Red Hat Interchange 4.8: Administration Tool Guide

Draft

Red Hat, Inc.
2600 Meridian Parkway
Durham NC 27713 US
docs@redhat.com
919-547-0012 voice
919-547-0024 fax
1-888-733-4281 toll free

Table of Contents

CHAPTER ii

List of Tables

CHAPTER 1

Introduction

The purpose of the Red Hat Interchange Administration Tool Guide is to get you started with in using the Interchange Administration Tool to manage your Interchange online store. It will familiarize you with the functionality that is built into the system, but does not address any customization or additions that may have been made.

> ***Note:*** For information on the style conventions used throughout this document, see *Red Hat Interchange: Getting Started Guide*.

About the Interchange Administration Tool

The Interchange Administration Tool provides a user friendly interface for using, managing, and administering the many functions of Interchange. The Interchange Administration Tool is accessible from any machine with a fully functional browser.

> ***Note:*** Although Interchange and your web server must be installed and functioning on a Linux or Unix platform, the Interchange Administration Tool can be accessed from almost any remote computer.

Logging on to the Administration Tool

How you log on to the Interchange Administration Tool depends on if you installed Interchange from the **RPM** or from the **tarball**. For more information on installing Interchange, see *Red Hat Interchange 4.8: Getting Started Guide*.

Note: If you are unsure of how Interchange was installed, contact your Interchange Site Administrator for the user name and password.

RPM Installation. If you installed Interchange from the RPM, use the following user name and password to log on to the Administration Tool:

User Name—interchange

Password—pass

Note: This user name and password will log you on as the Interchange Site Administrator. For more information on Interchange Administrators, see *About Interchange Administrators, page 5*.

!!! To protect your system, it is strongly recommended that you change the default user name and password after the initial log on. This is done from the **Access** page. For more information on the **Access** page, see *The Access Page, page 65*. Store your user name and password in a secure place

tarball Installation. If you installed Interchange from the tarball, use the user name and password you set during the installation process. This user name and password will log you on as the Interchange Site Administrator. For more information on Interchange Administrators, see *About Interchange Administrators, page 5*. Store your user name and password in a secure place.

Using the Administration Tool

The Interchange Administration Tool is divided into different areas and sections to help you find the function you are looking for. Figure 1, page 3, shows an example of the Interchange Administration Tool home page. Table 1, page 3, explains the areas and sections found in the administration tool.

Note: The figures used throughout this document are examples of the Interchange Administration Tool. Depending on how your Interchange Administration Tool options were set, your administration tool may look slightly different.

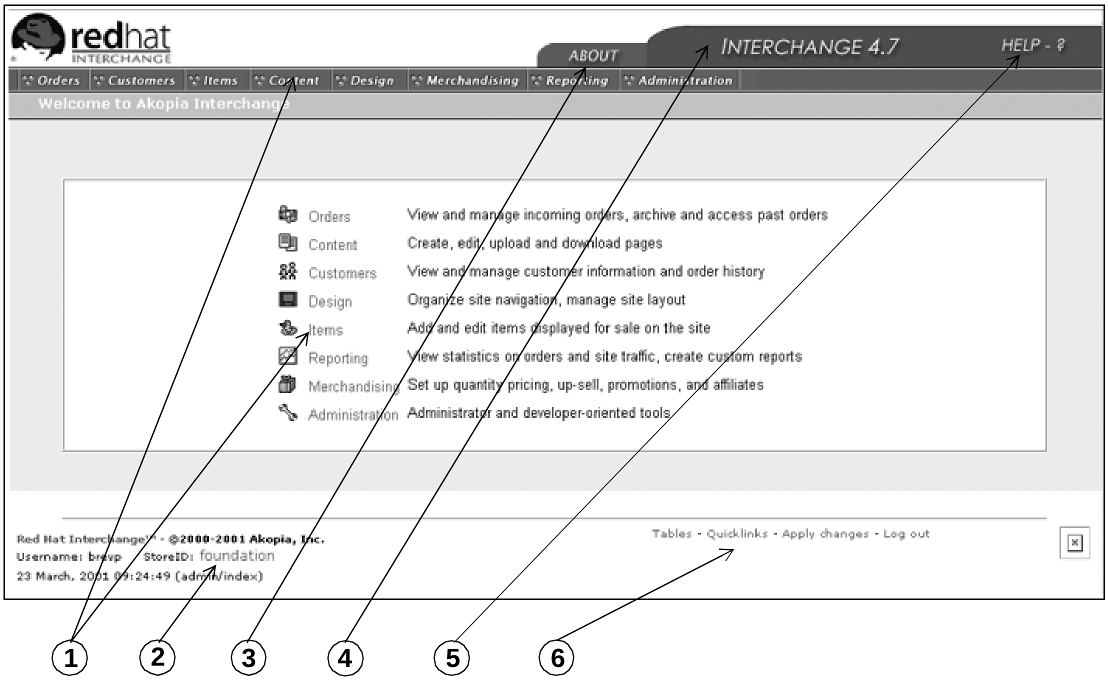


FIGURE 1: THE ADMINISTRATION TOOL

Table 1 describes the different areas of the Interchange Administration Tool.

TABLE 1. The Interchange Administration Tool

AREA	FUNCTION
1	Access the sections of the Administration tool.
2	Access your e-business storefront.
3	Learn more about Interchange.

TABLE 1. The Interchange Administration Tool (Continued)

AREA	FUNCTION
4	Return to the Administration tool home page (shown).
5	Display page specific help screens.
6	Access commonly used functions. The following list describes these functions: • Tables—links to the **Tables** page. For more information on the **Tables** page, see *The Tables Page, page 68*. • Quicklinks—opens a reference window containing common Administration tool functions. • Apply Changes—applies the changes you made to your site. This is required for some changes to take effect. • Logout—logs you out of the Administration Tool and displays the Administration Tool Log In page.

The Interchange Administration Tool is made up of eight sections. The following is a brief explanation of each section. For more information on the sections of the Administration Tool, see *Understanding Administration Tool Functionality, page 9*.

- **Orders—**view, enter, and archive customer orders. For more information on the **Orders** section, see *The Orders Section, page 9*.
- **Content—**upload and download site content. For more information on the **Content** section, see *The Content Section, page 30*.
- **Customers—**view and change customer information as well as change customer status. For more information on the **Customers** page, see *The Customers Section, page 15*.
- **Design**—organize site information, create search mechanism, build links and buttons, and create static pages. For more information on the **Design** section, see *The Design Section, page 35*.
- **Items**—edit existing products, add new products, and specify inventory tracking. For more information on the **Items** section, see *The Items Section, page 23*.

- **Reporting**—generate reports and analyze the trends of your site and affiliate traffic. For more information on the **Reporting** section, see *The Reporting Section, page 56*.
- **Merchandising**—implement merchandising features such as cross-sell, up-sell, promotion, and quantity pricing. For more information on the **Merchandising** section, see *The Merchandising Section, page 42*.
- **Administration**—access administration information such as shipping, payment, tax, and access preferences as well as the Interchange data tables. For more information on the **Administration** section, see *The Administration Section, page 60*.

About Interchange Administrators

There are two levels of administration access, the Interchange Site Administrator and the Interchange Site Associate. This section describes the roles and responsibilities associated with each.

Interchange Site Administrator

The *Interchange Site Administrator* oversees all activity of the Interchange Administration Tool. He or she controls site access privileges for the Interchange Site Associate access. The Interchange Site Administrator is also responsible for setting up the access privileges for new Interchange Site Associate accounts and/or groups of accounts. More than one Interchange Site Administrator can be established by creating an Interchange Site Administrator group. However, it is recommended that only one Interchange Site Administrator be established.

Interchange Site Associate

The *Interchange Site Associate* uses the Administration Tool for daily operations as regulated by the Interchange Site Administrator. The Interchange Site Associate can be an individual or a group of individuals that has specialized access to the Administration Tool. The Interchange

Site Associate or group access permissions are established by the Interchange Site Administrator.

Understanding the Meta Field

The *meta field* is viewable only to the Interchange Site Administrator and it allows him or her to customize the specifications of a field. The meta field is a link displayed below a field name. Figure 2, page 6 shows an example of a page as viewed by both an Interchange Site Administrator and an Interchange Site Associate.

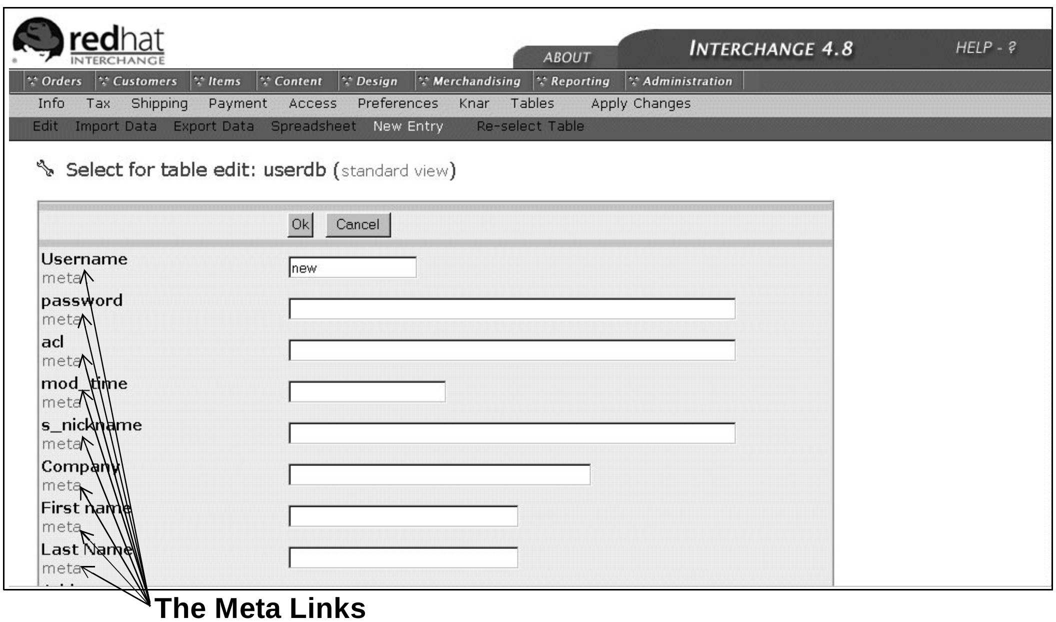


FIGURE 2: THE META FIELD IN THE ADMINISTRATION TOOL

Once the meta field link is clicked a table containing the specifications for that field. From this table, you can change the variables for that field, such as the field name, values accepted in that field, etc. Figure 3, page 7, shows an example of the Meta table.

Note: If the Meta Field is not visible to you, you do not have Interchange Site Administrator permissions.

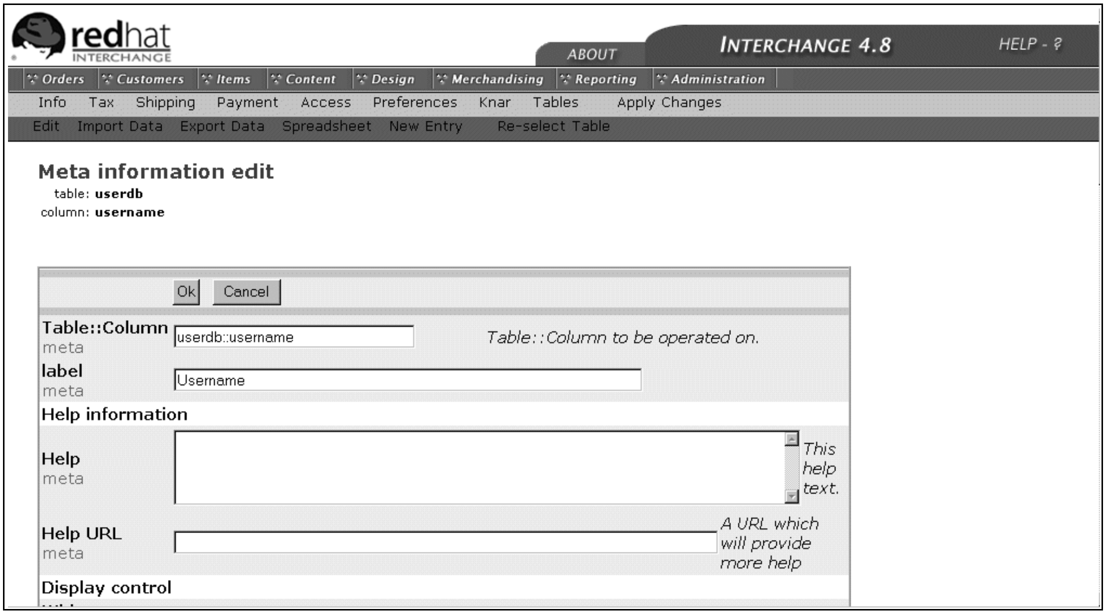


FIGURE 3: THE META TABLE

For an example, the current Administration Tool has the field **Weight in pounds** on the **Create New Item** page. If your e-business deals in goods distributed online, this field would not be of use, but a field for a software version number would. Using the **Meta** tag, you can change the name and specifications of the **Weight in pounds** field to create the field **Software version number**. To access the Meta table for a particular field, click the **Meta** tag below the desired field.

Note: Some of the fields throughout the Administration Tool may have been changed by the Interchange Site Administrator. If you have a question about a field not listed in this guide, contact your Interchange Site Administrator.

About Auto-Export

The *Auto-Export* check box is found in many of the tables throughout the Administration Tool. By checking this box the information you entered, added, or changed on the page will be automatically updated in

CHAPTER 2

Understanding Administration Tool Functionality

This chapter describes each section of the Interchange Administration Tool. For a description of each section, see *Using the Administration Tool, page 2*.

> ***Note:*** Depending on the access privileges set for you by the Interchange Site Administrator, some of the sections or pages of the Administration Tool may not be visible.

The Orders Section

The **Orders** section allows you to view pending orders, archived orders, or enter an order.

> ***Note:*** Your individual access to the features of this section depends on permissions established by the Interchange Site Administrator.

The Pending Orders Page

The *Pending Orders* page allows you to view pending order information. Pending orders are orders that have been entered into your system that are not yet fulfilled. Orders that are entered from the **Enter Order** page are automatically listed on the **Pending Orders** page. For more information on entering an order, see *The Enter Order Page.*

> ***Note:*** The **Pending Orders** page displays information in real-time. However, if you leave this page open or your Web browser has cached the page's contents it is recommended that you re-load the page periodically to see the most recent orders.

Figure 1 shows an example of the **Pending Orders** page.

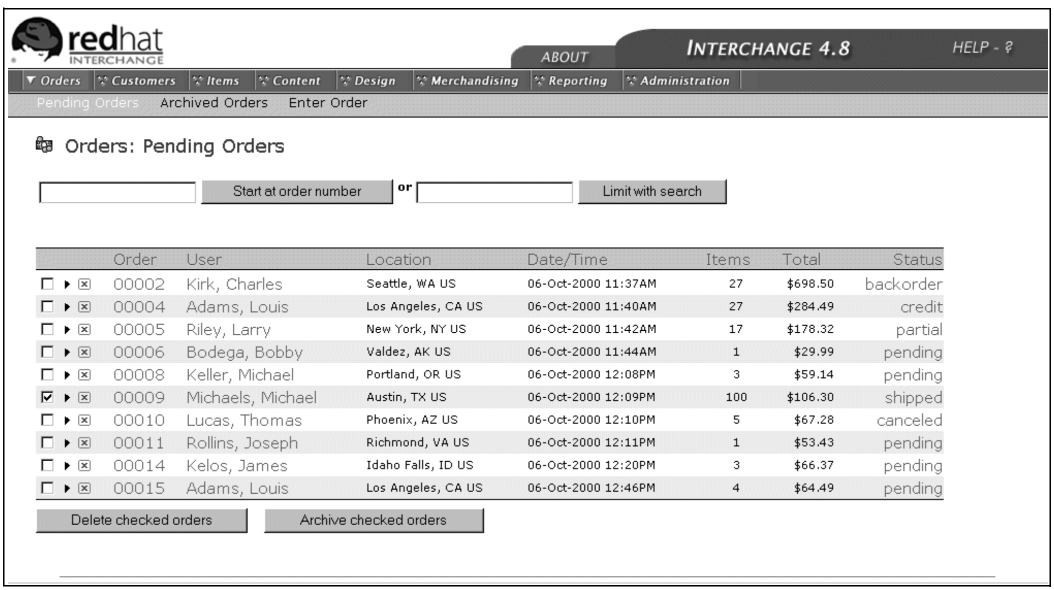


FIGURE 1: THE PENDING ORDERS PAGE OF THE ORDERS SECTION

Table 1, page 11, describes the fields and buttons displayed on the **Pending Orders** page.

TABLE 1. The Pending Orders Page

FIELD/BUTTON	FUNCTION
Start at Order Number	Allows you to type the order number to be displayed first. Following this number, all other order numbers are displayed in numerical order.
Limit with Search	Allows you to type the parameter by which you want to search. For example, type **CA** to search all orders originating in the state of California. Only the orders containing the search parameter will be displayed.
Delete Checked Orders	Allows you to delete the desired order(s). Click this button after checking the order(s) allows you to delete. A warning is displayed. Click **OK** to complete the task. The deleted items are removed from the **Orders** page, but remain in the system. ***Note:*** To delete an individual order, click the **X** in the red square beside the order number.
Archive Checked Orders	Allows you to Archive the desired order(s). Click this button after checking the order(s) you want to archive. The order(s) are moved to the **Archived Orders** section. For more information on the **Archived Orders** page, see *The Archive Orders Page, page 12*. ***Note:*** To archive an individual order, click the black arrow beside the order checkbox.

You can sort the pending order list by clicking the heading of the column by which you want to sort. For example, you can sort by total price by clicking the **Total** heading. This displays the orders by amount in ascending or descending order. To sort in reverse order, click the heading again.

You can view the details of a specific order by clicking the **Order Number**, **User**, or **Status** of that order. Click the **Order Number** to access the View Order page. Click the **User** to access the View Customer Page. Click the **Status** to access the Order Status page. For more information on the View Order, View Customer, or Order Status pages, see *The Customers Section, page 15*.

The Archive Orders Page

The *Archive Orders* page displays all archived orders in the Interchange system. Orders are usually archived after they have been fulfilled. For an order to be displayed in the **Archived Orders** section, it must be manually moved from the **Pending Orders** section.

> ***Note:*** The **Archived Orders** page displays information in real-time. However, if you leave this page open, or your Web browser has cached the page's contents, it is recommended that you re-load the page periodically to see the most recent orders.

Figure 2 shows an example of the **Archived Orders** page.

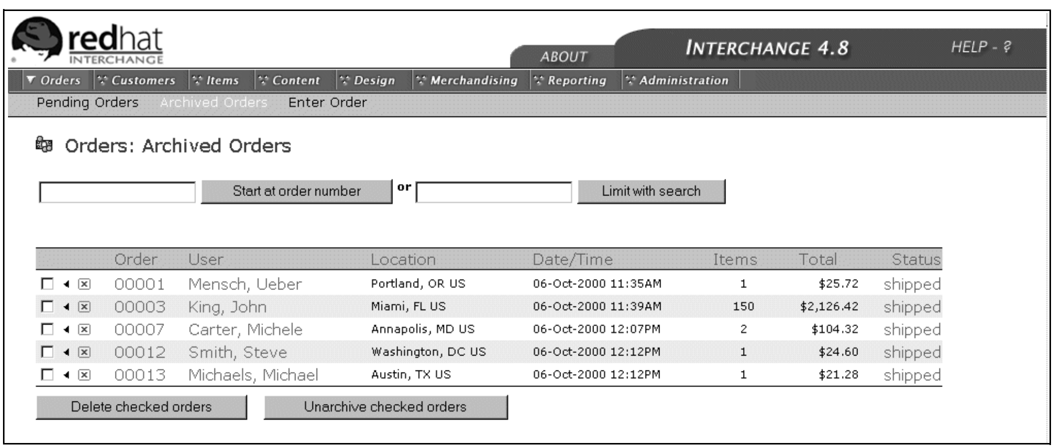


FIGURE 2: THE ARCHIVED ORDERS PAGE OF THE ORDERS SECTION

Table 2, page 13, explains the fields and buttons displayed on the **Archived Orders** page.

TABLE 2. The Archived Orders Page

FIELD/BUTTON	FUNCTION
Start at Order Number	Type the order number to be displayed first. Following this number, all other order numbers are displayed in numerical order.
Limit with Search	Type the parameter by which you want to search. For example, type **CA** to search all orders originating in the state of California. Only the orders containing the search parameter will be displayed.
Delete Checked Orders	Delete the desired order(s). Click this button after checking the order(s) to delete. A warning is displayed. Click **OK** to complete the task. The deleted items are removed from the **Orders** page, but remain in the system. ***Note:*** To delete an individual order, click the **X** in the red square beside the order number.
Unarchive Checked Orders	Unarchive the desired order(s). Click this button after checking the order(s) you want to unarchive. The order(s) are moved to the **Pending Orders** section. ***Note:*** To archive an individual order, click the black arrow beside the order checkbox.

You can sort the archived order list by clicking the heading of the column by which you want to sort. For example, you can sort by total price by clicking the **Total** heading. This displays the orders by amount in ascending or descending order. To sort in reverse order, click the heading again.

You can view the details of a specific order by clicking the **Order Number**, **User**, or **Status** of that order. Click the **Order Number** to access the View Order page. Click the **User** to access the View Customer Page. Click the **Status** to access the Order Status page. For more information on the View Order, View Customer, or Order Status pages, see *The Customers Section, page 15*.

The Enter Order Page

The *Enter Order* page allows you to enter an order for a new or existing customer. Figure 3 shows an example of the **Enter Order** page.

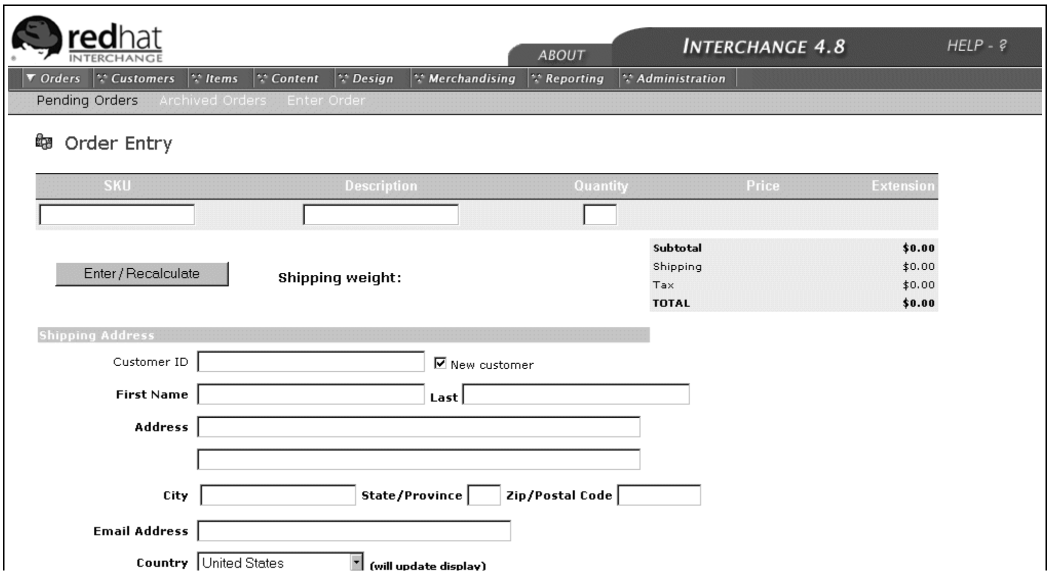


FIGURE 3: THE ENTER ORDER PAGE OF THE ORDERS SECTION

Table 3 explains the fields and buttons displayed on the **Enter Order** page.

TABLE 3. The Enter Order Page

FIELD/BUTTON/AREA	FUNCTION
SKU	Enter the SKU number of the item. The SKU is the only required field when entering an order. If you are unsure of the SKU information for the item you are entering, see the **Items Section**.
Description	Enter a description for the item you are entering. This lets you narrow the product to a color, size, or other parameter. This field is not required.

TABLE 3. The Enter Order Page

FIELD/BUTTON/AREA	FUNCTION
Quantity	Enter the quantity of the items to be ordered. If this field is left blank the default quantity is set to one.
Enter/Recalculate	Submits the order information to the Interchange system for cost calculation. The order information, including subtotal, shipping, tax, and total are displayed. ***Note:*** To remove an item from the order, click the **Remove** checkbox beside the item.
Shipping Address Area	Enter the customer's shipping information. If the customer is new, this information will be saved to the customer database.
Find	Search the customer database for a pre-existing customer's shipping information after completing all or a portion of the **Shipping Address** fields. For example, entering only **CA** in the **State** field before clicking **Find** will display all customers in the database shipping to California. Then, from the displayed list of customers, choose the desired customer and click **Select**. The fields in the **Shipping Address** area are automatically populated with that customer's information.
Clear	Clears all shipping address information.
Credit Card Information Area	Enter the customer's payment information. The fields displayed in this section depend on how your system is set up.
Billing Address Area	Enter the customer's billing address if different from the shipping address.
Email Preferences Area	Enter the customer's email settings.
Place Order	Click to place the order.
Gift note or Special Instructions	Enter special information regarding the customer's order.

The Customers Section

The **Customers** section allows you to view active customers, inactive customers, and create a new customer.

The Active Customers Page

The *Active Customers* page allows you to view the customers that are active in your system. An active customer usually has a pending order or an order that has been recently filled. See your Interchange Site Administrator for the criteria for active customers. Figure 4 shows an example of the **Active Customers** page.

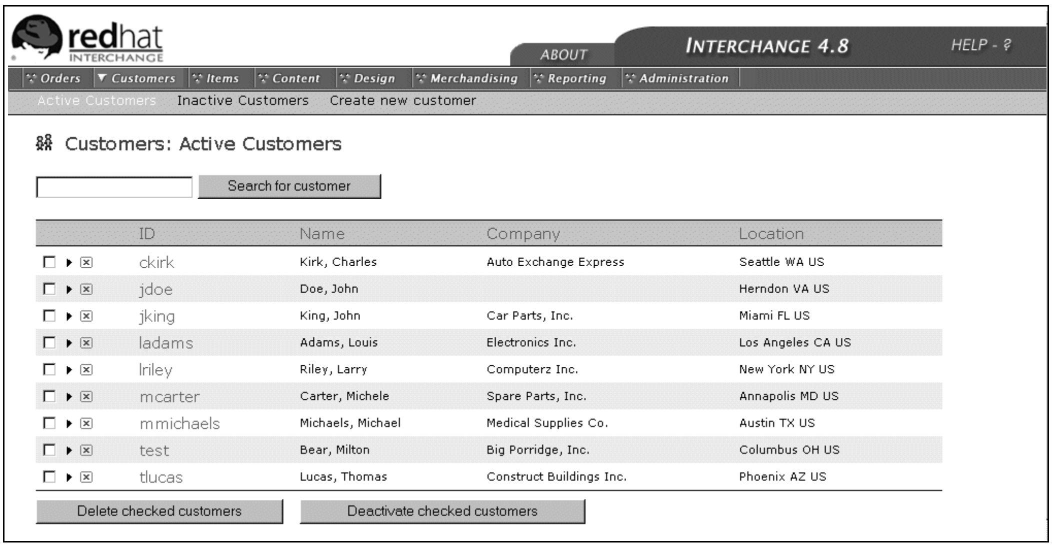


FIGURE 4: THE ACTIVE CUSTOMERS PAGE OF THE CUSTOMERS SECTION

Table 4 describes the fields and buttons displayed on the **Active Customers** page.

TABLE 4. The Active Customers Page

FIELD/BUTTON/AREA	FUNCTION
Search for Customer	Search for a customer by typing that customer's name in the field and clicking **Search for Customer**. If you enter only a customer's first name, all customers with that first name will be displayed.
Delete Checked Customers	Delete the desired customer(s). Click this button after checking the box beside the customer(s) you want to delete. A warning is displayed. Click **OK** to complete the task. The deleted customers are removed from the **Active Customers** page, but remain in the system. ***Note:*** To delete an individual customer, click the **X** in the red square beside the customer ID.
Deactivate Checked Customers	Deactivate the desired customer(s). Click this button after checking the customer(s) you want to archive. The customers are moved to the **Inactive Customers** section. For more information on the **Inactive Customers** page, see *The Inactive Customers Page, page 18.* ***Note:*** To deactivate an individual customer, click the black arrow beside the customer ID.
ID	This column displays the Customer's unique ID.
Name	This column displays the Customer's Name.
Company	This column displays the Company that the customer is associated with.
Location	This column displays the customer's shipping location.

You can sort the active customers by clicking a column by which you want to sort. For example, you can sort by customer ID by clicking the **ID** heading. This displays the customers by customer ID in ascending/descending or alphabetical order depending on how your customer IDs are generated. To sort in reverse order, click the heading again.

You can view the details of a specific customer by clicking the customer's **ID**. The **View Customer** page is displayed. For more information on the **View Customer** page, see *The View Customer Page, page 22*.

The Inactive Customers Page

The *Inactive Customers* page allows you to view the customers that are not active in your system. An inactive customer usually decided not to create a customer account when ordering or hasn't submitted an order recently. See your Interchange Site Administrator for the criteria for inactive customers. For a customer to be displayed in the **Inactive Customers** section it must be manually moved from the **Active Customers** section. Figure 5 shows an example of the **Inactive Customers** page.

FIGURE 5: THE INACTIVE CUSTOMERS PAGE OF THE CUSTOMERS SECTION

Table 5, page 19, describes the fields and buttons displayed on the **Inactive Customers** page.

TABLE 5. The Inactive Customers Page

FIELD/BUTTON/AREA	FUNCTION
Search for Customer	Search for a customer by typing that customer's name in the field and clicking **Search for Customer**. If you enter only a customer's first name, all customers with that first name will be displayed.
Delete Checked Customers	Delete the desired customer(s). Click this button after checking the box beside the customer(s) you want to delete. A warning is displayed. Click **OK** to complete the task. The deleted customers are removed from the **Inactive Customers** page, but remain in the system. ***Note:*** To delete an individual customer, click the **X** in the red square beside the customer ID.
Activate Checked Customers	Reactivate the desired customer(s). Click this button after checking the customer(s) you want to activate. The customers are moved to the **Active Customers** page. ***Note:*** To activate an individual customer, click the black arrow beside the customer ID.
ID	This column displays the Customer's unique ID.
Name	This column displays the Customer's Name.
Company	This column displays the Company that the customer is associated with.
Location	This column displays the customer's shipping location.

You can sort the inactive customers by clicking a column by which you want to sort. For example, you can sort by customer ID by clicking the **ID** heading. This displays the customers by customer ID in ascending/descending or alphabetical order depending on how your customer IDs are generated. To sort in reverse order, click the heading again.

You can view the details of a specific customer by clicking the customer's **ID**. The **View Customer** page is displayed. For more information on the **View Customer** page, see *The View Customer Page, page 22*.

The Create New Customer Page

The *Create New Customer* page allows you to enter a new customer to the Interchange customer database.

The fields displayed and the values accepted on this page will vary depending on how the Interchange Site Administrator set up the page. Figure 6 shows an example of the **Create New Customer** page.

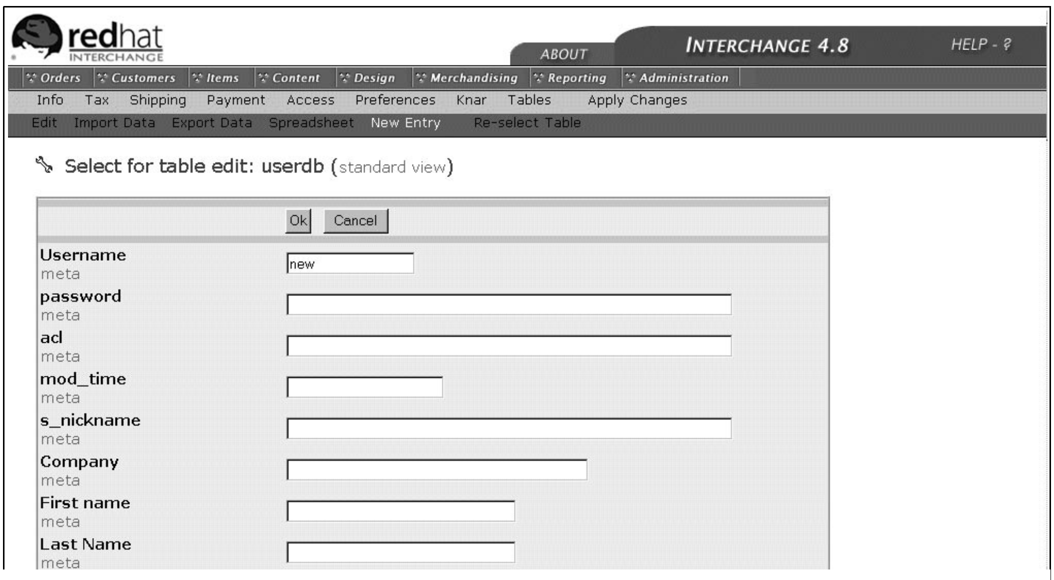


FIGURE 6: THE CREATE NEW CUSTOMER PAGE OF THE CUSTOMER SECTION

Table 6, page 21 describes the fields and buttons displayed on the **Create New Customer** page.

TABLE 6. The Create New Customer Page

FIELD/BUTTON/AREA	FUNCTION
Ok	Submit this page. Click this button after entering the necessary information to create a new customer.
Cancel	Exit the page without saving your information. You are returned to the **Active Customers** page.
User name	Enter the customer's user name.
password	Enter the customer's password used to access their account information from your site.
Company	Enter the customer's company name.
First name	Enter the customer's first name.
Last Name	Enter the customer's last name.
Address	Enter the customer's delivery street address.
City	Enter the customer's delivery city.
State	Enter the customer's delivery state.
Postcode	Enter the customer's delivery ZIP code.
Country	Enter the customer's delivery country.
Daytime Phone	Enter the customer's daytime phone number.
Billing First Name	Enter the billing contact's first name.
Billing Last Name	Enter the billing contact's last name.
Billing Address	Enter the billing contact's street address.
Billing City	Enter the billing contact's city.
Billing State	Enter the billing contact's state.
Billing Postcode	Enter the billing contact's ZIP code.
Billing Country	Enter the billing contact's country.
mv_credit_card_type	Enter the type of credit card used during purchase.
mv_credit_card_exp_month	Enter the credit card expiration month.
mv_credit_card_exp_year	Enter the credit card expiration year.
Email Address	Enter the customer's email address.
fax	Enter the customer's fax number.
Home Phone	Enter the customer's home phone number.
Payment method	Choose the customer's preferred payment method.

TABLE 6. The Create New Customer Page (Continued)

FIELD/BUTTON/AREA	FUNCTION
email_copy	Choose **Yes** if an email copy of the receipt should be sent to the customer.
mail_list	Click the mailing lists to which the customer is subscribing.
Dealer	Click **Yes** if the customer is a dealer and subject to special pricing.

The View Customer Page

The *View Customer* page allows you to view information about a customer. The View Customer page is accessed by clicking the customer's **ID** from the **Active** or **Inactive Customers** page. The **View Customer** page also allows you to access more detailed information through hotlinks. Figure 7 shows an example of the **View Customer** page.

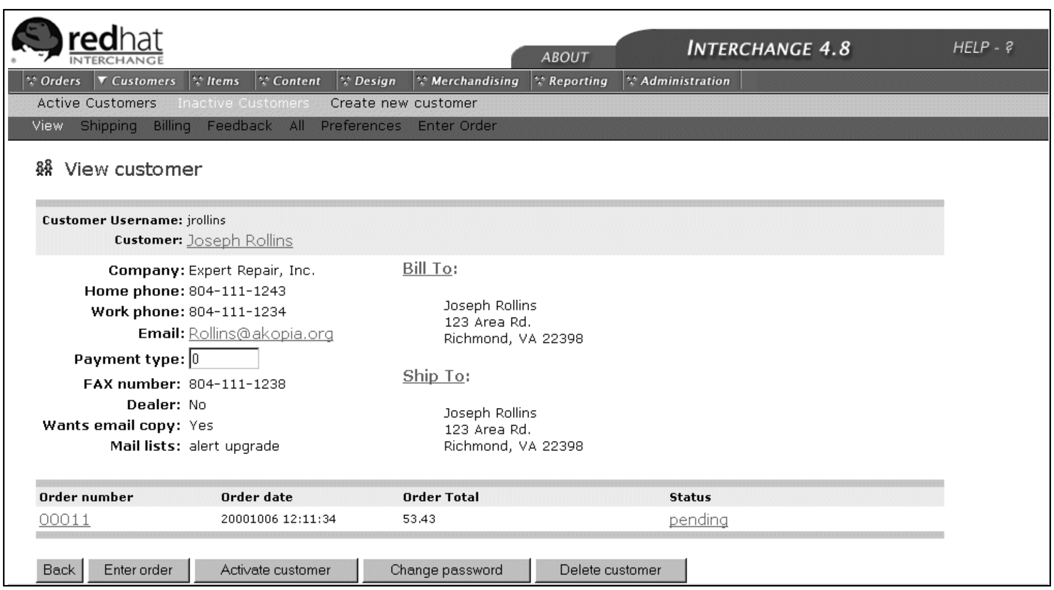


FIGURE 7: THE VIEW CUSTOMER PAGE OF THE CUSTOMERS SECTION

Table 7 describes the buttons and hotlinks displayed on the **View Customer** page.

TABLE 7. The View Customer Page

BUTTON/HOTLINK	FUNCTION
Back	Returns you to the previous page.
Enter order	Allows you to enter an order for this customer. The **Order Entry** page is displayed. It is pre-populated with the customer's information.
Deactivate customer	Moves the customer to the **Inactive Customer** area.
Change password	Lets you change the customer's log in password. This is usually done when the customer forgets their password and needs to enter a new one.
Delete Customer	Removes the customer.
Customer	Click the customer's name to access the **customer preferences** page. This page can also be accessed by clicking **Preferences** from the menubar.
Bill To	Click **Bill To** to access the **Customer billing information** page. This page can also be accessed by clicking **Billing** from the menubar.
Ship To	Click **Ship To** to access the **Customer shipping information** page. This page can also be accessed by clicking **Shipping** from the menubar.
Status	Click the order status from the **Status** column to access the **Order status** page.
Order Number	Click the order number from the **Order number** column to access the **View Order** page.

The Items Section

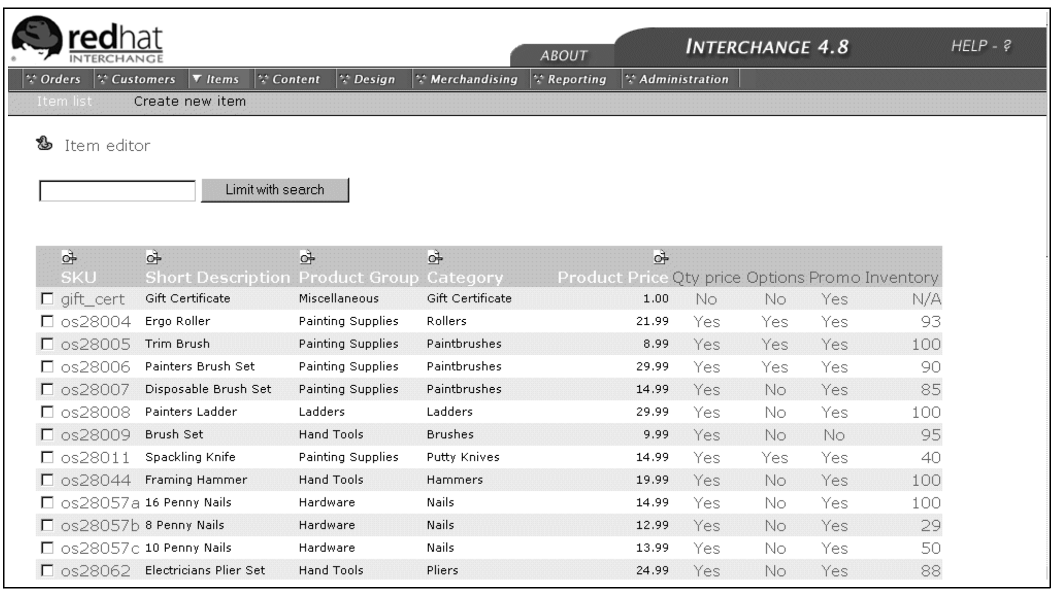
This section describes the following pages:

- The Item List Page
- The Item Editor Page
- The Quantity Pricing Page

- The Up-sell Page
- The Cross-sell Page
- The Promotion Page
- The Inventory Page
- The Create New Item Page

The Item List Page

The *Item List* page allows you to view item information and access specific information about an individual item. The **View Customer** page also allows you to access more detailed information through hotlinks. Figure 8 shows an example of the **Item List** page.



	SKU	Short Description	Product Group	Category	Product Price	Qty price	Options	Promo	Inventory
☐	gift_cert	Gift Certificate	Miscellaneous	Gift Certificate	1.00	No	No	Yes	N/A
☐	os28004	Ergo Roller	Painting Supplies	Rollers	21.99	Yes	Yes	Yes	93
☐	os28005	Trim Brush	Painting Supplies	Paintbrushes	8.99	Yes	Yes	Yes	100
☐	os28006	Painters Brush Set	Painting Supplies	Paintbrushes	29.99	Yes	Yes	Yes	90
☐	os28007	Disposable Brush Set	Painting Supplies	Paintbrushes	14.99	Yes	No	Yes	85
☐	os28008	Painters Ladder	Ladders	Ladders	29.99	Yes	No	Yes	100
☐	os28009	Brush Set	Hand Tools	Brushes	9.99	Yes	No	No	95
☐	os28011	Spackling Knife	Painting Supplies	Putty Knives	14.99	Yes	Yes	Yes	40
☐	os28044	Framing Hammer	Hand Tools	Hammers	19.99	Yes	No	Yes	100
☐	os28057a	16 Penny Nails	Hardware	Nails	14.99	Yes	No	Yes	100
☐	os28057b	8 Penny Nails	Hardware	Nails	12.99	Yes	No	Yes	29
☐	os28057c	10 Penny Nails	Hardware	Nails	13.99	Yes	No	Yes	50
☐	os28062	Electricians Plier Set	Hand Tools	Pliers	24.99	Yes	No	Yes	88

FIGURE 8: THE ITEM LIST PAGE OF THE ITEMS SECTION

Table 8 describes the fields and buttons displayed on the **Item List** page.

TABLE 8. The Item List Page

FIELD/BUTTON/AREA	FUNCTION
Limit with search	Search for a product by typing information about that product. Type all or partial SKU, Description, or price information in the field and click **Limit with search**.
Edit checked items in sequence	Edit the details of an item. Click this button after checking the box for the product(s) that you want to edit. The **Item Editor** page for each product you checked is presented in order.
Delete checked items	Delete an item. Click this button after checking the box for the product(s) that you want to delete. A warning is displayed. Click **Yes** to delete.
SKU	Displays the item detail page for an item. Click the product SKU to access the **Item Editor** page.
Qty pricing	Displays the quantity pricing edit page. Click **Yes**/**No** from the **Qty pricing** column to access the **Pricing** page. For more information on the **Qty pricing** page, see *The Quantity Pricing Page, page 44*.
Up-sell	Displays the up sell edit page. Click **Yes**/**No** from the **Up-sell** column to access the **Up-sell** page. For more information on the **Up-sell** page, see *The Up-sell Page, page 46*.
Cross-sell	Displays the cross-sell edit page. Click **Yes**/**No** from the **Cross-sell** column to access the **Cross-sell** page. For more information on the **Cross-sell** page, see *The Cross-sell Page, page 47*.
Promotion	Displays the promotion edit page. Click **Yes/No** from the **Promotion** column to access the **Promotion** page. For more information on the **Promotion** page, see *The Promotion Page, page 49*.
Inventory	Displays the inventory edit page. Click the number from the **Inventory** column to access the **Inventory** plage. For more information on the **Inventory** page, see *The Inventory Page, page 50*.

The Item Editor Page

The *Item Editor* page allows you to edit the details of an existing item or enter a new item. Figure 9, page 26, shows an example of the **Item Editor** page.

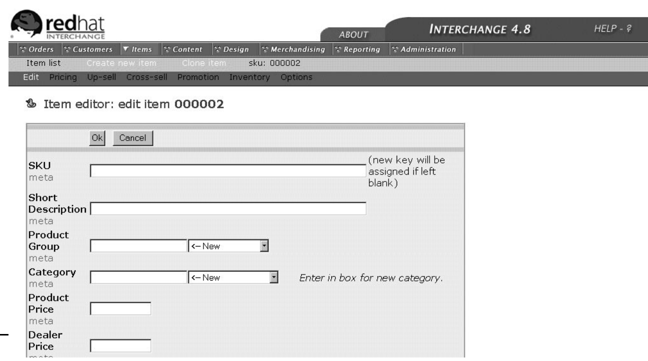


FIGURE 9: THE ITEM EDITOR PAGE OF THE ITEM SECTION

Table 9 describes the fields and buttons displayed on the **Item Editor** page.

TABLE 9. The Item Editor Page

FIELD/BUTTON/AREA	FUNCTION
OK	Submit this page. Click this button after making changes and/or additions to the information on this page
Cancel	Exit the page without saving your changes.You are returned to the **Item List** page.
Short Description	Enter a short description of the product.

TABLE 9. The Item Editor Page

FIELD/BUTTON/AREA	FUNCTION
Category	Enter the category under which the product should be displayed. If the category doesn't exist, enter it in the first field. If the category does exist, choose it from the drop down list in the second field.
Product Price	Enter the price of the product.
Image	The graphic file for the product. If the file has already been uploaded to the system, you can either type the file name in the first field, or choose it from the drop down list in the second field. If the file needs to be uploaded, click **upload…**.
Thumb	The "thumbnail" graphic for the product. This graphic is usually a smaller version of the image graphic. If the file has already been uploaded to the system, you can either type the file name in the first field, or choose it from the drop down list in the second field. If the file needs to be uploaded, click **upload…**.
Long Description	Enter a detailed description of the product.
Size	Enter the size of the product.
Color	Enter the color of the product.
Weight in pounds	Enter the weight of the product in pounds.

The Create New Item Page

The *Create New Item* page allows you to enter a new item or edit an existing item in the product database. Figure 10 shows an example of the **Create New Item** page. When creating a new item, you can access the Pricing, Up-sell, Cross-sell, Promotion, and Inventory pages from the menu to enter detailed merchandising information.

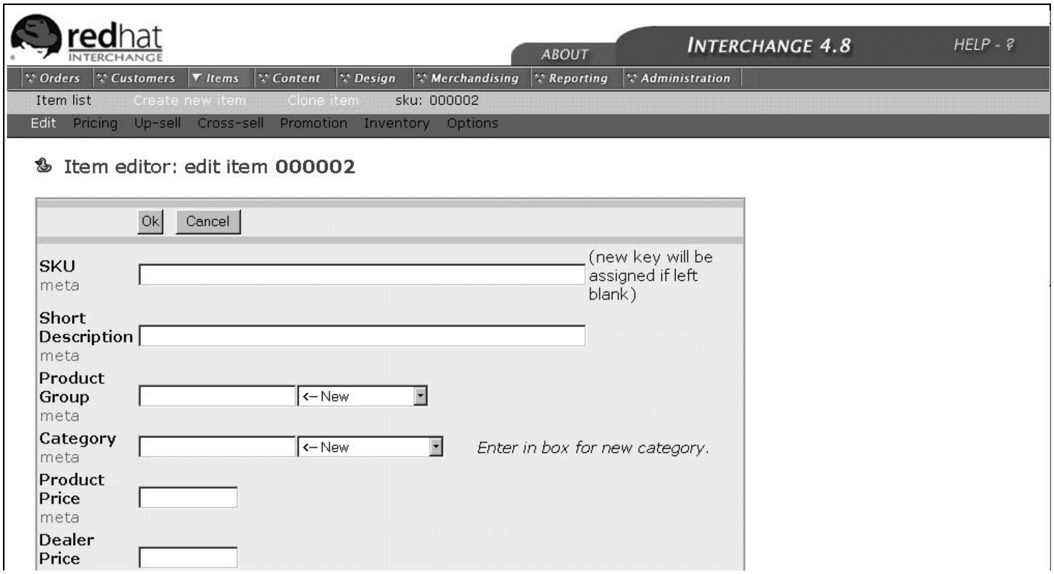


FIGURE 10: THE CREATE NEW ITEM PAGE OF THE ITEMS SECTION

Table 10 describes the fields and buttons displayed on the **Create New Item** page.

TABLE 10. The Create New Item Page

FIELD/BUTTON/AREA	FUNCTION
Ok	Submit this page. Click this button after making changes and/or additions to the information on this page.
Cancel	Exit the page without saving your changes.You are returned to the **Item List** page.
SKU	Enter the identifier to be used for this product.
Short Description	Enter a brief description of the product. This description is typically displayed with the Thumb graphic.

TABLE 10. The Create New Item Page

FIELD/BUTTON/AREA	FUNCTION
Product Group	Enter the group under which the product should be displayed. If the group doesn't exist, enter it i the first field. If the group does exist, choose it from the drop-down list in the second field. ***Note:*** The group displays the category, chosen in the next field. The category contains the product.
Category	Enter the category under which the product should be displayed. If the category doesn't exist, enter it in the first field. If the category does exist, choose it from the drop-down list in the second field.
Product Price	Enter the price of the product.
Dealer Price	Enter the special price offered to dealers.
Image	The graphic file for the product. If the file has already been uploaded to the system, you can either type the file name in the first field, or choose it from the drop-down list in the second field. If the file needs to be uploaded, click **upload...**.
Thumb	The "thumbnail" graphic for the product. This graphic is usually a smaller version of the **Image** graphic. If the file has already been uploaded to the system, you can either type the file name in the first field, or choose it from the drop-down list in the second field. If the file needs to be uploaded, click**upload...**.
Long Description	Enter a detailed description of the product. This description is typically displayed with the Image graphic.
Weight in pounds	Enter the weight of the product.
Gift certificate handling	Click **Yes** if gift certificates will be honored for this product. Click **No** if gift certificates will not be honored for this product.
Taxable	Click **Yes** if tax should be calculated during checkout for this product. Click **No** if tax should not be calculated for this product during checkout.

The Content Section

This section describes the Administration options relating to content management. It allows you to manage, create, and edit web pages.

The Page Editor Page

The *Page Editor* page allows you to download, edit, view, add, and upload the web pages of your e-commerce site. Figure 11 shows an example of the **Page Editor** page.

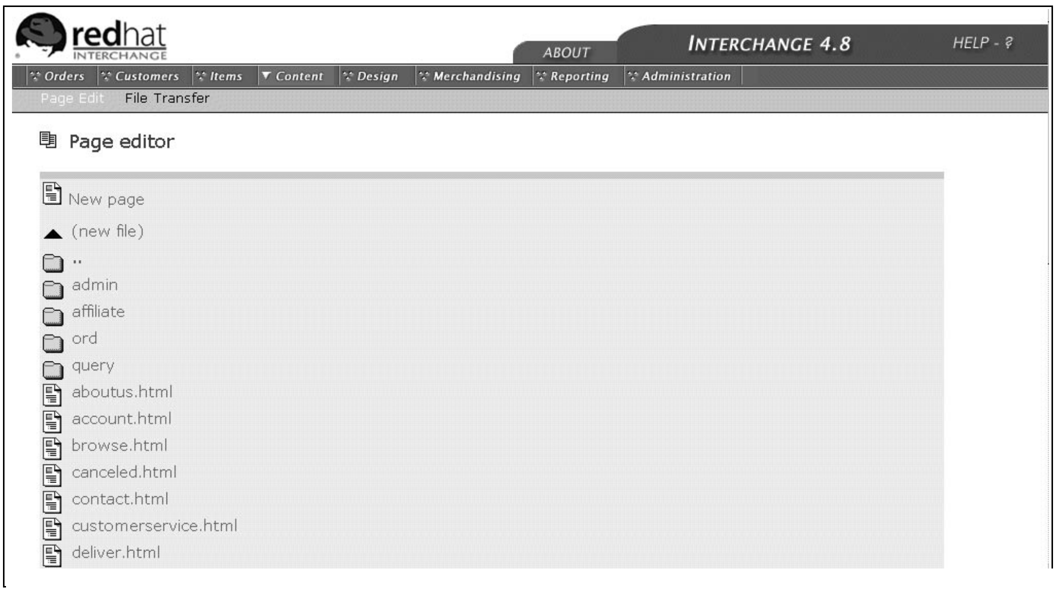


FIGURE 11: THE PAGE EDITOR PAGE

Table 11, page 31, explains the information displayed on the **Page Editor** page.

TABLE 11. The Page Editor Page

FIELD/BUTTON/AREA	FUNCTION
New Page	Allows you to create a new web page for your site. The **Create New Page** page is displayed. For more information on the **Create New Page** page, see *The Create New Page Page, page 31*.
New File	Allows you to upload a new file to your web page database.
..	Displays the directory above the current directory level.

The Create New Page Page

The *Create New Page* page allows you to build a new web page for your site using the Interchange templates. Figure 12 shows an example of the **Create New Page** page.

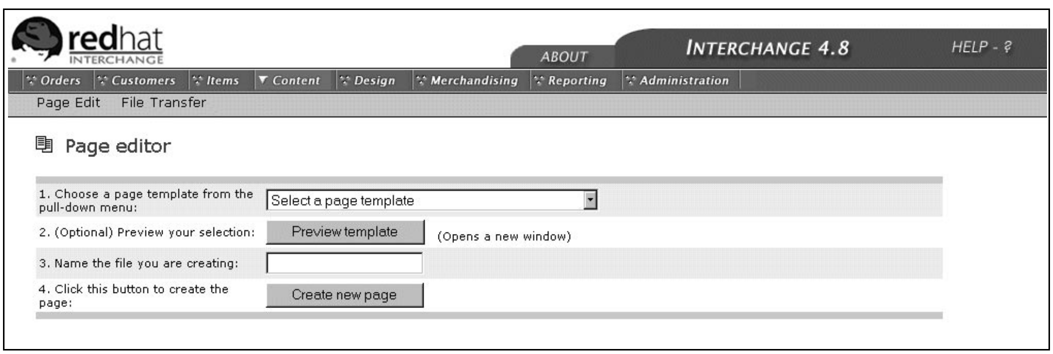


FIGURE 12: THE CREATE NEW PAGE PAGE OF THE CONTENT SECTION

Table 12, page 32, describes the fields and buttons displayed on the **Create New Page** page.

TABLE 12. The Create New Page Page

FIELD/BUTTON	FUNCTION
Select a page template	Use this pull-down menu to select a page template to be used to create this page.
Preview Template	Allows you to preview the page template.
Name the file you are creating	Enter the name of the new page you have created.
Create New Page	Click this button to create the new page. The *Edit Page Page* is displayed. This page allows you to edit your new web page.

The Edit Page Page

The *Edit Page* page allows you to edit the content and details associated with a web page. Figure 13 shows an example of the **Edit Page** page.

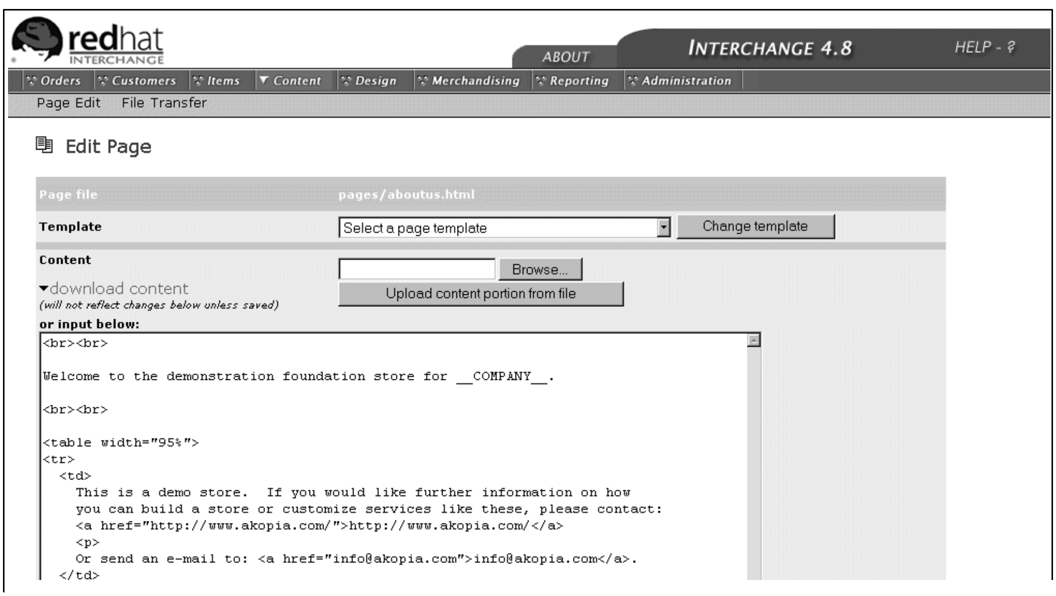


FIGURE 13: THE EDIT PAGE PAGE OF THE CONTENT SECTION

Table 13 describes the fields and buttons displayed on the **Edit Page** page.

TABLE 13. The Edit Page Page

FIELD/BUTTON	FUNCTION
Preview	Preview this page. Click this button after making changes and/or additions to the information on this page.
Save	Save this page. Click this button after making changes/ additions to the information on the page. It is recommended that you **Preview** the page before you save your changes. The changes are automatically made to this page on your website.
Cancel	Exit the page without saving your changes. You are returned to the **Page Editor** page.
Page File	Displays the directory path to this page for your reference.
Template	Choose a template to be used for this page.
Page title	Enter the title of this page.
Page banner	Enter the banner to be displayed at the top of this page. The default value is the **Page title**.
Members only	Click **Yes** if this page should be accessible only to customers logged on to your site. Click **No** if this page should be accessible to all customers.
Component before content	Choose the merchandising component to be displayed before the page content.
Component after content	Choose the merchandising component to be displayed after the page content.
Component items horizontal	Choose the number of items to be displayed on this page.
Before/after Banner	Choose the merchandising banner to be displayed before and after the page content.
Special tag	Choose the special tag you want to display in the content section.
Content	Click **Browse...** to access a saved content file. **OR** Enter text directly in the field provided.
Save template in page	Allows you to save this template in the page. This is useful if you want the current template to remain for this page after changes to the master template have been made.

The File Upload Page

The *File Upload* page provides a central location for uploading, downloading, deleting, and editing files. Figure 14, page 34, shows an example of the **File Upload** page.

FIGURE 14: THE FILE UPLOAD PAGE OF THE DESIGN SECTION

Table 14 describes the buttons and fields displayed on this page.

TABLE 14. The File Upload Page

BUTTON/FIELD	FUNCTION
(download)	Allows you to download a file from Interchange.
(upload)	Allows you to upload a file to Interchange. Displays the **Upload File** page.
(edit)	Displays the **Edit Page** page. This allows you to edit the item you have selected.
(delete)	Deletes the item you have selected. A warning is displayed. Click **Yes** to delete the item. Click **No** to cancel the command.

TABLE 14. The File Upload Page

BUTTON/FIELD	FUNCTION
(new file)	Displays the **Upload File** page. This allows you to upload a new file.
..	Displays the directory above the current directory level.

The Design Section

This section covers the following site design administration options:

- The Site Layout Page
- The Search Builder Page
- The Button Builder Page
- The Generate Static Page
- The File Transfer page (covered in content section, should be)
- The Page Edit Page (covered in content section)

The Site Layout Page

The *Site Layout* page allows you to group products into logical categories for display on your site. Figure 15, page 36, shows an example of the **Site Layout** page.

> ***Note:*** To display the entire **Site Layout** page, you must make a section from the **Area--Section** field. Figure 15, page 36, reflects the **Site Layout** page after such a selection has been made.

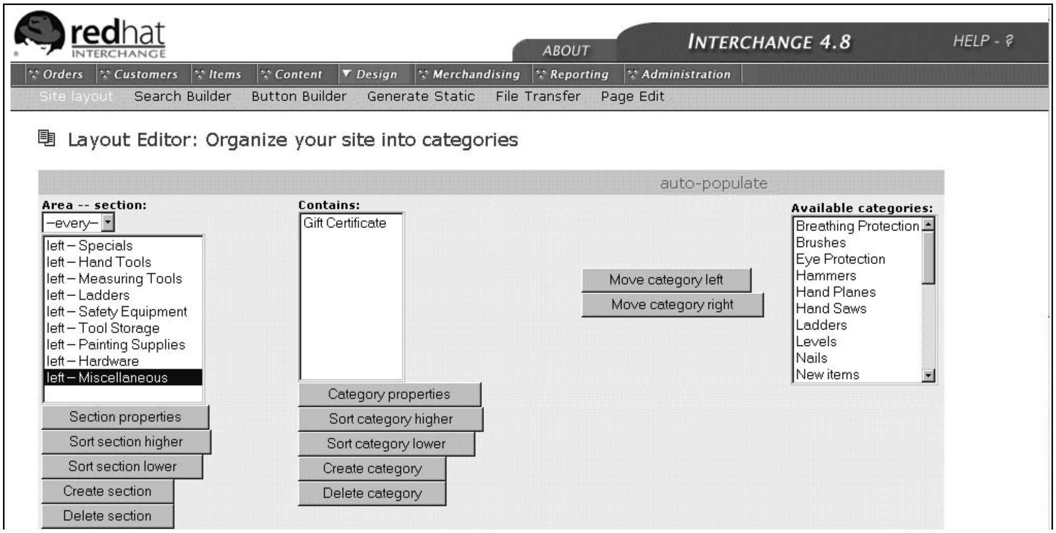


FIGURE 15: THE SITE LAYOUT PAGE OF THE DESIGN SECTION

Table 15 describes the fields and buttons displayed on the **Site Layout** page.

TABLE 15. The Site Layout Page

FIELD/BUTTON	FUNCTION
Area -- section	Select the section to which you want to add categories. For example, if **Hardware** is selected in the **Area -- Section** field, the products listed in the **Contains:** field will be The following action symbols are displayed under the **Area -- Section** field: • (edit)—edit the selected section in **Section Properties** area. • (move up)—moves the selected section up on the list. • (move down)—moves the selected section down on the list. • (add)—add a section to the list. • (delete)—remove a section from the list.
Contains:	Displays the current categories contained in the selected section. The following symbols are displayed under the **Contains** field: • (edit)—edit the selected section in **Section Properties** area. • (move up)—moves the selected section up on the list. • (move down)—moves the selected section down on the list. • (add)—add a section to the list. • (delete)—remove a section from the list.
Available categories:	Displays the possible categories that can be added to the selected section. To add a category to the **Contains:** field, select the category and click the arrow.
Name	The name of the section or category.
Page class	
Page area	The location of the section.
Link type	The type of link associated with the section or category.
Display type	How the section or category is displayed.

TABLE 15. The Site Layout Page

FIELD/BUTTON	FUNCTION
Link template	
Change area	Click to apply changes made in the **Section Properties** section.
Change category	Click to apply changes made in the **Category Properties** section.

The Search Builder Page

The *Search Builder* function allows you to build a specific search function to be used on your site. This search function helps customers to find the items they are looking for. Because it is difficult to build a search by hand, the **Search Builder** wizard walks you through the process by asking you questions. When you have finished building your search the Administration Tool produces code that you can cut and paste to your site.

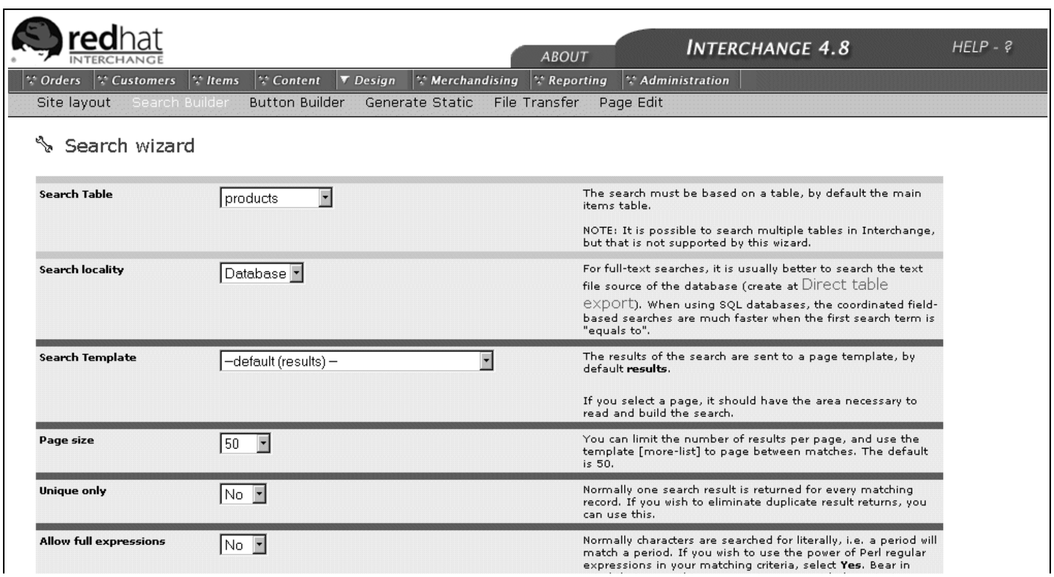


FIGURE 16: THE SEARCH BUILDER PAGE OF THE DESIGN SECTION

The Button Builder Page

The *Button Builder* page allows you to design, build, and connect links to be displayed on your affiliate's web sites. Because it is difficult to build a link to a specific product by hand, the **Button Builder** page walks you through the process. When you have finished building your link, the Administration Tool produces code that you can paste to your affiliate's site. It will direct the customer to a specific page containing the product(s) you are promoting at the affiliate site. Figure 17 shows an example of the **Button Builder** page.

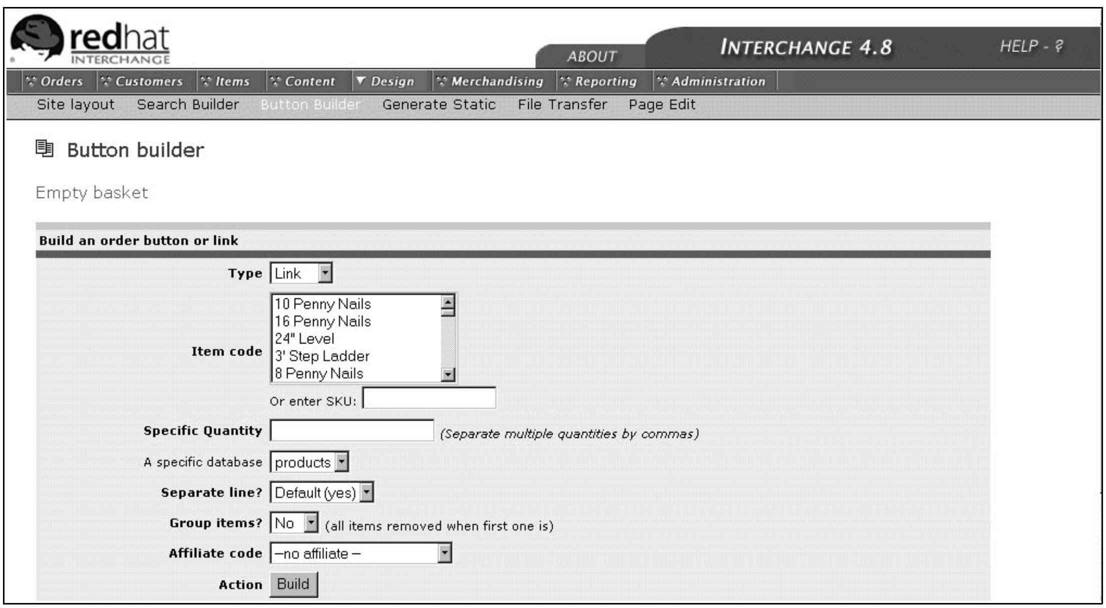


FIGURE 17: THE BUTTON BUILDER PAGE OF THE DESIGN SECTION

Table 16 describes the fields and buttons displayed on the **Button Builder** page.

TABLE 16. The Button Builder Page

FIELD/BUTTON	FUNCTION
Empty basket	Click this to clear any former test links or buttons from the basket.
Type	Choose the type of link you are creating.
Item code	Choose the product the link will access or enter the **SKU** in the field provided.
Specific Quantity	Enter the quantity of products the link will generate a purchase request for.
Separate line?	Click **Yes** if the link should appear on a separate line.
Group items?	Click **Yes** if subsequent items should be removed when a main item is removed.
size (if any)	Choose the size of the product that the link will generate a purchase request for.
color (if any)	Choose the color of the product that the link will generate a purchase request for.
Affiliate code	Choose the affiliate code to be associated with this link.
Description	Enter the description of the product to be included with the link. This applies to on-the-fly links only.
Price	Enter the price charged for the product.
Build	Click this button to build the link. The **resulting button** field is displayed with the generated code needed to create the link. Copy this code and place it on the desired page.

The Static Site Generation Page

The *Static Site Generation* page allows you to generate static pages to be used on your site. This is useful if you have pages for your site on which the content rarely changes. Because Interchange builds each page as it is called, having unchanging pages remain static can enhance the performance of your system. Figure 18, page 41, shows an example of the **Static Site Generation** page.

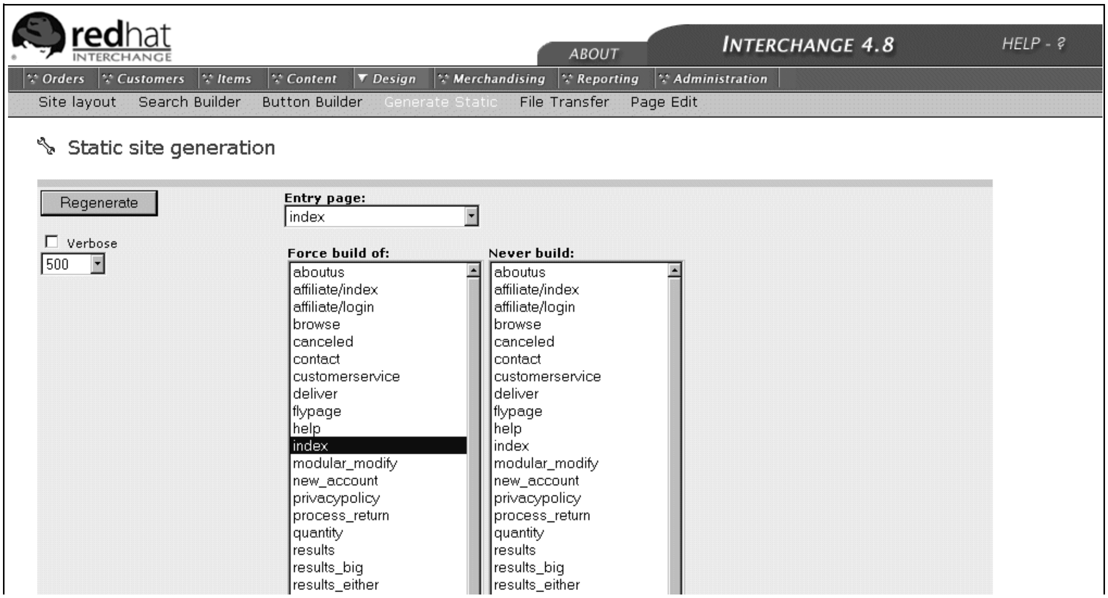


FIGURE 18: THE STATIC SITE GENERATION PAGE OF THE DESIGN SECTION

Table 17 describes the fields and buttons displayed on the **Static Site Generation** page.

TABLE 17. The Static Site Generation Page

FIELD/BUTTON	FUNCTION
Regenerate	Click this button after identifying pages that will be static.
Entry page	Choose the page of entry for accessing the static page.
Force build of	Choose the pages that you want to always be displayed as static. Use the **Shift** and **Ctrl** keys to select more than one page.

TABLE 17. The Static Site Generation Page

FIELD/BUTTON	FUNCTION
Never build	Choose the pages that you want to always be built dynamically. Use the **Shift** and **Ctrl** keys to select more than one page.
Verbose	Click this checkbox to limit the amount of links that can be followed.

The Merchandising Section

This section explains the following administration options:

- The Product Merchandising Page
- The Affiliates Page
- The Generate “others who...” Page
- The Create New Affiliate Page

The Product Merchandising Page

The *Product Merchandising* page allows you to view your products and their merchandising status. Figure 19 shows an example of the **Product Merchandising** page.

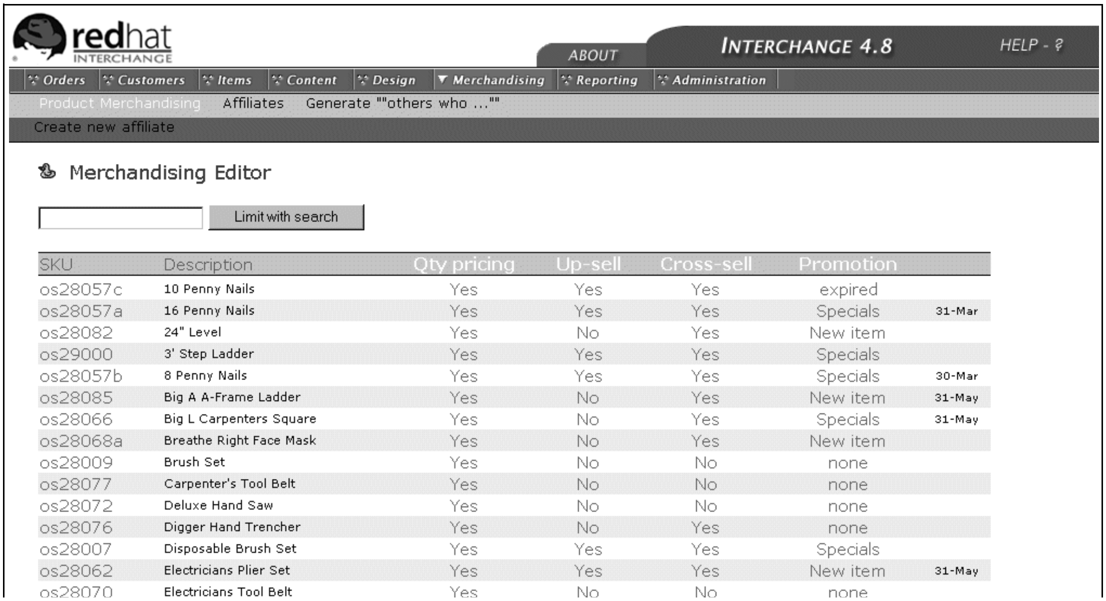


FIGURE 19: THE PRODUCT MERCHANDISING PAGE OF THE MERCHANDISING SECTION

Table 18 describes the buttons, fields, and hotlinks displayed on the **Product Merchandising** page.

TABLE 18. The Product Merchandising Page

FIELD/BUTTON/HOTLINK	FUNCTION
Limit with search	Search for a product by typing information about that product. Type all or partial information in the field and click this button.
SKU	Displays the item details for that product. Click the SKU to access the **Item Edit** page.
Qty Pricing	Displays the quantity pricing edit page for that product. Click **Yes/No** from the **Qty pricing** column to access the **Pricing** page.

TABLE 18. The Product Merchandising Page

FIELD/BUTTON/HOTLINK	FUNCTION
Up-sell	Displays the up-sell edit page for that product. Click **Yes/No** from the **Up-sell** column to access the **Up-sell** page.
Cross-sell	Displays the cross-sell page for that product. Click **Yes/No** from the **Cross-sell** column to access the **Cross-sell** page.
Promotion	Displays the promotion page for that product. Click the promotion type from the **Promotion** column to access the **Promotion** page.

On the **Product Merchandising** page, you can sort the product list by clicking the column by which you want to sort. For example, you can sort by SKU by clicking the **SKU** heading. This displays the products in ascending/descending or alphabetical order by SKU. To sort in reverse order, click the heading again.

The Quantity Pricing Page

The *Quantity Pricing* page allows you to calculate and offer special pricing for products that are bought in quantity. Figure 20, page 45, shows an example of the **Quantity Pricing** page.

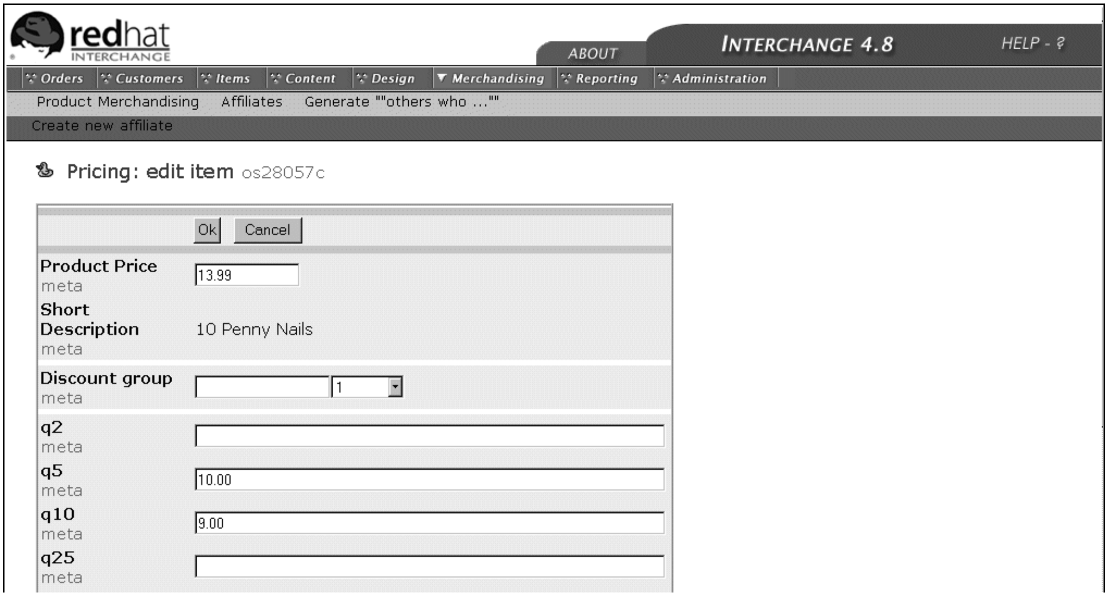


FIGURE 20: THE QUANTITY PRICING PAGE OF THE ITEMS SECTION

Table 19 describes the fields and buttons displayed on the **Quantity Pricing** page.

TABLE 19. The Quantity Pricing Page

FIELD/BUTTON/AREA	FUNCTION
OK	Submit this page. Click this button after making changes and/or additions to the information on this page
Cancel	Exit the page without saving your changes. You are returned to the **Item List** page.
Product Price	Enter the price of the product.
Short Description	Lists the short description of the product for your reference.
Q2	Enter the discount price of the product when purchased in quantities of two or more.

TABLE 19. The Quantity Pricing Page

FIELD/BUTTON/AREA	FUNCTION
Discount group	Specify the discount group for the product. This discount will be applied when the code is entered during the checkout process. ***Note:*** A discount group can be added to the menu from the pricing table.
Q5	Enter the discount price of the product when purchased in quantities of five or more.
Q10	Enter the discount price of the product when purchased in quantities of ten or more.
Q25	Enter the discount price of the product when purchased in quantities of 25 or more.
Q100	Enter the discount price of the product when purchased in quantities of 100 or more.
Auto-export	marker

The Up-sell Page

The *Up-sell* Page allows you to enter item or items that may be of higher quality or better functionality then another item in your inventory. When a customer places an item in his or her shopping cart, you can display a list of automatically generated up-sell items to entice the customer to buy the higher quality merchandise. Figure 21 shows an example of the **Up-sell** page.

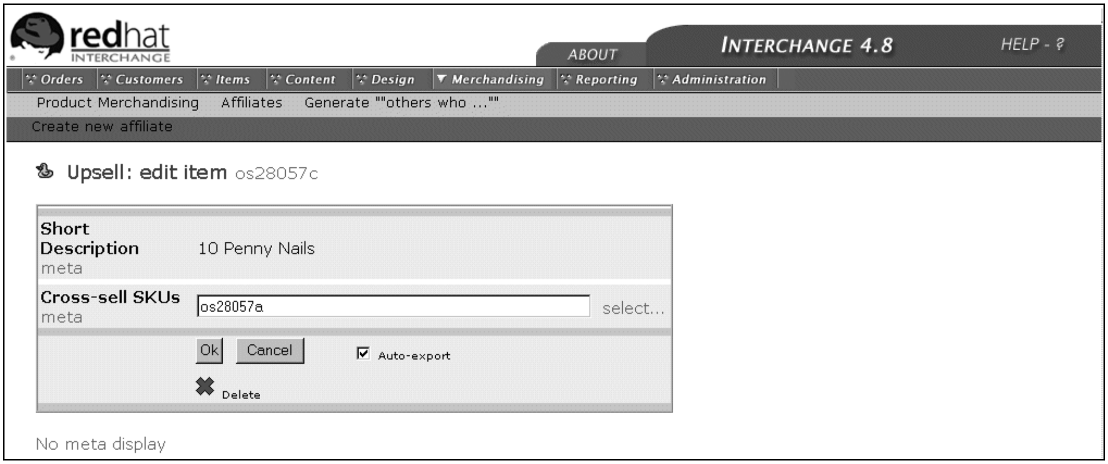


FIGURE 21: THE UP-SELL PAGE OF THE ITEMS SECTION

Table 20 describes the fields and buttons displayed on the **Up-sell** page.

TABLE 20. The Up-sell Page

FIELD/BUTTON/AREA	FUNCTION
Ok	Submit this page. Click this button after making changes and/or additions to the information on this page.
Cancel	Exit the page without saving your changes. You are returned to the **Item Edit** page for the product.
Upsell SKUs	Enter the SKU(s) of the item(s) to which this product can be upsold. If entering more than one SKU, separate each with a space.
Auto-export	marker

The Cross-sell Page

The *Cross-sell* page allows you to promote items that compliment the item that is being purchased. Figure 22 shows an example of the **Cross-sell** page.

FIGURE 22: THE CROSS-SELL PAGE OF THE ITEMS SECTION

Table 21 describes the fields and buttons displayed on the **Cross-sell** page.

TABLE 21. The Cross-sell Page

FIELD/BUTTON/AREA	FUNCTION
Ok	Submit this page. Click this button after making changes and/or additions to the information on this page.
Cancel	Exit the page without saving your changes. You are returned to the **Edit Item** page.
Short Description	Lists the short description of the product for your reference.
Cross-sell SKUs	Enter the SKU(s) of the item(s) that will be cross sold with this product. If entering more than one SKU, separate each with a space.
Cross-sale category	Choose a category to be cross sold with this product. This option is typically used if there are no specific items that fit the cross-sell concept. For example, the hammers category can be cross-sold to the nails category.

TABLE 21. The Cross-sell Page

FIELD/BUTTON/AREA	FUNCTION
Teaser	Enter a catch line to be displayed before the cross-sell items are listed. For example, “If you like this, you’ll love...”
Closer	Enter closing text to be placed below a cross-sell items.

The Promotion Page

The *Promotion* page allows you to promote special or sale items during the purchase. Figure 23, page 49, shows an example of the **Promotion** page.

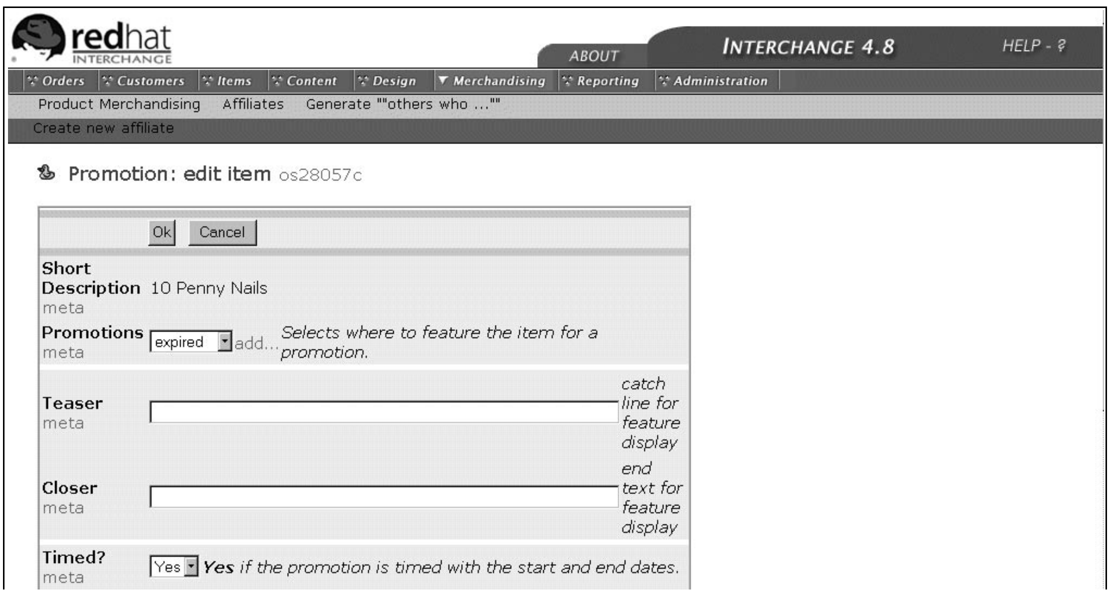


FIGURE 23: THE PROMOTION PAGE OF THE ITEMS SECTION

Table 22 describes the fields and buttons displayed on the **Promotion** page.

TABLE 22. The Promotion Page

FIELD/BUTTON/AREA	FUNCTION
Ok	Submit this page. Click this button after making changes and/ or additions to the information on this page
Cancel	Exit the page without saving your changes. You are returned to the **Item Edit** page.
Short Description	Lists the short description of the product for your reference.
Promotions	Choose the area where the product should be promoted. For example, the **Specials** area or the **New Items** area could be used.
Teaser	Enter a catch line to be displayed before the promotional items are displayed. For example, “Don’t forget to stock up for the holiday on...”
Closer	Enter closing text to be placed below the promotional items. For example, “While supplies last!”
Timed?	Click **Yes** if the promotion for this product will last a specified length of time. Click **No** if the promotion for this product will last indefinitely.
Start date	If the promotion is timed, enter the date on which the promotion will start.
End date	If the promotion is timed, enter the date on which the promotion will end.
Auto-export	
Delete	Click the **X** to delete this item. A warning is displayed. Click **OK** to complete the task.

The Inventory Page

The *Inventory* page allows you to track your inventory supply. Figure 24 shows an example of the **Inventory** page.

> ***Note:*** Interchange can also be integrated with your existing database to track inventory.

FIGURE 24: THE INVENTORY PAGE OF THE ITEMS SECTION

Table 23 describes the fields and buttons displayed on the **Inventory** page.

TABLE 23. The Inventory Page

FIELD/BUTTON/AREA	FUNCTION
Ok	Submit this page. Click this button after making changes and/or additions to the information on this page
Cancel	Exit the page without saving your changes. You are returned to the **Edit Item** page.
Short Description	Lists the short description of the product for your reference.
On hand	Enter the amount of the product currently in stock. Once this amount is entered, Interchange will keep track of inventory depletion.
Out of stock message	Choose the message to be displayed to the customer when the item is out of stock.
account	Enter the account number to be associated with this item. The account could be associated with many functions, including reordering.

TABLE 23. The Inventory Page

FIELD/BUTTON/AREA	FUNCTION
COGS Account	Enter the Cost of Goods Sold account number. This number can be used for interfacing with backend accounting systems.
Auto-export	marker

marker

The Affiliates Page

The *Affiliates* Page allows you to do direct marketing on a partner web site. After reaching an agreement with your partner site, you can set up a link that will direct traffic to your site. Figure 25 shows an example of the **Affiliates** page.

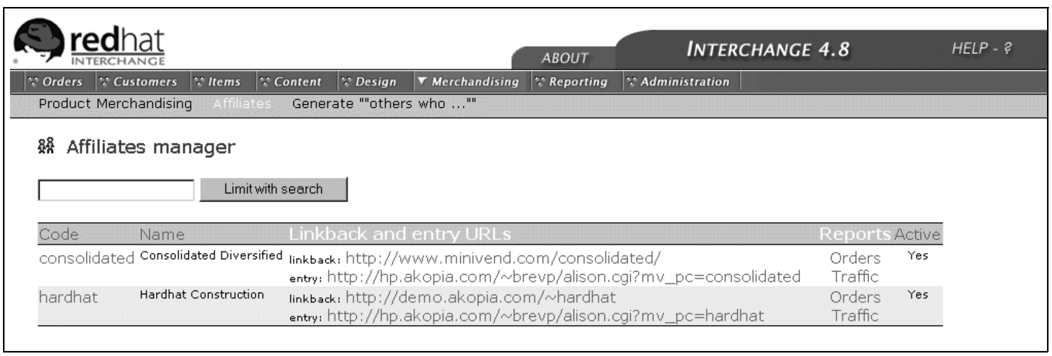


FIGURE 25: THE AFFILIATES PAGE OF THE MERCHANDISING SECTION

Table 24 describes the fields and buttons displayed on the **Affiliates** page.

TABLE 24. The Affiliates Page

FIELD/BUTTON	FUNCTION
Limit with search	Type the parameter by which you want to search. You can enter either a whole or partial value. A list of affiliates containing that value is displayed.
Code	Click the affiliate code to display detailed information about that affiliate.
Linkback and entry URLs	Click the **Linkback** URL to access the affiliate's page where your entry link is displayed. Click the **entry** URL to access the entry page for customers coming from the affiliate's site.
Reports	Click the report you want to access for this affiliate.

On the **Affiliates** page, you can sort the affiliate list by clicking the heading of the column by which you want to sort. For example, to sort the affiliates in alphabetical order, click the **Name** heading. To sort in reverse order, click the heading again.

The Generate "others who" Page

The *Generate "others who"* page allows you to dynamically generate a list of products to be displayed during a customer checkout. This list consists of products that other customers purchased at the same time as the current customer's purchase. The customer purchasing can then click on the product to view more information about it. This page is updated on the fly to display the latest list of products. Figure 26 shows an example of the compiled **Generate "others who"** page.

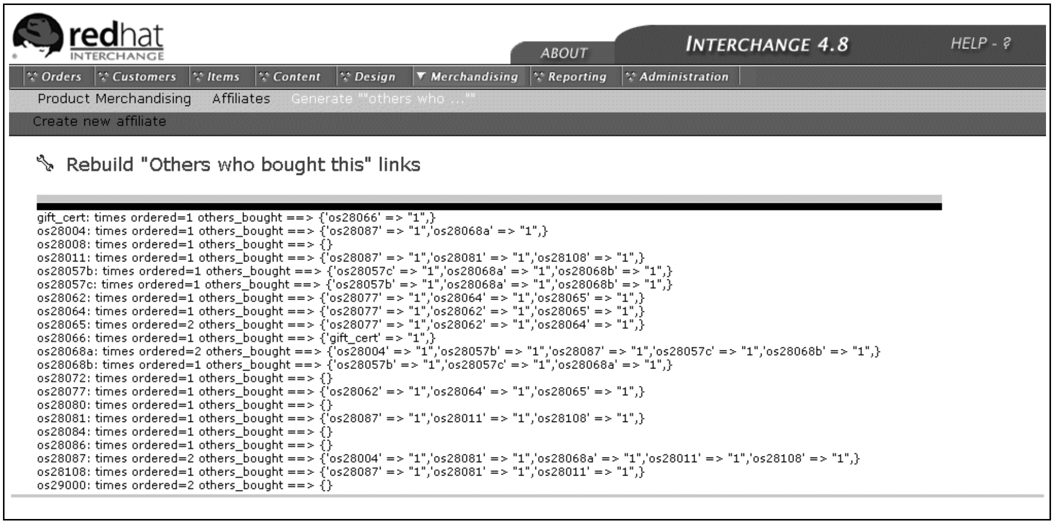


FIGURE 26: THE GENERATE "OTHERS WHO" PAGE OF THE MERCHANDISING SECTION

The Create New Affiliate Page

The *Create New Affiliate* page allows you to identify and set up a new affiliate for your e-business. Figure 27 shows an example of the **Create New Affiliate** page.

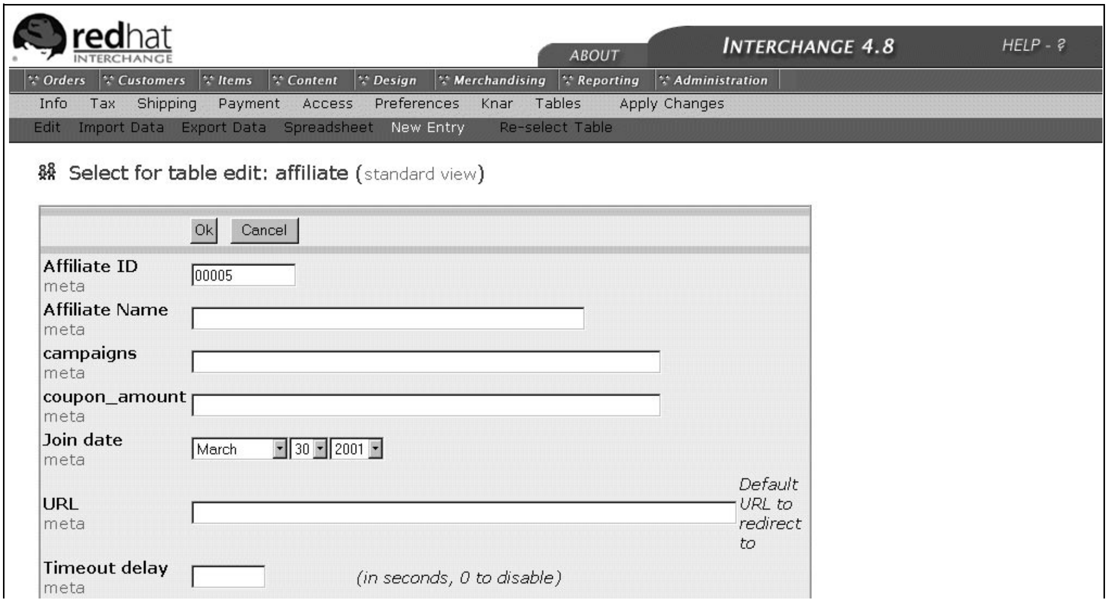


FIGURE 27: THE CREATE NEW AFFILIATE PAGE OF THE MERCHANDISING SECTION

Table 25 describes the fields and buttons displayed on the **Create New Affiliate** page.

TABLE 25. The Create New Affiliate Page

FIELD/BUTTON	FUNCTION
Ok	Submit this page. Click this button after entering the affiliate information on this page.
Cancel	Exit the page without saving your changes. You are returned to the **Affiliates** page.
Affiliate ID	Enter an identification value to be used for this affiliate
Affiliate Name	Enter the name of the affiliate you are creating.
campaigns	Enter the promotion associated with this affiliate.
coupon_amount	Enter the discount amount applied to purchases made at this affiliate.

TABLE 25. The Create New Affiliate Page

FIELD/BUTTON	FUNCTION
Join date	Choose the date that the affiliate was added to your system. The default value is the current date.
URL	Enter the URL to which the affiliate link will direct the customer on your site.
Timeout delay	Enter the amount of time, in seconds, the system will attempt to contact the affiliate before timing out.
active	Enter **Yes** if the affiliate account being created should be activated.
password	Enter the password to be associated with this affiliate.
image	Enter the path to the image used with this affiliate. This image is displayed on the page in your site to which the customer is directed.

The Reporting Section

The pages in this section allow you to generate reports to keep track of purchases and traffic trends.

The Order Statistics Page

The *Order Statistics* page allows you to access various report information. Figure 28 shows an example of the **Order Statistics** page.

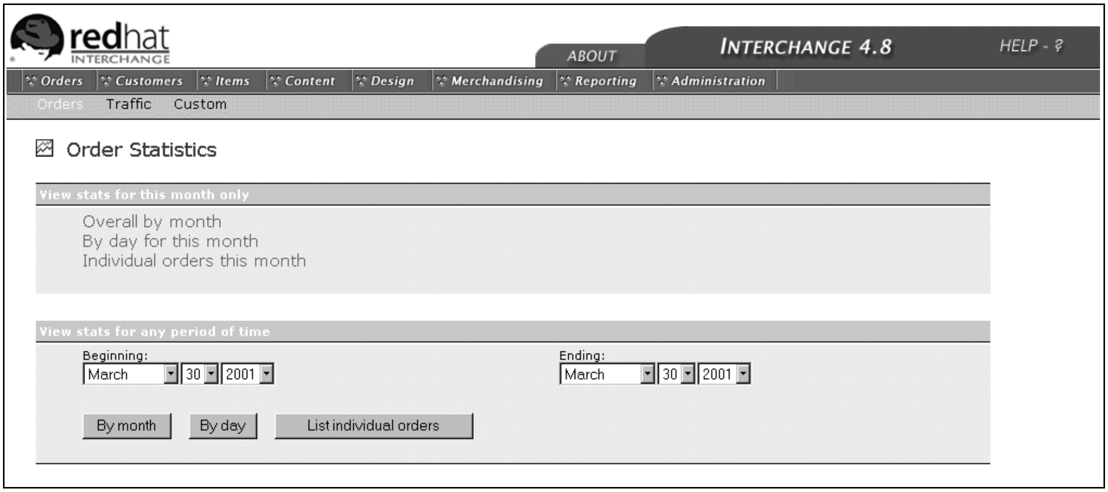


FIGURE 28: THE ORDER STATISTICS PAGE OF THE REPORTING SECTION

Table 26 describes the fields and buttons displayed on the **Order Statistics** page.

TABLE 26. The Order Statistics Page

FIELD/BUTTON	FUNCTION
Overall by month	Lists the number of orders and transaction amount by month.
By day for this month	Lists the number of orders and transaction amount by day for the month.
Individual orders this month	Lists each individual order and transaction amount placed each day in the month.
Beginning	Enter a start date to limit the search for order statistics.
Ending	Enter an end date to limit the search for order statistics.
By month	After choosing a **Beginning** and **Ending** date, click this button to display the order statistics for the month(s) chosen.

TABLE 26. The Order Statistics Page

FIELD/BUTTON	FUNCTION
By day	After choosing a **Beginning** and **Ending** date, click this button to display the order statistics for the day(s) chosen.
List individual orders	After choosing a **Beginning** and **Ending** date, click this button to display the order statistics for each individual order entered in that time frame.

The Traffic Statistics Page

The *Traffic Statistics* page allows you to access statistical information on the traffic to your web site. Figure 29, page 58, shows an example of the **Traffic Statistics** page.

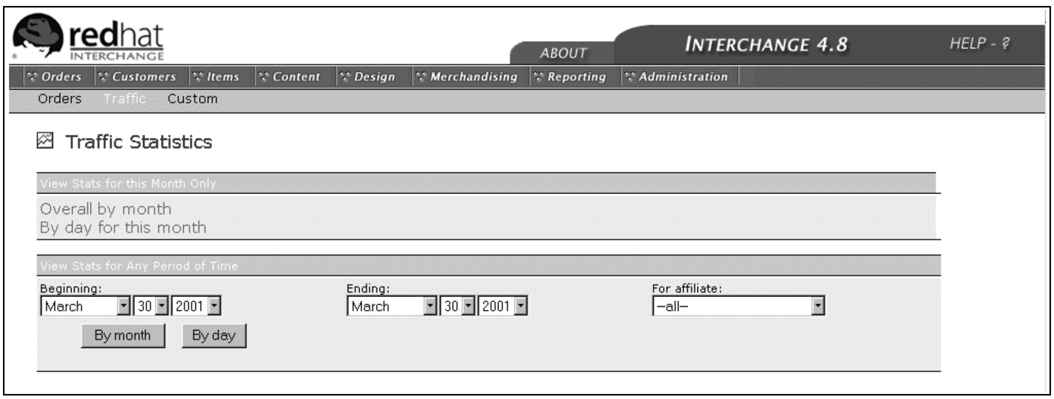


FIGURE 29: THE TRAFFIC STATISTICS PAGE OF THE REPORTING SECTION

Table 27 describes the fields and buttons displayed on the **Traffic Statistics** page.

TABLE 27. The Traffic Statistics Page

FIELD/BUTTON	FUNCTION
Overall by month	Lists the traffic statistic details by month.
By day for this month	Lists the traffic statistic details by day for the month.

TABLE 27. The Traffic Statistics Page

FIELD/BUTTON	FUNCTION
Beginning	Enter a start date to limit the search for traffic statistics.
Ending	Enter an end date to limit the search for traffic statistics.
For affiliate	Choose the affiliate for which you are retrieving traffic statistics.
By month	After choosing a **Beginning** and **Ending** date, click this button to display the traffic statistics for the month(s) chosen.
By day	After choosing a **Beginning** and **Ending** date, click this button to display the traffic statistics for the day(s) chosen.

The Custom Reports Page

The *Custom Reports* page allows you to create a custom report. Figure 30, page 59, shows an example of the **Custom Reports** page.

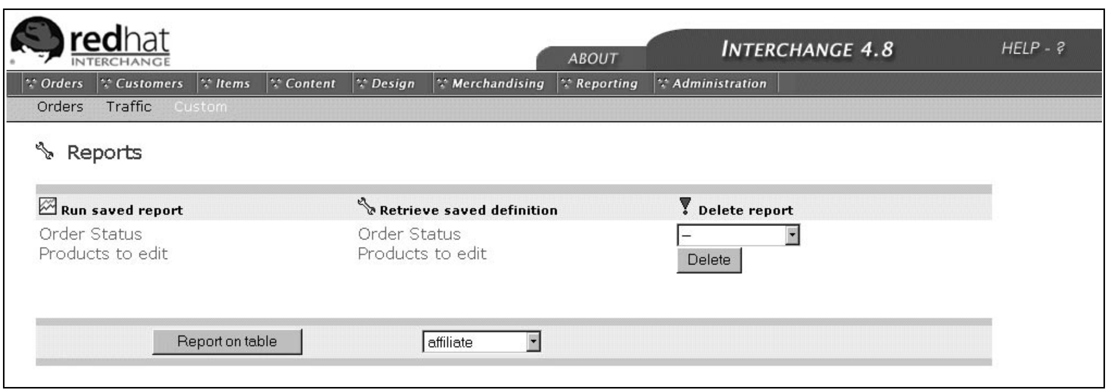


FIGURE 30: THE CUSTOM REPORTS PAGE OF THE REPORTING SECTION

Table 28 describes the fields and buttons displayed on the **Custom Reports** page.

TABLE 28. The Custom Reports Page

FIELD/BUTTON	FUNCTION

The Administration Section

This section describes the Administration Section of the Administration tool, including the following:

- The Info Page
- The Tax Page
- The Shipping Page
- The Payment Page
- The Access Page
- The Preferences Page
- The Knar Page
- The Tables Page

The Info Page

The *Info* page provides a summary of your Interchange settings and information.

The information displayed on the Info page refers to your system. This information provides a snapshot view of your system settings. The following sections of information are displayed:

- Catalog Information—displays your catalog location and error information, as well as any active sessions on your site.
- Interchange Server Information—displays Interchange version information as well as Interchange activity.
- Perl Information—displays information on the Perl modules you are running
- Database Information—displays information on the database interfaces you are using as well as a listing of the database tables existing in your system. For more information on the tables displayed, see *The Tables Page, page 68*.

The Tax Page

The *Tax* page allows you to add tax calculation configurations for states. Figure 31 shows an example of the **Tax** page.

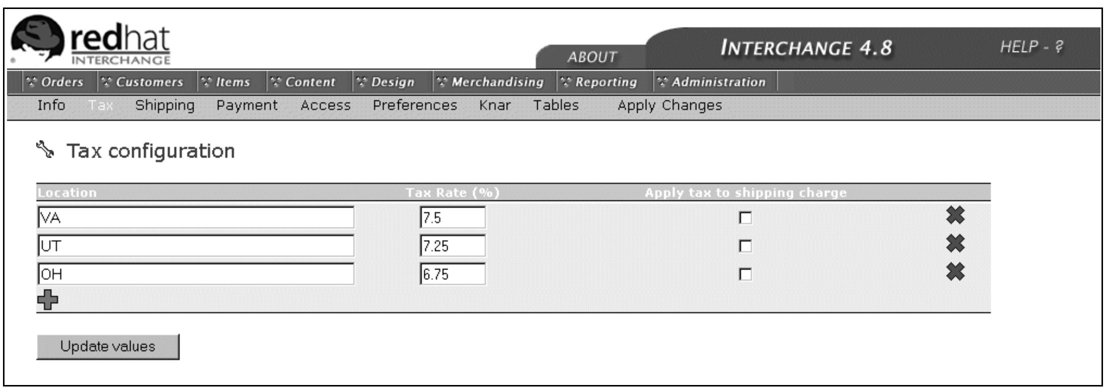


FIGURE 31: THE TAX PAGE OF THE ADMINISTRATION SECTION

Table 29, page 62, describes the fields and buttons displayed on the **Tax** page.

TABLE 29. The Tax Page

FIELD/BUTTON	FUNCTION
Location	Enter your business location to which the tax rate will be applied. For example, if you have a distributor shipping from California, you would enter tax rate information for that state.
Tax Rate (%)	Enter the percent tax rate to be used in calculating the tax amount for that location.
Apply tax to shipping charge	Click this checkbox if the tax rate should be applied after the shipping charge has been added to the total order.
Update values	Click this button to apply your new tax settings.
(new)	Click this button to add a new tax location to your tax configuration.
(delete)	Click this button to delete a tax location.

Note: If you are unsure of how to handle taxation calculation for your business, contact your local Better Business Bureau.

The Shipping Page

The *Shipping* page allows you to specify the shipping methods you will offer to your customers. Figure 32, page 63, shows an example of the **Shipping** page.

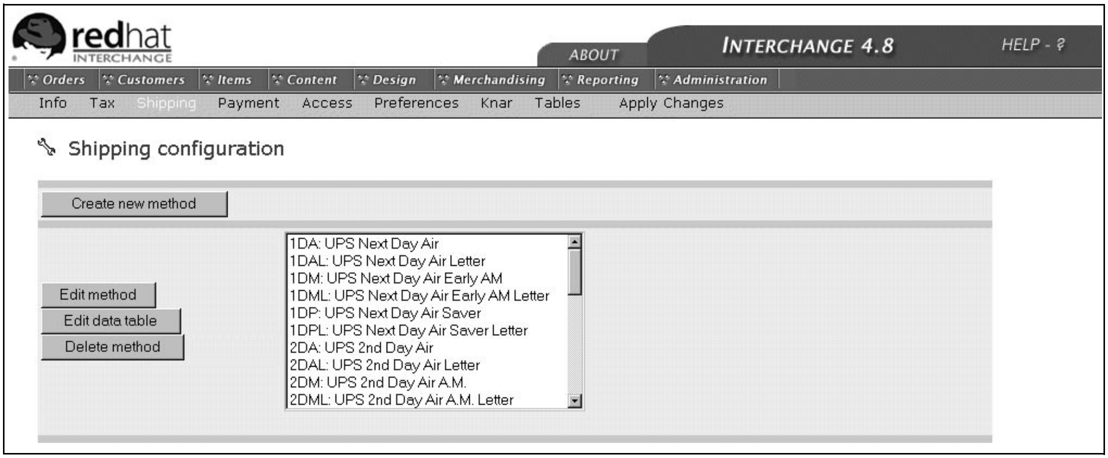


FIGURE 32: THE SHIPPING PAGE OF THE ADMINISTRATION SECTION

Table 30 describes the buttons and fields displayed on the **Shipping** page.

TABLE 30. The Shipping Page

BUTTON/FIELD	FUNCTION
Create new method	Click this to access the **Shipping Options** page. It allows you to create a new shipping method.
Edit method	Click this button after choosing the shipping option that you want to edit. The **Shipping Options** page for that shipping option is displayed.
Edit data table	Click this button after choosing a shipping option. Enter values in the **Start range** and **End range** that represent weight ranges. Choose the type of charge method from the **Charge type** column. Enter the method for calculating the final price.
Delete Method	Click this button to delete the selected shipping option(s).

The Payment Page

The *Payment* page allows you to choose the payment methods you accept. Figure 33 shows an example of the **Payment** page.

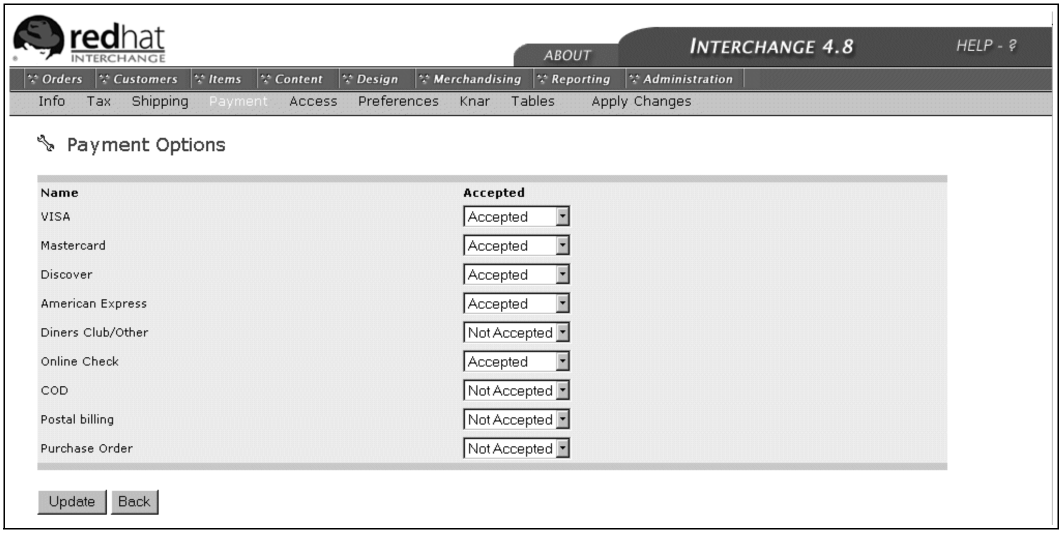


FIGURE 33: THE PAYMENT PAGE OF THE ADMINISTRATION SECTION

Table 31 describes the fields and buttons displayed on the **Payment** page.

TABLE 31. The Payment Page

FIELD/BUTTON	FUNCTION
Update	Click this button to after you have made changes to the payment options you accept. Interchange is updated with the new payment settings.
Back	Click this button to return to the **Info** page without saving your changes.
Accepted	In this column, click **Accepted** from the drop-down menu if you accept that method of payment. Click **Not Accepted** if you do not accept that method of payment.

The Access Page

The *Access* page allows you to create users and login profiles for the Administration tool. Figure 34 shows an example of the **Access** page.

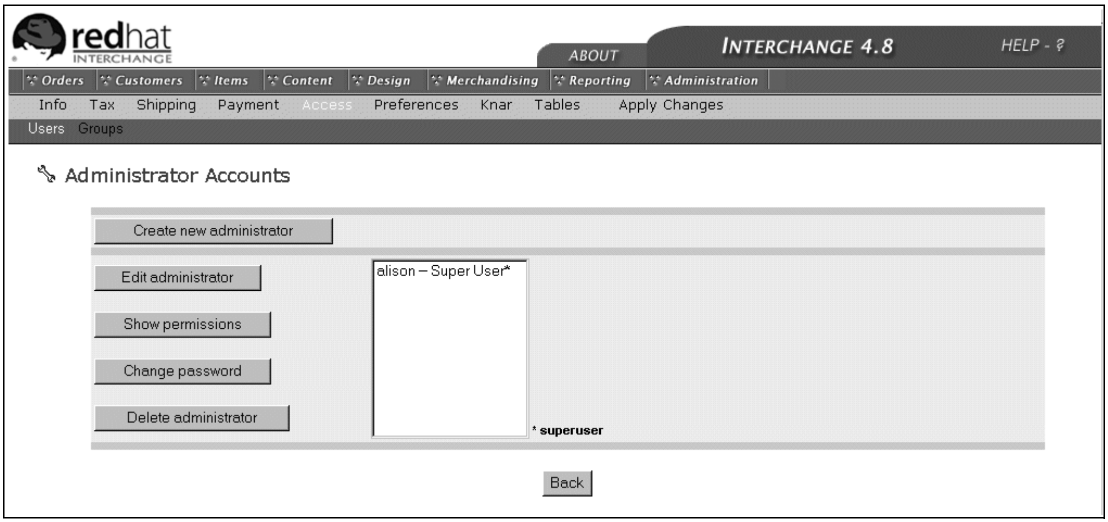


FIGURE 34: THE ACCESS PAGE OF THE ADMINISTRATION SECTION

Table 32 describes the fields and buttons displayed on the **Access** page.

TABLE 32. The Access Page

FIELD/BUTTON	FUNCTION
Create new administrator	Click this button to add an Interchange associate to the Interchange system.
Edit administrator	Click this button after choosing a user from the list. This section allows you to edit the profile of that user.
Show permissions	Click this button after choosing a user from the list. This section allows you to view and edit the accessibility permissions for that user.

TABLE 32. The Access Page

FIELD/BUTTON	FUNCTION
Change password	Click this button after choosing a user from the list. This section allows you to change the access password for that user.
Delete administrator	Click this button after choosing a user from the list to delete that user from the Interchange system. A warning is displayed. Click **OK** to continue. The user is deleted from the system.
Back	Click this button to return to the

The Preferences Page

The *Preferences* page allows you to alter preferences for the Administration tool. Figure 35 shows an example of the **Preferences** page.

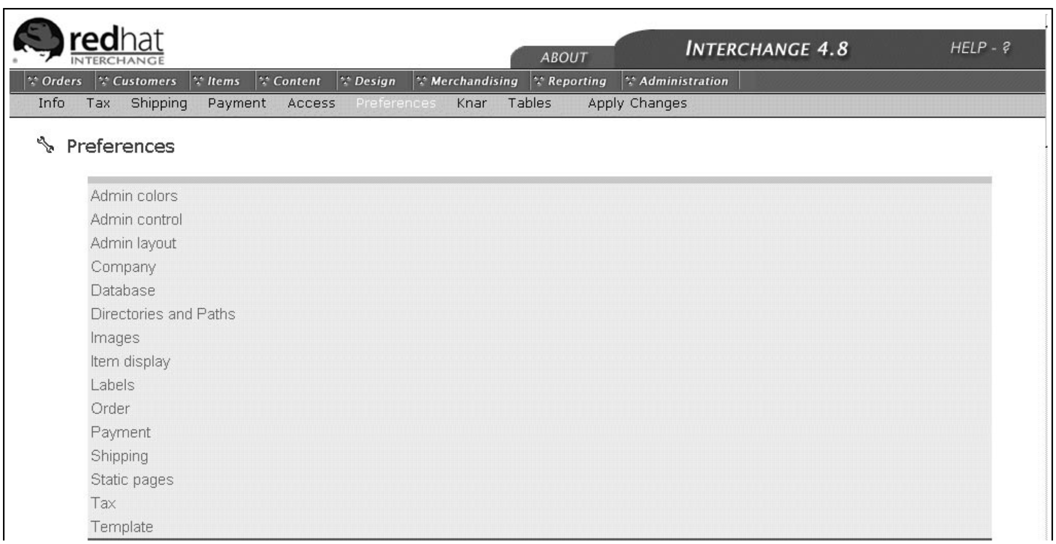


FIGURE 35: THE PREFERENCES PAGE OF THE ADMINISTRATION SECTION

Table 33, page 67, describes the fields and buttons displayed on the **Preferences** page.

TABLE 33. The Preferences Page

FIELD/BUTTON	FUNCTION
Admin colors	Displays the preferences set for the Administration Tool color scheme.
Admin control	Displays the preferences set for how the Administration Tool is accessed.
Admin layout	Displays the preferences set for the links accessible from the Administration Tool.
Company	Displays the preferences set for your company's contact information.
Customer display	Displays the preferences set for the number of companies displayed per page in the Administration Tool.
Database	Displays the preferences set for the database type(s) used with Interchange.
Directories and Paths	Displays the preferences set for accessing URLs and directories in Interchange.
Item display	Displays the preferences set for how items are displayed in Interchange.
Order	Displays the preferences set for where the orders are routed once placed.
Order display	Displays the preferences for how order information is presented to the customer.
Payment	Displays the preferences for the payment information accepted and collected.
Shipping	Displays the preferences for the shipping information collected.
Static pages	Displays the preferences for the static pages used.
Tax	Displays the preferences for how tax is calculated.
Template	Displays the preferences for the template display.
Register	Allows you to register your Interchange site with Red Hat and take advantage of a membership with the Interchange community.

The Tables Page

The *Tables* page lists the database tables identified in Interchange. Figure 36, page 68, shows an example of the **Tables** page.

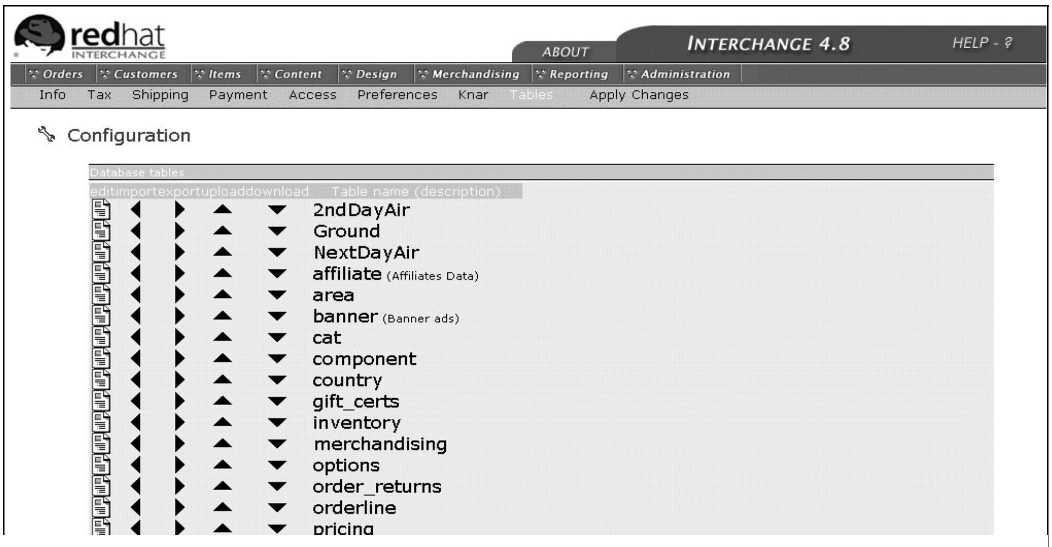


FIGURE 36: THE TABLE PAGE OF THE ADMINISTRATION SECTION

Table 34 describes the buttons and fields displayed on the **Table** page.

TABLE 34. The Table Page

FIELD/BUTTON	FUNCTION
(edit)	Click this button to access this table and make changes.
(import)	Click this button to import this table. The **Individual Table Import** page is displayed. FMI
(export)	Click this button to export this table. The **Individual Table Export** page is displayed. FMI

TABLE 34. The Table Page

FIELD/BUTTON	FUNCTION
(view)	Click this button to view the tab-delimited (or however you are importing the table) table. You cannot edit from this page.
(upload)	Click this button to upload the table information to your database.
(download)	Click this button to upload the table information to your database.

Index