ProStores displays the UPS Trademark and accompanying disclaimer on each invoice and shipping related screen viewed by your customers. These elements are permanent and may not be modified or deleted. If these items do not appear, you will be prompted by ProStores to add the `<ss:include macro="ShipperCopyright"/>` to the Tracking, Invoice, Invoice-Print and Invoice-Email templates.

To set up UPS:

1. Browse to **Store | Shipping Prefs**. The Shipping Preferences page appears.
2. Select UPS from the **Active Shipper** list. The page will be updated with the information needed to configure UPS.
3. Before you can configure the UPS Shipper, you will need to register with UPS. To do so:
   - Click **Submit** to begin the registration process.
   - Review the license agreement, select the "Accept" option at the bottom of the page, and click **Submit**.
   - Review your company information and enter any additional information.
   - Make sure the store phone number does not contain any punctuation or parentheses.
   - If you have a UPS account number, enter it here. An account number is required for printing Shipping Labels. If you don't already have an account number and want to print Shipping Labels, then click the link to go to the UPS web site and open an account.
   - Click **Submit**. The registration process is complete, and the UPS Configuration options appear.
4. Select your quote basis.
   - If **Total Order Weight** is selected, the shipping rate will be calculated upon the total order weight (as if all items were to be packaged in one container). A weight value must be entered for each product if you are using Total Order Weight. If you want the shipping rate to be calculated as though items are going to be packaged in separate shipping containers, select **Packing Algorithm**.

- If you select **Packing Algorithm**, and you want the algorithm to determine which shipping containers should be used for each order, you must then define Shipping Containers. See *Shipping Containers* (page 51) for more information. Otherwise, the algorithm assumes that each product has a shipping container of "Self" (one product per container). In addition, it is recommended that you enter the weight and dimensions for every product to ensure an accurate quote at checkout.

5 Select your customer classification, pickup methods, and delivery method(s).

6 If you wish to include insurance on all packages, select the **Include Insurance** check box.

7 If you would like your customers to receive e-mail notifications from UPS when packages are shipped, select the **Email shipment notification** check box. These notifications are e-mailed when you generate packing Shipping Labels.

8 Click **Submit** to save your work.

- To update your account information (such as changing your Pickup Postal Code or adding/updating your UPS Account Number), you will need to re-register. To do so, select the **Re-Register** check box and click **Submit**.

9 If you wish to generate UPS shipping labels, the Customer must provide a ship-to phone number when checking out. To require a ship-to phone number, perform the following steps:

- Navigate to **Store Manager | Payment Prefs**.
- In the **Credit Cards (Merchant Account)** section, select the **Require ship-to phone number during checkout** check box.
- Click the **Submit** button.

ProStores calculates UPS rates using the following assumptions and rules:

- The packaging material is supplied by the shipper (such as a Customer Supplied Package).
- Commercial rates are calculated if the customer supplies a company name. Otherwise, the higher residential rates are applied.
- "Packing Algorithm" must be selected as the **Quote Basis**, and all products must contain weight and dimension values (Length, Width, Height) if you want UPS to determine if a) Dimensional Weight should be used, or b) if the package meets an Oversize 1 (OS1) or Oversize 2 (OS2) condition.
- Additional service fees are excluded (such as Saturday Delivery, Verbal Confirmation, etc.). You may use the "Shipping Mark-Up" field or the product "Shipping" field to apply these fees.

To learn more about the UPS Online® Tools, please visit http://www.ec.ups.com.

United States Postal Service Shipper

Advanced Mode
This option is only available if it has been enabled by your Site Administrator

United States Postal Service (USPS) allows you to utilize the shipping calculations and services developed by United States Postal Service.

To set up United States Postal Service:

Basic Configuration (Allows you to receive shipping rates from the USPS):

1. Browse to **Store | Shipping Prefs**. The Shipping Preferences page appears.
2. Select United States Postal Service from the **Active Shipper** list. The page will be updated with the information needed to configure United States Postal Service shipping.
3. **Pickup Postal Code**. Enter the zip code of the post office where you will be mailing. This does not have be the same as your store's zip code.
4. **Domestic Delivery Methods:** Check all the domestic Shipping Methods you want to make available to your customers. Note that if you choose to offer Bound Printed Material, Library Mail and/or Media Mail customers will be provided with these options for all purchases. This requires All your shippable products to qualify for these rates. Please refer to U.S. Postal Service guidelines for more information on restrictions for these classes.
5. **Allow Shipments to** Check all countries your store supports. Domestic shipments are always available.
6. International Delivery Methods Check all international Shipping Methods your store supports.

Shipping Label Settings:

Printing Shipping Labels requires Adobe Acrobat Reader or a similar program allowing the display of .pdf files within your browser. If you have enabled PayPal for your store, clicking the **Print USPS label** link on the **Orders Ready for Shipping** page opens PayPal for printing a postage-paid label. If you have not enabled PayPal for your store, labels printed by the system do not contain postage.

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1. **Provide customer tracking email:** Check this box if you want the USPS to send an email to your customer on your behalf providing shipment and tracking information.
2. **Label content options:** If you would like only a bar code printed by the label system select Bar Code Only. The default is Full Addressing which prints the bar code along with destination and return addresses.

Express Mail always prints the full address.

---

3. **Print Customer Online Record on a separate page:** Select **Yes** if you want the package label on one sheet and the receipt (Customer Online Record) on the following page.

4 **Print Express Mail Shipping Labels?** Select **Yes** if you offer Express Mail shipping and would like to print Shipping Labels for the service.

If you select **Yes**, then you'll have to read and Accept an agreement regarding Express Mail. To do this, click on the **Submit** button after selecting **Yes**. This will load the agreement. To accept the agreement, click on the **Accept** option and then click on the **Submit** button again.

5 **Allow Express Mail delivery on weekends:** Checking this box allows delivery attempts of Express Mail on Saturday and Sunday.

This is a default value and can be changed for each package when generating Shipping Labels.

6 **Allow Express Mail delivery on holidays:** Checking this box allows delivery attempts of Express Mail on holidays.

This is a default value and can be changed for each package when generating Shipping Labels.

7 **Delivery Signature Waiver:** Checking this box allows the delivery person to verify the delivery without your customer's signature.

This is a default value and can be changed for each package when generating Shipping Labels.

8 Click on the **Submit** button to save your settings.

To ensure accurate rating, be sure to enter dimensions (inches) and weights (pounds) for all products. The USPS Shipper requires these values and will always use pounds as the weight unit and inches as the dimensional unit when calculating the shipping rate. Any fractional weight amounts will be converted to ounces (i.e. .5 lbs = 8 ounces). If ProStores is unable to obtain a rate from the USPS Shipper for any reason, it will use the Merchant-Defined Shipping Tables for rates. To configure your Merchant-Defined Shipping Tables, see Setting Up Merchant-Defined Shipper for more information.

Shipping Containers

Advanced Mode

Shipping Containers are the packages you will use to ship an order. By defining your shipping containers, and then assigning them to products, you can automate the process of printing Shipping Labels.

To define your Shipping Containers:

1 Browse to **Store | Shipping Prefs**. The Shipping Preferences page appears.

2 Select the shipper from the **Active Shipper** list. The page will be updated with the information needed to configure that shipper.

3 Click **Shipping Containers**. The Shipping Containers page appears.

4 To add a Shipping Container:

- Click **Add**. The Shipping Container page appears.
- Select the type of shipping container you wish to add from the **Container** list.
- Enter the dimensions of the shipping container. If this is a tube, enter “0” as the height.
- Click **Submit**. You are returned to the Shipping Containers page.

5 To delete a Shipping Container:

- Select the check box(es) of the shipping container(s) you wish to delete.
- Click **Delete**. The shipping container is removed from the list.

Once you have defined all your shipping containers, you will need to assign them to each product. See *Maintaining Product Profiles* (page 89) for more information.

For more information on shipping containers and how they are packed see *Field Help: Shipping Containers* (page 51) for more information.

Field Help: Shipping Containers

Shipping Container Info

Field	Description
Container	Select the type of shipping container you wish to add from the list. “Box” shipping containers will be packed with as many products as will fit when using a shipping algorithm. “Tube” shipping containers allow one product per tube and fit is determined by length of product vs. length of tube. “Envelope” shipping containers are packed with a single product also and fit is determined by length and width of product vs. envelope. Product dimensions are rounded up to the nearest whole number.
Name	Enter a descriptive name for this shipping container.
Length	Enter the length of this shipping container. For compliance with USPS shipping calculation algorithms, be sure to enter the length of the longest side of the package in the **Length** field. Failure to do so could result in inaccurate shipping fee calculations.
Width	Enter the width of this shipping container.
Height	Enter the height of this shipping container. If the shipping container is a “tube”, enter “0” as the height.
Maximum Weight	Enter the maximum weight this shipping container can hold.

Defining Sales Tax Rates

This page allows you to define sales tax tables that apply to your country and region.

The Sales Tax model generally calls for a flat tax rate for all products. However, many countries define their tax rates based on the type of product being purchased. For example, the standard tax rate in South Africa is a single percentage rate for all products. However, in Switzerland the standard tax rate is at one rate, but certain products are taxed at a different rate (including food, medicine, newspapers, etc.).

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

About Tax Laws and Internet Purchases

Many countries are still developing official positions on how taxes should be levied for purchases made on the Internet. The Internet introduces several complexities related to sales tax calculation, primarily surrounding the physical location of the customer, you, your physical store, your supplier(s), and the server facilitating the purchase. It is not uncommon for all of these locations to be in regions governed by different tax laws and/or tax rates. The challenge is to determine the appropriate tax rate, if any, to apply to each purchase.

It is therefore your responsibility to determine the appropriate tax rate to be used for each purchase. ProStores only matches the customer's location against the sales tax tables you have defined to determine the tax rate to be used.

Maintaining Sales Tax Options

To define your Sales Tax options:

1. Browse to **Store | Sales Tax**. The Sales Tax Preferences page appears.
2. If you wish to include the sales tax when displaying prices in your catalog (appropriate for those countries that do not typically display sales tax separately), select the **Pricing** check box under **Options**. The product price displayed will be based on the default sales tax region, if the customer does not already have a payment address on file.

   If you choose this option, you may want to edit the Invoice and Shipping templates to remove the `<ss:value source="$invoice.tax"/>` tag. This tag displays the sales tax separately from the tax that will already be included in the product price, and could be confusing to your shoppers.

   ---

3. The ProStores tax calculator is the default calculator. However, your Site Administrator may have enabled custom tax calculators for your use. To use another tax calculator, select it from the **Calculator** list. *Advanced Mode*
4. Click **Submit** to make the changes.

How Are Sales Taxes Applied to Products?

When viewing products in the catalog, taxes are applied as follows (only applies if the **Include Tax in Prices** check box is selected):

1 If the customer has logged in to the store (and therefore, their payment address is known), the system checks to see if there is a tax region that matches the customer's payment address and also has the product's tax category assigned to it. If so, that tax rate is applied to the product.

2 If the store is using the Tax Region Select template, and the customer has selected a tax region, the system checks to see if there is a matching tax region that also has the product's tax category assigned to it. If so, that tax rate is applied to the product.

3 If the customer's payment address is unknown, or no tax region has been selected, the system checks to see if there is a default tax region that also has the product's tax category assigned to it. If so, that tax rate is applied to the product.

4 If the product does *not* have a tax category, or if there is not a tax region that also has the product's tax category assigned to it, the rate for the default tax region is applied to the product.

After the customer has entered or confirmed their payment address during the checkout process, taxes are applied to each product as follows:

1 If there is a tax region that matches the customer's payment address and also has the product's tax category assigned to it, that tax rate is applied to the product.

2 If the product does *not* have a tax category, or if there is not a tax region that matches both the customer's payment address *and* the product's tax category, the rate for the tax region matching the customer's payment address is applied to the product.

3 If no tax region matches the customer's payment address, and there is a default tax region that also has the product's tax category assigned to it, that tax rate is applied to the product.

4 If none of the above applies, then the default tax region is used if **Use rate from default tax region** is selected. If that option is not selected, no tax is applied to the product.

The following are examples of tax region tables, and how taxes would be applied using those tables.

Sample tax region table:

Example #	Default?	Country/State/County	Category	Rate
1		US/AZ	n/a	4%
2	X	US/CA	n/a	5%
3		US/CA	CategoryX	6%
4		US/AZ	CategoryX	7%

Examples of how these rates would be applied on checkout (assuming no tax region has been selected):

Customer Payment Address	Product Tax Category	Example # Applied
Arizona, US	None	1

Customer Payment Address	Product Tax Category	Example # Applied
None	None	2
None	CategoryX	3
Arizona, US	CategoryX	4

ProStores Tax Configuration

The following instructions assume that you have already selected the ProStores tax calculator from the **Calculator** list in the sales tax table.

See *How Are Sales Taxes Applied to Products?* (page 53) for more information on how the tax calculator calculates and displays taxes.

To configure the ProStores Calculator:

1. Browse to **Store** | **Sales Tax**. The Sales Tax Preferences page appears.
2. If you wish to use a default tax region to calculate sales tax when the customer's tax region cannot be determined, select the **Checkout** check box under **ProStores Tax Calculator Configuration**. In order to use this option, you must select a default tax region. If you do not select this option and if the customer's geographic information does not match any of the defined tax regions, then no tax will be applied.
3. If you wish to calculate tax based on the shipping address (instead of the payment address), select the **Tax Basis** check box.
4. Click **Apply** to make the changes.

ProStores Sales Tax Regions

Advanced Mode

The narrowest tax region will be applied to the customer. For example, if you have defined a tax region with a county, and that region matches the customer's county, that tax rate will be applied. However, if you do not define a tax region with a county that matches the customer's county, then the region matching the customer's state/province will be applied.

If you will be assigning tax categories to a region, you should define those categories first. See *Sales Tax Categories* (page 56) for more information.

To add a Tax Region:

1. Browse to **Store** | **Sales Tax**. The Sales Tax Preferences page appears.
2. Under ProStores Tax Calculator Configuration, Sales Tax Regions, click **Add**. The Add Sales Tax Region page appears.
3. Enter the information in each field. See *Field Help: Sales Tax Region* (page 55) for more information.
4. Click **Apply** to make the changes.

To delete a Tax Region:

1. Browse to **Store | Sales Tax**. The Sales Tax Preferences page appears.
2. Under ProStores Tax Calculator Configuration, Sales Tax Regions, select the region you wish to remove.
3. Click **Delete**. The region is removed from the table.

To set a Tax Region as the default:

1. Browse to **Store | Sales Tax**. The Sales Tax Preferences page appears.
2. Under ProStores Tax Calculator Configuration, Configuration, ensure that **Use rate from default tax region if region cannot be determined** check box is selected. If not, select it and click **Apply**.
3. Under ProStores Tax Calculator Configuration, Sales Tax Regions, select the region you wish to set as the default.
4. Click **Set Default**. The region is set as the default and now appears in bold.

Field Help: Sales Tax Region

Region Information

Field	Description
Tax Code	The code you wish to assign to this tax region. If you are using StoreSync, enter a code that matches a QuickBooks Sales Tax item with the same code. If you are *not* using StoreSync, enter any unique value.
Country	Select the country from the list.
State/Province	Enter the name of the state or province. This is an optional field. Use the appropriate state/province abbreviation, if applicable for the region. The value entered here will be used to match against the state/province of the customer's payment address.
County	Enter the name of the county, if applicable. This is an optional field. This field will be matched against the county attached to a customer's postal code. The Postal Code table is maintained by the Site Administrator and contains valid postal codes for countries that use postal codes in their addresses. Contact your Site Administrator regarding the maintenance of this table.
City	Enter the name of the city, if applicable. This is an optional field.
District	Enter the name of the district, if applicable. This is an optional field. If you wish to calculate tax based on this field, you will need to add this field to your checkout and registration templates in order to collect it from the shopper.
Piggyback	(Not available for all locales) Select the check box to indicate that PST should be calculated on top of GST.
Tax Category	Select a tax category from the list. This list contains those categories that have already been defined. To add a tax category, click **Add**. See *Sales Tax Categories* (page 56) for more information. This is an optional field.
Rates	Enter each rate, where applicable, in decimal form. For example, enter 0.10 for ten percent.

Sales Tax Categories

Advanced Mode

Tax categories can be used in combination with one or more tax regions and products to form the basis for a tax calculation. Tax categories are typically used in countries that specify different tax rates based on the type of product being sold, or to specify that shipping should be taxed.

To add a Sales Tax category:

1 Browse to **Store | Sales Tax**. The Sales Tax Preferences page appears.

2 At the bottom of the page, click the **Sales Tax Categories** link. The Sales Tax Categories page appears.

3 Under Add Tax Category, enter the category name and click **Submit**. It appears in the **Current Tax Categories** list.

4 Assign the category to a Tax Region, and if necessary, to products as well.

To calculate tax on the shipping amount:

1 Browse to **Store | Sales Tax**. The Sales Tax Preferences page appears.

2 At the bottom of the page, click the **Sales Tax Categories** link. The Sales Tax Categories page appears.

3 In the Current Tax Categories list, select the check box for the tax category you wish to update, and click **Set Taxable Shipping**. The tax category will appear in bold.

4 Assign the category to a Tax Region.

If you want to apply tax to both the shipping amount and products for a particular tax region, you will have to create two separate Tax Regions. One with the Tax Category defined above and the other without.

To remove a tax category:

1 Browse to **Store | Sales Tax**. The Sales Tax Preferences page appears.

2 In the Current Tax Categories list, select the category you wish to remove.

3 Click **Delete**. The category is removed from the list.

CyberSource Tax Calculator Configuration

Advanced Mode
This option is only available if it has been enabled by your Site Administrator

The CyberSource Tax Calculator calculates U.S. sales and use taxes, Canadian Provincial Sales Tax (PST) and Goods and Services Tax (GST), or international Value Added Tax (VAT) for any order.

The CyberSource Tax Calculator must be enabled by your Site Administrator. Please see your Site Administrator for more information.

To configure the CyberSource Tax Calculator:

1 Browse to **Store | Sales Tax**. The Sales Tax Preferences page appears.
2 Under **Options**, select CyberSource from the **Calculator** list and click **Submit**. The CyberSource Tax Calculator section appears.
3 If you haven't already uploaded your CyberSource files (either when setting up the CyberSource payment processor, or when configuring the tax calculator), upload the files by clicking **Upload**.
4 Enter the information in each field. See *Field Help: CyberSource Sales Tax* (page 57) for more information.
5 Click **Submit** to make the changes.

Field Help: CyberSource Sales Tax

Configuration Information

Enter the information provided to you by CyberSource.

Upload Files

If you haven't already uploaded your CyberSource files (either when setting up the CyberSource payment processor, or when configuring the tax calculator), upload the files by clicking **Browse**. Once the file name is entered, click **Submit**.

Select Files

These lists will be empty until you upload the files provided to you by CyberSource (see above). After uploading those files, you can select the appropriate files from the list.

Optional Configuration Information

Field	Description
VAT Seller Registration Number	If you are making international tax requests, enter your VAT Seller Registration Number here.
Nexus	Enter the list of states or provinces where merchandise is taxable, using the two character abbreviation separated by commas. Do not use if **No Nexus** is used.
No Nexus	Enter the list of states or provinces where merchandise is not taxable, using the two character abbreviation separated by commas. Do not use if **Nexus** is used.
Use Ship-To address to calculate tax:	If you wish to use the ship to address for tax calculation, instead of using the bill to address, select this check box.

Tax Categories

Select the tax categories you will be supporting in your store.

Managing Users

Advanced Mode

You can set your permissions for each area of Store Administration using this feature. This was designed to provide increased security to the sensitive areas within the administration area, while still taking advantage of the separate managers working together.

This option is only available if it has been enabled by your Site Administrator

To add a user:

1. Browse to **Store** | **Users**. The Users page appears.
2. Click **Add**. The Add User page appears.
3. Enter the user name, password and confirm the password.
4. Click **Submit**. The User Privileges page appears.
5. Select the areas to which this user will have access.
6. Click **Submit** to add the user. It will appear in the **Current Users** list.

To update a user:

1. Browse to **Store** | **Users**. The Users page appears.
2. Click the user's name. The Edit User page appears.
3. Edit the user name, password and confirm the password. The password will only be changed if you enter the information in both password fields.
4. Under **Privileges**. The User Privileges page appears.
5. Select the areas to which this user will have access.
6. Click **Submit** to add the user. It will appear in the **Current Users** list.

To delete users:

1. Browse to **Store** | **Users**. The Users page appears.
2. Select the user's check box.
3. Click **Delete**.

You cannot delete the user that is currently logged on (yourself).

You have the option of disabling a user. This prevents the user from accessing the system, but retains their information so that they may be enabled later. To enable or disable users:

1. Browse to **Store** | **Users**. The Users page appears.
2. Select the user's check box.
3. Click **Disable**. The user no longer has access to the system.
4. Click **Enable** to restore the user's access to the system.

Understanding Modules and Their Relationships

ProStores Store Administration was designed taking into consideration the security needs of your online store. The following should be considered when setting up users.

- The system was designed with the assumption that the person responsible for processing and approving orders would also need access to customer information. For that reason, there are links within the Order Manager area that take the user directly to the Customer Manager area. If you do not set your permissions so that users with access to the Order Manager area have access to the Customer Manager area, the links will not work. An example of this functional crossover would be when the order manager needs to enter a phone-in credit card number to the Customer Profile.
- The Shipping Manager area is designed to work without needing access to any of the other managers. For example, if you outsource the shipping feature, warehouse personnel could have access only to the Shipping Manager area to mark orders shipped. From the Shipping Manager area they would not have access to any pricing or customer information (other than the shipping address).
- Users with access to the Store Manager area module will be able to edit their own user privileges.

Creating a Members-Only Area

(Advanced Edition only) Advanced Mode

You can set up an area of your store that is accessible only to those customers who have registered with your store. This can be useful if you want to offer select products or customize the display of key pages to registered customers. There are two types of members only areas - one that only requires customer registration, and one that requires the purchase of a store subscription.

Building A Registered Members Area

You can set up an area of your store that is accessible only to those customers who have registered with your store. From the customer's perspective, they can become members either by purchasing a product and completing the checkout process, or by registering with your store. Then, the next time they visit your store and log in, they will have access to the members-only features and products.

To set up a members-only area that will be available to all registered customers:

1. Browse to **Store** | **Product Preferences**. The Product Preferences page appears.
2. Select the **Enable Members Only Area** check box.
3. Click **Submit**.
4. If you are using a theme that was shipped with ProStores, the members-only logon link will appear automatically. If not, or if that code has been removed, you will need

to add the code below to a prominent template (like the Header, Footer or Storefront templates).

5 Edit the Catalog Detail - Members Only, Catalog List - Members Only, and/or the Catalog Search - Members Only templates to display unique information to your registered customers.

6 If you wish to only display certain products to your registered members:

 - In the Product Manager | Categories area, add or edit categories, selecting the **Members Only** option.
 - Assign those categories to products using the Product Manager.

```
<ss:if test="$store.isFeatureEnabled('ShowMembersOnlyLink')">
  <ss:link source="$templateSet.searchMembersOnly">
    Members Only Catalog
  </ss:link>
</ss:if>
```

Setting Up a Store Subscription

ProStores allows you to set up a members-only area that requires customers to purchase a subscription to that area. The subscription can be set to expire after a certain period of time.

To set up a subscription membership area:

1 Create the subscription product, making note of the product number. See *Setting Up Subscription Products* (page 108) for more information.

2 Browse to **Store** | **Product Prefs**. The Product Preferences page appears.

3 Select the **Enable Members Only Area** and **Require Subscription Product to Enter** check boxes, and then enter the product number of the product you defined as the store subscription.

4 Click **Submit**.

5 If you are using a theme that was shipped with ProStores, the members-only logon link will appear automatically. If not, or if that code has been removed, you will need to add the code below to a prominent template (like the Header, Footer or Storefront templates).

```
<ss:if test="$store.isFeatureEnabled('ShowStoreSubscriptionLink')">
  <ss:link source="$templateSet.subscribe">Become a Member</ss:link>
</ss:if>
```

From the customer perspective, the subscription process involves purchasing the subscription product, then checking out as with any other product. Once they have completed checking out, they can manage their subscription from the Customer Service area, based on the options you selected on the Product Preferences page. In addition, they are now members of the store and have access to the members-only templates and categories.

See *Setting Up Subscription Products* (page 108) for information on setting up other subscription products.

Sharing Information with QuickBooks

Advanced Mode

If you are a QuickBooks user, you can synchronize data between QuickBooks and your ProStores store using StoreSync. StoreSync works with QuickBooks Pro, Premier Enterprise, and Canadian editions.

If you are using QuickBooks Online Edition, you can synchronize your data from the ProStores toolbar. If you are using another valid edition, please see *StoreSync Utility* (page 165).

With StoreSync, you can:

- Copy customer information from QuickBooks to ProStores, or vice-versa.
- Copy product items from QuickBooks to ProStores.
- Copy ProStores invoices to QuickBooks sales receipts.

Setting Up StoreSync

Advanced Mode

The first step in working with StoreSync is to set up the integration between StoreSync and QuickBooks Online.

To set up your QuickBooks Online Edition integration:

1. Browse to **Store Manager | StoreSync Setup**. The QuickBooks Integration Setup page appears.
2. In the bulleted list, click the **QuickBooks Online Edition** link. The QuickBooks Online - Connection Key page appears.
3. Click the **Connection Setup Interview** link. A new window appears, taking you to the QuickBooks Connection Setup Interview. Follow the instructions online.
4. When you receive your QuickBooks connection key, copy it, and close the new window.
5. Back on the QuickBooks Online - Connection Key page in ProStores, paste the connection key into the field.
6. Click **Next**. The QuickBooks Online - Login Required page appears.
7. Click the **Login to QuickBooks Online** link. A new window appears, taking you to the QuickBooks Online Login page.
8. Enter your QuickBooks Online user name and password, and click **Login**. A page appears, with your Login Key. Copy the Login Key, and click **Finished**. The new window closes.
9. Back on the Login to QuickBooks Online page in ProStores, paste the Login Key into the field.

10 Click **Submit**. The StoreSync Preferences - QuickBooks Online Integration page appears.

11 Enter the information in each field. See *Field Help: StoreSync Preferences* (page 62) for more information.

12 Click **Submit** to save your work.

Once you have set up your QuickBooks Online Edition integration, a StoreSync button appears on the Toolbar.

Now that you have completed the setup, you can synchronize your data. See *Synchronizing Data* (page 63) for more information.

Once you have set up your QuickBooks Online Edition integration, you can modify your settings. To do so:

1 Browse to **Store Manager | StoreSync Setup**. The StoreSync Preferences - QuickBooks Online Integration page appears.

2 Enter or edit the information in each field. See *Field Help: StoreSync Preferences* (page 62) for more information.

3 Click **Submit** to save your work

Field Help: StoreSync Preferences

Invoice Sync Options

Field	Description
Deposit To Account	Select from the list the QuickBooks account to which you wish to have funds deposited when sales receipts are added to QuickBooks. The default selection is "Undeposited Funds". If the connection to QuickBooks does not allow access to your account list in QuickBooks, you must enter the name of the account instead.
Sales Tax, Shipping, Promotions Items	QuickBooks Online currently does not allow sales tax, shipping, or promotions (discounts) to be specified when sales receipts are created. However, you can still get these amounts to synchronize as separate line items on the sales receipt by first creating a product/service item for sales tax, shipping, and/or promotions in QuickBooks and then select those items here. Be sure to associate the appropriate QuickBooks account with each item in QuickBooks so the amounts for each item type are tracked properly. For example, if you create a product/service item for "Online Shipping Charges", you may want to associate it with the "Shipping Income" account.

Sync Control

Selecting any of these options will significantly impact the manner in which StoreSync operates.

Field	Description
Sync Links	Previously synchronized items in QuickBooks Online are linked to items

Field	Description
	in ProStores. To resynchronize all of your data from scratch or if you have purged any customers or products, select this check box.
	No items will be deleted from either QuickBooks Online or ProStores.
Connection	Select this check box to reconnect to QuickBooks Online. Your synchronization links and any previously synchronized data will not be changed.
Integration	Select this check box to remove **all** synchronization links and the connection between QuickBooks Online and your store. It will be as though you never enabled StoreSync in ProStores.

Synchronizing Data

Advanced Mode

For a detailed listing of the fields that are synchronized between QuickBooks and ProStores, see *Data Conversion Tables* (page 64).

To synchronize your data between QuickBooks Online and ProStores:

1. Click the **StoreSync** button on the toolbar. The QuickBooks Online - Login Required page appears.

   This button will only appear if you have already configured ProStores to work with QuickBooks Online before you can synchronize data. See *Setting Up StoreSync* (page 61) for more information.

2. Click the **Login to QuickBooks Online** link. A new window appears, taking you to the QuickBooks Online Login page.
3. Enter your QuickBooks Online user name and password, and click **Login**. A page appears, with your Login Key. Copy the Login Key, and click **Finished**. The new window closes.
4. Back on the Login to QuickBooks Online page, paste the Login Key into the field.
5. Click **Submit**. The StoreSync Data Transfer page appears, with the information to be transferred from QuickBooks Online into ProStores.
6. Review the data in each section, and indicate the action you want to perform by selecting a **Sync Action**. The default action is already selected.
7. When done reviewing the data, click **Submit**. The information is synchronized between QuickBooks and ProStores.

If you have purged any customers or products, you will need to select the **Reset Sync Links** check box on the StoreSync Setup Preferences - QuickBooks Online Integration page. See *Setting Up StoreSync* (page 61) for more information.

Data Conversion Tables

Advanced Mode

This section lists all fields that can be synchronized between ProStores and QuickBooks Online.

Customer

ProStores Customer Profile Field	QuickBooks Customer Field
City	Payment Address City
Company	Company Name
Country	Payment Address Country
Email	Email
Fax - Home	Fax
First Name	First Name
Last Name	Last Name
Mobile	Mobile
Pager	Pager
Phone - Home	Phone
Phone - Work	Alternate Phone
Street	Payment Address Addr1
Street 2	Payment Address Addr2
State	Payment Address State
Postal Code	Payment Address PostalCode
Resale Number	Resale Number

Product

ProStores Product Profile Field	QuickBooks Item Inventory Field
Product	Item Name/Number
Description	Purchase Description
Sell Price	Sales Price

Invoice

ProStores Invoice Field	QuickBooks Sales Receipts Field
Invoice Number	Sale Number
Customer Name	Customer: Job
Payment Address - Street	Payment Address - Address 1
Payment Address - Street2	Payment Address - Address 2
Payment Address - City	Payment Address - City
Payment Address - State	Payment Address - State
Payment Address - Postal Code	Payment Address - PostalCode
Payment Address - Country	Payment Address - Country
Shipping Address - Street	Shipping Address - Address 1
Shipping Address - Street2	Shipping Address - Address 2

ProStores Invoice Field	QuickBooks Sales Receipts Field
Shipping Address - City	Shipping Address - City
Shipping Address - State	Shipping Address - State
Shipping Address - Postal Code	Shipping Address - PostalCode
Shipping Address - Country	Shipping Address - Country
Order Date	Date
Payment Method	Payment Method
Ship Date	Ship Date
Description	Item
Qty	Qty
Total	Amount

Chapter 4: Managing Sales, Promotions and Marketing

One method of encouraging purchases is to offer sales and other promotions to your customers. For example, you can advertise a special discount (in a magazine, direct mail piece, radio, etc.) with a promotion code, and those customers who enter the correct code (supplied by you) will receive a predefined discount off the entire order.

ProStores uses rules (defined by you) to determine when to apply promotions, and allows for both storewide and product level promotions.

Using Promotions

The following are examples of how you might use promotions:

Advertising

- You advertise a special discount (in a magazine, direct mail piece, radio, etc.) with a promotion code.
- Those customers who enter the correct code (supplied by you) will receive a predefined discount off the entire order (excluding special services, such as monogramming, engraving or gift wrapping).

Use unique codes for different media or geographic regions and track the success of your campaigns. Multiple special promotions can run concurrently.

Gift Certificates

Overview
To create a gift certificate, simply create a product for the gift certificate (for example, create a product named "Gift Certificate" with a price of $25.00).

Create and Use a Gift Certificate

Create a gift certificate:

- In Store Administration, navigate to the Available Store Promotions page at **Store | Promotions | Available**.
- Click the **Order Minimum/Maximum** link. The Order Minimum/Maximum Configuration page opens.
- Enter an appropriate **Promotion Name** and **Promotion Code**.
- To make the gift certificate immediately available, select the **Active?** check box. You can also activate or deactivate the gift certificate as needed in the Inactive and Active Store Promotions pages.

- Enter optional **Invoice Text** to display a message related to the gift certificate on the customer's invoice.
- Enter the gift certificate amount in **both** the **Discount Amount** and **Order Minimum** fields.
- Select the **Flat amount off** Discount Type.
- Select the **Limit use to once per customer** check box.
- Click the **Submit** button.

Use a gift certificate:

- Create the gift certificate using the steps above.
- When a customer purchases this gift certificate, you or the customer provides the recipient with the promotion code.
- When shopping at your store, the recipient enters the promotion code during checkout.

Applying Promotions

With ProStores, you can create multiple promotions for your customers to use. However, ProStores uses rules (defined by you) to determine which promotions to apply, and the order in which to apply them.

ProStores uses the following information to determine which promotional price to apply to a product (this only applies to promotions that don't require promotion codes):

1. If there are both store and product promotions active in the store, ProStores checks to see if store or product promotions should be applied first. This is defined on the **Store** | **Promotions** page. The default setting is to apply store promotions first.
2. If there are multiple active store/product promotions, ProStores checks the ranking of the promotions, and applies promotions in that order. Promotion rank is defined on the **Store** | **Promotions** | **Available** and **Product** | **Promotions** | **Available** pages.
3. Each promotion is then checked in order to see if the product and customer meet the promotion criteria (including valid dates, exclusivity, etc.). The **first** to meet the criteria is applied to the product price.
4. If the customer enters a valid promotion code during checkout, that promotion is applied to the entire order (as a separate line item), in addition to any other valid, non-coded promotions.

Maintaining Storewide Promotions

(Advanced Edition only)

Storewide promotions are discounts that are applied across all products in a store (unless a product is specifically excluded). The Promotions feature allows you to enable storewide sales and define gift wrap options.

To make general promotion settings:

1. Browse to **Store** | **Promotions**. The Promotions page appears.
2. Under **Basic Information**, indicate if store or product promotions should be applied first. See *Applying Promotions* (page 67) for more information.
3. To allow Gift Shipments, select the **Allow Gift Shipments** check box.
4. To offer a gift wrap service, select the **Enable gift wrapping service** check box and enter a price for the service (if applicable). This step is required if you want to create any Gift Wrap promotions.

   You can offer different types of gift wrap services by defining a promotion for each.

To configure a storewide promotion:

1. Browse to **Store** | **Promotions** | **Available**. The Available Store Promotions page appears.
2. Select the type of promotion you wish to configure by clicking the link.

   Descriptions of each promotion are available in the Online Guide.

3. Enter the information in the **Basic Information** section. See *Field Help: Promotion Setup* (page 69) for more information.
4. Enter the information in the **Detailed Information** section. Refer to the online Field Help for more information.
5. Click **Submit**.

You cannot update a promotion once it has been used in an order.

If there are multiple active promotions for a store, ProStores will apply them in the order in which you have ranked them. By default, promotions are ranked in the order in which they are created.

To change the ranking of store promotions:

1. Browse to **Store** | **Promotions** | **Configured**. The Available Store Promotions page appears, listing active promotions in the order in which they are ranked.
2. To move a promotion down in the ranking, click .
3. To move a promotion up in the ranking, click .

To make a promotion inactive:

1. Browse to **Store** | **Promotions** | **Configured**. The Available Store Promotions page appears, listing active promotions.
2. Select the promotion(s) you wish to inactivate and click **Deactivate**.

Field Help: Promotion Setup

Basic Information

Field	Description
Promotion Hierarchy	Indicate which type of promotion should be applied first. Note - even if you indicate that store promotions should be applied first, some store promotions require that the full invoice be completed before the promotion is applied (promotions that require a certain quantity of items, total value of the cart, etc.). In these cases, the product promotions will be applied first.

Gifts and Wrapping

Field	Description
Gift shipments	Indicate if you would like to offer gift shipments. This allows the customer to send items purchased as gifts. They will be prompted for a separate ship-to address and a personal message to be included with the gift when checking out.
Gift Wrap	Select this check box if you would like to offer gift wrapping service. If the consumer chooses gift wrapping, a line item for gift wrap will be added to the invoice, multiplying the gift-wrap fee by the number of line items on the invoice. To offer multiple gift wrap options, create a promotion for each type of gift wrap service you wish to offer.
Gift Wrap Price	Enter the price you will charge for the gift wrap service.

Placing Individual Products on Sale

Product promotions are discounts that are applied to individual products. You may have up to 100 active promotions per product.

To define storewide promotions, see *Maintaining Storewide Promotions* (page 68) for more information.

To configure a product promotion:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the 

button for the product to which you wish to configure promotions. The Promotion Information page appears.
3. Select the type of promotion you wish to apply by clicking the link in the **Available Promotions** section.

   Descriptions of each promotion are available in the Online Guide.

4. Enter the information in the **Basic Information** section. See *Field Help: Promotion Setup* (page 69) for more information.
5. Enter the information in the **Detailed Information** section. Refer to the online Field Help for more information (by clicking).
6. Click **Submit**.

(Advanced Edition only)

To configure a product *attribute* promotion:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the attrib button for the product for which you wish to configure promotions at the attribute level. The Product Attributes page appears.
3. Under **Current Attributes**, select the link of the attribute to which you wish to assign a promotion. The Product Attributes Update page appears.
4. Click **Promotions**. The Promotion Information page appears.
5. Select the type of promotion you wish to apply by clicking the link in the **Available Promotions** section.

   Descriptions of each promotion are available in the Online Guide.

6. Enter the information in the **Basic Information** section. See *Field Help: Promotion Setup* (page 69) for more information.
7. Enter the information in the **Detailed Information** section. Refer to the online Field Help for more information.
8. Click **Submit**. You are returned to the Promotion Information page.

If there are multiple active promotions for a product, ProStores will apply them in the order in which you have ranked them. By default, promotions are ranked in the order in which they are created.

To change the ranking of product promotions:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the promo button for the product whose promotions you wish to rank. The Promotion Information page appears, listing promotions in the order in which they are ranked in the **Active Promotions** section.
3. To move a promotion down in the ranking, click .
4. To move a promotion up in the ranking, click ↑.

To make a promotion inactive:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Click the promo button for the product whose promotions you wish to inactivate. The Promotion Information page appears.

3 In the **Active Promotions** section, select the promotion(s) you wish to inactivate and click **Deactivate**.

Email Marketing

ProStores makes it easier to communicate with your customers and prospective customers with email marketing campaigns that you create.

The only email marketing services that will be available to you are those that have been enabled by your site administrator. If you're not seeing any email marketing services, contact your site administrator.

Getting Started

To begin working with email marketing services:

1. Browse to **Store** | **Email Marketing**. The Email Marketing Configuration page appears.
2. Select from the list of active email marketing services that are available on your installation.
3. Register at the email marketing service with which you wish to work by clicking its link.
4. Once you've registered, enter the User Name and Password into ProStores and click **Save Registration**.
5. Configure the email marketing features to meet your needs.

Chapter 5: Building the Product Catalog

The product catalog is the place where all product information is stored, including product profiles, manufacturers and categories.

This chapter will provide you with an overview of how the product catalog is built, and detailed instructions for building your catalog.

This chapter does not cover managing product inventory. See *Managing Inventory* (page 124) for more information.

Understanding the Product Catalog

The product catalog is made up of several different pieces, including:

- Individual product profiles.
- Product categories, which group the products.
- Manufacturers, who make the product.
- Suppliers, who provide the product. *(Advanced edition only)*
- Individual product attributes, which allow you to track inventory for specific product attributes such as size or color. *(Advanced edition only)*
- Serialized inventory records, where you can assign serial numbers to each piece of inventory, allowing you to track the exact piece you have sold. *(Advanced edition only) Advanced Mode*

Some of the pieces of the product catalog.

How to Set Up Your Product Catalog

To add product information for the first time:

1. In **Product | Suppliers**, enter all supplier information. See *Maintaining Supplier Profiles* (page 149) for more information. *(Advanced Edition only)*
2. In **Product | Custom**, set up your Custom Fields. See *Defining Custom Product Fields* (page 86) for more information. *(Advanced Edition only)*
3. In **Product | Categories**, set up your categories. See *Maintaining Categories* (page 75) for more information.
4. In **Product | Manufacturers**, enter all manufacturer information. See *Defining Manufacturers* (page 84) for more information.
5. In the **Product Manager**, enter all product information. See *Maintaining Product Profiles* (page 89) for more information.

How do Customers Find Products?

Once your product catalog is created and your store is open, customers can search for products. Following is information about how your customers can search for products, and settings you can change to improve their searches.

Search Length Settings

In Store Manager | General Preferences, under **Search and Cart Options**, set the **Min. Length** to any number greater than zero. This will ensure that if a customer types in a single letter, the search will return all matches that start with that character.

Setting Search Options in Templates

By default, ProStores ships the Catalog (Search) templates with the option of controlling a search with And/Or criteria. If that option does not exist in your store, add the following code to the **Catalog** template:

```
<input type='radio' name='keywordoption' value='AND' checked>And
<input type='radio' name='keywordoption' value='OR'>Or
```

Searching on Custom Fields

Product Custom Fields one through four can contain information used to search for a product. To allow customers to search for products using these fields, add the following code to the Catalog template (where # is from 1-4). See *Defining Custom Product Fields* (page 86) for more information.

```
<ss:edit name='custom#' source="$catalog.custom#" size="30"/>
```

Defining Supporting Product Information

Before adding products to your catalog, you should set up information that you will use when working with products, including categories, manufacturers, custom fields, etc. This section discusses those tasks.

Working with Categories

Categories are essential to the organization of your product catalog because they assist your customers in finding your products. The first step in creating your product catalog is to define the categories in which the products will be placed.

If you import products that have category assignments in the import file, those categories will be defined as the file is imported. However, only the category name will be defined - the description, photo, and other information will need to be added manually.

Viewing Categories

To view a list of categories:

- Browse to **Product | Categories | List**. A list of all categories will be displayed.

Or...

1 Browse to **Product | Categories**. The Categories page appears.

2 Under **Search Options**, in the **Categories** field, type the starting characters of the category's name and click .

To list all categories, click without entering any characters.

3 A list matching your search criteria appears.

You can also indicate how many levels of subcategories you wish to have displayed on your storefront. The default is to display all levels.

To change the number of subcategories displayed:

1 Browse to **Product | Categories**. The Categories page appears.

2 Under **Category Level Display Options**, indicate the number of subcategories you would like to display.

3 Click **Submit**. The storefront will now display the specified levels of categories.

These settings only affect the use of the $catalog.categoryList member (which is used on the store's header/footer template by default). Any other members that display categories are not affected. Because changes to these settings will affect how categories are displayed on your storefront, it is recommended that you review your storefront after making any changes.

Maintaining Categories

To add a category:

1 Browse to **Product | Categories | Add**. The Add Category page appears.

2 Enter the category information. See *Field Help: Categories* (page 76) for more information.

Because ProStores inserts a colon (":") to separate the category name and the name of its related subcategory, you may want to avoid using a colon in the category name.

3 Click the **Submit** button to save the category and return to the Category Information page.

To add a subcategory to a category or subcategory:

1 Browse to **Product | Categories | List**. The Categories page appears, displaying a list of categories and subcategories.

2 Click the link for the category or subcategory for which you wish to add a subcategory.

If you click on a category link, the Category Information appears; if you click on a subcategory link, the Subcategory Information page appears. Both page types use the same steps to add a subcategory.

3 Click the **Subcategories** button.

4 Under **Add Subcategory**, enter the name and sort priority of the subcategory.

5 To add this subcategory to the list of featured categories, select the **Make this a featured category for my store** check box.

6 Click the **Submit** button to save the subcategory and return to the Category (or Subcategory) Information page. The subcategory will appear in the Subcategories list.

7 Repeat for each additional subcategory.

To update a category or subcategory:

1 Browse to **Product | Categories | List**. The Categories page appears. See *Viewing Categories* (page 74) for more information.

2 Click the link for the category or subcategory you wish to update.

> If you click on a category link, the Category Information appears; if you click on a subcategory link, the Subcategory Information page appears. Both page types use the same steps to update.

3 Click the **Update** button. The Category (or Subcategory) Update page appears.

4 Edit the information in each field.

> For detailed information about the Category fields, see *Field Help: Categories* (page 76); for detailed information about the Subcategory fields, see *Field Help: Subcategories* (page 78).

5 Click the **Submit** button to save your changes and return to the Category (or Subcategory) Information page.

To delete a category or subcategory:

1 Browse to **Product | Categories | List**. The Categories page appears.

2 Select the check box for each category or subcategory you wish to delete.

> USE WITH CAUTION! ProStores does not request confirmation of the deletion or a way to undo the deletion.

3 Click the **Delete** button to delete the selections, or click the **Reset** button to clear all check boxes.

Field Help: Categories

Basic Information

Field	Description
Category	Enter the name of the category. Any text entered here will be displayed on your search results page, if you've chosen a layout that displays category information.
Description	Enter a description for the category. Any text entered here will be displayed on your search results page, if you've chosen a layout that

Field	Description
	displays category information.
Photo	Enter the filename for the image used to represent the category on the Catalog List page. Any image entered here will be displayed on your search results page, depending on the layout you've selected. To use an image that has already been uploaded, select it from the **Existing** list (if you have more than 500 product images, the drop-down list will not appear - enter the file name instead). To upload an image, click **Browse** and browse to the image file. To remove a reference to an image, select *None* from the **Existing** list. See *Uploading Images* (page 18) for more information.
Sort Priority	Use this field to control how search results will be sorted in your store. Enter a number between 1 and 9999 to indicate the category order in which you want products sorted. For example, if you give Category A a sort priority of 2, and Category B a sort priority of 1, then products assigned to Category B will be displayed before products assigned to Category A. This feature requires that the Catalog List template be sorted by "categorypriority".
Featured Category	Select this check box to add this category to the featured categories list for your store. ProStores displays a link to one randomly-selected featured category on your store's home page if your store's template supports featured categories. Each store can have up to five featured categories.
	If you try to designate a sixth featured category, an error message will notify you that the maximum number of featured categories already exists. Click the **List Featured Categories** link to view and modify the list of featured categories.
	To display the featured category, your Storefront template must contain the following code:
	`<ss:if test="$store.isFeatureEnabled('ShowFeaturedProduct')">...</ss:if>`
	See Working with Template Source Code in the Designer's Reference Guide for more information.
Members-Only	*(Advanced Edition only)* Indicate if a category is available only to members. This option is valid when the Members-Only area is enabled on the Store Manager | Product Preferences page. See *Building A Registered Members Area* (page 59) for more information.
Shopping Comparison Sites	To exclude all products in this category from submission to any shopping comparison site, select the check box. See *Shopping Comparison Sites* (page 118) for more information.

Templates

Field	Description
Header Template	Enter the name of the Header template to be used to display the category on the Catalog List page. This works best when displaying a single category in a catalog list.
List Template	If you have created and imported a custom Category List template and wish to use it to display search results for this category, select it from the list.
Footer Template	Enter the name of the Footer template used to display the category on the Catalog List page. This works best when displaying a single category in a catalog list.

Subcategories

The Subcategories section displays a list of subcategories associated with this category. This section appears in the Category Information page for an existing category; it does not appear in the Add Category page.

Field	Description
Subcategories	Enter the name of the Header template to be used to display the category on the Catalog List page. This works best when displaying a single category in a catalog list.

Field Help: Subcategories

Add Subcategory

Field	Description
Subcategory	Enter the name of the subcategory. Any text entered here will be displayed on your search results page, if you have chosen a layout that displays category information.
Sort Priority	Use this field to control how search results will be sorted in your store. Enter a number between 1 and 999 to indicate the subcategory order in which you want products sorted. For example, if you give Subcategory A a sort priority of 2, and Subcategory B a sort priority of 1, then products assigned to Subcategory B will be displayed before products assigned to Subcategory A.
Featured Category	Select the **Make this a featured category for my store** check box to add this subcategory to your list of featured categories.

Category Map

Once you've entered your categories and subcategories, you can display a listing of the chosen category or categories, the associated subcategories, and the products associated to each category.

To view a full category map:

- Browse to **Product** | **Categories** | **Map**. A map of all categories and assigned products will be displayed.

Working with Shared Attributes

Attributes offer a way for your customers to choose a product according to certain features such as color, size, style, or any other identifiable characteristic. ProStores offers the most flexible and advanced support for adding attributes to product in your inventory.

Maintaining Attributes

ProStores offers advanced flexibility by allowing you to specify attributes for each product in your inventory, and to optionally control product pricing according to attribute settings.

Before covering how to work with attributes, it may help to discuss a few terms first.

Term	Definition
Attribute	An attribute is a value that you can use to describe a product. For example, a shirt could have a `Color` attribute with values such as `red, green, yellow, blue`.
Shared Attribute	A shared attribute is an attribute that you define independently of any product. Each shared attribute is available for every product through the product's **Attribute** section.
Product Attributes	A product attribute is an attribute that you define for a particular product within the product's attribute section.
Attribute Inventory	*(Advanced Edition only)* Attribute inventory is the inventory of a product with one or more attributes set. For example, if you have a 100 shirts that you sell for $10.00, but 25 special "red autographed" shirts that you want to sell for $25.00, you can create a base product called `Shirt`, define attributes for color and autograph, then create inventory based on the color selection `red` and the autograph selection `autographed`.

(Advanced Edition only)

ProStores provides a means for you to create specific product inventory from a "base product": the Attribute Inventory. The example in this section demonstrates how to use product attribute inventory to manage and control your products.

Example: The Retro@ctive Shirt Store
The Retro@ctive Shirt Store sells shirts. They have 100 basic shirts for sale that come in all sizes, colors, and sizes. These shirts sell for $10.00 each. They also have two special shirts, 25 red short-sleeve shirts that only come in large, and 50 red long-sleeve shirts that come in all sizes. Each of the special shirts sells for a little higher price than the basic shirts because they cost more to make. The Retro@ctive Shirt Store wants to make sure that their customers are charged the correct amount depending on which shirt they put in their carts. Enter attribute inventory.

To make sure that the customer pays the correct amount for each shirt, and that the inventory would accurately reflect purchases, the Retro@ctive Shirt Store administrator would perform the following steps to set up the product attribute inventory:

1. Create a shared attribute called **Size** that has the values `small,medium,large`.
2. Create a shared attribute called **Style** that has the values `long-sleeve,short-sleeve`.

3 Create a shared attribute called **Color** that has the values `red,blue`.

4 Create a shirt Product that reflects the inventory and price of the basic shirts.

5 Add the **Size**, **Style** and **Color** attributes to the basic shirt Product.

6 In the **Attributes** section of the Product Information page for the shirt Product, reorder the attributes so that the `color` is first and the `size` attribute is last. See the **Note** below.

7 Click the **Attributes** button to open the Product Attributes page for the shirt.

8 Configure the first special shirt, the 25 red short-sleeve shirts that only come in large:

- In the **Basic Information** section, select `red` from the **Color** pull-down menu.
- In the **Basic Information** section, select `short-sleeve` from the **Style** pull-down menu.
- In the **Basic Information** section, select `large` from the **Size** pull-down menu.
- In the **Pricing Information** section, enter a **Price** of $15.00.
- In the **Inventory Information** section, enter a **Quantity** of 25.

These 25 shirts are in addition to the 100 basic shirts in inventory, so Retro@ctive has now listed 125 shirts in total inventory.

- Click the **Apply** button. The first special shirt has been added to the attribute inventory, and appears in the **Current Attribute Inventory** section.

9 Configure the second special shirt, the 50 red long-sleeve shirts that come in all sizes:

- In the **Basic Information** section, select `red` from the **Color** pull-down menu.
- In the **Basic Information** section, select `long-sleeve` from the **Style** pull-down menu.
- In the **Basic Information** section, select `All` from the **Size** pull-down menu.
- In the **Pricing Information** section, enter a **Price** of $25.00.
- In the **Inventory Information** section, enter a **Quantity** of 50.

These 50 shirts are in addition to the 100 basic shirts and 25 short-sleeve red shirts in inventory, so Retro@ctive has now listed 175 shirts in total inventory.

- Click the **Apply** button. The second special shirt has been added to the attribute inventory, and appears in the **Current Attribute Inventory** section.

On the shirts Product Detail page of the Retro@ctive Web store, the customer will see:

- Shirts for $10
- Shirts red/short-sleeve/large for $15.00

- Shirts red/long-sleeve for $25.00

Note: The ordering of the attributes is very important! ProStores uses the attributes to determine which product the customer is trying to buy in order to charge the customer and track inventory correctly. Here is how ProStores processes the attributes:

ProStores looks at the attribute with the highest priority and compares it to the customers selection.

- If the selection matches an attribute inventory item, then ProStores repeats for the attribute with the next highest priority.
- If the selection does not match an inventory item, ProStores processes the selection as though it were the base product.

Let's look at a few examples to see how this processing would affect a customer purchasing shirts from Retro@ctive. Each example uses the attribute evaluation priority set in the steps above: **Color**, **Style**, **Size**.

Example 1: The customer selects `red`, `short-sleeve`, `small`.

10 ProStores matches the selection `red` with the highest priority attribute.

11 ProStores matches the selection `short-sleeve` with the next-highest priority attribute.

12 ProStores cannot match the selection `small` with the next-highest priority attribute, because no attribute inventory is specified with this size for the selections `red` and `short-sleeve`.

13 ProStores charges the customer $10.00 and removes 1 from the basic shirt inventory.

Example 2: The customer selects `blue`, `short-sleeve`, `small`.

14 ProStores cannot match the selection `blue` with the highest priority attribute, because no attribute inventory is specified with this color.

15 ProStores charges the customer $10.00 and removes 1 from the basic shirt inventory.

Example 3: The customer selects `red`, `long-sleeve`, `large`.

16 ProStores matches the selection `red` with the highest priority attribute.

17 ProStores matches the selection `long-sleeve` with the next-highest priority attribute.

18 ProStores matches the selection `small` with the next-highest priority attribute value of "All".

19 ProStores charges the customer $25.00 and removes 1 from the "red/long-sleeve" shirt inventory.

Shared Attributes Page

A shared attribute is one that you define independently of any product. Each shared attribute is available for every product through the product page's **Attribute** section.

The Shared Attributes page displays a list of all shared attributes. From here, you can view your shared attributes, change certain attribute values, view how the attribute will appear in your Product Detail page, or delete selected attributes that are not assigned to products.

You can also create custom attributes for a product in the **Attributes** section of a product detail page. Custom attributes do not appear in this list as they only apply to the product for which they were created.

To view a list of the shared attributes:

- Browse to **Product** > **Shared Attributes**. The Shared Attributes page appears, displaying a list of all shared attributes.

The Shared Attributes page lets you see how the attribute values will appear on your Product Detail page. Each attribute is individually controlled.

Select the appropriate **Storefront Display Type** to see how the list of values will appear, as summarized in the table below.

Option	Effect
Pull-down menu	The values appear in the Shared Attributes page as a pull-down menu.
Radio button	The values appear as a list of option buttons.

To add a shared attribute:

1. Browse to **Product** > **Shared Attributes** > **Add**. The Add Shared Attribute page appears.
2. Enter all attribute information. See *Field Help: Shared Attribute* (page 83) for more information.
3. Click the **Submit** button to save the attribute. The Shared Attributes page appears.

The shared attribute is now available for assigning to a product using the add or update feature in Product Manager.

Any changes made to a shared attribute from this page will appear in the product detail page for every product that uses the shared attribute.

If you customize a shared attribute for a particular product in the product's **Attributes** section, the customized attribute will not reflect any changes made to the shared attribute.

There are two ways to update a shared attribute. The first is to make changes to the attribute directly on the Shared Attributes page. This method is useful for quick changes, but does not permit editing the attribute name or values. The second method, selecting an attribute to update, permits editing all attribute contents including name and values.

To update an attribute directly on the Shared Attributes page:

1. Browse to **Product** > **Shared Attributes**. The Shared Attributes page appears.
2. Make any necessary changes in the **Storefront Label** or **Storefront Display Type** column for the attributes you wish to update.

3 Click the **Update** button. The attributes will now reflect your changes.

To update a selected attribute:

1 Browse to **Product** > **Shared Attributes**. The Shared Attributes page appears.

2 Click the name of the attribute that you want to change. The Update Attribute page appears.

3 Make any necessary changes in the attribute fields.

4 Click the **Submit** button. The Shared Attributes page appears, and the selected attribute will now reflect your changes.

To delete one or more shared attributes:

1 Browse to **Product** > **Shared Attributes**. The Shared Attributes page appears.

2 Select the check box for each attribute that you want to delete. The Delete Attributes page appears.

3 Review the list of attributes to make sure you want to delete all of them.

4 Click the **Yes** button to delete the attributes, or click the **No** button to cancel the delete operation and return to the Shared Attributes page.

You cannot delete a shared attribute that is assigned to a product.

If you have many products and need to delete a shared attribute that is assigned to one or more products, perform the following steps:

5 Export your store product table.

6 Open the exported table in a spreadsheet program such as Microsoft Excel.

7 Use the search and replace tool to search the attribute columns of the product records for the name of the attribute you want to delete and replace the name with an empty value, which effectively deletes the references.

> Perform this step with caution! If you use the spreadsheet's "replace all" command, you could accidentally remove text that forms part of the name of other attributes. Consider performing the search and replace with "find next" instead of "replace all".

8 Import the modified product table into ProStores.

9 If all occurrances were deleted, you can now delete the shared attribute.

See Also

- *Exporting Tables* (page 166)

Field Help: Shared Attribute

Shared Attribute Details

The Shared Attribute page lets you add or update an attribute that you can share with multiple products. To use the shared attribute, add it to the product attributes of any product.

Field	Description
Attribute Name (required)	Enter the name for the attribute in this required field. The name, which can consist of up to 50 characters, including letters and numbers, appears in the **Attribute Name** column of the Shared Attributes page. It also appears in the pull-down menue for adding an attribute to a product in the Product Add or Product Information pages. ProStores allows up to 50 shared attributes. If you have created many shared attributes, scrolling through the list in the **Shared Attribute** pull-down menu when adding an attribute to a product can seem cumbersome. To simplify finding a particular attribute in the scrollable pull-down menu, you may want to consider prefixing your **Attribute Name** with a Product keyword. For example, if you have two color attributes, one for shirts and one for pants, and two size attributes, one for shirts and one for pants, you could create attributes named **Shirt-Size**, **Shirt-Color**, **Pants-Size**, and **Pants-Color**. Then, when you scroll down through the **Shared Attribute** list in the Product Manager, the attributes will appear in order, categorized by Product type, in this case "Shirt" and "Pants".
Storefront Label (required)	Enter the storefront label text for the attribute in this required field. The label, which can consist of up to 50 characters, including letters and numbers, appears in the product detail page for the product.
Storefront Display	Select whether you would like the attribute to appear on the storefont as a pull-down menu or as a group of option buttons. In either case, your customer can only select one value.
Attribute Values	Enter the list of values. Separate each value with a comma. For example, an attribute named **`Color`** could have the values `red, green, blue, yellow`.

Defining Manufacturers

ProStores Store Administration allows you to track information regarding your product manufacturers, making it possible for customers to search for products by manufacturer, and for you to track your inventory by manufacturer.

Viewing Manufacturers

To view a list of manufacturers:

- Browse to **Product** | **Manufacturers** | **List**. The Manufacturer's List page appears.

Or...

1. Browse to **Product** | **Manufacturers**. The Manufacturers page appears.
2. Under **Search Options**, in the **Manufacturers** field, type the starting characters of the manufacturer's name and click .

To list all manufacturers, click without entering any characters. The Manufacturer's List page appears.

3 A list matching your search criteria appears.

Maintaining Manufacturers

To add a manufacturer:

1. Browse to **Product** | **Manufacturers** | **Add**. The Add Manufacturer page appears.
2. Enter the information in each field. See *Field Help: Manufacturers* (page 85) for more information.
3. Click **Submit** to save your work.

To update a manufacturer:

1. View a listing of your manufacturers. See *Viewing Manufacturers* (page 84) for more information.
2. Select the manufacturer you wish to update. The Update Manufacturer Profile page appears.
3. Edit the information in each field. See *Field Help: Manufacturers* (page 85) for more information.
4. Click **Submit** to save your work.

To delete a manufacturer:

1. View a listing of your manufacturers. See *Viewing Manufacturers* (page 84) for more information.
2. Select the check boxes of the manufacturer(s) you wish to delete.
3. Click **Delete**. The manufacturers are removed from the list.

Field Help: Manufacturers

Basic Information

Field	Description
Manufacturer	Enter the name of the manufacturer, as you want it to appear in the catalog and/or reports.
URL	Enter either the manufacturer's web site address, or another address containing information regarding the manufacturer.
Logo	Enter the filename of the manufacturer's logo image. The image needs to be uploaded to your store images directory.
Description	Enter a description for this manufacturer.
Template	If you have created and imported a custom Category List template and wish to use it to display search results for this manufacturer, select it from the list.

Listing Products by Manufacturer

To list all products by manufacturer:

1. Browse to **Product** | **Manufacturers**. The Manufacturers page appears.

2 Under **Search Options**, **Products by Manufacturer** field, type the starting characters of the manufacturer's name and click .

To list all products for all manufacturers, click without entering any characters. The Products by Manufacturers List page appears.

- To modify an entry, click the product name.
- To delete a product, select the check box next to it and click **Delete**.
- To add a product, click the **Add Product** link.

Defining Custom Product Fields

(Advanced Edition only) Advanced Mode

You can assign a title to each of the six custom text fields that are associated with each product. These titles will be shown in the product profile, and can also be used in the following areas of the store:

- Fields one through four can contain information used to search for a product. To allow customers to search for products using these fields, add the following code to the Catalog (Search) template (where # is from 1-4).

```
<ss:edit name='custom#' source="$catalog.custom#" size="30"/>
```

- All fields can be used to display information regarding the product, using the following code (where # is from 1-6).

```
<ss:value source="$product.custom#"/>
```

To set up custom product fields:

1 Browse to **Product | Custom Fields**. The Custom Fields page appears.

2 If you want these fields to appear in the storefront (to display product information), select the **Show Custom Fields** check box. This will cause any custom fields that you define to appear on the Catalog Detail template. If they do not appear, enter the code displayed below on that template.

3 Enter titles for each of the custom fields.

4 Click **Submit** to save your work.

```
<ss:if test="$store.isFeatureEnabled('ShowProductCustomFields')">
<table>
  <ss:if test="$store.products.customLabel1">
  <tr>
    <td><ss:value source="$store.products.customLabel1"/>:</td>
    <td><ss:value source="$product.customText1"/></td>
  </tr>
  </ss:if>
  <ss:if test="$store.products.customLabel2">
  <tr>
    <td><ss:value source="$store.products.customLabel2"/>:</td>
    <td><ss:value source="$product.customText2"/></td>
  </tr>
  </ss:if>
  [repeat for each custom field...]
</table>
</ss:if>
```

Defining Suppliers

ProStores Store Administration allows you to track information regarding your product suppliers. See *Managing the Supply Chain* (page 149) for more information regarding setting up and maintaining suppliers

Working with Product Profiles

Once you have set up your categories, manufacturers, suppliers and custom fields, you can start adding products to your catalog. This section covers maintaining profiles, exporting and importing product information, associating categories to products, and advanced product features.

Finding and Viewing Products

To view a list of products:

- Browse to **Product | List**. A list of all products will be displayed.

Or...

1. Browse to **Product**. The Product Manager page appears.
2. Under **Search Options**, enter the first few characters of the product name in the **Product Name** field and click .

   To view all products, click without entering any information in the field.

3. A list matching your search criteria appears.

See *Advanced Product Search* (page 88) for more search options.

You can update product price and other information directly on this list by entering the information in each field and clicking **Update**. However, clicking any other button on this page before clicking **Update** will cancel your changes.

Clicking any of the buttons next to the product name will take you directly to that area to view and modify information. See *Product Button Descriptions* (page 87) for more information.

Product Button Descriptions

The Product List allows quick access to many product maintenance functions using the buttons in the Options column.

Button	Description
Categ	View or update current category/subcategory associations. See *Associating Categories to Products* (page 99) for more information.
Keys	Define product keywords. See *Defining Keywords* (page 100) for more information.

Button	Description
Promo	Define promotions for the product. See *Placing Individual Products on Sale* (page 69) for more information.
Relate	*(Advanced Edition only)* Link this product to other similar or related products. See *Relating Products and Accessories* (page 106) for more information.
Attrib	*(Advanced Edition only)* Track inventory for different sizes and/or colors, create subscriptions, or downloadable products. See *Working with Inventory Attributes* (page 102) for more information.
Serial	*(Advanced Edition only)* View or modify product serial numbers. This option will only appear if you have selected the **Enable Serialized Inventory** option on the Store Manager | Product Preferences page. See *Serializing Product Inventory* (page 127) for more information.
eBay	List products on eBay. See *List items on eBay* (page 110) for more information.

Advanced Product Search

To search for products using fields other than the product name:

1. Browse to **Product Manager | Search**. The Advanced Search page appears.
2. Enter search criteria in one or more fields.

   To find products that *contain* the word you enter (instead of *starting* with the word you enter), type an asterisk before that word. For example, entering "chair" in the **Product Name** field will only return those products whose full name starts with "chair." However, entering "*chair" will return all products containing that word in their name, including "chair" and "rocking chair."

3. Click **Search**. A list matching your search criteria appears.

Specialized Product Listings

(Advanced Edition only)

ProStores provides several specialized product listings that provide you with an overview of your product catalog, including:

Low Inventory: Inventory is low for the products shown, as defined by their threshold values. If the threshold is not set, a product will not appear on this list until the inventory reaches zero. It is also possible for a product to be backordered and not appear on this report. This is due to the fact that if there is not enough product available to fulfill an order, no inventory will be deducted and the order will move to backorder status. Any remaining product will be available to fill new orders.

If you have enabled Buyer Notifications, you can send buyer notifications at this time by clicking **Send Buyer Notifications**. See *Setting Up Buyer Notifications* (page 126) for more information.

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

It is important to note that a product can have quantity in inventory and still be backordered. The system will not reserve existing quantity, but will leave it available to fill other orders. To see a list of all pending orders for a backordered product, click the number in the **Invoices** column.

To view one of these listings:

1. Browse to one of the links listed above, in the Product Manager
2. The listing will appear.

Maintaining Product Profiles

To add product information:

You can also add a product using the Add Product wizard, available on the Product Manager page.

1. Browse to **Product | Add Product**. The Add Product page appears.
2. Enter all product information. See *Field Help: Products* (page 90) for more information.
3. To see how this product will appear in the store, click **Preview**.
4. Click **Submit** to save your work. The Product Information page appears.
5. You must assign this product to a category before it can appear in your store's search results. See *Associating Categories to Products* (page 99) for more information.

To update product information:

You can also add and update products by importing a database or spreadsheet into ProStores. See *Exporting/Importing Product Information* (page 98) for more information.

1. Browse to **Product**. The Product Manager page appears.
2. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
3. Locate the product in the list and click its link. The Product Information page appears.

   See *Product Button Descriptions* (page 87) for more information. You can also access many of these options directly from the Product List by clicking the appropriate button underneath the product link.

4. Click on the **Update** button.
5. Make your changes and click **Submit** to save your work.

To delete a product from the catalog:

You cannot delete products that have pending eBay listings.

---

1 View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Select the product's check box in the Product List.

3 Click **Delete Product**. The product will no longer be available to your customers unless you reenter all the information.

Field Help: Products

Basic Information

Field	Description
Product (required)	Enter the product name as you want it to appear to customers.
SKU/Item No	Enter the SKU or item number you use for the product. The SKU number is an optional field: the system maintains an internal product number that you can use instead of a SKU number.
ISBN	Enter the ISBN (International Standard Book Numbering).
MPN	Enter the manufacturer's product number.
UPC	Enter the UPC code.
OEM	Select the manufacturer's name from the list. This list contains all manufacturers that have been defined in Product, Manufacturers.
Keywords	A list of the user-defined keywords. See *Defining Keywords* (page 100) for information on working with product keywords.
Brief Description	Enter a brief description of the product. Typically, this description is used on the Catalog List template, where multiple products are viewed on a single page (following a search, for example). You may use HTML tags to customize the descriptive text. Do not enter any hard returns (using your keyboard's Enter key) in this field - doing so will cause errors if you export and then import your product data.
Long Description	Enter a more detailed description of the product Typically, this description is used for the Catalog Detail page (where the customer views a single product). You may use HTML tags to customize the descriptive text. However, some shopping comparison sites do now allow this. If you want to use HTML with in your Long description, configure your shopping comparison site to use the Brief description, and do not use any HTML in your brief description. Do not enter any hard returns (using your keyboard's Enter key) in this field - doing so will cause errors if you export and then import your product data.

Field	Description
Condition	Select the condition of the product from the list.
Weight	Enter the shipping weight that is used to calculate shipping charges for the product. This value should be entered if you are going to charge shipping by Total Order Weight. The unit of measure is defined on the Store Manager | General Preferences page.
Length	Enter the length of the product. This value should be entered if you are using a packing algorithm. For compliance with USPS shipping calculation algorithms, be sure to enter the length of the longest side of the package in the **Length** field. Failure to do so could result in inaccurate shipping fee calculations.
Width	Enter the width of the product. This value should be entered if you are using a packing algorithm.
Height	Enter the height of the product. This value should be entered if you are using a packing algorithm.
Container	If you are using a packing algorithm, select the type of container in which this product should be packed. If the item is to be packaged in its own container, select "Self" - the shipping rate will then be calculated using the product's dimensions. Additional information on containers can be found here *Shipping Containers* (page 51)
Thumbnail	The small thumbnail image typically used on the Catalog List page. The file type needs to be either .gif or .jpg, and the file name may not contain spaces. To use an image that has already been uploaded, select it from the **Existing** list (if you have more than 500 product images, the drop-down list will not appear - enter the file name instead). To upload an image, click **Browse** and browse to the image file. To remove a reference to an image, select *None* from the **Existing** list. See *Uploading Images* (page 18) for more information. To automatically generate a thumbnail image from the photo image, refer to the next section.
Photo	A larger product image for the Catalog Detail page. The file type needs to be either .gif or .jpg, and the file name may not contain spaces. To use an image that has already been uploaded, select it from the **Existing** list (if you have more than 500 product images, the drop-down list will not appear - enter the file name instead). To upload an image, click **Browse** and browse to the image file. To remove a reference to an image, select *None* from the **Existing** list.

Field	Description
	To automatically generate a thumbnail from the photo image, select the **Generate thumbnail from product image** check box, then select the size of the thumbnail you wish to generate.
	The resulting thumbnail image will be a .jpg image, which does not support transparency. If your product image is a .gif with a transparent background, the generated thumbnail .jpg will contain a solid color where the .gif was transparent.
	See *Uploading Images* (page 18) for more information.
Template	Select the Catalog Detail template to be used for this product. This is used to display a product differently than the rest of the catalog. Templates are added using the ProStores Store Design.
Product Type	*(Advanced Edition, Sales Manager module only)* Select the product type from the list. The default product type is Normal. If you select Lead, the product will display in the catalog, but will be unavailable for purchase. It will generate a sales lead form instead. See *Managing Leads* (page 199) for more information.
Categories	A list of the categories assigned to this product. See *Maintaining Categories* (page 75) for more information on maintaining category associations.
Display	Select this check box to include the product in the storefront catalog search results. The default setting is to include the product.
Featured Product	Select this check box to add this product to the featured products list for your store. ProStores versions 6.1 and later support multiple featured products. ProStores randomly selects and displays one of your featured products each time a Customer visits your store or refreshes their browser. Each store can have up to five featured products.
	If you try to designate a sixth featured product, an error message will notify you that the maximum number of featured products already exists. Click the **List Featured Products** link to view and modify the list of featured products.
	In order to support random selection and display of featured products, ProStores requires that your storefront template supports multiple featured products. See Working with Template Source Code in the Designer's Reference Guide for more information, or Support Multiple Featured Products and Categories in the Designer's Reference Guide for examples of how to add featured product support to your store.
Media	If this is a book, movie or music, select the check box. Used by some shopping comparison sites to categorize products.
Subscription	*(Advanced Edition only)* Select this check box to make this a "subscription" product (for example, a "fruit of the month" club). If this

Field	Description
	is a subscription to your store, enter this product's number on the Store Manager | Product Preferences page.
Authorization	*(Advanced Edition only)* Select this check box to require the customer to have the corresponding option selected in their profile. Use this to limit the customer's ability to purchase products requiring special authorization, such as controlled substances.
Order Extensions	*(Advanced Edition only)* Select this check box to gather specific customer information that may be required for the purchase of this product. Select the default order extensions template, or select your own custom template for gathering this information. See *Using Order Extensions* (page 108) for more information.

Pricing Information

Field	Description
Sell Price	Enter the standard price you want to charge customers for the product (required).
Retail Price	*(Advanced Edition only)* Enter the retail price of the product. This can be used to display the "Suggested Retail Price" as a comparison to your price.
Surcharge	*(Advanced Edition only)* Enter the surcharge on the product. The surcharge is added to the base price of the product, and is taxable. In addition, enter the **Invoice Text**, which will be displayed on the cart and invoice pages to describe the surcharge.
Shipping	*(Advanced Edition only)* Enter the additional cost of shipping for this product. This will be added to any shipping charge calculated by your shipping tables. **Exclude from Shipping Charges:** select this check box if this product is excluded from shipping charges. This will void any shipping calculations defined on the Store Manager | Shipping Information page.
Sale Information	Select this check box if the product should be excluded from any store promotions. If other products that are eligible for store promotions exist on the invoice, then store promotions will be applied even though this checkbox is selected for this product.
Sales Tax	Select this check box if the product is subject to sales tax. If applicable, select a category from the list. See *Sales Tax Categories* (page 56) for more information.

Inventory Information

Field	Description
Quantity	Enter the quantity of this product you currently have in stock. If you are not tracking inventory for each color and size separately, enter the total quantity for all colors/sizes available for that particular product. Otherwise, enter the quantity of your default product (which should be the first product entered into the size/color option). Or, you may enter 0 in this location, and choose to enter *all* inventory information into the attribute area. *(Advanced Edition only)*

Field	Description
Threshold	*(Advanced Edition only)* Enter the number at which this becomes a low-inventory item. Any item that reaches its threshold will appear in the Low Inventory Items Report, to prompt order or catalog exclusion. The threshold includes the inventory totals of the main product, plus all attributes.
Unit of Measure	*(Advanced Edition only)* Enter the quantity the customer receives if they order one of something. Generally used if your business does not sell products individually (eaches), but requires the customer to order by the case, box, etc.
Cost	*(Advanced Edition only)* Enter what the product cost you to purchase. This information is used when calculating Profit Margin and Cost of Inventory in the Reports Manager.
Supplier	*(Advanced Edition only)* Select the appropriate supplier from the list. Suppliers must first be entered within the Supplier area of the Product Manager.

Attributes

The **Attributes** section displays the attributes that you have assigned to your product and any inventory specified by attribute. Each attribute adds a selectable descriptive element, such as color, size, or any other definable characteristic, to your products. When adding or updating a product, this section also lets you assign up to ten attributes to each product.

Attribute Fields

Each attribute contains the following fields:

Field	Description
Available Attributes	This pull-down menu lets you select one of the shared attributes.
Customize for this product	This check box appears if you have selected an attribute from the **Available Attributes** pull-down menu. Select this check box if you want to customize the selected attribute for this product. Once you customize a shared attribute, it becomes a custom attribute for this product and ceases to be a shared attribute. The original shared attribute still exists, but changes to the original shared attribute will have no effect on the customized version.
Storefront Label	Enter the storefront label text for the attribute in this required field. The label, which can consist of up to 50 characters, including letters and numbers, appears in the product detail page for the product.
Storefront Display	Select whether you would like the attribute to appear on the storefont as a pull-down menu or as a group of option buttons. In either case, your customers can only select one value.
Attribute Values	Enter the list of values for this attribute. Separate each value with a comma. For example, an attribute named **`Color`** could have the values `red, green, blue, yellow`.

Attribute Actions

You can modify the attributes for a product by adding up to ten attributes, updating attributes assigned to the product, or deleting attributes assigned to the product.

To modify (add, update, reorder, delete) the attributes for a product, you must work in one of the following two pages. All subsequent steps in this section use these pages as the assumed starting point. After making all desired changes, click the **Submit** button to save your changes.

- The Add Product page (for a new product).

  The Product Information page (for an existing product) after clicking the **Update** button.

  To update an existing product:

  - Navigate to **Product** > **List**. The Product list page appears.
  - Click the name of the product that you want to update. The Product Information page appears.
  - Click the **Update** button. The fields become editable.

The **Attributes** button on the Product Information page does *not* enable editing of the product's attributes. This button opens a page that lets you specify inventory levels and pricing according to selected values in existing attributes. For example, you would use this feature to specify that you have ten red shirts at $20 each and twenty blue shirts at $15 each for sale in your general inventory of shirts.

Add Attribute

ProStores provides three ways to add an attribute to a Product:

- Select an attribute from the **Available Attributes** pull-down menu:
  - Click the **Add Attribute** button. A **New Attribute** entry appears, and the remaining attributes count (below the **Add Attribute** button) reflects the remaining number of attributes you can add to this product.
  - Select an attribute from the **Available Attributes** pull-down menu. The attribute label changes to display the name of the selected attribute, and the read-only attribute fields display the values as defined in the shared attribute.
- Select an attribute from the **Available Attributes** pull-down menu, and then customize the selected attribute for the Product:
  - Click the **Add Attribute** button. A **New Attribute** entry appears, and the remaining attributes count (below the **Add Attribute** button) reflects the remaining number of attributes you can add to this product.
  - Select an attribute from the **Available Attributes** pull-down menu. The attribute label changes to display the name of the selected attribute, and the attribute fields display the values as defined in the shared attribute.
  - Select the **Customize for this product** check box. The attribute fields become editable.

If you select **Customize for this product**, change the contents of one of the attribute fields, then clear **Customize for this product**, the fields become read-only but do not revert to the orginal shared attribute contents until you click the **Submit** button.

- Make any changes to the attribute fields.

- Create a customized attribute directly in the **Attributes** section:
  - Click the **Add Attribute** button. A **New Attribute** entry appears, and the remaining attributes count (below the **Add Attribute** button) reflects the remaining number of attributes you can add to this product.
  - Enter appropriate information in the attribute fields.

Repeat the above steps if you would like to add more attributes.

Update Attribute
To update an attribute:

- In the **Attributes** section, make any necessary changes to the contents of the attribute fields.

Reorder Attributes
The attribute order tells ProStores the order in which customer selections should be matched to inventory, according to specified attributes. See *Working with Inventory Attributes* (page 102) and *Maintaining Attributes* (page 79) for more information on working with inventory attributes. *(Advanced Edition only)*

To reorder the attributes:

- Click the **Reorder Attributes** button. The Product: Reorder Attributes layer appears.
- Select the attribute that you want to reorder.
- Click the up arrow ( ) to move the attribute to before the attribute immiately

  above the selected attribute, or click the to move the attribute to below the attribute immediately following the selected attribute.
- Repeat until the attributes are in their desired order.
- Click the **Save** button. The layer closes, and the attributes appear in the new order in the Product Information page.

(Advanced Edition only)

Delete Attribute
To delete an attribute:

- Click the **Delete** ( ) button below the name of the attribute that you want to delete. A confirmation dialog box appears.
- Click the **Okay** button.

- Repeat for any other attributes you want to delete.

Deleting a shared attribute from the **Attributes** section removes the shared attribute from the attributes for this product; the action does not delete the attribute from the available shared attributes.

See Also

- *Working with Inventory Attributes* (page 102)
- *Maintaining Attributes* (page 79)
- *Field Help: Shared Attribute* (page 83)
- *Shared Attributes Page* (page 81)

Options

Field	Description
Related Products	*(Advanced Edition only)* A listing of products related to this product. See *Relating Products and Accessories* (page 106) for more information on relating products.
Product Services	*(Advanced Edition only)* These are product services that are collected during the checkout process. For example, if you sell handkerchiefs, you might put "Monogramming" as the Title and your price as the Fee. **Gather Custom Field When Added to Cart:** if you select this check box, the special service can be shown on the Cart Add template (which is displayed on the Catalog Detail page), and the customer can be prompted for input (such as initials, for monogramming). These services are excluded from promotion discounts and storewide sales. See *Defining Product Personalization Options* (page 107) for more information.

Custom Information

Enter up to six custom fields to display with the product. Custom fields are defined in the Product Manager | Custom Fields page. These fields can be used to either display information regarding the product, or can contain information that a customer might use to search for a product. See *Defining Custom Product Fields* (page 86) for more information. *(Advanced Edition only) Advanced Mode*

Search Engine Tuning

This section allows you to control what natural search engines will process, and increase your products' visibility and ranking in internet searches.

Field	Description
Meta Description	Enter the text to be placed in the HTML <meta> description tag on the product detail page. Typically, search engines will display this text with the link when the page appears in a search. Keywords should be used within this text to improve the chances of it being displayed by some search engines that prefer showing text rich in search keyword 'hits.' While including keywords is important, the goal

Field	Description
	should be readability, and to encourage potential customers to click your link. Being brief is to your advantage as search engines may truncate your text if it extends beyond their limit.
Search Engine Keywords	The keywords defined for the product. See *Defining Keywords* (page 100) for more information.

Uploading Product Images

ProStores allows you to display two images for each product - the thumbnail view and the full-size photo view. There are several methods for uploading images to your store:

- When adding or updating a product in the Product Manager, use the **Browse** buttons to upload the image files.
- When adding or updating a product in the Product Manager, automatically generate the thumbnail image from the photo image.
- You can also upload product images by using the Upload Images feature. See *Uploading Images* (page 18) for more information. Once the images are uploaded, you can enter the names of the images you wish to use when adding or updating product information.

Exporting/Importing Product Information

In addition to entering product information using the Product Manager, you can also enter information by importing a spreadsheet file.

To add products by importing a file:

1. Save the product table template (available in the Help Panel on the Export page) so you can use it as a template for entering information
2. Enter the product information for the products you wish to add. Do *not* enter anything in the **ProductNo** column. See *Products Table* (page 168) for more information.
3. Browse to **Support | Import**. The Import page appears.
4. Select the Product table from the list.
5. Browse to the file you just created.
6. Click **Import**. If you have a large file, this process may take a while.

To export the product table:

1. Browse to **Support | Export**. The Export page appears.
2. Select the **Products** table from the **Table to Export** list.
3. Select a target platform from the list.
4. Click **Export**. The **Select Category** page appears. Select the category of products you wish to export and click **Export**. The **Export Results** page appears.

5 Click the **Review Export Status** link. The **Export Status** page opens in a new window.

6 Click the link to view the the **Export Log**. The **Export Log** opens in a new window.

7 Review the log for any errors. If no errors exist, click the link at the bottom of the **Export Log**. A **File Download** dialog box opens.

8 Click the **Save** button.

9 In the **Save As** dialog box, navigate to the location where you want to save the file, and then click the **Save** button.

10 Close the **Export Log** window.

11 Close the **Export Status** window.

To update products by importing a file:

1 Open the file that you exported and downloaded to your computer in a spreadsheet program.

2 Edit the product information, being sure *not* to modify the information in the **ProductNo** and **SKU** columns.

See *Products Table* (page 168) for more information.

3 Browse to **Support | Import**. The Import page appears.

4 Select the Product table from the list.

5 Browse to the file you just edited.

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

Associating Categories to Products

Before a product can be found in your store, you must attach it to a category. If you do not attach a category to a product, the only way customers can access it is if you create a direct link to the product.

You must define your store categories before you can associate them to products. See *Maintaining Categories* (page 75) for more information.

To associate a category to a product:

1 View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Click the categ button for the product to which you wish to associate a category. The Product Category List page appears.

3 Under **Add Categories**, select a category from the list and click **Add**.

To remove a category from a product:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the categ button for the product whose category you wish to remove. The Product Category List page appears.
3. Under **Current Categories**, select the check box of the category you wish to remove and click **Delete**.

Defining Keywords

This page allows you to add and enter keywords used both by internet search engines, and your store's search function.

Search engine keywords are used to attract customers to products from searches done from internet searching pages. These keywords are typically entered into a search engine's database from a program commonly called a 'spider'. Spiders process text they 'see' on a page, entering what they consider keywords into their search engine's database. When they are done processing the text of a page, they look for links on the page and follow them to reach another page to continue working.

In recent years the meta-keyword tag has become less important in the view of spiders due to abuse by page developers who entered huge numbers of unrelated words. This does not mean the keyword tag is useless. It is still viewed and processed by spiders. To increase the effectiveness of keywords on your products pages you should take care in selecting three to seven words that will appear several times each within the text of your product's detail page. By entering the keywords in well formed sentences throughout your product's description you will increase the visibility of a page within an internet search.

If you have enabled the URL feature for products these keywords will also be placed within the URL of the detail page. By placing keywords within the URL, a spider will 'see' a greater number of keyword occurrences and view the page more favorably. Some analysis suggests that the appearance of keywords in the URL has greater weight in some spider's processing. Most analysis claims that the appearance of keywords in a URL is of greater benefit than the keyword <meta> tag. See *Search Engine Optimization (SEO) Manager* (page 120) for more information on URL tuning.

To define internet search engine keywords:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the keys button for the product to which you wish to assign search engine keywords. The Product Keyword List page appears.
3. Under **Search Engine Keywords**, enter three to seven keywords, separated by spaces.
4. Click **Apply**.

To edit or remove internet search engine keywords:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the keys button for the product to which you wish to assign keywords. The Product Keyword List page appears.
3. Under **Search Engine Keywords**, edit or delete keywords.
4. Click **Apply**.

To define custom storefront search keywords:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the keys button for the product to which you wish to assign keywords. The Product Keyword List page appears. The **Generated Keywords** list at the bottom of the page includes those keywords that have been automatically created by ProStores.
3. Under **Product Search Keywords**, enter the custom keywords, separated by spaces.
4. Click **Add**. The keywords are added to the **Current User Entered Keywords** list.

To remove custom storefront search keywords:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the keys button for the product to which you wish to assign keywords. The Product Keyword List page appears.
3. In the **Current User Entered Keywords** list, select the check boxes of the keywords you wish to remove and click **Delete**.

Field Help: Product Keywords

(Advanced Edition only)

This page allows entry of keywords for both internet searching outside your store and product searching within your store.

Search Engine Keywords

Enter three to seven keywords (separated by spaces) that a potential customer will most likely use when searching for products using an internet search engine. These keywords will appear in the HTML <meta> keywords tag on the product detail page. If you've enabled the Search Engine Optimization (SEO) options for product links, then the first four of these keywords will also appear in the URL. If no entry is made in this field, ProStores will use the Product Search Keywords and/or Generated Keywords.

For better results, these same keywords should also exist in your product description.

Product Search Keywords

These keywords are used for searching within your store for products. Review the list of generated keywords to determine what additional keywords would be helpful to a customer looking for a particular product within your store.

Current User Entered Keywords

This is a list of the keywords you entered in the **Product Search Keywords** field.

Generated Keywords

These keywords are used for searching within your store for products. These keywords are automatically generated by ProStores based on the product's name, sku, category, manufacturer, ISBN, MPN and UPC.

Working with Inventory Attributes

(Advanced Edition only)

This is where detailed inventory information about a product's size, color, and/or subscription information is maintained. This area is important if you will be tracking the inventory or sales of individual product attributes. If so, you must enter a separate SKU number and quantity for each attribute you want to track. You should use inventory attributes if:

- You need to track inventory for each attribute.
- You need to track pricing separately for each attribute.
- You want to define promotions for a specific attribute.
- This is a subscription product.
- This product offers an electronic fulfillment option.

You can offer attributes (such as colors and sizes) without creating inventory attributes (by entering the options in the product profile's Attribute fields), but you will not be able to track inventory separately for each attribute unless you create attributes.

If you change the attribute values on the Product Information page, you will need to update the product's inventory attributes as well.

To add product attributes:

Make sure you have already entered attribute labels on the product profile - you will use this information when adding inventory attributes.

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1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the attrib button for the product to which you wish to add attributes. The Product Attributes page appears.
3. Under **Add Attribute**, enter the information in each field. See *Field Help: Product Attributes* (page 103) for more information.

4 Click **Submit** to save your work. The information appears in the **Current Attributes** list.

To update product attributes:

1 View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Click the [attrib] button for the product whose attributes you wish to update. The Product Attributes page appears.

3 Under **Current Attributes**, click the number of the attribute you wish to edit. The Product Attribute Update page appears.

4 Edit the information in each field. See *Field Help: Product Attributes* (page 103) for more information.

> You can also assign promotions to this attribute at this time by clicking **Promotions** See *Placing Individual Products on Sale* (page 69) for more information.

5 Click **Submit** to save your work.

To delete product attributes:

1 View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Click the [attrib] button for the product whose attributes you wish to delete. The Product Information page appears.

3 Click **Attributes**. The Product Attributes page appears.

4 Under **Current Attributes**, click the number of the attribute you wish to delete. The Product Attribute Update page appears.

5 Click **Delete**. The attribute is deleted.

Field Help: Product Attributes

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

Basic Information

Field	Description
SKU	Enter a unique SKU (or item number) for the attribute. You may want to simply add a suffix (indicating size or color) to the main product's SKU when adding a product.
ISBN	Enter the ISBN (International Standard Book Numbering).
MPN	Enter the manufacturer's product number.
UPC	Enter the UPC code.
Condition	Select the condition of the product from the list.
Subscription/Billing Interval	*(Subscription products only)* Select the frequency with which this subscription should be billed from the list.
Interval Begins	*(Subscription products only)* Select the period when the billing interval should begin from the list.

Field	Description
Subscription Period	*(Subscription products only)* Enter the length of the subscription (for example 3 months, 2 years, etc.). The interval (months, quarters, years) is based upon your selection in the **Subscription/billing Interval** list.
Renewal	*(Subscription products only)* Select this check box to apply any updates to this information to purchased subscriptions when they are renewed.
Color (or custom defined label)	Select an item from the list or leave as "All" if this is not applicable. If you select "All", you cannot select "All" in the other attribute field (unless this is a subscription product).
Size (or custom defined label)	Select an item from the list or leave as "All" if this is not applicable. If you select "All", you cannot select "All" in the other attribute field (unless this is a subscription product).

Billing Information

Field	Description
New Subscription	*(Subscription products only)* Select how you want to handle billing for a new subscription. **Bill for full interval** applies to two situations: a) if you have selected "Date of purchase" for **Interval Begins**, and b) if the customer purchases the subscription in the middle of the period, and you want to bill them for the entire period. **Prorate billing** means that if the billing period is the first of the month, and the customer signs up in the middle of the month, they will only be billed for half the month. **Begin billing at next interval** means that if the customer purchases the subscription in the middle of the billing period, they will not receive a bill until the *next* interval period.

Pricing Information

Field	Description
Price	Enter the price you want to charge customers for the product attribute.
Startup Fee	*(Subscription products only)* If you want to charge a setup fee for the subscription, enter the fee here.
Cost	Enter what the product cost you to purchase.

Inventory Information

Field	Description
Quantity	Enter the quantity of this product you currently have in stock. It is important to update this field if you are planning on tracking inventory for each attribute.
Unit of Measure	Enter the quantity the customer receives if they order one of something. Generally used if your business does not sell products individually (eaches), but requires the customer to order by the case, box, etc.

Shipping Information

Field	Description
Weight	Enter the shipping weight for shipping charge calculation.

Field	Description
Length	Enter the length of the product attribute. This value should be entered if you are using a packing algorithm. For compliance with USPS shipping calculation algorithms, be sure to enter the length of the longest side of the package in the **Length** field. Failure to do so could result in inaccurate shipping fee calculations. *This option is only available if it has been enabled by your Site Administrator* If you are using the Federal Express shipper, Federal Express will round this value to the nearest whole number. *This option is only available if it has been enabled by your Site Administrator*
Width	Enter the width of the product attribute. This value should be entered if you are using a packing algorithm. If you are using the Federal Express shipper, Federal Express will round this value to the nearest whole number. *This option is only available if it has been enabled by your Site Administrator*
Height	Enter the height of the product attribute. This value should be entered if you are using a packing algorithm. If you are using the Federal Express shipper, Federal Express will round this value to the nearest whole number. *This option is only available if it has been enabled by your Site Administrator*
Container	If you are using a packing algorithm, select the type of container in which this attribute should be packed. If the item is to be packaged in its own container, select “Self” - the shipping rate will then be calculated using the attribute’s dimensions.
Electronic Fulfillment	If this attribute can be downloaded, click **Browse** to browse to the download file. When you click **Submit**, this file will be uploaded to your Store Data Area, “fulfillment” directory. If you no longer want this attribute to be downloadable, select the **Product will not be downloaded** check box. Doing so only removes the download capabilities - it does not remove the download file from the Store Data area. In addition, you must have entered a series of “delivery methods” on the main product page in one of the attributes fields, and then on this page, select the electronic delivery method from the appropriate field. The maximum file size for uploading a file is 10 MB. Also, it is recommend that you compress your files to *.zip using an archiving software. This will not only reduce the file size (for quicker downloads), but will ensure that the browser doesn’t attempt to open the file instead of download it.

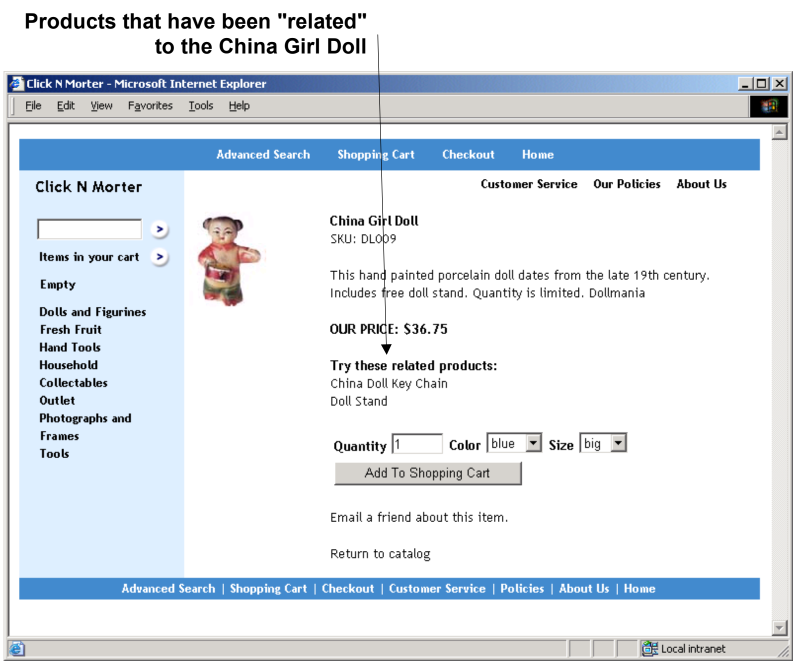
Relating Products and Accessories

(Advanced Edition only)

Related products are used to upsell or cross-sell related products or accessories that might not appear in the search results of the primary product. This option can prompt the customer to consider a product for which they didn't search, but is related to something in which they have already shown an interest.

For example, if you have Product A related to products B, C, and D, those three products will appear on the Catalog Detail page with the heading "Try these related products." Doing so might encourage your customer to purchase those products, even though they didn't search for them.

The `<ss:include template="catalogrelated"/>` tag will display related products, and by default, is included on the Catalog Detail page. The format of the related products list is defined in the Catalog Detail - Related Products template.



While the customer is viewing the China Girl Doll, the Related items offer others to go with this.

To relate products:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the relate button for the product to which you wish to relate other products. The Related Products and Accessories page appears.

3 Under **Add Related Products**, select those products you wish to relate and click **Relate**. The products appear in the **Current Related Products** list. To select multiple products, hold down the [CTRL] key as you make your selections.

To remove product relationships:

1 View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Click the relate button for the product whose relationships you wish to remove. The Related Products and Accessories page appears.

3 In the **Current Related Products** list, select the check boxes of the products whose relationship you wish to remove and click **Delete**.

Defining Product Personalization Options

(Advanced Edition only) Advanced Mode

Product services allow you to gather personalized information. This information applies to the entire quantity of a product ordered (for example, if the customer orders five towels, this information would apply to all five towels).

If you need to gather different information for each product (for example, different monograms for each of the five towels), use Order Extensions. Please see *Using Order Extensions* (page 108) for more information.

To allow for personalization, do the following:

1 Either add a new product or update an existing product. See *Finding and Viewing Products* (page 87) for more information.

2 Under **Options**, check the **Option 1** or **Option 2** boxes, and define the custom options that are available to the customer (engraving, etc), and the fee for the service.

3 When finished defining your products, the product services fields will appear on the Cart - Add template (which appears within the Catalog Detail template). If they do not appear, edit the template to include the code below.

```
<ss:if test="$product.customService1Enabled">
  <p><ss:value source="$product.customService1Title"/>
  <ss:value source="$product.customService1Fee" format="currency"/>
  <input type='text' name='custom1' maxlength='50' size='20'/></p>
</ss:if>
<ss:if test="$product.customService2Enabled">
  <p><ss:value source="$product.customService2Title"/>
  <ss:value source="$product.customService2Fee" format="currency"/>
  <input type='text' name='custom2' maxlength='50' size='20'/></p>
</ss:if>
```

Using Order Extensions

(Advanced Edition only) Advanced Mode

Order extensions allow you to gather additional information for *each* product ordered (as opposed to Product Services, which gather information that applies to *all* products ordered). See *Defining Product Personalization Options* (page 107) for more information.

For example, if you sell custom-made dolls, you might want to gather several pieces of information for each doll, such as the doll's name, hair color, skin color, etc.

To set up order extensions:

1. Identify the information you need to gather for the product.
2. Either edit the Order Extensions template to gather this information, or create a custom Order Extensions template. You should have a unique Order Extensions template for each product that requires Order Extensions.
3. Either add a new product or view a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
4. In the **Basic Information, Order Extensions** section, select the **Gather order extensions during checkout** check box.
5. Select the template you edited or created from the **Template** list.
6. Click **Submit**.

Now, when the customer purchases a product with Order Extensions, they will be prompted for that information during the checkout process.

The information entered by the customer may be viewed by opening the invoice, and then selecting the product name link.

Setting Up Subscription Products

(Advanced Edition only) Advanced Mode

ProStores allows you to sell a product where the shopper can sign up for a period of time, be billed on a monthly, quarterly or yearly basis, and have the product shipped per the time period indicated. Examples of subscription products include magazines or "item of the month" clubs.

PayPal and WorldPay do not accept subscription payments.

To set up a subscription product:

1. Browse to **Store | Product Preferences**. The Product Preferences page appears.
2. Select the Subscription Preferences you wish to enable for your store. See *Field Help: Product Preferences* (page 124) for more information.
3. Browse to **Product | Add Product**. The Add Product page appears.

4 Enter all product information, being sure to select the **Subscription** check box. See *Field Help: Products* (page 90) for more information.

5 Click **Submit** to save your work. The Subscription Product Attributes page appears.

6 Under **Add Subscription Attribute**, enter the information in each field. See *Field Help: Product Attributes* (page 103) for more information.

7 Click **Submit** to save your work. The information appears in the **Current Attributes** list. You will need to create a unique attribute for each billing period you wish to offer.

8 Click **Return to Product**, assign the product to a category, and then enter any other information (such as serial numbers, related products, etc).

Now, when a customer searches for and selects a subscription product, they will be asked to choose a subscription period (which was specified in the Subscription Attribute Information). Once they select a subscription period and add the product to their cart, they can continue shopping and check out as usual.

Once a subscription product has been ordered, you can manage that subscription using the Order Manager. See *Managing Subscriptions* (page 135) for more information.

You can also set up a subscription specifically for store membership. See *Setting Up a Store Subscription* (page 60) for more information.

Supporting Downloadable Products

(Advanced Edition only) Advanced Mode

ProStores allows you to sell products that your customers can download from your site, such as software, images, music, etc.

To set up and manage downloadable products:

1 First, review your Product Preferences (in the Store Manager area), and indicate when you want to allow customers to download products (either after payment has been authorized, or after payment has been received).

2 Create a new product. When creating the product, be sure to add a “delivery” method to one of the attribute fields. For example, you might enter a “Media” attribute label, with the following values: “CD-ROM, Download, Floppy Disk.” Click **Submit** when done.

3 Once the product is created, add an attribute for each delivery method (by clicking the Attribute button on the Product View or Product List page). When creating the attribute for the “download” delivery method, click **Browse** (under **Shipping Information**) to browse to the download file.

Now, when a customer purchases this product as a download, and the order is approved for downloading, they can download the file by going to your Customer Service, Downloads page.

By default, customers are only allowed to download the product once for each product purchased (if they order five of a product, they can download it five times). Once they've downloaded it, it will no longer appear on the Customer Service Downloads page. If you want to allow the customer additional downloads:

1. Search for the completed order and view the invoice. See *Searching for Invoices* (page 137) for more information.
2. Click the **Adjust Invoice Downloads** link. The Adjust Downloads page appears.
3. Enter a new number in the **Max Downloads Allowed** field and click **Change**.

In addition, you can view the status of each download attempt. To do so:

1. Search for the completed order and view the invoice. See *Searching for Invoices* (page 137) for more information.
2. Click the **View Invoice Downloads** link. The Downloads page appears, displaying information about each download attempt.

List items on eBay

ProStores makes it possible to increase the visibility of your products by allowing you to sell your products on eBay.

Before you can list your ProStores products on eBay, you must first create a user account with eBay.

ProStores supports the listing of products on eBay, and checkout of eBay listings. To revise or end an listing, you'll need to do so at eBay.

Understanding the eBay Listing Process

The ProStores/eBay listing process is as follows:

1. If you don't have one already, create a seller's account with eBay.
2. eBay requires that you grant permission to access your eBay account in order to post listings. To grant permission, select the **Grant permission** link.
3. Indicate if you would like to add links to your eBay listings to your ProStores store, and indicate if you want the winning bidder to checkout using your ProStores store (instead of using eBay's checkout) on the ProStores eBay Administration page. See *eBay Listing Set Up* (page 111) for more information.
4. Create one or more listing templates, and designate one as the Quick-List Default Template. Listing Templates simplify listing on eBay by providing a flexible way to pre-populate fields with listing data.

   Quick List requires at least one listing template, but the Listing Wizard does not have this requirement. See *eBay Listing Templates* (page 112) for more information.

5 You can view your live and pending products on the eBay Listings page. See *Managing eBay Listings* (page 116) for more information.

6 If you indicated that you want eBay listings to checkout using your ProStores store, all eBay "Pay Now" buttons will redirect the listing winner to your ProStores store for checkout. Once the customer completes the checkout process, you can manage their order just like any other order using the Order Manager.

7 If the listing winner checks out using the eBay checkout process, the eBay Listings page will show that the purchase was completed at eBay.

eBay Listing Set Up

Before you can sell your products on eBay, you must register as a seller with eBay and grant ProStores permission to access your eBay account in order to post listings. In addition, you must set your ProStores Web store locale to **English (United States)**.

To set up your ProStores Web store to support eBay listing:

1 Browse to **Product** | **Market Demand** | **eBay** | **Setup**. The eBay Setup page appears.

2 Click the **Grant permission** link. This link will take you to an eBay logon and confirmation page; after you log on to eBay and agree to the eBay terms, your browser will return to the eBay Setup page with permissions granted.

> If ProStores has already received access permission from eBay, the expiration date of that access permission will be displayed here.

3 To check for an eBay store associated with your eBay account, click the **Check for eBay Store** link.

4 To direct your eBay customer to ProStores for checkout, select the **Direct eBay buyers to my ProStores storefront for checkout (for items listed from ProStores)** check box. See Field Help: eBay Setup for more information.

5 To display a message to eBay customers at checkout, select the **Display the following message on my ProStores storefront for checkout** check box. You may optionally edit the text to display a custom message.

6 To display links to your live eBay listings in your ProStores storefront, select the **Show Live eBay Listings** check box.

> This will only enable the display of links to listings submitted through ProStores.

7 Click the **Submit** button.

To set the locale for your ProStores Web store:

1 Browse to **Store Manager** | **General**. The General Preferences page appears.

2 Expand the **Store Locale** section if necessary.

3 Select **English (United States)** in the **Locale** list.

4 Click the **Submit** button.

eBay Listing Templates

Your eBay **Listing Templates** provide default values for all of your eBay listings. You may enter values for all fields, or no fields except for the required template name. ProStores will use the values from your selected template to fill in the fields when listing an item on eBay. You may create up to 25 Listing Templates.

When you list an item through the **List Item on eBay Wizard**, the item values will be set automatically based upon the selected template. The wizard then allows you to enter additional item specific values. You can select another template to choose a new set of default values, and you can modify any of the defaulted values.

When you list multiple items using **Quick List**, the items will be listed with values from the Default Quick-List Template. You may select a different Listing Template to use for the default values for each item individually. The Item Quick List then allows you to individually enter a Category, Format, Price and Quantity for each item.

All template fields are optional, except for the template name, which is required. This gives you the flexibility to define default values for as many fields as suits your particular needs.

To create a Listing Template:

1. In **Store Administration**, navigate to **Product | Market Demand | eBay | Templates** to open the **Listing Templates** page.
2. Click the **Create New Template** button.
3. In the **Choose a Category** section of the **Create Template** page, enter the template name, select the eBay site for the listing, enter the category information, and then click the **next** button.
4. In the **Item Details** section of the **Create Template** page, enter values for the item details.
5. Click the **Save Template** button to save your settings. The template now appears in the **Listing Templates** page.

To edit a Listing Template:

1. In **Store Administration**, navigate to **Product | Market Demand | eBay | Templates** to open the **Listing Templates** page.
2. Click on the template name for the template you wish to edit.
3. In the **Choose a Category** section of the **Create Template** page, change any appropriate field values, and then click the **next** button.
4. In the **Item Details** section of the **Create Template** page, change any appropriate field values.
5. Click the **Save Template** button to save your changes..

eBay Tools

The eBay Tools provide features for building a ProStores product catalog from your existing eBay Store listings. If you have an eBay Store associated with your eBay user account, you can also copy the categories, store logo, and theme settings from your eBay Store into ProStores.

The Build Catalog from eBay Listings feature on the eBay Tools page allows you to create products from your eBay listings, then select the products you would like to copy into your ProStores catalog. eBay listings include ProStores, eBay Store, and individual listings based on your eBay seller account.

To build your catalog from eBay listings, perform the following steps:

1. Browse to **Product | Market Demand | eBay | Tools**. The eBay Tools page appears.
2. Select the eBay site that has the listings you want to copy to ProStores.
   - **eBay** retrieves listings from eBay.com.

     \- or -
   - **eBay Motors** retrieves vehicle listings from U.S. eBay Motors.
3. Select the listings (Active and/or Ended) you would like to copy to ProStores.
   - **Active Listings** selects all active listings from the selected eBay site.
   - **Ended Listings** selects all listings from the selected eBay site that have ended within the specified time period.
4. Click the **Retrieve** button. ProStores displays a list of items that meet your criteria.
5. In the Listings Retrieved From eBay page created in the steps above, select the check box for each listing you want to copy to your catalog.
6. Make any necessary **Listing Title** or **SKU** changes to the selected items.
7. Click the **Copy to Catalog** button to copy the products into your store.
8. Browse to **Product | List** to display the list of products in your catalog.
9. Verify product description, quantity, and price before offering the product on your storefront.
10. In order for your new products to show up on your storefront, be sure to assign a category and enable **Show in catalog** for each product.

ProStores also supports adding products to your store by importing eBay Turbo Lister or File Exchange files, generated by eBay. To import from a file, perform the following steps:

1. Browse to **Support | Import**. The Import page appears.
2. Select the eBay file type to which you wish to import the file from the list.
3. Browse to the file you wish to import.
4. Click **Import**. If you have a large file, this process may take a while.

The categories in these files will be imported as eBay category numbers. To change them, you can either modify the CSV file before importing it, or modify each product's category assignments after importing the file.

The eBay Store section on the eBay Tools page lets you copy the categories, store logo, and theme and display settings from your eBay Store into ProStores. The eBay Tools page only displays this section if you have an eBay Store associated with your eBay user account.

To copy your eBay Store theme and display settings into ProStores, perform the following steps:

1. Browse to **Product | Market Demand | eBay | Tools**. The eBay Tools page appears.
2. Select the **Categories** check box if you want to copy your eBay Store categories into ProStores.

   If you would like to review your eBay Store categories before copying them, click the **View** link in the **Categories** section.

3. Select the **Store Logo** check box if you want to copy your eBay Store customized logo into ProStores.
4. Select the **Theme and Display** check box if you want to copy your eBay Store theme and display settings to ProStores.
5. Click **Apply**.

Selling Products Using the Wizard or Quick List

Before you can sell your product at eBay, you must register as a seller with eBay.

To post a product to eBay:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Click the eBay button for the product you wish to sell on eBay. The List Item on eBay wizard appears.
3. Enter the information in each field, clicking **Next** when you complete the information on each page. You should refer to eBay's documentation for detailed information on each field.
4. Once you have entered all information, the Summary page appears.
   - To list the listing immediately, select the **Submit listing to eBay now** option and click **Submit**. The product is submitted to eBay for listing.
   - To specify the date/time at which this listing should be listed, select the **Schedule listing for submission to eBay** option, and select the date and time from the lists.
   - If you do not perform any action (such as leaving this page without clicking **Submit**), the listing is pending. You can change the status of this listing by

viewing the listing, selecting its link, and going to the last page. See *Managing eBay Listings* (page 116) for more information.

When a product is submitted to listing on eBay, the quantity of that product in ProStores will be decreased. If inventory is enabled for your store, and the listing ends as unsold, the quantity will be added back to the product automatically. *(Advanced Edition only)*

ProStores makes it possible to send multiple product listings to eBay at one time with Quick List. Quick List uses your eBay Listings Templates for much of the required information so you only have to supply a few details such as eBay category and price.

The following steps must be completed before you can list items using Quick List:

- When creating a product, you must at a minimum include the following information: product name, description, sell price and quantity.
- In the Listing Template that you will use for the items, identify the Item Location.
- In either the Listing Template or in the Quick List page, select a category.

To list an item using Quick List:

1. Browse to **Product | List**. The Product List page appears.
2. Check each product desired and click the **Quick List on eBay** button. The eBay Quick List page appears.

   If you have not designated a listing template as the quick-list default template, a system message appears and provides a link to the **Create Template** page.

3. Make desired modifications to the individual items and submit your listings. If you want to use default values of a template other than the Quick List Default Template, select the appropriate template in **Listing Template**.
4. Select the submit time in **Submit Listings**.
5. Click the **Submit Listings** button.

Display eBay listings on the Storefront

You can automatically display links to products you are selling at eBay on your storefront.

To do so:

1. Browse to **Product | Market Demand | eBay | Setup**. The eBay Administration page appears.
2. To display links to your live eBay listings on your storefront home page and on your catalog detail (product) pages, select the **Show Live eBay Listings** check box. These are the listings that you sent to eBay from ProStores.
3. Click **Submit**. All of your live eBay listings will show on your storefront home page. The live eBay listing(s) associated with a particular product will show on that product's catalog detail page. If the listings do not appear, add the code displayed below.

Storefront Template

```
<ss:if test="$store.isFeatureEnabled('ShowLiveAuctions')">
  Items selling at eBay<br>
  <ss:foreach item="auctionItem" within="$store.products.liveAuctions">
    <ss:link source="$auctionItem.product"/>
    <br>Quantity: <ss:value source="$auctionItem.quantity"/>
    <ss:if test="$auctionItem.color != ''">
      <br>Color: <ss:value source="$auctionItem.color"/>
    </ss:if>
    <ss:if test="$auctionItem.size != ''">
      <br>Size: <ss:value source="$auctionItem.size"/>
    </ss:if>
    <br><br>
  </ss:foreach>
</ss:if>
```

Catalog Detail Template

```
<ss:if test="$store.isFeatureEnabled('ShowLiveAuctions')">
  This item is selling at eBay:<br><br>
  <ss:foreach item="auctionItem" within="$product.liveAuctions">
        <ss:link source="$auctionItem" target="_blank">
      <ss:value source="$auctionItem"/>
    </ss:link>
    <br><b>Quantity:</b> <ss:value source="$auctionItem.quantity"/>
    <ss:if test="$auctionItem.color != ''">
       <b>Color:</b> <ss:value source="$auctionItem.color"/>
    </ss:if>
    <ss:if test="$auctionItem.size != ''">
       <b>Size:</b> <ss:value source="$auctionItem.size"/>
    </ss:if>
    <br><br>
  </ss:foreach>
</ss:if>
```

Managing eBay Listings

The eBay Listings Manager page provides information about listings sent to eBay from your ProStores storefront. It also contains links to specific lists plus search options for quickly finding a listing by title or item number.

The eBay Listings Manager only displays information for eBay listings submitted from ProStores. Information about listings submitted from other listing tools only appears after the listing has closed or completed.

To see the number of listings you have submitted:

- Browse to **Product | Market Demand | eBay**. The eBay Manager page appears. The At-A-Glance section displays the number of products that have been submitted for listing.

To review your eBay listings:

1 Browse to **Product | Market Demand | eBay | Listings Mgr**. The eBay Listings Manager page appears, showing the number of listings categorized by listing status.

2 Select the list you wish to view:

- **All Listings**: All eBay listings.
- **Pending Listings**: Products for which any portion of the Listing Wizard was completed, but which have not been submitted to eBay.
- **Live Listings**: Products successfully submitted to eBay. For fixed price listings, you may have completed sales while the listing is still live.
- **Closed Listings**: Products submitted to eBay where the listing has closed. These could include listings that have a buyer, but the buyer has not completed the checkout process yet. The only reason a listing would remain in this state is if all buyers for the listing have not yet paid or canceled their orders.
- **Completed Listings**: Listings that have either been paid or canceled.

Each type of listings page supports the following actions.

- **Sort the list by Title or End Date**: Click the column heading.
- **Select all items in the list**: Click the check box at the top of the list.
- **Filter the list**: Enter the title or item number in the text box at the top of the list, and then click the **Go** button. The list now only includes items that had the search term in the title or item number.

  To find products that *contain* the word you enter (instead of *starting* with the word you enter), type an asterisk before that word. For example, entering "chair" will only return those products whose full name starts with "chair." However, entering "*chair" will return all products containing that word in their name, including "chair" and "rocking chair."

- **Restore the full list**: With the text box empty, click the **Go** button.
- **Review a listing item**: Click its title link. The eBay listing page opens in a new window.
- **Review the outcome of a listing**: Click its **Status** link. The Listing Outcomes page will appear, with the eBay user ID, e-mail address, quantity purchased, and checkout status of the buyer.

  The **Status** link only appears for closed or completed listings.

- **Delete a pending or completed listing**: Select its check box, and then click the **Delete** button.

  You will need to delete pending listings before you can delete the associated product.

To relist a completed listing:

1. Browse to **Product | Market Demand | eBay | Listings Mgr**. The eBay Listings Manager page appears.
2. Click the **Completed Listings** link. The eBay Completed Listings page appears.
3. Select the check box for each auction item you wish to relist, and then click the **Relist** button. The List Item on eBay wizard appears.
4. Complete the wizard, and submit your listing. See *Selling Products Using the Wizard or Quick List* (page 114) for more information.

Shopping Comparison Sites

ProStores makes it possible to increase the visibility of your products by allowing you to submit your products to major shopping comparison sites.

The only shopping comparison sites that will be available to you are those that support the locale you're using, **and** have been enabled by your site administrator. If you're not seeing any shopping comparison sites, you may want to change your locale to "en_US", or any other locale supported by the shopping comparison sites, on the **Store** | **General** page. If you're still not seeing any shopping comparison sites, contact your site administrator.

In addition to managing your file uploads in ProStores, you will need to manage your "cost-per-click" at the shopping comparison site's web site.

Here are some tips for setting up your product catalog for shopping comparison sites.

Products

- The more information you provide, the better your placement will be. In particular, be sure to include accurate information in the following product fields: ISBN, UPC, MPN.
- When possible, assign a manufacturer to a product.

  ProStores only submits fields from the product, not from any attributes defined for the product. The fields submitted for a marketplace listing include the following: Name, Description (full or brief, depending on the listing configuration), Price, Quantity, Weight, Sku, ISBN, UPC, MPN, and Condition. Be sure to check which fields your marketplace of choice supports.

- Some shopping comparison sites require media type products to be specified. If a product is a book, music or movies item, select the **Media** check box when defining the product.
- Some shopping comparison sites will place your products into a "miscellaneous" category if they consider the product price to be "outside boundaries" (such as $1.00 for a TV set).

Categories

- The more your category names match the categories defined by the shopping comparison site, the better your placement will be.
- If a product is assigned to multiple categories, then the category's "Sort Priority" will be used to determine which category to send to the shopping comparison site. If categories have the same Sort Priority, then the category name will be chosen alphabetically.
- By default, products in all categories will be submitted to a shopping comparison site. You can omit products from an entire category by selecting the **Exclude from Shopping Comparison Sites** check box when defining the category.
- If you make any changes to category names, you must notify your shopping comparison site account manager.

Shipping

- Shipping can sometimes affect your placement. Some shopping comparison sites will give your products lower placement if a shipping amount is not specified. Refer to the shopping comparison site's own documentation for more information.
- Some shopping comparison sites will calculate a shipping estimate based on the product's weight. If the shopping comparison site you're going to use supports this feature, then enter a weight for each product.

Please refer to each shopping comparison site's web site for more information on optimizing your product placements. When communicating with your shopping comparison site's account manager, mention that you are using ProStores to create the "feeds" they receive. This may assist them in processing your catalog

---

To begin working with shopping comparison sites:

1. Register at the shopping comparison site(s) with which you wish to work. A link is provided on the configuration page of each shopping comparison site (**Product | Market Demand | Shopping Sites**).
2. Set up your product catalog. See the tips above for doing so.
3. Configure each shopping comparison site you wish to use. To do so, browse to **Product | Market Demand | Shopping Sites** click the link for the shopping comparison site, and enter the configuration information.
4. Send a setup feed to the shopping comparison site. To do so, browse to **Product | Market Demand | Shopping Sites**, select the shopping comparison site, select the **Setup Feed** check box, and click **Save**.
    - The **Setup Feed** check box is only available on shopping comparison sites with an Inactive or Pending status, and may only be done once a day.
    - At this point, the setup feed has been sent and the shopping comparison site status has been set to Pending. Now, you must wait for a response from the shopping comparison site. Refer to the shopping comparison site web site for more information on this step.

- Depending on the shopping comparison site's response, you may have to make corrections to your product setup. If so, make the changes, then send another setup feed.

5. Once the setup feed has been approved by the shopping comparison site, you can activate it, which tells ProStores to submit the feed per your settings automatically. To do so, browse to **Product** | **Market Demand** | **Shopping Sites**, select the shopping comparison site check box, and click **Activate**.

Deactivating a shopping comparison site means that product feeds will no longer be submitted to a shopping comparison site. Once you deactivate a shopping comparison site, your products will remain posted with that shopping comparison site until they expire (refer to the shopping comparison site's web site for details). To remove products immediately, contact your shopping comparison site account manager.

To remove products from a shopping comparison site:

1. Browse to **Product** | **Market Demand** | **Shopping Sites**. The Shopping Comparison Sites page appears.
2. Select the check box of the shopping comparison site you wish to deactivate.
3. Click **Deactivate**. You are returned to the Shopping Comparison Sites page.

Search Engine Optimization (SEO) Manager

This page allows you to enable search engine optimizations for your store. See *Search Engine Tuning* (page 120) for more information.

To enable URL optimization for each area of your storefront:

1. Browse to **Product** | **Market Demand** | **SEO**. The Search Engine Optimization Manager page appears.
2. Check the box next to each URL type you would like to optimize. You may tune user defined templates, product pages, and search result pages.
3. Click **Apply**.

Search Engine Tuning

Getting Bookmarked

Repeat customers are one key to success. The most important thing to consider in your design and content is getting someone who finds your site to bookmark and come back to you for future shopping. Good page design, well described products and extra information outside of the product information are all things to consider. Going the extra mile in content matters to many shoppers. If you are selling items related to a hobby, include general information on the hobby within your site and link to it. If you are selling a product with detailed specifications available at the manufacturer's site, provide a link but also add your experiences with the product to show that you have knowledge of the product and are not simply a reseller.

Selecting Keywords

Think in terms of keyword phrases instead of single keywords. This will help you stand out from the competition for general terms in the search engines. Of course you still want to pick phrases that will be entered in a search. Specific phrases put you in search results where there is less competition. This should also result in traffic looking specifically for your product.

Verify that your phrases exist in the product description. Without their existence in the page text they are a warning sign to spiders crawling your page (see Things To Avoid).

How to Use Search Keywords in Product Page Content

Regardless of a particular spider's preference to make use of the meta keyword contents, placing common search keywords throughout the content of a page is helpful in being found in internet searching. Each keyword you feel is a likely search term should be placed throughout the page content and appear several times. It is generally good practice to get keywords in the beginning sentences of the first and last paragraph. While the placement of keywords with the content is important it is important to write well structured, clear sentences for the humans who will be deciding if your product is worth buying.

Today's spiders do not consider keywords placed in hidden fields or otherwise disguised on a page. There is the potential that adding keywords outside of the readable page may be interpreted as a sneaky attempt to 'spam' the spider with meaningless keywords.

Writing for the META Description Tag

Writing good content for a meta description tag is very important in search engine optimization. Search engines displaying appealing meta description text will help drive traffic to your site. The text should include the keywords organized into well written sentences. Ideally you should keep the description brief enough to fit within length restrictions of search engine sites. If your best writing comes after the search engine has shortened the display nobody will see your work. Keeping text lengths below one hundred fifty characters should allow its full display within search results.

Some in the search engine tuning field suggest placing keywords towards the beginning of the description is a good policy. This should only be done while keeping readability in mind.

Keyword Usage Within Product Brief Description

Placing important keywords within the brief description of a product will in most cases place the keywords on search result pages on your storefront. If you have selected a layout that does not display the brief as part of the search result, this will of course have no effect.

Alt Text

By default, ProStores includes the product name as "alt text" for all product images. This text is used by search engines to rank pages. If you have made any changes to the templates, especially the Catalog List or Catalog Detail templates, be sure that any product image tags include the `alt="$product.name"` attribute.

Open Directory Project

The Open Directory Project is a very good place to be listed. Search engines value listings on this site because submissions are reviewed by humans and checked for accuracy prior to listing. This site requires you to do some research and submit your site manually to them. Please see details at dmoz.org.

Tools

There are a number of search engine tools available on the internet free of charge you can use to your advantage. Some of these include meta tag generators, keyword and current ranking tools. Keyword tools include generators, proximity analyzers, density analyzers, popularity analysis and related term finders.

Static Page Content Tips

File name choice: If you have enabled URL optimizations for your user defined pages, the filename or template name you are displaying will be placed in the URL's path. This lets you place relevant keywords for the page within the URL by naming the file or template appropriately.

Title: Pick a title that is brief and clear but includes relevant keywords for the page's content.

Reciprocal Linkage

Reciprocal linkage can be a powerful tool to increase your web sites rankings. Some search engines include linkage as a ranking criterion. Typically if your site is linked from a highly ranked site, your site will be given a 'bonus' boost in ranking. Links from other sites also give you another point of entrance to your site.

If you have a relationship with a store owner not directly competing with you, ask if they would be willing to cross-link with you.

Include links on an appropriate page within your store. This may be a content page defined by you, offering additional information to your customers. Include the link with relevant content to avoid appearing as 'link spam' to a robot crawling your site.

Using Pay Services

If you choose to participate in pay-for-placement type programs from a company also providing a natural search service bear in mind that some people will not view these placements as favorably as a top result in the natural search list. If you choose to pay a site only operating as pay-for-placement you will not have this comparison to compete against.

Purchasing keywords can be an effective way to have your pages seen by customers. Before purchasing keywords it is advisable to check what keywords are being used by competitors on their pages. Take this information and evaluate as it pertains to your product or product line.

Things to Avoid

Don't include a keyword or key phrase in your meta tags that is not present on that page. Keywords reinforce the content of the page. Search engines define this practice as spam and rank your page accordingly.

Don't repeat a keyword or key phrase in your meta tags. Again, keywords reinforce the content of a page. The robot will be crawling your page and determining the relevance of a keyword based on how many times it is present and where it is present - not how many times it is put in the meta tag.

Don’t include a keyword that could brand you as an adult site and drive away business. These keywords are not only profane words but potentially words like ‘exotic’.

Don’t attempt to up keyword counts on your page by hiding them in tiny text, hidden fields, a background with the same color as the text or anything else that could be perceived as ‘sneaky’. The robots that crawl the web either already understand these ‘techniques’ or could be changed in the very near future to detect them. The best policy is to write good content.

Don’t link with ‘free-for-all’ sites. Having your link listed on a page with little content but many links is bad. Search engines are marking these sites as ‘spam’ sites. Your presence on these sites could influence their opinion of your site as well.

Don’t use the same title tag throughout your static pages. Using a unique title tag containing relevant keywords for the web page will benefit your rankings in a crawler’s view.

Don’t exclusively use JavaScript links. Spiders cannot crawl links in Java Script. If you want to provide Java Script links you should also include links to the same content on standard links in an appropriate place on your page.

Don’t use page redirects. Anything that takes a customer to another page without an action on their part can be viewed negatively by a search engine. Some of these techniques are the use of META refresh tags, JavaScript and CGI scripts.

Do not submit the same page more than once on the same day to the same search engine.

Do not submit more than the allowed number of pages per engine per engine defined time frame. Engines vary in their rules on submissions and these rules could change. Keep up to date on each engine’s rules.

Don’t include ‘stop’ words as one of your keywords. Stop words include *he his she her I they it this of at on in that the a and are is as be for from to was* and other common, short words. Search engines ignore these words as irrelevant to the content of the page.

How Long Until My Site is Listed?

Search engine’s display of your site will vary in the amount of time after a page has been submitted. Search engines may display as quickly as one week and as long as two months.

Chapter 6: Managing Inventory

(Advanced Edition only)

ProStores offers you real-time display and management features to help you track your product inventory, including the ability to show quantity in stock to your customers and notifying you when products are placed on backorder.

This chapter will describe inventory settings and options.

Setting Inventory Options

The first step in inventory management is to establish your inventory settings.

Setting Product Preferences

Product preferences allow you to define inventory, backorder, subscription, and electronic download options.

To establish product preferences:

1. Browse to **Store** | **Product Prefs**. The Product Preferences page appears.
2. Select each of the inventory options you wish to utilize. See *Field Help: Product Preferences* (page 124) for more information.
3. Click **Submit** to save your work.

Field Help: Product Preferences

Inventory Status

Field	Description
Inventory	Select this check box to enable standard inventory features. This will cause products to be removed from inventory when purchased. In addition, selecting this check box allows you to send notifications to your store Buyer if a product is low on inventory. See *Setting Up Buyer Notifications* (page 126) for more information. *(Advanced Edition only)* If you disable inventory after it has been enabled, all current orders with backordered items will be taken off backorder. *(Advanced Edition only)*
Serialized Inventory	*(Advanced Edition only)* Select this check box to enable serialized inventory features. This will add the ability to associate serial numbers with a product. When a product is purchased, a serial number is taken from the pool of serial numbers and assigned to the purchased product.

Catalog Preferences

Field	Description
Out of Stock	Select this check box to hide products from the shopper when a product is out of stock.
Threshold Reached	*(Advanced Edition only)* Select this check box to hide products from the shopper when a product is low on inventory (the threshold is reached). If no inventory threshold is entered for the product, the default threshold is zero. The product threshold is defined in the Product Manager.

Backorder Preferences

Field	Description
Allow Backorders	Select this check box to ensure a product cannot be purchased if there are not enough products in inventory. If a customer attempts to purchase more than is available, they will be notified that there are not enough products available and will be allowed to adjust their order. If you select "Do not allow backorders" after it was allowed, all current orders with backordered items will be taken off backorder.
Display on Invoice	Select this check box to show backorder status on the invoice. The backorder status will be displayed for each product line item that does not have enough inventory to fill the order. If this option is enabled, then invoices that only have backordered items on them will not appear in either of the Order Manager | Pending | Authorization lists.

Subscription Preferences

Field	Description
Members Only	When selected, you can limit certain categories to valid members. Valid members include anyone who exists in your customer list (either having been added by you, or by customers registering with your store or purchasing a product). If this check box is selected, a link to the Member's Only Catalog (Search) will be displayed on the Header or Footer template. See *Creating a Members-Only Area* (page 59) for more information. Select the **Require Subscription Product to Enter** check box if you wish to require your customers to subscribe to the members-only area, and then enter the product number of the store subscription product. See *Setting Up a Store Subscription* (page 60) for more information. In this case, the only people who are considered valid members are those who have purchased the store subscription.
Customer Options	Select the subscription management options you wish to make available to your customers in your storefront. These options allow your customers to cancel or renew their subscriptions from your storefront.

Download/Electronic Fulfillment Preferences

Field	Description
When to allow downloads	If you are selling products that can be downloaded electronically (such as software), indicate when you will allow customers to download the product. **After Authorization** means that the product can be downloaded once the payment method is authorized. **After funds capture** means that the money has been received, and the order has been

Field	Description
	marked as shipped. See *Supporting Downloadable Products* (page 109) for more information.
Expected speed of product downloads	Select the connection speed that you expect most of your customers to be using. This helps ProStores determine the length of time to allow for downloads.

Setting Up Buyer Notifications

Buyer Notifications allow you to notify your store Buyer when a product is low on inventory. This notification occurs on a schedule determined by your Site Administrator, or can be run on demand.

To set up Buyer Notifications:

1. On the Store Manager | Mail Preferences page, enter the store Buyer's e-mail address.
2. On the same page, select the **Send buyer low inventory notifications** check box.
3. On the Store Manager | Product Preferences page, select the **Enable Inventory** check box.

To run the Buyer Notification service on demand:

1. On The Product Manager page, click the **Low Inventory Products** link. The Low Inventory Products page appears.
2. At the end of the listing, select the **Send Buyer Notifications** check box. The Buyer Notification service is started.

Assigning Inventory to Products

Once you've made your inventory settings, you'll need to enter information into your product profile to track inventory.

Setting Product Inventory

In order to take advantage of ProStores' inventory features, you will need to enter certain information into the product profile.

To do so:

1. View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.
2. Locate the product in the list and click its link. The Product Information page appears.
3. Click **Update**.
4. Enter the following information in the **Inventory** section.

- ♦ Quantity (can also be entered directly on the Product List page)
- ♦ Threshold
- ♦ Unit of Measure
- ♦ Cost

See *Field Help: Products* (page 90) for more information.

5 Click **Submit** to save your work.

Serializing Product Inventory

This feature is only available if you have selected **Enable Serialized Inventory** on the Store Manager | Product Preferences page.

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

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

To add product serialized inventory:

1 View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Click the serial button for the product to which you wish to add serialized inventories. The Product Serialized Inventory page appears.

3 Enter the serial number, and if desired, enter an optional second serial number. They can contain any alphanumeric characters.

4 Click **Submit** to save your work. The information appears in the **Current Serialized Inventory** list.

To delete product serialized inventory:

1 View a listing of your products. See *Finding and Viewing Products* (page 87) for more information.

2 Click the serial button for the product whose serialized inventories you wish to remove. The Product Serialized Inventory page appears.

3 Under **Current Serialized Inventory**, select the check boxes of the inventory you wish to delete.

4 Click **Delete**.

Tracking Inventory

ProStores provides you with several options for tracking inventory status and managing backorders.

Checking Inventory Status

ProStores offers reports to show you the state of your inventory.

The Product Manager contains the following listings:

- **Low Inventory Products**: Inventory is low for the products shown, as defined by their threshold values. If the threshold is not set, a product will not appear on this list until the inventory reaches zero. It is also possible for a product to be backordered and not appear on this report because there is not enough product available to fulfill an order, no inventory will be deducted and the order will move to backorder status. Any remaining product will be available to fill new orders. To see a listing of the information on a particular product, click the product name.
- **Backordered Products**: These products are backordered. To remove a product from backorder status, you must add sufficient inventory into the product quantity area of the affected product.

The Order Manager allows you to view all orders that contain backordered products (Order Manager | Pending | Backorders).

The Report Manager provides the Cost of Inventory report, which allows you to view the total cost of inventory for each product (Report Manager | Inventory).

Managing Backorders

If you don't have enough product inventory to fulfill an order:

From a customer support perspective:

- If any item purchased cannot be filled by the quantity available, the entire order is held until the backordered item(s) can be cleared. The affected order will show up in the Orders Pending Backordered Items list.
- When an item goes on "Backorder," a message to that effect is included on any notifications sent to the Buyer. This option is selected in Store Manager | Mail Preferences.

From an inventory perspective:

- The quantity will not be deducted from the available inventory, but will remain available for other customers.
- Product inventory is decremented only when the quantity available is enough to fulfill the order for an individual product.

Processing Backorders

Backordered items are products that have been ordered, but for which there is not enough quantity in stock to fill the order.

To process an order that has backordered items:

1. Browse to **Order | Pending | Backorders**. Shown is a list of all customer orders that include backordered items.
   - To review an invoice, click the order date.
   - To review the customer profile, click the customer's name. You must have user access to the Customer Manager to access this feature.
   - To cancel any of these orders, select the appropriate check box and click **Cancel**.
2. An order will stay on the list until enough product has been received to fill the entire order. After the product information has been updated with the new quantity, the order(s) will automatically move to the appropriate order status location.

To view a list of all backordered products, See *Specialized Product Listings* (page 88).

To remove a product from backorder status, see *Maintaining Product Profiles* (page 89).

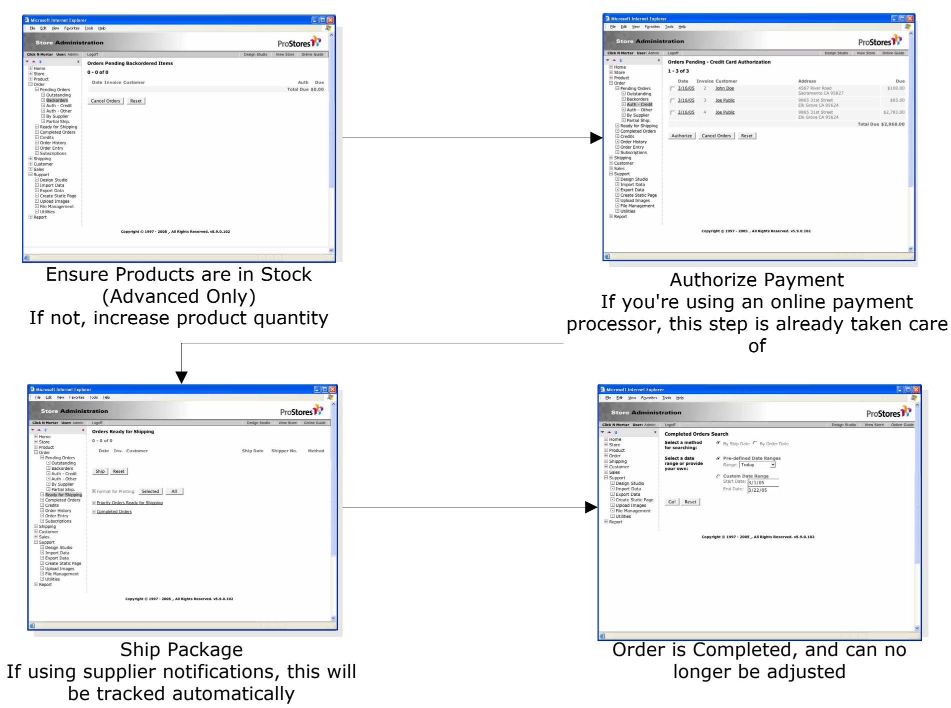
Chapter 7: Processing Orders and Credits

Once a customer has purchased products in your store and confirmed an order, the order cycles through several stages. This chapter describes each of those stages, and the tasks required to complete to manage your orders.

Reviewing and Authorizing Orders

Once a customer purchases a product from your store, it moves through an authorization process.

1. The order is checked for any backordered items. See *Processing Backorders* (page 129) for more information. *(Advanced Edition only) Advanced Mode*
2. The order waits for payment authorization. See *Authorizing Orders - Other Payment Types* (page 132) and *Authorizing Orders - Credit Cards* (page 132) for more information.
3. Up to this point, orders may be adjusted or canceled. See *Adjusting an Invoice* (page 139) and *Canceling Orders* (page 135) for more information.
4. Finally, it waits for shipping approval. See *Shipping Orders* (page 133) for more information.



How an order is processed

Authorizing Orders - Outstanding

Advanced Mode

If you have created outstanding orders using the Order Entry feature (orders that the customer can pay and confirm through the storefront), you can review those orders here.

To authorize an order:

1. Browse to **Order** | **Pending** | **Outstanding**. Shown is a list of all customer orders that have been entered, but have not been confirmed by the customer.
   - To review an invoice, click the order date.
   - To review the customer profile, click the customer's name. You must have user access to the Customer Manager to access this feature.
   - To cancel any of these orders, select the appropriate check box and click **Cancel**.
2. Once the customer has confirmed an order, it will move to the appropriate list (Pending - Credit, Pending - Other, Ready for Shipping, etc.).

PayPal Order Process

When PayPal is used as a Payment Method during checkout, the customer will be forwarded to PayPal to complete the transaction when they click on the PayNow! button on the invoice.

Once they click on the Pay Now! button, an unauthorized order will be placed in your *Orders Pending - Other Authorization*.

To process PayPal orders:

1. If the payment process is completed and successful.
   - The customer will be redirected back to your Invoice Confirmation page and a notification will be sent to your store which will automatically move the order to the *Orders Ready For Shipping* queue.
2. If the order is not completed or is unsuccessful.
   - The order will remain in the *Orders Pending - Other Authorization* queue until you resolve the issue manually. If this occurs, you'll want to review the process log by clicking on the Payment Processor Details link on the invoice page. If there are no details in the Payment Processor Detail log, then this means the customer has not completed the transaction on PayPal's site.
   - If there's a pending message in the Payment Processor Detail record, then you should resolve the pending issue and then manually authorize the order. See *Authorizing Orders - Other Payment Types* (page 132) for more information.
3. If the order is canceled by the customer during the payment process on PayPal's site.

- Notification will be sent to your store and the order will be canceled and removed from the *Orders Pending - Other Authorization* queue.

Authorizing Orders - Other Payment Types

If you allow payment by check or other non-credit card payment methods, you must verify that payment has been received before the product can be authorized for shipping. See *PayPal Order Process* (page 131) for more information regarding PayPal.

To authorize an order:

1. Browse to **Order** | **Pending** | **Auth - Other**. Shown is a list of all customer orders that require authorization.
2. You can perform the following tasks on this page:
   - To review an invoice, click the order date.
   - To review the customer profile, click the customer’s name. You must have user access to the Customer Manager to access this feature.
   - To cancel any of these orders, select the appropriate check box and click **Cancel**.
3. When the payment information has been received, authorize the order by selecting the appropriate boxes and clicking **Authorize**. The order(s) will then move to the Orders Ready for Shipping list.

Authorizing Orders - Credit Cards

If you are processing credit card transactions offline, you will need to indicate if a customer’s credit card has been verified using this feature. If you are processing credit cards using an online payment processor, the system will manage this process automatically.

To manually authorize an order requiring credit card authorization:

1. Browse to **Order** | **Pending** | **Auth - Credit**. Shown is a list of all customer orders that require authorization.
2. You can perform the following tasks on this page:
   - To review an invoice, click the order date.
   - To review the customer profile, click the customer’s name. You must have user access to the Customer Manager to access this feature.
   - To cancel any of these orders, select the appropriate check box and click **Cancel**.
3. When credit card authorization has been received, authorize shipment by checking the appropriate boxes and clicking **Authorize**. The order(s) will then move to the Orders Ready for Shipping list.

Shipping Orders

Once the payment method for an order has been authorized, it is ready for shipping. When you have prepared an order for shipping, you will need to tell Merchant-Defined Shipper that it has been shipped, so that the order can be marked as completed.

To ship an order:

1. Browse to **Shipping**. The Shipping Manager appears.
2. There are several methods for displaying orders:
   - To display all orders ready for shipping, click the Orders ready for standard shipping link.
   - To only display orders ready for priority shipping, click the Orders ready for priority shipping link.
   - To search for orders by tracking number, under Search Options, enter the tracking number and click .
   - To search for orders by customer only, enter the customer's last name, and click .
   - To search for orders by order date, enter a date range, and click .
   - To search for orders by customer and order date, enter the customer's last name, then the order date range, and click .
3. The Orders Ready for Shipping page appears, with orders listed in the order they were received.
4. Select the check box of each order that is ready to ship.
   - Some shippers will color-code the shipping method where blue=second day and red=overnight.
5. Enter the **Ship Dates** and **Shipper Number** for each order being shipped.
6. If you are using a shipper other than/in addition to the Merchant-Defined Shipper, click the **Method** link to configure and review your packing labels. See *Packing Labels* (page 134) for more information. *Advanced Mode*
7. Click **Ship** to ship your orders.
8. Click the order date to display a Packing List in a new window that you can print and send with your orders.

You can also search for a specific invoice by browsing to **Shipping**, entering its number, and clicking . The invoice will appear, with fields allowing you to enter the ship date and shipper number.

You may adjust the shipping date and shipper numbers after the order is completed processing by viewing the invoice and clicking the **Adjust Shipper Details** link. See *The Invoice Page* (page 138) for more information. *(Advanced Edition only)*

Printing Multiple Packing Lists

If you are using a browser that supports CSS Level 2 (such as Internet Explorer 4.0+ or Netscape 7.0+), you can print multiple packing lists at one time. To do so:

1. Browse to **Order | Ready for Shipping**. The Orders Ready for Shipping page appears. Orders ready for shipping are listed in the order they were received.
2. If you wish to print the packing lists with the Shipper Number on them, enter the shipper numbers now.
3. There are two options for printing packing lists:
   - To print selected packing lists, select the orders whose packing list you wish to print and click **Selected** under **Format for Printing**.
   - To print *all* packing lists, click **All** under **Format for Printing**.
4. The packing lists you have selected will appear. While each of the following packing lists will not appear as separate pages in this window, they will print on separate pages if your browser supports this feature.
5. To print, select **Print** from your browser's **File** menu.

Some browsers print header and footer information at the top and bottom of each page. To remove this information, change the Header and Footer settings in your browser's **Page Setup** dialog.

Packing Labels

If you are using a shipper other than/in addition to the Merchant-Defined Shipper that supports the dynamic creation of shipping labels (such as Federal Express and UPS), the Merchant-Defined Shipper will automatically generate packing labels that may be printed for each box needed. Even if you have selected **Total Product Weight** as your order basis (instead of **Packing Algorithm**), the packing algorithm will generate a list of containers and labels for you to use as a starting point in packing your order.

All Shippers require that labels be printed using a laser printer. If you do not have a laser printer, you cannot use this feature. In addition, international label generation is not supported at this time. Please complete shipping paperwork for international packages manually.

Some shippers, such as UPS, require a ship-to phone number. To require your Customer to provide a ship-to phone number on checkout, go to **Store Manager | Payment Prefs**, select the **Require ship-to phone number during checkout** check box in the **Credit Cards (Merchant Account)** section, and then click the **Submit** button.

To configure and review packing labels:

1. Browse to **Order | Ready for Shipping**. The Orders Ready for Shipping page appears.
2. Click the **Method** link. The Package Configuration page appears, with a list of containers that the packing algorithm has identified for packing at the top of the page.

- To add another container, click **Add**. A new line appears in the **Manage Packages** table. Enter the weight and ship date for that package.
- To remove a package, select its check box and click **Remove**. The package is removed from the list.

3 To print packing labels, click **Generate Labels**. A window opens containing the labels you will need to ship this order.

- While all of the labels will appear as a single page in this window, they will print on separate pages if your browser supports this feature. Currently, this feature is only supported by browsers that support CSS Level 2 (such as Internet Explorer 4.0+ or Netscape 7.0+).
- Some browsers will print header and footer information at the top and bottom of each page. To remove this information, please change the header and footer settings in your browser's **Page Setup** window.

Every time you define containers and generate labels, you are sending a transaction to your shipper that will be billed to you. Therefore, if you regenerate the same set of labels, you will be billed by your shipper. You can view generated labels in your Store Data Area, "shiplabels" directory.

4 To continue printing, use your browser's Print function.

Labels are stored as images in your Store Content Area, "shiplabels" directory, for up to two days after the specified ship date. These can be viewed using the Server File Manager (located in the Support Manager).

Canceling Orders

ProStores allows you to cancel orders while they are still pending. Once an order has been marked as shipped, you can only delete it, or issue a credit against it.

To cancel an order:

1 Review orders. See *Reviewing and Authorizing Orders* (page 130) for more information.

2 Select the check box of the order you wish to cancel.

3 Click **Cancel Orders**.

Managing Subscriptions

(Advanced Edition only)

Once a customer has purchased a subscription product, that subscription will automatically generate invoices (which you can then process like any other order). However, you can also manage the subscriptions themselves.

PayPal and WorldPay do not accept subscription payments.

To modify a subscription:

1 Browse to **Order** | **Subscriptions**. The Subscriptions Search page appears.
2 Enter your search criteria and click **Search**. To display a list of all subscriptions, click **Search** without entering any criteria. The Subscriptions List appears.
3 Click the number link of the subscription you want to modify. The Subscription Information page appears.
4 Enter or edit the information. See *Field Help: Subscription Information* (page 136) for more information.
5 Click **Submit** to save your work.

To renew a subscription:

1 Browse to **Order** | **Subscriptions**. The Subscriptions Search page appears.
2 Enter your search criteria and click **Search**. To display a list of all subscriptions, click **Search** without entering any criteria. The Subscriptions List appears.
3 Click the number link of the subscription you want to modify. The Subscription Information page appears.
4 Click **Renew**. The subscription is renewed.

To cancel a subscription (which retains the subscription information, but stops generating invoices from this subscription):

1 Browse to **Order** | **Subscriptions**. The Subscriptions Search page appears.
2 Enter your search criteria and click **Search**. To display a list of all subscriptions, click **Search** without entering any criteria. The Subscriptions List appears.
3 Select the check boxes of the subscriptions you wish to cancel.
4 Click **Cancel**. The subscription is cancelled.

To delete a subscription (which removes the subscription information and stops generating invoices for this subscription):

1 Browse to **Order** | **Subscriptions**. The Subscriptions Search page appears.
2 Enter your search criteria and click **Search**. To display a list of all subscriptions, just click **Search**. The Subscriptions List appears.
3 Select the check boxes of the subscriptions you wish to delete.
4 Click **Delete**. The subscription is deleted.

Field Help: Subscription Information

Basic Information

This section contains basic information regarding the purchased subscription. You may modify the following fields .

Field	Description
Price	Enter the price you want to charge customers for the subscription.
Quantity	Enter the quantity of the subscription purchased.

Additional Product Information

This section contains detailed information about the product. You can change the product weight here.

Status

This section contains information such as the last invoice date, renewal date, etc. You can modify the next date this subscription should be billed, and the expiration date of the subscription.

Shipping Information

This section contains information regarding where the product will be shipped.

Payment Information

This section contains the customer's payment information.

PayPay and WorldPay do not accept subscription payments.

Gifts

This section contains information regarding gift shipments.

Working with Invoices

The invoice is the statement of purchases and charges billed to a customer. This section describes searching for and working with invoices.

Searching for Invoices

To view a list of invoices that are pending or need to be shipped:

- Browse to **Order | Pending: Credit (or Other)** or, browse to **Order | Ready for Shipping: Standard (or Priority)**.

To view a list of invoices that have been completed (shipped):

1. Browse to **Order | Completed Orders** link.
2. Select a search type of **Ship Date** or **Order Date**.
3. Select either **Pre-defined Date Ranges** or a **Custom Date Range**.
    - If you select **Pre-defined Date Range**, select a range from the list.
    - If you select **Custom Date Range**, enter the date range you wish to view.
4. Click **Go**. A list of completed orders fitting your criteria appears.

5 To view an order, click the invoice date.

To search for a specific invoice (pending *or* completed):

1 Browse to **Order**. The Order Manager page appears.

2 Under **Search Options**, in the **View Order by Tracking or Invoice Number** field, enter the tracking or invoice number and click . The invoice appears.

The Invoice Page

From this page, you can format an invoice for printing, issue a credit, view payment processor details, adjust an invoice, cancel an invoice, view all outstanding credits against an invoice, adjust shipper details, delete an invoice, and view audit history.

If there is a shipper tracking number associated with the invoice (only occurs when using a shipper other than the Merchant-Defined Shipper, and if shipping labels have been generated), you can view the package tracking information by clicking the tracking number link.

This requires that the following code be included on the Invoice template:

```
<ss:link source="$invoice.shipTrackNumber">
  <ss:value source="$invoice.shipTrackNumber.number" default=" "/>
</ss:link>
```

Link	Availability	Description
Printer Friendly Version	Always	Click to print the invoice. Another window will appear that you can print.
Payment Processor Details	Always	If you are using an online payment processor, click to view detailed payment processor information related to the current invoice.
Adjust Invoice	Pending Only	Click to make an adjustment to this invoice. See *Adjusting an Invoice* (page 139) for more information.
Adjust Invoice Advanced	Pending Only	Click to make advanced adjustments to this invoice. Selecting this link will delete the current invoice and create a new one using the Order Entry feature. See *Entering Orders Manually* (page 145) for more information. *(Advanced Edition only)*
Cancel	Ready for Shipping Only	Click to cancel the order.
Issue Credit	Completed Only	Click to issue a credit toward this invoice. See *Issuing a Credit* (page 142) for more information.
Credits Against This Invoice	Completed Only	Click to view any credits against this invoice. A listing of all credits made against this invoice appears.
View Invoice Downloads	Completed Only	If any product in this order was downloadable, click this link to view the status of the customer's download attempts. *(Advanced Edition only)*
Adjust	Completed	If any product in this order was downloadable, click this link to

Link	Availability	Description
Invoice Downloads	Only	adjust the number of times the product may be downloaded. *(Advanced Edition only)*
Adjust Shipper Details	Completed Only	Click this link to view the ship date and current shipping numbers, as well as to adjust the shipping date and shipper numbers.
Delete Invoice	Completed Only	Click to delete the invoice (if a credit has been issued on this invoice, you can not delete the invoice). You will be prompted to confirm this action. Click **Yes** to delete the invoice. The total amount of the Invoice will be credited back to the customer.
Invoice Audit History	Always	Click to view all activity that has taken place for this invoice.
Order Extensions	If the order has extensions	If your customers have purchased products with an Order Extensions template assigned to them, you can view the order extensions information entered during checkout by viewing the invoice, and then clicking the product name. The Order Extensions form appears. *(Advanced Edition only)*

Adjusting an Invoice

After placing an order, you or the customer may wish to make changes to it. This may be done before a product has been shipped.

To increase the quantity, or make other adjustments to an invoice, use the Invoice Adjust Advanced link on the invoice page. *(Advanced Edition only)*

To adjust an order:

1. View a listing of pending invoices. See *Searching for Invoices* (page 137) for more information.
2. Click the number of the invoice you wish to adjust. The invoice appears.
3. Select the **Adjust Invoice** link.
4. Enter the revised quantity (decrease only) for each product in the text box. Tax and/or shipping will automatically be recalculated.
5. Click **Submit** when done.

Splitting an Invoice

If a customer places an order that contains both in-stock items and backordered items, ProStores lets you split the invoice into multiple invoices.

If necessary, you can split an invoice more than once, and you can reduce the ship quantity in the split invoice. You can also edit the shipping amount, but the shipping amount cannot exceed the total shipping amount on the original invoice. The tax amount will reflect the quantity shipped on the split invoice; it will not exceed the total tax for the original invoice. All split invoices will display a split invoice notation. ProStores will apply any invoice promotions or credits up to the amount of the invoice total. Any remaining balance will be applied to the original invoice when the items ship.

You must be aware of what your payment processor allows. If you split an order, ProStores processes the payment as usual. If you selected **future fulfillment** when you configured your payment processor, you must make sure that the payment processor allows multiple captures on one authorization. Otherwise, ProStores will try to process the payment, but the payment request may fail if your payment processor rejects the request.

Payment Processing:
Processor preferences can be set to either **immediate** or **future** fulfillment.

*For **immediate** fulfillment*, the payment processor authorizes, and ProStores captures, the full amount of the order. Any split orders would not incur any charges.

A Federal Trade Commission (FTC) mail-order rule requires merchants to ship within thirty (30) days of receipt of payment. If you cannot ship within that period, the FTC requires merchants to notify the customer and provide a way for the customer to cancel the order.

*For **future** fulfillment*, the payment processor authorizes the initial invoice amount when the customer confirms the invoice, and issues an authorization number for the full invoice amount. For a split invoice, ProStores captures the split invoice amount. When the items on the original invoice ship, ProStores will capture the invoice amount using the same authorization number.

Some processors allow this; others do not. You must determine whether your payment processor allows multiple captures on a single authorization in order to prevent payment authorization errors.

The following definitions apply to invoice splitting:

Field	Description
Original Invoice	An invoice that has not been created by splitting from another invoice. For example, the invoice as it appears when the customer confirms it is an original invoice.
Split Invoice	An invoice that was created by splitting an original invoice.

The following conditions must exist prior to invoice splitting:

- The original invoice must contain backorders.
- Inventory must be enabled.
- Backorders must be allowed.
- The original invoice must contain both in-stock and backordered items.

The following restrictions govern invoice splitting:

- The original invoice cannot use the following payment methods:
    - PayPal Standard

    - WorldPay
    - Electronic Check
- You cannot split a split invoice.
- You cannot split an invoice for which you have sent a supplier notification.
- You cannot advance adjust a split invoice.

To split an invoice:

1. Navigate to **Order** > **Pending Orders** > **Backorders**. The Orders Pending: Backordered Items page opens.
2. Click the link in the **Date** column of the invoice you wish to split. The invoice appears.
3. Select the **Split Invoice** link.
4. (Optional) Enter the revised quantity (decrease only) for each product, or a revised shipping amount, and then click the **Update Quantities** button.
5. Click the **Submit** button. A success message indicates the invoice numbers of the original invoice and of the split invoice.

Viewing Invoice Audit History

You can view all activity that has taken place for this invoice.

To do so:

1. View a listing of orders. See *Searching for Invoices* (page 137) for more information.
2. Click the number of the invoice whose history you wish to view. The invoice appears.
3. Select the **Invoice Audit History** link. The **Invoice Audit History** page appears.

Printing Invoices

If you like, you can print an invoice without any of the ProStores Store Administration navigation and headings.

To do so:

1. View a listing of orders. See *Searching for Invoices* (page 137) for more information.
2. Click the number of the invoice that you wish to print. The invoice appears.
3. Select the **Printer Friendly Version** link. The invoice appears in a new browser window, using the format defined in the Invoice - Print template.

Viewing Payment Processor Details

If you are using an online payment processor, you can view detailed payment processor information related to the current invoice, including the transaction date and ID, authorization codes, AVS code and reference code.

To do so:

1. View a listing of orders. See *Searching for Invoices* (page 137) for more information.
2. Click the number of the invoice whose details you wish to view. The invoice appears.
3. Select the **Payment Processor Details** link. The Payment Processor Details page appears.

Managing Credits

ProStores allows you to issue credits toward a customer's purchase.

In addition, you can apply a store credit to a customer. See *Applying a Store Credit* (page 144) for more information. *(Advanced Edition only)*

Issuing Credits Against Invoices

Credits against invoices are credits applied toward a particular purchase.

Issuing a Credit

Credits can only be issued against completed orders.

To issue a credit:

1. View a listing of invoices. See *Searching for Invoices* (page 137) for more information.
2. Click the date to open the invoice.
3. Click **Issue Credit** at the bottom of the page. The Issue Credit page appears.
4. Select the items you wish to credit, and if necessary, enter the information for the credit. See *Field Help: Issuing a Credit* (page 143) for more information.
5. Click **Submit** to save your work.

You can also create store credits. For more information, see *Applying a Store Credit* (page 144). *(Advanced Edition only)*

Field Help: Issuing a Credit

Apply Credit

Field	Description
Line Item Credit	To issue a credit for a line item, leave this check box selected. If this item is not being credited, clear the check box.
Shipping	Select this check box to credit shipping charges. You may also choose to credit partial shipping charges by entering a different amount. The default is to *not* credit shipping charges.
Inventory	*(Advanced Edition only)* Select this check box to return products to inventory. This is optional since you may be returning the items to the manufacturer. When serialized products are returned to inventory, the last serial number on the invoice will be replaced first, with others following in that order if applicable.
Store Credit	*(Advanced Edition only)* Select this check box to issue a store credit, rather than issue the credit toward a method of payment.
Credit Note	Enter any text you would like to appear as a note on the credit.

Viewing Credits

To view a list of customer credits:

1. Browse to **Order | Credits**. The Credits page appears.
2. Choose either the **Predefined Date Ranges** or **Custom Date Range** option by clicking the appropriate button. You may choose to search by order date or ship date.
3. Choose a predefined date range or enter a custom date range.
4. Click **Go**. The Credits List appears.
    - To review the credit, click the credit date.
    - To review the invoice, click the invoice number.
    - To review the customer profile, click the customer's name. You must have user access to the Customer Manager to access this feature.

Viewing Credits Against a Specific Invoice

To view credits made against an invoice:

1. Browse to **Order**. The Order Manager page appears.
2. Search for the completed order whose invoice you wish to view. See *Searching for Invoices* (page 137) for more information.
3. Click **Credits Against This Invoice**: click to view any credits against this invoice. A listing of all credits made against this invoice appears.
    - To view the credit issued, click the date. From the credit page, you have the option to view the affected invoice by clicking the invoice number.
    - To view the affected invoice, click the invoice number.

- To view the Customer Profile, click the customer name. You must have user access to the Customer Manager to access this feature.

Applying a Store Credit

(Advanced Edition only) Advanced Mode

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

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

To issue a store credit:

1. View a listing of your customers. See *Viewing Customers* (page 158) for more information.
2. Click the customer name. The Store Credit page appears, displaying basic information about the customer and the current store credit balance for the customer.
3. Enter the amount of credit you want to give in **Store Credit to Apply**. To take away credit, enter a negative amount in the following format: ($1,234.56).
4. Enter any text you would like to appear as a note on the credit in **Credit Note**.
5. Click **Submit** to save your work.

You can also apply credit to a specific invoice. See *Issuing a Credit* (page 142) for more information.

Viewing Store Credits

(Advanced Edition only) Advanced Mode

To view store credits:

1. Browse to **Customer**. The Customer Manager page appears.
2. In the **Store Credit** field, type the starting characters of the customer's name and click .

   To list all customers, click without entering any characters. The Store Credit list appears. Store Credits appear in the **Credits** column of the list

Entering Orders Manually

(Advanced Edition only) Advanced Mode

Typically, orders are created when customers buy products using your online store. However, ProStores allows you to manually enter orders in Store Administration. This is useful if you want to track orders for your brick and mortar store, or track telephone orders.

To enter orders in Store Administration.

1 Browse to **Order | Order Entry**. The Order Entry - Customer Search page appears.

2 Select the type of order you wish to create.

   - **Create a completed/paid invoices** creates a standard invoice for which payment information will be collected/entered now.
   - **Create an outstanding invoice to be paid online** creates a "pending" invoice, for which the customer will enter payment information in the Customer Service, Account History area of the storefront.

3 Select a method for searching. You can search by last name, company or customer number.

   You may also add a customer at this time. To do so, click the **Add Customer** link.

4 Enter your customer search criteria and click **Go**. A list of all customers matching your search criteria appears.

5 Select the name of the customer for whom you wish to enter an order. The Order Entry page appears.

6 Enter the information for each section. See the following for more information:

   - *Adding Products to an Order* (page 146)
   - *Updating Address Information* (page 146)
   - *Updating Payment Information* (page 146)
   - *Updating Order Detail* (page 147)

7 When you're finished entering the order, click **Confirm Order**. The Invoice/Receipt appears.

8 To edit the shipping information, select an option from the Shipping list, and click **Change**.

9 Click **Confirm**. The order is saved, and an Order Confirmation page appears. If the WorldPay payment option has been enabled by the Site Administrator, and the customer has selected that option, click **Pay Now at WorldPay** to continue with processing the payment.

Adding Products to an Order

To add products to an order by SKU:

1. On the Create Order page, enter the SKU in the **Add Product By SKU** field and click .
2. If the product has any attributes, a Product Detail page will appear. Enter the detail information and click **Submit**.
3. The product is added to the **Line Item Detail** table.

To add products to an order by searching for them:

1. On the Create Order page, click the **Add Product by Searching** button. The Advanced Search page appears.
2. Enter the search criteria for the product and click **Search**. A list of all matching products will appear.
    - If the product you wish to add has no attributes, enter the product quantity and click **Submit**.
    - If the product does have attributes or custom options, click the product name. The Order Entry - Add Product with Attributes page appears. Enter the detail information and click **Submit**. You are returned to the Order Entry page.
3. The product has been added to the product table

To change product quantities after they have been added to the products table:

- Enter the new quantity for the product and click **Change**. The quantity is updated.

Updating Address Information

To update manually entered order address information:

1. Under **Address Information**, click to **Update**. The Order Entry - Update Address page appears.
2. Enter or edit the payment and ship to addresses.
3. If necessary, enter a message to include when shipping the order in the **Ship To** section.
4. Click **Submit** when done. You will be returned to the Order Entry page.

Updating Payment Information

To update an order's payment information:

1. Under **Payment Information**, click **Update**. The Order Entry - Update Customer Payment Information page appears.

2 Select a payment method, and enter any detail information for the method to be used for this order. To update the credit card number, select **Update Credit Card**, click **Update Payment** and enter the number.

3 Click **Update Payment** when done. You will be returned to the Order Entry page.

Updating Order Detail

To update an order's detail information:

1 Under **Order Detail**, enter or edit the information. See *Field Help: Order Detail* (page 147) for more information.

2 Click **Submit** when done. The information will be saved, and you will remain on the Order Entry page.

Field Help: Order Detail

Order Detail

Field	Description
Order Type	Select **Create a completed/paid invoices** to create a standard invoice for which payment information will be collected/entered now. Select **Create an outstanding invoice to be paid online** to create a "pending" invoice, for which the customer will enter payment information in the Customer Service, Account History area of the storefront.
Note	Enter any notes for the invoices.
Promotion Code	If this order is utilizing a promotion, enter its code here.
Gift Wrap	If this order is to be gift wrapped, select this check box.
Purchase for Resale	If the customer intends to purchase this product for resale, select this check box. The customer must have a resale number entered in their Customer Profile.
Sales Person	If necessary, assign a sales person to this order using the list.

Exporting Orders

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

To export your orders:

1 Browse to **Order | Export**. The Export page appears.

2 Select Orders from the list.

3 Select a target platform from the list.

4 Click **Export**. A filter page appears.

5 To filter the export by the date the order was created, select a pre-defined date range, or enter a custom date range. If you do not wish to limit your export by date, select a pre-defined date range of "All".

6 The Export Results page appears.

7 To view the status of the export, click the **Review Export Status** link.

8 When the export is complete, click the “click here” link to view the log and download the file to your computer.

Chapter 8: Managing the Supply Chain

(Advanced Edition only)

The Suppliers option allows you to manage your supply chain. Use it to associate products to suppliers, manage orders and communicate with suppliers.

Maintaining Supplier Profiles

Use this feature to add or update a supplier.

To add a supplier:

1. Browse to **Product | Suppliers**. The Suppliers page appears.
2. Browse to **Add Supplier**. The Add Supplier page appears.
3. Enter the information in each field. See *Field Help: Suppliers* (page 149) for more information.
4. Click **Submit** to save your work.

To update a supplier:

1. View a listing of your suppliers. See *Viewing Suppliers* (page 150) for more information.
2. Select the supplier you wish to update. The Supplier Profile page appears.
3. Edit the information in each field. See *Field Help: Suppliers* (page 149) for more information.
4. Click **Submit** to save your work.

To delete a supplier:

1. View a listing of your suppliers. See *Viewing Suppliers* (page 150) for more information.
2. Select the check boxes of the supplier(s) you wish to delete.
3. Click **Delete**. The suppliers are removed from the list.

Field Help: Suppliers

Basic Information

Field	Description
Name/Address	Enter the name and address information for the supplier.
Fax	Enter the supplier's fax number. If you choose Fax as the notification method below, then this is the fax number where orders will be sent.
E-mail	Enter the supplier's e-mail address. If you choose E-mail as the

Field	Description
	notification method below, then this is the address where orders will be sent.
Suffix	*(Advanced Edition, Supplier Connect module only)* Sometimes it's easier to track communications if you append a suffix to the invoice number when communicating with a supplier. If you choose to do this, then you can enter a suffix that helps identify that order.
EDI Code	*(Advanced Edition, Supplier Connect module only)* Enter the supplier's Electronic Data Interchange code. This is required in order for the supplier to electronically submit data.

Notification Options

Field	Description
Method	*(Advanced Edition, Supplier Connect module only)* If you do not want to notify this supplier, choose **None**. If you select **Fax**, and your Site Administrator has enabled Faxaway accounts, enter the registered Faxaway account on the Supplier General Preferences page.
Group By	*(Advanced Edition, Supplier Connect module only)* If a supplier is set to be notified by e-mail or fax, the **Group By** option should be set to *By Order*. If they are set to be notified by **Download**, the **Group By** option should be set to "All."
Template	*(Advanced Edition, Supplier Connect module only)* Select the template to use when creating the fax, e-mail or download file. A template must be chosen if you select any notification method.
Mark as shipped	*(Advanced Edition, Supplier Connect module only)* Depending upon your agreement with your supplier, you may choose to have an order marked "shipped" immediately upon notification. If so, select this check box.

Viewing Suppliers

To view a list of suppliers:

- Browse to **Product | Suppliers | List**. The Supplier's List page appears.

Or...

1. Browse to **Product | Suppliers**. The Suppliers page appears.
2. Under **Search Options**, in the **Suppliers** field, type the starting characters of the supplier's name and click .

   To list all suppliers, click without entering any characters. The Supplier's List page appears.

3. A list matching your search criteria appears.

Communicating with Suppliers

(Advanced Edition, Supplier Connect module only) Advanced Mode

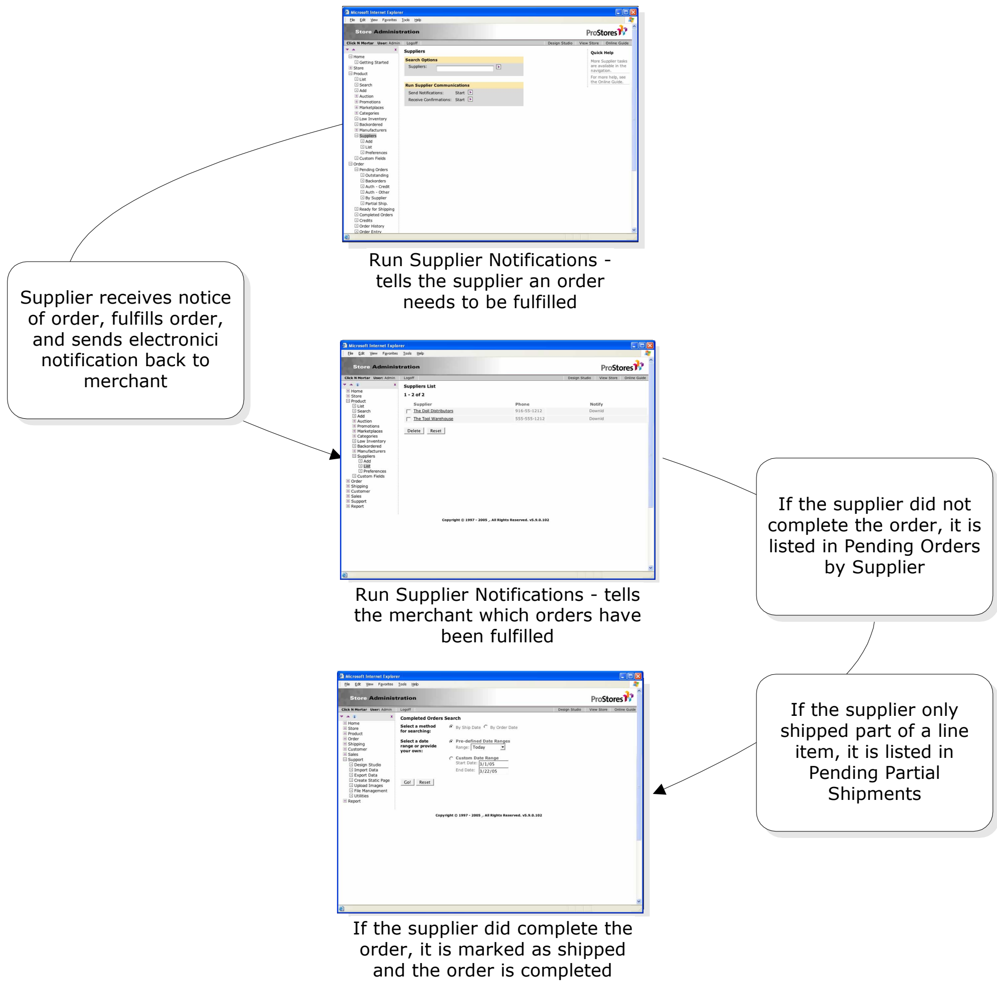
The Supplier Communications option allows you to manage your supply chain electronically.

Supplier Communications Overview

The Supplier Communications process works as follows:

1. Suppliers are created in the Product Manager. See *Maintaining Supplier Profiles* (page 149) for more information.
2. Suppliers are then assigned to products in the Product Manager. See *Maintaining Product Profiles* (page 89) for more information.
3. If you will be receiving supplier confirmations using e-mail or fax, set the appropriate mail or fax settings in Supplier General Preferences. See *Supplier General Preferences* (page 152) for more information.
4. The customer purchases products from the store.
5. The customer's order is authorized and placed in a "ready for shipping" status.
6. Suppliers are notified automatically that orders have been placed that need to be filled by the supplier. The method of notification is selected in the supplier's profile.
    - You can check with your service provider to determine the frequency with which the Supplier Notification service is run. If you need to run it manually, see *Running Supplier Communications* (page 153) for more information.
    - If your supplier is using the download method, they will FTP to your server, switch to the "download" directory, and download the supplier files.
7. Upon filling the order, the supplier will either send an e-mail or file to your store with the shipping information. See *Supplier Confirmation Files* (page 154) for more information.
8. When the Supplier Confirmations service is run, the database is updated with that information.
    - If an order did not have any action taken by a supplier, it will appear in the **Order** | **Pending** | **By Supplier** list.
    - If only a portion of any particular product in an order was shipped by the supplier, it will appear in the **Order** | **Pending** | **Partial Shipments** list.
    - If all items in an order were shipped, the order will be marked as complete.
    - If there are multiple suppliers per invoice, only the last received shipping tracking number with that invoice will be saved. To view the supplier and shipping information for each confirmation, you can download and review the archive files using the Support Manager | File Management tool - the files are located in the Store Data Area/suppliers/incoming/archive/ directory.

9 If you have opted to send the customer shipping confirmations, the customer will receive an e-mail for each supplier whose products they ordered.



Understanding Supplier Communications

Supplier General Preferences

This feature allows you to set up the appropriate mail and fax preferences so that you can send and receive Supplier confirmations.

To set supplier general preferences:

1 Browse to **Product | Suppliers | Preferences**.

2 Enter the information in each field. See *Field Help: Supplier General Preferences* (page 153) for more information.

3 Click **Submit** to save your work.

Field Help: Supplier General Preferences

Incoming Mail Preferences

Please contact your Site Administrator for help in setting up your POP account.

Field	Description
Mail Server	Enter the POP server you use to receive supplier confirmation e-mails.
E-mail Account	Enter the e-mail address that is set up to receive supplier confirmations.
Password	Enter the password for the e-mail account that receives supplier confirmations.
Server Port	Enter the mail port for the server you use to receive POP e-mail (defaults to port 110).

Fax Information

Field	Description
Registered Faxaway Email Account	*This option is only available if it has been enabled by your Site Administrator*. Enter the name of registered Faxaway Email account.

Running Supplier Communications

These services may be scheduled to run automatically. Contact your Site Administrator for more information.

Send Notifications takes the information regarding orders, and sends that information to your suppliers.

To manually run supplier notifications:

1. Browse to **Product | Suppliers**. The Suppliers page appears.
2. Under **Run Supplier Communications**, click the Send Notifications button.
    - If a supplier's profile has a notification method of **E-mail**, the notifications will be sent to the e-mail address specified in the supplier's profile.
    - If a supplier's profile has a notification method of **Fax**, the notifications will be faxed to the Fax number specified in the supplier's profile. You must set up your Supplier General Preferences to support Faxaway. *This option is only available if it has been enabled by your Site Administrator*
    - If a supplier's profile has a notification method of **Download**, the notifications will be exported to your Store Data Area/Suppliers/Download/ directory.
    - By default, the Supplier EDI 850 template supports one "segment" in the inner <ss:foreach> loop. If you modify the template to support more than one segment, you will need to modify the parameter in the "<ss:eval source="$detailCount.set($detailCount.multiply(1))"/> tag to reflect the number of segments.

Receive Notifications takes the information you have received from your suppliers in e-mail or download format, and updates the database with that information.

Before running Receive Supplier Confirmations, you should have either set up an e-mail account in Supplier General Preferences, or you should have copied any download files you have received from your suppliers to the /suppliers/incoming/ directory (in your Store Data Area).

To update your database with supplier confirmations:

1 Browse to **Product | Suppliers**. The Suppliers page appears.

2 Under **Run Supplier Communications**, click the Receive Notifications button. The service is started, updating the database with the information submitted by your suppliers.

Supplier Confirmation Files

Supplier confirmations must be submitted in a comma-delimited file with Header (H) and Detail (D) records. The format is as follows:

```
"H",customer number,invoice number,
supplier invoice number,"shipper number",
"ship via","ship date" (mm/dd/yyyy format),
invoice total ($0.00 format)

"D",customer number,invoice number,
supplier invoice number,"ship via","ship date"
(mm/dd/yyyy format),invoice total ($0.00 format),
"sku","qty ordered","qty shipped",price ($0.00 format)

"D", ...

"D", ...
```

There can be multiple header records (with corresponding detail records) per file.

Suppliers can submit these files using one of the following methods:

- They may be uploaded using FTP to your store's Store Data Area, /suppliers/incoming/ directory.
- They may be e-mailed to your store. If you wish to receive supplier confirmations via a Post Office Protocol (POP) Server, you will need to set up the appropriate preferences. See *Supplier General Preferences* (page 152) for more information.

Viewing Pending Orders by Supplier

You can view a list of pending customer orders broken out by supplier. The list defaults to show all suppliers, but you can select any supplier from the list. For each supplier, the reason the order is pending is shown.

To view orders by supplier:

1 Browse to **Order | Pending Orders | By Supplier**. The report appears.

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

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

4 To mark an order as shipped, select the **Status** check box and click **Ship Marked Suppliers**

"Partial Shipments" are those orders where a supplier has shipped a portion of a single line item. For example, if an order contains 5 of Product A, and the supplier only ships 2, the order will appear as "partially shipped".

To view orders that have shipped with partial shipments:

1 Browse to **Order | Pending | Partial Shipments** link.

2 To review an invoice, click the order date. See *The Invoice Page* (page 138) for more information.

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

4 To mark an order as shipped, select the check box, enter the ship date, and click **Ship**.

Partial shipments only occur in stores where Supplier Notifications and Confirmations are run.

Troubleshooting Supplier Communications

If you are having trouble with supplier communications, check for the following:

- Either check to see that the Supplier Notification service has been run (in Store Administration), or check with your Site Administrator to see that the service has been run.
- Did a user ship the orders in the administration area before the Supplier Notification was run? Supplier notification only runs for orders marked as "Ready for Shipping."
- Check all products to ensure that they are associated with a supplier.
- For each supplier, check the **Notification** options. If a supplier is set to be notified by e-mail or fax, the **Group By** option should be set to *By Order*. If they are set to be notified by **Download**, the **Group By** option should be set to "All."
- Do you have unique SKU's for all your products? The product SKU is used to match a supplier to an order, and if multiple products within an order share the same SKU, the confirmation will not be processed. If this is the case, the following error will appear in the errors_in.txt file (which can be viewed using the File Manager, Store Data Area/suppliers/incoming directory):

```
Jun 19, 2003 conf_20030619215822.txt: Supplier could not be
determined from the confirmation detail record
Record Keys – D,2,8,1
```

The second to the last string (in this example, “8”) is the order number that will need to marked as shipped manually.

Chapter 9: Working with Customers

Your customer list contains the names of those who have previously shopped or registered at your store, as well as names you add yourself. By keeping your customer list up to date, you can target sales to those customers, offer special pricing to groups of customers, and view their order history.

This chapter will cover maintenance of customer profiles, working with customer groups, and viewing customer information. *(Advanced Edition only)*

Defining Customer Custom Fields

(Advanced Edition only) Advanced Mode

You can assign a title to each of the eight custom text fields that are associated with each customer. These titles will be shown in the customer profile. They can also be added to certain templates so that you can gather additional information from your customers, or display information regarding their account.

These fields should be set up before adding customers to your database.

To set up customer custom fields:

1. Browse to **Customer | Custom Fields**. The Customer Custom Fields page appears.
2. If you want these fields to appear in the storefront (to collect customer information), select the **Show Custom Fields** check box. This will cause any custom fields that you define to appear on the Checkout New Customer and Register templates. If they do not appear, enter the code displayed below on those templates.
3. Enter titles for each of the custom fields you wish to use.
4. Click **Submit** to save your work.

```
<ss:if test="$store.isFeatureEnabled('ShowCustomerCustomFields')">
<table>
  <ss:if test="$store.customers.customLabel1">
  <tr valign=top>
    <td><ss:value source="$store.customers.customLabel1"/>:</td>
    <td><ss:edit source="$customer.customText1" size="30"/></td>
  </tr>
  </ss:if>
  <ss:if test="$store.customers.customLabel2">
  <tr valign=top>
    <td><ss:value source="$store.customers.customLabel2"/>:</td>
    <td><ss:edit source="$customer.customText2" size="30"/></td>
  </tr>
  </ss:if>
  [repeat for each custom field...]
</table>
</ss:if>
```

Viewing Customers

To view a list of customers:

- Browse to **Customer | List**. A list of all customers will be displayed.

Or...

1. Browse to **Customer**. The Customer Manager page appears.
2. Under **Search Options**, type any characters that ProStores should look for *within* your selected search criteria (see below) and click .
   - The default search criteria is to search using the **By Last Name** option.
   - To search by the customer's e-mail address, select **By E-mail**.
   - To search by the customer's company, select **By Company**.

   To list all customers, click without entering any characters.
3. A list matching your search criteria appears. For example:
   - If you entered "son", and searched by last name, customers with the last names of "John**son**", "Thoma**son**ville" and "**Son**tino" would be returned.
   - If you entered "adomain", and searched by e-mail, customers with e-mail addresses of "jane@**adomain**.com" and "joe@**adomain**.net" would be returned.

To search by customer number:

1. Browse to **Customer**. The Customer Manager page appears.
2. Under **Search Options**, enter the customer number in the **Go Direct** field and click .
3. A list matching your search criteria appears.

Maintaining Customer Profiles

The customer profile is where customer information can be added and updated.

You can also import information for multiple customers using the Import/Export feature. See *Exporting Tables* (page 166) and *Importing Tables* (page 167) for more information.

Mall participants can only edit demographic information if the Mall store has enabled that option. Please see your Site Administrator for more information.

To add a customer:

1. Browse to **Customer | Add**. The Add Customer page appears.

2 Enter the information in each field. See *Field Help: Customer Profile* (page 159) for more information.

3 Click **Submit** to save your work.

To update a customer profile:

1 View a listing of your customers. See *Viewing Customers* (page 158) for more information.

2 Click the link of the customer you wish to update.

3 Edit the information in each field. See *Field Help: Customer Profile* (page 159) for more information.

4 If you made changes to the customer's payment information, and wish to apply those changes to all of the customer's active subscriptions, select the **Apply payment changes to the customer's active subscriptions** check box. *(Advanced Edition only)*

5 Click **Submit** to save your work.

To delete a customer:

1 View a listing of your customers. See *Viewing Customers* (page 158) for more information.

2 Click the link of the customer you wish to delete. The Customer Profile page appears.

3 Click **Delete**. A confirmation page is shown confirming that this is the customer you want to delete.

4 Click **Yes** to delete the profile. If you do not wish to delete this profile, click **No**.

A customer profile cannot be deleted if there are any invoices associated with the customer. You must first cancel any pending orders or delete the completed orders before you can delete the customer. You can delete all orders using the Store Manager | Maintenance feature, or individually by searching for an invoice and deleting it.

Field Help: Customer Profile

Mall stores can only see and edit demographic information. Mall Stores will not display credit or order information on this page. Stores participating in malls can only edit the payment and store limit fields.

Basic Information

Field	Description
Demographic Information	Enter the customer's name, password, address and phone number and e-mail information. The following fields are required: First Name, Last Name and E-Mail. You can only change the customer's password, you cannot view it. If left blank, the password is not changed.
	If you are using the UPS shipper, and enter a Company name, UPS will calculate a commercial rate instead of a residential rate. If no company

Field	Description
	name exists, UPS will charge a residential rate.
Order Limit	*(Advanced Edition only)* Enter the customer order limit. This field will override the store order limit.

Custom Information

Enter up to eight additional types of customer information. Custom field titles are defined on the Customer Manager Custom Fields page. *(Advanced Edition only) Advanced Mode*

Payment Information

Select the type of payment the customer is using.

If you made changes to the customer's payment information, and wish to apply those changes to all of the customer's active subscriptions, select the **Apply payment changes to the customer's active subscriptions** check box. *(Advanced Edition only)*

If the Store Manager | Payment Preferences | **Require customer's country to match store country** check box is selected, and the customer's country does not match the store country, no information will appear here.

Other Information

Field	Description
Customer Group	*(Advanced Edition, Customer Plus module only)* If this customer is a part of a group that has already been defined, select that group from the list. See *Customer Groups* (page 161) for more information.
Sales Person	*(Advanced Edition, Sales Manager module only)* Select the customer's sales person from the list. The default is **None**.
Resale Number	*(Advanced edition only)* If the product is to be resold, enter the customer's resale number. If a resale number is on file and the customer indicates at purchase time that the purchase is for resale, no tax will be calculated. To allow the customer to indicate that a purchase is for resale, add the following tags to the Checkout and Checkout New Customer templates: `<ss:checkbox source="resale"/><ss:edit source="$customer.resale"/>`.
Authorization	*(Advanced Edition only)* Select this check box if this customer is allowed to purchase products requiring special authorization.

Viewing Customer Order and Product History

This feature allows you to view all orders placed by the selected customer. The list shows the invoice date, activity (credit, sale), invoice number, invoice total and status (ordered, shipped, etc.).

To view a customer's order history:

1. View a listing of your customers. See *Viewing Customers* (page 158) for more information.
2. Click the customer's order history link. The Customer History page appears.
3. To view a list of all products ordered by the customer, click the **Customer Product History** link. The Customer Product History page appears.

Customer Groups

(Advanced Edition, Customer Plus module only)

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

Maintaining Customer Groups

Advanced Mode

To create a list of customer groups:

- Browse to **Customer | Groups**. A list of all customer groups will be displayed.

Or...

1. Browse to **Customer**. The Customer Manager page appears.
2. In the **Customer Groups** field, type the starting characters of the customer group name and click .

   To list all customer groups, click without entering any characters.

3. A list matching your search criteria appears.

To add a customer group:

1. Browse to **Customer | Groups**. The Customer Groups page appears.
2. Click the **Add Customer Group** link. The Add Customer Group page appears.
3. Enter the information in each field. See *Field Help: Customer Groups* (page 162) for more information.
4. Click **Submit** to save your work.

To update a customer group:

1. View a listing of your customer groups. See *View Groups* (page 82) for more information.
2. Click the customer group you wish to edit. The Customer Group Profile page appears.

3 Enter the information in each field. See *Field Help: Customer Groups* (page 162) for more information.

4 Click **Submit** to save your work.

To delete a customer group:

1 View a listing of your customer groups. See *View Groups* (page 82) for more information.

2 Click the customer group you wish to delete. The Customer Group Profile page appears.

3 Click **Delete**. The group is deleted.

Field Help: Customer Groups

Group Information

Field	Description
Group	Enter a name for the group.
Description	Enter a description for the group.

Discount Information

Field	Description
No Discount	Select this option if this group is not eligible for special discounts.
Percent Discount off Sell Price	Select this option if this group is eligible for a discount as a percentage off a product's "sell" price. Then, enter the percentage discount (for example, 0.05 = 5%), and if true, select the **Apply Discount in Addition to Any Promotion** check box.
Cost plus percent	Select this option if this group is eligible for special pricing that is a percentage above cost, and enter the percentage.

Assigning Customer Groups

To assign a customer group to a customer:

1 View a listing of your customers. See *Viewing Customers* (page 158) for more information.

2 Click the link of the customer with which you wish to work.

3 In the **Other Information** section, select the customer group you wish to assign to this customer from the list.

4 Click **Submit** to save your work.

Chapter 10: Maintaining Store Administration

ProStores Store Administration provides you with several tools to help you maintain your files, and database information.

This chapter will discuss the maintenance features available in ProStores.

Managing Files

File Management allows you to view, manage and move files located in your directory on the server.

There are three content areas:

Content Area	Description:
Store Content Area	Contains all files that can be viewed via a browser, such as static HTML pages and images.
Store Data Area	Contains all files that either cannot or should not be viewed via a browser, including configuration and log files.
FTP Area	If your Site Administrator has provided you with an FTP directory on the server that is outside of your Store Data Area, this link will provide you with access to that FTP area. See your Site Administrator about providing you with an FTP directory.

To switch from one area to another, click the link under **Switch to**.

To manage your server files:

1. Browse to **Support** > **File Management**. The File Management page appears.
2. To view a file or image, click its link. You can also “right-click” the link to download the file.
3. To open a folder, click its link.
4. To go back to the folder containing the current folder, click the **Parent Directory** link.
5. To delete a folder or file, select the folder or file and click **Delete**. Deleting a folder will also delete any folders and files contained within it.
6. To copy a folder or file:
    - Select the check box of the folder or file and click **Copy**. The folder(s) and file(s) are placed on the clipboard.
    - Go to the folder into which you want to copy the folder or file and click **Paste**.
7. To move a folder or file:

- Select the check box of the folder or file and click **Cut**. The folder(s) and file(s) are removed from their current location and are placed on the clipboard.
- Go to the folder into which you want to move the folder or file and click **Paste**.

8 To download a file:

- Right-click on the file you want to download. A context menu appears.
- Select “Save Target As...” or “Save Link Target As”. A Save As window appears.
- Browse to the location to which you wish to save the file and click **Save**. The file is saved to the specified location.

Maintaining Database Tables

Advanced Mode

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

If you purge customers or products, and are using StoreSync with QuickBooks Online, you will need to select the **Reset Sync Links** check box on the StoreSync Preferences - QuickBooks Online Integration page. See *Setting Up StoreSync* (page 61) for more information.

To purge information from your database:

1 Browse to **Store** | **Maintenance**. The Maintenance page appears.

2 Under **Purge Database Tables**, select the information you wish to purge.

3 Click **Purge**.

This action *cannot* be reversed.

To purge your search results:

1 Browse to **Store** | **Maintenance**. The Maintenance page appears.

2 Under **Search Results Purge**, enter the number of days for which you wish to save your search results.

3 Click **Purge**.

To purge your store log:

1 Browse to **Store** | **Maintenance**. The Maintenance page appears.

2 Under **Log Purge**, enter the number of months for which you wish to save your log records.

3 Click **Purge**.

Purging your store log will directly affect your ability to generate reports. For example, if this field is set to “6”, you will only be able to report on six months worth of data.

Viewing Server Settings

Advanced Mode

The **Store | Servers** page provides read-only system information regarding your store. This information can be used for support purposes, or to configure products such as StoreSync.

Extending ProStores

You can download utilities to extend the functionality of ProStores, such as StoreSync.

To download utilities:

1 Browse to **Support | Utilities**. The Utilities page appears.

2 Select the utility you wish to download. You will be prompted to install the utility to your local machine.

StoreSync Utility

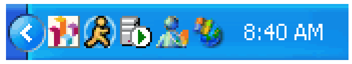
With StoreSync, you can easily start and manage your e-business within the QuickBooks environment. Using the familiar Web browser, you can select StoreSync Setup with a few clicks, and move all the inventory information needed for your online store, as well as your customer lists, into ProStores.

If you are a QuickBooks Online customer, you can synchronize your data without downloading this utility. See *Setting Up StoreSync* (page 61) for more information.

For more information, see the *StoreSync Setup User Guide*.

Store Monitor Utility

The ProStores Store Monitor is a tool that tracks activity in your store, without you having to log on to the store. It works as a Windows System Tray tool, running continuously in the background when you’re logged on to your computer. As long as you have an active Internet connection, it checks periodically to see if any new customers have registered with your store, or if there have been any new orders, and then alerts you.



The Store Monitor is represented by the icon on the left.

You can change the frequency of the alerts, the sound used, and whether or not to load this tool when Windows starts by clicking the icon in the System Tray and selecting **Options**.

Please ensure that your Windows system clock and time zone are set correctly. If they are not, the monitor may not display notifications as expected.

Exporting and Importing Data

ProStores Store Administration allows you to export and import information into the database. This can help you with backing up your data, or with making global updates to your customer or product information.

Exporting Tables

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

To export a table:

1. Browse to **Support | Export**. The Export page appears.
2. Select a table to export from the list.
3. Select a target platform from the list.
4. Click **Export**.
    - Certain tables can be filtered by date ranges or categories - if so, you will be prompted with another page at this time. If this is a date page, select a pre-defined date range, or enter a custom date range. If you do not wish to limit your export by date, select a pre-defined date range of “All”. If this is a category page, select a category from the list, or select “All” to export all categories.
    - If you selected the **QuickBooks format** check box (for Customer or Order tables), the Export for QuickBooks page will appear. Enter the custom QuickBooks categories and accounts information. *(Advanced Edition only)*
    - After selecting any filters or QuickBooks options, click **Export**.
5. The Export Results page appears.
6. To view the status of the export, click the **Review Export Status** link.
7. When the export is complete, click the “click here” link to view the log and download the file to your computer.

Importing Tables

You can import up to 5000 records at a time. To simplify the creation of a *.csv file for importing, you can export a table (or the template from the Help Panel), then open it and add your information to that file. Once you're done and have saved that file, you can then import it.

To import a table:

1. Create your import file. You have several options:
    - ♦ If available, download a template from the Help Panel on **Support | Import**.
    - ♦ Export data using **Support | Export**, and delete all but the first row.
    - ♦ Create the file manually using Excel or a text editor.
2. Browse to **Support | Import**. The Import page appears.
3. Select the table to which you wish to import the file from the list.
4. Browse to the file you wish to import.
5. When importing products, select a method for updating product inventory by selecting one of the options.
6. Click **Import**. If you have a large file, this process may take a while.

The eBay Turbo Lister and eBay File Exchange import require files that have been generated by your eBay store. See *eBay Tools* (page 113) for more information.

Table Types

This section describes each table that may be exported from and/or imported to ProStores.

Customers

Customer Table

Contains customer profile information. May be both exported and imported.

If you are importing the Customer table, you must include a password for each customer. Also, only new customers can be imported.

Column	ProStores Label	Import Notes	Type (Max)
CustomerNo			Int
LastName	Last Name	Required on Add	Char (20)
FirstName	First Name	Required on Add	Char (20)
Company	Company		Char (30)
Street	Street	If validation enabled	Char (30)
Street2	Street2		Char (30)
City	City	If validation enabled	Char (20)

Column	ProStores Label	Import Notes	Type (Max)
State	State/Province	If validation enabled	Char (20)
Zip	Postal Code	If validation enabled	Char (10)
Country	Country		Char (20)
Phone	Home Phone		Char (20)
Phone2	Work Phone		Char (20)
Phone3	Mobile Phone		Char (20)
Fax	Home Fax		Char (20)
Fax2	Work Fax		Char (20)
Pager	Pager		Char (25)
Email	E-mail	Required on Add	Char (50)
Email2	E-mail CC	Advanced Edition only	Char (50)
Resale	Resale Number	Advanced Edition	Char (20)
AuthAllowed	Authorization	Required on Add, Advanced Edition only	Boolean
Notify	Wishes to be contacted by store.	Required on Add	Boolean
Since	Customer Since		Date
ExtText1	Custom Field 1	Advanced Edition only	Char (50)
ExtText2	Custom Field 2	Advanced Edition only	Char (50)
ExtText3	Custom Field 3	Advanced Edition only	Char (50)
ExtText4	Custom Field 4	Advanced Edition only	Char (50)
ExtText5	Custom Field 5	Advanced Edition only	Char (50)
ExtText6	Custom Field 6	Advanced Edition only	Char (50)
ExtText7	Custom Field 7	Advanced Edition only	Char (50)
ExtText8	Custom Field 8	Advanced Edition only	Char (50)
GroupName	Customer Group	Customer Group must already be defined before import. Customer Plus only	String

Import Only Columns

Column	ProStores Label	Import Notes	Type (Max)
Password	Password	Required on Add	Char (30)
DeptNo	Department Order	Advanced Edition only	Char (20)
PONo	Purchase Order	Advanced Edition only	Char (20)
DeptEmail	Department Email	Advanced Edition only	Char (50)
POLimit	PO Limit	Advanced Edition only	Money

Products

Products Table

Contains product profile information. May be both exported and imported.

Importing the product table will update category associations and create new categories if they do not already exist.

Column	ProStores Label	Import Notes	Type (Max)
ProductNo		Required on Update; Cannot be modified on update	Sequence
Product	Product	Required on Add	Char (355)
SKU	SKU/Item No		Char (20)
OEM	OEM		
Supplier	Supplier	Advanced Edition only	
ProductType	Product Type	Advanced Edition only	SmallInt
Price	Sell Price	Required on Add	Money
PriceRetail	Retail Price	Advanced Edition only	Money
Cost	Cost	Advanced Edition only	Money
Taxable	Taxable	Required on Add	Boolean
Surcharge	Surcharge	Advanced Edition only	Money
SurchargeTitle	Invoice Text	Advanced Edition only	Char (50)
Shipping	Shipping	Advanced Edition only	Money
ShippingExemptInd	Exclude from Shipping	Required on Add, Advanced Edition only	Boolean
Quantity	Quantity		Integer
Unit	Unit	Advanced Edition only	Char (10)
Threshold	Threshold	Advanced Edition only	Integer
Weight	Weight		Double
Length	Length		Double
Height	Height		Double
Width	Width		Double
ContainerCode	Container		Char (10)
Brief	Brief		Text
Description	Description		Text
Subscription	Subscription	x	Boolean
Attribute1Label	Label		Char (5,000)
Colors	Colors		Char (5,000)
Attribute2Label	Label		Char (5,000)
Sizes	Sizes		Char (5,000)
Thumbnail	Thumbnail		Char (50)
Photo	Photo		Char (50)
Template	Catalog Detail Template		Char (50)
ExtText1	Custom Field 1	Advanced Edition only	Char (75)
ExtText2	Custom Field 2	Advanced Edition only	Char (75)
ExtText3	Custom Field 3	Advanced Edition only	Char (75)
ExtText4	Custom Field 4	Advanced Edition only	Char (75)

Column	ProStores Label	Import Notes	Type (Max)
ExtText5	Custom Field 5	Advanced Edition only	Char (75)
ExtText6	Custom Field 6	Advanced Edition only	Char (75)
Active	Show in Catalog	Required on Add	Boolean
AuthReq	Authorization	Required on Add, Advanced Edition only	Boolean
ISBN	ISBN		String
MPN	Manufacturer Product Number		String
Condition	Condition		Boolean
Media	Media		Boolean
NaturalSearchKeywords	Natural Search Keywords		Char
NaturalSearchDescription	Natural Search Description		Char
Category	Category	Format - category:subcategory:subcategory	
Keywords	Keywords		

Import Only Columns

Column	ProStores Label	Import Notes	Type (Max)
CustomOrder	Order Extensions	Required on Add, Advanced Edition only	Boolean
OrderTemplate	Order Extensions Template	Advanced Edition only	Char (50)
CustomService1Enabled	Gather (1)	Required on Add, Advanced Edition only	Boolean
CustomService2Enabled	Gather (2)	Required on Add, Advanced Edition only	Boolean
Subscription	Subscription Product	Required on Add, Advanced Edition only	Boolean
CustomService1Fee	Fee (1)	Advanced Edition only	Money
CustomService1Title	Title (1)	Advanced Edition only	Char (20)
CustomService2Fee	Fee (2)	Advanced Edition only	Money
CustomService2Title	Title (2)	Advanced Edition only	Char (20)

Products Table - Tab Delimited

Contains product profile information in a tab-delimited format. See *Products Table* (page 168) for more information.

Product Attributes Table

(Advanced Edition only)

Contains product attribute profile information. May be both exported and imported.

Column	ProStores Label	Import Notes	Type (Max)
AttributeID		Required on Update; Cannot be modified on update	ID
ProductNo		Required on Add; Cannot be modified on update	
SKU	SKU		Char (20)
ProductColor	Color	Required on Add	Char (50)
ProductSize	Size	Required on Add	Char (50)
Price	Price		Money
Cost	Cost		Money
Quantity	Quantity		Integer
Unit	Unit		Char (10)
Weight	Weight		Double
Length	Length		Double
Height	Height		Double
Width	Width		Double
ContainerCode	Container		Char (10)
PaymentInterval	Subscription/Payment Interval		Integer
SubscriptionPeriod	Subscription Period		Integer
IntervalBegin	Interval Begins		Char (1)
NewBillType	New Subscription		Char (1)
StartupFee	Startup Fee		Money
RenewUpdateInd	Renewal		Boolean
ISBN	ISBN		String
MPN	Manufacturer Product Number		String
Condition	Condition		Boolean
Media	Media		Boolean

Product Quantity Discount Promotion Table

Contains product quantity discount promotion information. May be both exported and imported.

Column	ProStores Label	Import Notes	Type (Max)
PromotionConfigNumber		Required on Update; Cannot be modified on update	Sequence
ProductNumber		Required; Cannot be modified on update	
AttributeId	Product	Required on Add; Cannot be modified on update	ID
Code	Promotion Code		Char (10)
Name	Promotion Name	Required. To delete on import, enter “Delete” in this column	Char (100)

Column	ProStores Label	Import Notes	Type (Max)
InvoiceText	Invoice Text		Char (100)
StartDate	Start Date		Date
EndDate	End Date		Date
ActiveInd	Active?		Boolean
ExclusiveInd	Exclusive?		Boolean
Priority			Integer
DiscountAmount	Discount Amount	Required on Add	Integer
DiscountType	Discount Type	Required on Add. Valid values are currency, percent and pricediscount.	String
MinimumQuantity	Minimum Quantity		Integer
MaximumQuantity	Maximum Quantity		Integer
MaxUse	Maximum Use (across all customers)		Integer
OneTimeUseInd	Limit		Boolean

Product Sale Table

Contains product sale promotion information. May be both exported and imported.

Column	ProStores Label	Import Notes	Type (Max)
PromotionConfigNumber		Required on Update; Cannot be modified on update	Sequence
ProductNumber	Product Number	Required; Cannot be modified on update	Integer
AttributeId	Attribute No		ID
Code	Promotion Code		Char (10)
Name	Promotion Name	Required. To delete on import, enter "Delete" in this column	Char (100)
InvoiceText	Invoice Text		Char (100)
StartDate	Start Date		Date
EndDate	End Date		Date
ActiveInd	Active?		Boolean
ExclusiveInd	Exclusive?		Boolean
Priority			Integer
Sale	Sale Price	Required on Add	Currency

Product Serial Number Table

(Advanced Edition only)

Contains serialized inventory information. May be both exported and imported.

Column	ProStores Label	Import Notes	Type (Max)
ProductNo		Required on Add/Update	Integer
Product			String
Serial1	Serial No 1	Required on Add	Char (50)
Serial2	Serial No 2		Char (50)

Related Products Table

(Advanced Edition only)

Contains related product information. May be both exported and imported.

Column	ProStores Label	Import Notes	Type (Max)
ProductNo		Required	Integer
Product	Product	Required	Char (255)
RelatedProductNo		Required	Integer
RelatedProduct	Related Product	Required. To delete on import, enter “Delete” in this column.	Char (255)

Orders

Credits Table

Contains credit details. Export only.

Column	ProStores Label
CreditNo	Credit Number
InvoiceNo	Invoice Number
Date	Invoice Date
LastName	Customer Last Name
FirstName	Customer First Name
Email	Customer e-mail address
Street	Customer Payment Street 1
Street2	Customer Payment Street 2
City	Customer Payment City
State	Customer Payment State/Province
Zip	Customer Payment Postal Code
Country	Customer Payment Country
CustomerNo	Customer Number
Company	Customer Company
Phone	Customer Phone
SubTotal	SubTotal
TotalShippingTax	Shipping Tax
TotalStateTax	State Tax
TotalCountyTax	County Tax
TotalDistrictTax	District Tax
Shipping	Shipping
Total	Total
ResaleInd	Resale Indicator
StoreCredit	Store Credit
PaymentMethod	Payment By
CreditCard	Credit Card Name
Note	Invoice Note
ItemNo	Item No
ItemSKU	Item SKU
ItemQty	Qty
ItemWeight	Weight

Column	ProStores Label
ItemSize	Size
ItemColor	Color
ItemSupscriptionPeriod	Subscription Period
ItemPaymentInterval	Payment Interval
ItemPrice	Price
ItemTotal	Total

Orders Table

Contains orders detail. Export only.

Column	ProStores Label
InvoiceID	Invoice ID
InvoiceNo	Invoice Number
EnterDate	Order Date
ShipDate	Ship Date
CustomerNo	Customer Number
Company	Customer Company
Phone	Customer Phone
LastName	Customer Last Name
FirstName	Customer First Name
Email	Customer E-mail address
Street	Customer Payment Street 1
Street2	Customer Payment Street 2
City	Customer Payment City
State	Customer Payment State/Province
Zip	Customer Payment Postal Code
Country	Customer Payment Country
Recipient	Recipient
ShipStreet	Recipient Shipping Street
ShipStreet2	Recipient Shipping Street 2
ShipCity	Recipient Shipping City
ShipState	Recipient Shipping State/Province
ShipZip	Recipient Shipping Postal Code
ShipCountry	Recipient Shipping Country
Items	Items
Weight	Weight
SubTotal	SubTotal
TotalShippingTax	Shipping Tax
TotalStateTax	State Tax
TotalCountyTax	County Tax
TotalDistrictTax	District Tax
Tax	Tax
PromoDiscount	Promotion Discount
Shipping	Shipping
ShipMethod	Shipping Method
Total	Total
ResaleInd	Resale Indicator
PaymentMethod	Payment By
CreditCard	Credit Card
AuthInd	Authorized
Status	Status
PromotionCode	Promotion Code
ItemNo	Item No
ItemSKU	Item SKU
ItemQty	Qty
ItemWeight	Weight
ItemSize	Size
ItemColor	Color
ItemSupscriptionPeriod	Subscription Period
ItemPaymentInterval	Payment Interval
ItemPrice	Price
ItemTotal	Total
Supplier Notified	Supplier Notified
ShipDate	Ship Date

Column	ProStores Label
Supplier Invoice	Supplier Invoice
Supplier Total	Supplier Total
Ship Qty	Ship Qty
Supplier Price	Supplier Price
PONo	Purchase Order Number
Affiliate	Affiliate Details

Order Extensions Table

(Advanced Edition only)

Contains order extension details. Export only.

Column	ProStores Label
InvoiceNo	Invoice Number
OrderNo	Order Number
ProductNo	Product Number
ItemSKU	SKU
ExtText1	Custom Field 1
ExtText2	Custom Field 2
ExtText3	Custom Field 3
ExtText4	Custom Field 4
ExtText5	Custom Field 5
ExtText6	Custom Field 6
ExtText7	Custom Field 7
ExtText8	Custom Field 8
ExtText9	Custom Field 9

Order Tracking Table

Contains ship tracking details. Export only.

Column	ProStores Label
InvoiceNo	Invoice Number
OrderNo	Order Number
SequenceNo	Sequence Number
TrackingNo	Tracking Number

Manufacturers

Manufacturer Table

Contains Manufacturer profile information. May be both exported and imported.

Column	ProStores Label	Import Notes	Type (Max)
OEMID		Required on Update; Cannot be modified on update	ID
OEM	Manufacturer	Required on Add	Char (50)
URL	URL		Char (250)
Logo	Logo		Char (50)
Template	Template		Char (50)
Description	Description		Text

Suppliers

(Advanced Edition only)

Supplier Table

Contains supplier profile information. May be both exported and imported.

Column	ProStores Label	Import Notes	Type (Max)
SupplierID	n/a	Required on Update; Cannot be modified on update	ID
Supplier	Supplier	Required on Add	Char (50)
Contact	Contact	n/a	Char (50)
Street	Street	Required on Add	Char (30)
Street2	Street2	n/a	Char (30)
City	City	Required on Add	Char (20)
State	State/Province	Required on Add	Char (20)
Zip	Postal Code	Required on Add	Char (10)
Country	Country	n/a	Char (20)
Phone	Phone	n/a	Char (20)
Fax	Fax	n/a	Char (20)
Email	E-mail	n/a	Char (50)
URL	URL	n/a	Char (50)
SendMethod	Method	Required on Add	Small Integer
SendGroup	Group By	Required on Add	Small Integer
SendTemplate	Template	Required on Add	Char (20)
SendShip	Mark as Shipped	Required on Add	Boolean
Suffix	Suffix	n/a	Char (5)
SuffixInd	Append Suffix	Required on Add	Boolean

Sales

(Advanced Edition, Sales Manager module only)

Affiliates Table

Contains affiliate profile information. Export only.

Column	ProStores Label
AffiliateNo	n/a
Affiliate	Affiliate
Contact	Contact
Street	Street
Street2	Street2
City	City
State	State/Province
Zip	Postal Code

Column	ProStores Label
Country	Country
Phone	Phone
Fax	Fax
Email	E-mail
URL	URL
Resale	Resale No
Commission	Commission Rate
ReferralPeriod	Referral Period

Affiliate Sales Table

Contains information regarding sales that came via affiliates. Export only.

Column	ProStores Label
AffiliateNo	Number
Affiliate	Affiliate
Referrals	Referrals

Column	ProStores Label
TotalSales	Total Sales
Rate	Rate
Commission	Commission

Sales Leads Table

Contains sales lead information. Export only.

Column	ProStores Label
LastName	Last Name
FirstName	First Name
Company	Company
Street	Street
Street2	Street2
City	City
State	State/Province
Zip	Postal Code
Country	Country
Phone	Phone
Fax	Fax
Email	E-mail
Product	Product
Since	Date Submitted

Column	ProStores Label
Sales Person Last Name	Assigned To
Sales Person First Name	Assigned To
ExtText1	Custom 1
ExtText2	Custom 2
ExtText3	Custom 3
ExtText4	Custom 4
ExtText5	Custom 5
ExtText6	Custom 6
ExtCheck1	Check 1
ExtCheck2	Check 2
ExtCheck3	Check 3
ExtCheck4	Check 4
ExtCheck5	Check 5
ExtCheck6	Check 6

Troubleshooting Importing Tables

General Import Issues:

- It is highly recommended that you export a table - or its template from the Help Panel - first, and then update it with the information you want to import. This ensures that the column headings match the database perfectly.
- Once you've exported a table or downloaded an import file, *never* change the names of the column headings.
- Check your import file for any unusual characters (such as hollow squares). These characters can cause an import to fail.

If you are having trouble importing product information, check for the following:

- If you are importing a product that already exists in your database, you must include the existing product's number in the **ProductNo** column.
- If you are receiving a warning that a supplier/manufacturer does not exist for a product, the product information has been imported. However, you will need to enter the supplier/manufacturer, and then add that information to the products that have been imported.

Backing Up Your Store

While there is no tool to formally back up a store, there are ways to save the information you have stored in ProStores to files that can then be backed up using your favorite backup utility.

Files that can be exported and backed up using Store Administration include:

- Images and Files: use the **Support Manager | File Management** function, or if available, FTP access.
- Templates: In Store Design > Page Template Manager, select the **Store Version** from the pull-down menu, select the check box for each template(s) to export, and then select **Export Page Template** from the **More Actions...** pull-down menu.
- Product, Order, Customer and other store information: use the Support Manager > Export function.

Files that **cannot** be exported include:

- Shipping Zone Tables
- Sales Tax Tables

Chapter 11: Reporting

The Report Manager provides summary level and detailed reports that can be used to analyze the success of your store.

Running Reports

To create a report:

1. Browse to **Report**. The Report Manager page appears.
2. Click one of the report links.
   - *Executive Reports* (page 179)
   - *Product Statistics Report* (page 186)
   - *Category Statistics Report* (page 187)
   - *Sales Reports* (page 187)
   - *Cost of Inventory Report* (page 193) *(Advanced Edition only)*
3. Select a report from the list.
4. Some reports require you to choose a specific product or category. If so, select the item from the list.
5. Choose a pre-defined date range or enter a custom date range.

   You will only be able to report on the data contained in your store log. If your store log is set to only retain data for six months, you will only be able to generate reports on the past six months of data. Contact your Site Administrator for more information.

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

When printing the report, you may want to hide the ProStores Explorer. To do so, click on the ProStores Explorer. When you are done printing, click on the toolbar to display the ProStores Explorer.

Report Descriptions

Executive Reports

Best Sellers Report

Lists the top 20 selling products.

Headings:
- **Product:** the product name.
- **Manufacturer:** the manufacturer of the product.
- **Sales:** total sales for the product.
- **Quantity:** the number of products sold.

Sorting: Quantity, descending.

Subtotals: None

Best Sellers

All Transactions

Product	Manufacturer	Sales	Qty
Family Photo with Deco Frame	Chez Ethan	$542.75	11
Pulley	Tool Depot	$682.50	11
Scissors	Tool Depot	$38.30	10
Survey Bulb	Tool Depot	$360.0	5
Dining Room Lithograph with Frame	Chez Ethan	$511.75	5
Baby Doll	Dollw	$112.00	4
Curved Wrench	Dollmania	$53.46	4
Hand Wr	Dollmania	$140.66	3
Faux Frame with Picture	FrameORama	$113.61	3
Fishing Lure	Outdoor Zone	$23.85	3
Folding Yardstick	Tool Depot	$195.06	3
Kitty Doll	Dollywood	$73.95	3
Profile Antique Photo	FrameORama	$42.75	3
Fruit of the Month		$36.89	2
Oval Family Lithograph	Big Box Furnishings	$91.20	2

Best Sellers Report

Customer Top 20 Report

Lists the top 20 customers in terms of purchases made.

Headings:
- **Customer:** the customer name.
- **Sales:** total sales for the customer.
- **Quantity:** number of products the customer has purchased.

Sorting: Customer last name, ascending.

Subtotals: None.

Customer Top 20

All Transactions

Customer	Sales	Quantity
Christie, Joe	$1,428.32	2
Jacob, Holly	$927.32	1
Coatney, Lonnie	$745.46	1
Bloom, Jane	$737.80	1
Crago, Ted	$555.73	1
E, Sam	$380.75	1
Alix, Kathrine	$121.77	1
Doud, Amie	$114.91	1
Doe, Barry	$109.16	1
Craine, Clayton	$80.89	1
Contrary, Donald	$76.49	1
Craig, Ross	$57.85	1
Zaldivar, Kurt	$40.14	1
Scuderi, Ted	$16.29	1

Customer Top 20 Report

Least Visited Products Report

Highlights the top 20 least visited products in your store. In order to appear on the report, a product must have been visited at least once.

Headings:
- **Product:** the product name.
- **Page Views:** the number of times the product's detail page was viewed.

Sorting: Page Views, ascending.

Subtotals: None.

Least Visited Products

All Transactions

Product	Page Views
Doorknob	1
Fan	2
Folding Yardstick	2
Baby Doll	2
Distinguished Gentleman Picture	2
Gold Leaf Picture Frame	2
Mirror	2
Mo[illegible] Lady Photograph	2
Vintage Floor Lamp	2
Wrench	2
Wrench Pro	2
Family Photo with Deco Frame	3
Doggie Doll	4
Fancy Girl Doll	4
Bronzed Baby Shoes	4

Least Visited Products Report

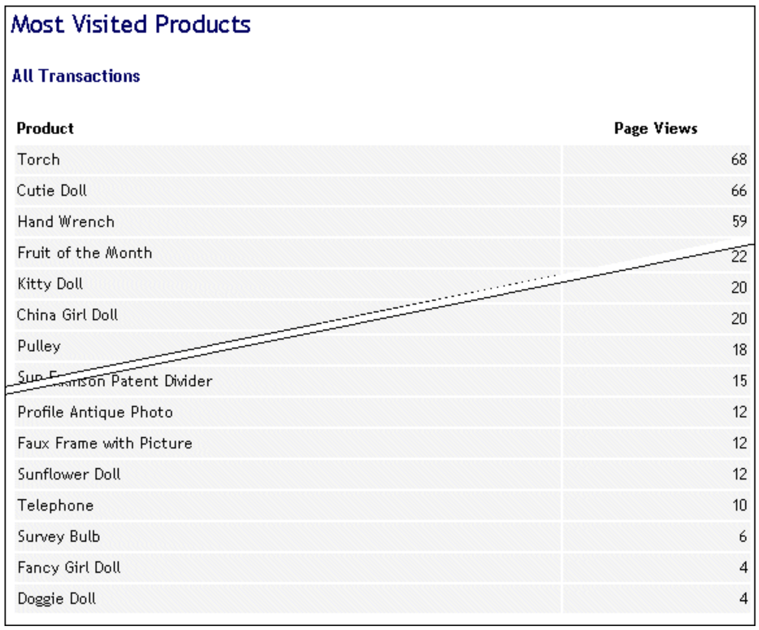
Most Visited Products Report

Highlights the top 20 most visited products.

Headings:
- **Product:** the product name.
- **Page Views:** the number of times the product's detail page was viewed.

Sorting: Page Views, descending.

Subtotals: None.


Most Visited Products

All Transactions

Product	Page Views
Torch	68
Cutie Doll	66
Hand Wrench	59
Fruit of the Month	22
Kitty Doll	20
China Girl Doll	20
Pulley	18
Sun [illegible]nson Patent Divider	15
Profile Antique Photo	12
Faux Frame with Picture	12
Sunflower Doll	12
Telephone	10
Survey Bulb	6
Fancy Girl Doll	4
Doggie Doll	4

Most Visited Products Report

Orders/Visits Ratio Report

Details the order and visit activity for a store.

Headings:
- **Total Orders:** total number of orders that have been confirmed by a customer, shipped, ready for shipping, or are pending authorization.
- **Total Sales:** total sales for the store.
- **Total Credits:** total credits applied against invoices.
- **Total Net Sales:** Total Sales minus Total Orders.
- **Average Order Amount:** Total Net Sales divided by Total Orders.
- **Total Margin Sales:** Total Sales minus Total Credits, shipping and credits.
- **Total Costs:** total cost of inventory for purchased products.
- **Total Carts:** total number of carts created.
- **Total Abandoned Carts:** total number of carts where the cart expired. Expired carts means the visitor took no action on the cart for the period of time specified in Store Manager | General Preferences, **Cart Available** field (for example, the visitor added items to the cart, but never checked out).

- **Percentage of Carts Abandoned:** Total Abandoned Carts divided by Total Carts.
- **Value of Abandoned Carts:** the total of all abandoned cart's "Estimated Total."
- **Total Unconfirmed Orders:** total number of cancelled orders (meaning, the customer checked out, but clicked **Cancel** on the Invoice page).
- **Total Visitors:** The number of visitors to a store. A "visit" is defined as a search conducted by a unique IP address on a "per day" basis. If that IP address conducts multiple searches in one day, that is only counted as one visit.
- **Percentage of Visits Resulting in Orders:** Total Orders divided by Total Visitors.
- **New Customer Orders:** number of orders from new customers.
- **Returning Customer Orders:** number of orders from existing customers.

Sorting: n/a.

Subtotals: Percentages and Subtotals based on each group of information.

Order/Visit Ratios

All Transactions

Description	Amount
Total Orders	15
Total Sales	$5,392.88
Total Credits	($913.60)
Total Net Sales	**$4,479.28**
Average Order Amount	$298.62
Total Margin Sales*	$3,993.46
Total Costs	$2,852.58
Total Margin	**$1,140.88**
Total Carts	17
Total Abandoned Carts	2
Percentage of Carts Abandoned	11.765%
Value of Abandoned Carts	$59.98
Total Unconfirmed Orders	21
Value of Unconfirmed Orders	$3,750.08
Total Visitors	5
Percentage of Visits Resulting in Order	300.000%
New Customer Orders	14
Returning Customer Orders	1

* Total Margin Sales represents total sales less credits, shipping, and taxes.

Orders/Visits Ratio Report

Search Summary Report

Provides insight into your customer's searches and whether or not they were successful or not in finding the information they wanted. You can use these reports to identify the products for which your customers are searching, and also what they are *not* finding.

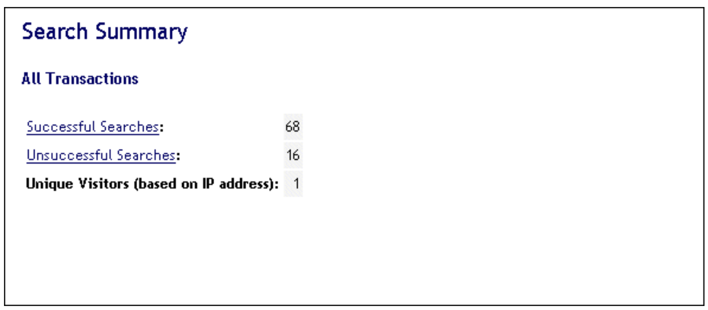
The first report displayed will be the **Search Summary**. Click one of the links to view detail on successful or unsuccessful searches.

Headings:

- **Category:** if the search was by category name, the category selected or typed in by the visitor appears here.
- **Product:** if the search was by product name, the product selected or typed in by the visitor appears here.
- **Manufacturer:** if the search was by manufacturer, the manufacturer selected or typed in by the visitor appears here.
- **Keyword:** any keywords entered by the visitor.
- **# Searches:** the number of searches that used these criteria.

Sorting: # Searches, descending.

Subtotals: Total of all searches.



Search Summary

Successful Searches

All Transactions

Category	Product	Manufacturer	Keyword	No.
				3
			family	1
			frame	1
			fruit	5
			hand wrench	1
			mirror	1
all				1
all			china doll	
all			frame	1
all				2
all		Dollmania		1
all	frame	all		1
all	wrench			1
Dolls and Figurines				14
Fresh Fruit				3
Hand Tools				4
Household Collectables				5
Outlet				1
Photographs and Frames				4
Tools				2
			Total Searches:	**68**

Search Summary | Successful Searches | Unsuccessful Searches

Search Summary, Successful Searches

Unsuccessful Searches

All Transactions

Category	Product	Manufacturer	Keyword	No.
			cats	1
			dogs	1
			fruit	1
			glass	1
all			frame glass	1
all			frame wood	1
all			glass	1
all		doll haven	china doll	1
all		hasbro		1
all	baby	Dollmania		1
all	baby doll	Dollmania		1
all	dollmania			1
all	frame	all		1
all	glass			1
all	gold	Dollywood		1
Fresh Fruit			dogs	1
			Total Searches:	**16**

Search Summary | Successful Searches | Unsuccessful Searches

Search Summary, Unsuccessful Searches

Worst Sellers Report

Lists the bottom 20 selling products.

Headings:
- **Product:** the product name.
- **Manufacturer:** the manufacturer of the product.
- **Sales:** total sales for the product.
- **Quantity:** the number of products sold.

Sorting: Quantity, descending.

Subtotals: None.

Worst Sellers

All Transactions

Product	Manufacturer	Sales	Qty
Distinguished Gentleman Picture	Big Box Furnishings	$17.06	1
JD Wilkinson Patent Divider	FrameORama	$337.25	1
Oil Can	Tool Depot	$29.92	1
Ornate Multi Frame	Big Box Furnishings	$23.85	3
Fruit of the Month		$195.06	3
Oval Family Lithograph	Dollywood	$73.95	3
Cutie Doll [illegible] Photo	FrameORama	$42.75	3
Mirror	Linen House	$112.00	4
Monkey Doll	Dollmania	$53.46	4
Baby Doll	Dollywood	$125.00	5
Curved Wrench	Tool Depot	$308.75	5
Hand Wrench	Tool Depot	$511.50	5
Lithograph X	Chez Ethan	$99.75	5
Saw	Tool Depot	$511.75	5
Dining Room Lithograph with Frame	Chez Ethan	$312.00	8

Worst Sellers Report

Product Statistics Report

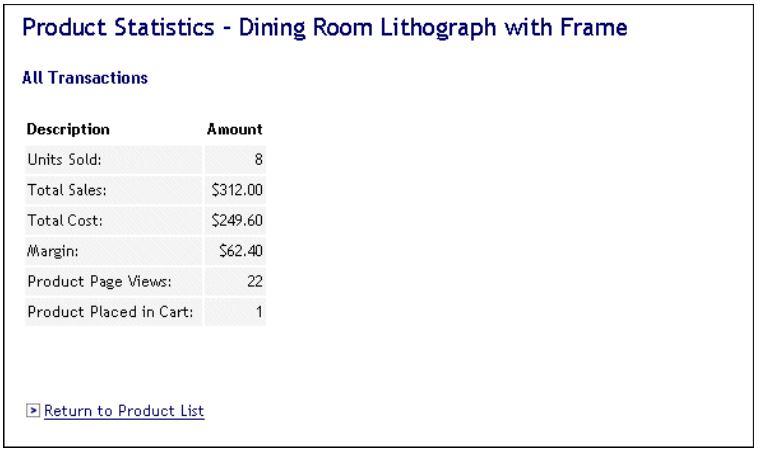
Shows individual product statistics.

Search for a specific product by entering its name in the Product Statistics page. All products matching your search criteria will appear in a products listing. Select a product to view its Product Statistics report

Headings:
- **Units Sold:** amount of product sold.
- **Total Sales:** total sales for this product.
- **Total Cost:** total cost of all sold products.
- **Margin:** Total Sales minus Total Cost.
- **Page Views:** number of times the product detail page was viewed by visitors to the store.
- **Products Placed in Cart:** number of times the product was added to a cart.

Sorting: n/a.

Subtotals: None.



Product Statistics - Dining Room Lithograph with Frame

All Transactions

Description	Amount
Units Sold:	8
Total Sales:	$312.00
Total Cost:	$249.60
Margin:	$62.40
Product Page Views:	22
Product Placed in Cart:	1

Return to Product List

Product Statistics Report

Category Statistics Report

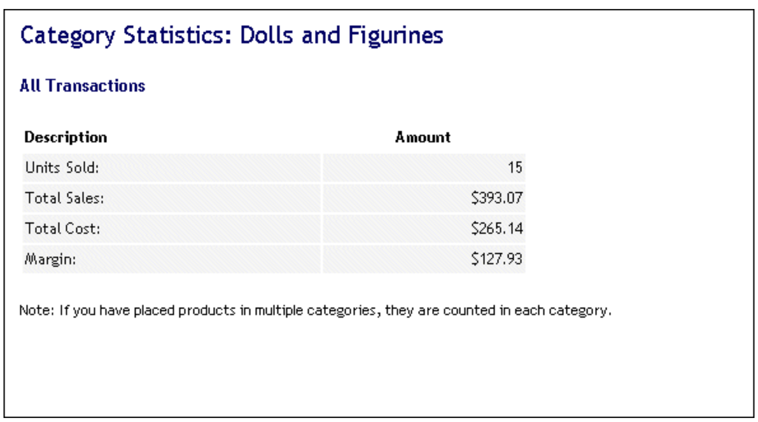
Shows statistics for sales by category. If you have placed products in multiple categories, they are counted in each category.

Headings:

- **Units Sold:** number of products sold that were assigned to this category.
- **Total Sales:** total sales of all products sold in this category.
- **Total Cost:** total cost of all products sold in this category.
- **Margin:** Total Sales minus Total Cost.

Sorting: n/a.

Subtotals: None



Category Statistics: Dolls and Figurines

All Transactions

Description	Amount
Units Sold:	15
Total Sales:	$393.07
Total Cost:	$265.14
Margin:	$127.93

Note: If you have placed products in multiple categories, they are counted in each category.

Category Statistics Report

Sales Reports

Order Log Report

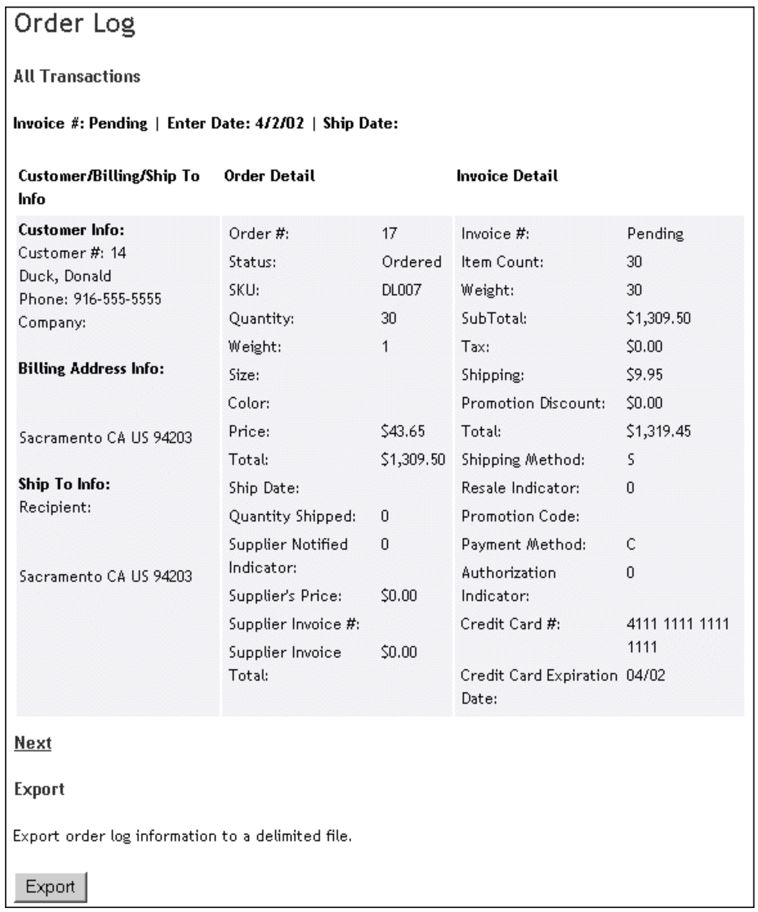
Displays detailed activity and information for an order, including any customer credit information.

You can export the report to a delimited file by clicking **Export**. Doing so will open a window asking you to save the file to disk.

Headings:
- **Customer Info:** contains basic customer information.
- **Payment Address Info:** contains the customer's payment address.
- **Ship To Info:** contains the shipping address for this invoice.
- **Order Detail:** detailed information regarding the order, including quantity, shipping status, and supplier information.
- **Invoice Detail:** detailed information regarding the invoice, including totals and payment method information.

Sorting: Invoice number, ascending.

Subtotals: None



Order Log Report

Promotions Report

(Advanced Edition only)

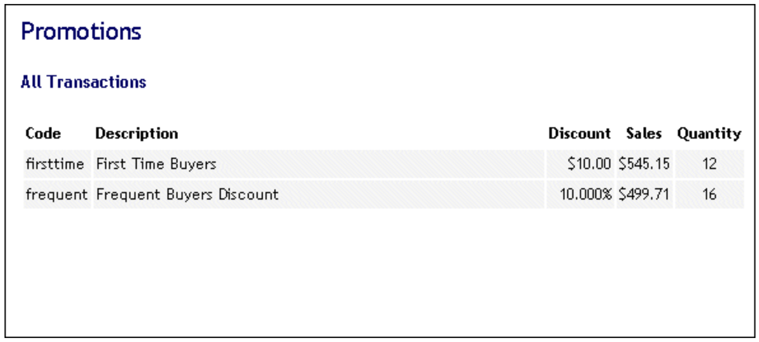
Sales summary of product promotions for the date range selected.

Headings:
- **Promotion Code:** the code assigned to this promotion.
- **Description:** the description of the promotion.

- **Discount:** the discount applied by the promotion.
- **Sales:** total sales that used this promotion code.
- **Quantity:** total number of times the promotion code was used.

Sorting: Promotion Code, ascending.

Subtotals: None.



Promotions

All Transactions

Code	Description	Discount	Sales	Quantity
firsttime	First Time Buyers	$10.00	$545.15	12
frequent	Frequent Buyers Discount	10.000%	$499.71	16

Promotions Report

Sales by Category Report

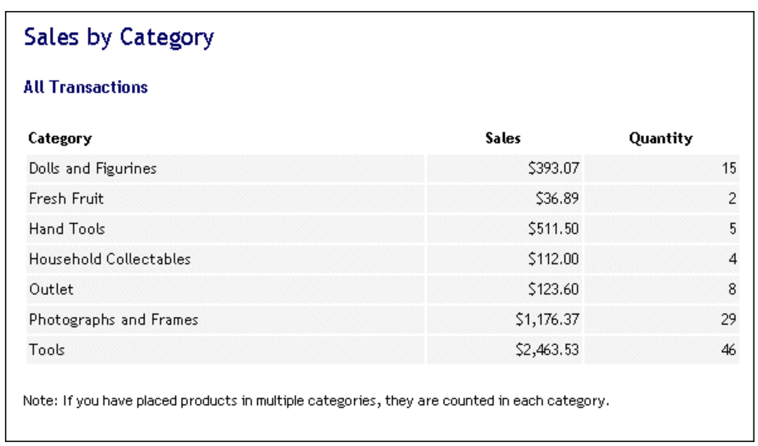
Shows sales by category for the date range selected. If products are placed in multiple categories, they will be counted in each category.

Headings:

- **Category:** the name of the category.
- **Sales:** total sales for all products assigned to this category.
- **Quantity:** total number of products sold in this category.

Sorting: Category, ascending.

Subtotals: None.



Sales by Category

All Transactions

Category	Sales	Quantity
Dolls and Figurines	$393.07	15
Fresh Fruit	$36.89	2
Hand Tools	$511.50	5
Household Collectables	$112.00	4
Outlet	$123.60	8
Photographs and Frames	$1,176.37	29
Tools	$2,463.53	46

Note: If you have placed products in multiple categories, they are counted in each category.

Sales by Category Report

Sales by Customer Report

(Advanced Edition only)

Displays sales by customer.

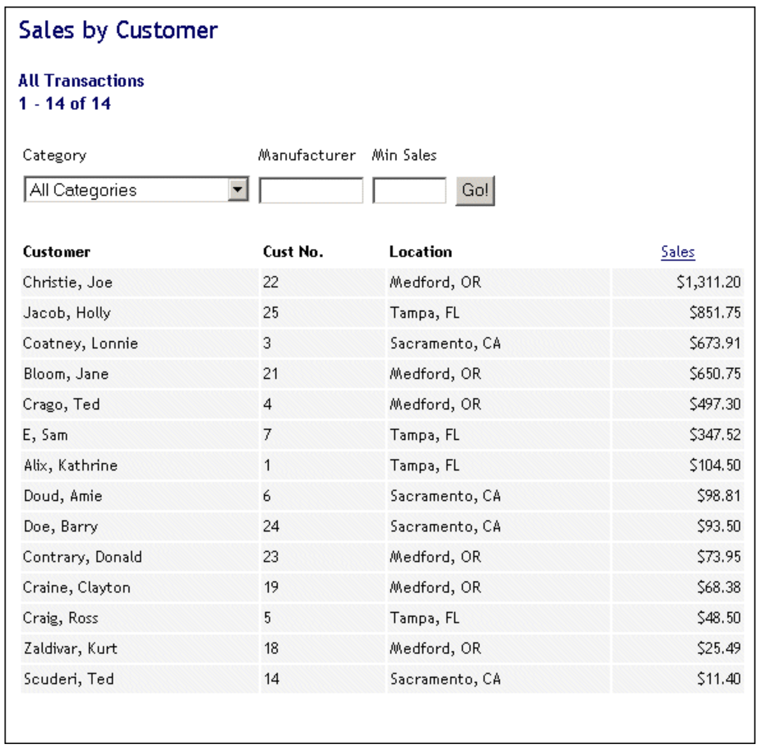
To narrow the search results, select a product category, manufacturer or minimum sales amount and click **Go**.

Headings:

- **Customer:** the name of this customer. If there is a **Company Name** for the customer, it will appear below the customer name.
- **Customer #:** the unique customer number.
- **Location:** the city and state/province of this customer.
- **Sales:** total sales for all products purchased by this customer. Does not include any credits applied to the customer.

Sorting: Defaults to customer last name, ascending. Click the **Sales** link to sort by Sales Amount.

Subtotals: None.



Sales by Customer

All Transactions
1 - 14 of 14

Category: All Categories | Manufacturer | Min Sales | Go!

Customer	Cust No.	Location	Sales
Christie, Joe	22	Medford, OR	$1,311.20
Jacob, Holly	25	Tampa, FL	$851.75
Coatney, Lonnie	3	Sacramento, CA	$673.91
Bloom, Jane	21	Medford, OR	$650.75
Crago, Ted	4	Medford, OR	$497.30
E, Sam	7	Tampa, FL	$347.52
Alix, Kathrine	1	Tampa, FL	$104.50
Doud, Amie	6	Sacramento, CA	$98.81
Doe, Barry	24	Sacramento, CA	$93.50
Contrary, Donald	23	Medford, OR	$73.95
Craine, Clayton	19	Medford, OR	$68.38
Craig, Ross	5	Tampa, FL	$48.50
Zaldivar, Kurt	18	Medford, OR	$25.49
Scuderi, Ted	14	Sacramento, CA	$11.40

Sales by Customer Report

Sales by Customer Group Report

(Advanced Edition, Customer Plus module only)

Displays sales by customer group.

Headings:

- **Group:** the name of the group.
- **Description:** the description of the group.
- **Sales:** total sales of all products purchased by customers assigned to this group.
- **Quantity:** total number of products purchased by customers assigned to this group.

Sorting: Customer group, ascending.

Subtotals: None.

Sales by Customer Group

All Transactions

Group	Description	Sales	Quantity
Frequent Buyers	For our best customers	$1,889.51	58
Doll Collectors	For those who love dolls	$2,967.45	59

Sales by Customer Group Report

Sales by Product Report

Shows sales by product for the date range selected.

Headings:

- **Product:** the product name.
- **SKU:** the product SKU.
- **Manufacturer:** the manufacturer assigned to the product.
- **Sales:** total sales for this product.
- **Quantity:** total quantity sold.

Sorting: Product name, ascending.

Subtotals: None.

Sales by Product

All Transactions
1 - 24 of 24

Product	SKU	Manufacturer	Sales	Quantity
Baby Doll	DL002-fs	Dollywood	$125.00	5
Curved Wrench	TL011	Tool Depot	$308.75	5
Cutie Doll	DL007	Dollmania	$140.66	3
Dining Room Lithograph with Frame	FR009	Chez Ethan	$312.00	8
Distinguished Gentleman Picture	FR004	Big Box		3
		Chez Ethan	$99.75	5
Family Photo with Deco Frame	FR00	Linen House	$112.00	4
Faux Frame with Pi	DL001	Dollmania	$53.46	4
Can	TL003	Tool Depot	$29.92	1
Ornate Multi Frame	FR001	Big Box Furnishings	$57.00	1
Oval Family Lithograph	FR010	Big Box Furnishings	$91.20	2
Profile Antique Photo	FR005	FrameORama	$42.75	3
Pulley	TL004	Tool Depot	$682.50	11
Saw	TL006	Tool Depot	$511.75	5
Scissors	TL007	Tool Depot	$38.30	10
Survey Bulb	TL008	Tool Depot	$360.00	10

Sales by Product Report

Sales by Manufacturer Report

Shows sales by manufacturer for the date range selected.

Headings:
- **Manufacturer:** the manufacturer name.
- **Sales:** total sales for all products assigned to this manufacturer.
- **Quantity:** total number of products sold for this manufacturer.

Sorting: Manufacturer, ascending.

Subtotals: None.

Sales by Manufacturer

All Transactions

Manufacturer	Sales	Quantity
Unknown	$36.89	2
Big Box Furnishings	$165.26	4
Chez Ethan	$954.50	24
Dollmania	$194.12	7
Dollywood	$198.95	8
FrameORama	$493.61	7
Linen House	$112.00	4
Outdoor Zone	$23.85	3
Tool Depot	$2,637.78	50

Sales by Manufacturer Report

Sales Tax Report

Summary of the sales tax you have collected for the date range specified.

Headings:
- **Tax Nexus:** the tax region.
- **Gross/Credits Sales:** total sales and credits for this nexus.
- **Gross/Credits Tax:** total tax applied to this nexus.

Sorting: Tax Nexus, ascending.

Subtotals: Each Tax Nexus.

Sales Tax

All Transactions

Tax Nexus		Sales	Tax
US:CA:Sacramento	Gross	$877.62	$72.41
	Credits	$0.00	$0.00
	Total	**$877.62**	**$72.41**
US:FL:Hillsborough	Gross	$1,337.27	$93.62
	Credits	($48.50)	($3.40)
	Total	**$1,288.77**	**$90.22**
US:OR:Jackson	Gross	$2,602.07	$130.11
	Credits	($815.00)	($40.75)
	Total	**$1,787.07**	**$89.36**

Sales Tax Report

Cost of Inventory Report

(Advanced Edition only)

Shows the cost of inventory by individual product. You must enter a cost in the product's profile for this report to work

Search for a specific product by entering its name on the Product Statistics page. All products matching your search criteria will appear in a products listing. Select a product to view its Cost of Inventory report. Click the product name again to view product information.

Headings:
- **Product:** the name of the product.
- **Quantity:** the total number of product in stock.
- **Unit Cost:** the cost of each product.
- **Total:** Quantity times Unit Cost.

Sorting: n/a

Sorting: None.

Cost of Inventory

Baby Doll

Product	Quantity	Unit Cost	Total
Baby Doll	5000	$15.00	$75,000.00
Baby Doll (Full-Size)	4995	$15.00	$74,925.00
Baby Doll (Miniature)	5000	$15.00	$75,000.00

Return to Product List

Cost of Inventory Report

Chapter 12: Advanced Sales Management

(Advanced Edition, Sales Manager module only)

ProStores allows you to track sales leads, manage a sales team, and develop an affiliates program, using its Sales Manager module.

This chapter will discuss the concepts behind sales management, and provide instructions for implementing these programs.

Setting Up an Affiliates Program

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

Setting up a Sales Affiliates program requires several steps, including:

1. Set up the default commissions and referral periods for your affiliate program. See *Setting Affiliate Defaults* (page 196) for more information.
2. If necessary, edit the Sales Affiliate and Sales Affiliate Confirm templates. These are the pages that potential affiliates will use to register for your program.
3. The Sales Affiliate Confirm template provides examples of the links your affiliates should place on their pages. The standard format is

```
<a href="http://yourstoreurl/StoreFront.bok?affiliate_no=##"></a>
```

   (where ## refers to their Affiliate ID). In order for your affiliates to receive credits for their referrals, they must link to your site using this format.

   If an affiliate does not have a web site, they may make referrals to your store by providing the link to your site in an e-mail message to potential customers. The customer would then click the link to your site from within the e-mail.

4. If you are using a theme that was shipped with ProStores, the "Become an Affiliate" link will appear automatically in your storefront. If not, or if that code has been removed, you will need to add the code below to a prominent template (like the Header, Footer or Storefront templates).
5. If necessary, use the Sales Affiliates area to manually add new affiliates, or to update existing affiliates. See *Maintaining Sales Affiliates* (page 196) for more information.
6. Use the Affiliate Sales Summary report (in the Sales Manager) to determine the commissions you owe to your affiliates. See *Affiliate Sales Summary Report* (page 203) and *Affiliate Sales by Affiliate Report* (page 202) for more information.

```
<ss:if test="$store.isFeatureEnabled('ShowAffiliateLink')">
  <ss:link source="$templateSet.affiliate">Become an Affiliate</ss:link>
</ss:if>
```

Setting Affiliate Defaults

You can set default information for all new sales affiliates. This helps to ensure that affiliates who sign up online have the correct information set for them.

To set affiliate defaults:

1. Browse to **Sales** | **Affiliates** | **Defaults**. The Affiliate Defaults page appears.
2. Enter the default commission rate for all new affiliates in **Commission Rate**.
3. Enter the default length of time between the time a customer clicks the affiliate referral link and actually buys a product, within which the affiliate will receive credit for the purchase, in **Referral Period**.
4. If you want the “Become an Affiliate” link to appear in the storefront (allowing affiliates to register online), select the **Show Affiliate Link** check box. This will cause the link to appear on either the Header or Footer template. If not, or if that code has been removed, you will need to add the code below to a prominent template (like the Header, Footer or Storefront templates).
5. Click **Submit** to save your work.

```
<ss:if test="$store.isFeatureEnabled('ShowAffiliateLink')">
  <ss:link source="$templateSet.affiliate">Become an Affiliate</ss:link>
</ss:if>
```

Viewing Sales Affiliates

To view a list of sales affiliates:

- To quickly view a list of all affiliates, browse to **Sales** | **Affiliates**. A list of all affiliates will be displayed.

Or...

1. Browse to **Sales** | **Affiliates List**. The Affiliates List page appears.
2. Type the starting characters of the affiliate’s name and click .

   To list all affiliates, click without entering any characters in the field.

3. A list of affiliates matching your search criteria appears.

Maintaining Sales Affiliates

To add an affiliate:

1. Browse to **Sales** | **Add**. The Add Affiliate page appears.
2. Enter the information in each field. See *Field Help: Sales Affiliates* (page 197) for more information.
3. Click **Submit** to save your work.

Affiliates may also register using the storefront if the **Become an Affiliate** link is enabled for your store.

To update an affiliate:

1. View a listing of your affiliates. See *Viewing Sales Affiliates* (page 196) for more information.
2. Click the affiliate you wish to edit.
3. Edit the information in each field. See *Field Help: Sales Affiliates* (page 197) for more information.
4. Click **Submit** to save your work.

To delete a sales affiliate:

1. View a listing of your affiliates. See *Viewing Sales Affiliates* (page 196) for more information.
2. Select the check boxes of the affiliates you wish to delete.
3. Click **Delete**.

Field Help: Sales Affiliates

Basic Information

Field	Description
Affiliate Information	Enter the affiliate's name, contact, address, phone, e-mail and web information.
Resale Number	If this affiliate is eligible to purchase products without having sales tax applied, enter their resale number.

Commission and Referral Information

Field	Description
Commission Rate	If applicable, enter the commission rate this affiliate is to receive.
Referral Period	The period between the time a customer clicks the affiliate referral link and actually buys a product, within which the affiliate will receive credit for the purchase.

Building a Sales Team

Advanced Mode

The Sales Manager module allows you to manage and track your team. You can track all your team members, their sales targets and regions, and then run detailed sales tracking reports.

Viewing the Team

To view a list of your entire team, browse to **Sales | Team**. The View Sales Team page appears. Listed are the names of the sales people, their managers, and the manager's region.

To view a list of Sales Managers, browse to **Sales | Team | View Managers**. The View Sales Managers page appears. Listed are the names of the sales managers, and their region.

Maintaining Sales Managers

To add a sales manager:

1. Browse to **Sales** | **Team** | **Add Sales Mgr**. The Add Sales Manager page appears.
2. Enter the sales manager's first and last name, and their region.
3. Click **Submit** to save your work.

To update a sales manager:

1. Browse to **Sales** | **Team** | **View Managers**. The View Sales Managers page appears. Listed are the names of the sales managers and their region.
2. Click the sales manager you wish to update.
3. Edit the information in each field.
4. Click **Submit** to save your work.

To delete a sales manager:

1. Browse to **Sales** | **Team** | **View Managers**. The View Sales Managers page appears. Listed are the names of the sales managers, and their region.
2. Select the check boxes of the managers you wish to delete.
3. Click **Delete**.

Maintaining Sales People

To add a sales person:

1. Browse to **Sales** | **Team** | **Add Sales Person**. The Add Sales Person page appears.
2. Enter the sales person's first and last name, their initials (used by some accounting and contact software), and select a sales manager from the list.
3. Click **Submit** to save your work.

To update a sales person:

1. Browse to **Sales** | **Team**. The View Sales Team page appears. Listed are the names of the sales people, and their region.
2. Click the sales person you wish to update.
3. Edit the information in each field.
4. Click **Submit** to save your work.

To delete a sales person:

1 Browse to **Sales** | **Team**. The View Sales Team page appears. Listed are the names of the sales people and their region.
2 Select the check boxes of the persons you wish to delete.
3 Click **Delete**.

Managing Leads

Advanced Mode

Leads are customers who have expressed interest in a product that is not available for sale using your web storefront. Sales Leads are generated when a customer selects a product whose **Product Type** field is set to “Lead” (in the Product Manager), and enters information allowing you to contact them.

Developing a Leads Program

The lead generation process is set up as follows:

1 Identify those products that you wish to display in your storefront, but that you do *not* wish to sell online (instead, the actual sale will be made via a follow up contact).
2 Add or edit your lead products, making sure the **Product Type** field is set to “Lead.” See *Maintaining Product Profiles* (page 89) for more information.
3 If you wish to collect custom information for your lead products, set up your Lead Custom Fields. See *Setting Up Lead Custom Fields* (page 199) for more information.
4 If you wish to assign leads to your sales team based on geographical rules, set up your Lead Assignment Rules. See *Setting Up Lead Assignment Rules* (page 200) for more information.
5 When a customer searches for and selects a lead product and then either clicks an **Add to Cart** or **For More Information** button, they will be presented with the Sales Lead form that will collect contact information. You can edit the “Sales Lead” template to customize this form.
6 Once the customer submits that form, the lead will appear in the **Sales Lead** listing. See *Working with Sales Leads* (page 201) for more information.

Setting Up Lead Custom Fields

This feature allows you to create custom fields that gather lead information.

To set up custom fields:

1 Browse to **Sales** | **Leads** | **Custom Fields**. The Custom Fields page appears.
2 If you want these fields to appear in the storefront (to display collect lead information), select the **Show Custom Fields** check box. This will cause any custom

fields that you define to appear on the Sales Lead template. If the fields do not appear, enter the code displayed below on that template.

3 Enter the custom check box titles.

4 Enter the custom text field titles.

5 Click **Submit** to save your work.

```
<ss:if test="$store.isFeatureEnabled('ShowSalesLeadCustomFields')">
<table>
  <ss:if test="$store.leads.customTextLabel1">
  <tr>
    <td><ss:value source="$store.leads.customTextLabel1"/>:</td>
    <td><ss:edit source="$lead.customText1"/></td>
  </tr>
  </ss:if>
  <ss:if test="$store.leads.customTextLabel2">
  <tr>
    <td><ss:value source="$store.leads.customTextLabel2"/>:</td>
    <td><ss:edit source="$lead.customText2"/></td>
  </tr>
  </ss:if>
  [repeat for each custom field...]
</table>
</ss:if>
```

Setting Up Lead Assignment Rules

Use this feature to assign a salesperson to new leads based on the customer's state. Existing customers are automatically assigned to the sales person selected in their customer profile, if any.

If an existing customer does *not* have a sales person assigned to them, and they complete a lead generation form, that lead will be assigned to a sales person using lead assignment rules. However, their customer profile will not be updated with that salesperson.

To set up lead assignment rules:

1 Browse to **Sales | Leads | Rules**. The Lead Custom Rules page appears.

2 Under **Add Rule**, enter the standard postal abbreviation for the state or province (two capital letters), and select a sales person from the list.

3 Click **Submit**. The rule is added to the **Current Rules** list.

To remove a rule:

1 Browse to **Sales | Leads | Rules**. The Lead Custom Rules page appears.

2 Under **Current Rules**, select the check boxes for those rules you wish to delete.

3 Click **Delete**.

Working with Sales Leads

To work with sales leads:

1. Browse to **Sales | Leads**. The View Sales Leads page appears. Listed are the lead names, their primary product interest, the date they were added to the list, and the sales person assigned to the lead.
   - To view more details regarding a lead, click the lead name. See *Field Help: Sales Leads* (page 201) for more information.
   - To assign a sales person to this lead, click the lead name, select a sales person from the list, and click **Submit**.
   - To delete a sales lead, select the check box next to it and click **Delete**.

Field Help: Sales Leads

Assign Lead

Field	Description
Assigned To	If this is a new customer, select a sales person from the list and click **Submit**. Existing customers are automatically assigned to the sales person selected in their customer profile, if any.

Review Lead

This section contains information regarding the lead, including customer responses to any Lead Custom Fields.

Viewing Reports

Advanced Mode

Running Sales Reports

Once you have defined your team and affiliates, you can run reports that will help you manage your sales efforts.

To run a sales report:

1. Browse to **Sales | Reports**.
2. Select the report you wish to run from the list.
3. Select a date range for the report.
4. Click **Go** to run the report.

Report Descriptions

Sales Reports

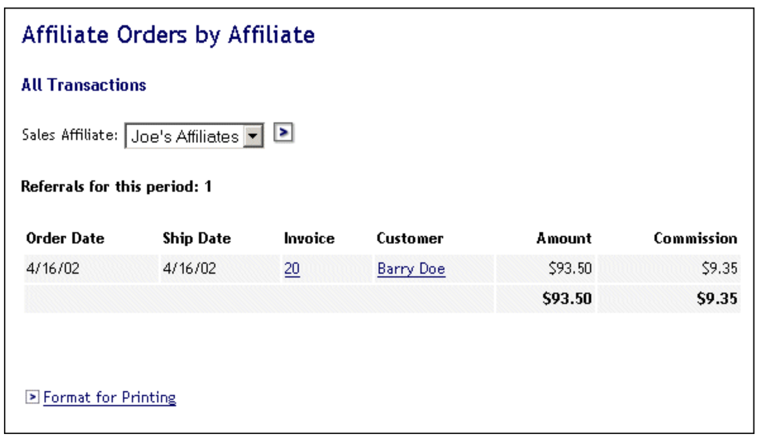
Affiliate Orders by Affiliate Report

Displays all completed orders by affiliate. The initial report will not display any information until you select a sales person and click .

Headings:
- **Order Date:** date the order was placed.
- **Ship Date:** date the order was shipped.
- **Invoice:** invoice number.
- **Customer:** customer name.
- **Amount:** invoice total.
- **Commission:** equals **Amount** times the commission rate set in the affiliate profile.

Sorting: Order date, ascending.

Subtotals: Total order amounts and commissions.



Affiliate Orders by Affiliate Report

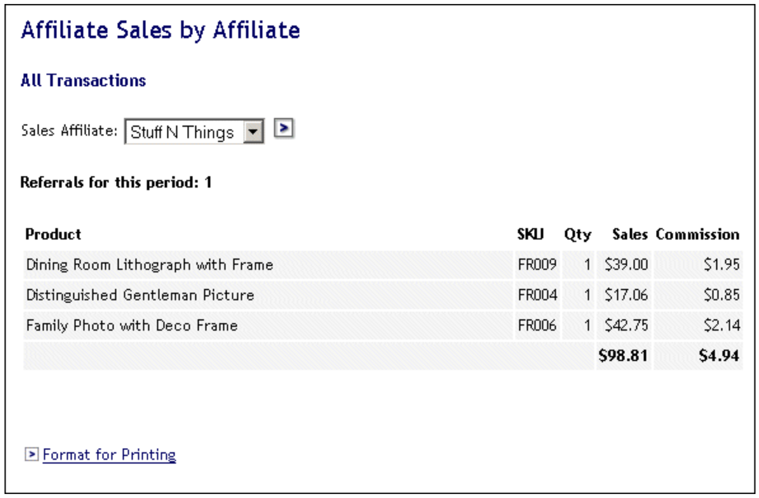
Affiliate Sales by Affiliate Report

Displays itemized sales by Sales Affiliate for the date range selected. The initial report will not display any information until you select a sales person and click .

Headings:
- **Product:** product name.
- **SKU:** the product SKU.
- **Quantity:** total number of products purchased by customers who came from an affiliate link.
- **Sales:** total sales made by customers who came from an affiliate link.
- **Commissions:** commission due to the affiliate. Equals Sales times the commission rate set in the affiliate profile.

Sorting: Product name, ascending.

Subtotals: Total Sales and Commissions.



Affiliate Sales by Affiliate Report

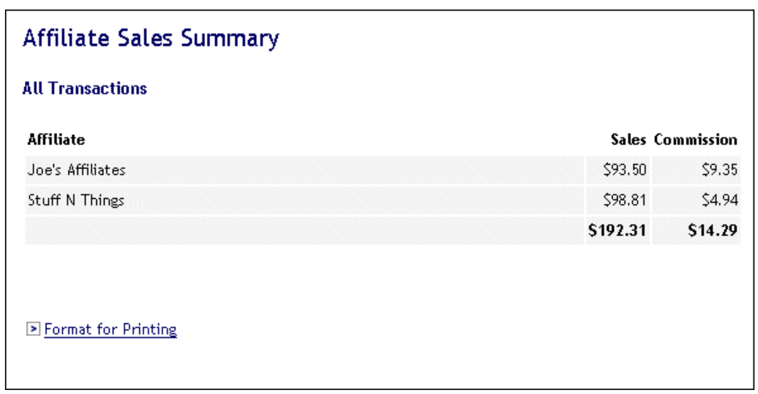
Affiliate Sales Summary Report

Displays total sales and commissions per affiliate for the date range selected.

Headings:
- **Affiliate:** the name of the affiliate.
- **Sales:** total sales made by customers who came from an affiliate link.
- **Commission:** commission owed to the affiliate. Equals Sales times the commission rate set in the affiliate profile.

Sorting: Affiliate name, ascending.

Subtotals: Total Sales and Commissions.



Affiliate Sales Summary Report

Category Sales by Sales Person Report

Shows category sales by sales person for the date range selected. The initial report will not display any information until you select a sales person and click .

Headings:
- **Category:** the name of the category.
- **Subcategory:** the name of the subcategory.
- **Quantity:** total number of products assigned to this category that were purchased by customers assigned to this sales person.

- **Sales:** total sales of products assigned to this category to customers assigned to this sales person.

Sorting: Category name, ascending.

Subtotals: Total Sales.

Category Sales by Sales Person

All Transactions

Sales Person: Bojangles, Jennifer

Category	Subcategory	Quantity	Sales
Dolls and Figurines	Porcelain	3	$73.95
Fresh Fruit		1	$11.40
Hand Tools	Wrenches	1	$104.50
Outlet		3	$23.85
Photographs and Frames		3	$113.61
Tools		3	$195.06
			$522.37

Note: If you have placed products in multiple categories, they are counted in each category.

Category Sales by Sales Person Report

Product Sales by Sales Person Report

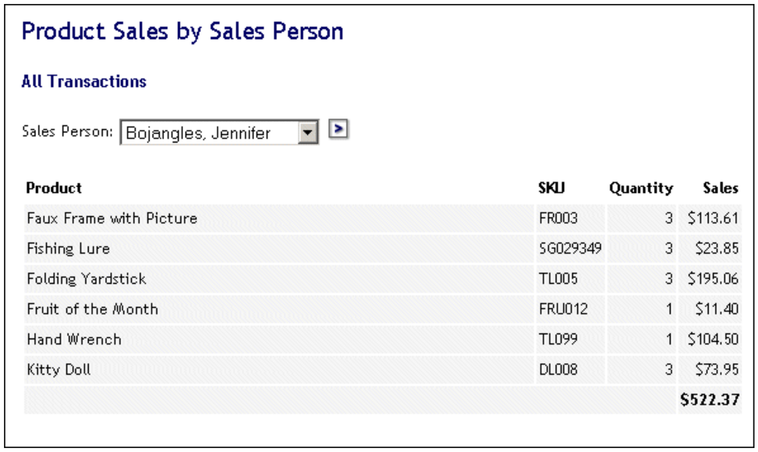
Shows product sales by sales person for the date range selected. The initial report will not display any information until you select a sales person and click .

Headings:

- **Product:** the name of the product.
- **SKU:** the SKU of the product.
- **Quantity:** total number of products purchased by customers assigned to this sales person.
- **Sales:** total sales of this product to customers assigned to this sales person.

Sorting: Product name, ascending.

Subtotals: Total Sales.



Product Sales by Sales Person

All Transactions

Sales Person: Bojangles, Jennifer

Product	SKU	Quantity	Sales
Faux Frame with Picture	FR003	3	$113.61
Fishing Lure	SG029349	3	$23.85
Folding Yardstick	TL005	3	$195.06
Fruit of the Month	FRU012	1	$11.40
Hand Wrench	TL099	1	$104.50
Kitty Doll	DL008	3	$73.95
			$522.37

Product Sales by Sales Person Report

Total Sales by Sales Person Report

Shows sales target by sales person for the selected date range.

Click the sales person's name to view their sales by customer. Then click the customer's name in that report to view the customer's order history during the date range selected. From this location, you can link directly to the customer's complete order history.

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

Headings:

- **Sales Person:** the name of the sales person.
- **Sales Manager:** the sales manager to which this sales person is assigned.
- **Orders:** number of orders made by customers assigned to this sales person.
- **Sales:** total sales for customers assigned to this sales person.

Sorting: Sales person last name, ascending.

Subtotals: Total Orders and Sales.

Total Sales by Sales Person

All Transactions

Sales Person	Sales Manager	Orders	Sales
Bojangles, Jennifer	Smith, Steve	4	$595.30
Franklin, Jill	Peterson, Elizabeth	6	$3,758.33
Gogetter, Michael	Smith, Steve	3	$212.90
Paul, Gennie	Peterson, Elizabeth	2	$826.35
		15	**$5,392.88**

Total Sales by Sales Person Report

Total Sales for Sales Person

All Transactions

Bojangles, Jennifer

Customer	Orders	Sales
Alix, Kathrine	1	$121.77
Contrary, Donald	1	$76.49
E, Sam	1	$380.75
Scuderi, Ted	1	$16.29
	4	**$595.30**

Total Sales by Sales Person Report, Detail

Total Sales by Sales Manager Report

Shows sales by sales manager for the date range selected.

Headings:
- **Sales Manager:** the name of the sales manager.
- **Orders:** number of orders made by customers assigned to this manager's sales people.
- **Sales:** totals sales to customers assigned to this manager's sales people.

Sorting: Sales Manager last name, ascending.

Subtotals: Total Orders and Sales.

Total Sales by Sales Manager

All Transactions

Sales Manager	Orders	Sales
Peterson, Elizabeth	8	$4,584.68
Smith, Steve	7	$808.20
	15	**$5,392.88**

Total Sales by Sales Manager Report

Target Reports

Sales Target by Sales Person Report

Shows sales target by sales person for the selected date range.

Headings:
- **Sales Person:** the name of the sales person.
- **Sales Target:** the sales target for the sales person.
- **Total Sales Dollars:** total sales made by customers assigned to this sales person.

Sorting: Sales person last name, ascending.

Subtotals: Total Sales.

Sales Target by Sales Person

This Quarter (4/1/02 - 6/30/02)

Sales Person	Target	Sales
Bojangles, Jennifer	$6,250.00	$595.30
Franklin, Jill	$6,250.00	$3,758.33
Gogetter, Michael	$6,250.00	$212.90
Paul, Gennie	$6,250.00	$826.35
		$5,392.88

Sales Target by Sales Person Report

Sales Target by Sales Manager Report

Shows sales target by sales manager for the selected date range.

Headings:
- **Sales Manager:** the name of the sales manager.
- **Sales Manager Region:** the region entered in the sales manager's profile.
- **Sales Target:** the sales target for the sales manager.
- **Total Sales Dollars:** total sales for purchases made by customers assigned to the manager's sales people.

Sorting: Sales manager last name, ascending.

Subtotals: Total Sales.

Sales Target by Sales Manager

This Quarter (4/1/02 - 6/30/02)

Sales Manager	Region	Target	Sales
Peterson, Elizabeth	Southern States	$12,500.00	$4,584.68
Smith, Steve	Western States	$25,000.00	$808.20
			$5,392.88

Sales Target by Sales Manager Report

Chapter 13: Participating in a Mall

If your Site Administrator supports it, the Mall module increases your visibility to potential customers by providing a central location for them to search multiple stores. Features include:

- Giving your store visibility in a central "mall" store.
- Allowing customers to quickly register and checkout at all stores in a single mall.

This chapter will describe how malls work, and steps to complete to maximize your participation in a mall.

Understanding How Malls Work

The Mall acts much like a physical shopping mall - it contains a variety of stores, allowing the shopper access to a larger number of products than if they were to shop at a stand-alone store.

The customer shops at the mall store, searching for products in all stores that participate in that mall. They can also search for specific stores.

When a customer finds a product or store, they complete the purchase at the participating store. That order will be processed by the merchant just like any other order.

One important feature of participating in a mall is that information about the customer is "owned" by the mall store - not the individual stores. This allows the customer to shop at multiple stores without having to re-enter their customer information each time. In addition, Mall participants can only edit demographic information if the Mall Store has enabled that option. Please see your Site Administrator for more information.

Mall Settings for Mall Participants

If your Site Administrator has set up a Mall, and you have purchased the Mall Module, you can now display your products in the Mall Store. See *Understanding How Malls Work* (page 208) for more information.

Please contact your Site Administrator for more information regarding Mall participation.

To do so:

1. Browse to **Store** | **Mall Participation**. The Mall Participation page appears.
2. Enter a **Description** of your store that mall customers can view.

3 Enter the name of the image to be used when displaying information regarding your store in the mall. This image needs to be uploaded to your store images directory. See *Uploading Images* (page 18) for more information.

4 Select the **Classification** in which your store should be contained. This will help customers find your store.

5 Click **Submit** when done. You store and its products will now be included in the Mall.

Chapter 14: Upgrading Store Administration

This section describes the upgrade options available for your store.

To upgrade your store, click the **Upgrade** button on the toolbar.

Upgrading the Business Edition Store

If you have a Business Edition store, you have the following upgrade options:

- Purchase the Advanced Edition: the **ProStores Advanced Edition** offers all the functionality of the Business Edition, plus inventory and customer management.

Upgrading the Advanced Edition Store

If you have a Advanced Edition store, you have the following upgrade options:

- Customer Plus: Allows you to assign customers to different "buyer groups" and provide different pricing based on the assigned group; create a frequent buyer club; and give discounts based on a percent off the sales price or a percentage above cost.
- Sales Manager: Allows you to create your own affiliate program; gather sales leads by product; define and track sales managers, sales people and affiliates; view sales activity by month, quarter, or year; automatically assign a salesperson to a lead; and assign salespeople to customers.
- Supplier Connect: Allows you to view pending orders by supplier, even if the order spans multiple suppliers; notify suppliers of orders by e-mail, EDI or fax; and based on the shipping confirmation, separate partial orders for special handling.

Downgrade Implications

When you downgrade from one edition to another, the functionality of the first edition will be lost.

For example, if you downgrade from the Advanced Edition to the Business Edition, the you will no longer have custom fields, inventory will no longer be available, and the store will not have the rest of the ProStores Advanced Edition features. Also, all ProStores Advanced Edition object expressions will not resolve. All of the Advanced Edition templates will still be available in the ProStores Store Design, though, they cannot be displayed or used in the storefront.

However, the configuration of the Advanced Edition store will still be in the database. Therefore, if a Advanced Edition store has inventory set for products and is downgraded, the inventory functionality is no longer available. However, if the store is then upgraded back to the Advanced Edition, the inventory numbers previously stored will appear once again.

Appendix A: Glossary

alt attributes

An attribute and value added to an <img> or <ss:image> tag that describes the image (and can be viewed by a visitor when they "mouse over" the image). For example, `<ss:image source="$product.photoImage" alt="$product.description"/>` will display the product description when the visitor mouses over the product's photo image.

attribute

A property or characteristic of a tag. Most tags require at least one attribute. For example, in `<ss:image source="$product.photoImage"/>`, *source* is an attribute of the <ss:image/> tag.

background color

A color that fills an area (either the entire web page area, or just a portion of it).

background pattern

An image (GIF or JPEG) that fills an area (either the entire web page area, or just a portion of it).

baseline templates

Saves a copy of all the templates in a store version.

browser

An application that allows you to look at and interact with the World Wide Web. Examples of browsers include Microsoft Internet Explorer, Netscape Navigator, and Mozilla FireFox.

cart

Contains any items the shopper has expressed interest in purchasing.

catalog

Contains all product information, and can be searched by the shopper.

cookie

Information that a web site puts on a user's local computer so that it can remember something about them at a later time. Typically, a cookie records preferences when using a particular site.

css (Cascading Style Sheets)

Provides the formatting definitions (such as font, colors, etc) for a web page.

customer

A person who has shopped at your store.

domain name

Locates an organization or other entity on the Internet. For example, http://www.mystore.com/.

e-commerce

The buying and selling of goods and services on the Internet.

encryption

The conversion of data into a form (cipher text), that cannot be easily understood by unauthorized people.

ftp (File Transfer Protocol)

A method of exchanging files over the internet. Often used to upload images and files from a local machine to a storefront.

gif

One of the two most common file formats for graphic images on the World Wide Web. The other is the JPEG.

handlebars

Small boxes that surround a selected object.

hexadecimal colors

A system of identifying colors that uses a six-character combination of numbers and letters. For example, white is represented by "#FFFFFF", black is represented by "#000000" and silver is represented by "#c0c0c0".

html (Hypertext Markup Language)

The set of code and symbols used to tell a browser how to display a page on the World Wide Web.

jpeg

One of the two most common file formats for graphic images on the World Wide Web. The other is the GIF.

merchant

The store owner.

merchant account

An account that allows the store to accept credit cards as a method of payment.

meta tag

An HTML tag that describes some aspects of the contents of a Web page. Typically used by search engines to help potential visitors find your site.

multimedia

The combination of text, sound, and/or motion video. For example, music and Flash files are considered multimedia.

object expression

An SSML object expression defines where data is coming from, or the data to which input will be posted. Object expressions always start with the "$" character. For example, in `<ss:image source="$product.photoImage"/>`, $product.photoImage is the object expression which points to a product's photo image.

pixel

The basic unit of programmable color on a computer display or in a computer image. The physical size of a pixel depends on how the resolution has been set for the display screen.

publish templates

The act of applying any changes to a template to your "live" storefront.

reset templates

The act of reverting your templates to the last saved baseline.

shopping cart

See "cart".

spider

A program that visits Web sites and reads their pages and other information in order to create entries for a search engine index.

splash page

A page that greets your customers before they go to your main storefront. Splash pages can also serve as the page that "spiders" can catalog (although not all spiders will catalog splash pages).

ssl (Secure Sockets Layer)

SSL is a Secure Sockets Layer that provides security in transferring data over the Internet, forming a layer of encryption between the server and client. This is particularly important in a commerce situation, as the shopper is providing merchants with their personal information and often with their credit card number.

ssml (ProStores Markup Language)

A combination of tags and object expressions that allow you to work with information from a store.

url

The "address" of a web page. For example, both http://www.mystore.com/ and http://www.stores.com/mystore/ are URLs.

visitor

Someone who has browsed your store, but has not necessarily purchased anything.

wysiwig

“What you see is what you get”. WYSIWIG editing allows you to edit web pages while having an idea of how they’ll look. Source code editing only allows you to see and work with the code behind a web page. ProStores Store Design offers a WYSIWIG editing mode.

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