ProStores
Quick Start Guide

Version 8.1

Table of Contents

Step 1: Meet ProStores

Welcome to ProStores Quick Start! This tutorial is designed to get your store open for business and selling over the Internet as soon as possible.

ProStores Inc. recommends that you follow each of the steps in the order they are presented.

Additional Documents

Before you begin, download and print the ProStores Store Administration User Guide and Designer's Reference. These are available by:

Clicking the **Online Guide** link in Store Administration, and then clicking one of the user guide links.

Clicking the **Help** link in Store Design, and then clicking one of the user guide links in the **PDF** section of the Articles and Other Useful Information page.

The Online Guide (for store administration) and the online Help (for store design) will provide you with the information you need to quickly learn and use ProStores. In addition, clicking ⊘ will bring up a window with help on entering information in the fields just below it.

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.

Explorer   **System Notice**   **Help Panel**
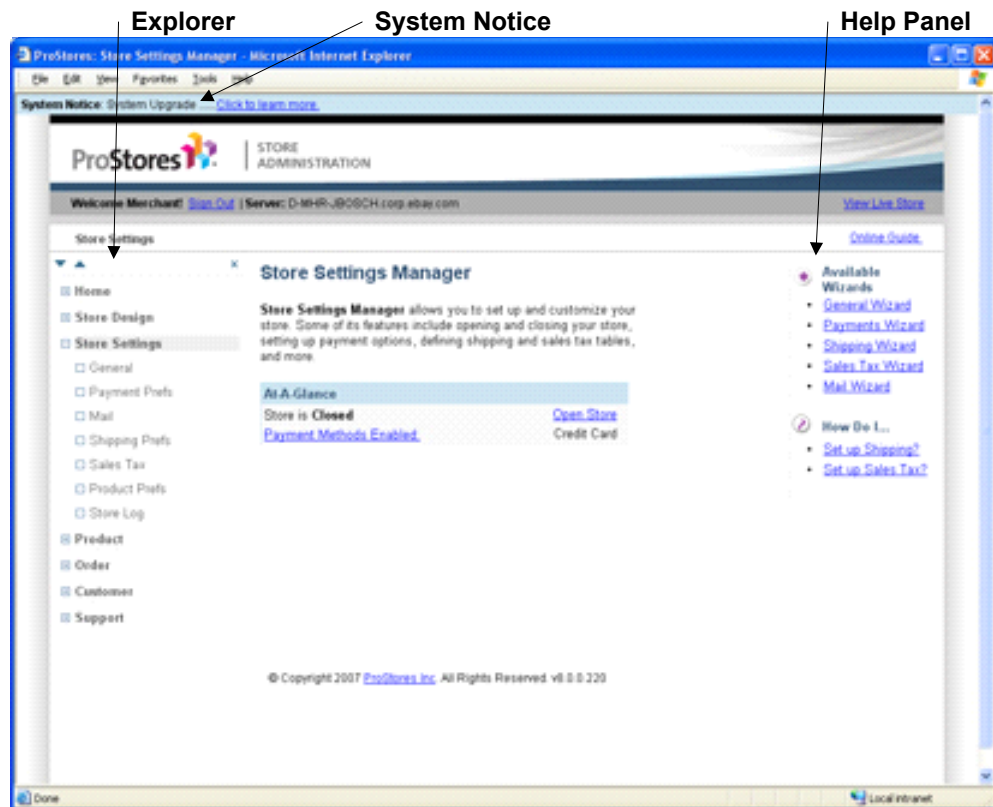
The Store Administration Workspace

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.

Expand   Collapse

Expand/Collapse Buttons
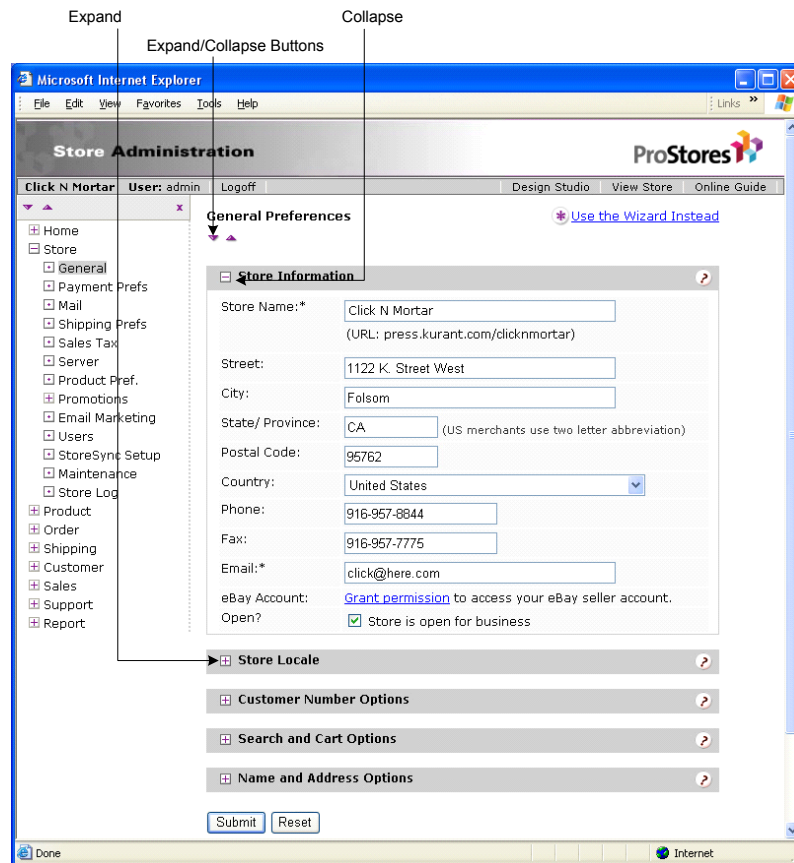
Collapsible Forms

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

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 section provides basic information for you to use in designing your ProStores store. For more detailed and advanced information, please download the *Designer's Reference* from the Articles and Other Useful Information page in the online Help.

Working in Store Design

Store Design is a tool that will help you design your store easily and quickly.

If You Want to Skip This Step

If you do not want to create your store design at this time, you can use the default store design settings, and skip to the next step. You can return to the store design steps at any time.

Before You Begin the Store Design

Before you start making changes in Store Design, you should gather the following information:
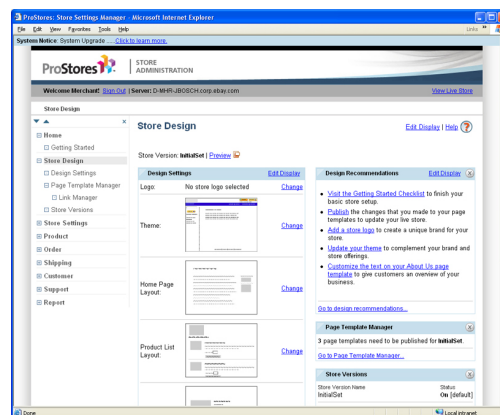
For this section...	Gather
Custom Text	You should draft text to appear on the following storefront pages: Home, About Us, Customer Service, Policies.
Optional Templates	ProStores gives you three optional templates that you can add to your store: Store Locator, Frequently Asked Questions, and Privacy Statement. You should determine if you want to use any of these templates.

Store Design Overview

Design

The Store Design hub allows you to choose the settings for your overall design and individual pages. The **Design Settings** section displays thumbnail pictures of your store page layouts. Click the **Go to design settings...** link to open the Design Settings page, which provides the store page layouts plus additional design information, such as fonts, colors, and customized text.

Some of the settings you can access and change from the Store Design hub and the Design Settings page include:

Theme: This is the overall look and feel for your site. Small images of each theme are presented on this page. To see a larger view, open the Design Settings page, click the Theme **Change** link, then click the theme image currently assigned to the store version, or click any of the other listed images to see a larger sample of the theme. To view additional themes, select a category from the **Theme Category** pull-down menu.

Page Template Manager: Here you will select the pages you would like to include on your store front.

Fonts and Colors: Available in the Design Settings page, the Fonts and Colors page allows you to choose fonts and colors for your store.

Customize Text: Available in the Design Settings page, the Custom Text page allows you to enter the text that you want customers to see on certain pages.

Layouts: The page layouts set the body layout for three key pages in your store: the Home Page, the Product List, and the Product Detail. To view alternate layouts, click the **Change** link for the page layout you want to review, then click the layout image currently assigned to the page template, or click any of the other listed images.

Logo: Here you have the opportunity to upload your store logo or choose not to use one.

If you want to include either the Store Location, Frequently Asked Questions, or Privacy Policy templates in you store, select the appropriate checkboxes in the **Activate or Deactivate Pages** section of the Link Manager page.

Publish Store

This is the final step. To publish any changes you have made to your store design:

Navigate to Store Design > Page Template Manager.

Select the check box next to any pages that display "New edits not published" in the status column.

You can also select the check box next to the column heading to select all page templates, or select the check box next to a page template category to select all page templates within that category.

Click the **Publish** button.

Additional Design Options

While you can create most of your design in the Store Design, there may be other design changes you wish to make. You can read about these features in the following topics in the online Help or in the Store Administration Users Guide.

If you need to ...	Then refer to this topic
Make quick design changes to your store	Store Administration User Guide, Edit Page Template
Make changes to your store using your favorite HTML editor	Store Administration User Guide, Export Page Template

If you need to ...	Then refer to this topic
Upload custom images	Store Administration User Guide, Uploading Images
Review instructions on designing your store	Designers Reference

The predefined page templates and extensive capabilities provided by ProStores generally make maintaining a separate web site and web store unnecessary. Sometimes, though, you may prefer to keep your site. If so, you'll want to design your store so that it flows seamlessly with your existing site. This section provides design tips and instructions for linking your site with your store.

Transferring the Look and Feel of Your Existing Site to Your Storefront

The first step in transferring the look and feel of your existing site to your storefront is to identify those elements that make up your site's design.

Text Fonts and Colors: What fonts and colors are you using for your web page text? Make a note of these, and when you use the ProStores tools, make the selections that match your existing site.

Page Layout: How would you describe the layout of your store? Does your site's navigation run along the top or one side? If so, you'll want to modify your storefront's theme to use the same navigation.

Images: While you may have many images on your page, identify those that are consistent across most pages - those images are the ones to use in your store.

Once you've identified your design elements, you're ready to transfer that design to your storefront.

Choosing a Theme

If you have not already selected a theme, you can select one that matches your existing site or create your own.

To select your theme:

Navigate to Store Design.

Click the **Change** link next to Theme in the **Design Settings** section. The Theme page opens.

Select a category from the **Theme Category** pull-down menu. Browse the theme categories until you find a theme you like.

Click the **Select** option for the theme you like.

Click the **Save and Publish** button.

1. You can create your own theme by selecting the **Create Your Own** theme from the **Favorites** theme category.

2. The theme is stored in your store version's header and footer templates. Any changes to these templates may alter the store version's theme.

Customizing a Theme

ProStores ships with many predesigned themes that you can use. You can browse these themes to see if one matches the general design/colors of your site. If you can't find a perfect match, find one that comes the closest, and then modify the Header and Footer templates so that they match your existing site.

The Header and Footer templates are those portions of your site design that appear on every template. Typically, the Header runs along the top and left portion of the page, and the Footer runs along the bottom, though there are some exceptions.
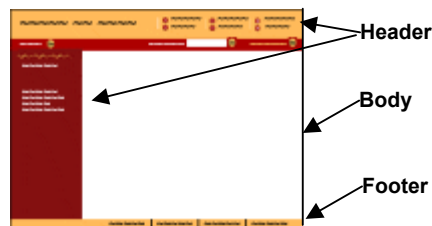
The Header and Footer Templates

To modify your Header or Footer page templates:

1   In Store Administration, navigate to Store Design > Page Template Manager.

2   Expand the **Theme** category if necessary by clicking the expand (+) button.

3   Click the title of the Header or Footer page template. The template opens in the Page Template Editor.

If you're not familiar with HTML, you can use the Basic Editor or the Advanced Editor to edit the template in graphic mode. If you prefer to work directly with the HTML, click the **Source Editor** tab in the Page Template Editor.

4   After making any changes to the template, click the **Save** button to save your changes without publishing them, the **Save and Publish** button to publish your changes, or the **Cancel** button to discard your changes.

The Header and Footer templates contain the design elements for your site ie., your store name, store logo and images that appear consistently throughout the site. The Header and Footer templates surround the content area. The content area is dynamic and holds the individual pages for your site.

If Your Existing Site Uses Frames

Some sites are designed using Frames. "Framed" sites divide your pages into separate regions (for example, to contain the navigation in one frame, and the content in another). Typically in a framed site, one region stays the same all the time, but another region will change based the selected links (and usually, these pages will "scroll" independently of each other).
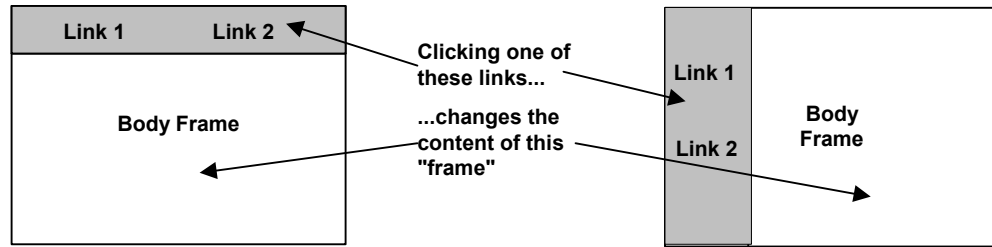
Two examples of framed sites. One frame is shaded, the other is white.

If you created your existing site using frames, you'll want to modify your store's theme so that it works with your existing site's frames. For example, if you have a frameset made of a top banner and body, you'll want to remove or move the content in your store's top banner section. If your frameset is made up of a left and right column, you'll want to modify the theme to move or remove the content on the left side.

In most of the themes, the top and left content of the store is contained in the Header template - modifying this template will allow you to move and remove content so that it fits with your frame design.

Linking to and from Your Storefront

Once you have finalized the design of your storefront, you'll want to add links from your site to your store, and from your store back to your site.

Create Custom Links to Your Store

The Create Custom Links to Your Store page helps you to create the HTML code you need to add links to your storefront from another web site (or e-mail) or to add an "add products to a cart" form to a static site. You can then copy this link and paste it into your external site.

Do not use this tool to create links for use *within* your storefront.

Custom Links

The fields that appear in the **Custom Links** section depend on your selection in the **Link Type** pull-down menu. For example, if you select **Catalog**, this section displays the following:

> **Link Type**
>
> **Link Text**
>
> **Link Target**

If you select **Add Product to Shopping Cart**, this section will also display the following:

> **Product**
>
> **Quantity**
>
> **Buy It Now**

If you make a selection from a pull-down menu, the code in the **Results** section will automatically update to match your selection. However, if you make a change to a field or a check box, click the **Build Link** button to update the code in the **Results** section.

Field	Description
Link Type	Select the type of link you wish to create from the **Type** pull-down menu. Certain selections will bring up another list of options from which you can choose. For example, if you wish to create a link to a specific product, select **Product** from the **Type** pull-down menu, and then select the specific product to which you wish to create the link from the **Product** pull-down menu.
Category	The category in which to search for products. Available for **Search by Product** link only.
Manufacturer	The manufacturer for which to search. Available for **Search by Manufacturer** link only.
Product	Product search words. Available for **Search by Product** link only. To search for a specific product, use the Product drop-down list instead.
Keyword	The keyword for which to search. Available for **Search by Keyword** link only.
Product	Select the product for which you wish to search from the **Product** pull-down menu.
Quantity	The number of products to add to the cart.
Color	The color of the product to be added to the cart. Available only for products that have color attributes assigned.
Size	The size of the product to be added to the cart. Available only for products that have size attributes assigned.
Buy It Now	Select this check box if the product should be added to the cart and the visitor should go straight to the Checkout page.
Link Text	Enter the text that will appear in the link.
Link Target	From the pull-down menu, select the window in which the page should open: Open in new window Open in same window

Results

This section displays the results of your link selections, and allows you to test the link to your store.

Field	Description
Link Sample	The **Link Sample** area provides a preview of how the link will appear, and provides a link that you can click to test how the link will work.
Link Source	This text area shows the text version of the link. This is the text that ProStores will copy to your clipboard if you click the **Copy to**

Field	Description
	Clipboard button. The copied text will also include any changes you make in this text area.
Copy to Clipboard Button	If you are using Internet Explorer version 5.5 or higher, click the **Copy to Clipboard** button to copy the Link Source to the clipboard. If you are using another browser, select the link code and use your browser's Copy tool. You can then paste it into the editor in which you are editing your external page.

Link Manager

You can use the Link Manager page to activate or deactivate specific pages for your store and to redirect certain store page links to point to external Web pages.

Activate or Deactivate Pages

This option enables you to activate or deactivate one or more store pages. Deactivated pages will not appear in your ProStores Web store.

To activate a page:

Navigate to Store Design > Page Template Manager > Link Manager.

If you have more than one store version, select the version you want to modify from the **Store Version** pull-down menu.

In the **Activate or Deactivate Pages** section, select the check box next to each page you want to activate.

You must activate the Customer Service page before you can activate the Frequently Asked Questions, Privacy Policy, and Store Location pages.

Click the **Save** button.

To deactivate a page:

Navigate to Store Design > Page Template Manager > Link Manager.

If you have more than one store version, select the version you want to modify from the **Store Version** pull-down menu.

In the **Activate or Deactivate Pages** section, clear the check box next to each page you want to deactivate.

Deactivating the Customer Service page will also deactivate the Frequently Asked Questions, Privacy Policy, and Store Location pages.

Click the **Save** button.

Redirect Pages

This option enables you to link specific pages within your store to Web pages that exist at URLs outside of your ProStores Web store. For example, if you have another Web site that

has your About Us page, you can direct your store's About Us link to that page. This gives your visitors a seamless transition between your Web site and your store.

This option only applies to active pages. Deactivated pages appear dimmed, and their options are unavailable.

To redirect a ProStores Web store page to another Web page:

> Navigate to Store Design > Page Template Manager > Link Manager.

> If you have more than one store version, select the version you want to modify from the **Store Version** pull-down menu.

> In the **Redirect Pages** section, select the **Use My Other Site's Page** option associated with the page you want to redirect.

> Enter the full address of the page in the **URL** field (for example, http://www.mysite.com/about.html).

> Repeat the previous two steps for each page you want to redirect.

> Click the **Save** button.

To stop redirecting a ProStores Web store page to another Web page:

> Navigate to Store Design > Page Template Manager > Link Manager.

> If you have more than one store version, select the version you want to modify from the **Store Version** pull-down menu.

> In the **Redirect Pages** section, select the **Use My ProStores Page** option associated with the page you want to redirect.

> Repeat the previous two steps for each page you want to redirect.

> Click the **Save** button.

Copying Content From Another Web Site

The **Copy Center** tool helps you to copy portions of another web site (such as a site you already maintain) to your storefront. Using **Copy Center**, you can view both your storefront and another web site at the same time, and then "drag and drop" pieces of the web site into your storefront.

This tool is only available if you are using Internet Explorer version 5.5 or higher.

To copy content from another site to your store:

1 Navigate to Store Design > Page Template Manager.

2 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.

3   Click the **Advanced Editor tab**.

4   Click the **Copy Center** button (![icon]) on the tool bar. The Copy Center opens in a new window.

5   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.

6   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.
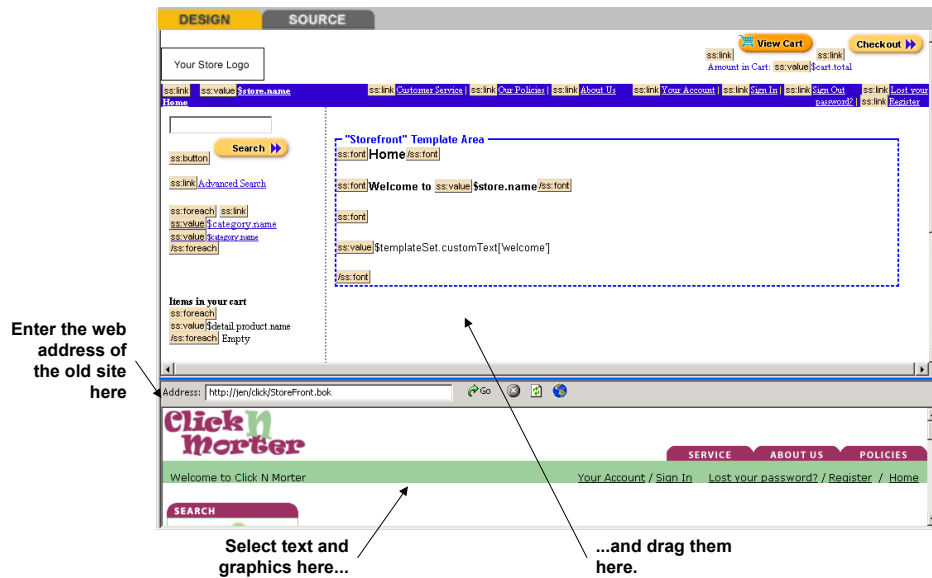
To make content selection easier, right-click inside the Copy Center window and clear the **Browser mode** option.

7   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.

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

9   When done, close the Copy Center window.

The following table describes the context menu options available when you click the right mouse button with the cursor pointed inside the Copy Center window.

Option	Description
Copy	Copies selected content to the clipboard for pasting into the page template in the Advanced Editor.
Select Element	Selects the element currently under the cursor.
View > Borders	Toggles display of borders around elements such as images and tables.
View > Markers	Toggles display of markers that graphically represent HTML markup tags such as anchors or image tags.
Find	Opens the browser's **Find** dialog box for searching the page for specific text.
Browse Mode	Toggles browse mode on and off. If Browse Mode is selected (on), the Copy Center window behaves like a browser window. For example, if you click an image link in browse mode, the linked page opens in the Copy Center window. If Browse Mode is cleared (off), the Copy Center behaves much like an

Option	Description
	editor window. For example, if you click an image link with browse mode off, the image becomes selected, and the linked page does not open.

Enter the web address of the old site here

Select text and graphics here...

...and drag them here.

Using the Copy Center Tool

Once you have designed your store, you'll need to complete a few more steps before you open your store for business.

If you...	Then review these sections
Completed your store design	*General Preferences* (page 17) *Payment Preferences* (page 18) *Shipping Setup* (page 18) *Sales Tax Setup* (page 19)
Are using the Advanced Edition, and want to track inventory	Managing Inventory (in the Store Administration User Guide)
Are using the Advanced Edition, and want to create a members-only area of your store	Creating a Members-Only Area (in the Store Administration User Guide)
Want to add users who can access the Store Administration area	Managing Users (in the Store Administration User Guide)

General Preferences

General Preferences allow you to define your store information and options.

If you did not run the General Preferences Wizard, you'll need to enter your store address and contact information. If you selected a Catalog List layout that displays search results using an odd number of columns, you should update the **Max Per Page** field so that the number of items displayed on a page is a multiple of the number of columns you are using.

You can access this page by browsing to the Store Manager | General Preferences page.

Refer to the General Preferences topic in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information.
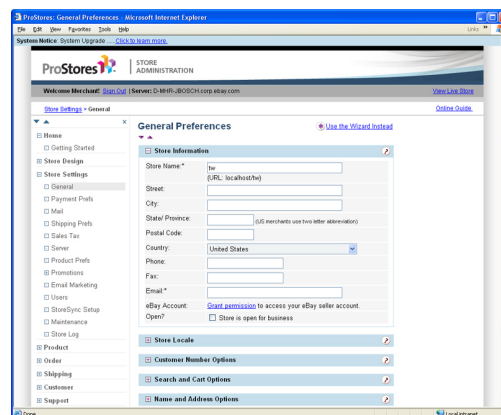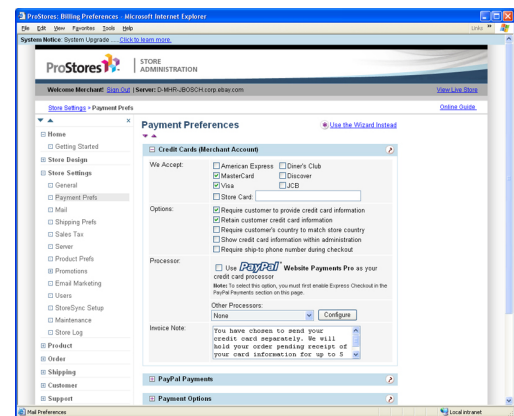
Payment Preferences

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

If you did not run the Payment Preferences Wizard, you'll need to select the payment options you wish to offer. If you will be using an online payment processor, you'll need to enter the processor configuration from this page as well.

You can access this page by browsing to the Store Manager | Payment Preferences page.

You can also use the Payment Preferences wizard, available on the Store Manager home page, to set up your Payment Preferences.

Refer to the Setting Payment Preferences Information topic in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information. In addition, the Online Guide and Store Administration User Guide contain detailed information to aid in understanding payment processors and merchant accounts.

Shipping Setup

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

If you plan on charging for shipping, you'll need to set up your shipping tables. In addition, your Site Administrator may offer custom shipping tools to help you with this part of your business.

You can access this page by browsing to the Store Manager | Shipping page.

Refer to the Shipping Preferences in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information.
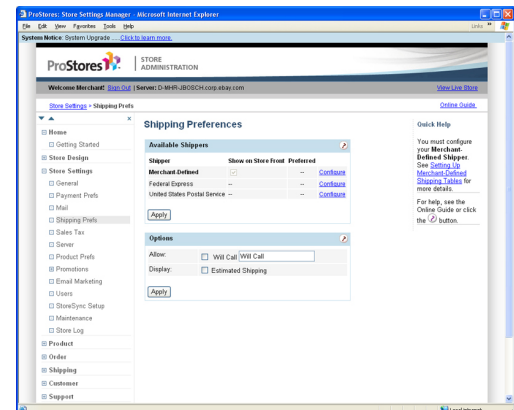
You can also use the Shipping wizard, available on the Store Manager home page, to set up your shipping tables.

Sales Tax Setup

The Sales Tax Preferences page allows you to define sales tax tables that apply to your country and region.

You can access this page by browsing to the Store Manager | Sales Tax page.

You can also use the Sales Tax wizard, available on the Store Manager home page, to set up your sales tax tables.

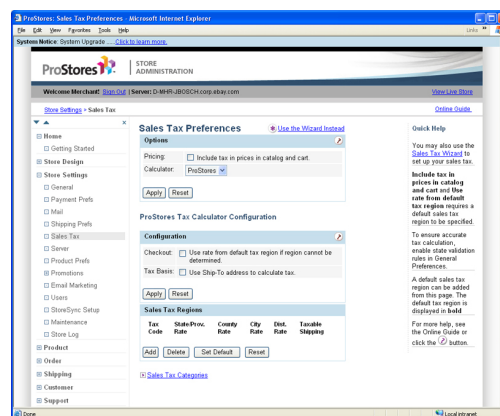Refer to the Defining Sales Tax Rates topic, in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information.

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.

Even if you entered your product information using the Add Product Wizard, review this section to ensure that your catalog is set up the way you want it.

| If you...	Then review these sections
Entered all your products using the Add Product Wizard	*Shipping Based on Product Weight* (page 21) *Product Images* (page 21) *Updating Products* (page 21)
Need to enter all your products, or more products than you entered in the Add Product Wizard	*Importing Product Information* (page 20) *Product Images* (page 21)
Update product information	Refer to the "Maintaining Products" topic in the Online Guide, or the Store Administration Users Guide

Importing Product Information

You can import product information using a spreadsheet file. Doing so allows you to quickly add or update a large number of products at one time.

See the Exporting Tables and Importing Tables topics in the Online Guide or Store Administration User Guide.
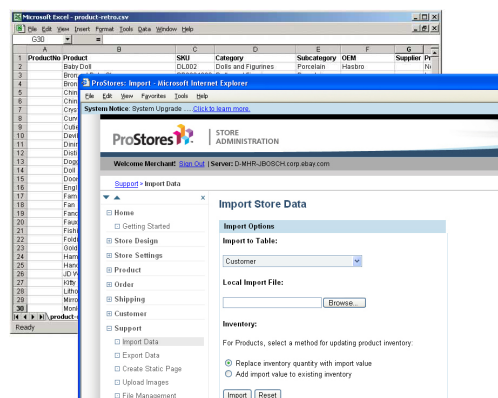
Updating Products

Once you've entered all your products, you can update them using the Product Manager (see the Maintaining Product Profiles topic in the Online Guide or Store Administration User Guide for more information), or by exporting and importing your product information. See *Importing Product Information* (page 20) for more information.
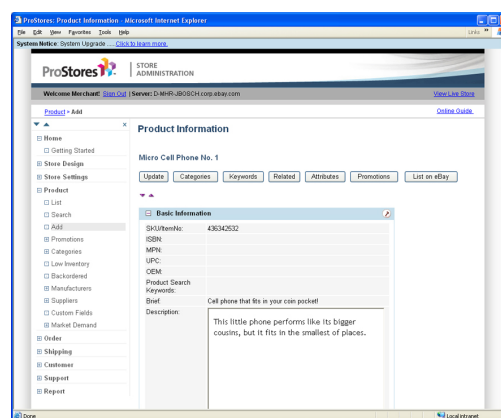
Product Images

There are two types of images you can display with your product. The "thumbnail image" is the small image that will most likely appear in the product search results and product detail page. The "photo image" is a larger image that can provide more details to your customer.

These images can be uploaded by adding or updating a product in the Product Manager or by using the Upload Images feature in the Support Manager. See the Uploading Images topic in the Online Guide or Store Administration User Guide for more information.

Shipping Based on Product Weight

If you are calculating your shipping costs based on product weight, you will need to enter the weight for all products. You can do this by updating each product manually (see the Maintaining Product Profiles topic in the Online Guide or Store Administration User Guide), or by exporting and importing your product information. See *Importing Product Information* (page 20) for more information.

Before doing so, you should enter the unit of measure you will be using on the General Preferences page in the Store Manager. This will help ensure that the same unit of measure is used for all products, which is necessary in order for shipping based on weight to work.

Once you've designed and configured your store, it's time to test.

This chapter makes testing recommendations, and provides instructions to help you test your store.

Equipment and Software to Test

To ensure that your store can be viewed and easily used by the maximum number of customers, we recommend that you test your system using a variety of software and platforms, including (but not limited to), the following:

Operating Systems: such as Windows XP, Windows ME, and Macintosh. Don't assume that if your design works on one operating system, it will work in all versions of that system.

Browsers: at a minimum, you should test using Internet Explorer versions 5 and 6, and Netscape versions 6 and 7. However, there are still customers with older browsers that you may want to consider testing.

Monitor Resolution: the most common monitor resolution is 800x600. We recommend setting your monitor resolution to the minimum you want to require of your customers when testing - refer to the software that comes with your operating system for more information on setting monitor resolution.

JavaScript: some customers disable JavaScript in their browsers for security reasons. If you have added JavaScript to your pages, or if you are using the columnar Catalog List layouts provided by ProStores, we recommended disabling JavaScript in your test browser and testing your store to ensure that it is still usable.

How to Test

Following are recommendations on how to test your store.

Testing Store Information Templates

Store Information is typically contained on the following templates. To test the design of these templates, you can either navigate to them from the storefront, or use the following URL structure:

```
http://[storeurl]/Page.bok?template=[templatename]
```

...where [templatename] is the template short name.

About Us [about]

Policies [policy]

Store Locator [locator] (optional template)

FAQ [faq] (optional template)

Privacy Statement [privacy] (optional template)

Testing the Product Catalog Templates

Following are some scenarios to test your product catalog design:

Do a product search. Does the Catalog List appear as expected?

View the detail for any product. Does the page appear as expected?

View the detail for any product that has color or size attributes. Does the "add to cart" portion of the page appear as expected?

View the detail for any product that has related products. Does the "Related Products" portion of the page appear as expected? *(Advanced Edition only)*

If applicable, search for a product that uses a custom Catalog Detail template. Does the page appear as expected?

Testing the Checkout Templates

Following are some scenarios to test your checkout-related pages.

Purchase a product and check out as a new customer. Do the templates appear as expected?

If applicable, purchase a product that uses an Order Extensions template, and check out. Does the Order Extensions template appear as expected? *(Advanced Edition only)*

Purchase a product and check out, this time opting to ship this product as a gift. Does the Ship To - Gift template appear as expected? *(Advanced Edition only)*

Testing Membership and Subscription Templates

(Advanced Edition only)

Following are some scenarios to test your membership and subscription templates.

If you are setting up a store subscription program:

In the storefront, is the link to "Join Now" visible or easily accessible?

Click the "Join Now" link, and purchase the store subscription product. Do the templates appear as expected?

If you are setting up a membership area for your store:

In the storefront, are the "Logon" and "Logoff" links visible or easily accessible?

Register as a new customer. Do all the templates appear as expected?

Log in as the customer you just registered as. Do any "members-only" customizations you have made appear?

If you have customized your members-only templates, search for a product and view the Catalog List. Then, view the product detail. Do the templates appear as expected?

Testing Customer Service Templates

Your customer service templates are key to caring for your customers after they have purchased products. The following scenarios will help test the design of your customer service templates.

Go to the Service page, and click the **Account Information** link. Does the Customer History template appear as expected?

Go to the Service page, click the **Lost Passwords** link, and complete the form. You should receive your password via e-mail. Is the e-mail formatted as expected?

If you have selected any of the notification options in **Mail Preferences**:

Check out as a new customer, using your own e-mail address. You should receive an order confirmation e-mail. Is the e-mail formatted as expected?

In Store Administration, apply a credit to the order. You should receive a credit confirmation. Is the e-mail formatted as expected?

In Store Administration, ship the order. You should receive a shipping confirmation. Is the e-mail formatted as expected?

Once you have designed, configured and thoroughly tested your store, it's time to "go live" and start taking orders!

Before going live, you'll want to do the following:

Delete any test customers you created: You can do this by viewing each customer in the Customer Manager, and then clicking the **Delete** button at the bottom of the page. See the Maintaining Customer Profiles topic in the Online Guide or Store Administration User Guide.

Delete any test orders you created: You can either delete individual orders, or you can go to Store Manager > Maintenance to purge all orders. See the Maintaining Database Tables topic in the Online Guide or Store Administration User Guide.

Clean Database: Clean out your database tables of any test information, using the Store Manager | Maintenance feature. See the Maintaining Database Tables topic in the Online Guide or Store Administration User Guide.

Congratulations on completing the setup of your store. For more information on maintaining your store, refer to the documentation shipped with the application.

Thank you!