eSellerate User's Guide

October 2012

eSellerate User's Guide

TOC

eSellerate Publishers Help

The content of this user's guide is also available as online help (eSellerate Publishers Help). You can access the help while you are logged in to the eSellerate Sales Manager.

eSellerate SDK Reference

Our SDK documentation (eSellerate SDK Reference) is available in two versions:

- Online help is available at http://help.esellerate.net/SDK/SDK_Home.htm.
- A PDF version of the help is available for downloading through the eSellerate Downloads page. To access that page, go to the Sales Manager home page and click the **eSellerate Downloads** link under the "What's New for eSellerate" information.

Other Resources

The following resources provide more information on eSellerate services:

Feature Information

- To learn more about eSellerate's feature set, please visit http://www.esellerate.net. The "Esellerate" section of this site includes descriptions of some of our most prominent offerings.

Documentation

- The content of this user's guide is also available as online help (eSellerate Publishers Help). You can access the help while you are logged in to the eSellerate Sales Manager.
- Our SDK documentation (eSellerate SDK Reference) is available in two versions:
  - Online help is available at http://help.esellerate.net/SDK/SDK_Home.htm.
  - A PDF version of the help is available for downloading through the eSellerate Downloads page. See "Downloads" below.

Support

- The eSellerate Support Center at http://support.esellerate.net – Here you'll find links to many helpful resources, including:
  - Knowledge base – You can browse or search this section of the Support Center for answers to your questions.
  - Discussion forum – You can use the forum to communicate with our technical support team and other publishers who use eSellerate.
- Technical support – Our technical support team offers fast, friendly assistance. This service is always free, even while you evaluate the system.
- End user support – Your customers who visit http://www.esellerate.net/support can click a link to get to their own help portal. We encourage you to direct your customers to this portal for purchase related support. The URL to use for this is http://shopper.esellerate.net.

Downloads

- The eSellerate Downloads page – You can access the downloads from the Sales Manager home page, by clicking the **eSellerate Downloads** link under the "What's New for eSellerate" information.

  Available downloads include:
  - The eSellerate Embedded Web Store SDK, for Macintosh or for Windows – You will need one of these SDKs to sell software directly from your application.
  - eSellerate SDK Reference – Our SDK documentation is included with the SDK downloads, and available for downloading separately at the eSellerate Downloads page.
  - eSellerate demo files – Check out our GeckoSoft demo to see eSellerate in action. The demo is included with the SDK downloads.

- Custom Layout documents and samples
- Resources for using the XML order notice
- Various business forms such as ACH credit authorization and non-U.S. wire transfer authorization

Note: The eSellerate (Integrated) SDK is a legacy option that was superseded by the Embedded Web Store SDK. It is not recommended for use with new projects. If you need access to the eSellerate SDK, please contact our support team to make that request.

Chapter 1 - Getting Started

eSellerate is the e-commerce company with comprehensive solutions designed especially for software publishers. With eSellerate, you can sell more software online—quickly, easily and without a large investment in complicated and costly hardware. From payment processing to software encryption and decryption, eSellerate is your turnkey e-commerce partner. eSellerate frees your time and resources so you can focus on what you do best: growing your core business.

A fully integrated sales solution – eSellerate puts the power of instant software purchase and fulfillment in the hands of your customer. Now, you can sell software directly to your customer from:

- Inside your application using Embedded Web Store eSellers and Integrated eSellers
- A full-featured online store using Web Store eSellers

With each eSeller, your most up-to-date sales information—including price and product information—is delivered in real time from our web-based Sales Manager.

The eSellerate system features complete web-based management tools. Using our online Sales Manager, you can change prices, edit product information, add or remove products and track sales in incredible detail—in real time, from anywhere.

This "Getting Started" section includes the following topics:

- "System Requirements" on next page
- "Components of eSellerate" on page 21
- "Setting Up and Using eSellerate" on page 22
- "Quick Start Guide" on page 23

System Requirements

The software and hardware required for you to administer eSellerate, and for your customers to purchase through eSellerate, will vary with usage. Specific requirements follow.

Managing eSellerate Publisher Accounts

To manage your publisher account, you need Internet access, and we recommend using one of the following browsers:

- Microsoft Internet Explorer 7.0 or later (Windows)
- Apple Safari 3.0 or later (Macintosh or Windows)
- Mozilla Firefox 3.0 or later (Macintosh or Windows)

In addition, because some functionality of our Sales Manager relies on pop-up windows, we recommend that you always allow pop-ups from our site.

Integrating Applications with eSellerate

To sell software directly from your application, you need a development environment such as Xcode for Mac OS or Visual C++ for Windows. You also need the appropriate SDK. The eSellerate Embedded Web Store SDK is available for Macintosh and Windows.

Note: The eSellerate (Integrated) SDK is a legacy option that was superseded by the Embedded Web Store SDK. It is not recommended for use with new projects. The Embedded Web Store SDK provides many advanced features that are not available with the legacy option, including fully customizable stores and universal binary support for Macs.

The Embedded Web Store SDKs are available for downloading through the eSellerate Downloads page. The link for accessing the downloads is on the Sales Manager home page, under the "What's New for eSellerate" information.

Purchasing Through eSellerate

The system requirements for purchasing through eSellerate will vary according to the eSellers that you use to sell your products. Information on the system requirements for all types of eSellers follows.

- **Web Store eSellers** – These eSellers require a computer with a standard web browser.
- **Integrated eSellers, Macintosh** – These eSellers require Mac OS 9.1 or later with CarbonLib 1.5 or later, or Mac OS X v10.2 or later. (These are not universal binaries.)
- **Integrated eSellers, Windows** – These eSellers require Windows 95 or later, or Windows NT 4.0 or later.
- **Embedded Web Store eSellers, Macintosh** – If you integrate your application with our standard SDK, these eSellers require Mac OS X v10.4 or later. If you integrate your application with our garbage collecting SDK, these eSellers require Mac OS X v10.5 or later.

  The REALbasic plug-in requires Mac OS X v10.3.9 or later.

  These eSellers are universal binaries that run natively on both PowerPC- and Intel-based Macintosh computers.
- **Embedded Web Store eSellers, Windows** – These eSellers require Windows XP or later, or Windows 2000 or later, and Internet Explorer 5.5 or later.

Components of eSellerate

These are the basic components of eSellerate:

- **Stock Keeping Units (SKUs)** – SKUs are the eSellerate representations of what you sell to your customers.
- **eSellers** – eSellerate gives you the power to sell your product directly to the end user from within your application or from your own online store. The different methods are called eSellers. You choose the combination of eSellers that's best for you.

Functionally, the eSellerate system can be divided into three categories:

- Publisher tools, which may include the Sales Manager and the eSellerate SDKs
- The Data Center, which enables eSellerate to provide a number of functions, including storage of publisher account and product information, serial number generation and payment processing
- End user software, which may include web browsers to access online stores, the eSellerate library, and the applications that use eSellerate

Setting Up and Using eSellerate

The following information explains how to set up a publisher account and begin using eSellerate.

Creating a Publisher Account

There are only a few steps required to create a publisher account, which will allow you to try out the system for free.

To create a publisher account:

1. Go to http://www.esellerate.net.
2. Click **Sign Up**. The License Agreement page appears.
3. Read through the evaluation license agreement and then click **I Agree**. The New Account Information page appears.
4. Enter login and company contact information. The fields and lists marked with an asterisk denote required information.
5. Click **Finished**. A confirmation page appears.
6. Click **Continue**. This will take you to the eSellerate Sales Manager home page. See also "Quick Start Guide" on the facing page.

Using Online Help

As you manage your publisher account in the eSellerate Sales Manager, the online help system is your main reference tool. It provides detailed information on how to use eSellerate.

To get online help:

Do one of the following:

- Click the **Help** link at the top of any Sales Manager page.
- Click the question button in a dialog box to get help on that subject.

Signing Up for eSellerate Service

When you're ready to start selling with the eSellerate system, please click the **I'm ready to sign up with eSellerate NOW!** link in the upper-right corner of the Sales Manager home page, and follow the instructions provided there.

Quick Start Guide

From highly customizable web stores to a full-featured affiliates program, eSellerate offers a wide range of options for selling your products. For the purposes of this quick start guide, we'll focus on what will likely be one of your first tasks as you're getting started with eSellerate—setting up a web store.

This guide begins with basic concepts and progressively adds details that you will need to know for more advanced applications. As you work through this guide you will:

- Set up a very basic web store and run through a preview (test) purchase. See "Setting Up a Basic Web Store" below.
- Go back into the web store settings and add functionality. See "Adding Functionality" on page 28.
- Learn about the many available options for increasing the sales of your products through eSellerate. See "Doing More with eSellerate" on page 35.

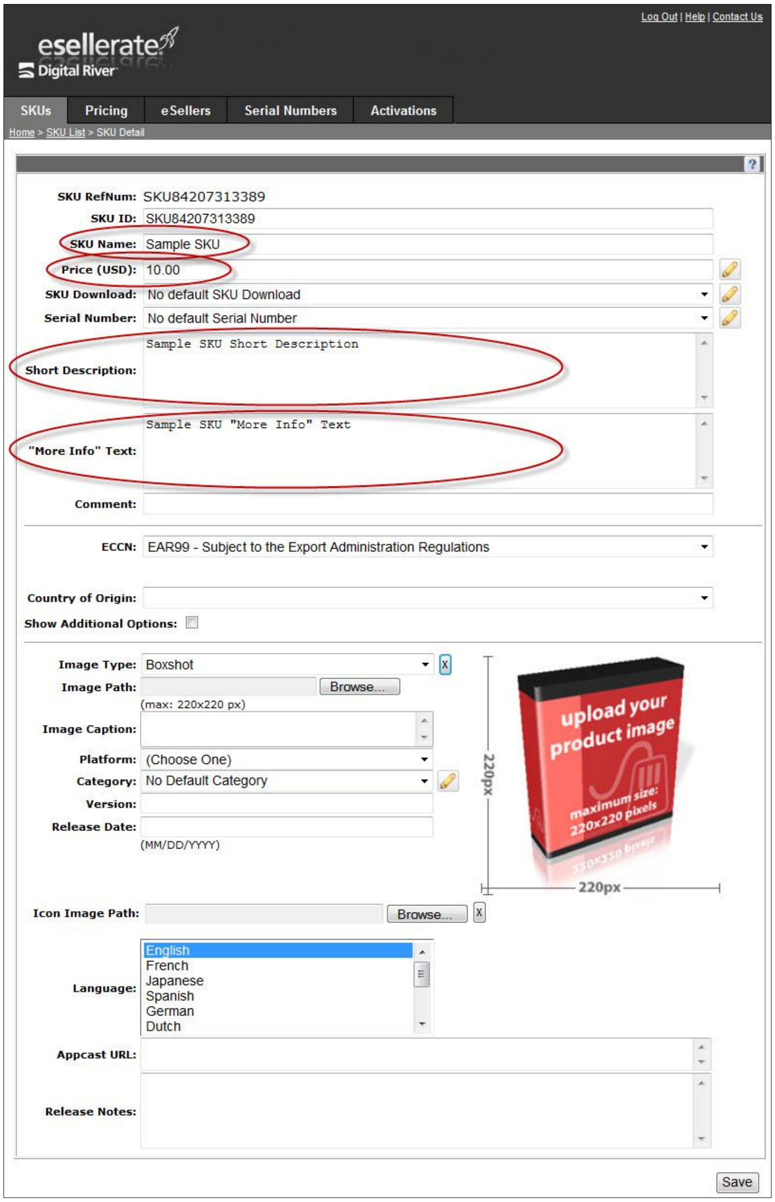
Setting Up a Basic Web Store

You can follow the steps presented here to quickly set up a web store and run through a preview purchase. As previously mentioned, we will use minimal settings for this first pass through the setup, and add functionality later.

Create a SKU

1. From the Sales Manager home page, go to the SKU Management section and click **SKUs**. The SKU List page appears.
2. Click **New**. The SKU Detail page appears.

3. Enter a SKU name, a price in U.S. dollars, a Short Description and "More Info" Text, as shown in the example below.

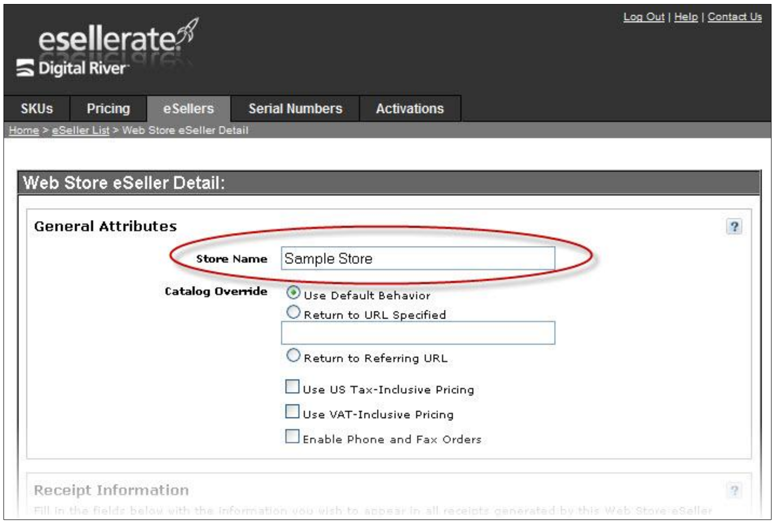


4. Click **Save.**

Create a Web Store eSeller

1. Go to the top portion of the page and click **eSellers**. The eSeller List page appears.
2. To the right of Create New, click **Web Store**. The Web Store eSeller Detail page appears.

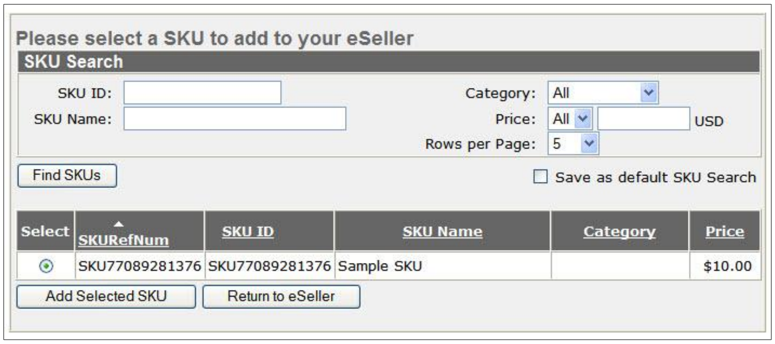
3. Enter a store name in the General Attributes section. You can leave everything else as is for now.



4. Click **Save Changes**. The Web Store eSeller Summary page appears.

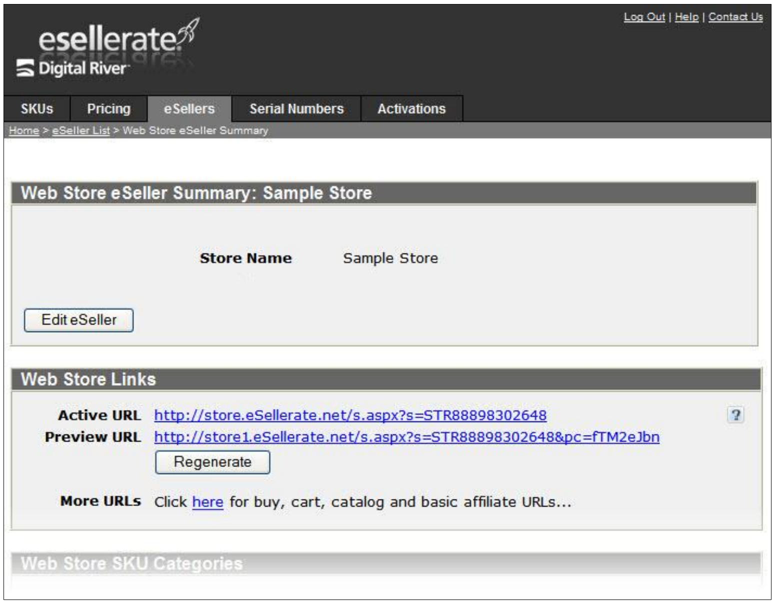
Add the SKU to the Web Store eSeller

1. In the Web Store SKU Categories section, click **Add SKU**. The following page appears.



2. Select the SKU that you added earlier, if it isn't already selected.
3. Click **Add Selected SKU**. The Web Store SKU Attributes page appears.
4. If you were setting up this SKU for actual use you would probably make a number of selections here. For now you should leave everything as is, and click **Save Changes**. The Select Online SKUs page appears again.

5. Click **Return to eSeller**. The following page appears.



Try out the preview store

In the Web Store Links section, click the Preview URL. A preview store opens in a new window.

The Short Description that you entered earlier appears with the SKU on the catalog page. Your "More Info" Text appears in a new frame when you click the **more info** link.

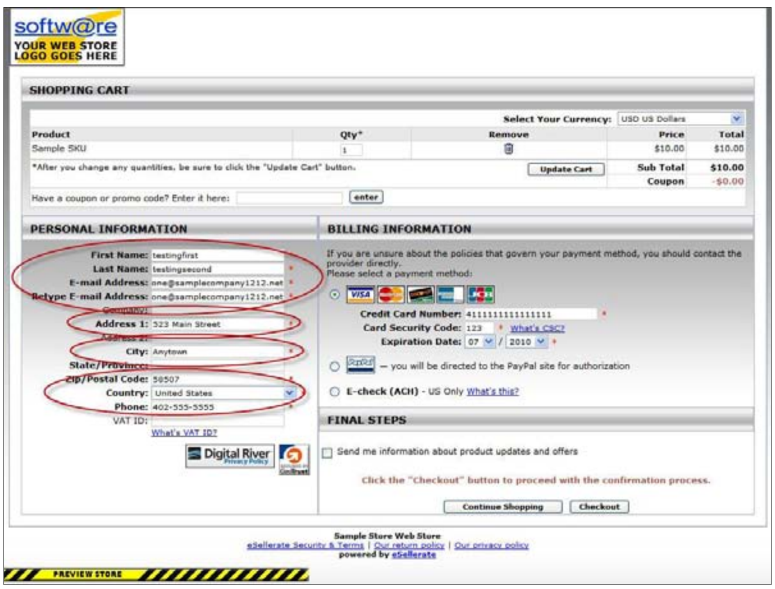
Although we used plain text for this example, you can use standard HTML to customize your Short Description and "More Info" Text. For SKUs that you display as cross-sell or up-sell offers, you can even display a basic web page in place of the "More Info" Text.

This example uses a Standard Layout that is set to the default color scheme. Standard Layouts allow you to select a pre-defined layout, assign a color scheme and upload your own banner logo. If you require more customization you should use Custom Layouts, which allow you nearly limitless control over the look, flow and content of your store layouts.

To proceed with this preview purchase, click **Buy**. A mini-shopping cart appears on the catalog page to display the newly added SKU, in addition to a couple of other visual reminders that a SKU is in the cart.

Click **View Cart**.

When the cart page appears, complete all the required entries in the Personal Information section. If you enter your own (valid) e-mail address here, you will later be able to see the Order Confirmation e-mail that eSellerate sends to customers.

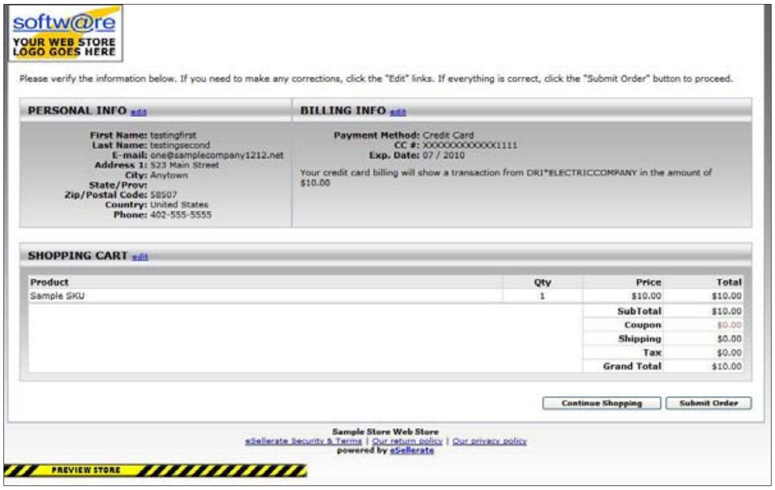


Note: The billing information for credit cards should already be filled in. If it's not, any values that you enter there will work for this preview purchase.

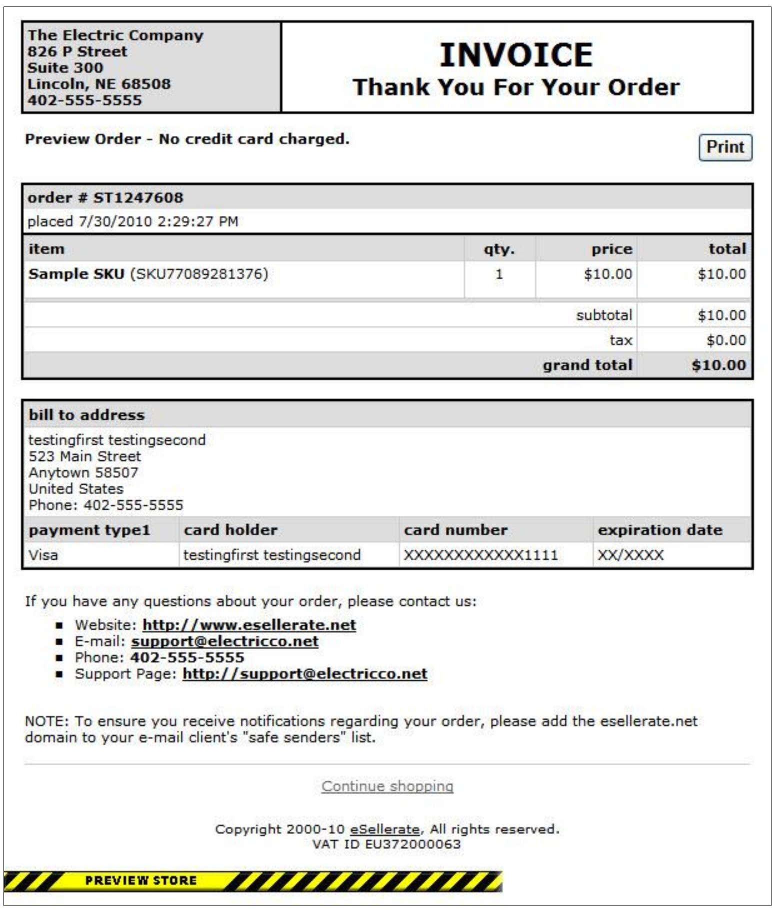
Note: No actual credit card charges occur for preview purchases.

Click **Checkout**.

When the confirmation page appears, click **Submit Order**.



A receipt/invoice appears at the end of the preview purchase.



Adding Functionality

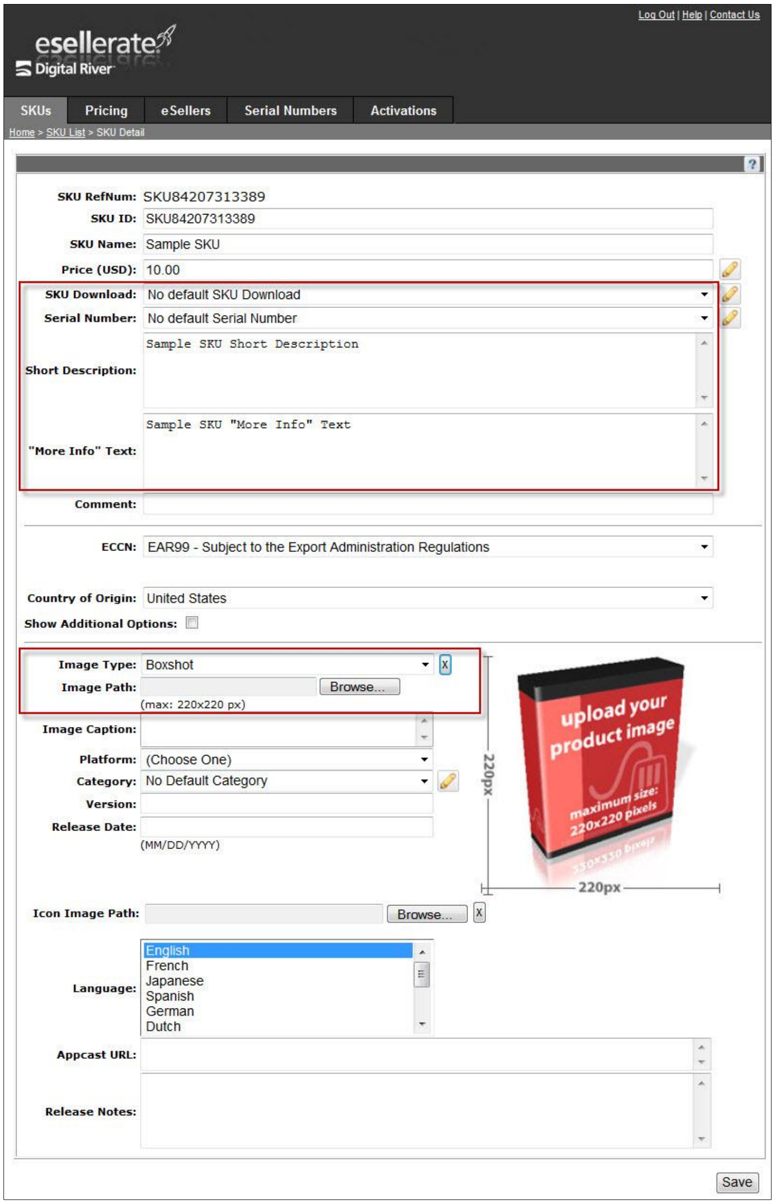
In the preceding exercise we skipped over most available options in order to quickly set up a web store and try it out with a preview purchase. As a result, the store was missing some basic elements like the SKU image and a banner logo, and when we ran through a preview purchase we didn't actually receive anything. We'll take care of those issues next as we add some basic functionality.

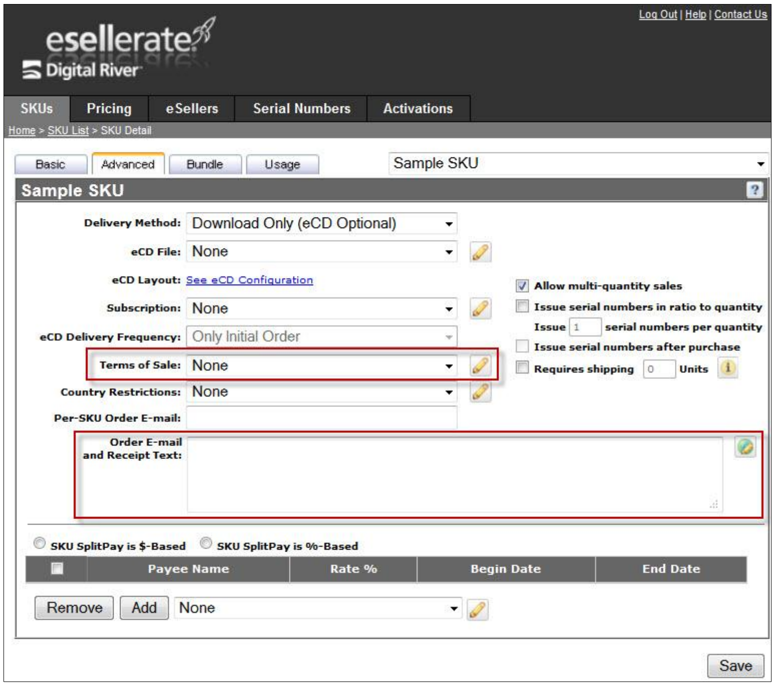
SKU Settings

For a typical setup, you will probably want to at least do the following:

- Assign a download file. This will be the default download file for the SKU, unless you override this setting when adding the SKU to an eSeller. eSellerate will deliver the assigned download file when customers purchase the SKU or download a trial version. **Prerequisites:** Create a download file. See "Creating Downloads" on page 128.
- Assign a serial number set. eSellerate will issue a serial number for use in registering the purchased SKU. **Prerequisites:** Create a serial number set. See "Creating Serial Numbers" on page 74. Also, your application will need to support serial number registration.
- Use HTML to add some formatting to the Short Description and "More Info" Text.
- Upload a boxshot image. The image will appear with the SKU when you list it in eSellers.
- Assign terms of sale. This setting specifies terms that the customer must agree to before purchasing the SKU. **Prerequisites:** Add a terms of sale item. See "Creating Terms of Sale" on page 158.
- Add Order E-mail and Receipt Text. This is a way to communicate information that customers will need to know about the SKU after the purchase, such as how to register the product or check for updates.

The options that you would need to set up are highlighted in the next two illustrations.





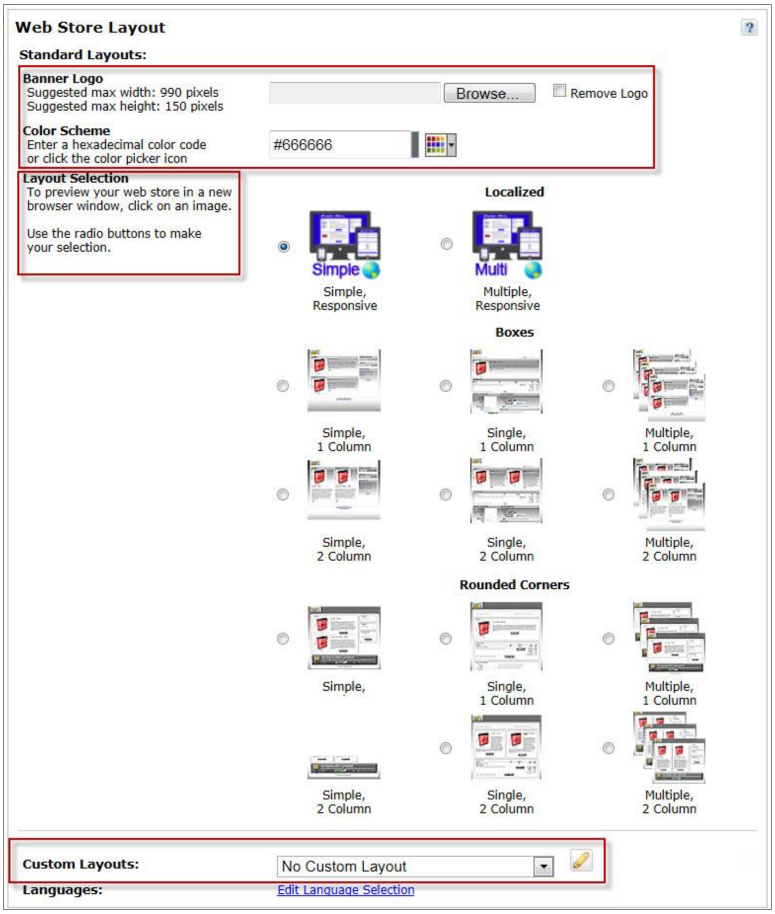
eSeller Settings

Next, we'll focus on the web store's layout. There are two main options for this:

- The Standard Layouts option, which offers 14 different layouts that support limited customization
- The Custom Layouts option, which offers several different default layouts that support major customization

The right type of layout for your web store depends on your customization needs. If one of the Standard Layouts works for you and you have no need to customize anything other than the color scheme and banner logo, you should use that option. If you require more customization you should use Custom Layouts.

The layout options for a Web Store eSeller are highlighted below. For each eSeller that you set up you will use either the top section (for Standard Layouts) or the bottom section (for Custom Layouts), but not both.



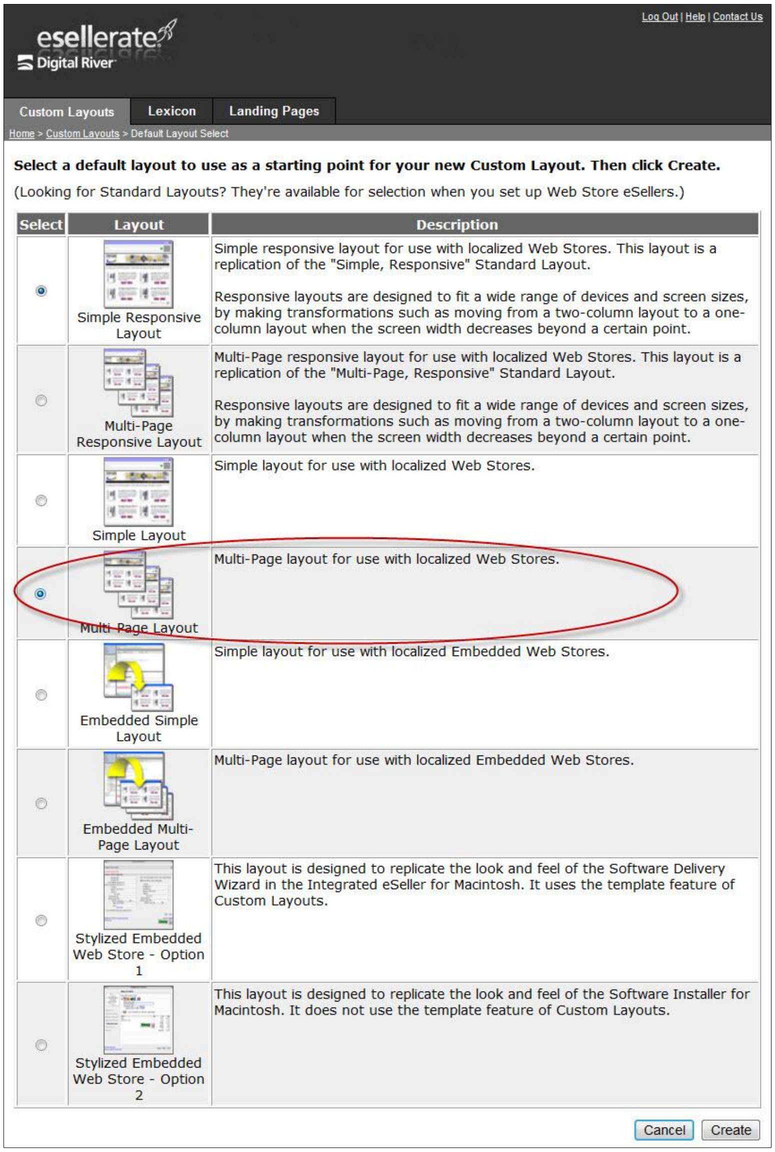
To select a Standard Layout, follow the instructions provided at "Creating a Web Store eSeller" on page 359.

If you choose to use a Custom Layout, you'll need to create one first, as explained below. Then return to the Web Store eSeller and make your selection.

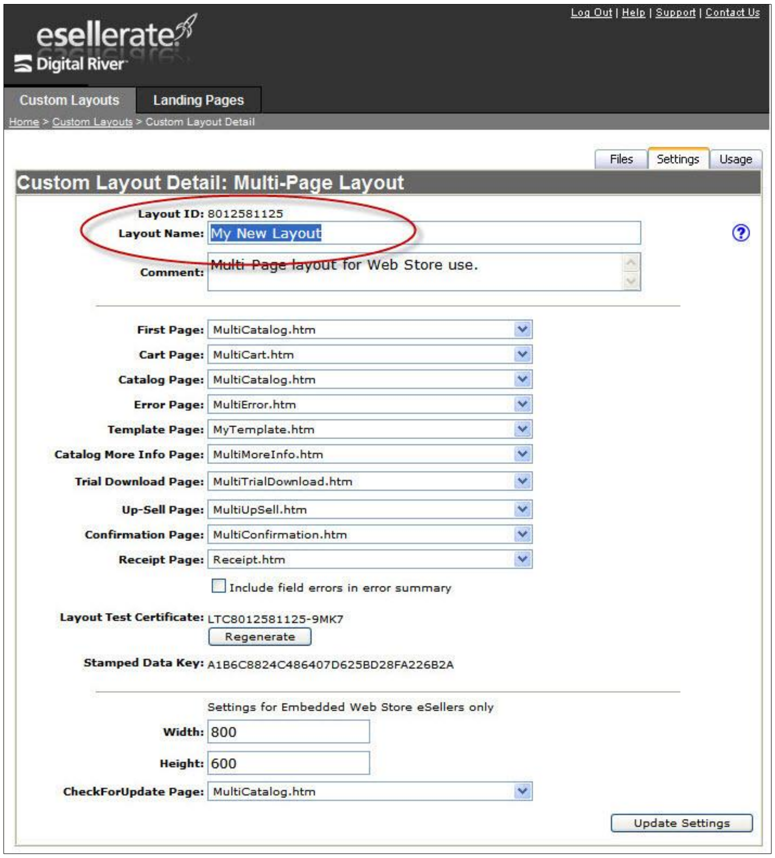
Creating a Custom Layout

The Custom Layouts editor provides a number of advanced customization options for when you need them, but for now you can get started just by selecting a layout and replacing the default banner logo with one of your own. The basic steps for doing this are as follows:

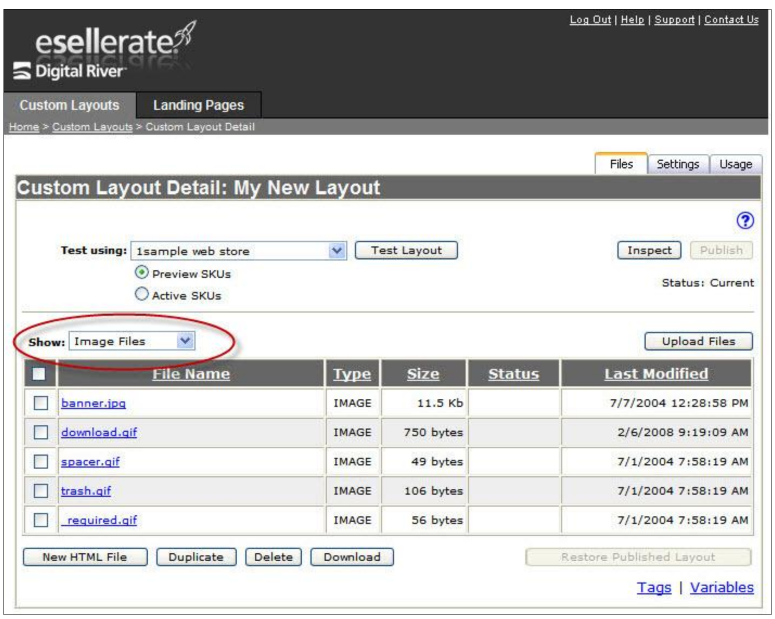
1. Select one of the default layouts to use as a starting point for your layout.



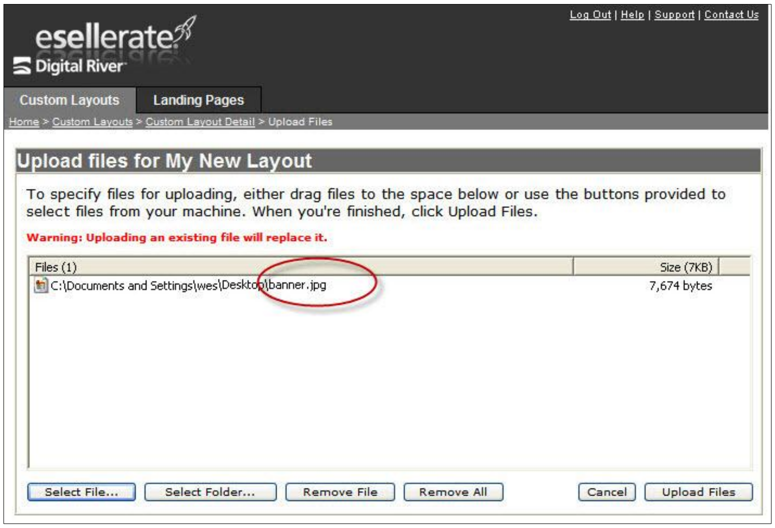
2. Name the layout and update your settings.



3. Set the **Files** tab to show image files.



4. Upload a new banner logo (named "banner.jpg") to replace the default one.



5. Inspect and publish the layout.

Detailed information on Custom Layouts is available at "Custom Layouts" on page 272.

Doing More with eSellerate

From here you can start implementing features to increase the sales of your products through eSellerate, and to protect the digital goods that you sell.

Some of the options that are available to you include:

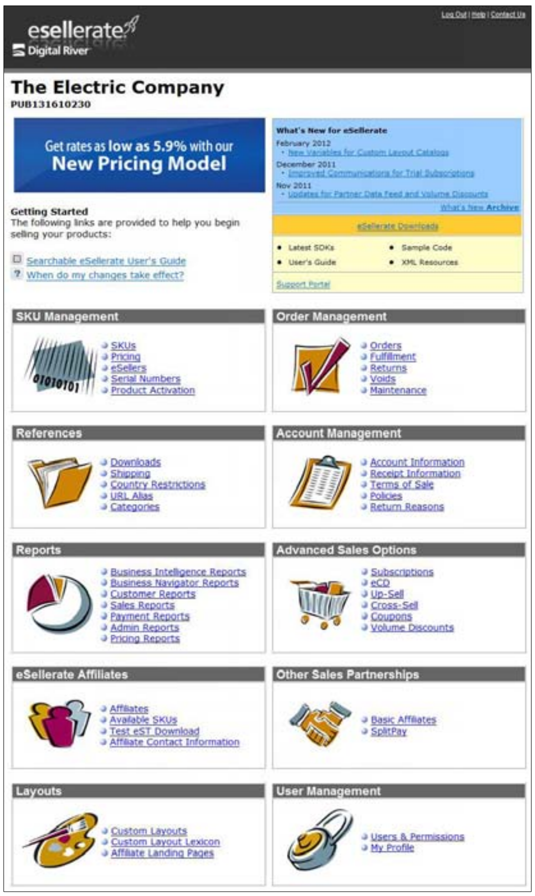
- **Cross-selling** – Promote one or more SKUs in addition to the ones your customers select for their purchases. See "Creating Cross-Sells" on page 238.
- **Up-selling** – Promote higher priced alternatives to the SKUs your customers select for their purchases. See "Creating Up-Sells" on page 233.
- **Bundles** – Sell a collection of SKUs as a bundle. See "Setting Up the SKU as a Bundle (Optional)" on page 53.
- **Coupons** – Use coupon discounts to drive customer traffic to your store and increase sales. See "Creating Coupon Discounts" on page 243.
- **eCD** – When customers purchase software from your web store, give them the option to also purchase backup copies on CD. Or sell CDs as items that are always included with certain SKUs. See "Configuring eCD" on page 219.
- **eDP** – You earn $1 each time your customers purchase eSellerate Download Protection (eDP). This service guarantees customers the ability to re-download exact copies of the files they purchased, for one year from the date of purchase. See "Presenting the eSellerate Download Protection (eDP) Option to Customers" on page 160.

- **Subscriptions** – Provide your customers with alternatives to paying a lump sum for products and services. See "Creating Subscription Methods" on page 207.
- **Embedded Web Store eSellers** – Add integrated purchase and update capabilities to your application, and control virtually every aspect of the store interface through the use of Custom Layouts. See "Embedded Web Store eSellers" on page 317.
- **eSellerate Product Activation** – Protect your software against casual software piracy. See "Creating Product Activation Sets" on page 93.
- **Localization** – Use localized stores to sell to your customers in their preferred languages. See "Localizing eSellerate Stores" on page 382.
- **eSellerate Affiliates** – Take advantage of our full-featured affiliates program and let others sell your products for you. See "eSellerate Affiliates" on page 249.

Chapter 2 - Using the eSellerate Sales Manager

With the eSellerate system, you get complete web-based tools to manage your account in real time, from anywhere. These tools are collectively known as the eSellerate Sales Manager.

To access the Sales Manager, go to http://www.esellerate.net and log in. The home page appears.



Sales Manager Functions

The Sales Manager home page provides access to the following functions:

SKU Management

- SKU Management – see "Creating SKUs" on page 42
- Pricing – see "Setting Up Pricing" on page 67
- eSellers – see "Creating eSellers" on page 73

- Serial Numbers – see "Creating Serial Numbers" on page 74
- Product Activation – see "Setting Up Product Activation" on page 93

Order Management

- Orders – see "Searching for Orders" on page 106
- Fulfillment – see "Fulfilling Orders" on page 112
- Returns – see "Returning Orders" on page 114
- Voids – see "Voiding Orders" on page 122
- Maintenance – see "Maintaining the XML Order Notice" on page 124

References

- Downloads – see "Creating Downloads" on page 128
- Shipping – see "Creating Shipping Tables" on page 130
- Country Restrictions – see "Creating Country Restrictions" on page 141
- URL Alias – see "Creating URL Aliases" on page 143
- Categories – see "Creating Categories" on page 145

Account Management

- Account Information – see "Entering Account Information" on page 148
- Receipt Information – see "Entering Default Receipt Information" on page 155
- Terms of Sale – see "Creating Terms of Sale" on page 158
- Policies – see "Entering Return and Privacy Policies" on page 159
- Return Reasons – see "Creating Return Reasons" on page 162

Reports

- Business Intelligence Reporting - see "Business Intelligence Reporting" on page 164
- Customer – see "Running Customer Reports" on page 165
- Sales – see "Running Sales Reports" on page 167
- Administrative – see "Running Admin Reports" on page 184
- Payment – see "Running Payment Reports" on page 182
- Pricing – see "Running Pricing Reports" on page 195

Advanced Sales Options

- Subscriptions – see "Setting Up Subscription-Based Licensing" on page 202
- eCD Fulfillment – see "Configuring eCD" on page 219
- Up-Sell – see "Creating Up-Sells" on page 233
- Cross-Sell – "Creating Cross-Sells" on page 238
- Coupons – see "Creating Coupons" on page 242
- Volume Discounts – see "Creating Volume Discounts" on page 246

eSellerate Affiliates

- Affiliates – see "eSellerate Affiliates" on page 249
- Available SKUs – see "Submitting SKUs" on page 252
- Test eST Download – see "Testing eST Downloads" on page 261
- Affiliate Contact Information – see "Entering Affiliate Contact Information" on page 251

Other Sales Partnerships

- Basic Affiliates – see "Setting Up Basic Affiliates" on page 266
- SplitPay – see "Joining eSellerate SplitPay" on page 268

Layouts

- Custom Layouts – see "Custom Layouts" on page 272
- Affiliate Landing Pages – see "Affiliate Landing Pages" on page 301

User Management

- Users & Permissions – see "Users & Permissions" on page 312
- My Profile – see "My Profile" on page 316

Note: You should never use more than one browser window to manage your account in the eSellerate Sales Manager. Any editing that you do in multiple windows can cause data to be lost.

Chapter 3 - SKU Management

The SKU Management section of the eSellerate Sales Manager is for completing the following tasks:

- "Creating SKUs" on next page
- "Setting Up Pricing" on page 67
- "Creating eSellers" on page 73
- "Creating Serial Numbers" on page 74
- "Setting Up Product Activation" on page 93
- "Importing External Serial Numbers for Activation" on page 98
- "Manually Activating Serial Numbers" on page 100

Note: If you're just getting started, you may find it helpful to create eSellerate items in the following order. First, create any needed auxiliary items, such as serial numbers, downloads, volume discounts and terms of sale (in any order). Then, create SKUs and eSellers, respectively. When you follow this order, you'll have serial numbers available for your SKUs, SKUs for your eSellers, and so on.

Creating SKUs

SKUs, or Stock Keeping Units, are the eSellerate representations of what you sell to your customers.

Overview

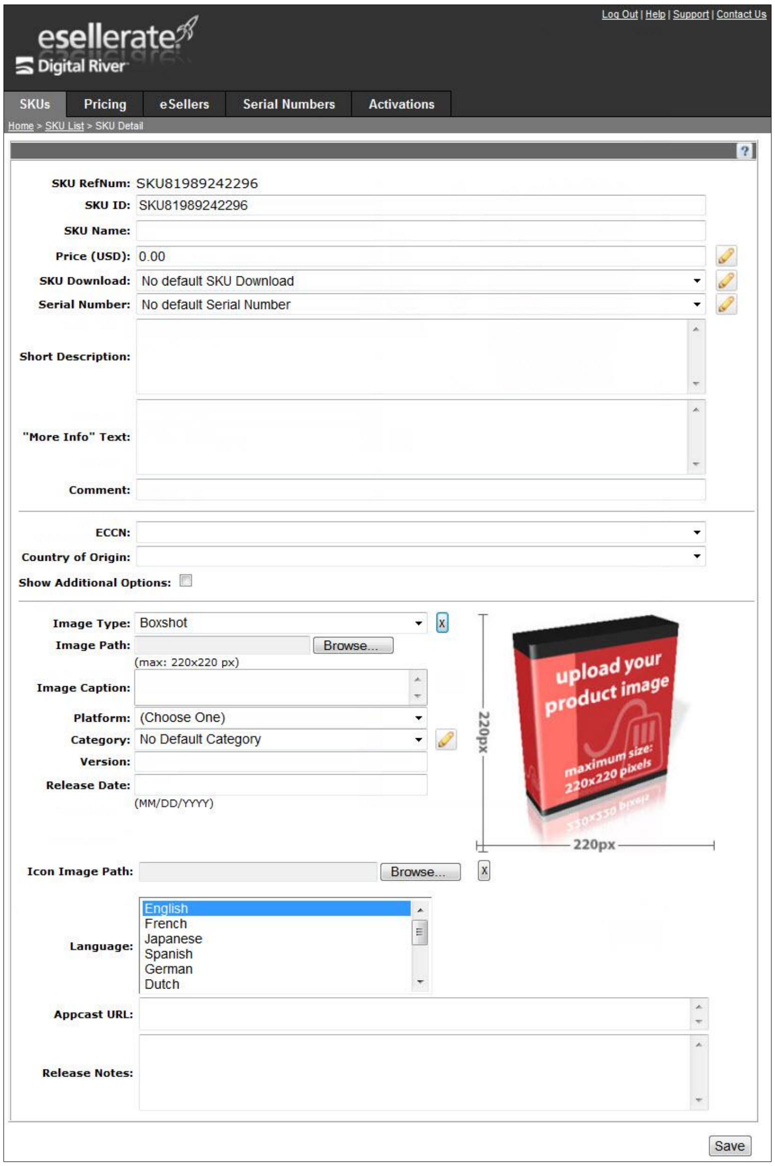
Creating SKUs involves the following steps:

- "Creating the SKU and Setting Its Basic Properties" on the facing page
- "Setting the SKU's Advanced Properties (Optional)" on page 49
- "Adding the SKU's Payees (Optional)" on page 52
- "Setting Up the SKU as a Bundle (Optional)" on page 53
- "Setting the SKU's Renewal Properties (Optional)" on page 58
- "Adding the SKU to Web Store or Embedded Web Store eSellers" on page 59

Creating the SKU and Setting Its Basic Properties

To create a SKU and set its Basic properties:

1. Click the **SKUs** tab. The SKU List page appears.
2. Click **New**. The SKU Detail page appears.



3. Fill out the SKU Details page as described here.

   In the following table, a check mark for "eSellers" indicates that the item is presented to customers when they purchase through one of your eSellers. A check mark for "Partner Data Feed" indicates that the item is included in our partner data feed that goes to the Digital River Try and Buy Network. To learn more about the data feed, please see http://www.esellerate.net/try_buy_network.asp.

   The following items are required entries: SKU ID, SKU Name, ECCN and Country of Origin. All other items on the page are optional.

Label	Description	eSellers	Partner Data Feed
SKU ID	SKU ID will be visible to your customers on the receipt page, and in the Order Confirmation e-mail. The ID appears immediately after the SKU name, enclosed by either parentheses or brackets. For example, a SKU named "Widget" with a SKU ID of "MyID" would display as: **Widget** (MyID) If desired, enter a **SKU ID** of up to 50 characters. Otherwise, you can accept the default, which is the same value as the **SKU RefNum** (a non-editable code used for internal tracking).	X	X
SKU Name	Enter a descriptive **SKU Name**. The name will appear with the SKU when you list it in eSellers.	X	X
Price (USD)	In the **Price (USD)** field, enter the price (in U.S. dollars) that you want to present for this SKU when you list it in eSellers. The price must be either $0.00 or $4.95 or above. **Note:** To set Native Currency Pricing (NCP) for this SKU, click **Save**, and then click the **Edit Pricing** icon.	X	X
SKU Download	If you choose, the eSellerate system can download a specified file when it delivers this SKU. You set the default download file here. (You can also override this setting with an individual eSeller.) To select a download file, use the **SKU Download** list. If you need to edit or create a download file before you make your selection, click **Save**, and then click the **Edit Downloads** icon. **Note:** To delete a download file, use the Downloads editor (available in the References section of the eSellerate Sales Manager).	X	X
Serial Number	If you select a serial number set here, eSellerate will issue serial numbers for this SKU when it is purchased. You can then use the serial numbers any way you choose. Typical uses include registering products and protecting products against software piracy. To select a serial number set, use the **Serial Number** list. If you need to edit or create a serial number set before you make your selection, click **Save**, and then click the **Edit Serial Numbers** icon.	X	X

Label	Description	eSellers	Partner Data Feed
Short Description and "More Info" Text	Complete the **Short Description** and **"More Info" Text** fields to provide prospective customers information about the SKU. This information will appear with the SKU when you list it in eSellers. (The exception is the primary SKU in an Integrated eSeller, which the user will have already selected.) The maximum number of characters is 500 for Short Description and 4,000 for "More Info" Text. (When used in the partner data feed, the strings are truncated if necessary, to the maximum of 128 characters for Short Description and 884 for "More Info" Text.) For SKUs you offer through Web Store and Embedded Web Store eSellers, the Short Description and "More Info" Text fields will accept any of the valid HTML tags listed at http://www.webmonkey.com/2010/02/html_cheatsheet/. In addition, the HTML representations listed under "Name Code" and "Number Code" at http://www.webmonkey.com/2010/02/special_characters/ are valid anywhere the eSellerate system supports HTML. **Note:** When you enter special characters in the Short Description and "More Info" Text fields, be sure to use valid HTML tags. You will encounter display problems if you enter special characters by methods other than valid HTML tags. For example, you should not enter special characters by copying and pasting symbols from Microsoft Word's symbol set, or by using keystrokes such as Option+2 for a trademark, or Option+8 for a bullet (Macintosh). **Note:** Although Integrated eSellers do not support the use of HTML tags in the Short Description and "More Info" Text fields, there is a related option that allows any eSeller to display a basic web page in place of the "More Info" Text (with some restrictions). This option is available only when the SKU is displayed as a cross-sell item. For more information, see "Cross-Sell SKU Options" on page 240.	X	X
Comment	The comment is for internal identification purposes only, and will not be visible to your customers. If desired, enter a **Comment** that applies to this SKU.		

Label	Description	eSellers	Partner Data Feed
ECCN and Country of Origin	ECCN and Country of Origin are required entries. Their purpose is as follows. eSellerate adheres to U.S. export controls and requires certain export control information for all SKUs. More information about export controls is available on these U.S. government web pages: Export Control Basics and Policies and Regulations. For information about your obligations to eSellerate in connection with export, please see this page. Use the **ECCN** list to select the ECCN that describes this SKU. Use the **Country of Origin** list to select the country where the SKU was manufactured or produced. If the ECCN you selected for this SKU requires you to provide additional details, click **Show Additional Options**. Then complete any of the following items that apply: • **License Exception** – See License Exception Code. • **CCATS** – See CCATS Code. • **Harmonize Code** – See Schedule B/HTS Code.		
Image Type	You can upload the following image types for this SKU: Boxshot, Screenshot 1, Screenshot 2, Screenshot 3 and Screenshot 4. Boxshot is the image that will appear with the SKU when you list it in eSellers. (The exception is the primary SKU in an Integrated eSeller, which the customer will have already selected.) The four different Screenshots are for use in the partner data feed only. To specify the image that you want to upload, make your selection from the **Image Type** list. (Then follow the instructions under "Image Path" to upload the image.)	X	X

Label	Description	eSellers	Partner Data Feed
Image Path	This is where you upload an image after selecting the image type, such as Boxshot or Screenshot 1. Click **Browse** (or **Choose File** if you're using Chrome or Safari) and then select the desired image. Next, click **Save**, which will start the upload. **Note:** Boxshots and Screenshots that you upload to the Sales Manager must be in PNG, JPG, GIF or BMP formats. For best results, we recommend using 8-bit graphics with a resolution of 72 pixels per inch. The maximum dimensions for Boxshots are 220 x 220 pixels. The minimum and maximum dimensions for Screenshots are 640 x 480 pixels and 2048 x 2048 pixels, respectively. You should not save these files in MacBinary format, even if you're uploading them from a Macintosh.		X
Image Caption	This option is available only when Image Type = Screenshot <x>. In the **Image Caption** field, enter the caption that you would like to show for the selected image. The maximum number of characters is 128.		X
Platform	Platform is a value that you can use to identify this SKU in searches. The platform will not be visible to your customers. To select a platform, use the **Platform** list.		
Operating System	This option is available only when Platform = Windows, Windows CE or Macintosh. Select the check box for each operating system that you want to list for this SKU.		X
Category	Category is a value that you can use to identify this SKU in searches. The category will not be visible to your customers. To select a category, use the **Category** list. If you need to edit or create a category before you make your selection, click **Save**, and then click the **Edit Categories** icon.		

Label	Description	eSellers	Partner Data Feed
Version	We recommend that you always complete the **Version** field for SKUs that you are including in the partner data feed.		X
Release Date	If you want to show a release date for this SKU, enter it in the **Release Date** field. Use the format MM/DD/YYYY.		X
Icon Image Path	Click **Browse** (or **Choose File** if you're using Chrome or Safari) and then select the icon that you want to upload for your program. For example, you could upload an Apple Icon Image (.icns) file here. The upload will begin when you save your changes.		X
Language	If you want to show that your product is localized for certain languages, you can select the languages from the **Languages** list. To select consecutive languages, hold down the **Shift** key and click on the desired items. To select non-consecutive languages, hold down the **Control** key (Windows) or the **Command** key (Macintosh) and click on the desired items.		X
Appcast URL	If there is an appcast that will deliver updates and release notes for this SKU, you can include it in the partner data feed. Enter the URL in the **Appcast URL** field. The maximum number of characters is 256. **Note:** Appcasts rely on RSS feeds, so they are not limited to specific platforms. You can create your own appcasts by using the "enclosure" feature of RSS 2.0, or you can use third-party developer tools for that purpose. An example of an appcasting option for Macintosh is the Sparkle framework.		X
Bundle ID	This option is available only when Platform = Macintosh. Enter the **Bundle ID** exactly as it appears in the Info.plist file of your application. Bundle ID is case-sensitive, and the maximum number of characters is 200.		X
Bundle Type	This option is available only when Platform = Macintosh. Use the **Bundle Type** list to select the type for your application bundle. Your choices are Application, Preference Pane, Screen Saver and Widget.		X
Release Notes	To provide release information for this SKU, enter the desired text (up to 1,024 characters) in the **Release Notes** field. This field will accept any of the valid HTML tags listed at http://www.webmonkey.com/2010/02/html_cheatsheet/.		X

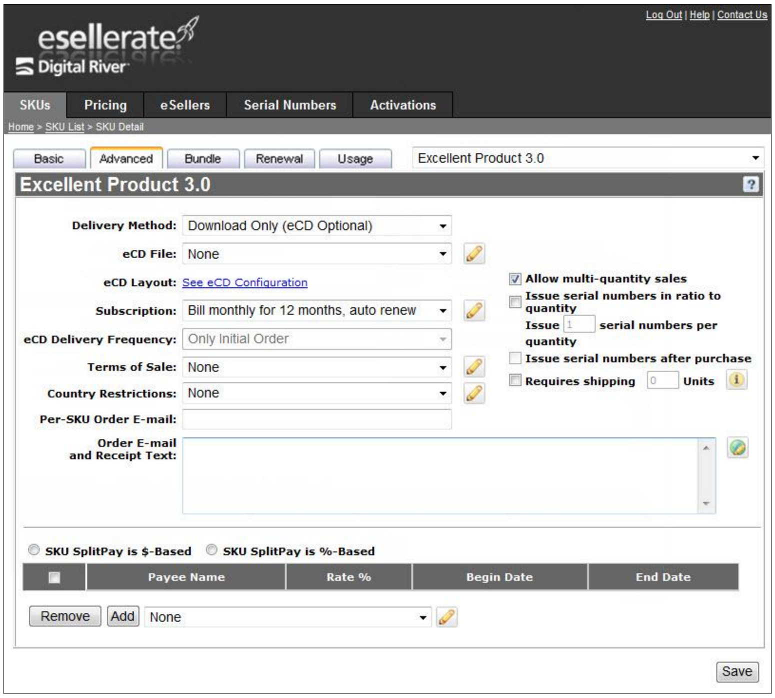
SKU Basic Tab Options

4. Click **Save**. Notice that four tabs now display: Basic, Advanced, Bundle and Usage. The section that you just completed was the Basic tab.

Setting the SKU's Advanced Properties (Optional)

To set the SKU's Advanced properties:

1. From the SKU Detail page, click the **Advanced** tab. The SKU's Advanced properties appear.



2. The **Delivery Method** list determines whether eCD (CD fulfillment) is optional, or included with the SKU.

   If you select **Download Only (eCD Optional)**, your customers will have the option of receiving copies of their software purchases on a CD (provided that you also select an eCD file), in addition to downloading them from your web store. The remaining delivery methods always include eCD with the SKU, and vary according to whether you want to provide a download (**Download and eCD**) or no download (**eCD Only**).

   > **Caution:** Please carefully review your production costs for the **Download and eCD** and **eCD Only** delivery methods. See "eCD Included" on the eCD Configuration tab.

3. The **eCD File** list determines the file that is written to CD to represent the SKU when customers purchase eCD.

   If **Delivery Method** is set to **Download Only (eCD Optional)**, you can select **None** here when appropriate. Otherwise, you will need to select an eCD file. If you need to edit or create an eCD file (download) before you make your selection, click **Save**, and then click the **Edit Downloads** icon.

4. You can use eCD Layouts to control certain attributes of CDs that are delivered to your customers. Some examples are the Mailer Type (Standard Mailer, Custom Mailer or DVD Case) and the CD Face Image.

To select a layout, use the **eCD Layout** list. You can select the default layout, or one that you uploaded. If you need to edit or create a layout before you make your selection, click **Save**, and then click the **Edit eCD Layouts** icon.

> **Note**: If **Delivery Method** is set to **Download Only (eCD Optional)**, you will not be able to select an eCD Layout on the Advanced tab. All SKUs with that delivery method will use the same eCD Layout—the one set under "eCD Optional" on the eCD Configuration tab.

> **Note:** The default layout includes a Standard Mailer, a default image for the CD face, a basic Install Menu, and no trial files.

5. The subscriptions option applies to SKUs that you want to sell through a subscription model.

   To select a subscription method, use the **Subscriptions** list. If you need to edit or create a subscription method before you make your selection, click **Save**, and then click the **Edit Subscriptions** icon.

   > **Note:** If you select a subscription method here, you also have the option of specifying which SKUs are available at subscription renewal. See "Setting the SKU's Renewal Properties (Optional)" on page 58.

6. When you sell this SKU through a subscription model and **Delivery Method** is set to **Download and eCD** or **eCD Only**, you can determine the eCD delivery frequency. There will always be a CD delivered with the initial order (the basis for all the frequency options), but you can also choose to have it delivered at additional times in the subscription period, including renewals and recurring billings.

   Use the **eCD Delivery Frequency** list to make your selection.

   > **Caution:** You will have additional eCD costs with subscriptions if **eCD Delivery Frequency** is set to anything other than **Only Initial Order**.

7. You can use the terms of sale option to specify terms that the customer must agree to before purchasing this SKU.

   To select a terms of sale item, use the **Terms of Sale** list. If you need to edit or create a terms of sale item before you make your selection, click **Save**, and then click the **Edit Terms of Sale** icon.

8. You can use the country restrictions option to restrict customers in certain countries from purchasing this SKU.

   To select a country restriction set, use the **Country Restrictions** list. If you need to edit or create a country restriction set before you make your selection, click **Save**, and then click the **Edit Restrictions** icon.

9. To supplement our per-transaction order notification (available through Account Information), you can also receive e-mail notification per SKU sold.

   To enable notification for this SKU, enter one or more recipient e-mail addresses in the **Per-SKU Order E-mail** field. Use commas to separate multiple e-mail addresses. If you choose to not use this feature, leave the field blank.

10. If you select the **Allow multi-quantity sales** check box, your customers will be able to purchase multiple quantities of this SKU. Clearing the check box will restrict the purchase quantity to one per transaction.

> **Note:** If you set up this SKU to not allow multi-quantity sales, it is still possible to sell multiple quantities of this SKU as a cross-sell item. The setting for controlling multi-quantity cross-sell sales is available at the Cross-Sell SKU Detail level.

> **Note:** Some types of serial number sets can indicate the SKU quantity purchased. When that option is available for a serial number set, you enable it by selecting the **Use Quantity** check box.

11. When you allow multi-quantity sales, selecting the **Issue serial numbers in ratio to quantity** check box instructs eSellerate to issue serial numbers in ratio to the SKU quantity purchased (assuming that you have assigned a serial number set to the SKU). If you clear this check box, your customer will receive one serial number that applies to all SKU quantities purchased.

> **Note:** This option requires unique serial numbers. Be sure to keep this restriction in mind when you choose serial number sets for use with this SKU.

> **Note:** When a bundle/parent SKU has **Issue serial numbers in ratio to quantity** selected (and the purchase quantity is greater than 1 or **Issue <x> serial numbers per quantity** is greater than 1) you cannot activate a serial number for the SKU with a Purchase or CheckForUpdate call. An alternative is to get a serial number from the result data that is returned from the call, and activate it by calling ActivateSerialNumber.

> **Note:** There are some limitations to using the multiple serial numbers feature with Integrated eSellers. When multiple serial numbers are issued per quantity (see the explanation below), receipts for Integrated eSellers will not include the serial numbers. However, the order confirmation e-mails sent to customers will still include the serial numbers.
>
> Issuing multiple serial numbers per quantity occurs when **Issue serial numbers in ratio to quantity** is selected and either the purchase quantity is greater than 1, or **Issue <x> serial numbers per quantity** is greater than 1.

12. When you issue serial numbers in ratio to the SKU quantity purchased, the number that you enter for **Issue <x> serial numbers per quantity** determines the ratio used. (This can allow you to sell SKUs as multipacks.) For example, if you enter 10 for this option and the SKU quantity purchased is 2, eSellerate will issue 20 serial numbers.
13. When you issue serial numbers in ratio to the SKU quantity purchased, selecting the **Issue serial numbers after purchase** check box instructs eSellerate to defer issuing the serial numbers until after the purchase. In that case, order receipts and confirmation e-mails will tell your customers to visit eSellerate After-Purchase Services (http://store.esellerate.net/support) to get their serial numbers. The site allows customers to get as many serial numbers as needed at each visit, until they have used up all the available serial numbers.

    To be able to work with the "Issue serial numbers after purchase" option, serial number sets must meet the following criteria:

    - They must be non-External. (See "External" on page 84.)
    - They must have a Based On value, such as the customer's first and last name.
    - If they are Armadillo serial number sets, they cannot have both a Based On value and a Prompted value.
    - If they are Standard Enhanced serial number sets, their Delivery Method must be set to Serial Number.

    If a serial number set does not meet the above criteria, eSellerate will issue all associated serial numbers at the time of purchase.

Note: For a SKU quantity of 1, eSellerate will issue the associated serial number at the time of purchase, regardless of whether or not **Issue serial numbers after purchase** is selected.

Note: The "Issue serial numbers after purchase" option is not compatible with Integrated eSellers.

14. When applicable, select the **Requires shipping <x> Units** check box and enter the number of shipping units that this SKU requires.

    Note: The "Requires shipping" setting is not used with the eCD fulfillment option.

15. In the **Order E-mail and Receipt Text** field, you can enter text to accompany this SKU's information in the following customer communications: Order Confirmation e-mail (sent to your customer immediately after the purchase), Order Fulfillment e-mail (sent to your customer when you fulfill the order) and the receipt displayed at the conclusion of a Web Store or Embedded Web Store purchase. This enables you to provide your customers with information specific to each SKU in their order.

    For SKUs you offer through Web Store and Embedded Web Store eSellers, the Order E-mail and Receipt Text field will accept any of the valid HTML tags listed at http://www-.webmonkey.com/2010/02/html_cheatsheet/.

    In addition, the HTML representations listed under "Name Code" and "Number Code" at http://www-.webmonkey.com/2010/02/special_characters/ are valid anywhere the eSellerate system supports HTML.

    For related e-mail customization features, see "Entering Default Receipt Information" on page 155.

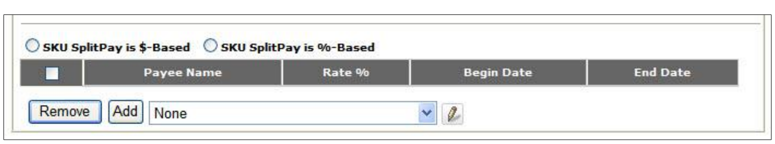
16. When applicable, set up the SKU SplitPay section, as described at "Adding the SKU's Payees (Optional)" below.
17. Click **Save**.

Adding the SKU's Payees (Optional)

The SKU SplitPay section of the Advanced tab is for setting up SKU relationships with payees in the eSellerate SplitPay program. (See "Joining eSellerate SplitPay" on page 268.) It allows you to specify the following payee properties:

- Which payee(s) should receive a portion of the sales proceeds from the selected SKU
- Whether the SKU split payment is based on a dollar amount or a percentage of the SKU price
- The rate each payee receives
- If date restrictions are required, a begin date and/or an end date

Note: Before setting up SKU relationships with payees, you must first add at least one payee to your payee list.



To set up split payments for this SKU:

1. Use the provided list to select a payee. If you need to edit or create a payee record before you make your selection, click **Save**, and then click the **Edit Payees** icon.

2. Click **Add**. The payee will receive e-mail confirmation that you have created the SKU relationship, and the payee will be added to the Payee Name listings for this SKU.
3. By default, the SKU split payment is based on a dollar amount. If you would like to base the payment on a percentage of the SKU price, select **SKU SplitPay is %-Based**.
4. Enter a rate in the **Rate** field, making sure to consider any additional payees that you might add for this SKU.
5. If desired, enter a date in the **Start Date** field. The start date represents the date when the split payments can begin. If you do not specify a start date, the split payments can begin immediately.
6. If desired, enter a date in the **End Date** field. The end date represents the date when the split payments will end. If you do not specify an end date, the split payments can continue until you choose to stop them (by removing payees from the SKU relationship).
7. Click **Save**. The payee will receive e-mail notification of the settings you chose for rate and calculation basis (dollar or percentage), and of any start and end dates that apply.
8. Repeat steps 1-7 to add as many payees as desired.

After setting up split payments for this SKU, you may make changes at any time. As with initial setup, your payees will receive e-mail notification of the changes.

Setting Up the SKU as a Bundle (Optional)

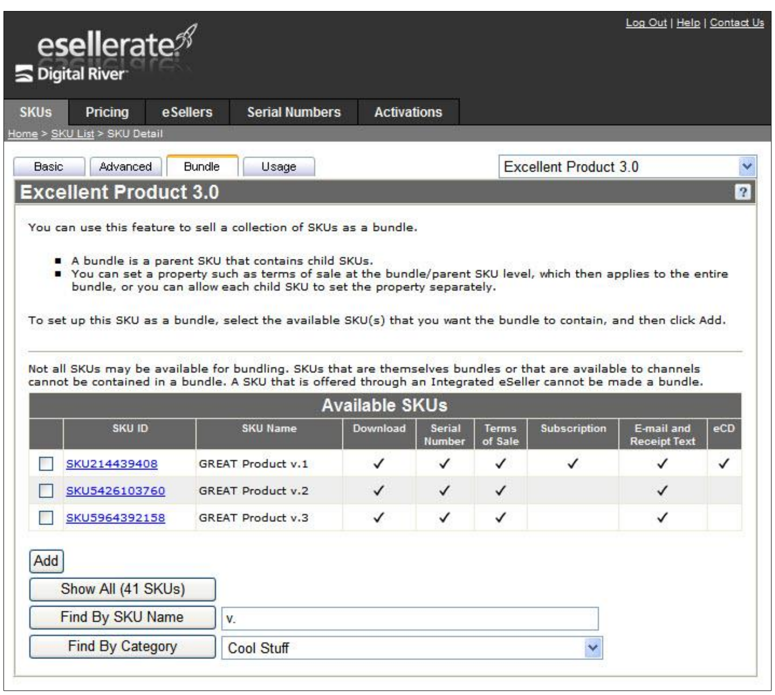
You can use this feature to sell a collection of SKUs as a bundle. Detailed information on bundles is available at "Bundle Overview" on page 61.

Notes

- A bundle is a parent SKU that contains child SKUs.
- You can set a property such as terms of sale at the bundle/parent SKU level, which then applies to the entire bundle, or you can allow each child SKU to set the property separately.

To set up this SKU as a bundle:

1. From the SKU Detail page, click the **Bundle** tab. The SKU's Bundle properties appear.



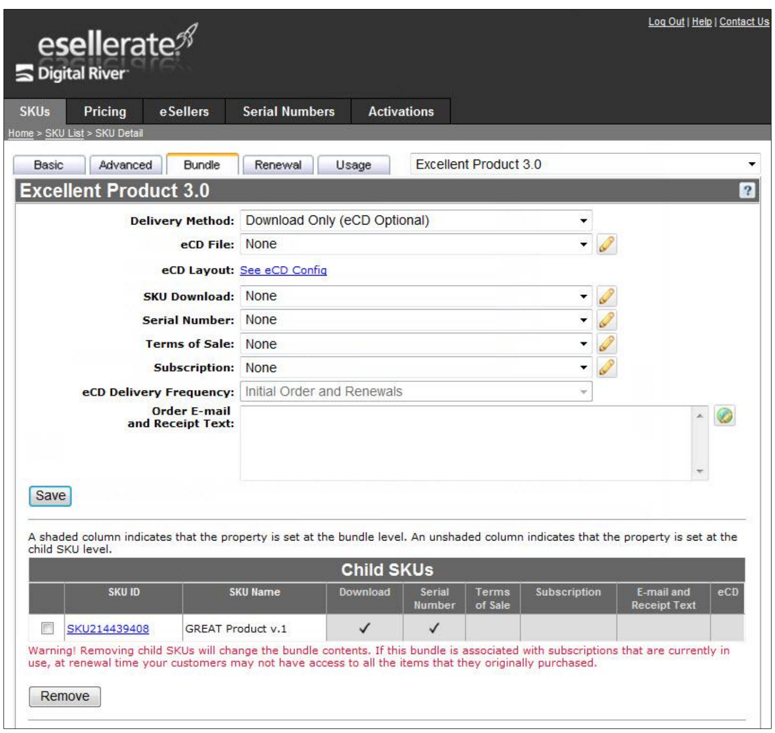
2. When the number of available SKUs exceeds a certain number, some SKUs will be hidden. If the SKUs that you want to add to the bundle are not showing, use any of the following methods to find them:
   - To see all the available SKUs, click **Show All (X SKUs)**.
   - You can search for a SKU by entering all or part of its name. The name search is case-insensitive.
   - If your account includes multiple SKU categories (and there are SKUs set up to use them), there will be an option to search by category. (You can create categories for SKUs and Web Store/Embedded Web Store eSellers at Home > Categories.)
3. Select the check box for each SKU that you want the bundle to contain.

   > **Note:** To control the order in which child SKUs appear in receipts and order confirmations, add the SKUs to the bundle one at a time in the required order. (You can see the current ordering in the Child SKUs list.) To make adjustments to an existing bundle, remove the SKUs that are out of order, and then add them back in one at a time in the required order.

4. Click **Add**.

Once you add at least one SKU to create the bundle, the information near the top of the page disappears, and selections for these properties appear: **Delivery Method**, **eCD File**, **eCD Layout**, **SKU Download**, **Serial Number**, **Terms of Sale**, **Subscription**, **eCD Delivery Frequency** and **Order E-mail and Receipt Text**.

If you want one of these properties to be the same for the entire bundle, you can set it at the bundle level. Otherwise, you can allow each child SKU to set the property separately.



5. You can use the **Delivery Method** list to determine whether eCD (CD fulfillment) is optional, or included with the specified SKUs. Your choices are as follows:

- **Download Only (eCD Optional)** – A single delivery method will apply to the entire bundle. When customers purchase the bundle, they will have the option of receiving copies of their software purchases on a CD (provided that you also select an eCD file), in addition to downloading them from your web store.
- **Specified in Each Child SKU** – Each child SKU will use the delivery method specified for it on the Advanced tab of the SKU Detail page. When customers purchase the bundle, eCD will be optional, included, or both, depending on the settings of the child SKUs. (Selecting this option also sets the bundle's **eCD File** and **eCD Layout** lists to **Specified in Each Child SKU**.)
- **Download and eCD** – A single delivery method will apply to the entire bundle. When customers purchase the bundle, they will receive one or more CDs, and downloads will be made available to them.
- **eCD Only** – A single delivery method will apply to the entire bundle. When customers purchase the bundle, they will receive one or more CDs. No downloads will be made available to them in regard to the bundle.

Caution: Please carefully review your production costs for the **Download and eCD** and **eCD Only** delivery methods. See "eCD Included" on the eCD Configuration tab.

6. The **eCD File** list determines the files that are written to CD to represent the specified SKUs when customers purchase eCD. Your choices are as follows:

   - **None** – Neither the bundle nor the child SKUs will use eCD files. This option is available only with the **Download Only (eCD Optional)** delivery method.
   - **Specified in Each Child SKU** – Each child SKU will use the eCD file specified for it on the Advanced tab of the SKU Detail page. When customers purchase the bundle, they will receive a separate file on CD for each child SKU that uses that option.
   - **<eCD File>** – A single eCD file will apply to the entire bundle. When customers purchase the bundle, they will receive one file on CD.

   If you need to edit or create an eCD file (download) before you make your selection, click **Save**, and then click the **Edit Downloads** icon.

7. You can use eCD Layouts to control certain attributes of CDs that are delivered to your customers. Some examples are the Mailer Type (Standard Mailer, Custom Mailer or DVD Case) and the CD Face Image.

   To select a layout, use the **eCD Layouts** list. Your choices are as follows:

   - **Default eCD Layout** – A single eCD layout will apply to the entire bundle. When customers purchase the bundle, all CDs that they receive for eCD will use the default layout.

     Note: This option includes a Standard Mailer, a default image for the CD face, a basic Install Menu, and no trial files.

   - **Specified in Each Child SKU** – Each child SKU will use the eCD layout specified for it on the Advanced tab of the SKU Detail page. When customers purchase the bundle, the CDs that they receive for eCD may use a variety of layouts, depending on the settings of the child SKUs.
   - **<eCD Layout>** – A single eCD layout will apply to the entire bundle. When customers purchase the bundle, all CDs that they receive for eCD will use the same layout.

   If you need to edit or create a layout before you make your selection, click **Save**, and then click the **Edit eCD Layouts** icon.

8. You can use the **SKU Download** list to specify the file that eSellerate should make available for

downloading when it delivers one of your SKUs. (You can also override SKU download settings with individual eSellers.) Your choices are as follows:

- **None** – Neither the bundle nor the child SKUs will use downloads.
- **Specified in Each Child SKU** – Each child SKU will use the download file specified for it on the Basic tab of the SKU Detail page. When customers purchase the bundle, they will download a separate file for each child SKU that uses that option.
- **<SKU Download>** – A single download file will apply to the entire bundle. When customers purchase the bundle, they will download one file.

If you need to edit or create a download file before you make your selection, click **Save**, and then click the **Edit Downloads** icon.

> **Note:** To delete a download file, use the Downloads editor (available in the References section of the eSellerate Sales Manager).

9. If you assign serial number sets to your SKUs, eSellerate will issue serial numbers for the SKUs when they are purchased. You can then implement the serial numbers any way you choose. Typical uses include registering products and protecting products against software piracy.

   To select a serial number set, use the **Serial Number** list. Your choices are as follows:

   - **None** – Neither the bundle nor the child SKUs will use serial numbers.
   - **Specified in Each Child SKU** – Each child SKU will use the serial number set specified for it on the Basic tab of the SKU Detail page. When customers purchase the bundle, eSellerate will issue a separate serial number for each child SKU that uses that option.
   - **<Serial Number Set>** – A single serial number set will apply to the entire bundle. When customers purchase the bundle, eSellerate will issue one serial number. (This example assumes a quantity of one.)

   If you need to edit or create a serial number set before you make your selection, click **Save**, and then click the **Edit Serial Numbers** icon.

10. You can use the **Terms of Sale** list to specify terms that the customer must agree to before purchasing one of your SKUs. Your choices are as follows:

    - **None** – Neither the bundle nor the child SKUs will use terms of sale.
    - **Specified in Each Child SKU** – Each child SKU will use the terms of sale specified for it on the Advanced tab of the SKU Detail page. When customers purchase the bundle, they will need to agree to one consolidated list that includes the terms of sale for each child SKU that uses that option.
    - **<Terms of Sale>** – A single set of terms will apply to the entire bundle. When customers purchase the bundle, they will need to agree to one set of terms.

    If you need to edit or create a terms of sale item before you make your selection, click **Save**, and then click the **Edit Terms of Sale** icon.

11. The subscription option applies to SKUs that you want to sell through a subscription model.

    To select a subscription method, use the **Subscriptions** list. Your choices are as follows:

    - **None** – Neither the bundle nor the child SKUs will use subscriptions.
    - **Specified in Each Child SKU** – Each child SKU will use the subscription specified for it on the Advanced tab of the SKU Detail page. When customers purchase the bundle, they will start a separate subscription for each child SKU that uses that option. The customers will need to agree to one consolidated list that includes the subscription terms and conditions for each subscription.

- **<Subscription>** – A single subscription will apply to the entire bundle. When customers purchase the bundle, they will start one subscription, which will be associated with the bundle's SKU name and SKU ID. The customers will need to agree to one set of subscription terms and conditions.

If you need to edit or create a subscription method before you make your selection, click **Save**, and then click the **Edit Subscriptions** icon.

12. When you sell this SKU through a subscription model (with eCD included), you can determine the delivery frequency for eCD. There will always be a CD delivered with the initial order (the default setting), but you can also choose to have it delivered at additional times in the subscription period, including renewals and recurring billings.

    Use the **eCD Delivery Frequency** list to make your selection.

    Caution: You will have additional eCD costs with subscriptions if **eCD Delivery Frequency** is set to anything other than **Only Initial Order**.

13. The **Order E-mail and Receipt Text** field is for entering text to accompany a SKU's information in the following customer communications: Order Confirmation e-mail (sent to your customer immediately after the purchase), Order Fulfillment e-mail (sent to your customer when you fulfill the order) and the receipt displayed at the conclusion of a Web Store or Embedded Web Store purchase. This enables you to provide your customers with information specific to each SKU in their order.

    Like the other properties noted here, you can specify Order E-mail and Receipt Text at the bundle level, or the child SKU level. The differences are as follows:

    - **Bundle level:** As you add SKUs to the bundle, their Order E-mail and Receipt Text is copied to the bundle's Order E-mail and Receipt Text field. You can edit the copied text and add information about the bundle if desired. (Text that is copied to the bundle's Order E-mail and Receipt Text field is not dynamic, so you will need to update it when you make changes such as removing SKUs from the bundle.) When customers purchase the bundle, order e-mails and receipts will show one block of Order E-mail and Receipt Text.
    - **Child SKU level:** If you clear all text from the bundle's Order E-mail and Receipt Text field, the Order E-mail and Receipt Text from the child SKUs will apply. When customers purchase the bundle, order e-mails and receipts will show separate blocks of Order E-mail and Receipt Text for each child SKU that uses that option. There will not be an entry for the bundle itself.

    For SKUs you offer through Web Store and Embedded Web Store eSellers, the Order E-mail and Receipt Text field will accept any of the valid HTML tags listed at http://www.webmonkey.com/2010/02/html_cheatsheet/.

    In addition, the HTML representations listed under "Name Code" and "Number Code" at http://www.webmonkey.com/2010/02/special_characters/ are valid anywhere the eSellerate system supports HTML.

    For related e-mail customization features, see "Entering Default Receipt Information" on page 155.

14. Click **Save**.

When you finish setting up the bundle, you can add it to one or more eSellers. Be sure to add all of the child SKUs to the eSellers, as well. If you don't want a child SKU to be available as an individual item in the eSeller, set the SKU's status to Hidden.

You can add SKUs to eSellers and set SKU statuses on the Usage tab of the SKU Detail page. See "Adding the SKU to Web Store or Embedded Web Store eSellers" on page 59.

Setting the SKU's Renewal Properties (Optional)

The Renewal tab is available only for SKUs that use subscriptions. Its purpose is to allow customers to choose a different SKU when renewing subscriptions. Your customers may also choose to continue with the original SKU, provided that you offer that SKU at subscription renewal.

The option of choosing a different SKU will be presented in the renewal reminder e-mails.

Note: Customers with "until cancellation" subscriptions do not receive renewal reminder e-mails. These customers will need to use eSellerate After-Purchase Services if they want to choose a different SKU for renewal.

Note: When you add a subscription SKU to an eSeller, be sure to also add all the additional SKUs that you are going to be offering at subscription renewal. This would be all the SKUs listed for the SKU on its Renewal tab, in the SKUs Offered at Subscription Renewal section.

Automatic Renewals Only

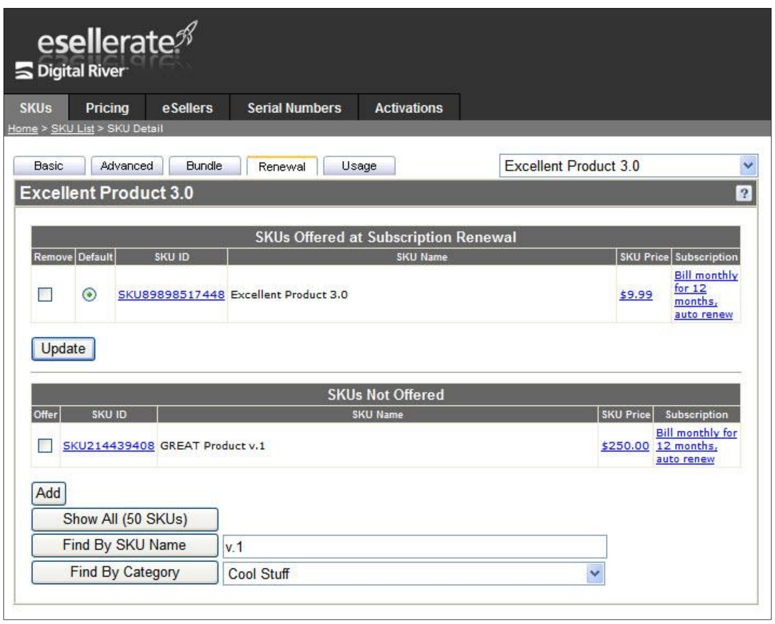
When the original SKU uses an automatic renewal, you can set the default SKU. The default is the SKU that will be used for automatic renewals if the customer does not choose a different one.

To set the default SKU, select the **Default** option for the desired SKU, and then click **Update**.

All Types of Renewals

To add SKUs that you want to offer at subscription renewal:

1. From the SKU Detail page, click the **Renewal** tab. The SKU's Renewal properties appear.



2. When the number of SKUs exceeds a certain number, some SKUs will be hidden. If the SKUs that you want to offer at subscription renewal are not showing, use any of the following methods to find them:
   - To see all the available SKUs, click **Show All (X SKUs)**.
   - You can search for a SKU by entering all or part of its name. The name search is case-insensitive.

- If your account includes multiple SKU categories (and there are SKUs set up to use them), there will be an option to search by category. (You can create categories for SKUs and Web Store/Embedded Web Store eSellers at Home > Categories.)

3. In the SKUs Not Offered section, select the **Offer** check box for each SKU that you want to offer.

> **Note:** To control the order in which SKUs appear as "Renewal Options" in renewal e-mails and eSellerate After-Purchase Services, add the SKUs one at a time in the required order. (You can see the current ordering in the SKUs Offered at Subscription Renewal section.) To make adjustments, remove the SKUs that are out of order, and then add them back in one at a time in the required order.

4. Click **Add**.

To remove SKUs that you do not want to offer at subscription renewal:

1. In the SKUs Offered at Subscription Renewal section, select the **Remove** check box for each SKU that you want to remove.
2. Do one of the following, depending on which option is available:
   - Click **Remove**.
   - Click **Update**.

> **Note:** A subscription SKU can renew into a non-subscription SKU. As an example of how this might be useful, your customers who are renewing would have the choice of beginning another subscription term, or buying the product for a lump sum.

See Also

"Setting Up Subscription-Based Licensing" on page 202

"Subscription Events Testing – Preview Orders" on page 110

Adding the SKU to Web Store or Embedded Web Store eSellers

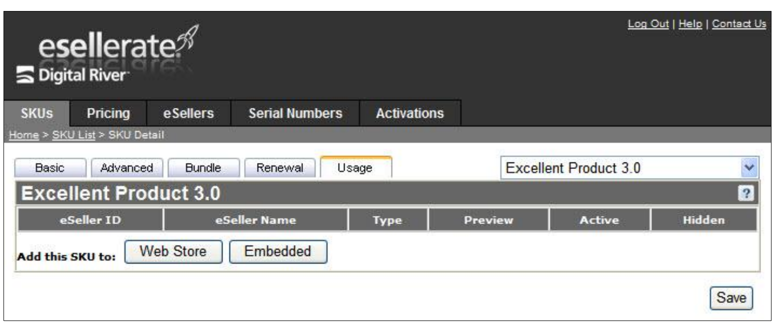
There are two ways to add SKUs to Web Store and Embedded Web Store eSellers:

- You can add the SKUs as part of the eSeller setup.
- You can add the SKUs to eSellers as part of the SKU setup. Information on that approach follows.

In addition to showing which eSellers offer the selected SKU, the Usage tab provides the ability to manage the eSeller-SKU relationships, as explained here.

To add the SKU to Web Store or Embedded Web Store eSellers:

1. From the SKU Detail page, click the **Usage** tab. The SKU's Usage properties appear.



2. Do one of the following:

- To add the SKU to Web Store eSellers, click **Web Store**.
- To add the SKU to Embedded Web Store eSellers, click **Embedded**.

3. In the window that displays, click to select the desired eSellers.
4. Click **Add**. The window for selecting eSellers closes, and the Usage tab reflects your changes.

To set the SKU's attributes for any one of the eSellers listed:

1. Click the appropriate **eSeller ID** field. A SKU Attributes page displays.
2. Set up the SKU attributes for the respective eSeller.
3. Click **Save Changes**. The Usage tab displays.

To set the SKU's statuses for one or more of the eSellers listed:

1. Check the boxes next to each status that applies. A SKU with **Active** status will be available through your eSellers that are operating in active mode. Use **Preview** status (which is enabled by default) to make the SKU available for testing eSellers in preview mode. Use **Hidden** if you are cross-selling or up-selling the SKU within the eSeller, and you want to offer the SKU only when your customers select other SKUs for their purchases.
2. Click **Save**.

Export Compliance

The following information relates to the export compliance obligations for SKUs sold through eSellerate. Settings for specifying export compliance (such as "ECCN" and "Country of Origin") are available on the SKU Basic tab.

What are my obligations to DR in connection with export?

Under DR's standard reseller agreements, the publisher or manufacturer of Products resold by DR (whether purchased directly from that party or from a third party distributor) are required to provide DR with some or all of the following export-related codes and classifications related to their Products In order for DR to ensure it is in compliance with its export obligations:

- **Export Control Classification Numbers**. A client will need to provide an Export Control Classification Number (ECCN) for each Product resold by DR. Every Product is designated or classified by the U.S. government for export purposes with an ECCN. An ECCN is an alpha-numeric classification used in the Commerce Control List (CCL) to identify items for export control purposes. A Product's ECCN classification is based on certain characteristics of that Product, including the nature of a Product, its functionality, and its capabilities.
  A Product's ECCN is used by DR as part of its compliance process to determine if that Product can be exported, to which countries (other than embargoed and, in some cases, sanctioned countries) it can be exported, and whether there are any restrictions on the export to a particular country that would require an export license if a license exception is not available.
- **Country of Origin**. A client will also need to provide, for each Product, the country of origin for each Product. Often referred to as the COO, the Country of Origin is the country in which the Product was manufactured or produced. When shipping from one country to another, the COO is important as it helps DR to determine whether a Product can be exported to a particular country, and the duty rate.
- **Schedule B/HTS Code**. A client will also need to provide, for each Product fulfilled physically, a Schedule B and Harmonized Tariff System ("HTS") code. Schedule B codes are used by the Bureau of Census to collect trade statistics, and are different both from Harmonized Tariff System codes (which are used to determine import duties) and ECCNs (which are used to determine whether a product can be exported without a license). By international agreement, most countries (including the US) recognize the same first 6 "harmonized" digits for HTS codes. Schedule B codes are based

on the international HTS system. HTS numbers and Schedule B numbers will be the same up to the first 6 digits as the importing country's classification code, after which, they will likely be very close or the same.

- **License Exception Code**. If a client's Product falls within a license exception (which means that DR can export that Product without a license), the client will need to provide the license exception code to DR in order for DR to be able to export that Product.
- **CCATS Code**. A Commodity Classification Automated Tracking System ("CCATS") code is an alpha-numeric code that is assigned by the US government once they have classified a Product according to the Export Administration Regulations (EAR), and is also required for certain Products as some exports (including encryption Products) require post-shipment reporting to the US government, and the CCATS code is a mandatory element of these reports.

Bundle Overview

You can use this feature to sell a collection of SKUs as a bundle.

Notes on bundles

- A bundle is a parent SKU that contains child SKUs.
- You can set the following properties at the bundle/parent SKU level, or you can allow each child SKU to set the properties separately:
    - Delivery Method
    - eCD File
    - eCD Layout
    - SKU Download
    - Serial Number
    - Terms of Sale
    - Subscription
    - eCD Delivery Frequency
    - Order E-mail and Receipt Text
- As an example of setting properties, if you set a SKU download at the bundle level, your customers will download one file when they purchase the bundle. Otherwise, if you allow each child SKU to set a download, your customers will download a separate file for each of the SKUs. (This example assumes that you do not override the SKU download at the eSeller level.) For more information, see "Setting Up the SKU as a Bundle (Optional)" on page 53.
- Not all SKUs may be available for bundling. SKUs that are themselves bundles or that are available to channels cannot be contained in a bundle. A SKU that is offered through an Integrated eSeller cannot be made a bundle.
- For a bundle to be available for sale in an eSeller, all of the child SKUs must also belong to that eSeller. The child SKUs can be available for sale individually, or you can hide them by setting their statuses to Hidden.
- Most eSellerate features work the same for bundles as they do for any other SKUs. Features that may warrant some additional consideration when using them with bundles are listed in the following section.

Feature	Notes

Subscriptions	• If you apply a subscription at the bundle level, there will be a charge to the customer's payment method for the initial purchase, followed by a charge for each scheduled billing during the duration of the subscription. This behavior is the same as for any other SKU (with the exception of child SKUs).
	• If you apply a subscription at the child SKU level, there will be no subscription charges at the time of purchase. Instead, the subscription charges will begin with the first scheduled billing. This behavior allows you to set a regular price on the bundle (which customers will pay at the time of purchase) and use subscriptions for the child SKUs.
	• If you use a combination of regular pricing and subscriptions with bundles, you should make sure your customers understand the charges they are incurring. For example, in the following scenario, some customers might not realize they are incurring costs beyond the $300.00 for the initial purchase:
	    • Bundle A = $300, one-time cost at the time of purchase
	    • Child SKU 1 = $10 monthly for 12 months, first billing one month after the purchase
	    • Child SKU 2 = $20 monthly for 12 months, first billing one month after the purchase
	• With the preceding scenario, the potential for error can be even greater if you allow multi-quantity sales for the bundle. For example, a customer who purchases a quantity of 2 will have total billings of $60 per month with this bundle, in addition to the $600 for the initial purchase.
	• The subscription terms of conditions of individual child SKUs are consolidated into one block of text that customers will need to agree to when purchasing the bundle.
	• When a bundle includes multiple child SKUs with subscriptions, customers who purchase the bundle are starting separate subscriptions for each of the SKUs. Each SKU has its own billings and steps that may be required for renewals.

Pricing	• The pricing set for the bundle/parent SKU determines what customers pay for the bundle. Child SKU settings for pricing apply only when the SKUs are available for sale individually. • This information applies to SKU pricing only. Subscription pricing can be set at the child SKU level. See the preceding entry for details.
Multi-Quantity Sales	• The "Allow multi-quantity sales" setting for the bundle/parent SKU determines whether or not customers can purchase multiple quantities of the bundle. Child SKU settings for multi-quantity sales apply only when the SKUs are available for sale individually
Country Restrictions	• The country restrictions setting for the bundle determines whether or not customers in certain countries will be able to purchase the bundle. Child SKU settings for country restrictions apply only when the SKUs are available for sale individually.
eCD	• When your customers purchase eCD for a bundle, you can provide one backup file, or a separate backup file for each child SKU that uses a download. See "Valid SKUs" on page 230.

Feature	Notes
Shipping	• A bundle inherits the combined shipping units of the child SKUs. For example, if there are two child SKUs, with one using 3 shipping units and the other using 6 units, customers purchasing the bundle would pay for 9 shipping units. • A bundle's "Required shipping <x> Units" setting on the Advanced tab will be checked and non-editable if any child SKUs require shipping. Also, this setting will show the combined shipping units of all child SKUs. • The only way to require shipping for a bundle is to set it on the child SKUs.
Custom Layouts	• Some of the eSellerate variables related to bundles are conditionally required. (The variables help page at http://publishers.esellerate.net/customvar.aspx uses orange checkmarks to denote conditionally required.) As with other conditionally required variables, the inspection process will show a warning if you have excluded any of these variables from your layout. At runtime, if one of these variables is not present and the information that it represents is required, the eSellerate system will present an emergency input page that requires the customer to enter the missing information. • See "Notes on Bundles and Enhancements for Serial Numbers" on page 65.

Shopping Cart Behavior	• When a bundle is added to the shopping cart as an up-sell, the quantities of SKUs already in the cart may be decreased to prevent unintended duplicates. For example, assume that the cart contains SKU A with quantity 2 and SKU B with quantity 1. If Bundle C includes SKU A and SKU B, when that bundle is added to the cart as an up-sell (with quantity 1) the behavior is as follows:
	    • Decrease the quantity of SKU A to 1.
	    • Remove SKU B from the cart.
	    • After these adjustments, the items remaining in the cart are Bundle C with quantity 1 and SKU A with quantity 1.
	• When a bundle is added to the cart as a regular item (not an up-sell or a cross-sell), the behavior is the same as listed above for the up-sell scenario.
	• In contrast to the previous two scenarios, adding a bundle to the cart as a cross-sell item has no effect on the quantities of SKUs already in the cart. The reason is that cross-sell offers are in addition to what customers have selected for their purchases.

Displaying in Web Stores	• Like other SKUs, bundles appear in the catalog and shopping cart as single line items. If you need to provide information about the bundle contents (the child SKUs) to help customers make their purchase decisions, you can use the bundle's Short Description and "More Info" Text fields. The contents of the bundle will be visible to customers after the purchase on online receipts and in order confirmation e-mails. • For a bundle to be available for sale in active (non-preview) orders, the bundle and all of its child SKUs must be set to Active status. You can use other statuses (Hidden and Preview) in conjunction with Active, but Active status is a requirement for all the bundle SKUs in this scenario.

Feature	Notes

Returns	• Returning an entire bundle is generally allowed without restrictions.
	• Whether or not you can return individual child SKUs depends on the bundle configuration. For example, you cannot return individual child SKUs for the following bundles:
	    • A bundle with no subscription methods applied
	    • A bundle with a subscription method applied at the bundle level
	• As a general rule, you can return individual child SKUs for a bundle that has subscription methods applied at the child SKU level.
	• For a bundle purchase that involved multiple quantities and multiple serial numbers, you can select the quantities and the specific serial numbers to return.
	• At present, canceling a subscription for a bundle cancels the subscription for all quantities purchased. This is true whether you cancel the subscription through the Returns page of the Sales Manager, or your customer cancels the subscription through eSellerate After-Purchase Services.

SDKs	• The following is an example of an eSellerate indexed ("Loop Only") variable as it is returned in the result data of Purchase or CheckForUpdate calls:
	
	_OrderItem3_SNItem4.SerialNumber
	
	Because the indexing is zero-based, this example refers to the fifth serial number for the fourth item in the cart. That fourth item could be a plain SKU, or a bundle SKU with a serial number set assigned to the parent. Also, to allow for the multiple serial numbers, that fourth item would have "Issue serial numbers in ratio to quantity" enabled.
	• To activate a serial number for a bundle/parent SKU, you can use the same methods as you would for a plain SKU. Your options include:
	    • Pass the SKU ID and an activation ID in the parameters of a Purchase or CheckForUpdate call. This approach works for single serial numbers only. When multiple serial numbers are issued—which can occur when the parent has "Issue serial numbers in ratio to quantity" enabled—none of the serial numbers will be activated. If you need to activate one of the serial numbers in that instance, you can use the method below.
	    • Get the serial number from result data (returned from Purchase or CheckForUpdate calls) or some location where you have stored it, and activate it by calling ActivateSerialNumber.
	• You cannot use Purchase or CheckForUpdate calls to activate serial numbers for child SKUs, because those calls do not provide a way to specify the child SKUs. An alternative is to get the serial numbers from result data (returned from Purchase or CheckForUpdate calls) and activate each serial number by calling ActivateSerialNumber.
	• When the bundle/parent SKU has "Issue serial numbers after purchase" enabled (and the purchase quantity is greater than 1) you cannot activate a serial number for the SKU with a Purchase or CheckForUpdate call.

Feature	Notes

Reporting	• The Order Detail page (accessible from the Orders, Fulfillment and Voids editors) lists bundles and child SKUs as individual line items. You can expand or close the child SKU lists by clicking the plus or minus symbols.
	• You can use version 3 of the XML order notice to receive real-time order information that includes bundles.
	• The automated daily summary report file (available at Home > Account Information) does not include bundle information. If you use bundles, two alternatives to this report are:
	  ◦ Version 3 of the XML order notice
	  ◦ The Order Lookup Web Service

Bundles Feature Notes

Notes on Bundles and Enhancements for Serial Numbers

On May 5, 2009, eSellerate released SKU bundles, along with enhancements for serial numbers that included deferred serial numbers and the "Issue serial numbers in ratio to quantity" SKU option. The changes to allow these new options included:

- **New eSellerate variables** – Forty-two eSellerate variables were added. For the current listing of all eSellerate variables, see the variables help pages at http://-publishers.esellerate.net/customvar.aspx and http://-publishers.esellerate.net/embeddedvar.aspx. (To view help on these pages, hover your mouse over the variable name, or click the bullet to the left of the variable.)
- **Custom Layout updates** – There were changes to three or four HTML pages in each default lay-out.

Custom Layouts that you create after May 5, 2009, (using a default layout as your starting point) will use the new variables and include the layout changes by default. Layouts that you created prior to that date will require some updates, as described here.

Preparing Custom Layouts for the New Functionality

The HTML files that changed for each default layout were:

- **Embedded Multi-Page Layout**: Receipt.htm, EmbeddedMultiConfirmation.htm, Embed-dedMultiSerialNumberPrompts.htm
- **Embedded Simple Layout**: Receipt.htm, EmbeddedSimpleCart_CardsOnly.htm, Embed-dedSimpleConfirmation.htm, EmbeddedSimpleCart.htm
- **Multi-Page Layout**: Receipt.htm, MultiSerialNumberPrompts.htm, MultiConfirmation.htm
- Simple Layout: Receipt.htm, OnePageCart.htm, OnePageConfirmation.htm, OnePageCart_Card-sOnly.htm
- **Stylized Embedded Web Store - Option 1**: Receipt.htm, EmbeddedMultiConfirmation.htm, EmbeddedMultiSerialNumberPrompts.htm
- **Stylized Embedded Web Store - Option 2**: Receipt.htm, EmbeddedMultiConfirmation.htm, EmbeddedMultiShippingMethod.htm, EmbeddedMultiSerialNumberPrompts.htm

To update layouts for these changes, you can do either of the following:

- Create a temporary layout that is the same type as the one you want to update, and then use HTML files from that layout to replace the outdated ones. This would involve downloading layout files from the temporary layout, and uploading the files to the layout that requires the updates. For information on downloading and uploading layout files, see "Files Tab" on page 277. Also note:

  - Compared to the other approach listed here, this one is typically faster, and it involves less risk for errors.
- Paste the required code into each of the outdated HTML files. A document that explains this process is available for downloading through this link: http://-support.esellerate.net/FileManagement/Download/f4420aac2f1f474e9b5636db6e21065a

Note: A system page provides the receipts for layouts that do not have a Receipt Page assigned. That system page is functionally the same as Receipt.htm in the default layouts, so it will work with bundles and the serial number enhancements previously mentioned.

Setting Up Pricing

Native Currency Pricing (NCP) is the ability to price items in non-USD currencies. You can use this option to supplement the default pricing method, which involves setting a single price in U.S. dollars, and allowing eSellerate to convert that price for non-USD currencies as needed.

Overview

The base currency for all pricing in the eSellerate Sales Manager is USD. For instance, when you set up an item such as a SKU or a volume discount, you enter the USD price. If you enter no additional prices for the item, eSellerate uses the USD price as the basis for converting and displaying prices in non-USD currencies.

NCP is a way to prevent the conversion of prices from USD to other currencies. With NCP, you set the exact price that your customers will pay in a given non-USD currency. Some advantages of this option include:

- There are none of the odd amounts that sometimes result from currency conversions.
- You can advertise the prices, because they won't vary according to exchange rates.

Notes

- This feature has just one purpose: setting the non-USD prices that are presented to your customers. It has no other effect on any other aspect of currency usage for you or your customers.
- You can set NCP for any non-USD currencies that eSellerate supports.
- The Sales Manager provides the following tabs for setting NCP:
  - SKUs
  - Volume Discounts
  - Cross-Sell
  - Coupons
  - eCD
  - Up-Sell
  - Preferences
- The Preferences tab determines which currencies are available for setting NCP. This feature allows you to work with only the currencies that you need.
- Some of the Pricing tabs will show percentage discounts when applicable, but those discounts will not be editable.

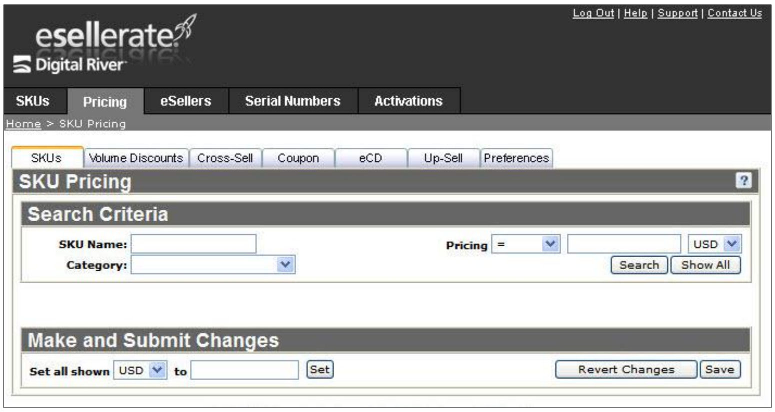
Information on how to set up NCP appears as follows:

- "Setting Native Currency Pricing for SKUs" on next page
- "Setting Native Currency Pricing for Volume Discounts" on page 69
- "Setting Native Currency Pricing for Cross-Sell SKUs" on page 69
- "Setting Native Currency Pricing for Coupons" on page 70
- "Setting Native Currency Pricing for eCD" on page 71
- "Setting Native Currency Pricing for Up-Sell SKUs" on page 71
- "Setting Preferences for Native Currency Pricing" on page 72

Setting Native Currency Pricing for SKUs

To set NCP for SKUs:

1. Click the **Pricing** tab. The Pricing page appears.
2. Click the **SKUs** tab. The SKU Pricing properties appear.



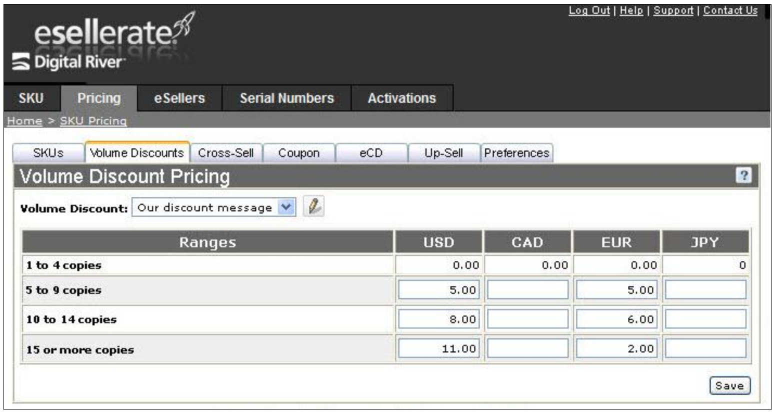
3. In the **Search Criteria** section, do one of the following:
   - To search for specific SKUs, set up your search criteria, and then click **Search**.
   - To show all SKUs, click **Show All**.
4. To set individual NCP amounts, click in the appropriate field, and enter a price. To advance from a field after you edit it, you can use the **Tab** key, or click in another field.
5. To set all NCP amounts shown for a given currency to the same value, do the following:
   1. In the **Make and Submit Changes** section, select a currency.
   2. Enter a price.
   3. Click **Set**.
6. To revert all changes made since the last save, click **Revert Changes**.
7. When you finish entering NCP amounts, click **Save**.

Note: A field with blue highlighting indicates a price that has been edited but not yet saved.

Setting Native Currency Pricing for Volume Discounts

To set NCP for volume discounts:

1. Click the **Pricing** tab. The Pricing page appears.
2. Click the **Volume Discounts** tab. The Volume Discount Pricing properties appear.



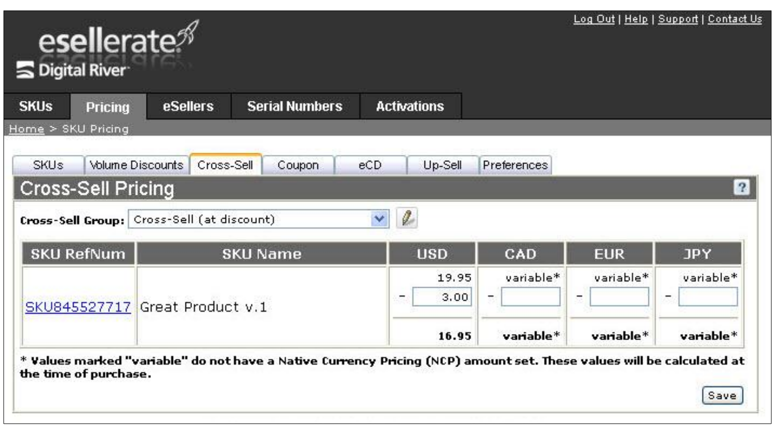
3. From the **Volume Discount** list, select a discount item for setting NCP. If you need to edit or create a volume discount item before you make your selection, click **Save**, and then click the **Edit Volume Discounts** icon.
4. For each NCP amount that you want to set, click in the appropriate field, and enter a price. To advance from a field after you edit it, you can use the **Tab** key, or click in another field.
5. When you finish entering NCP amounts for the selected volume discount item, click **Save**.

Note: A field with blue highlighting indicates a price that has been edited but not yet saved.

Setting Native Currency Pricing for Cross-Sell SKUs

To set NCP for cross-sell SKUs:

1. Click the **Pricing** tab. The Pricing page appears.
2. Click the **Cross-Sell** tab. The Cross-Sell Pricing properties appear.



3. From the **Cross-Sell SKU Group** list, select a discount item for setting NCP. If you need to edit or create a cross-sell SKU group before you make your selection, click **Save**, and then click the **Edit Cross-Sell Groups** icon.

4. For each NCP amount that you want to set, click in the appropriate field, and enter a price. To advance from a field after you edit it, you can use the **Tab** key, or click in another field.
5. When you finish entering NCP amounts for the selected group, click **Save**.

Note: A field with blue highlighting indicates a price that has been edited but not yet saved.

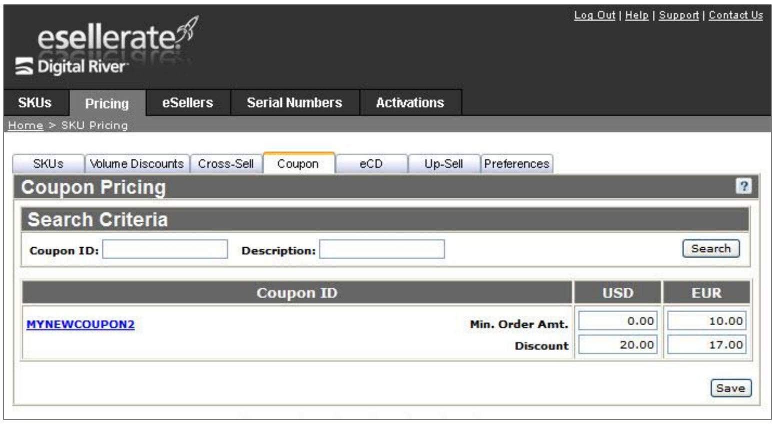
Setting Native Currency Pricing for Coupons

Notes on setting NCP for coupons

- The option of setting NCP is available for coupons with Preview status only. (You can edit coupons to change their status from Active to Preview as needed.)
- Once you save and activate a coupon, you will not be able to review its pricing configuration through the Coupon tab. However, you can use the Coupons by Currency pricing report for that purpose.
- For each currency listed on the Coupon tab, you can set the minimum order amount, and in some instances, the discount. You cannot edit percentage discounts, or discounts that provide free shipping.
- Make sure that your coupon discounts do not result in order totals that are greater than $0 and less than $1 USD. Because payment processors cannot process transactions for amounts less than $1, a coupon discount that reduces the order total to less than $1 will force eSellerate to provide the product for free. Publishers accept complete responsibility for the setup and implementation of their coupons to prevent this occurrence.

To set NCP for coupons:

1. Click the **Pricing** tab. The Pricing page appears.
2. Click the **Coupon** tab. The Coupon Pricing properties appear.



3. By default, the Coupon tab will display all coupons for which you can set NCP. If you would like to narrow the list down, you can use the provided search functions.
4. For each NCP amount that you want to set, click in the appropriate field, and enter a price. To advance from a field after you edit it, you can use the **Tab** key, or click in another field.
5. When you finish entering NCP amounts, click **Save**.

Note: A field with blue highlighting indicates a price that has been edited but not yet saved.

Setting Native Currency Pricing for eCD

Notes on setting NCP for eCD

- This NCP option applies only to SKUs that support eCD Optional. For SKUs that support eCD Included, you need to add eCD into the SKU price.
- NCP amounts must cover the eSellerate eCD charge. You can find that charge on the eCD Configuration tab in your publisher account. If an eCD purchase in a non-USD currency converts to less than the eSellerate eCD charge, the difference will be subtracted from the publisher's payment.
  - If you use DVD cases to package your CDs for eCD Optional, there is an additional charge of $2.00 USD. NCP amounts must also cover that charge.
- Setting a USD amount on the eCD tab changes your publisher markup on the eCD Configuration tab, and vise versa.

To set NCP for eCD:

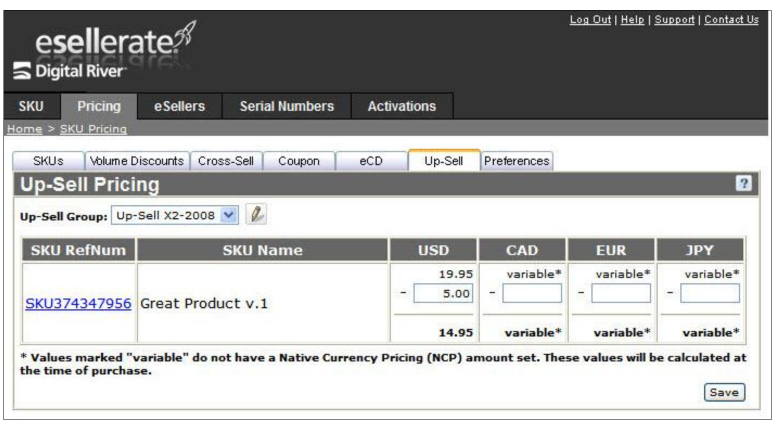
1. Click the **Pricing** tab. The Pricing page appears.
2. Click the **eCD** tab. The eCD Pricing properties appear.
3. For each NCP amount that you want to set, click in the appropriate field, and enter a price. To advance from a field after you edit it, you can use the **Tab** key, or click in another field.
4. When you finish entering NCP amounts, click **Save**.

Note: A field with blue highlighting indicates a price that has been edited but not yet saved.

Setting Native Currency Pricing for Up-Sell SKUs

To set NCP for up-sell SKUs:

1. Click the **Pricing** tab. The Pricing page appears.
2. Click the **Up-Sell Pricing** tab. The Up-Sell Pricing properties appear.



3. From the **Up-Sell Group** list, select a group for setting NCP. If you need to edit or create an up-sell SKU group before you make your selection, click **Save**, and then click the **Edit Up-Sell Groups** icon.
4. For each NCP amount that you want to set, click in the appropriate field, and enter a price. To advance from a field after you edit it, you can use the **Tab** key, or click in another field.
5. When you finish entering NCP amounts for the selected group, click **Save**.

Note: A field with blue highlighting indicates a price that has been edited but not yet saved.

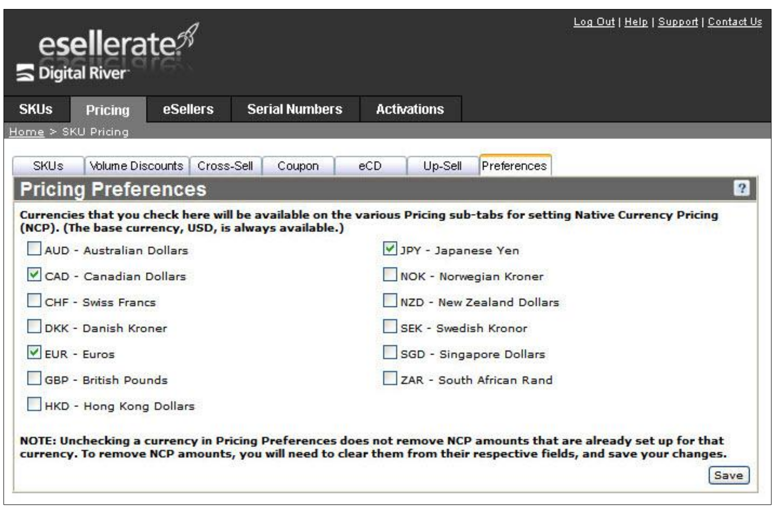
Setting Preferences for Native Currency Pricing

Notes on Pricing Preferences

- Unchecking a currency in Pricing Preferences does not remove NCP amounts that are already set up for that currency. To remove NCP amounts, you will first need to make sure the required currencies are checked in Pricing Preferences. Then go to the Pricing tabs and clear the NCP amounts from their respective fields. Be sure to save your changes.
- As an alternative to clicking through the Pricing tabs to review your configurations, you can use the following pricing reports:
    - SKU Pricing by Currency
    - Volume Discount by Currency
    - Cross-Sell Discount by Currency
    - Coupons by Currency
    - Up-Sell Discount by Currency
- Internet Explorer users: To allow the eSellerate Sales Manager to save your pricing preferences, the "Check for newer versions of stored pages" setting must be set to something other than "Never." A typical way to access this setting is as follows:
    1. In Internet Explorer, click the **Tools** menu and select **Internet Options**.
    2. On the **General** tab, click **Settings**.

To set your preferences for NCP:

1. Click the **Pricing** tab. The Pricing page appears.
2. Click the **Preferences** tab. The Pricing Preferences appear.



Currencies that you check in the Pricing Preferences dialog box will be available on the various Pricing tabs for setting NCP. (The base currency, USD, is always available.) By showing only the currencies that you currently need, you can simplify the user interfaces and make it easier to review and set NCP.

To set your pricing preferences, check the currencies that you want to use for setting NCP, and then click **Save**.

Creating eSellers

The eSellerate system enables you to sell your product directly to the end user from within your application or from your own online store. The different methods are called eSellers. For information about creating eSellers, please see the following:

- "Creating an Embedded Web Store eSeller" on page 320
- "Creating an Integrated eSeller" on page 340
- "Creating a Web Store eSeller" on page 359

Creating Serial Numbers

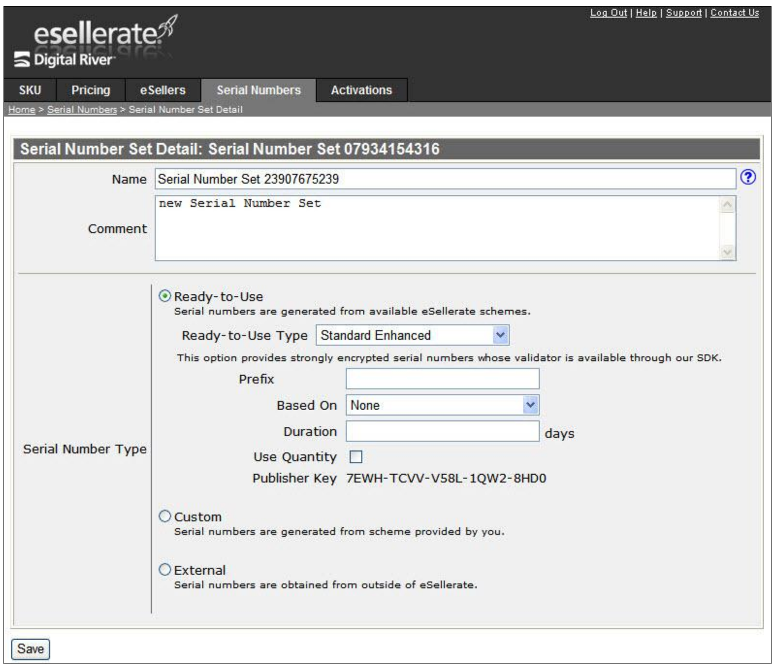
The eSellerate system offers several ways to issue serial numbers for the products you sell. These options are available through serial number sets, which you create using the Serial Numbers editor, as explained here.

To learn how to assign a serial number set to a SKU, see "Creating the SKU and Setting Its Basic Properties" on page 43.

> **Note**: You should never use more than one browser window to manage your account in the eSellerate Sales Manager. Any editing that you do in multiple windows can cause data to be lost.

To create a serial number set:

1. Click the **Serial Numbers** tab. The Serial Number Set List page appears.
2. Click **New**. The Serial Number Set Detail page appears.



3. Enter a name for this serial number set, and any comments. This information is for internal identification only, and will not be visible to your customers.
4. Make a selection from the **Serial Number Type** options and enter any required information. (See "Serial Number Type Options" below.)
5. Click **Save Changes**.

Serial Number Type Options

There are three main types of serial numbers available for you to use:

- **Ready-to-Use** – Ready-to-Use serial numbers are generated from available eSellerate schemes. All that you need to do to set up these serial numbers is fill out the available settings and save your changes. See "Ready-to-Use" on the facing page.

- **Custom** – If you already have a serial number generation scheme, we may be able to run your code on the eSellerate servers. In this case, you can use any of the fields provided in the serial number set to pass additional information to your code. See "Custom" on page 83.
- **External** – External serial numbers are obtained from outside of eSellerate. See "External" on page 84.

Ready-to-Use

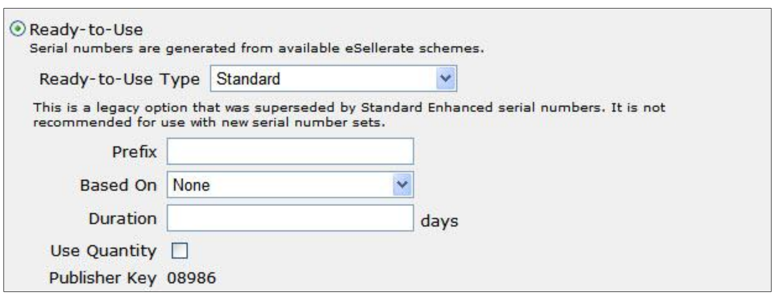
Ready-to-Use serial numbers are generated from available eSellerate schemes. All that you need to do to set up these serial numbers is fill out the available settings and save your changes.

Your choices for Ready-to-Use serial numbers are:

- "Standard" below
- "Standard Enhanced" on next page
- "eSellerate Armadillo" on page 79
- "Armadillo" on page 80
- "RPN" on page 82

Standard

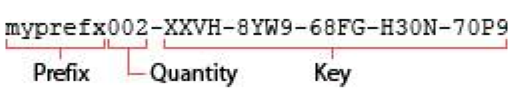
Standard is a legacy option that was superseded by Standard Enhanced serial numbers. It is not recommended for use with new serial number sets.



Note: Most users will never see the Standard serial number option. The only time the option is available is when editing older serial number sets that are still set up as Standard.

Note: Your application can check the validity of a Standard serial number through an API call to ValidateSerialNumber. For more information about this API function, see the eSellerate SDK Reference.

For reference purposes, an example of a Standard serial number that includes a prefix and the purchase quantity follows:



Note: For the key portion of a Standard serial number, eSellerate does not use the letters I, O, U or Z because they can be easily confused with other characters. To accommodate customers who mistakenly enter these letters in Standard serial numbers, the validation function (an API call to ValidateSerialNumber) will substitute the number 1 for I, the number 0 for O, the letter V for U and the number 2 for Z. The function also will substitute uppercase characters for lowercase ones.

To create a Standard serial number set:

1. From the **Ready-to-Use Type** list, select **Standard**.
2. In the **Prefix** field, enter a prefix that will help you quickly identify this serial number set. You can use any alphanumeric characters, except for colons (:). The required length is seven characters.
3. Your serial number generation can be based on the customer's first and last name, the company name, or none of these options. Make your selection from the **Based On** list.
4. In the **Duration** field, enter the number of days that the serial number will be functional (optional). This setting causes serial numbers to contain the date of expiration, which you can find with the validation function. You can then use the date of expiration to limit customer usage of your demo software or shareware.
5. If you select the **Use Quantity** check box, the serial numbers will indicate the quantity purchased. (Multiple quantity sales require a special setting at the SKU level. See "Setting the SKU's Advanced Properties (Optional)" on page 49.)
6. Click **Save Changes**.

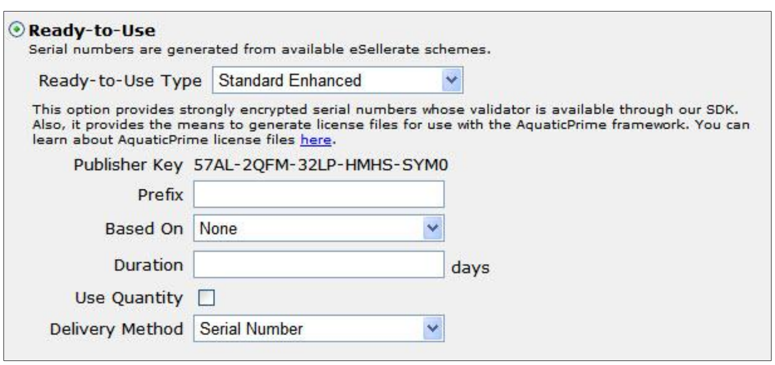
You also have the option to base your Standard serial numbers on dynamic information (such as user input or machine ID) sent by your application. In this case, your application would use a special parameter (extraData) to pass the information to the eSellerate servers during an API call to Purchase or CheckForUpdate. This may be any kind and amount of information you choose, as long as it's packaged as a single string.

For more information about these API functions and the extraData parameter, see the eSellerate SDK Reference.

Note: You can also manually generate a serial number. See "Manually Generating Serial Numbers" on page 88.

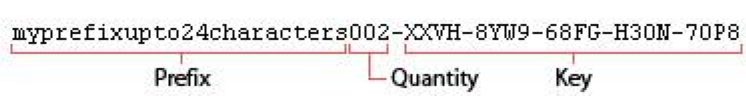
Standard Enhanced

The Standard Enhanced option provides strongly encrypted serial numbers whose validator is available through our SDK.



Note: Your application can check the validity of a Standard Enhanced serial number through an API call to ValidateSerialNumber. For more information about this API function, see the eSellerate SDK Reference.

For reference purposes, an example of a Standard Enhanced serial number that includes a prefix and the purchase quantity follows:



Note: For the key portion of a Standard Enhanced serial number, eSellerate does not use the letters I, O, U or Z because they can be easily confused with other characters. To accommodate customers who mistakenly enter these letters in Standard Enhanced serial numbers, the validation function (an API call to ValidateSerialNumber) will substitute the number 1 for I, the number 0 for O, the letter V for U and the number 2 for Z. The function also will substitute uppercase characters for lowercase ones.

To create a Standard Enhanced serial number set:

1. From the **Ready-to-Use Type** list, select **Standard Enhanced**.
2. In the **Prefix** field, enter a prefix that will help you quickly identify this serial number set (optional). You can use any alphanumeric characters, except for colons (:). The length can be 0-24 characters.
3. Your serial number generation can be based on any of the following:
   - None
   - The customer's first and last name
   - The company name
   - Some special data (Prompted Data) that the customer is required to enter

   Make your selection from the **Based On** list.

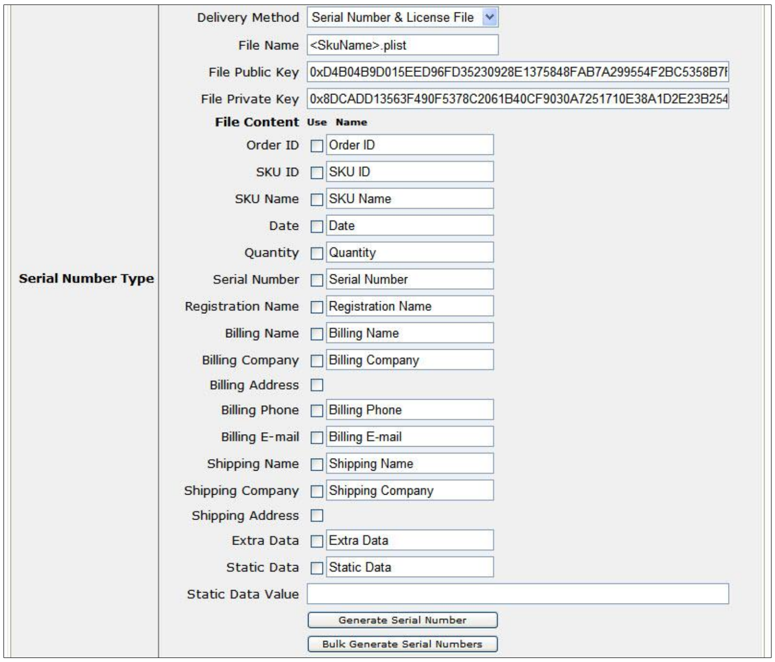
   See also "The Extra Data Option" on page 79.
4. With the Prompted Data feature, you can use prompts to base your serial number generation on customer input. If you enable this feature, your eSellerate web stores (standard and embedded) will prompt customers to enter specific information as part of the purchase process.

   From the **Prompt For** list, select the information your web stores should require for SKUs that use this serial number set. Your choices are as follows:
   - None
   - RegCode
   - Palm OS® HotSync Name
   - Pocket PC Owner Name
   - (Custom Prompt)

   Note: When appropriate, online help will be available to show your customers how to locate handheld device information such as RegCode.
5. The **Custom Prompt** field appears/applies only when you select the "(Custom Prompt)" option in the Prompt For list. Text that you enter here (up to 50 characters) will define the prompt displayed to your customers. For example, if you enter "Nickname" in the Custom Prompt field, your web store will display "**Nickname:** [input field]" when that information is required for a SKU purchase.
6. In the **Duration** field, enter the number of days that the serial number will be functional (optional). This setting causes serial numbers to contain the date of expiration, which you can find with the validation function. You can then use the date of expiration to limit customer usage of your demo software or shareware.
7. If you select the **Use Quantity** check box, the serial numbers will indicate the quantity purchased. (Multiple quantity sales require a special setting at the SKU level. See "Setting the SKU's Advanced Properties (Optional)" on page 49.)
8. In addition to providing strongly encrypted serial numbers, the Standard Enhanced option provides the means to generate license files for use with the AquaticPrime framework. You can learn about AquaticPrime license files at http://www.aquaticmac.com/. Notes on using license files with eSellerate are available at "AquaticPrime License Files" on page 91.

If you do not need to generate a license file, you can accept the default setting for **Delivery Method** (**Serial Number**), save your changes, and then skip to "The Extra Data Option" on the facing page. Otherwise, you can choose one of the following options for generating a license file:

- **License File** – Order receipts and confirmation e-mails will provide a link to the license file. (The serial number is generated as usual, but not shown to customers.)
- **Serial Number & License File** – Order receipts and confirmation e-mails will list the serial number and provide a link to the license file.



9. The **File Name** field determines the name of the generated license files. The default value (<Sku-Name>.plist) consists of the SKU name variable (stripped of HTML and non-alphanumeric characters) and a .plist extension. Spaces are replaced with underscores.

   You can override the default value with variable or static values, and any file extension.

   The static values can be up to 256 characters and are not restricted to alphanumeric. No character stripping or variable substitution occurs for static values, and they do not need to be enclosed in brackets.

   You can use any of the following variable values for the file name:

   - SkuName
   - SerialNumber
   - SKUID
   - OrderID
   - BillingName (*first and last combined*)
   - RegistrationName (*first and last combined*)

   Variables must be enclosed in brackets, and can be combined in any order to form the file name, as in the following example:

   <SKUName>_<BillingName>.plist

10. When you select the license file option, the editor generates a key pair to fill in the **File Public Key**

and **File Private Key** fields. You can copy the key pair for use with your client Aquatic Prime validation.

If you need to mimic your client AquaticPrime generation and verification, you can paste existing key pairs into the File Public Key and File Private Key fields. The editor will validate the key pair when you save the serial number set. If the key pair is invalid, you will have the option to correct it, or click a button to generate a new key pair.

11. Generated license files always include a signature, and can optionally include a number of additional items such as date, quantity and registration name.You can select the additional items in the options under **File Content**, **Use** and **Name**.

    To include an item in the license files, select its **Use** check box. (None of the items are required.)

    The **Name** value determines the name for the item's name-value pair in the license files. You can enter a new name (up to 50 characters) to override the default one for the item, if desired.

    > **Note:** If you override text for a **Name** value, you must also select the **Use** check box for the corresponding item. If you do not do this, your changes will not be applied when you save the serial number set.

    > **Note:** Two items—Billing Address and Shipping Address—do not provide a name override because selecting either of them causes the license files to include multiple data fields for the complete value.

    In addition to being able to include variable values, you can specify a static value to be included in all the license files. To use this option, select the **Use** check box for **Static Data**, and then enter a value in the **Static Data Value** field. There are no character or size restrictions on this value.

12. Click **Save Changes**.

The Extra Data Option

In addition to the Based On settings for the serial number set, you have the option to base your Standard Enhanced serial numbers on dynamic information (such as user input or machine ID) sent by your application. In this case, your application would use a special parameter (extraData) to pass the information to the eSellerate servers during an API call to Purchase or CheckForUpdate. This may be any kind and amount of information you choose, as long as it's packaged as a single string.

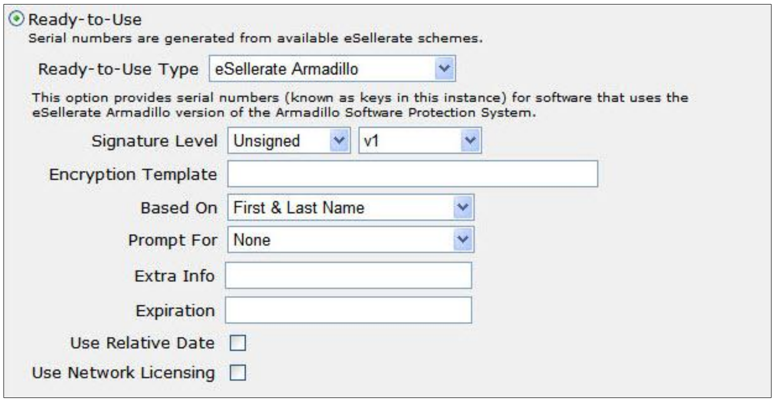
> **Note**: There is nothing that you need to enable in a Standard Enhanced serial number set to allow it to work with the Extra Data option.
>
> You can use the Extra Data option in conjunction with the Based On options, or on its own (with **Based On** set to **None**).

For more information about these API functions and the extraData parameter, see the eSellerate SDK Reference.

> **Note:** You can also manually generate a serial number. See "Manually Generating Serial Numbers" on page 88.

eSellerate Armadillo

This option provides serial numbers (known as keys in this instance) for software that uses the eSellerate Armadillo version of the Armadillo Software Protection System.



Prerequisites

In order to use this serial number option, you must:

- Be a licensed Armadillo user
- Have already protected your software with Armadillo

Creating an eSellerate Armadillo Serial Number Set

Whenever applicable, the settings that you choose for this serial number set should match the ones you used in the Armadillo project to design the software protection. Detailed information about each of those settings is available in the Armadillo help system.

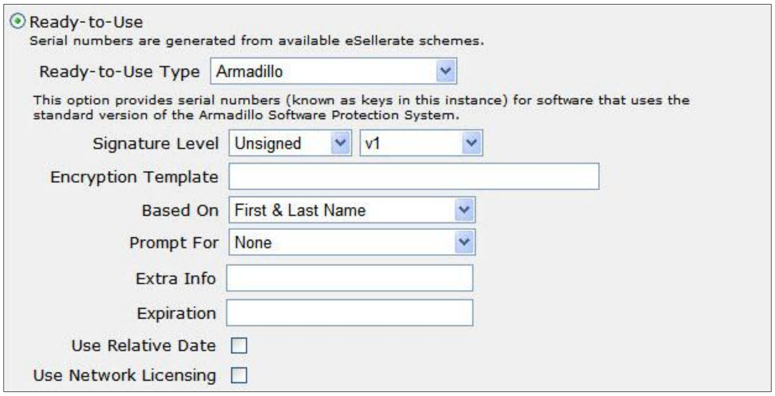
To create eSellerate Armadillo serial number set:

1. From the **Ready-to-Use Type** list, select **eSellerate Armadillo**.
2. Use the **Signature Level** lists to select the Signature Level and key version used in your Armadillo project. Your options are as follows:
   - **v1** – Signature Level 0 (Unsigned) only
   - **v2** – Signature Levels 0 (Unsigned) through 4
   - **v3** – Signature Levels 0 (Unsigned) through 9
   - **v3 Short Key** – (for issuing Armadillo ShortV3 keys) Signature Levels 1 through 10
3. In the **Encryption Template** field, enter the Encryption Template used in your Armadillo project.
4. Your key generation must be based on either the customer's first and last name or the company name. Make your selection from the **Based On** list.
5. Click **Save Changes**.

Note: You can disregard the following serial number set options because they are not available with the eSellerate Armadillo version of the protection system: **Prompt For**, **Extra Info**, **Expiration**, **Use Relative Date** and **Use Network Licensing**.

Armadillo

This option provides serial numbers (known as keys in this instance) for software that uses the standard version of the Armadillo Software Protection System.



Prerequisites

In order to use this serial number option, you must:

- Be a licensed Armadillo user
- Have already protected your software with Armadillo

Creating an Armadillo Serial Number Set

Whenever applicable, the settings that you choose for this serial number set should match the ones you used in the Armadillo project to design the software protection. Detailed information about each of those settings is available in the Armadillo help system.

To create an Armadillo serial number set:

1. From the **Ready-to-Use Type** list, select **Armadillo**.
2. Use the **Signature Level** lists to select the Signature Level and key version used in your Armadillo project. Your options are as follows:
    - **v1** – Signature Level 0 (Unsigned) only
    - **v2** – Signature Levels 0 (Unsigned) through 4
    - **v3** – Signature Levels 0 (Unsigned) through 9
    - **v3 Short Key** – (for issuing Armadillo ShortV3 keys) Signature Levels 1 through 10

    Note: If you're matching your settings from a SoftwarePassport for Mac project, you must select Signature Level **10** and **v3 Short Key** for this step.
3. In the **Encryption Template** field, enter the Encryption Template used in your Armadillo project.
4. Your key generation must be based on either the customer's first and last name or the company name. Make your selection from the **Based On** list.

The remaining options for this type of serial number set enable you to store certain registration information in the key, rather than in your program.

5. The "Prompt For" option applies if you use Armadillo's Hardware Locking feature to restrict usage of the registered software to a single computer, and an eSellerate web store (regular or embedded) will handle the transaction. (Integrated eSeller information is noted below.) In this case, your web stores will need to prompt customers to enter the computer's unique identifier—called a Hardware Fingerprint—as part of the purchase process.

    From the **Prompt For** list, select the prompt that your web stores should display for SKUs that use this serial number set. Your choices are as follows:

- Hardware Fingerprint
- (Custom Prompt)

Notes

- While you can customize the prompt, the required input is always Hardware Fingerprint.
- When appropriate, online help will be available to show your customers how to locate the Hardware Fingerprint.
- Integrated eSellers do not prompt for Hardware Fingerprint. Instead, the applications must use a special parameter (extraData) to pass the fingerprint to the eSellerate servers during an API call to Purchase or CheckForUpdate. For more information about these API functions and the extraData parameter, see Chapter 2 of the eSellerate SDK Reference.

6. The **Custom Prompt** field appears only when you select the "(Custom Prompt)" option in the Prompt For list. Text that you enter here (up to 50 characters) will define the prompt displayed to your customers. For example, if you enter "Hardware fingerprint of the computer using this software" in the Custom Prompt field, your web store will display "**Hardware fingerprint of the computer using this software:** [input field]" when that information is required for a SKU purchase.
7. The "Extra Info" option enables you to store extra information in the key for use by your program. To use this option, enter a number of up to 10 digits in the **Extra Info** field. (The number of digits supported depends on the Armadillo version and whether keys are signed or unsigned.) Your program can retrieve this information through the EXTRAINFO or EXTRAINFOBITS Armadillo environment strings.
8. The "Expiration" option applies if you use one of Armadillo's expiration options to limit usage of the registered software, and the expiration value is to be stored in the key. You can enter whole numbers up to five digits in the **Expiration** field. Depending on the expiration option set in your Armadillo project, your entry could be one of the following:
   - Fixed date in Armadillo date format (the number of days since Jan. 1, 1999)
   - Number of allowed days
   - Number of allowed launches
   - Version limit (version XX.xx multiplied by 100)

   The Expiration field can be left blank.
9. The "Use Relative Date" option can only be used in conjunction with a fixed expiration date. If you select the **Use Relative Date** check box, the value in the Expiration field will be added to the key generation date and stored in Armadillo date format. For instance, if the value in the Expiration field is 10 and the key generation date is Jan. 1, 2010, the key will be valid through January 11, 2010.

   Two advantages of this option are:
   - You simply enter the days from key generation date to expiration, and eSellerate will automatically compute the date in Armadillo format.
   - By dynamically setting the expiration date, you prevent issuing keys that are already expired.
10. The "Use Network Licensing" option applies if you use Armadillo's Network Licensing option, and the number of copies to allow is to be stored in the key. If you select the **Use Network Licensing** check box, the purchase quantity will be stored in the key. (Multiple quantity sales require a special setting at the SKU level. See "Setting the SKU's Advanced Properties (Optional)" on page 49.)
11. When you are done setting up the Armadillo serial number set, click **Save Changes**.

RPN

With this option, eSellerate generates serial numbers by using an RPN (Reverse Polish Notation) algorithm that you specify.

To create an RPN serial number set:

1. From the **Ready-to-Use Type** list, select **RPN**.
2. In the **RPN Expression** field, enter a legal RPN expression.
3. You can use prompts to base your serial number generation on customer input. If you enable this feature, your eSellerate web stores (regular or embedded) will prompt customers to enter specific information as part of the purchase process.

   From the **Prompt For** list, select the information your web stores should require for SKUs that use this serial number set. Your choices are as follows:

   - None
   - RegCode
   - Palm OS® HotSync Name
   - Pocket PC Owner Name
   - (Custom Prompt)

   Note: When appropriate, online help will be available to show your customers how to locate handheld device information such as RegCode.
4. The **Custom Prompt** text field appears/applies only when you select the "(Custom Prompt)" option in the Prompt For list. Text that you enter here (up to 50 characters) will define the prompt displayed to your customers. For example, if you enter "Nickname" in the Custom Prompt field, your web store will display "**Nickname:** [input field]" when that information is required for a SKU purchase.
5. Click **Save Changes**.

Custom

If you already have a serial number generation scheme, we may be able to run your code on the eSellerate servers. In this case, you can use any of the fields provided in the serial number set to pass additional information to your code.

To arrange the use of this option, please contact your eSellerate account executive.

Information on how to use the available settings for Custom serial numbers follows.

To create a Custom serial number set:

1. From the **Ready-to-Use Type** list, select **Custom**.
2. In the **Parameters** field, you can enter information for eSellerate to use in generating your serial numbers.
3. Your serial number generation can be based on any of the following:

- None
- The customer's first and last name
- The company name
- Some special data (Prompted Data) that the customer is required to enter

Make your selection from the **Based On** list.

4. With the Prompted Data feature, you can use prompts to base your serial number generation on customer input. If you enable this feature, your eSellerate web stores (regular and embedded) will prompt customers to enter specific information as part of the purchase process.

   From the **Prompt For** list, select the information your web stores should require for SKUs that use this serial number set. Your choices are as follows:

   - None
   - RegCode
   - Palm OS® HotSync Name
   - Pocket PC Owner Name (Custom Prompt)

   > **Note:** When appropriate, online help will be available to show your customers how to locate handheld device information such as RegCode.

5. The **Custom Prompt** field appears/applies only when you select the "(Custom Prompt)" option in the Prompt For list. Text that you enter here (up to 50 characters) will define the prompt displayed to your customers. For example, if you enter "Nickname" in the Custom Prompt field, your web store will display "**Nickname:** [input field]" when that information is required for a SKU purchase.
6. Click **Save Changes**.

External

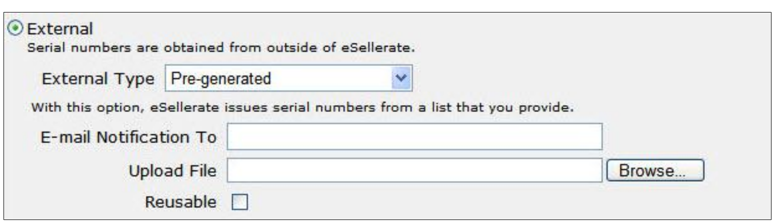
External serial numbers are obtained from outside of eSellerate.

Your choices for External serial numbers are:

- "Pre-generated" below
- "Publisher E-Mailed" on page 86
- "Remote URL" on page 86
- "Application Supplied" on page 88

Pre-generated

With this option, eSellerate issues serial numbers from a list that you provide.



To create a Pre-generated serial number set:

1. From the **External Type** list, select **Pre-generated**.
2. When your list is running low, we will notify you via e-mail. (The exception is if you select the Reusable check box, which disables the notification feature.) If you want us to send the notification to the

primary contact for your account, leave the **E-mail Notification To** field blank. Otherwise, to specify one or more recipient e-mail addresses that we should use instead of the primary contact's address, complete the **E-mail Notification To** field. (There is a 50-character limit.) Use commas to separate multiple addresses.

3. Use the **Browse** button to select a return-delimited text file of your serial numbers. We will issue serial number for your products from this list.

   Note: Your upload must be a plain text file. The allowable characters are numbers, letters, line feeds, carriage returns, spaces and the following special ASCII characters: ! " # $ % & ' ( ) * + , - . / : ; < > ? @ [\ ] ^ _ ` { | } ~

   The text file should contain at least 500 serial numbers. You should upload more than 500 if you plan to use the serial numbers with SKUs that have "Issue serial numbers in ratio to quantity" enabled.

   eSellerate does not check for duplicates in pre-generated serial number lists. If you upload duplicate lists or duplicate serial numbers within your lists, we may issue the same serial number more than once.

   Plain text files created with Apple's TextEdit application are not usable for uploading serial numbers to eSellerate. For that reason, we recommend using other text editors to create your uploads.

   Note: For preview mode testing involving this serial number set, eSellerate will always issue the same pre-generated serial number (typically the first one in the uploaded list).

4. If you want us to reuse your serial numbers, select the **Reusable** check box, and leave the **E-mail Notification To** field blank.

   Note: When a pre-generated serial number set runs out, we will reuse the serial numbers to allow sales to continue uninterrupted. This is true even if you have not selected the Reusable check box.

5. Click **Save Changes**.

Notes on the "<x> serial numbers are available" count

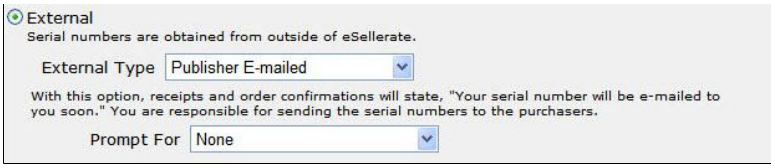
After you upload and save a list of pre-generated serial numbers, "<x> serial numbers are available" will appear to the right of the Reusable check box. Information on how eSellerate counts available serial numbers follows.

To ensure fast and reliable online purchasing, the eSellerate system consists of a number of redundant servers, or "stores." When you upload serial numbers to eSellerate through the Pre-generated serial number option, a portion of those numbers are distributed equally among the various stores. This reduces the available serial number count even before any numbers have been issued. Therefore, it's important to note the following:

- The Serial Number Set Detail page will often show fewer available serial numbers than you expected. The number listed is actually the number of serial numbers that have not yet been distributed to a store.
- Soon after uploading your serial numbers, you may receive e-mail notification that the list is running low. (Notification is optional.) To avoid receiving this notice unnecessarily, we recommend that you upload at least 500 serial numbers with each new serial number list. You should upload more than 500 if you plan to use the serial numbers with SKUs that have "Issue serial numbers in ratio to quantity" enabled.

Publisher E-Mailed

With this option, receipts and order confirmations will tell the purchasers that their serial numbers will be e-mailed to them soon. You are responsible for sending the serial numbers to the purchasers.



The complete statement used in receipts and order confirmations is as follows: "CompanyName (E-mail Address) will e-mail your serial number to you soon." To fill in the company name and e-mail address, eSellerate uses the receipt information that is set up for your account. This will be your Default Receipt Information except in cases when you have overridden it with eSeller Receipt Information. (See "Entering Default Receipt Information" on page 155.)

There are numerous eSellerate resources available for tracking orders that require you to send a serial number. Some examples are online sales reports and automated e-mail reports.

Information on how to use the available settings for Publisher E-mailed serial numbers follows.

To create a Publisher E-mailed serial number set:

1. From the **External Type** list, select **Publisher E-mailed**.
2. You can use prompts to gather customer input, which you will then be able to access through various eSellerate reports. If you enable this feature, your eSellerate web stores (regular and embedded) will prompt customers to enter specific information as part of the purchase process.

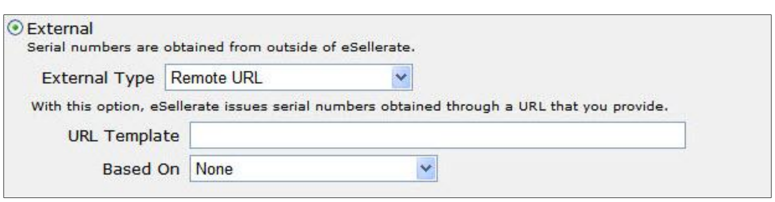
   From the **Prompt For** list, select the information your web stores should require for SKUs that use this serial number set. Your choices are as follows:

   - None
   - RegCode
   - Palm OS® HotSync Name
   - Pocket PC Owner Name
   - (Custom Prompt)

   Note: When appropriate, online help will be available to show your customers how to locate handheld device information such as RegCode.
3. The **Custom Prompt** field appears/applies only when you select the "(Custom Prompt)" option in the Prompt For list. Text that you enter here (up to 50 characters) will define the prompt displayed to your customers. For example, if you enter "Nickname" in the Custom Prompt field, your web store will display "**Nickname:** [input field]" when that information is required for a SKU purchase.
4. Click **Save Changes**.

Remote URL

With this option, eSellerate issues serial numbers obtained through a URL that you provide.



Notes

- This option requires you to host your own serial number generation code on a server.
- The server hosting the code must be available at all times, and responsive enough to handle requests from eSellerate in a timely manner.
- If eSellerate requests a serial number through your URL and the response is delayed, the process may time out.
- There is a 255-character limit for Remote URL serial numbers.
- If you are interested in using this option, please contact eSellerate Support at support@esellerate.net. Our support team can tell you more about the requirements of this option, and help you determine if it suits your needs.

Information on how to use the available settings for Remote URL serial numbers follows.

To create a Remote URL serial number set:

1. From the **External Type** list, select **Remote URL**.
2. In the **URL Template** field, enter the URL that eSellerate should use to obtain your serial numbers. You can include parameters such as <OrderID> to specify order information that you want eSellerate to send through the URL, as in the following example:

   http://www.mysiteaddress1.com/mycode.php?myattr1=<OrderID>
3. Your serial number generation can be based on any of the following:
   - None
   - The customer's first and last name
   - The company name
   - Some special data (Prompted Data) that the customer is required to enter

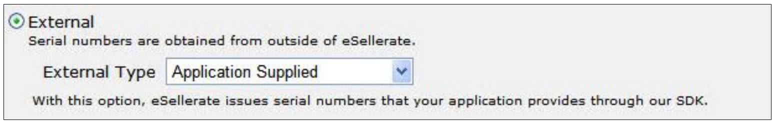
   Make your selection from the **Based On** list.
4. With the Prompted Data feature, you can use prompts to base your serial number generation on customer input. If you enable this feature, your eSellerate web stores (standard and embedded) will prompt customers to enter specific information as part of the purchase process.

   From the **Prompt For** list, select the information your web stores should require for SKUs that use this serial number set. Your choices are as follows:
   - None
   - RegCode
   - Palm OS® HotSync Name
   - Pocket PC Owner Name
   - (Custom Prompt)

   Note: When appropriate, online help will be available to show your customers how to locate handheld device information such as RegCode.
5. This text field appears/applies only when you select the "(Custom Prompt)" option in the Prompt For list. Text that you enter here (up to 50 characters) will define the prompt displayed to your customers. For example, if you enter "Nickname" in the Custom Prompt field, your web store will display "**Nickname:** [input field]" when that information is required for a SKU purchase.
6. Click **Save Changes**.

Application Supplied

With this option, eSellerate issues serial numbers that your application provides through our SDK.



During an API call to Purchase or CheckForUpdate, your application will need to use a special parameter (extraData) to pass a serial number to the eSellerate servers. This may be any type of serial number you choose, as long as it's packaged as a single string.

For more information about these API functions and the extraData parameter, see the eSellerate SDK Reference.

To create an Application Supplied serial number set:

1. From the **External Type** list, select **Application Supplied**.
2. Click **Save Changes**.

Note: This type of serial number set is not available to Web Store eSellers.

Manually Generating Serial Numbers

The eSellerate system offers three primary ways to issue serial numbers for the software you sell:

- Serial numbers can be automatically issued at the time that your products are purchased through eSellerate.
- Serial numbers can be deferred at the time of purchase and issued later through eSellerate After-Purchase Services (http://store.esellerate.net/support). The option to defer serial numbers ("Issue serial numbers after purchase") is set at the SKU level. See "Setting the SKU's Advanced Properties (Optional)" on page 49.
- For products purchased through non-eSellerate sales channels, you can manually generate the serial numbers and then provide them to your customers. Information on that process follows.

Notes

- Manual serial number generation is available for Standard and Standard Enhanced serial numbers only.
    - This feature is not available for serial number sets that have a delivery method of License File or Serial Number & License File.
- You can manually generate serial numbers one at a time, or in bulk.
- There is a fee for using eSellerate Product Activation with a serial number that was issued for a non-eSellerate order. This fee applies to manually generated serial numbers, and to serial numbers imported to eSellerate for activation purposes. For fee information, see "Importing External Serial Numbers for Activation" on page 98.
- If you use Product Activation with manually generated serial numbers, you should not import those serial numbers through the interface on the Product Activation Sets page. The act of generating the serial numbers makes them known to the eSellerate system, so there is no need for a separate import process.

See "Generating One Serial Number" on the facing page and "Generating Multiple Serial Numbers" on page 90.

Generating One Serial Number

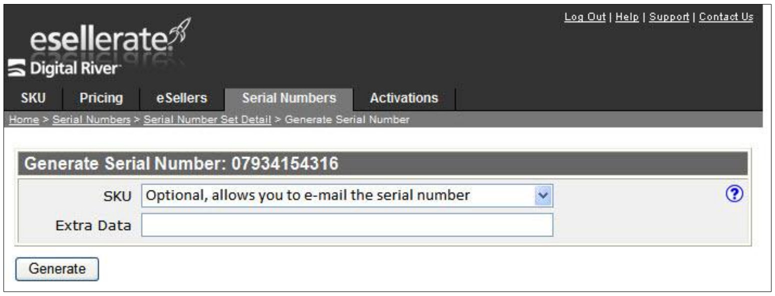
When you manually generate a serial number, you will have the option to select a SKU. If you select a SKU, a built-in feature will allow you to e-mail the generated serial number to your customer. If you don't select a SKU, you can copy the generated serial number and provide it to your customer any way you choose. Descriptions of the two methods follow.

E-mail Method

Note: Before you can use this method, you will need to assign the serial number set to each SKU that requires a serial number. To learn how to assign serial number sets to SKUs, see "Creating the SKU and Setting Its Basic Properties" on page 43.

To manually generate a serial number:

1. Select an existing Standard or Standard Enhanced serial number set and then click **Edit**. The Serial Number Set Detail page appears.
2. Click **Generate Serial Number**. The Generate Serial Number page appears.



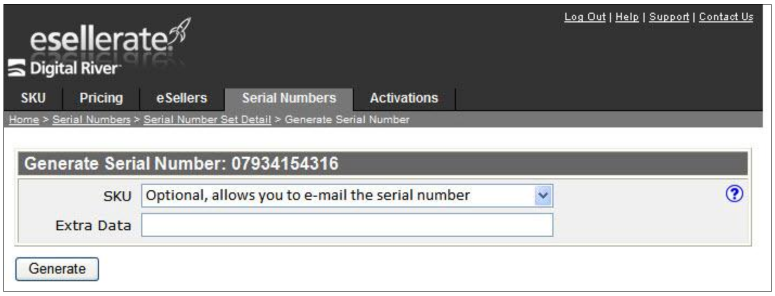
3. Click the **SKU** list to select the SKU that requires a serial number.
4. Complete the **Registration Name** field, if present. This field will display only if you made a **Based On** selection, available at the Serial Number Set Detail level.
5. In the **Extra Data** field, enter additional information to be used in generating this serial number (optional). This is equivalent to your application using a special parameter (extraData) to pass additional information to the eSellerate servers during an API call to Purchase or CheckForUpdate. (For more information about these API functions and the extraData parameter, see the eSellerate SDK Reference.)
6. Enter a number in the **Quantity** field, if present. This field will appear only if you selected the **Use Quantity** check box, available at the Serial Number Set Detail level.
7. Click **Generate**. The new serial number appears.
8. Click the letter graphic. This launches your default e-mail client and opens a new message with the Subject and message fields filled in.
9. Send your message.

Copy Method

To manually generate a serial number:

1. Select an existing Standard or Standard Enhanced serial number set and then click **Edit**. The Serial Number Set Detail page appears.

2. Click **Generate Serial Number**. The Generate Serial Number page appears.



3. Complete the **Registration Name** field, if present. This field will display only if you made a **Based On** selection, available at the Serial Number Set Detail level.
4. In the **Extra Data** field, enter additional information to be used in generating this serial number (optional). This is equivalent to your application using a special parameter (extraData) to pass additional information to the eSellerate servers during an API call to Purchase or CheckForUpdate. (For more information about these API functions and the extraData parameter, see the eSellerate SDK Reference.)
5. Enter a number in the **Quantity** field, if present. This field will appear only if you selected the **Use Quantity** check box, available at the Serial Number Set Detail level.
6. Click **Generate**. The new serial number appears.
7. Copy the serial number, which you can then provide to your customer any way you choose.

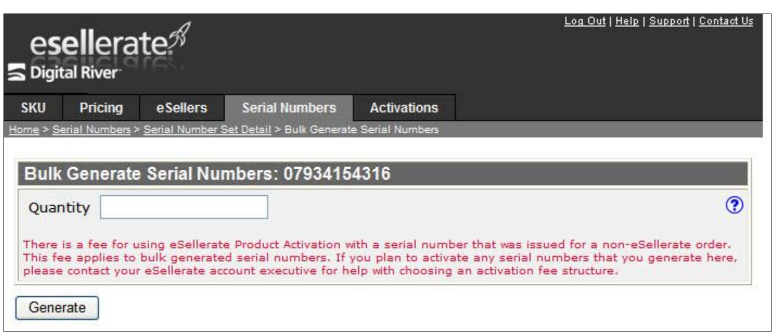
Generating Multiple Serial Numbers

Note: See "Manually Generating Serial Numbers" on page 88 for important notes on using this feature.

Note: To allow for bulk generation, serial number sets must have a "based on" value of None. Also, bulk generation does not use the "duration" value from the serial number set, so the serial numbers never expire.

To manually generate multiple serial numbers:

1. Select an existing Standard or Standard Enhanced serial number set and click **Edit**. The Serial Number Set Detail page appears.
2. Click **Bulk Generate Serial Numbers**. The Bulk Generate Serial Numbers page appears.



3. In the **Quantity** field, enter the number of serial numbers that you want to generate. The largest number allowed is 10000.
4. Click **Generate**. A File Download dialog appears.
5. Save the serial numbers text file.

AquaticPrime License Files

This option for Standard Enhanced serial number sets provides the means to generate license files for use with the AquaticPrime framework. You can learn about AquaticPrime license files at http://www.aquaticmac.com/.

Notes on License Files

- License file functionality is available for Web Store and Embedded Web Store eSellers only.
- If you set up this option for your serial number set, order receipts and confirmation e-mails will provide a link to allow the customer to download a license file. How your customers use their license files is up to you. If you need to provide instructions for the license file, one way to do that is with the Order E-mail and Receipt Text feature, which is available in the SKU's Advanced tab.
- The download links for license files will be nonfunctional in the following scenarios:
  - While the serial number for the associated SKU is blacklisted (which can be undone)
  - When the associated SKU has been returned, or the order has been voided
- License file names can be variable to include information such as order ID and serial number. The default file extension is .plist, which you can change to any other extension if needed.
- Generated license files always include a signature, and can optionally include a number of additional items such as date, quantity and registration name. Along with the variable items, there is a Static Data option that you can use to include select data in every license file.
- If you need to mimic your client AquaticPrime generation and verification, you can paste existing key pairs into the serial number editor for use in the generated license files.
- Order receipts and confirmation e-mails can include or exclude the generated serial number, depending on your settings.
- You can use license files in conjunction with the "Issue serial numbers in ratio to quantity" SKU setting.
- Deferred, bulk generated and manually generated serial numbers do not work in conjunction with license files, so these features are disabled when license files are enabled.
- Two eSellerate variables were added for license files. The new variables can only be used on the receipt page. Their names and descriptions follow:
  - _OrderItem_SNItem.LicenseFileURL – URL to the license file generated for the referenced SKU
  - _OrderItem_BundleItem_SNItem.LicenseFileURL – URL to the license file generated for the referenced child SKU
- This update involved changes to the Receipt.html file in Custom Layouts. The easiest way to update Custom Layouts for these changes is to create a new layout of the same type as your existing one, download Receipt.htm and then upload the file to the existing layout. Otherwise, if you need to manually edit the receipt page, the steps are as follows:

1. Create a new Custom Layout of the same type as your existing layout.
2. In the new layout, open Receipt.htm.
3. Locate this line:

   <!-- Checks to see if a OS Platform is assigned to this product. If there is, it will be displayed. -->
4. Locate this line:

   <!------ Multi SN ------> (immediately followed by <!-- Show APS Link if deferred -->)
5. Copy everything between the lines noted in steps 3 and 4.
6. In the layout needing updated, open Receipt.htm.
7. Use the copied text to replace everything between the lines noted in steps 3 and 4.

8. Save your changes.
9. Go back to the new layout and open Receipt.htm.
10. Copy everything between the two <!------ Bundle Multi SN ------> lines.
11. In the layout needing updated, open Receipt.htm.
12. Use the copied text to replace everything between the two <!------ Bundle Multi SN ------> lines.
13. Save your changes.
14. Inspect, test and publish your layout.

See Also

"Standard Enhanced" on page 76

Setting Up Product Activation

eSellerate Product Activation is an option for protecting your software against casual software piracy. It allows you to limit the number of times a copy of your software can be activated—or made functional through serial number registration—on different computers.

Notes on Product Activation

- You define activation limits through Product Activation sets.
- The eSellerate Product Activation API requires use of the Product Activation Set ID, as found on the Product Activation Set Detail page.
- You can deploy Product Activation Set IDs broadly—such as having one serial number activate a whole suite of products—or narrowly—such as forcing reactivation when updating to a newer version of an activated product.
- Serial numbers used in Product Activation must be unique. Be sure to keep this restriction in mind when you choose serial number sets for activation purposes.
- Product Activation associates a serial number with the unique hardware identification of the computer in use. After the initial activation, subsequent activations from the same computer will not increase the activation count for the serial number (provided there are no major changes to the hardware configuration). This behavior makes it possible for a product to reactivate/verify activation on a regular basis, without affecting the activation count.
- When creating Product Activation sets, you may want to allow enough activations to accommodate users who frequently purchase new computers or make major changes to their hardware configurations.
- Once you return a product, eSellerate will deny future activation attempts for that product.
- You may test Product Activation with eSellers running in preview mode.
- Privacy information for eSellerate Product Activation is available at https://publishers.esellerate.net/activation_policy.asp. You can include this URL in your privacy statement and other places where privacy information may be appropriate.
- Important information for Mach-O developers is available at "Mach-O applications: protecting" in the eSellerate SDK Reference index.

Overview

Setting up Product Activation involves the following steps:

- "Creating Product Activation Sets" below
- "Configuring Your Software for Activation" on page 95
- "Other Options for Activation" on page 96

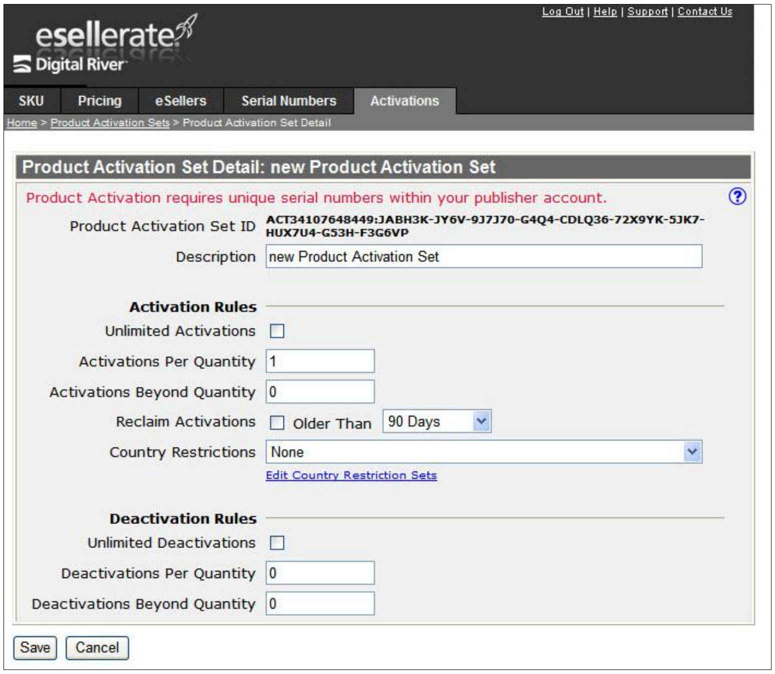
Note: You should never use more than one browser window to manage your account in the eSellerate Sales Manager. Any editing that you do in multiple windows can cause data to be lost.

Creating Product Activation Sets

For an overview of Product Activation, see "Setting Up Product Activation" above.

To create a Product Activation set:

1. Click the **Product Activation** tab. The Product Activation Sets page appears.
2. Click **New**. The Product Activation Set Detail page appears.



3. In the **Description** field, enter a description for this Product Activation set. This is a good place to note important details, such as "Used with Product X version 3.2, Q4 2009." The description is for internal identification only, and will not be visible to your customers.
4. Leave the **Unlimited Activations** check box cleared at this point. See "Other Options for Activation" on page 96 for details.
5. The **Activations Per Quantity** field is for specifying the number of activations to allow for each product purchased. For example, if five copies of Product X are purchased and the Activations Per Quantity is 1, each product is allowed one activation (plus any additional activations that you specify, as described below). You can enter a number here (whole numbers or decimals), or you can accept the default value of 1.
6. In the **Activations Beyond Quantity** field, enter the number of activations to allow beyond the quantity purchased (whole numbers only). If you accept the default value of 0, each product purchased will be allowed exactly the number of activations specified in the Activations Per Quantity field. Any value other than 0 will extend the activations. For example, assume that you enter 2 here and the Activations Per Quantity is 4. When a customer purchases two copies of Product X (which uses this activation set), the total number of activations allowed is: Quantity Purchased (2) x Activations Per Quantity (4) + Activations Beyond Quantity (2) = 10.
7. Leave the **Reclaim Activations** check box cleared at this point. See "Other Options for Activation" on page 96 for details.
8. The "Country Restrictions" option is for restricting customers in certain countries from activating your product. If an activation fails due to country restrictions, the SDK will return an error that indicates eSellerate denied the activation request.

   To use this option, make a selection from the **Country Restrictions** list.

   If you need to edit or create a country restriction set before you make your selection, click **Save**, and then click **Edit Country Restriction Sets**.

9. To allow unlimited deactivations through the DeactivateSerialNumber API, select the **Unlimited Deactivations** check box.
10. The **Deactivations Per Quantity** field is for specifying the number of deactivations (successful calls to the DeactivateSerialNumber API) to allow for each product purchased. For example, if five copies of Product X are purchased and the Deactivations Per Quantity is 1, each product is allowed one deactivation (plus any additional deactivations that you specify, as described below). You can enter a number here (whole numbers or decimals), or you can accept the default value of 1.
11. In the **Deactivations Beyond Quantity** field, enter the number of deactivations to allow beyond the quantity purchased (whole numbers only). If you accept the default value of 0, each product purchased will be allowed exactly the number of deactivations specified in the Deactivations Per Quantity field. Any value other than 0 will extend the deactivations. For example, assume that you enter 2 here and the Deactivations Per Quantity is 4. When a customer purchases two copies of Product X (which uses this activation set), the total number of deactivations allowed is: Quantity Purchased (2) x Deactivations Per Quantity (4) + Deactivations Beyond Quantity (2) = 10.
12. Click **Save Changes**.

Note: If you use country restrictions with your Product Activation sets (see the preceding step 8), we recommend using the same country restrictions for the SKUs that you plan to activate. Doing so can prevent scenarios in which customers are able to purchase a product, but are unable to use the product because of country restrictions on the activation. For information on assigning country restrictions at the SKU level, see "Setting the SKU's Advanced Properties (Optional)" on page 49.

Note: The deactivation rules for a Product Activation set (see the preceding steps 9-11) apply only to deactivations made through the DeactivateSerialNumber API. These rules do not apply to deactivations that you can perform from the Activation Details page, which are unrestricted.

Configuring Your Software for Activation

For an overview of Product Activation, see "Setting Up Product Activation" on page 93.

After you create a Product Activation set, the next step is to configure your application source code to support activation. This requires use of eSellerate SDK or eSellerate Embedded Web Store SDK functions that can reference the Product Activation Set ID, which are as follows:

- **Purchase, CheckForUpdate and Reinstall** (Reinstall is an eSellerate SDK function only) – To initiate new activations, you can pass the Product Activation Set ID in the activationID parameter of these API calls.
- **ActivateSerialNumber** – To activate a product without using one of the above API calls, you can use an API call to ActivateSerialNumber. This approach can be used to activate a product purchased through a web store, for example, or to reactivate/verify activation on a regular basis.
- **ManualActivateSerialNumber** – To enable activation when the computer's configuration prevents the eSellerate Engine or the eSellerate Embedded Web Store Engine from accessing the eSellerate servers, you can use an API call to ManualActivateSerialNumber. This will bring up a wizard and allow the user to manually activate the software using a web browser on the current computer or another computer with web access.
- **ValidateActivation** – To locally determine if a previous activation exists on the computer, or if the computer has been significantly changed since a previous activation, you can use an API call to ValidateActivation.
- **DateActivation** – To retrieve the date of the last activation, you can use an API call to DateActivation. This call performs the same validation as ValidateActivation, and also returns the activation date for purposes such as reactivating/verifying activation (with ActivateSerialNumber) on a regular basis.
- **DeactivateSerialNumber** – To allow your customers to deactivate products for purposes such as moving software to a new computer, you can use an API call to DeactivateSerialNumber. A

successful deactivation will clear the local activation data, and free up an activation for the Product Activation set on the eSellerate servers.

Example uses of Product Activation

- For software purchased through an Integrated eSeller or an Embedded Web Store eSeller, the eSeller passes the activationID in the Purchase function. Product Activation occurs immediately after the purchase concludes (barring any configuration errors, such as a duplicate serial number).
- For software purchased through a web store, the customer enters the serial number after the purchase. In response, the application calls ValidateActivation to check the computer for previous activations with that serial number. If none exist, the application calls ActivateSerialNumber and contacts the eSellerate servers. If the ActivateSerialNumber function returns success, Product Activation occurs.
- At launch, an application calls ValidateActivation to validate the information stored locally on the computer, if present. If the validation fails, the application prompts the user to reactivate the product.
- A customer who wants to move activated software to a new computer selects a "Deactivate" option within the application on the current computer. In response, the application calls DeactivateSerialNumber to clear the local activation data, if present, and to free up an activation on the eSellerate servers. The customer then activates the software on the new computer.

Note: This note applies to Embedded Web Store eSellers only. If you use Product Activation in conjunction with the up-sell feature, all SKUs that you offer in a given up-sell opportunity should use the same Product Activation Set ID. This is because the Product Activation Set ID that your eSeller passes for Purchase or CheckForUpdate API calls is the one eSellerate uses for activation, even if the customer ends up purchasing an up-sell SKU instead of the original selection. By coding related eSellers to pass the same Product Activation Set ID, you can avoid problems with validating activations after an up-sell purchase.

Note: In cross-sell purchases, Integrated eSellers can activate the primary SKU only. The cross-sell SKUs will each need to use their own serial numbers, and be configured to handle Product Activation through some function other than Purchase.

For more information about these API functions, see the eSellerate SDK Reference.

See Also

"Manually Activating Serial Numbers" on page 100

Other Options for Activation

For an overview of Product Activation, see "Setting Up Product Activation" on page 93.

The following options are available to you once Product Activation is in use.

Activation Details Page

Options available at the at the Activation Details page (see "Activation Details Page" on page 109) include:

- Monitoring the number of activations on a per-order basis
- Overriding the set activation limits for select orders at your discretion
- Deactivating previous activations
- Blacklisting certain serial numbers to disable all existing and future activation of products using those serial numbers

Product Activation Set Detail Page

Options available at the Product Activation Set Detail page include:

- **Unlimited Activations** – If software that you've deployed fails to activate due to problems in its activation code, you can use the "Unlimited Activations" option to allow activations to resume. With the **Unlimited Activations** check box selected, all software using the Product Activation set will return success, which should allow the products to activate.

  After correcting the activation code, you could deploy revised software that uses a new activation set, and retain the original activation set with Unlimited Activations enabled. The older software versions could then be activated and updated, which would allow you to enforce the activation rules.

  Note: While Unlimited Activations is enabled, none of the set's activations will be stored in activation history.

- **Reclaim Activations** – This option can be useful if your customers frequently exceed the set activation limits due to new computer purchases or major hardware changes. Rather than extend the number of activations beyond the quantity purchased—which allows more total copies of the software to activate—you can reclaim old activations.

  With the **Reclaim Activations** check box selected, eSellerate will be able to reclaim activations from the time period specified by the **Older Than** list. For example, assume that the Product Activation set allows four total activations for each product purchased, and that it will reclaim activations older than 90 days old. Once there are four successful activations for the serial number, eSellerate will handle subsequent activation attempts as follows:

  - If activations older than 90 days exist, eSellerate will deactivate the oldest one and use it to activate the software making the current request.
  - If no activations older than 90 days exist, eSellerate will return an "activation limit exceeded" error.

  Note: When software uses an old activation that has been reclaimed, that product will require a new, unique activation if it attempts to activate again.

Importing External Serial Numbers for Activation

This option extends the piracy protection of eSellerate Product Activation to software sold outside the eSellerate system. It involves importing serial numbers that were issued for non-eSellerate orders, and paying a fee to activate each of those serial numbers. (There is never a fee to activate serial numbers issued for eSellerate orders.)

To get started using this option, do the following:

1. Select a fee structure.
2. Import serial numbers for Product Activation.
3. Activate the imported serial numbers.

Selecting a Fee Structure

There are two fee structures available to suit your individual needs:

- Per-activation – You pay a set fee for each new, unique activation of a given serial number.
- Lifetime – You pay a set fee for unlimited activations of a given serial number.

Notes

- A per-activation fee applies when your software initiates a new, unique activation, which can involve any of the following API calls: Purchase, CheckForUpdate, Reinstall, ActivateSerialNumber and ManualActivateSerialNumber. After your software initiates a new, unique activation of a given serial number, no fee applies for subsequent activations of that serial number on the same computer, unless the machine configuration changes significantly. Also, no fee applies when your software checks the local computer for previous activation information, which typically involves an API call to ValidateActivation.
- The fee structure you choose will also apply to any activations of manually generated serial numbers. See "Manually Generating Serial Numbers" on page 88.

Please contact your eSellerate account executive for help with choosing an activation fee structure.

Importing Serial Numbers for Product Activation

Note: If you use Product Activation with manually generated serial numbers, you should not import those serial numbers through the interface on the Product Activation Sets page. The act of generating the serial numbers makes them known to the eSellerate system, so there is no need for a separate import process.

As explained in "Setting Up Product Activation" on page 93, serial numbers used in Product Activation must be unique.

You will need to save the serial numbers in a comma-delimited file (.csv) or a tab-delimited file (.txt). The required format is as follows:

number<delimiter>quantity
number<delimiter>quantity
number<delimiter>quantity

Quantity refers to the number of products purchased in the non-eSellerate order (that use the given serial number). This value determines the number of activations and deactivations to allow for the serial number based on settings such as "Activations Per Quantity" and "Deactivations Beyond Quantity" in the Product Activation set.

In addition to commas or tabs, you can also use quotation marks as delimiters, but the quotation marks are not required. For example, any of the following formats will work for importing serial numbers:

"number","quantity"
"number"<tab>"quantity"
number,quantity
number<tab>quantity

When you're ready to import serial numbers, go to the External Serial Number Import section of the Product Activation Sets page. Click **Browse** (or **Choose File** if you're using Chrome or Safari) to locate the serial number file. Then click **Import**.

Activating the Imported Serial Numbers

After importing serial numbers to the eSellerate system, you can activate the serial numbers as needed.

See Also

"Configuring Your Software for Activation" on page 95

Manually Activating Serial Numbers

To enable activation when the computer's configuration prevents the eSellerate Engine from accessing the eSellerate servers, you can use an API call to ManualActivateSerialNumber. This will bring up a wizard and allow the user to manually activate the software using a web browser on the current computer or another computer with web access.

The standard ActivateSerialNumber function also provides the option to invoke the Manual Product Activation Wizard in the event that access to the eSellerate servers is unavailable.

For details on these API functions, see the eSellerate SDK Reference.

Activation options screen

Activation options is the first Manual Product Activation Wizard screen to appear. It explains to the user that automatic activation is not an option with the present computer configuration, and provides the following options:

- Activate using a web browser on this computer
- Activate using a different computer that has web access
- I already have an Activation Key and would like to activate now

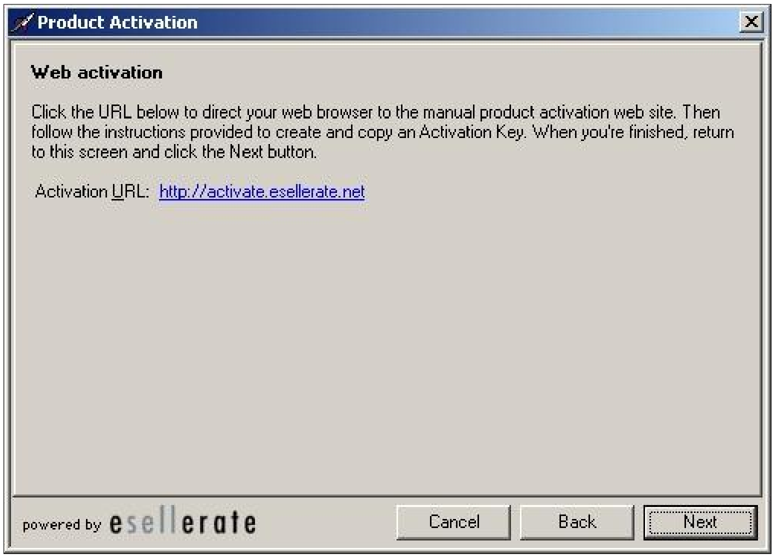
If configured to do so, the wizard will also present a fourth option:

- I do not have any of the above options available to me

Note: You can add a custom preface to the title displayed for all the wizard screens. For example, if you used "My Software," each screen title would be "My Software: Product Activation." See the ManualActivateSerialNumber descriptions for your development environment in the eSellerate SDK Reference.

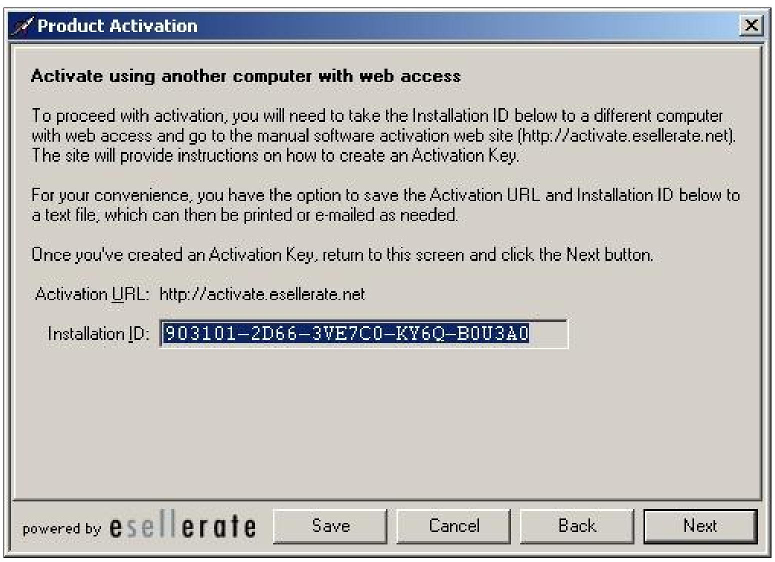
Web activation screen

If the user chooses "Activate using a web browser on this computer," the following screen will explain how to visit the manual product activation web site and create an Activation Key.



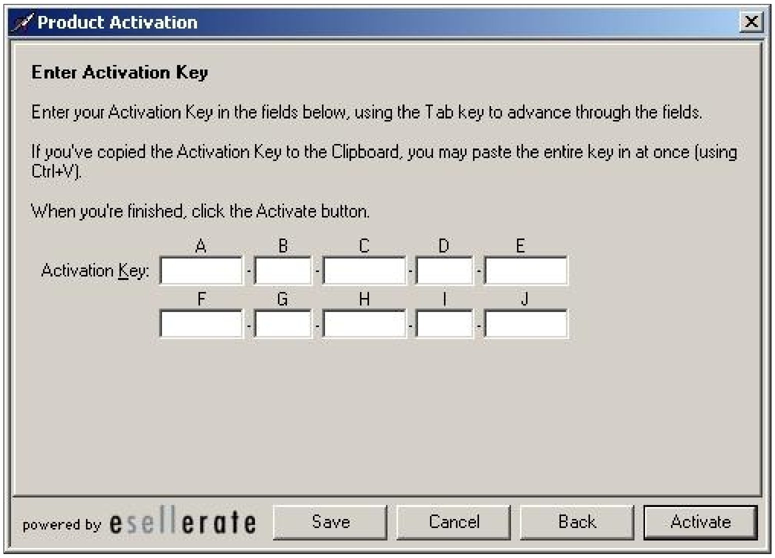
Activate using another computer with web access screen

If the user chooses "Activate using a different computer that has web access," the following screen will explain how to go to another computer with web access and create an Activation Key.



Enter Activation Key screen

If the user chooses "I already have an Activation Key and would like to activate now," the following screen will explain how to enter an Activation Key.



After creating an Activation Key, users can also reach the above screen by returning to one of the web activation screens and clicking Next.

Other activation options screen (optional)

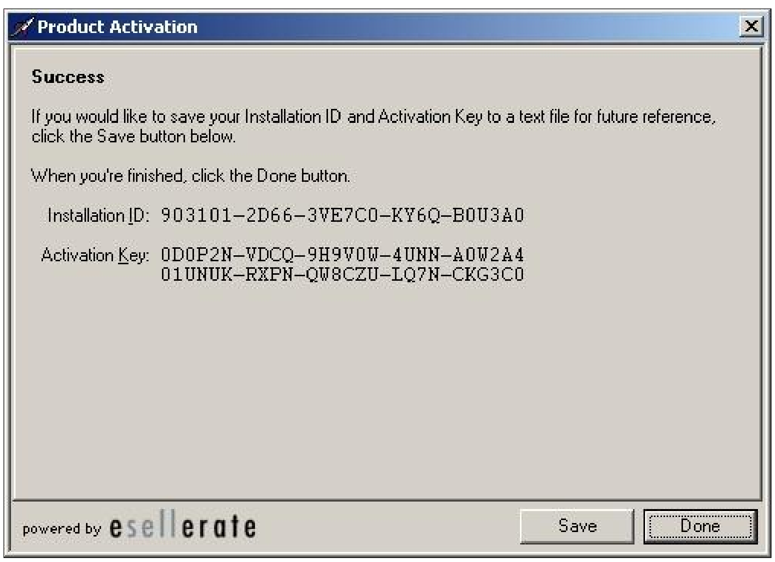
If the user chooses "I do not have any of the above options available to me," the following screen presents custom options that the publisher has defined.

Manual product activation web site

Users can create Activation Keys by visiting the manual product activation web site at http://activate.esellerate.net and following the instructions provided.

Success screen

After entering a valid Activation Key into one of the screens that allows it, the user clicks Activate. If activation is successful, the following screen appears. The user has the option to save the Installation ID and Activation Key to a text file before closing the wizard and using the activated product.



Chapter 4 - Order Management

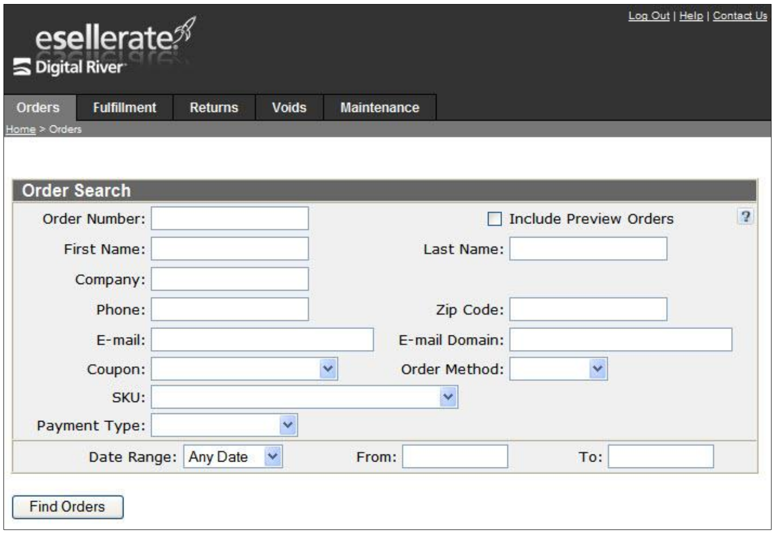
The Order Management section of the eSellerate Sales Manager is for completing the following tasks:

- "Searching for Orders" on next page
- "Fulfilling Orders" on page 112
- "Returning Orders" on page 114
- "Voiding Orders" on page 122
- "Maintaining the XML Order Notice" on page 124

Searching for Orders

To search for orders:

1. Click the **Orders** tab. The Orders page appears.



2. Use any of the text fields and lists to narrow your search.

   Note: There are two ways to use customer e-mail address as the search criterion. To perform "starts with" searches, use the **E-mail** field. For example, the entry "amj" could locate addresses such as amjones@esellerate.net and amjensen@mindvision.com. To search for e-mail domain, use the **E-mail Domain** field. Enter an exact match for the domain, and do not include the "@" character. For example, the entry "esellerate.net" could locate addresses that used that domain.

3. If appropriate, select the **Include Preview Orders** check box.
4. Click **Find Orders**. This will display all orders that matched your search criteria.
5. For more information about an order, click its **Order Number** field.

Note: The information that is available through the Orders search does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

See Also

"Order Detail Page" below

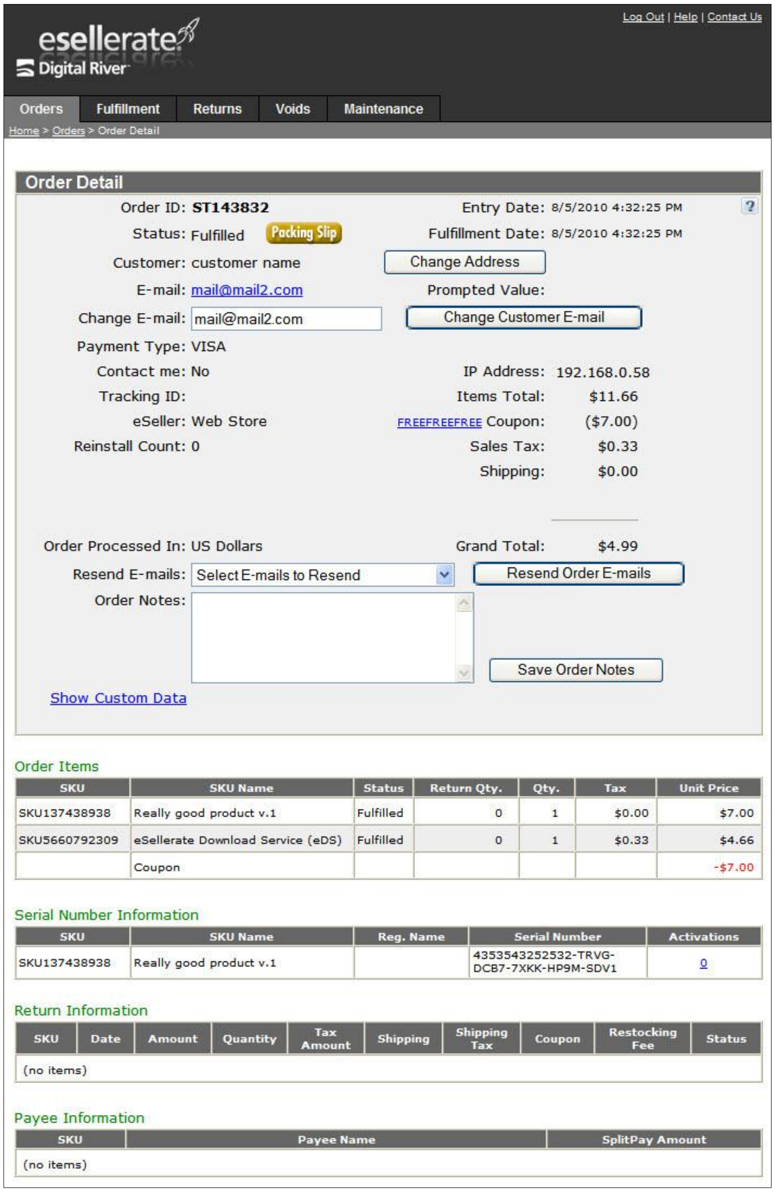
"Activation Details Page" on page 109

Order Detail Page

Note: The information that is available on the Order Detail page does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

The Order Detail page is accessible through a number of links, which include the following:

- All of the Order Management functions (Orders, Fulfillment, Returns and Voids) will return Order Number links in their search results.
- Whenever applicable, eSellerate reports will return Order Number links in their results.



This page lists all significant details for an order in one convenient place. It also provides the following options:

- **Packing Slip** – This button appears for all orders except those that involve voids. Clicking it brings up a printable packing slip for the order. (See also "Printing Packing Slips" on page 113.)
- **Void** – This button appears only when you have reached the Order Detail page from the Voids editor. See "Voiding Orders" on page 122 for more information.
- **Change Address** – Use this button to change the billing address and/or the shipping address for the order (if the order involved shipping). The window that appears will display all address information that applies. Make any needed changes and additions to the information, and then click **Save Changes**.

> **Note:** Serial numbers based on company name will always be based on the original company name entered for the order, regardless of any changes you make to company name within the billing address. (See also "Creating Serial Numbers" on page 74.)

- **E-mail** – To send an e-mail message to the customer, click **E-mail**. A new e-mail message will appear for you to fill out and send.
- **Change Customer E-mail** – To change the customer e-mail record for the order, enter the new e-mail in the **Change E-mail** field and then click **Change Customer E-mail**.

> **Note:** If you change the customer e-mail record, the customer will need to use the new address when searching for the order at the eSellerate After-Purchase Services web page (http://store.esellerate.net/support).

- **Coupon** – If the order involved a coupon, you can click a link to view the coupon's Detail page.
- **Clear Reinstall Limit** – This button appears only if the customer has reinstalled a product purchased in the order. (Directions for reinstalling or re-downloading purchased software are available on the first screen of the eSellerate Software Delivery Wizard, and on the eSellerate After-Purchase Services web page at http://store.esellerate.net/support.)

  To prevent software piracy, eSellerate limits customers to a set number of reinstallations per order. eSellerate calculates an order's reinstall limit by multiplying the quantity purchased (minus any returns) by three. For example, if a customer purchases a quantity of four, the reinstall limit for that order is 4x3, or 12. Customers who reach the reinstall limit and want to request more reinstallations must contact the publisher for assistance. If you need to make adjustments for such an order, you can use the **Clear Reinstall Limit** button to reset the Reinstall Count to 0.

> **Note:** Your web store customers have the option to extend their download capabilities by purchasing eSellerate Download Protection service (eDP). eDP is in effect for the order when the eDP SKU appears under Order Items (with no return quantity) and the Entry Date is within one year of the present date. During the time that eDP is in effect, the Reinstall Count will remain at 0 and the Clear Reinstall Limit option will not apply. Once eDP expires or is returned, the order will be subject to the reinstall limit described here, and you will be able to reset the Reinstall Count to 0 as needed. For information on eDP, see "Presenting the eSellerate Download Protection (eDP) Option to Customers" on page 160.

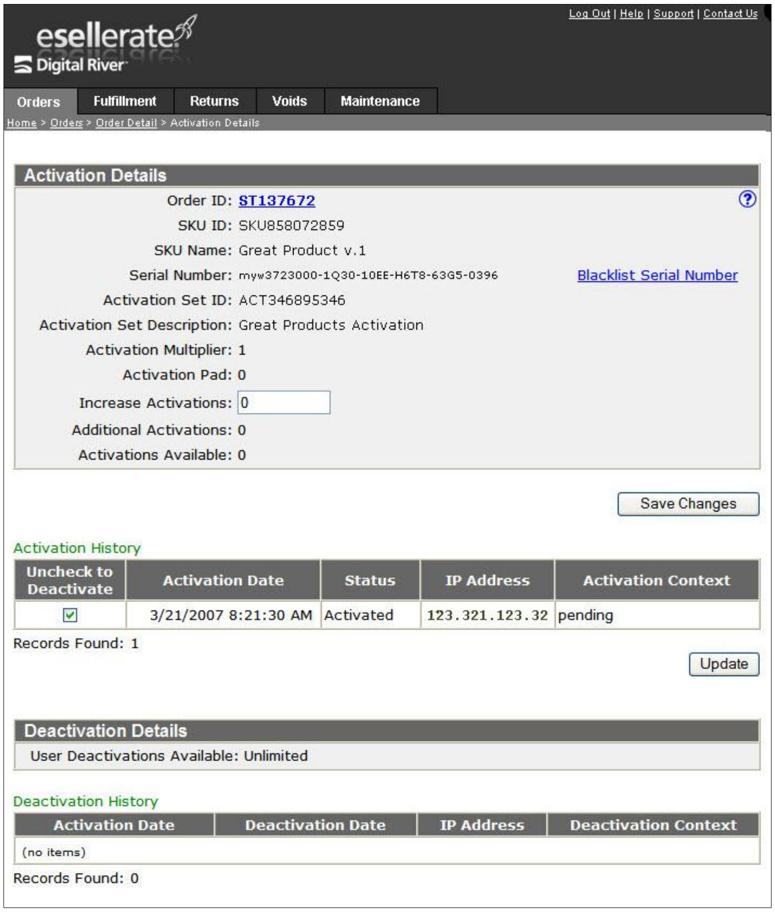
- **Shipping** – If the order involved shipping, you can click a link to view the shipping table's Detail page.
- **Resend Order E-mails** – This option allows you to resend order e-mail messages that the customer may have missed. (If the customer entered an incorrect address when ordering, you will first need to change the address with the "Change Customer E-mail" option.)

  From the **Resend E-mails** list, select the desired e-mail and then click **Resend Order E-mails**.
- **Order Notes** – You can use this text field to enter notes about the order. (There is a 1,000-character limit.) When you're finished, click **Save Order Notes**.
- **Show Custom Data** – If the order involved collecting data and storing it in custom variables (which is an option for Custom Layouts only), clicking **Show Custom Data** will show the values for the variables. For more information on the custom data variables, see "Notes on Using eSellerate Variables" on page 285.
- **Activations** – If the order involved serial numbers, the Order Detail page will include an Activations link for each serial number issued. See "Activation Details Page" on the facing page.
- **Subscription Events Testing – Preview Orders** – If you're viewing a preview order that involved subscriptions, the Order Detail page will provide options for testing subscription events. See "Subscription Events Testing – Preview Orders" on page 110.

Activation Details Page

The Activation Details page is accessible through the following links:

- If an order involves serial numbers, its Order Detail page will include an Activation link for each serial number issued.
- The results of a Serial Number report will include a Serial Number link for each serial number found.



This page provides the following options:

- **Increase Activations** – To increase the activations allowed for the order, enter the desired number in the **Increase Activations** field and then click **Save Changes**.
- **Blacklist Serial Number** – Use this function to disable all existing and future activations of products using the listed serial number. (Clicking **Save Changes** is not required.) You can later undo this blacklisting if needed.

  For serial numbers associated with a license file, the URL for downloading the license file will be non-functional while **Blacklist Serial Number** is enabled.

- **Uncheck to Deactivate** – In the Activation History, you can uncheck any or all activations for the order and then click **Update** to deactivate them. For reactivation, simply reverse the process.

Subscription Events Testing – Preview Orders

If you're viewing a preview order that involved subscriptions, the Order Detail page will provide options for testing subscription events.

Subscription Events Testing - Preview Orders

Event	Normally Occurs	Event Triggers This	Test	Results
Pre-Frequency Billing Notice	7 days before frequency billing	• E-mail to subscriber	Test	
7 Day Renewal Reminder Notice	7 days before expiration	• E-mail to subscriber	Test	
15 Day Renewal Reminder Notice	15 days before expiration	• E-mail to subscriber	Test	
30 Day Renewal Reminder Notice	30 days before expiration	• E-mail to subscriber	Test	
7 Day Expiration Reminder Notice	7 days after expiration	• E-mail to subscriber	Test	
15 Day Expiration Reminder Notice	15 days after expiration	• E-mail to subscriber	Test	
Credit Card Expiration Notice	30 days before credit card expiration date	• E-mail to subscriber	Test	
Billing Failed Notice	If a frequency billing or renewal fails	• E-mail to subscriber	Test	
Subscription Canceled Notice	If the subscription is canceled at the request of the subscriber, the product is returned, or the subscriber failed to act on a Billing Failed Notice or Credit Card Expiration Notice	• E-mail to subscriber • E-mail to publisher	Test	
Frequency Billing	On the specified frequency after the original order	• New child order • XML post for child order	Test	
Renewal	On the specified duration after the original order	• New subscription order • XML post for new subscription order • XML post for original order	Test	
Frequency Billing Failed	If a frequency billing attempt fails to complete	• XML post for original order	Test	
Renewal Failed	If a renewal attempt fails to complete	• XML post for original order	Test	
Subscriber Billing Update	If the subscriber updates billing information through After Purchase Services for a suspended subscription	• XML post for original order	Test	
Subscription Expired	If the expiration date (plus grace period if applicable) is reached and the subscriber has not renewed subscription	• XML post for original order	Test	
Subscription Canceled	Cancellation date is reached after cancellation is requested by the subscriber, or 30 days after a failed billing attempt	• XML post for original order	Test	

About Subscription Events Testing

When you place a preview order involving subscriptions, after-purchase events that may happen in the life of a real subscription—such as frequency billings and XML posts for changes—do not occur. However, you can still test many of these subscription events by using the options on the Order Detail page for preview orders.

To test an event, click its **Test** button. The results will appear in the "Results" column. You can then review the e-mails and XML posts that are created.

Notes

- You can use these tests to see the results of events that normally would occur only after a specified time, or in response to certain subscription changes.
- No actual charges occur for any of these tests.
- E-mails for these tests will go to the address listed for the customer in the top section of the Order Detail page. XML posts will go to the URLs specified for your account in the XML Order Notice section of the Account Information page.
- When the order involves more than one subscription, the tests will apply to the first one listed in the Subscriptions section of the Order Detail page (just above the testing area).
- The "Test" column will show "Not Applicable" for tests that are not available because of the current subscription's configuration or status.

- Tests that involve XML posts (see the "Event Triggers This" column) will change the subscription status when applicable. The "Results" column will show the new status in these instances. To see the status change in the Subscriptions section above the testing area, you will need to refresh/reload the page.

See Also

"Order Detail Page" on page 106

Fulfilling Orders

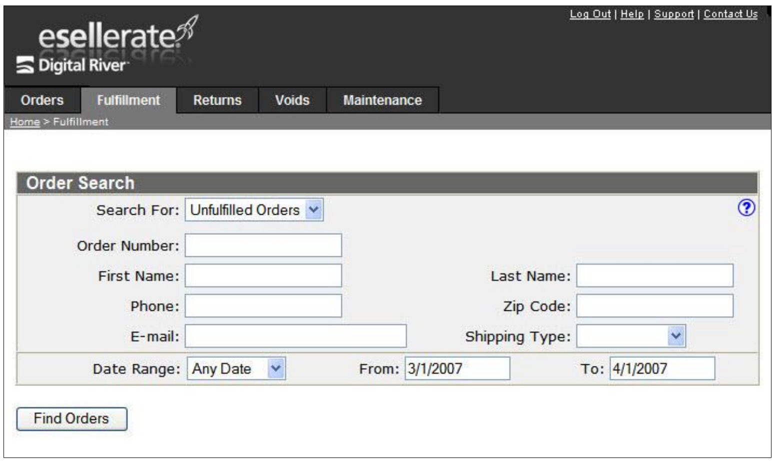
The Fulfillment editor allows you to mark orders as fulfilled after you complete the required shipping. Processing of these orders can then continue in the eSellerate system.

Note: It is recommended that you ship items within three days of receiving a notice of shipping requirements. Due to time limits on credit card authorizations, eSellerate must process the authorizations 1-2 days before they expire, or cancel orders left unfulfilled at that time.

Note: If your account is set up to integrate with Amazon Fulfillment, a search for unfulfilled orders can return orders that are pending fulfillment by Amazon. Normally, these orders are fulfilled automatically, so you do not need to fulfill them yourself. We will notify you if you need to take action on one of these unfulfilled orders. See also "Integrating with Amazon Fulfillment" on page 154.

To mark an order as fulfilled:

1. Click the **Fulfillment** tab. The Fulfillment page appears.



2. In the **Search For** list, use the default selection, **Unfulfilled Orders**.
3. Use any of the other lists and text fields to narrow your search.
4. Click **Find**. This will display all orders that matched your search criteria.

Select	Order Number	Order Date	Customer Name	Shipping Type	Amount
☐	ST17121	3/6/2008	Xyz B. Customer	Overnight	$64.95
☐	ST17164	3/7/2008	Qrs C. Customer	Ground	$86.25
☐	ST17165	3/7/2008	Tuv D. Customer	Saturday	$182.10
☐	ST18042	3/28/2008	Wxy E. Customer	Ground	$64.95
☐	ST18044	3/28/2008	Abc F. Customer	Ground	$86.25
☐	ST18045	3/28/2008	Def G. Customer	Overnight	$64.95
☐	ST18051	3/28/2008	Hij H. Customer	Ground	$160.80
☐	ST18930	6/15/2008	Klm I. Customer	Ground	$64.95
☐	ST18944	6/15/2008	Nop J. Customer	Saturday	$64.95
☐	ST18945	6/15/2008	Qrs K. Customer	Overnight	$86.25

5. Select the unfulfilled order by clicking its **Select** check box. To quickly select all the orders listed, click **Check All**.
6. Click **Mark checked orders as fulfilled**.
7. If applicable, click **Print packing slips** (available on Internet Explorer only).

For each fulfilled order, eSellerate will send a "Your order has shipped" e-mail to the respective customer.

Note: The order information that is available through fulfillment processing does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

See Also

"Printing Packing Slips" below

Printing Packing Slips

The eSellerate system provides several ways to print packing slips for your fulfilled orders:

- On an individual order basis – from the Order Detail page
- On a multiple order basis – from the Fulfillment page (Internet Explorer only)

You can print multiple packing slips at the time you fulfill the orders, or anytime thereafter, as described below.

To print packing slips for previously fulfilled orders:

1. On the Fulfillment page, from the **Search For** list, select **Fulfilled Orders**.
2. Use any of the text fields and/or the **Date Range** list to narrow your search.
3. Click **Find**. This will display all orders that matched your search criteria.
4. Select any fulfilled order by clicking in **Select** check box. To quickly select all orders listed, click **Check All**.
5. Click **Print packing slips**. This will open a new web page containing the packing slips.
6. If you prefer, open your web browser's print preview and disable the printing of headers and footers.
7. Print the packing slips.

Note: One packing slip will print per page. Page 1 will contain a summary of the packing slips you generated.

See Also

"Order Detail Page" on page 106

"Fulfilling Orders" on previous page

Returning Orders

Note: For orders placed prior to August 31, 2010, coupon and shipping amounts will not be specified at the line level in Full Order Returns and Partial Returns/Refunds. Instead, these items will be applied across the entire order, and will appear in the top section of the returns pages. The look and functionality will be the same as returns done prior to when eSellerate expanded the options for returns (in August 2010).

You can use the Returns editor to initiate returns and refunds for everything from entire orders to single line items. There is also an option for refunding arbitrary amounts (Satisfaction Refunds) without returning any quantities from the order.

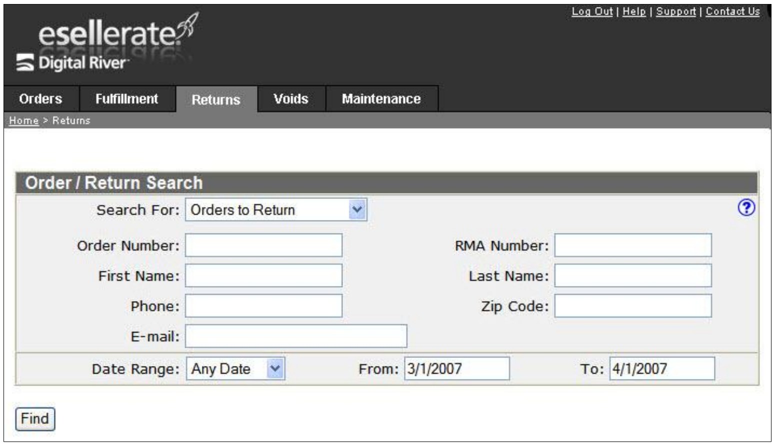
Notes on returns

- For the purposes of these instructions, a return involves returning a quantity, and a refund involves giving funds back to the customer.
- The Returns editor provides a number of different ways to process subscription orders. See "Canceling and Returning Subscriptions" on page 215 for details. Information on how to cancel subscriptions without issuing credits/refunds appears at "Canceling Subscriptions" on page 117.
- Returning a line item also returns any serial number associated with that item. The serial number is then invalid, so that subsequent attempts to activate or confirm it (using ActivateSerialNumber or ConfirmSerialNumber API calls) will fail.
- With a Partial Return/Refund, it is possible to return a line item without canceling its associated subscription. If you do this, be sure to consider that the Partial Return/Refund returns any serial number associated with the item, which may be problematic if you are using the serial number in conjunction with eSellerate Product Activation.
- In general, order items that you do not select when returning an order will remain available for returning/refunding at another time. When you return to the order to process an additional return, there will be figures such as Amount Already Adjusted, Amount Already Refunded and Refundable Unit Amount to indicate which amounts are still available for returning/refunding.
- The $20 USD processing fee that your customers pay for international wire transfers is not refundable.
- Returned coupon discounts apply to all line items. They are prorated across the entire order, and are always returned. (You cannot exclude them from returns.)
- It is possible to charge a restocking fee on a return, and later go back to that order and refund the restocking fee.
- When a return for a purchase order is complete, eSellerate sends the customer a check for the refund amount. A wire refund goes to the account the publisher specifies when completing the return processing. Refunds for the other available payment types go back to the accounts the customers used for the original transactions.
- Orders with purchase order payments can be fulfilled once eSellerate has received the purchase orders and marked the orders as complete, which initiates all the normal order elements such as serial number generation and customer e-mail notifications. However, these orders will not be available for returns until eSellerate has received payment for the purchase orders.

To process a return or refund:

Locate the order

1. Click the **Returns** tab. The Returns page appears.



2. Click the **Search For** list and make a selection. If you are processing a new return, use the default selection, **Orders to Return**. Otherwise, you can choose to search for processed returns, submitted returns or pending returns. (For information on these types of returns, see "Processed versus Submitted versus Pending Returns" on next page.)
3. Use any of the text fields and/or the **Date Range** list to narrow your search.
4. Click **Find**. This will display all orders that matched your search criteria.

Orders Found

Order Number	Date	Customer Name	Order Status
ST11756	9/27/2009	Xyz R. Customer	fulfilled
ST11757	9/27/2009	Abc S. Customer	fulfilled
ST11758	9/27/2009	Lmn T. Customer	fulfilled
ST11759	9/27/2009	Tuv V. Customer	fulfilled

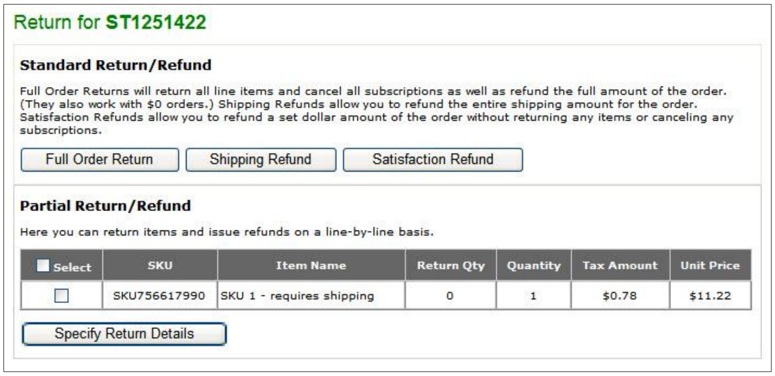
Records Found: 4

5. (Skip this step if the search returned a single order.) Click the order number of the order that you want to return.

Note: The order information that is available through returns processing does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

Select a return or refund type

There are several ways that you can process returns or refunds on an order or individual order items. Depending on the order contents and any returns or refunds that you have previously processed on the order, some of these options may not always be available.



The Standard Return/Refund types are Full Order Return, Shipping Refund and Satisfaction Refund. Full Order Returns will return all line items, cancel all subscriptions and serial numbers and refund the full amount of the order. (They also work with $0 orders.) Shipping Refunds allow you to refund the entire shipping amount for the order. Satisfaction Refunds allow you to refund a set dollar amount of the order without returning any items or canceling any subscriptions.

As an alternative to the Standard Return/Refund types, the Partial Return/Refund is for returning items and issuing refunds on a line-by-line basis.

To select a return or refund type, do one of the following:

- Click **Full Order Return** and follow the instructions provided at "Full Order Returns" on the facing page.
- Click **Shipping Refund** and follow the instructions provided at "Shipping Refunds" on page 118.
- Click **Satisfaction Refund** and follow the instructions provided at "Satisfaction Refunds" on page 118.
- For a Partial Return/Refund, click the **Select** check box for each order item that you want to return. Then click **Specify Return Details**. See "Partial Returns/Refunds" on page 119 for more information.

Processed versus Submitted versus Pending Returns

A return can have one of three statuses:

- **Processed** – A processed return is one that has been credited to the customer account.
- **Submitted** – Most returns for PayPal orders will be processed (Status: Processed) as soon as you click Process The Return. However, if you are returning a credit card or e-check (ACH) order, the return status will be Submitted until processing is complete.
- **Pending** – Returns for international wire orders will have Pending status until the publisher enters the additional information required for those returns, after which time the status will be Submitted until processing is complete.

  Returns for orders with purchase order payments will have Pending status until processing is complete.

  Pending status can also indicate that one of the following conditions delayed processing of your return:

  - An error occurred while crediting the customer account. In this case, the system will periodically retry the credit procedure until it is successful.
  - Your account balance is insufficient to cover the credit specified by the return. The eSellerate team monitors pending returns, and will contact you when appropriate. We will notify you by e-mail when we process a return that was pending due to an insufficient account balance.

Returning International Wire Orders

When you process returns on international wire orders, the return status will change to Pending, and an "Enter Wire Return Information" link will be displayed on the Return Detail page. Clicking that link will bring up the Wire Return page with the fields that are required to finish processing the return. You can leave the Wire Return page (such as after taking a screenshot to send to your customer) and return to it when you have all of the required information.

Canceling Subscriptions

To cancel a subscription without issuing credits/refunds:

1. From the Returns page, click the **Search For** list and select **Subscriptions to Cancel**.
2. Use any of the text fields and/or the **Date Range** list to narrow your search.
3. Click **Find**. This will display all orders that matched your search criteria.
4. (Skip this step if the search returned a single order.) Click the order number of the subscription that you want to cancel.
5. Click the **Select** check box for each subscription that you want to cancel.
6. Click **Cancel Selected Subscriptions**. A confirmation dialog appears.
7. Click **OK**.

Full Order Returns

Note: For orders placed prior to August 31, 2010, coupon and shipping amounts will not be specified at the line level in Full Order Returns and Partial Returns/Refunds. Instead, these items will be applied across the entire order, and will appear in the top section of the returns pages. The look and functionality will be the same as returns done prior to when eSellerate expanded the options for returns (in August 2010).

Full Order Returns will return all line items, cancel all subscriptions and serial numbers and refund the full amount of the order. (They also work with $0 orders.)

This type of return will be unavailable if any return has already been done on the order.

For a Full Order Return, you will need to complete the Verify Return Information page as follows:

- **Return Date** – The return date will use the current date by default. You can change the date if desired.
- **RMA Number** – If the return will use an RMA number, you can enter that number here (optional).
- **Reason for Return** – Click this list to select a return reason. If you need to edit or create a return reason before you make your selection, click the **Edit Return Reasons** icon. When you're finished, you will need to navigate back to the Verify Return Information page.
- **Comment** – Enter a comment (optional).
- **Return E-mail Sender Address** – This field allows you to specify the "From" address for the notification e-mail that eSellerate will send to the customer when you finish processing this return. You can accept the default address, or enter a different one.

When you're ready to proceed (there is no separate verification step with these returns), click **Process The Return**.

Note: If the payment type for the order was international wire, you will have additional steps to complete at this time. See "Returning International Wire Orders" above.

The Return Detail page will display a summary of the return. Be sure to note the Status field, which will indicate one of the following statuses:

- Processed
- Submitted
- Pending

For more information on these statuses, see "Processed versus Submitted versus Pending Returns" on page 116.

Shipping Refunds

Shipping Refunds allow you to refund the entire shipping amount for the order.

Notes

- You can't use this type of refund if the coupon discount for the order was based on free shipping.
- Shipping Refunds will refund any tax that was charged on the shipping line item.

For a Shipping Refund, you will need to complete the Verify Return Information page as follows:

- **Return Date** – The return date will use the current date by default. You can change the date if desired.
- **RMA Number** – If the return will use an RMA number, you can enter that number here (optional).
- **Comment** – Enter a comment (optional).
- **Return E-mail Sender Address** – This field allows you to specify the "From" address for the notification e-mail that eSellerate will send to the customer when you finish processing this return. You can accept the default address, or enter a different one.

When you're ready to proceed (there is no separate verification step with these refunds), click **Process The Return**.

Note: If the payment type for the order was international wire, you will have additional steps to complete at this time. See "Returning International Wire Orders" on previous page.

The Return Detail page will display a summary of the return. Be sure to note the Status field, which will indicate one of the following statuses:

- Processed
- Submitted
- Pending

For more information on these statuses, see "Processed versus Submitted versus Pending Returns" on page 116.

Satisfaction Refunds

Satisfaction Refunds allow you to refund a set dollar amount of the order without returning any items or canceling any subscriptions.

Notes

- The amount available for refunding is the total cost of the line items minus coupons. It does not include shipping or taxes.
- A Satisfaction Refund prorates the refund amount across all order items.
- The return quantity for all items is always zero because no quantities are returned.

- Satisfaction Refunds do not affect SplitPay and eSellerate affiliate earnings. All other types of refunds (except tax-only ones) can require adjustments to SplitPay and affiliate earnings.

For a Satisfaction Refund, you will need to complete the Verify Return Information page as follows:

- **Return Date** – The return date will use the current date by default. You can change the date if desired.
- **RMA Number** – If the return will use an RMA number, you can enter that number here (optional).
- **Reason for Return** – Click this list to select a return reason. If you need to edit or create a return reason before you make your selection, click the **Edit Return Reasons** icon. When you're finished, you will need to navigate back to the Verify Return Information page.
- **Comment** – Enter a comment (optional).
- **Return E-mail Sender Address** – This field allows you to specify the "From" address for the notification e-mail that eSellerate will send to the customer when you finish processing this return. You can accept the default address, or enter a different one.
- **Amount To Be Refunded** – Enter the refund amount here. This must be greater than $0 and no more than the "Amount Available for Refund" value.

When you're ready to proceed (there is no separate verification step with these refunds), click **Process The Return**.

Note: If the payment type for the order was international wire, you will have additional steps to complete at this time. See "Returning International Wire Orders" on page 117.

The Return Detail page will display a summary of the return. Be sure to note the Status field, which will indicate one of the following statuses:

- Processed
- Submitted
- Pending

For more information on these statuses, see "Processed versus Submitted versus Pending Returns" on page 116.

Partial Returns/Refunds

Note: For orders placed prior to August 31, 2010, coupon and shipping amounts will not be specified at the line level in Full Order Returns and Partial Returns/Refunds. Instead, these items will be applied across the entire order, and will appear in the top section of the returns pages. The look and functionality will be the same as returns done prior to when eSellerate expanded the options for returns (in August 2010).

With Partial Returns/Refunds you can return items and issue refunds on a line-by-line basis.

After you select order items to return and click **Specify Return Details**, the Specify Return Detail page appears.

Return Details

Complete the Return Details section as follows:

- **Return Date** – The return date will use the current date by default. You can change the date if desired.
- **RMA Number** – If the return will use an RMA number, you can enter that number here (optional).

- **Reason for Return** – Click this list to select a return reason. If you need to edit or create a return reason before you make your selection, click the **Edit Return Reasons** icon. When you're finished, you will need to navigate back to the Specify Return Detail page.
- **Comment** – Enter a comment (optional).
- **Return E-mail Sender Address** – This field allows you to specify the "From" address for the notification e-mail that eSellerate will send to the customer when you finish processing this return. You can accept the default address, or enter a different one.

Selected Items

For each selected item there will be a detailed listing of the amounts you are about to return. Depending on the item, you may have additional choices such as the following:

- **Restocking Fee** – You can use this field to specify an amount to be deducted from the customer's refund. For your consideration in determining a restocking fee, your transaction cost for the initial sale will be shown.
- **Restocking Fee Refund** – After you charge a restocking fee, you can go back to the order and refund all or part of the fee. Enter the refund amount in this field.
- **Quantity** – When the item quantity is greater than one, you can specify the quantity to return.

  Note: The Refundable Unit Amount is the amount per quantity available for refunding after all prior Satisfaction Refunds. This figure is not always equal to the full unit amount because a Satisfaction Refund can be an arbitrary amount. For example, assume that a prior Satisfaction Refund causes $2.00 to be refunded from a $10.00 item. The Refundable Unit Amount for that item would then be $8.00.

- **Cancel subscription for quantity specified** – If you leave this option selected, your return will cancel the subscription for the quantity specified, while leaving the subscription active for any quantities that are still available for returning.
- **Return Shipping** – The shipping amount (plus tax when applicable) for the item will be shown. To return that amount, leave the **Return Shipping** check box selected.

When you're reading to proceed and look over your return information before submitting it, click **Verify Return Information**.

Verify Return Information

To correct any return information listed, use your browser's back button and make the changes before proceeding.

When the return information is correct, click **Process The Return**.

Note: If the payment type for the order was international wire, you will have additional steps to complete at this time. See "Returning International Wire Orders" on page 117.

The Return Detail page will display a summary of the return. Be sure to note the Status field, which will indicate one of the following statuses:

- Processed
- Submitted
- Pending

For more information on these statuses, see "Processed versus Submitted versus Pending Returns" on page 116.

Tax-Only Refunds

If one of your customers wants to provide a tax ID after placing an order, you can contact eSellerate at support@esellerate.net to request a tax-only refund on the order.

eSellerate can process tax-only refunds for VAT and US tax. Refunding the tax does not affect the status of the order.

Voiding Orders

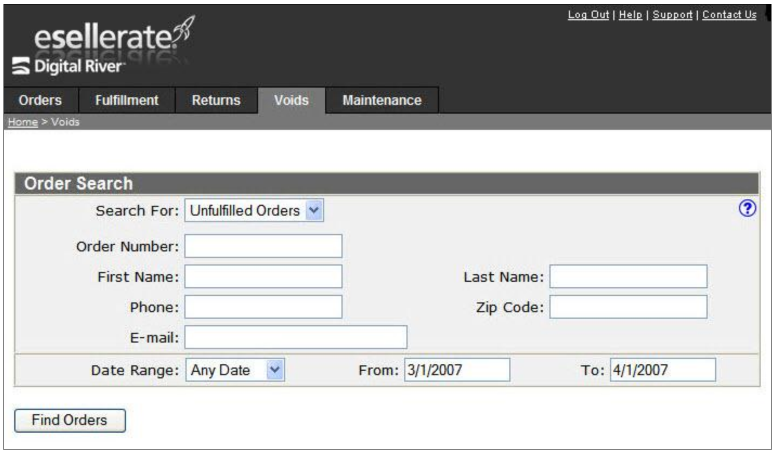
The Voids editor allows you to void unfulfilled orders before shipping occurs.

Notes on voids

- Although you can't void fulfilled orders, you can use the Returns editor to credit customers for all or part of the purchase amounts. For details, see "Returning Orders" on page 114.
- You cannot void orders that have payment methods of international wire or purchase order. In these instances, you would need to mark the orders fulfilled (without actually shipping anything) and then refund the orders through the Returns editor.
- E-check (ACH) orders are not available for voiding until eSellerate has received the payments.
- When an order involves charges for shipping items only:
  - Credit cards – eSellerate waits to capture any funds until you mark the order as fulfilled. (Or you can void the order to prevent any payment processing.) If you void the order, the order status becomes Void and the credit card authorization is allowed to expire.
  - PayPal – eSellerate captures all funds at the conclusion of the purchase. If you void the order, the order status becomes Canceled and the amounts captured for the shipping items are refunded to the customer.
  - ACH – eSellerate captures all funds in a single transaction, which requires 5-7 business days after the purchase for payment processing to be completed. If you void the order, the order status becomes Canceled and the amounts captured for the shipping items are refunded to the customer.
- When an order involves charges for both non-shipping and shipping items:
  - Credit cards – eSellerate captures funds for non-shipping items at the conclusion of the purchase, and delays capturing funds for shipping items until you mark the items as fulfilled. (Or you can void the order to prevent any additional payment processing.) The non-shipping items will remain fulfilled and cannot be voided. If you void the order, the order status becomes Fulfilled and no further payment processing occurs. The shipping items for the order will then have a status of Void.
  - PayPal – eSellerate captures all funds at the conclusion of the purchase. The non-shipping items will remain fulfilled and cannot be voided. If you void the order, the order status becomes Fulfilled and the amounts captured for the shipping items are refunded to the customer. The shipping items for the order will then have a status of Canceled.
  - ACH – eSellerate captures all funds in a single transaction, which requires 5-7 business days after the purchase for payment processing to be completed. The non-shipping items will remain fulfilled and cannot be voided. If you void the order, the order status becomes Fulfilled and the amounts captured for the shipping items are refunded to the customer. The shipping items for the order will then have a status of Canceled.
- If you void an order that involves charges for both non-shipping and shipping items, you will not be able to find that order by searching for voided orders, because its status will be Fulfilled. The Fulfilled status makes it possible for you to do a return or refund on the non-shipping items from the order, which are already fulfilled and cannot be voided.
- If your account is set up to integrate with Amazon Fulfillment, a search for unfulfilled orders can return orders that are pending fulfillment by Amazon. Normally, these orders are fulfilled automatically, so there is no need for you to take action unless you have a specific reason for voiding or returning the orders. See also "Integrating with Amazon Fulfillment" on page 154.

To void an order:

1. Click the **Voids** tab. The Voids page appears.



2. In the **Search For** list, use the default selection, **Unfulfilled Orders**.
3. Use any of the text fields and/or the **Date Range** list to narrow your search.
4. Click **Find**. This will display all orders that matched your search criteria.
5. Select the unfulfilled order by clicking on its order number. The Order Detail page appears.
6. Click **Void**.

Note: To protect against unintentional processing, you can only select and void one order at a time.

Note: The order information that is available through voids processing does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

Maintaining the XML Order Notice

Note: The information that is available through the XML order notice does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. (The values for that information will always be 0.) To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

The Maintenance tab of the Sales Manager provides two functions for maintaining the XML order notice (available through the Account Information page). For details on the notice, see "Using the XML Order Notice" on page 151.

Manually Posting the XML Order Notice

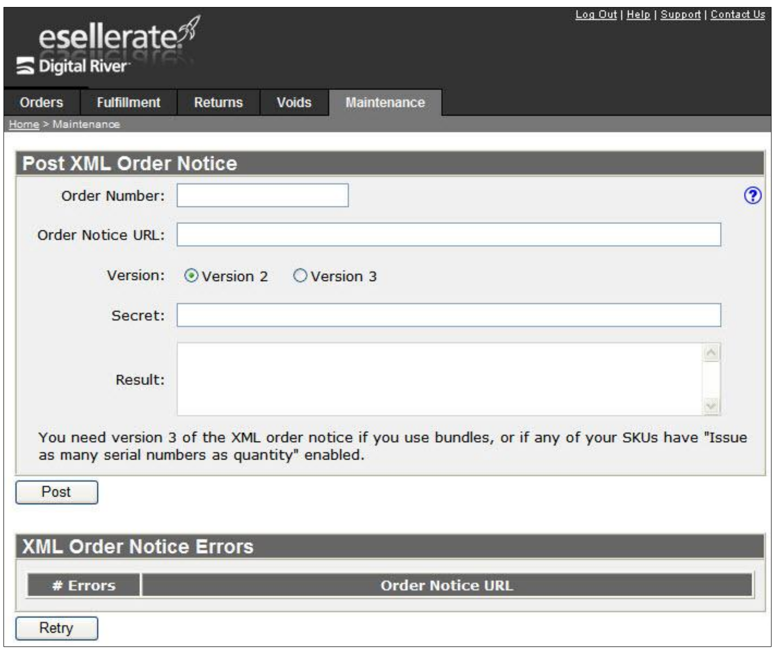
You can use this feature to manually post XML order notices to a specified URL.

Some examples of how this feature might be useful are:

- Before you set up the XML order notice option, you can test the URLs that will receive the notices.
- If eSellerate successfully posts an order notice but you need to post the notice again for any reason, you have that option.

To post an XML order notice:

1. Click the **Maintenance** tab. The XML Order Notice Maintenance page appears.

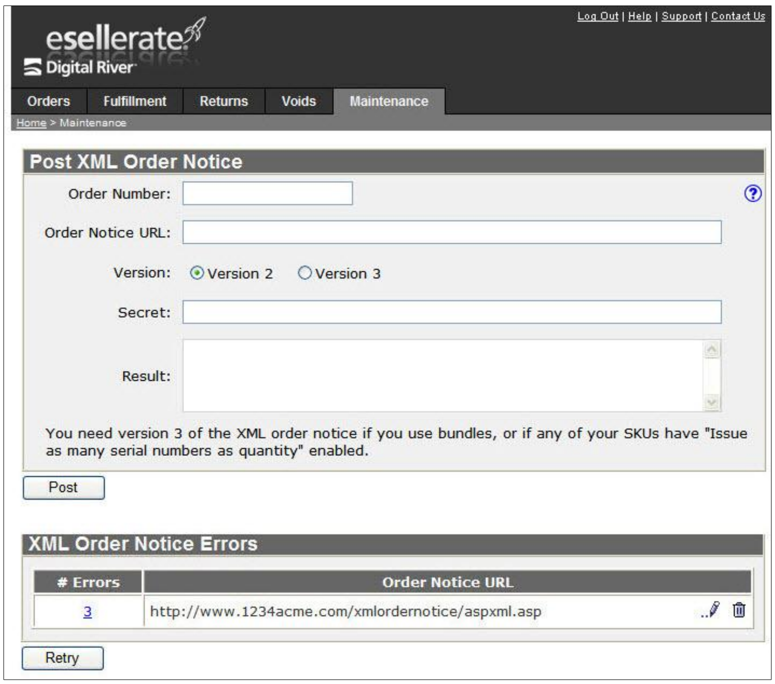


2. In the **Order Number** field, enter the order number to use for this notice.
3. In the **Order Notice URL** field, enter the URL that should receive this notice.
4. Select a version for the XML order notice. Version 2 is the legacy option that remains available for backwards compatibility. Version 3 includes all the information from version 2, with additional data fields for features that eSellerate released in May of 2009. You need version 3 if you use bundles, or if any of your SKUs have "Issue serial numbers in ratio to quantity" enabled. Also, version 3 includes fields for these 10 eSellerate variables: _Custom.Data10 through _Custom.Data19.

5. To enable you to verify the sender, eSellerate can include secret text in your data. Enter your text in the **Secret** field if desired. Otherwise, you can leave this field blank.
6. Click **Post**. The result displayed will specify success or failure, and include a response if the web server returned one.

Addressing XML Order Notice Errors

After you set up the XML order notice option, you will receive e-mail notification if eSellerate is unable to complete a post to your web server. This e-mail will list all XML order notice errors and provide a link that you can use to directly log in to your publisher account to address the problem.



The XML Order Notice Maintenance page within the Sales Manager's Maintenance tab will list all XML order errors for your account. This page provides three primary options for addressing the errors:

- Retry posting with the original URL
- Retry posting with a different URL
- Delete the errors

To change an order notice URL, do the following:

1. Click the pencil graphic to the right of the URL you want to change.
2. Edit the URL.
3. Click the disk graphic to save your changes.

To delete all order notice errors for a given URL, do the following:

1. Click the trash can graphic to the right of the order notice errors you want to delete. A confirmation dialog appears.
2. Click **OK** to delete the errors.

When you have finished changing URLs and deleting errors as needed, you can retry posting all order notices listed as errors. To do this, click **Retry**. The results displayed will list the number of posts attempted, and the number that succeeded.

Note: For your convenience, you will continue to receive the error notification e-mail until you have successfully posted or deleted all XML order notices that had errors.

Chapter 5 - References

The References section of the eSellerate Sales Manager is for completing the following tasks:

- "Creating Downloads" on next page
- "Creating Shipping Tables" on page 130
- "Creating Country Restrictions" on page 141
- "Creating URL Aliases" on page 143
- "Creating Categories" on page 145

Creating Downloads

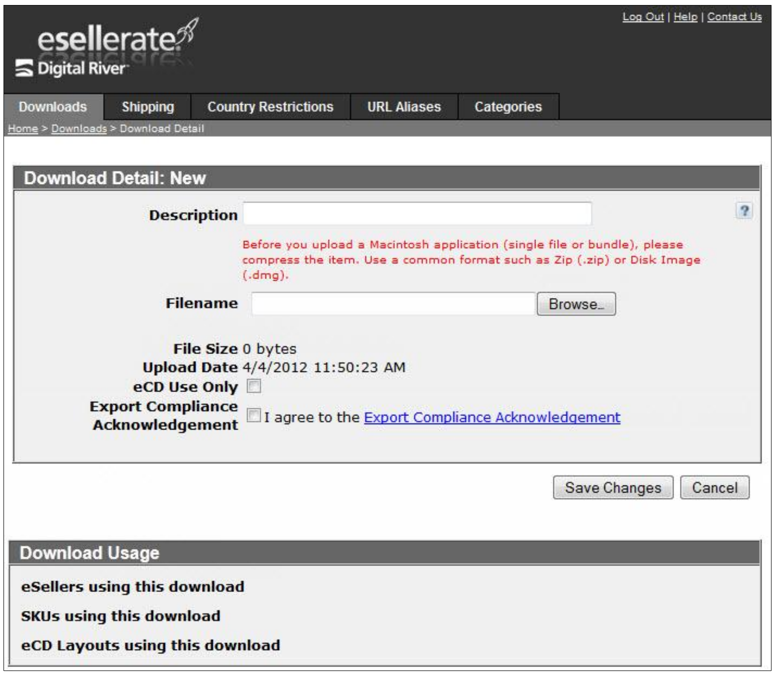
The Downloads editor allows you to upload files to the eSellerate servers and save the files as download items. You can then assign the downloads to your SKUs in the following ways:

- **SKU Download** (Basic tab) – This setting determines the default SKU download, which is the file that customers download when purchasing the SKU or getting a trial version from your web stores. (You can override the default SKU download with an individual eSeller.) See "Creating the SKU and Setting Its Basic Properties" on page 43.
- **eCD File** (Advanced tab) – This setting determines the file that is written to CD to represent the SKU when customers purchase eCD. See "Setting the SKU's Advanced Properties (Optional)" on page 49.

> **Note:** Another way to set the eCD file is through the eCD Configuration tab. See "Valid SKUs" on page 230.

To create downloads:

1. Click the **Downloads** tab. The Downloads page appears.
2. Click **New**. The Download Detail page appears.



3. Complete the **Description** field.
4. Click **Browse** (or **Choose File** if you're using Chrome or Safari) to select a file for uploading to the eSellerate servers.

> **Note:** Before you upload a Macintosh application (single file or bundle), please compress the item. Use a common format such as Zip (.zip) or Disk Image (.dmg).

5. If you plan to use the download for eCD only—as opposed to using it as a SKU download—select the **eCD Use Only** check box. This will prevent the item from showing up for selection as a SKU download.

> **Note:** You will not be able to select the **eCD Use Only** check box if the download is already in use as a SKU download. You can use the links provided under Download Usage to change the current download assignments, if needed.

6. You will need to agree to the Export Compliance Acknowledgement. Click the provided link to read the acknowledgement, and then select the check box that indicates your agreement with the acknowledgement.
7. Click **Save Changes**.

For information on updating a file that serves as an eST download, see "Updating eST Downloads" on page 262.

Downloads Total and Disk Quota

There is a maximum amount of disk space allocated to your account for storing downloads. That amount is shown on the Downloads page as Disk Quota. The amount of disk space that your downloads are using is shown as Downloads Total.

When you are close to reaching your disk quota, you will see a message about contacting your eSellerate account executive if you would like to increase your quota.

Once you reach your quota, the **New** button will be unavailable. As a result, you will be unable to create any new downloads until you delete some of the existing ones to free up disk space.

Deleting Downloads

From the Downloads page, select the download that you want to delete, and then click **Delete**.

> **Note:** You cannot delete a download if it is being used anywhere in your account. The dialog confirming your deletion attempt will show the download usage. You can use the links provided there to change the current download assignments, if needed.

Creating Shipping Tables

Note: No shipping setup is required to use the eCD fulfillment service.

If any of your products require shipping, you will need to create at least one type of shipping table, as explained here. You can then designate shipping requirements at the SKU level. For details, see "Setting the SKU's Advanced Properties (Optional)" on page 49.

About Shipping Units

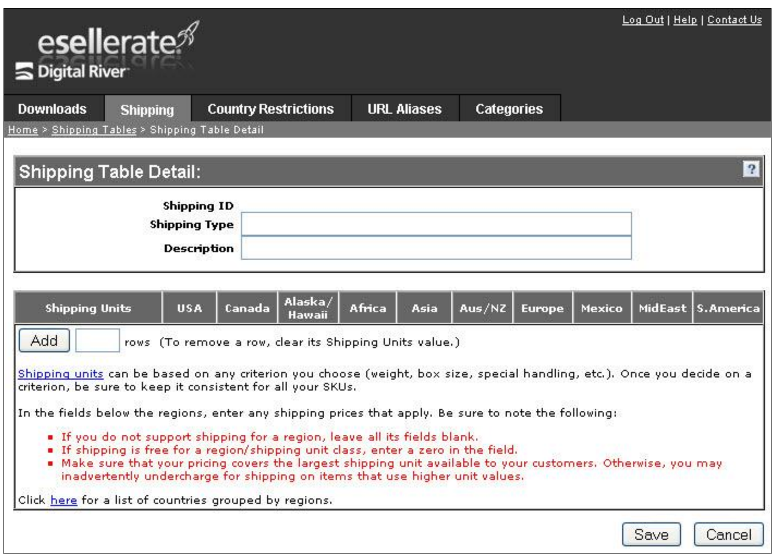
The eSellerate system uses shipping units to allow you complete flexibility in setting shipping prices. Rather than restrict pricing to a single measurement, such as weight, shipping units can be based on any criterion you choose.

The following are three different examples of shipping units.

- **Weight** – In this case, you would enter a weight in the Shipping Units field of each SKU that requires shipping. You can use any system of measurement, as long as it's consistent.
- **Box size** – For this example, shipping units would increase relative to the size of the box required to ship the products.
- **Degree of difficulty** – Because of special handling requirements, some products can cost more to ship than others, regardless of weight or size. For instance, shipments that involve expensive electronics would likely require special handling that a CD shipment would not. Shipping units allow you to set pricing to handle these special situations.

To create a shipping table:

1. Click the **Shipping** tab. The Shipping Tables page appears.
2. Click **New**. The Shipping Table Detail page appears.



3. In the **Shipping Type** field, enter the name that you want your customers to see for this option when they choose a shipping method.
4. If desired, enter a description in the **Description** field. This information will not be visible to your customers.
5. In the first row of the Shipping Units dialog, enter the shipping costs for your entry-level shipping unit

class.

Note: If you do not support shipping for a region, leave all its fields blank. If shipping is free for a region/shipping unit class, enter a zero in the field.

6. In the **Shipping Units** field of the second row, enter the minimum shipping units required for your second shipping unit class. For instance, if you enter 5 here, all SKUs with fewer than 5 shipping units would use the rates from your first shipping units class.
7. Enter the shipping costs for the second row.

Note: Make sure that your pricing covers the largest shipping unit available to your customers. Otherwise, you may inadvertently undercharge for shipping on items that use higher unit values.

8. When you're finished, click **Save**.

Shipping Table Example

For SKUs using the shipping table shown here, the following statements would be true:

- Shipping is available to these regions only: U.S., Canada, Alaska/Hawaii and Europe.
- If the SKU requires 1.25 shipping units, shipping to the USA region is free.
- If the SKU requires 7.5 shipping units, the shipping rates are $11.50 for USA and $15.25 for all other supported regions.
- If the SKU requires 10.00 or more shipping units, the maximum shipping rates ($15.50 for USA, $21.25 for all other supported regions) apply.

Shipping Units	USA	Canada	Alaska/ Hawaii	Africa	Asia	Aus/NZ	Europe	Mexico	MidEast	S.America
0.00 or more	0.00	8.50	8.50				8.50			
2.00 or more	7.50	10.25	10.75				10.25			
4.00 or more	9.25	13.50	13.50				13.50			
6.00 or more	11.50	15.25	15.25				15.25			
8.00 or more	13.25	18.50	18.50				18.50			
10.00 or more	15.50	21.25	21.25				21.25			
or more										

Shipping Regions

Name	Shipping Region
Afghanistan	MIDDLE_EAST
Aland Islands	EUROPE
Albania	EUROPE
Algeria	AFRICA
American Samoa	AUSTRALIA_NEW_ZEALAND
Andorra	EUROPE

Name	Shipping Region
Angola	AFRICA
Anguilla	MEXICO_CARIBBEAN
Antarctica	ANTARTICA
Antigua and Barbuda	MEXICO_CARIBBEAN
Argentina	SOUTH_AMERICA
Armenia	JAPAN_ASIA
Aruba	MEXICO_CARIBBEAN
Australia	AUSTRALIA_NEW_ZEALAND
Austria	EUROPE
Azerbaijan	JAPAN_ASIA
Bahamas	MEXICO_CARIBBEAN
Bahrain	MIDDLE_EAST
Bangladesh	JAPAN_ASIA
Barbados	MEXICO_CARIBBEAN
Belarus	EUROPE
Belgium	EUROPE
Belize	MEXICO_CARIBBEAN
Benin	AFRICA
Bermuda	MEXICO_CARIBBEAN
Bhutan	JAPAN_ASIA
Bolivia	SOUTH_AMERICA
Bonaire, Saint Eustatius and Saba	MEXICO_CARIBBEAN
Bosnia and Herzegovina	EUROPE
Botswana	AFRICA
Bouvet Island	AUSTRALIA_NEW_ZEALAND
Brazil	SOUTH_AMERICA
British Indian Ocean Terr.	MEXICO_CARIBBEAN

Name	Shipping Region
Brunei Darussalam	JAPAN_ASIA
Bulgaria	EUROPE
Burkina Faso	AFRICA
Burundi	AFRICA
Cambodia	JAPAN_ASIA
Cameroon	AFRICA
Canada	CANADA
Cape Verde	AFRICA
Cayman Islands	MEXICO_CARIBBEAN
Central African Republic	AFRICA
Chad	AFRICA
Chile	SOUTH_AMERICA
China	JAPAN_ASIA
Christmas Island	AUSTRALIA_NEW_ZEALAND
Cocos (Keeling) Islands	AUSTRALIA_NEW_ZEALAND
Colombia	SOUTH_AMERICA
Comoros	AFRICA
Congo	AFRICA
Congo, Dem. Rep. of the	AFRICA
Cook Islands	AUSTRALIA_NEW_ZEALAND
Costa Rica	MEXICO_CARIBBEAN
Cote d'Ivoire	AFRICA
Croatia (Hrvatska)	EUROPE
Cyprus	MIDDLE_EAST
Czech Republic	EUROPE
Denmark	EUROPE
Djibouti	AFRICA

Name	Shipping Region
Dominica	MEXICO_CARIBBEAN
Dominican Republic	MEXICO_CARIBBEAN
Ecuador	SOUTH_AMERICA
Egypt	MIDDLE_EAST
El Salvador	MEXICO_CARIBBEAN
Equatorial Guinea	AFRICA
Eritrea	AFRICA
Estonia	EUROPE
Ethiopia	AFRICA
Falkland Islands	SOUTH_AMERICA
Faroe Islands	EUROPE
Fiji	AUSTRALIA_NEW_ZEALAND
Finland	EUROPE
France	EUROPE
French Guiana	SOUTH_AMERICA
French Polynesia	EUROPE
French Southern Terr.	EUROPE
Gabon	AFRICA
Gambia	AFRICA
Georgia	JAPAN_ASIA
Germany	EUROPE
Gibraltar	EUROPE
Greece	EUROPE
Greenland	EUROPE
Grenada	MEXICO_CARIBBEAN
Guadeloupe	MEXICO_CARIBBEAN
Guam	AUSTRALIA_NEW_ZEALAND

Name	Shipping Region
Guatemala	MEXICO_CARIBBEAN
Guernsey	EUROPE
Guinea	AFRICA
Guinea-Bissau	AFRICA
Guyana	SOUTH_AMERICA
Haiti	MEXICO_CARIBBEAN
Heard and McDonald Is.	AUSTRALIA_NEW_ZEALAND
Honduras	MEXICO_CARIBBEAN
Hong Kong	JAPAN_ASIA
Hungary	EUROPE
Iceland	EUROPE
India	JAPAN_ASIA
Indonesia	JAPAN_ASIA
Ireland	EUROPE
Isle of Man	EUROPE
Israel	MIDDLE_EAST
Italy	EUROPE
Jamaica	MEXICO_CARIBBEAN
Japan	JAPAN_ASIA
Jersey	EUROPE
Jordan	MIDDLE_EAST
Kazakhstan	JAPAN_ASIA
Kenya	AFRICA
Kiribati	AUSTRALIA_NEW_ZEALAND
Korea, South	JAPAN_ASIA
Kuwait	MIDDLE_EAST
Kyrgyzstan	JAPAN_ASIA

Name	Shipping Region
Lao People's Dem. Rep.	JAPAN_ASIA
Latvia	EUROPE
Lebanon	MIDDLE_EAST
Lesotho	AFRICA
Liberia	AFRICA
Liechtenstein	EUROPE
Lithuania	EUROPE
Luxembourg	EUROPE
Macau	JAPAN_ASIA
Macedonia	EUROPE
Madagascar	AFRICA
Malawi	AFRICA
Malaysia	JAPAN_ASIA
Maldives	JAPAN_ASIA
Mali	AFRICA
Malta	EUROPE
Marshall Islands	AUSTRALIA_NEW_ZEALAND
Martinique	MEXICO_CARIBBEAN
Mauritania	AFRICA
Mauritius	AFRICA
Mayotte	AFRICA
Mexico	MEXICO_CARIBBEAN
Micronesia	AUSTRALIA_NEW_ZEALAND
Moldova	EUROPE
Monaco	EUROPE
Mongolia	JAPAN_ASIA
Montenegro	EUROPE

Name	Shipping Region
Montserrat	MEXICO_CARIBBEAN
Morocco	AFRICA
Mozambique	AFRICA
Myanmar	JAPAN_ASIA
Namibia	AFRICA
Nauru	AUSTRALIA_NEW_ZEALAND
Nepal	JAPAN_ASIA
Netherlands	EUROPE
New Caledonia	AUSTRALIA_NEW_ZEALAND
New Zealand	AUSTRALIA_NEW_ZEALAND
Nicaragua	MEXICO_CARIBBEAN
Niger	AFRICA
Niue	AUSTRALIA_NEW_ZEALAND
Norfolk Island	AUSTRALIA_NEW_ZEALAND
Northern Mariana Is.	AUSTRALIA_NEW_ZEALAND
Norway	EUROPE
Oman	MIDDLE_EAST
Pakistan	JAPAN_ASIA
Palau	AUSTRALIA_NEW_ZEALAND
Palestinian Terr., Occupied	MIDDLE_EAST
Panama	MEXICO_CARIBBEAN
Papua New Guinea	AUSTRALIA_NEW_ZEALAND
Paraguay	SOUTH_AMERICA
Peru	SOUTH_AMERICA
Philippines	JAPAN_ASIA
Pitcairn	AUSTRALIA_NEW_ZEALAND
Poland	EUROPE

Name	Shipping Region
Portugal	EUROPE
Puerto Rico	MEXICO_CARIBBEAN
Qatar	MIDDLE_EAST
Reunion	AFRICA
Romania	EUROPE
Russian Federation	EUROPE
Rwanda	AFRICA
S.Georgia and S.Sandwich Is.	SOUTH_AMERICA
Saint Kitts and Nevis	MEXICO_CARIBBEAN
Saint Lucia	MEXICO_CARIBBEAN
Samoa	AUSTRALIA_NEW_ZEALAND
San Marino	EUROPE
Sao Tome and Principe	AFRICA
Saudi Arabia	MIDDLE_EAST
Senegal	AFRICA
Serbia	EUROPE
Seychelles	AFRICA
Sierra Leone	AFRICA
Sint Maarten	MEXICO_CARIBBEAN
Singapore	JAPAN_ASIA
Slovakia	EUROPE
Slovenia	EUROPE
Solomon Islands	AUSTRALIA_NEW_ZEALAND
Somalia	AFRICA
South Africa	AFRICA
Spain	EUROPE
Sri Lanka	JAPAN_ASIA

Name	Shipping Region
St. Helena	AFRICA
St. Pierre and Miquelon	CANADA
St. Vincent and Grenadines	MEXICO_CARIBBEAN
Suriname	SOUTH_AMERICA
Svalbard and Jan Mayen Is.	EUROPE
Swaziland	AFRICA
Sweden	EUROPE
Switzerland	EUROPE
Syrian Arab Republic	MIDDLE_EAST
Taiwan	JAPAN_ASIA
Tajikistan	JAPAN_ASIA
Tanzania	AFRICA
Thailand	JAPAN_ASIA
Timor-Leste	JAPAN_ASIA
Togo	AFRICA
Tokelau	AUSTRALIA_NEW_ZEALAND
Tonga	AUSTRALIA_NEW_ZEALAND
Trinidad and Tobago	MEXICO_CARIBBEAN
Tunisia	AFRICA
Turkey	EUROPE
Turkmenistan	JAPAN_ASIA
Turks and Caicos Islands	MEXICO_CARIBBEAN
Tuvalu	AUSTRALIA_NEW_ZEALAND
U.S. Minor Outlying Is.	AUSTRALIA_NEW_ZEALAND
Uganda	AFRICA
Ukraine	EUROPE
United Arab Emirates	MIDDLE_EAST

Name	Shipping Region
United Kingdom	EUROPE
United States	USA
Uruguay	SOUTH_AMERICA
Uzbekistan	JAPAN_ASIA
Vanuatu	AUSTRALIA_NEW_ZEALAND
Vatican (Holy See)	EUROPE
Venezuela	SOUTH_AMERICA
Virgin Islands (British)	MEXICO_CARIBBEAN
Virgin Islands (U.S.)	MEXICO_CARIBBEAN
Wallis and Futuna Is.	AUSTRALIA_NEW_ZEALAND
Western Sahara	AFRICA
Yemen	MIDDLE_EAST
Zambia	AFRICA
Zimbabwe	AFRICA

Shipping Regions

Creating Country Restrictions

This feature allows you to restrict customers in certain countries from purchasing a specific SKU. You will assign country restriction at the SKU level, so each of your SKUs may use its own restriction. When a customer submits an order for one of these SKUs, eSellerate will check the billing and shipping addresses against country restrictions. If either address is restricted, eSellerate will halt progress and display an informative message such as one of the following examples:

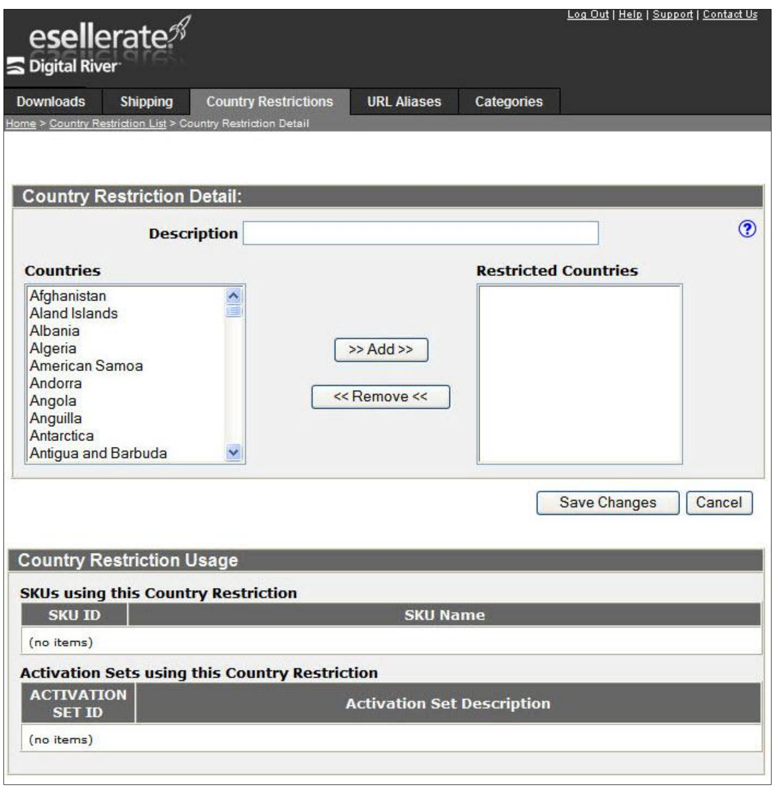
- SoftwareXCompany does not sell ProductX to your country.
- SoftwareXCompany does not ship the following products to your country:
  - SoftwareX1
  - SoftwareX2

For information about assigning country restrictions, see "Setting the SKU's Advanced Properties (Optional)" on page 49.

Note: A related use of country restrictions is to restrict customers in certain countries from activating software. For information on using country restrictions in conjunction with eSellerate Product Activation, see "Creating Product Activation Sets" on page 93.

To create a country restriction set:

1. Click the **Country Restrictions** tab. The Country Restriction list page appears.
2. Click **New**. The Country Restriction Detail page appears.



3. In the **Description** field, enter a description for this country restriction set. (There is a 50-character limit.)
4. In the **Countries** dialog box, select one or more countries to add to this set.

5. Click **Add**.
6. Click **Save Changes**.

Creating URL Aliases

This feature allows you to streamline your eSellerate web store URLs for a clean, uncomplicated look. For example, both of the following URLs will open a web store, add a SKU to the shopping cart and fill in a coupon ID, but the second URL is much shorter due to use of the alias feature:

- http://store.eSellerate.net/s.asp?s=STR123456789&Cmd=BUY&SKURefnum=SKU123456789&coupon=couponname
- http://store.eSellerate.net/mv/sale

To create a URL alias:

1. If you have not yet done so, the first step is to create a publisher short name. This unique publisher identifier will be part of all your URL aliases. It should be short yet descriptive. For instance, MindVision Software might use the short name "mv" as in the example alias above.
   a. From the URL Alias List page, click **New**.
   b. Enter a short name in the field provided. The name must use alphanumeric characters, and may include dashes.
   c. When you are finished, click **Create Short Name**.
2. From the URL Alias List page, click **New**. (After you have entered a publisher short name, the **New** button is available at the bottom of the page.) The URL Alias Detail page appears.
3. In the **Alias** field, enter a descriptive shortcut name to identify the alias. The name must use alphanumeric characters, and may include dashes. It will appear in the URL immediately after the publisher short name.
4. If desired, enter a **Description** for this alias. Text that you enter here is for your reference only, and will not appear in the URL.
5. This alias can direct the user to one of several places in the web store. Make your selection from the **Command** list.

   Note: The command that you select determines whether or not you should also specify a SKU for the URL alias. If you select **Show Web Store** or **Show Shopping Cart**, there is no need to specify a SKU. For any of the other commands, you should specify a SKU, either as part of the alias setup (see step 7), or by appending it to the alias (see "Appending Information to the URL Alias" on next page).

6. From the **Web Store** list, select the web store that this alias should use.
7. If desired, use the **SKU** list to select the SKU that this alias should use. If you do not make a selection from this list, you will be able to later append SKU information to the alias as needed.
8. If desired, use the **Coupon** list to select the coupon that this alias should use. If you do not make a selection from this list, you will be able to later append coupon information to the alias as needed.
9. The Pre-Validate option applies if you specified a coupon in the preceding step. If you select the **Pre-Validate** check box, eSellerate will validate the specified coupon immediately, rather than at the next form post. This allows the discounted amount to display immediately, if included on the layout page. Also note:
   - For information on using eSellerate variables to control what displays on layout pages, see "Variables Notes" on page 284.
   - Do not use this option for coupons that require user input, such as adding more items to the cart or entering an e-mail address used for previous purchases. Coupons such as these that eSellerate cannot immediately validate will cause errors.
   - This option affects Custom Layouts and Standard Layouts only.
10. The **Final URL** field dynamically fills in the complete alias as you design it. This field allows copying

but not editing.

When you are finished, click **Save Changes**.

After you create an alias, you can select and copy it from the **URL Alias** field displayed on the URL Alias List page.

Appending Information to the URL Alias

To append information such as SKU RefNum or coupon or affiliate IDs to the alias, precede the first entry with a "?" and separate additional entries with "&" as in the examples below.

Note: You should not append SKU RefNum or coupon ID to an alias that already uses that information. In such a case, the SKU and coupon information specified in the alias will be used instead of the appended information. The same applies to the eSeller ID and commands such as "Buy," as these are always set in the alias.

Original

http://store.eSellerate.net/mv/sale

With a coupon

http://store.eSellerate.net/mv/sale?coupon=couponname

With a SKU and a coupon

http://store.eSellerate.net/mv/sale?SKURefnum=SKU123456789&coupon=couponname

With a SKU and a tracking ID

http://store.eSellerate.net/mv/sale?SKURefnum=SKU123456789&PT=trackingID

With a basic affiliate

http://store.eSellerate.net/mv/sale?AffIDC=AFF123456789

With an eSellerate Affiliate

http://store.eSellerate.net/mv/sale?AffIDC=AFL123456789

Note: Various navigation URLs for a specific web store are available in the Web Store Links section of the Web Store eSeller Summary page. See "Web Store: Links" on page 368.

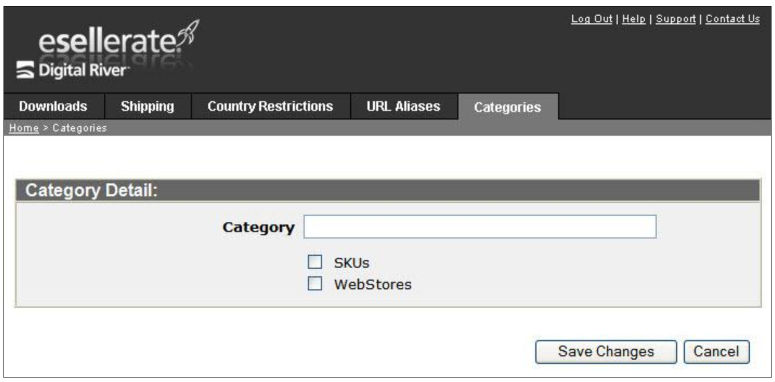
Creating Categories

Categories allow you to organize how your SKUs appear in search lists. You can also use categories to organize the display of SKUs in your eSellerate web stores. For information about assigning categories, see:

- "Creating the SKU and Setting Its Basic Properties" on page 43
- "Adding Embedded Web Store SKUs" on page 323
- "Adding Web Store SKUs" on page 364

To create a category:

1. Click the **Categories** tab. The Categories page appears.
2. Click **New**. The Category Detail page appears.



3. In the **Category** field, enter a name for this category.

> **Note:** If you use this category in your web stores, the name that you enter here will be visible to your customers.

4. This category can apply to SKUs, web stores or both of these options. Select the appropriates check boxes.
5. Click **Save Changes**.

Chapter 6 - Account Management

The Account Management section of the eSellerate Sales Manager is for completing the following tasks:

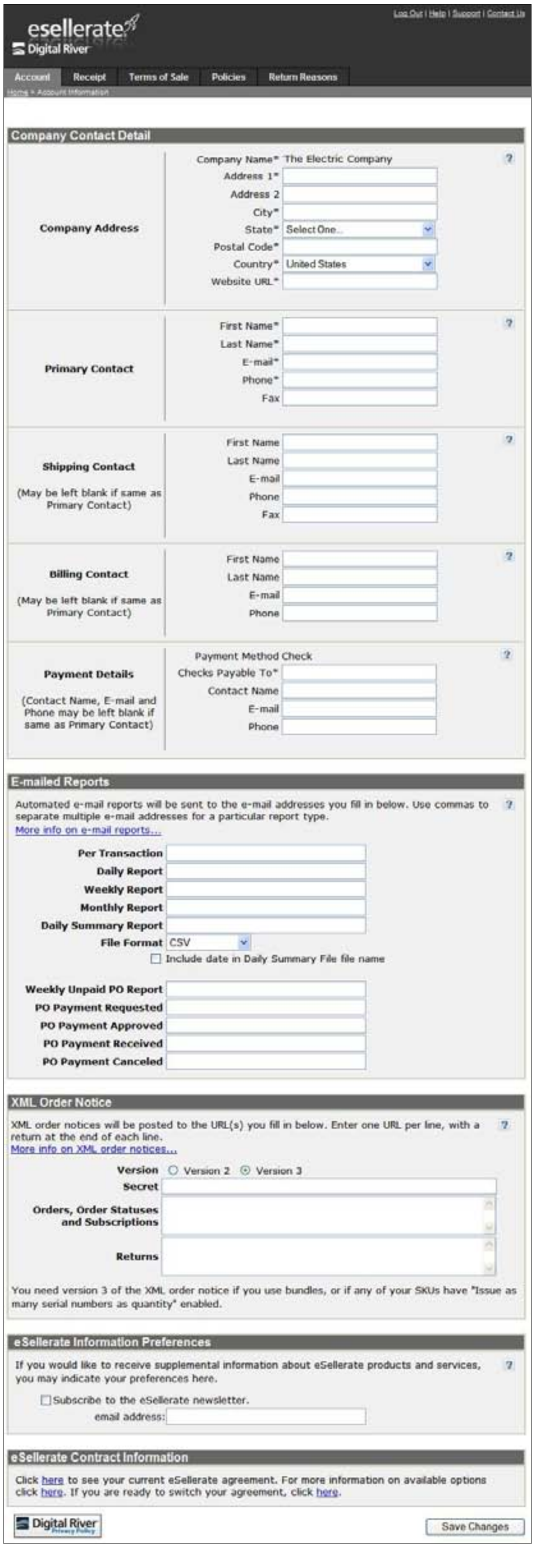
- "Entering Account Information" on next page
- "Entering Default Receipt Information" on page 155
- "Creating Terms of Sale" on page 158
- "Entering Return and Privacy Policies" on page 159
- "Creating Return Reasons" on page 162

Entering Account Information

Note: Login information for the logged-in user is available under My Profile, in the User Management section of the eSellerate Sales Manager. For more information, see "My Profile" on page 316.

To enter account information:

1. Click the **Account Information** tab. The Account Information page appears.



2. In the Company Contact Detail section, enter the required information for company contacts:
    - **Company Address** – Enter your company's physical address here. We will use this address for all correspondence sent through postal mail. Also enter the URL of your company's primary web site, which we will retain for reference purposes.

      > **Note:** When you have completed the eSellerate sign-up process, your saved **Company Name** will become non-editable. Should you wish to change this information, please contact your assigned account executive.

    - **Primary Contact** – Who will be our primary contact for your account? Enter that person's information here.
    - **Shipping Contact** – Use this box to enter information for your shipping contact (the person responsible for fulfilling orders that require shipment). You can leave these fields blank if your shipping contact is the same as your primary contact. Otherwise, please complete all the fields.
    - **Billing Contact** – Use this box to enter information for your billing contact (the person responsible for accounts payable). You can leave these fields blank if your billing contact is the same as your primary contact. Otherwise, please complete all the fields.
    - **Payment Details** – Use this box to enter the following payment information:
        - **Contact Name, E-mail and Phone** – Here you can enter information for your payment contact (the person responsible for accounts receivable). You can leave these fields blank if your payment contact is the same as your primary contact. Otherwise, please complete all the fields.
        - **Checks Payable To** – If you receive your eSellerate payments by check, you will need to complete the **Checks Payable To** field (appears only when applicable).

          > **Note:** While you evaluate the eSellerate system, **Payment Method** will always appear as "Check" and the **Checks Payable To** field will be editable. You can leave the **Checks Payable To** field blank during your evaluation. If you later sign up with eSellerate and choose the check payment method, you can fill out the field at that time.

3. The E-mailed Reports section is for selecting automated reports that you want to receive. For each report type, enter one or more e-mail addresses for the recipients. Use commas to separate multiple e-mail addresses. You can leave any or all of these fields blank.

   The following reports are available:

    - If you would like to receive order information through e-mailed reports, it is available on a per-transaction basis, and as daily, weekly and monthly summaries. You can also choose to receive a daily summary report file for importing into a database. This file can be in CSV (comma-separated values) or tab-delimited format, and the file name can include the date if you choose that option.

      > **Note:** The daily summary report file does not include fields for bundles, deferred serial numbers or the "Issue serial numbers in ratio to quantity" SKU option. It also does not include fields for these 10 eSellerate variables: _Custom.Data10 through _Custom.Data19. If you need to receive any of this information, two alternatives to the daily summary report file are the XML order notice (version 3) and the Order Lookup Web Service. For information on these two options, see "Using the XML Order Notice" on the facing page.

    - To track orders that involve purchase order payments, you can use these reports:
        - **Weekly Unpaid PO Report** – This weekly report shows all purchase orders that are unpaid.

- **PO Payment Requested** – This is a notification that an order has been placed using purchase order as the payment method.
- **PO Payment Approved** – This is a notification that a credit check for the customer has been completed, and the purchase order payment has been approved. (This is also the time when customers receive notification that their orders are complete, and downloads, serial numbers and other purchased items become available to them.)
- **PO Payment Received** – This is a notification that payment for a purchase order has been received and processed.
- **PO Payment Canceled** – This is a notification that a purchase order payment has been canceled. (Canceling a purchase order payment is something that must be handled by eSellerate support.)

4. For information on the XML Order Notice section, see "Using the XML Order Notice" below.
5. If your account is set up to integrate with Amazon Fulfillment, the Amazon Web Service Key Identifiers section will be available. Here you can enter or paste in your **eSeller ID**, your **Marketplace**, your 20-character **Access Key ID** and your 40-character **Secret Access Key**. See also "Integrating with Amazon Fulfillment" on page 154.
6. From time to time, eSellerate will offer supplemental information about our products and services. You can indicate your preferences for receiving this information by selecting options in the eSellerate Information Preferences section.

   The following information is available:

   - **eSellerate newsletter** – Our e-mail newsletter is designed to help you get the most from eSellerate's features. This quarterly publication includes news about the latest features, tips and techniques for using eSellerate, and more.

   To subscribe to the eSellerate newsletter, select the appropriate check box and enter your e-mail address.

   Note: You can return to this page to update your preferences at any time.

7. If you have signed up with eSellerate (you're no longer just evaluating the system), the eSellerate Contract Information section will appear. You can use the provided links to see your current eSellerate contract, view the different contract options and switch to a different contract if desired.

   Note: If you signed your current eSellerate contract prior to November 1, 2010, the eSellerate Contract Information section will not appear. This section appears only for publishers who have accepted one of the newer click-through agreements.

8. Click **Save Changes**.

Using the XML Order Notice

Note: The information that is available through the XML order notice does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. (The values for that information will always be 0.) To find that information and more, please use Business Intelligence reports. See "Business Intelligence Reporting" on page 164.

For publishers desiring real-time order information in a format that allows maximum control and flexibility, eSellerate offers the XML order notice. With this option, eSellerate can post order information to your web servers in an open data format that you can use any way you choose.

A few examples of how you might use the XML data are:

- Post it to a database
- Combine it with other information sources
- Display it on a web page

- Send it as e-mail
- Access it through spreadsheets, applications and web services

Notes on the XML order notice

- Setting up and using this option requires a strong knowledge of web servers and XML.
- You can use this option in addition to eSellerate order e-mail notices. (Use of eSellerate reports is nonexclusive.)
- eSellerate can post your data to multiple URLs.
- We recommend using secure (https) web servers for receiving your data.
- We cannot send your data to web servers that require authentication (such as user name and password).
- You can use the Post XML Order Notice feature (available through Order Maintenance) to test URLs before you implement them.
- eSellerate sends XML order notices for all types of successful orders: active, preview, fulfilled and unfulfilled. You will need to filter your data accordingly.
- eSellerate provides an initial post when the order is placed, and subsequent posts for updates to the order. These updates can include changes to order status and changes to subscription information. Some examples of scenarios that would result in postings are:
  - New order – one post for the new order
  - Fulfill an order – one post for the updated order
  - Void an order – one post for the updated order
  - Return an order – one post for the updated order
  - Issue a deferred serial number through After-Purchase Services – one post for the updated order
  - New order that includes a subscription – one post for the new order and one post for the new subscription (with the subscription marked as active)
  - Return an order and cancel the subscription – one post for the updated order and one post for the updated subscription (with the subscription marked as canceled)
  - Cancel a subscription through After-Purchase Services – one post for the updated order (with the subscription marked as canceled)
  - Subscription expires – one post for the updated order (with the subscription marked as expired)
  - Recurring subscription billing fails – one post for the updated order (with the subscription marked as suspended)
  - Customer corrects payment method information within 30 days after a subscription is marked as suspended – one post for the updated order (with the subscription marked as active)
  - Customer does not correct payment method information within 30 days after a subscription is marked as suspended — one post for the updated order (with the subscription marked as canceled)
  - Subscription is renewed – one post for the updated order, one post for the new subscription and one post to indicate that the previous subscription was renewed
  - Customer updates subscription billing information (e-mail address, billing address, VAT ID) through After-Purchase Services – one post for the updated order
  - Customer updates billing e-mail address (which is separate from the one for subscription orders) through After-Purchase Services – one post for the updated order
- Because of the potential for multiple posts per order, you may need to update your records in response to posts that affect previous orders (depending on how you use the XML data).
- When a new order includes a subscription, the post for the new subscription will occur about an hour after the post for the new order.

- When you return an order, the post for the updated order typically occurs a day or two later, after eSellerate has processed the return.
- You will receive e-mail notification if eSellerate is unable to complete a post to your web server. This e-mail will list all XML order notice errors and provide a link that you can use to directly log in to your publisher account to address the problem. Also note:
  - You will receive e-mail notification for any kind of communication error, and when posts fail with an HTTP 5xx response error code. To ensure that eSellerate recognizes the failed posts and sends notifications as needed, you should set up your web server to return an HTTP 5xx error (such as HTTP 500) when there are exceptions in your code. If you just return HTTP 200 with your specific error, we will not parse the response and recognize it as a failed post.
- In addition to the XML order notice, eSellerate provides a web service that you can use to get complete information about any of your orders, in real time. Resources to help you implement the Order Lookup Web Service are included with our XML Resources download. (See "Preparing to Use the XML Data" below.) The available resources are:
  - A Read Me file (OrderLookupServiceReadMe.pdf) with general instructions for using the service
  - Sample code and a Windows application that you can use to look up your orders and get back basic results

Preparing to Use the XML Data

Before you begin receiving the XML order notice, you'll need to prepare for handling the raw data. eSellerate offers the following resources to help with this:

- The Order Lookup Service WSDL, which also describes the data in the order notice: https://secure.esellerate.net/orderlookup/orderlookupservice.wsdl
- Unsupported code examples for classic ASP, ASP.NET, XSLT, PHP and Ruby on Rails.
- A Read Me file (XMLOrderNoticeReadMe.pdf) with general instructions for using the examples
- Helpful commenting throughout the included code
- Items that apply only to version 2 of the XML order notice:
  - An XML Schema Definition (XSD) file with descriptions of the data format
  - A PDF document with information on data field names, types and lengths

These resources are available for downloading in Zip format through the eSellerate Downloads page. The link for accessing the downloads is on the Sales Manager home page, under the "What's New for eSellerate" information. (Use the "XML Resources (for publishers)" link.)

Note: The information that is available through the Order Lookup Web Service does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. (The values for that information will always be 0.) To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

Entering URLs and Secret Text

When you're ready to begin receiving the XML order notice, do the following:

1. Go to the XML Order Notice section of the Account Information page.
2. Select a version for the XML order notice. Version 2 is the legacy option that remains available for backwards compatibility. Version 3 includes all the information from version 2, with additional data fields for features that eSellerate released in May of 2009. You need version 3 if you use bundles, or if any of your SKUs have "Issue serial numbers in ratio to quantity" enabled. Also, version 3 includes fields for these 10 eSellerate variables: _Custom.Data10 through _Custom.Data19.

3. To enable you to verify the sender, eSellerate can include secret text in your data. Enter your text in the **Secret** field if desired. Otherwise, you can leave this field blank.
4. Notifications for all supported events except returns will be posted to the URLs that you specify in the **Orders, Order Statuses and Subscriptions** field. Enter one URL per line, with a return at the end of each line.
5. Notifications for returns will be posted to the URLs that you specify in the **Returns** field. Enter one URL per line, with a return at the end of each line.
6. Click **Save Changes**.

See Also

"Entering Account Information" on page 148

"Maintaining the XML Order Notice" on page 124

Integrating with Amazon Fulfillment

Normally, publishers selling physical products through eSellerate take care of all the fulfillment duties, from receiving shipping requests to shipping the products and marking the orders as fulfilled. As an alternative, we also offer the ability to integrate with Amazon Fulfillment, a service that enables merchants to outsource fulfillment of their products. Publishers who use this option can set up their eSellerate stores to send fulfillment requests to Amazon when orders require shipping. After shipping the items, Amazon sends "Your order has shipped" e-mails to the customers, and notifies eSellerate that fulfillment is complete. We then mark the orders as fulfilled.

Integration with Amazon Fulfillment is supported for Web Store eSellers (with Custom Layouts or Standard Layouts) and Embedded Web Store eSellers.

Publishers who use this option are solely responsible for their business relationships with Amazon Fulfillment. These responsibilities include everything from creating an account to maintaining inventory and paying Amazon for its services.

The ability to integrate with Amazon Fulfillment is available on request. If you're interested in this option, please contact your assigned account executive.

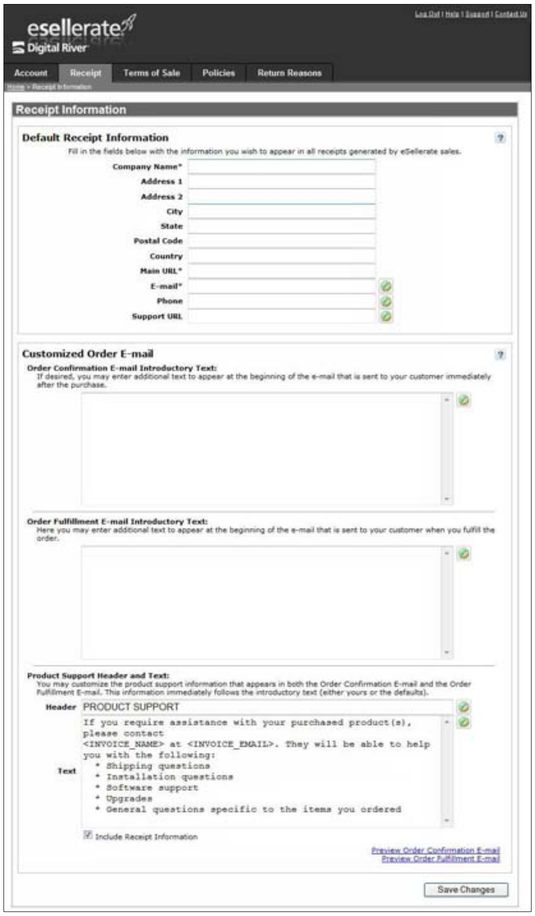
More Information

When you request this option, your account executive will provide documentation for using the Amazon Fulfillment features of eSellerate.

Entering Default Receipt Information

To enter default receipt information:

1. Click the **Receipt Information** tab. The Receipt Information page appears.



2. In the Default Receipt Information section, enter receipt information for your company. This information will appear in all receipts generated for you by eSellerate sales (with the exception of the override option described later in this step). Required fields are marked with an asterisk.

   Information you enter here will be used in the following places:

   - Receipts created by all eSellers at the conclusion of a purchase
   - Order Confirmation, Order Fulfillment and Return Notification e-mail sent to the customer
   - eSellerate Order Notice e-mail sent to the addresses specified for the per-transaction report (available through Account Information)
   - Packing slips
   - CD labels used in eCD fulfillment
   - Order information accessed by customers through eSellerate Credit Card Charges Information (http://www.eslr8.com) and eSellerate After-Purchase Services (http://store.eSellerate.net/support)

   In special cases that require different receipt information, you can override these defaults for individual eSellers. This option is available through the Receipt Information section of an eSeller's Detail page.

Information on how to customize receipts by editing Custom Layouts is available at "Receipt Page Notes" on page 293.

3. At the conclusion of a purchase, eSellerate sends the customer an e-mail that contains an order summary and support information. By default, the introductory text for this e-mail is as follows:

   Dear <customer name>,

   Thank you for purchasing from <publisher name>. You can find detailed information about your order under "ORDER SUMMARY" below. If you have any questions about your purchased product(s), please refer to the contact information under "<product support header>".

   If you would like to replace the "Thank you for purchasing ..." paragraph with your own information, you can enter the replacement text in the field provided for **Order Confirmation E-mail Introductory Text**. Otherwise, to accept the default paragraph, leave the field blank.

   See also "Formatting Your Custom Text" on the facing page.

4. Once you fulfill an order, eSellerate sends the customer an e-mail that contains a shipping summary and support information. By default, the introductory text for this e-mail is as follows:

   Dear <customer name>,

   The order you placed with <publisher name> on <order date> has shipped. Details appear in the summary below.

   If there is additional information that you would like to have appear immediately after this introductory text, you can enter it in the field provided for **Order Fulfillment E-mail Introductory Text**.

   See also "Formatting Your Custom Text" on the facing page.

5. In the Product Support Header and Text area, you can customize the product support information that appears in both the Order Confirmation E-mail and the Order Fulfillment E-mail. This information immediately follows the introductory text (either yours or the defaults).

   Enter your own header and text in the fields provided, or accept the defaults.

   See also "Formatting Your Custom Text" on the facing page.

   - If you select the **Include Receipt Information** check box, the product support information in the Order Confirmation and Order Fulfillment e-mail messages will include whatever you entered for receipt information. The Default Receipt Information (from step 2) will be used unless you have overridden the defaults for an individual eSeller, in which case the eSeller Receipt Information will be used.

6. Click either of the links at the bottom of the Receipt Information page to preview the respective e-mail messages with your custom text.

   Note: The Order Confirmation and Order Fulfillment previews are representative of the messages that eSellerate will send to your customers. The actual messages will include additional information for items such as serial numbers, bundles and subscriptions when appropriate.

7. Click **Save Changes.**

Note: You can also enter text to accompany any SKU's information in the Order Confirmation and Order Fulfillment e-mail messages. This enables you to provide your customers with information specific to each SKU in their order. The option is available on the Advanced tab of the SKU Detail page, as "Order E-mail and Receipt Text." For details, see "Setting the SKU's Advanced Properties (Optional)" on page 49.

Note: The Order Confirmation and Order Fulfillment e-mail messages include information specific to the customers' payment method.

For credit card, e-check (ACH) or international wire payments, there will be variations of the following text: "IMPORTANT: Your payment method will show a transaction from DRI*MERCHANTDESCRIPTOR in the amount of $XX.XX." (Each publisher has a unique merchant descriptor, which would display in the place listed here.)

For PayPal payments, the text will appear as follows: "IMPORTANT: Your PayPal account will show a transaction from eSellerate in the amount of $XX.XX."

For purchase orders, the text will appear as follows: "IMPORTANT: Our terms are "Due Upon Receipt". Please remit payment in the amount of $XX.XX to eSellerate. All funds must be in US dollars drawn on a US bank."

Formatting Your Custom Text

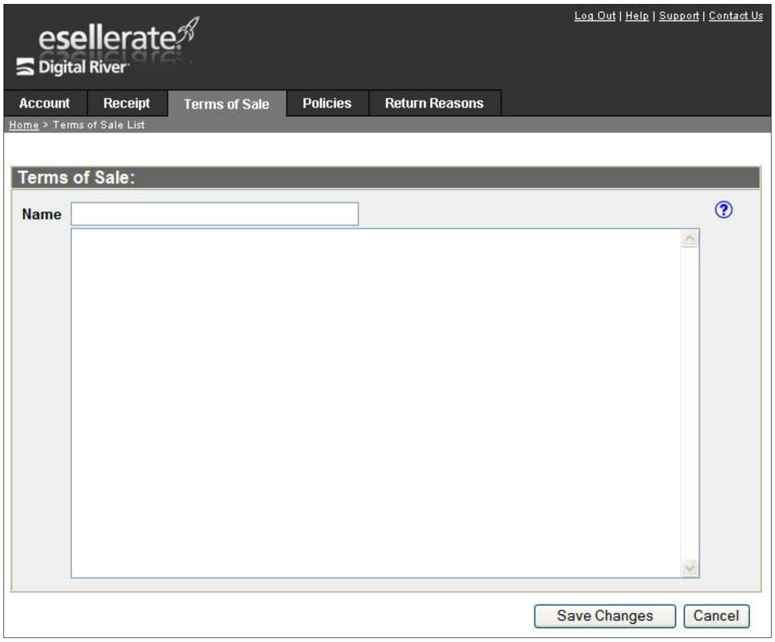
The Customized Order E-mail section provides three separate places where you can enter your own text to replace the default values: Order Confirmation E-mail Introductory Text, Order Fulfillment E-mail Introductory Text, and Product Support Header and Text. If you choose to enter your own text in any of these places, we recommend using plain text instead of HTML. Plain text is the better choice for ensuring that the e-mails will look good for all your customers. If you choose to use HTML, there are a few things to note. First, any HTML tags that you enter will be stripped before the text is displayed in clients that are set up to accept plain text only. Also, you should carefully test the plain-text and HTML versions of the e-mails in multiple clients. Finally, be sure to close your tags to prevent formatting issues that could affect the entire e-mail message.

Creating Terms of Sale

This feature allows you to specify terms that the customer must agree to before purchasing one of your products through eSellerate. You will assign terms of sale at the SKU level, so each of your SKUs may use its own terms. When a customer clicks the Buy button for one of these SKUs, your eSeller will display the appropriate Terms of Sale screen. For information about assigning terms of sale, see "Setting the SKU's Advanced Properties (Optional)" on page 49.

To create a terms of sale item:

1. Click the **Terms of Sale** tab. The Terms of Sale List page appears.
2. Click **New**. The Terms of Sale Detail page appears.



3. In the **Name** field, enter the name for this terms of sale item. (There is a 50-character limit.) The name is for internal identification purposes only, and will not be visible to your customers.
4. In the bottom field, enter the terms that you want to display to your customers. (Use plain text only.)
5. Click **Save Changes**.

Note: Although Web Store and Embedded Web Store eSellers will display as many Terms of Sale screens as necessary, Integrated eSellers will display a Terms of Sale screen only for the primary SKU. If you need to display terms of sale for your Integrated eSellers' cross-sell SKUs, one solution is to use installers to provide that functionality.

Note: Integrated eSellers require a special setting to display terms of sale as described here. For this, you will need to go to the eSeller's Software Delivery Wizard settings and select the **Override Terms with SKU Terms of Sale** check box. See "Creating an Integrated eSeller" on page 340.

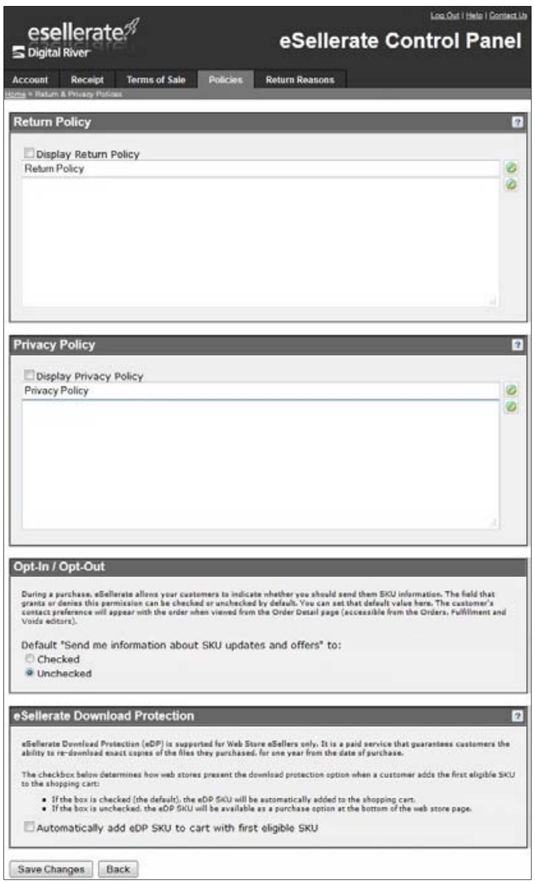
Entering Return and Privacy Policies

The Return & Privacy Policies page controls how your stores present the following items:

- Your return policy
- Your privacy policy
- The opt-in for your product updates and offers
- eSellerate Download Protection

To set up the preceding options:

1. Click the **Policies** tab. The Return & Privacy Policies page appears.



2. If you want to make your return policy available to your customers, go to the Return Policy section and do the following:
   - If you're ready for all your eSellers to display a link to the policy, select the **Display Return Policy** check box. Otherwise, you can save the policy and activate it later.
   - In the top field, enter the title for the policy. (There is a 50-character limit.)
   - In the bottom field, enter the policy that you want to display to your customers. (Use plain text only).
3. If you want to make your privacy policy available to your customers, go to the Privacy Policy section and do the following:
   - If you're ready for all your eSellers to display a link to the policy, select the **Display Privacy Policy** check box. Otherwise, you can save the policy and activate it later.

- In the top field, enter the title for the policy. (There is a 50-character limit.)
- In the bottom field, enter the policy that you want to display to your customers. (Use plain text only).

4. During a purchase, eSellerate allows your customers to indicate whether you should send them product information. The box that grants or denies this permission can be checked or unchecked by default. You can set that default value in the Opt-In/Opt-Out section.

   For **Default "Send me information about product updates and offers" to:**, select either **Checked** or **Unchecked** .

   The customer's contact preference will appear with the order when viewed from the Order Detail page (accessible from the Orders, Fulfillment and Voids editors).

5. In the eSellerate Download Protection service section, you can control whether or not the eDP SKU is automatically added to the shopping cart with the first eligible SKU. For more information, see "Presenting the eSellerate Download Protection (eDP) Option to Customers" below.
6. Click **Save Changes**.

Presenting the eSellerate Download Protection (eDP) Option to Customers

Available for $4.99 per order, eSellerate Download Protection service (eDP) guarantees customers the ability to re-download exact copies of the files they purchased, for one year from the date of purchase.

General Information on eDP

- eDP is supported for Web Store and Embedded Web Store eSellers only.
- There is nothing that you need to do to enable eDP, and you cannot disable it.
- eDP is available for purchase whenever the shopping cart contains at least one SKU that involves an electronic download.
- When the customer adds the first eligible SKU to the shopping cart, a hyperlinked "eDP available" graphic displays next to the SKU name, and eDP is automatically added to the cart. The customer can click the "eDP available" graphic to learn more about the option. If the customer removes eDP from the cart, eDP appears as a purchase option at the bottom of the page. (This is the default behavior for presenting eDP as a purchase option. For an alternative, see "Automatically Adding the eDP SKU to the Shopping Cart" on the facing page.)
- eDP will always be sorted to the bottom of the shopping cart.
- When purchased, eDP covers all SKUs in the order that involve electronic downloads.
- The Order Confirmation e-mail instructs customers to visit the eSellerate After-Purchase Services web page at http://store.esellerate.net/support to re-download the products they purchased.
- eSellerate creates one eDP SKU per publisher. You cannot access or edit this SKU.
- The eDP SKU will appear in order receipts and the Order Confirmation e-mail.
- eSellerate reports treat the eDP SKU like any other SKU.
- Downloads that are covered by eDP are known as "insured."
- With the exception of returns, insured downloads are always available for one year, regardless of any changes you make to the web stores and SKUs involved in the original orders. (Returned items are never available for re-downloading.)
- There is no charge to you for the bandwidth used when your customers re-download insured downloads.
- To prevent software piracy, eSellerate imposes a daily re-download limit on insured downloads. If a customer exceeds that re-download limit, the following message displays: "The re-download limit for

this order has been exceeded. If you have questions about this error message, please contact customerservice@esellerate.net."

- When testing your Web Store eSellers in preview mode, eDP purchases do not result in actual insured downloads, just as the simulated payment processing does not result in actual charges.

eDP Pricing and Order Processing

- eSellerate controls the base price of the eDP SKU.
- You earn $1 for each eDP SKU sold.
- Affiliates do not share in eDP SKU revenue.
- In contrast to eCD (another eSellerate service available to your web store customers), coupon discounts do not apply to the eDP SKU amount.
- eSellerate charges sales tax or Value Added Tax (VAT) on the sale of eDP SKUs, when applicable.
- eSellerate does not charge a processing fee on the sale of eDP SKUs.
- When processing orders, eSellerate adds its portion of the eDP SKU sale to the processing fee. This allows eSellerate reports and notices that show an eDP SKU sale to always reflect your net revenue ($1) on that sale.

eDP Returns

You can use the Returns editor to credit customers for the entire price of the eDP SKU (but not a portion of the price).

When you return an eDP SKU, the following events occur:

- The entire price is credited to the customer.
- eSellerate's portion of the sale is removed from the processing fee.
- A $1 negative adjustment is made to your net revenue on the sale.
- The download guarantee is removed for all downloads in the order.

You cannot specify a restocking fee on a returned eDP SKU.

See also "Returning Orders" on page 114.

Automatically Adding the eDP SKU to the Shopping Cart

The eSellerate Download Protection service area of the Return & Privacy Policies page provides a check box for determining how web stores present the eDP option when a customer adds the first eligible SKU to the shopping cart:

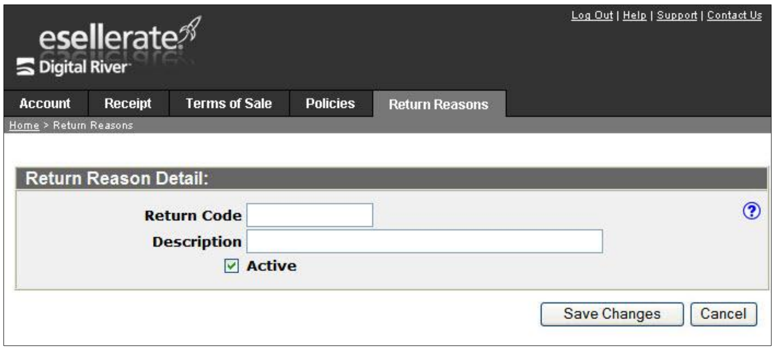
- If the box is checked (the default), a hyperlinked "eDP available" graphic will display next to the SKU name, and eDP will be automatically added to the cart. The customer can click the "eDP available" graphic to learn more about the option. If the customer removes eDP from the cart, eDP will appear as a purchase option at the bottom of the page.
- If the box is unchecked, a hyperlinked "eDP available" graphic will display next to the SKU name, and eDP will appear as a purchase option at the bottom of the page. The customer can click either the "eDP available" graphic or a "What is eDP" link to learn more about the option.

Creating Return Reasons

By default, the eSellerate system offers the following selections for use in processing returned orders: Changed Mind; Defective; Other; Purchased Competitor's. It also allows you to create your own return reasons to supplement these default selections.

To create a return reason:

1. Click the **Return Reasons** tab. The Return Reasons page appears.
2. Click **New**. The Return Reason Detail page appears.



3. In the **Return Code** field, enter text for identifying this item in searches.
4. In the **Description** field, enter text for identifying this item in lists of available return reasons.
5. If you're ready to make this return reason available for use, select the **Active** check box. Otherwise, you can save this return reason and activate it later.
6. Click **Save Changes**.

See Also

"Returning Orders" on page 114

Chapter 7 - Reports

The Reports section of the eSellerate Sales Manager is for accomplishing the following tasks:

- Running Business Intelligence and Business Navigator Reports
- "Running Customer Reports" on page 165
- "Running Sales Reports" on page 167
- "Running Payment Reports" on page 182
- "Running Admin Reports" on page 184
- "Running Pricing Reports" on page 195

Business Intelligence Reporting

Note: Beginning on 4/26/2011, we have temporarily enabled estimated costing information (your profit and our commission) for our on-screen reports. This short-term change will allow us to complete some enhancements to Business Intelligence and Business Navigator reports. When costing information has been temporarily enabled for a report, that fact will be noted in on-screen text, and on the associated help page.

Business Intelligence reporting is eSellerate's enhanced data and reporting solution. This is the option to use for finding your profit and eSellerate's commission on your orders from 4/1/2011 and later.

The benefits of this solution include:

- Enhanced reports – You get the reports you need, with the ability to look at different trends.
- Create your own reports – You have the option to create the reports you want to regularly see, with any of the multiple data points available.
- Export reports – You have the ability to export individual reports, specific data points or your reports that you create.
- Report scheduling tool – You can automatically set up a report to be processed daily, weekly, or monthly and have these reports available to you through in-screen viewing or e-mail in the selected format (CSV, semicolon, text pipe, HTML table, Excel Classic, XLSX OpenXML, XML eXtensible Markup Language).

There are two options for reporting:

- Business Intelligence reports allow a quick visual view on different data points.
- Business Navigator reports allow customization and data extraction. They also include scheduling and "save views" options for further customization.

To get to Business Intelligence reporting, go to the home page of the eSellerate Sales Manager, and in the Reports section, click either **Business Intelligence Reports** or **Business Navigator Reports**. Your current logged-in status for the Sales Manager will enable you to access the enhanced reports.

Running Customer Reports

The Customer Reports page provides access to the following reports:

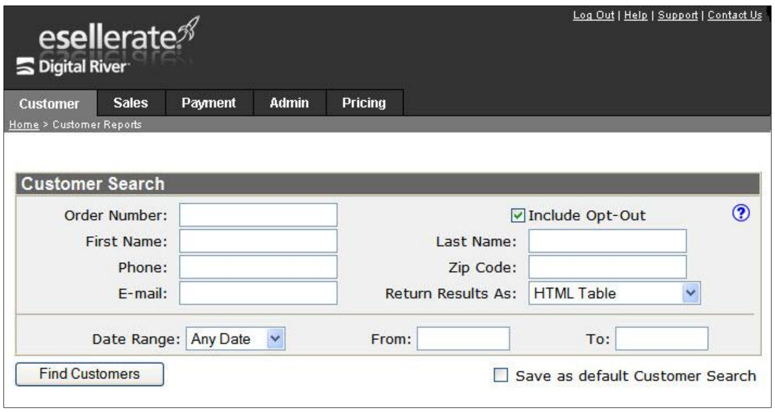
- "Customer Listing" below

Customer Listing

Use the Customer Reports function to produce customer lists. These lists can be general (such as all customers on record) or more specific (such as all customers in a certain zip code).

To run a customer report:

1. Click the **Customer Reports** tab. The Customer Reports page appears.
2. Click **Customer Listing**. The Customers page appears.



3. Use any of the text fields and/or the **Date Range** list to narrow the scope of your report, if desired.
4. By default, the **Include Opt-Out** check box is selected. If you clear this check box, the report will only include customers who asked to receive your product update information.

   Note: The "**Send me information about product updates and offers**" option that is presented in your stores can be checked or unchecked by default. You set that behavior in the Opt-In/Opt-Out section of the Return & Privacy Policies page.

5. This report can return results as an HTML table, a tab-delimited file or a comma-delimited file. Make your selection from the **Return Results As** list.
6. Click **Find Customers**.

If you selected HTML table results:

The table will display all customers that matched your report criteria.

For more information about a customer, click the appropriate **Name** field in the Customer List. This will display all orders for that customer that occurred in the specified date range.

You can now find more information about individual orders and returns for this customer.

- Click an **Order Number** field for details on an order.
- Click a **Return ID** field for details on a return.

Note: The order and return information that is available through this report does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on previous page.

If you selected tab-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".txt" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (Because this is a basic text file, you may need to specify that the data is in tab-delimited format.)

If you selected comma-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".csv" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (If a program prompts you to specify a format for this data, select comma-delimited or comma-separated values.)

Running Sales Reports

The Sales Reports page provides access to the following reports:

SKU Sales by Date Range

Note: Beginning on 4/26/2011, we have temporarily enabled estimated costing information (your profit and our commission) for our on-screen reports. This short-term change will allow us to complete some enhancements to Business Intelligence and Business Navigator reports.

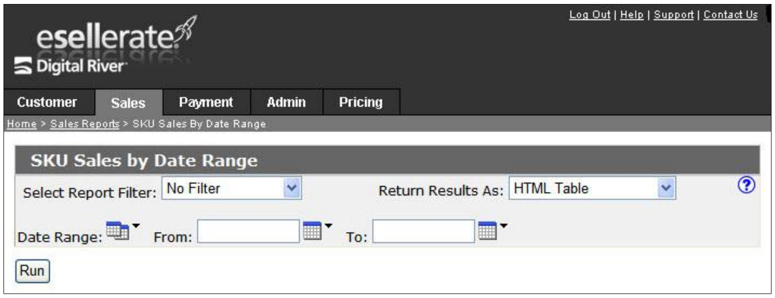
You can use this report to find SKU sales by date range based on any one of the following criteria:

- Basic Affiliate
- Channel
- eSellerate Affiliate
- Portal
- SKU
- SKU Category
- Subscription
- Tracking ID (see also "Using Tracking IDs" on page 180)

Note: The earliest possible date for subscription data in reports is 8/28/2007, which is when eSellerate introduced the subscriptions option.

To run a SKU Sales by Date Range report:

1. Click the **Sales Reports** tab.
2. Click **SKU Sales by Date Range**. The SKU Sales by Date Range page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. If you would like to filter your results for a criterion such as SKU or Tracking ID, do the following:
   1. Make a selection from the **Select Report Filter** list.
   2. If desired, use the list below **Select Report Filter** to narrow your results for a single item. (This step is required if you chose **SKU Category** or **Tracking ID** for the report filter.)
5. If you would like your report to find SKU sales within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
6. Click **Run**.

If you selected HTML table results:

The table will display all SKU sales that matched your report criteria.

Click any of the underlined column headings to sort your results by that criterion. An up arrow to the right of a column heading indicates that the report is sorted in ascending order (from the lowest to the highest value) by that criterion. A down arrow indicates descending order.

For more information about a SKU, click its **Description** field. This will display all orders for that SKU that matched your report criteria.

For more information about an individual SKU order, click its **Order ID** field.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

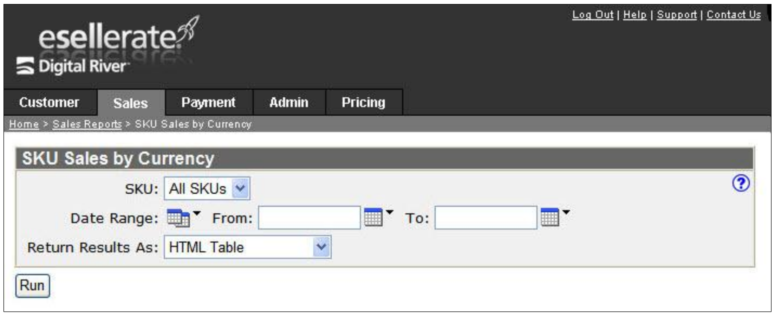
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

SKU Sales by Currency

Use this report to see the currencies that your customers used to purchase your SKUs on a given transaction date, and the percentage that each currency contributed to the total purchase quantity. For example, assume that on your chosen transaction date, SKU X had a total purchase quantity of two, with one sale in USD and the other in EURO. In this instance, the Percentage of Total Quantity Column for both currencies would show 50%.

To run a SKU Sales by Currency report:

1. Click the **Sales Reports** tab.
2. Click **SKU Sales by Currency**. The SKU Sales by Currency page appears.



3. If you would like to limit your report results to a single SKU, make your selection from the **SKU** list. Otherwise, you can accept the default setting, which is **All SKUs**.
4. If you would like your report to find SKU sales within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
5. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
6. Click **Run**.

If you selected HTML table results:

The table will display all SKU sales that matched your report criteria.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

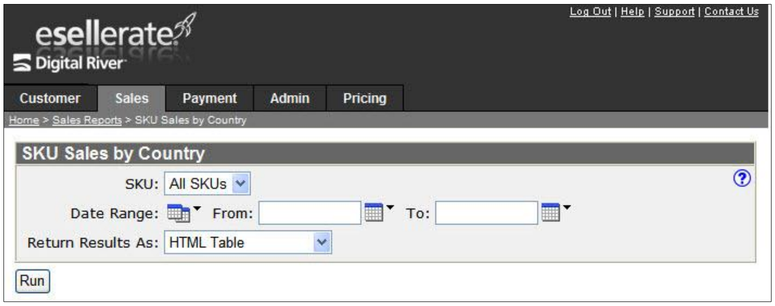
SKU Sales by Country

You can use this report to see your SKU sales broken down by the country from which they originated. The results also include the currencies that your customers used to purchase your SKUs on a given transaction date, and the percentage that each currency contributed to the total purchase quantity.

Note: The primary differences between this report and a related report, SKU Sales by Currency, are that this report includes country information, and sorts results by country name.

To run a SKU Sales by Country report:

1. Click the **Sales Reports** tab.
2. Click **SKU Sales by Country**. The SKU Sales by Country page appears.



3. If you would like to limit your report results to a single SKU, make your selection from the **SKU** list. Otherwise, you can accept the default setting, which is **All SKUs**.
4. If you would like your report to find SKU sales within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
5. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
6. Click **Run**.

If you selected HTML table results:

The table will display all SKU sales that matched your report criteria.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

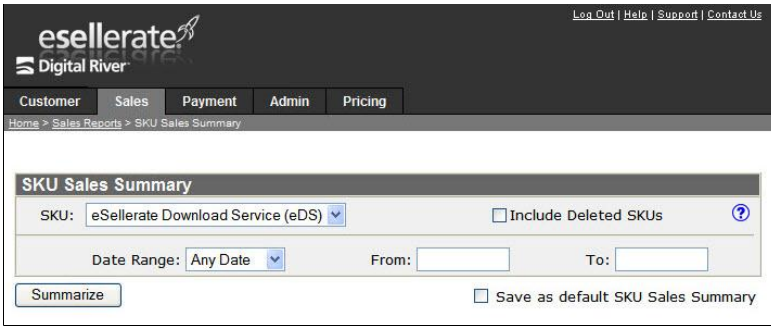
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

SKU Sales Summary

This report provides a sales summary for the selected SKU.

To run a SKU Sales Summary report:

1. Click the **Sales Reports** tab.
2. Click **SKU Sales Summary**. The SKU Sales Summary page appears.



3. If appropriate, select the **Include Deleted SKUs** check box. This will make any deleted SKUs available in the **SKU** list.
4. Make a selection from the **SKU** list.
5. Use the **Date Range** list to narrow the scope of your report, if desired. You can also edit or enter dates in the **From** and **To** fields.
6. Click **Summarize**. This will display all SKU sales that matched your report criteria.

Subscription SKU Sales Summary

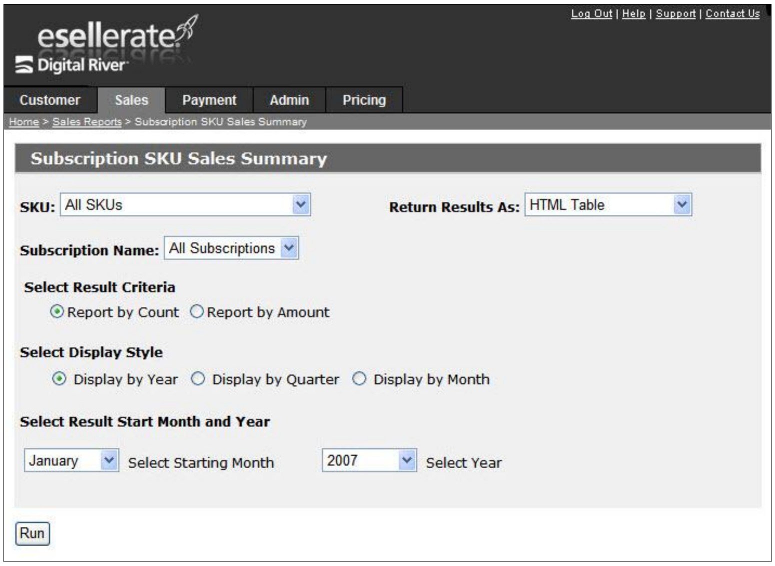
You can use this report to see subscription SKU sales by count or U.S. dollar amount, with the results broken down by year, quarter or month.

Notes

- The results can include subscriptions with any of the following statuses: new, billed, renewed, expired, set to expire, canceled and suspended.
- Billed status refers to the automatic charges that occur during the subscription duration, according to the billing frequency.
- A subscription goes into suspended status when eSellerate is unable to charge the customer's payment method for a scheduled billing during the duration, or when the reminder e-mail sent in advance of a scheduled billing is returned as undeliverable. In either case, eSellerate sends e-mail notifications to the appropriate parties with information on how to resolve the issue.
- If there are no sales to report for a given status, that status will not appear in the results. For example, if there were no new subscriptions sold during the reporting period, the results will not include a row for that information.
- The results for the following subscription statuses will include forecasts when future dates are involved: billed, renewed and expired. Another status, set to expire, always involves forecasts because it pertains to future expirations.
- Although forecasts can be useful for planning purposes, it's important to note that events such as the user canceling a subscription can affect the outcome.
- This report always returns results for one year, beginning with the month or quarter that you have selected. You cannot use this report to find results for more than a one-year period at a time.
- For the purposes of this report, manual renewal subscriptions expire at the end of their grace period, rather than at the end of their duration. Therefore, if a subscription is not appearing in report results as expected, check its grace period, which could have pushed the expiration date into the next month or quarter.

To run a Subscription SKU Sales Summary report:

1. Click the **Sales Reports** tab.
2. Click **Subscription SKU Sales Summary**. The Subscription SKU Sales Summary page appears.



3. If you would like to limit your report results to a single SKU, make your selection from the **SKU** list. Otherwise, you can accept the default setting, which is **All SKUs**.
4. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
5. If you would like to limit your report results to a single subscription, make your selection from the **Subscription Name** list. Otherwise, you can accept the default setting, which is **All Subscriptions**.
6. This report can provide subscription SKU sales information by count, such as the number of expired subscriptions, or by U.S. dollar amount. Make your selection from the choices provided.
7. This report can display results by year, quarter or month. Make your selection from the choices provided.
8. This report will find results for a one-year period. Select the starting month or quarter (whichever one applies) and the year for your report.
9. Click **Run**.

If you selected HTML table results:

The table will display all subscription SKU sales that matched your report criteria.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Transaction Ledger

Note: Beginning on 4/26/2011, we have temporarily enabled estimated costing information (your profit and our commission) for our on-screen reports. This short-term change will allow us to complete some enhancements to Business Intelligence and Business Navigator reports.

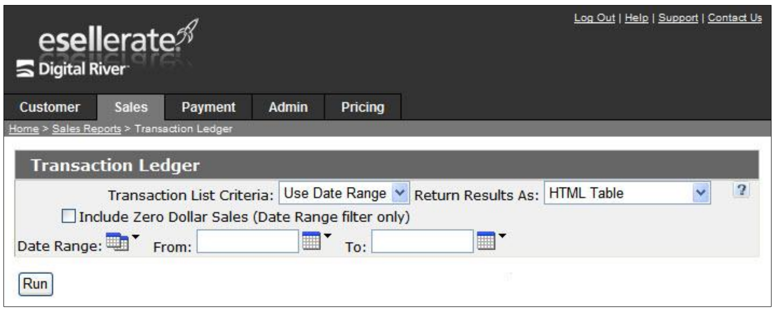
You can use this report to list transactions in three different ways:

- By date range, which lists transactions for any date(s)
- By payment ID, which lists transactions associated with a specific payment
- By unpaid items, which lists transactions that are not yet associated with a payment

The options for listing transactions are available through the **Transaction List Criteria** list. This list displays the payment date next to completed payments, and "Pending" next to payments for which a voucher has been created, but payment has not yet been made. It also includes an "All Unpaid Items" option, which you can use to search for transactions that are not yet associated with a payment.

To run a Transaction Ledger report:

1. Click the **Sales Reports** tab.
2. Click **Transaction Ledger**. The Transaction Ledger page appears.



3. See the instructions that follow for listing transactions by date range, payment ID or unpaid items.

To list transactions by date range:

1. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
2. Use the **Transaction List Criteria** list to select **Use Date Range**.
3. By default, this report will exclude line items that have a $0.00 gross amount. (Gross amount is the unit price before any adjustments such as coupon discounts and service fees are applied.) For example, if a given transaction involved a $5.00 SKU, a $0.00 SKU and $0.00 shipping, the Transaction Ledger report would list the $5.00 SKU only (by default). If you would like your report to include line items that have a $0.00 gross amount, select the **Include Zero Dollar Sales** check box.
4. If you would like your report to find transactions within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
5. Click **Run**.
6. See "Report Results" on next page.

To list transactions by payment ID or by unpaid items:

1. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
2. Use the **Transaction List Criteria** list to select a payment ID, or **All Unpaid Items**.
3. Click **Run**.
4. See "Report Results" below.

Note: The **From** and **To** date fields and the **Include Zero Dollar Sales** check box are only effective when listing transactions by date range. These options are ignored when listing transactions by payment ID or by unpaid items.

Report Results

The results of the Transaction Ledger report depend on your selection from the **Return Results As** list.

If you selected HTML table results:

The table will display all transactions that matched your report criteria.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Orders by Payment Type

Use this report to see the payment types that your customers used on a specific date or over a date range. The results will break down the usage for all supported payment types and allow you to compare statistics such as the percentage of total transactions for each type.

Note: The earliest date that this report will return is 12/1/2005. The reason is that December 2005 was the first full month after eSellerate began accepting multiple payment types.

To run an Orders by Payment Type report:

1. Click the **Sales Reports** tab.
2. Click **Orders by Payment Type**. The Orders by Payment Type page appears.

3. If you would like your report to find orders within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.

- Edit or enter dates in the fields.
- Right-click in each field, and then select from a list of common dates.
- Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)

4. Click **Run**.

Note: The credit card percentages in the Orders by Payment Type report account for all credit cards that eSellerate supports. PayPal percentages account for all PayPal payments, regardless of the funding source customers select when they authenticate their payments.

Daily Summary File

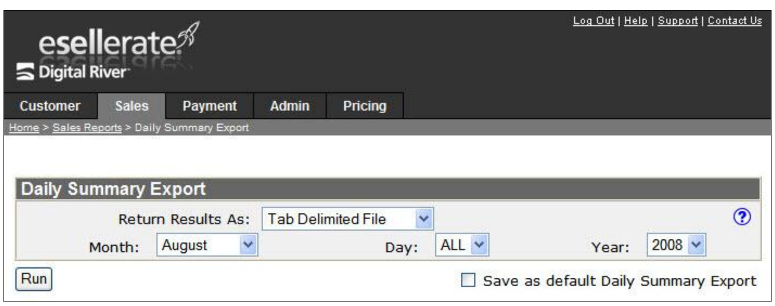
Note: Beginning on 4/26/2011, we have temporarily enabled estimated costing information (your profit and our commission) for our on-screen reports. This short-term change will allow us to complete some enhancements to Business Intelligence and Business Navigator reports.

You can use this report to get daily summary information for the specified time period.

Note: The Daily Summary Export does not include fields for bundles, deferred serial numbers or the "Issue serial numbers in ratio to quantity" SKU option. It also does not include fields for these 10 eSellerate variables: _Custom.Data10 through _Custom.Data19. If you need to receive any of this information, two alternatives to the Daily Summary Export are the XML order notice (version 3) and the Order Lookup Web Service. For information on these two options, see "Notes on the XML order notice" on page 152.

To run a Daily Summary Export:

1. Click the **Sales Reports** tab.
2. Click **Daily Summary File**. The Daily Summary Export page appears.



3. This report can return results as a tab-delimited file or a comma-delimited file. Make your selection from the **Return Results As** list.
4. Use the **Month**, **Day** and **Year** lists to specify the scope of your report.
5. Click **Run**.

If you selected tab-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".txt" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (Because this is a basic text file, you may need to specify that the data is in tab-delimited format.)

If you selected comma-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".csv" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (If a program prompts you to specify a format for this data, select comma-delimited or comma-separated values.)

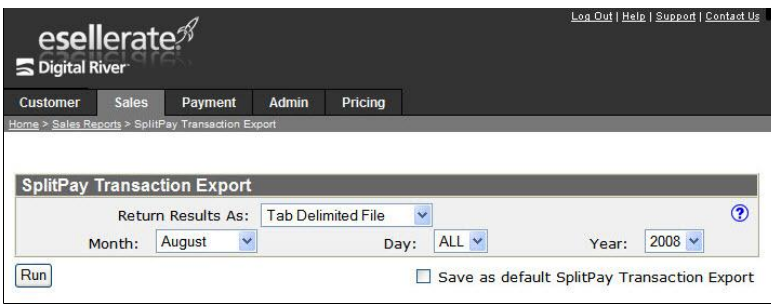
SplitPay Transaction Export

> **Note:** Beginning on 4/26/2011, we have temporarily enabled estimated costing information (your profit and our commission) for our on-screen reports. This short-term change will allow us to complete some enhancements to Business Intelligence and Business Navigator reports.

This report lists SplitPay transactions by month, day(s) and year.

To run a SplitPay Transaction Export:

1. Click the **Sales Reports** tab.
2. Click **SplitPay Transaction Export**. The SplitPay Transaction Export page appears.



3. This report can return results as a tab-delimited file or a comma-delimited file. Make your selection from the **Return Results As** list.
4. Use the **Month**, **Day** and **Year** lists to specify the scope of your report.
5. Click **Run**.

If you selected tab-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".txt" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (Because this is a basic text file, you may need to specify that the data is in tab-delimited format.)

If you selected comma-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".csv" before saving the file (applies to both Windows and Macintosh platforms).

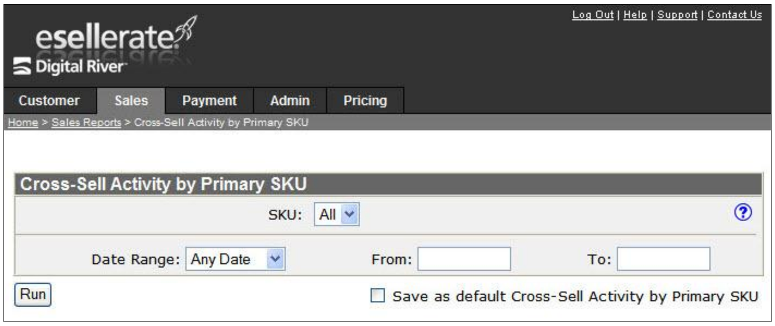
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (If a program prompts you to specify a format for this data, select comma-delimited or comma-separated values.)

Cross-Sell Activity by Primary SKU

This report shows the cross-sell activity of primary SKUs. It includes the number of cross-sell offers versus sales, which you can use to judge the effectiveness of your offers.

To run a Cross-Sell Activity by Primary SKU report:

1. Click the **Sales Reports** tab.
2. Click **Cross-Sell Activity by Primary SKU**. The Cross-Sell Activity by Primary SKU page appears.



3. Use the **SKUs** and/or the **Date Range** list to narrow the scope of your report, if desired. You can also edit or enter dates in the **From** and **To** fields.
4. **Click** Run. This will display all cross-sell activity that matched your report criteria.
5. For more information about a cross-sell SKU, click its **Cross-Sell SKU** field. This will display all cross-sell orders for that SKU in the specified date range.
6. You can now find more information about individual SKU orders and returns.
   - Click an **Order Number** field for details on an order.
   - Click a **Return ID** field for details on a return.

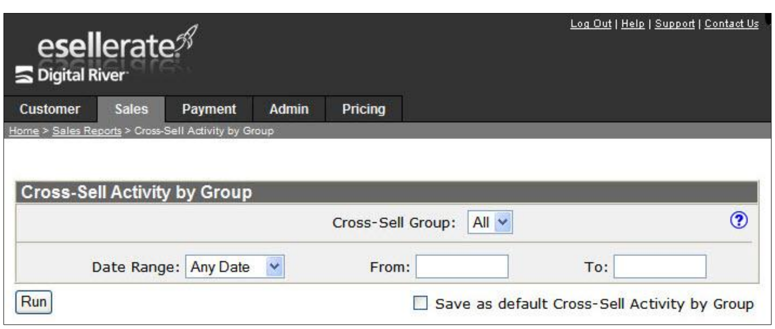
Note: The order and return information that is available through this report does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

Cross-Sell Activity by Group

Use this report to see cross-sell activity listed by group.

To run a Cross-Sell Activity by Group report:

1. Click the **Sales Reports** tab.
2. Click **Cross-Sell Activity by Group**. The Cross-Sell Activity by Group page appears.



3. Use the **Cross-Sell SKU Group** and/or the **Date Range** list to narrow the scope of your report, if desired. You can also edit or enter dates in the **From** and **To** fields.
4. Click **Run**. This will display all cross-sell activity that matched your report criteria.
5. For more information about a SKU, click its **SKU Name** field. This will display all cross-sell orders for that SKU that matched your report criteria.
6. You can now find more information about individual SKU orders and/or returns.
    - Click an **Order Number** field for details on an order.
    - Click a **Return ID** field for details on a return.

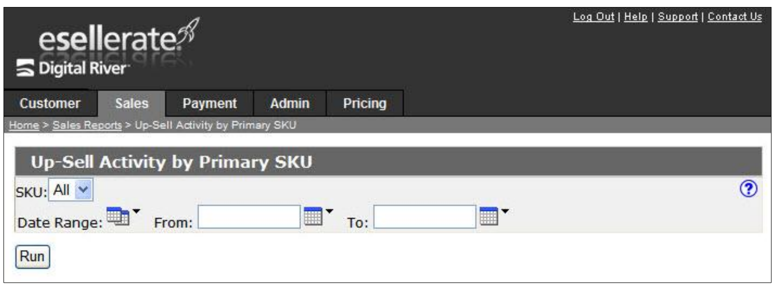
Note: The order and return information that is available through this report does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

Up-Sell Activity by Primary SKU

This report shows the up-sell activity of primary SKUs.

To run an Up-Sell Activity by Primary SKU report:

1. Click the **Sales Reports** tab.
2. Click **Up-Sell Activity by Primary SKU**. The Up-Sell Activity by Primary SKU page appears.



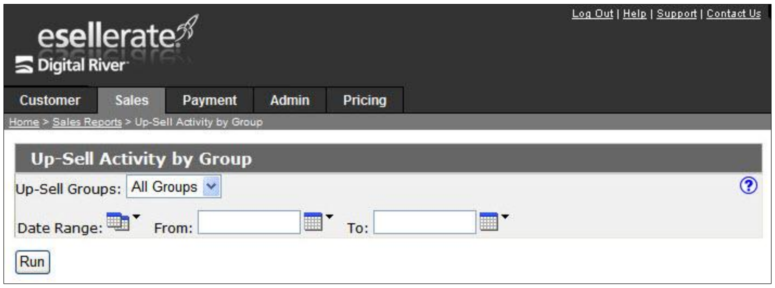
3. If you would like your report to find up-sell activity for a specific SKU, make your selection from the **SKU** list.
4. If you would like your report to find up-sell activity within a specific date range, do one of the following to complete the **From** and **To** date fields:
    - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
    - Edit or enter dates in the fields.
    - Right-click in each field, and then select from a list of common dates.
    - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
5. Click **Run**. This will display all up-sell activity that matched your report criteria.
6. To sort your results by any criterion included in the report, click the appropriate column heading. An up arrow to the right of a column heading indicates that the report is sorted in ascending order (from the lowest to the highest value) by that criterion. A down arrow indicates descending order.

Up-Sell Activity by Group

Use this report to see up-sell activity listed by group.

To run an Up-Sell Activity by Group report:

1. Click the **Sales Reports** tab.
2. Click **Up-Sell Activity by Group**. The Up-Sell Activity by Group page appears.



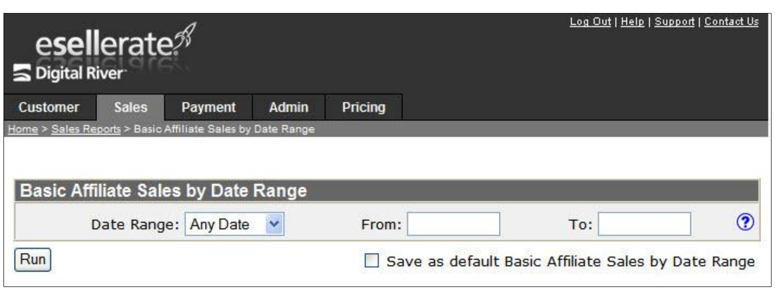
3. If you would like your report to find up-sell activity for a specific group, make your selection from the **Up-Sell Groups** list.
4. If you would like your report to find up-sell activity within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
5. Click **Run**. This will display all up-sell activity that matched your report criteria.
6. To sort your results by any criterion included in the report, click the appropriate column heading. An up arrow to the right of a column heading indicates that the report is sorted in ascending order (from the lowest to the highest value) by that criterion. A down arrow indicates descending order.

Basic Affiliate Sales by Date Range

Use this report to see basic affiliate sales listed by date range.

To run a Basic Affiliate Sales by Date Range report:

1. Click the **Sales Reports** tab.
2. Click **Basic Affiliate Sales by Date Range**. The Basic Affiliate Sales by Date Range page appears.



3. Use the **Date Range** list to narrow the scope of your report, if desired. can also edit or enter dates in the **From** and **To** fields.
4. Click **Run**. This will display all affiliate sales in the specified date range.

5. For more information about an affiliate, click its **Affiliate ID** field. The Basic Affiliate Detail page appears.
   - Click the **Affiliate ID** field for details on the affiliate.
   - Click an **Order Number** field for details on an affiliate order.
   - Click a **Return ID** field for details on a returned affiliate order.

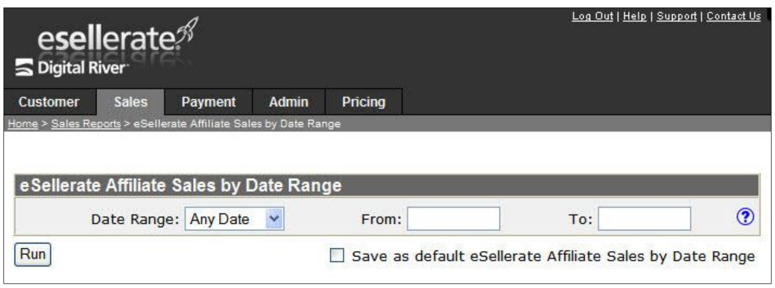
Note: Beginning on 4/26/2011, we have temporarily enabled estimated costing information (your profit and our commission) for our on-screen reports. This short-term change will allow us to complete some enhancements to Business Intelligence and Business Navigator reports.

eSellerate Affiliate Sales by Date Range

Use this report to see eSellerate Affiliate sales listed by date range.

To run an eSellerate Affiliate Sales by Date Range report:

1. Click the **Sales Reports** tab.
2. Click **eSellerate Affiliate Sales by Date Range**. The eSellerate Affiliate Sales by Date Range page appears.



3. Use the **Date Range** list to narrow the scope of your report, if desired. You can also edit or enter dates in the **From** and **To** fields.
4. Click **Run**. This will display all affiliate sales in the specified date range.
5. For more information about an affiliate, click its **Affiliate ID** field. The eSellerate Affiliate Detail page appears.
   - Click the **Affiliate ID** field for details on the affiliate.
   - Click an **Order Number** field for details on an affiliate order.
   - Click a **Return ID** field for details on a returned affiliate order.

Note: Beginning on 4/26/2011, we have temporarily enabled estimated costing information (your profit and our commission) for our on-screen reports. This short-term change will allow us to complete some enhancements to Business Intelligence and Business Navigator reports.

Using Tracking IDs

eSellerate's tracking ID option makes it easy to track the activity of SKUs you release for special purposes—such as a sales campaign. Just create an ID, associate it with the sale of a specific SKU and track the results in the SKU Sales by Date Range report. (For details, see "SKU Sales by Date Range" on page 167.)

To implement a tracking ID:

The tracking ID can be any alphanumeric name you choose, up to a 100-character limit. How you implement the ID depends on the eSeller.

- For Integrated and Embedded Web Store eSellers, pass the ID in the trackingID parameter of the Purchase function call.
- For Web Store eSellers, add the tracking ID to the end of any "Buy" URLs used on your web site or distributed to your sales partners. The required format is "&PT=" followed by tracking ID.

Running Payment Reports

The Payment Reports page provides access to the following reports:

- Future Payment (runs the Transaction Ledger sales report and lists "All Unpaid Items")
- "Payments" below

Payments

Note: The information that is available through this report does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

The Payments report provides the following payment information:

- Payments due, which are payments for which a voucher has been created, but payment has not yet been made
- Payment history

Note: To search for transactions that are not yet associated with a payment, run the Transaction Ledger sales report with **All Unpaid Items** selected as the **Transaction List Criteria**. (See "Transaction Ledger" on page 172.)

To run a Payments report:

1. Click the **Payments** tab. The Payment Reports page appears.
2. Click **Payments**. The Payments page will display all payment vouchers created in the past 12 months. (Payments due will list "Pending" as the payment date, which indicates that a voucher has been created, but payment has not yet been made.)
3. If vouchers exist for previous years, you can click **Show All Vouchers** to display them all.
4. For more information about a payment, click its **Payment ID** field. The resulting page will include a payment summary in the top section, and payment details in the bottom section. (See "Payment Detail Page" below.)

Payment Detail Page

Note: The information that is available on the Payment Detail page does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

The Payment Detail page displays when you run the Payments report and then click a **Payment ID** field to find more information about a specific payment. This page provides a payment summary in the top section, and payment details in the bottom section.

Options on this page include:

- If a net affiliate commission exists, you can click the provided link to see a breakdown of the affiliate names and commission amounts due for the payment. (See the note that follows.)
- If a net SplitPay amount exists, you can click the provided link to see a breakdown of the payee names and SplitPay amounts due for the payment. (See the note that follows.)
- In addition to the HTML table that displays at the bottom of the Payment Detail page by default, this report can return results as a tab-delimited file, a comma-delimited file or an XML file. To use one of the file export options, make a selection from the **Return Results As** list and then click **Run**.

- The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.
- You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Note: The top section of the Payment Detail page displays figures for Net Affiliate Commission and Net SplitPay Amount. When these figures apply for a given payment, they will display as negative amounts (except in some cases involving returned orders). The reason is that affiliate commissions and split payments are negative adjustments to the Net Payment figure, which is the amount of your publisher payment. However, if you click the underlined link for either figure, the resulting Details page will display the figures as positive amounts (except in some cases involving returned orders). This is because the Details page shows the figures from the perspective of the amount due to your sales partner(s), which will be a positive amount in most cases.

Running Admin Reports

The Admin Reports page provides access to these reports:

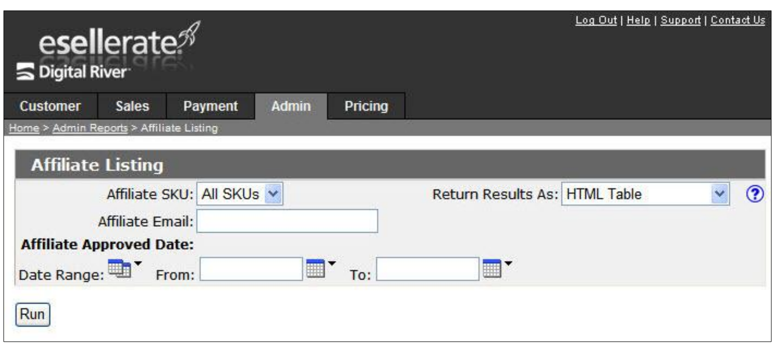
- "Affiliate Listing" below
- "Hosted eST Tracking" on the facing page
- "Bandwidth Usage" on page 187
- "CheckForUpdate Redirects" on page 187
- "Embedded Web Store CheckForUpdate Redirects" on page 188
- "SKU Redirects" on page 188
- "Serial Numbers" on page 188
- "Serial Number Activation Attempts" on page 190
- "Activation History Export" on page 190
- "Activation Failures Export" on page 191
- "Coupon Usage" on page 192
- "Login Attempts" on page 193

Affiliate Listing

You can use this report to find contact information for eSellerate Affiliates that you've approved to sell your products.

To run an Affiliate Listing report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Affiliate Listing**. The Affiliate Listing page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. If you would like your report to find affiliates that have sold specific SKUs, make your selection from the **Affiliate SKU** list. (You can only select SKUs that are currently available for affiliate sale.)
5. If you would like your report to find affiliates approved within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)

6. Click **Run**.

If you selected HTML table results:

The table will display all affiliates that matched your report criteria.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

See Also

"eSellerate Affiliates" on page 249

Hosted eST Tracking

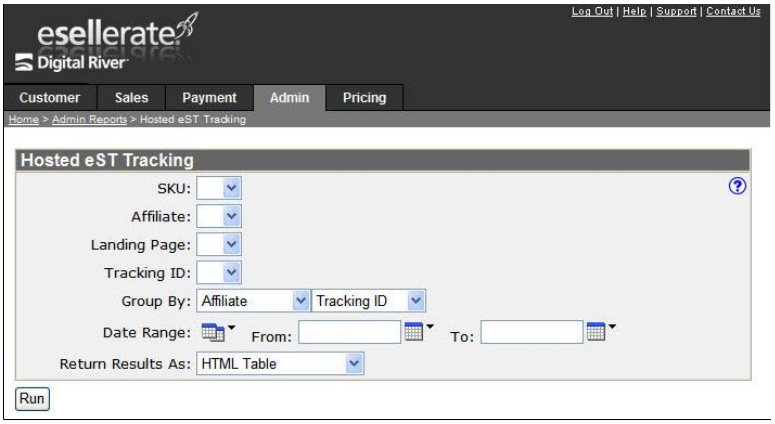
You can use this report to gauge the effectiveness of your marketing campaigns based on factors such as the number of Hosted eST downloads and Landing Page visits.

Notes

- This report does not provide statistics for standard eST downloads.
- The date range for this report is based on the dates of Landing Page visits and downloads. Because sales can occur on different dates than the initial visits, it is difficult to accurately match visits to sales.
- The Visits figure refers to visits to Landing Pages. eSellerate records one visit per session.
- The Downloads figure refers to successful downloads of Hosted eST files. These downloads can be from a Landing Page, or a direct link to the Hosted eST files. Also note:
  - If a line item includes one or more downloads and a Landing Page, then the downloads were from the specified Landing Page.
  - If a line item includes one or more downloads but no Landing Page, then the downloads were from a direct link to the Hosted eST file.
- The Visits to DL figure refers to the percentage of Landing Page visits that resulted in downloads.
- The DL to Sales figure refers to the percentage of downloads that resulted in sales.
- The Visits to Sales figure refers to the percentage of Landing Page visits that resulted in sales.

To run a Hosted eST Tracking report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Hosted eST Tracking**. The Hosted eST Tracking page appears.



3. If you would like to narrow the scope of your report to specific items such as one SKU or one tracking ID, make your selections from the lists provided.
4. The lists to the right of **Group By** are for controlling what displays in the first two columns of this report. Use the first list to set the first column, and the second list to set the second column.
5. If you would like your report to find statistics within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
6. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
7. Click **Run**.

If you selected HTML table results:

The table will display all statistics that matched your report criteria. If you grouped the results by any criterion other than none, some of the fields will display links that you can use to find more information.

Note: When Landing Page is displaying for either of the first two columns, links will display only for Landing Pages that still exist in your account. If you have deleted the Landing Page, or if it is the EZ Landing Page, the name will display as static text.

Click any of the underlined column headings to sort your results by that criterion. You can then click the heading a second time to switch the sorting between ascending order and descending order.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

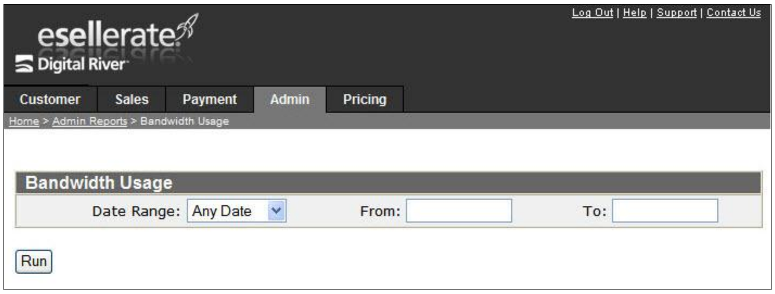
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Bandwidth Usage

This report shows how much bandwidth is being used for downloads from your eSellerate stores.

To run a Bandwidth Usage report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Bandwidth Usage**. The Bandwidth Usage page appears.



3. Use the **Date Range** list to narrow the scope of your report, if desired. You can also edit or enter dates in the **From** and **To** fields.
4. Click **Run**. This will display your bandwidth usage for the specified date range.
5. For more information about downloads on a specific date, click the appropriate **Date** field.

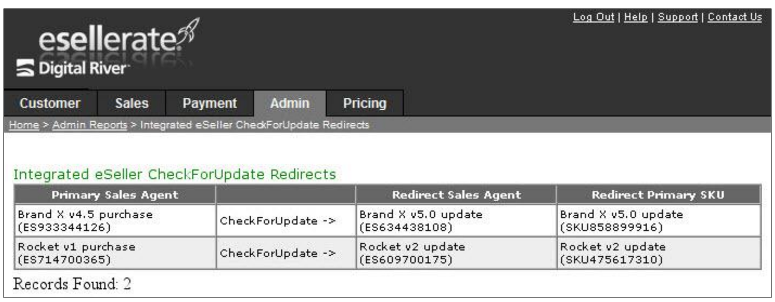
Note: In general, there is no extra charge for bandwidth if most of your downloads involve a sale. eSellerate will compare your bandwidth usage against credits that you earn with each sale. To see a snapshot of your current bandwidth credit-versus-usage, run the Future Payment report.

CheckForUpdate Redirects

This report shows all the Integrated eSeller check for update redirect relationships set up for your eSellerate account.

To run a CheckForUpdate Redirects report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **CheckForUpdate Redirects**. The resulting page displays redirect information, as in the example below.



See Also

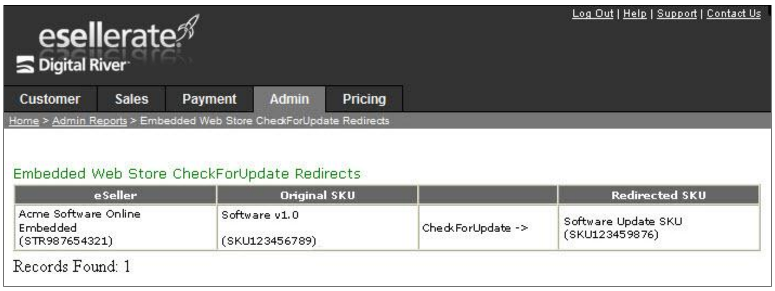
"Integrated eSeller: CheckForUpdate Redirect" on page 344

Embedded Web Store CheckForUpdate Redirects

This report shows all the Embedded Web Store eSeller check for update redirect relationships set up for your eSellerate account.

To run an Embedded Web Store CheckForUpdate Redirects report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Embedded Web Store CheckForUpdate Redirects**. The resulting page displays redirect information, as in the example below.



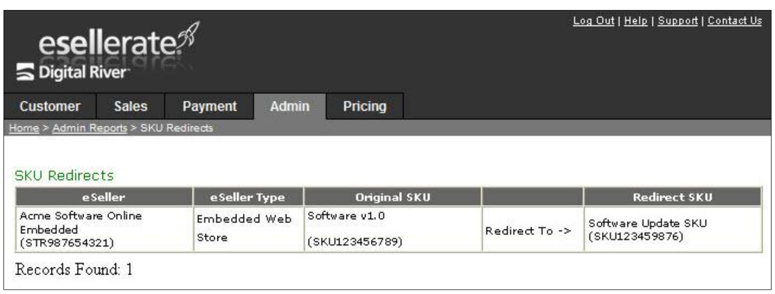
For information on setting the check for update behavior for Embedded Web Store SKUs, see "Adding Embedded Web Store SKUs" on page 323.

SKU Redirects

This report shows all the SKU redirects set up for your eSellerate account.

To run a SKU Redirects report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **SKU Redirect**s. The resulting page displays redirect information, as in the example below.



For information on setting SKU redirect behavior, see "Adding Embedded Web Store SKUs" on page 323 and "Adding Web Store SKUs" on page 364.

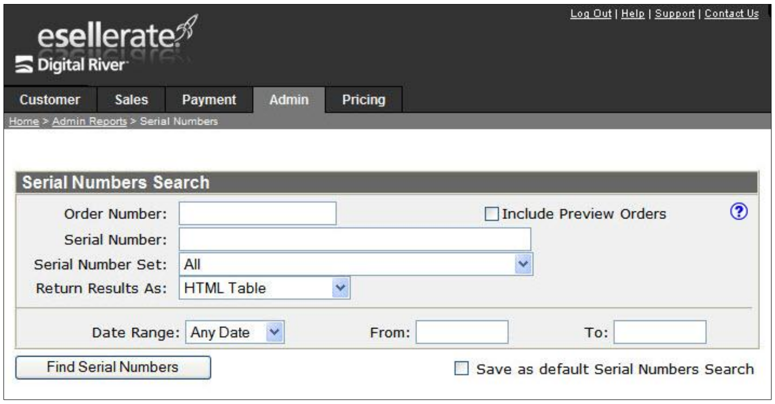
Serial Numbers

The Serial Numbers report can produce listings of any serial numbers issued for your products through the eSellerate system. These listings may include serial numbers issued for existing and deleted products.

You can also use this report to find serial numbers that you imported in order to use eSellerate Product Activation with products sold outside the eSellerate system, or manually generated from within a Standard or Standard Enhanced serial number set. (See "Importing External Serial Numbers for Activation" on page 98 and "Manually Generating Serial Numbers" on page 88.)

To run a Serial Numbers report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Serial Numbers**. The Serial Numbers page appears.



3. To narrow the scope of this report, you can do any of the following:
   - Enter an order number or a serial number, but not both. The **Order Number** field requires a complete order number. The **Serial Number** field will accept a partial serial number for a "begins with" search, and is case-insensitive.
   - Select a serial number set, which will limit the results to serial numbers that were issued for that set.
   - Use the **Date Range** list to limit the results to serial numbers that were issued within a specific date range. You can also edit or enter dates in the **From** and **To** fields.
4. If appropriate, select the **Include Preview Orders** check box.
5. This report can return results as an HTML table, a tab-delimited file or a comma-delimited file. Make your selection from the **Return Results As** list.
6. Click **Find Serial Numbers**.

If you selected HTML table results:

The table will display all serial numbers that matched your report criteria. You can now find more information about serial numbers and/or the associated orders.

- Click a **Serial Number** field for details on Product Activation.
- Click an **Order Number** field for details on an eSellerate order. If a serial number does not have a corresponding Order Number field, it may be because that serial number was imported for Product Activation purposes, or manually generated from within a Standard or Standard Enhanced serial number set.

Note: The order and return information that is available through this report does not include your profit or eSellerate's commission on your orders from 4/1/2011 and later. To find that information and more, please use Business Intelligence reporting. See "Business Intelligence Reporting" on page 164.

If you selected tab-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".txt" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (Because this is a basic text file, you may need to specify that the data is in tab-delimited format.)

If you selected comma-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".csv" before saving the file (applies to both Windows and Macintosh platforms).

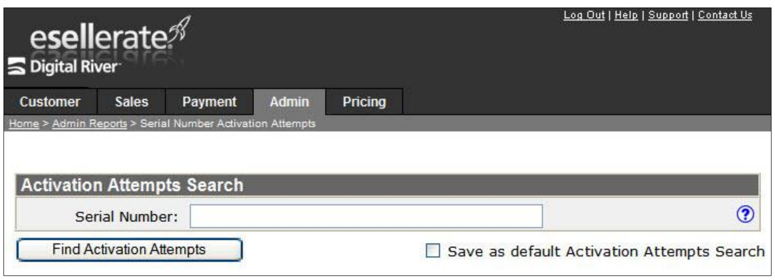
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (If a program prompts you to specify a format for this data, select comma-delimited or comma-separated values.)

Serial Number Activation Attempts

This report will show all successful and failed activation attempts for a serial number.

To run a Serial Number Activation Attempts report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Serial Number Activation Attempts**. The Serial Number Activation Attempts page appears.



3. In the Serial Number field, enter a complete serial number. The search is case-sensitive.
4. Click **Find Activation Attempts**.

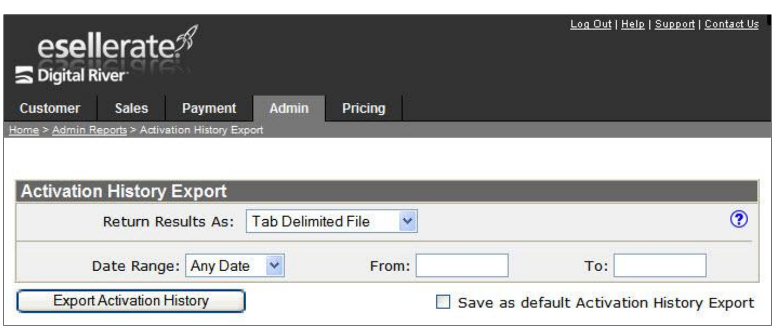
Note: The "Activation Count" figure included in this report represents all successful activations for the serial number. The figure does not necessarily represent new, unique activations that would count against the total allowed activations. To find that type of information, see the serial number's Activation Details page. (See "Activation Details Page" on page 109.)

Activation History Export

As a complement to the Serial Number Activation Attempts report—which shows activation history for one serial number at a time—this report allows exporting activation history for all your serial numbers at once.

To run an Activation History Export:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Activation History Export**. The Activation History Export page appears.



3. This report can return results as a tab-delimited file or a comma-delimited file. Make your selection from the **Return Results As** list.
4. Use the **Date Range** list to narrow the scope of your report, if desired. You can also edit or enter dates in the **From** and **To** fields.
5. Click **Export Activation History**.

If you selected tab-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".txt" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (Because this is a basic text file, you may need to specify that the data is in tab-delimited format.)

If you selected comma-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".csv" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (If a program prompts you to specify a format for this data, select comma-delimited or comma-separated values.)

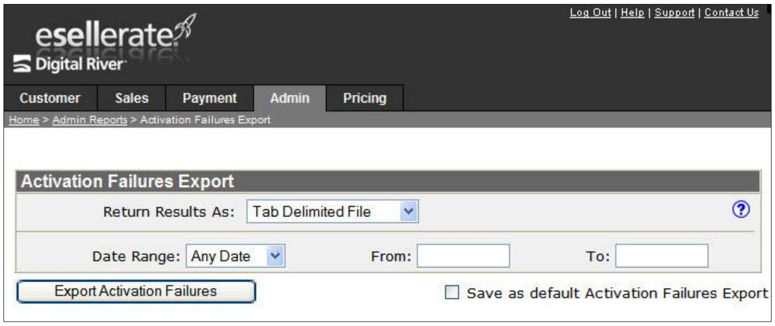
Note: The "ACTIVATION_COUNT" figures included in this report represent all successful activations for the respective serial numbers. The figures do not necessarily represent new, unique activations that would count against the total allowed activations. To find that type of information, see the serial number's Activation Details page. (See "Activation Details Page" on page 109.)

Activation Failures Export

As a complement to the Serial Number Activation Attempts report—which shows activation attempt failures for one serial number at a time—this report allows exporting activation failures for all your serial numbers at once.

To run an Activation Failures Export:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Activation Failures Export**. The Activation Failures Export page appears.



3. This report can return results as a tab-delimited file or a comma-delimited file. Make your selection from the **Return Results As** list.
4. Use the **Date Range** list to narrow the scope of your report, if desired. You can also edit or enter dates in the **From** and **To** fields.
5. Click **Export Activation Failures**.

If you selected tab-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".txt" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (Because this is a basic text file, you may need to specify that the data is in tab-delimited format.)

If you selected comma-delimited file results:

The resulting Save As dialog will display a default file name, which you can change if desired. In any case, you will need to change the file extension to ".csv" before saving the file (applies to both Windows and Macintosh platforms).

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel. (If a program prompts you to specify a format for this data, select comma-delimited or comma-separated values.)

> **Note:** The "ACTIVATION_COUNT" figures included in this report represent all successful activations for the respective serial numbers. The figures do not necessarily represent new, unique activations that would count against the total allowed activations. To find that type of information, see the serial number's Activation Details page. (See "Activation Details Page" on page 109.)

Coupon Usage

You can use this report to find the following information about coupon usage:

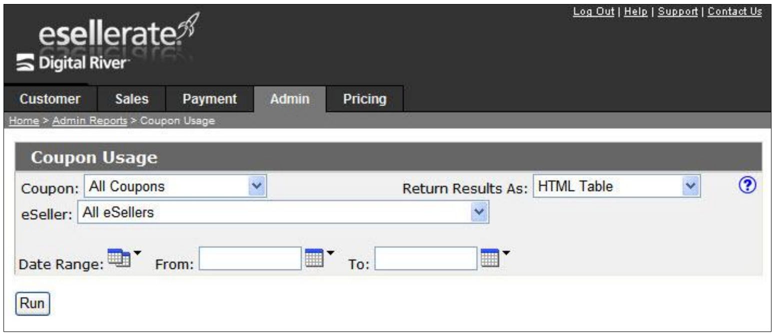
- The number of times a coupon has been used
- The total discounts that the coupon provided
- The total sales for orders that involved the coupon

Notes

- This report can return information about coupons that have Active or Inactive statuses. The report can also account for coupons that have Preview status, if the coupons were once Active, and then set back to Preview for editing.
- This report does not include preview orders.
- Returned orders do not affect the figures in this report.

To run a Coupon Usage report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Coupon Usage**. The Coupon Usage page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. If you would like your report to find coupon usage for a specific coupon, make your selection from the **Coupon** list.
5. If you would like your report to find coupon usage for a specific eSeller, make your selection from the **eSeller** list.
6. If you would like your report to find coupon usage within a specific date range, do one of the following to complete the **From** and **To** date fields:
    - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
    - Edit or enter dates in the fields.
    - Right-click in each field, and then select from a list of common dates.
    - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
7. Click **Run**.

If you selected HTML table results:

The table will display all coupon usage that matched your report criteria.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

See Also

"Creating Coupons" on page 242

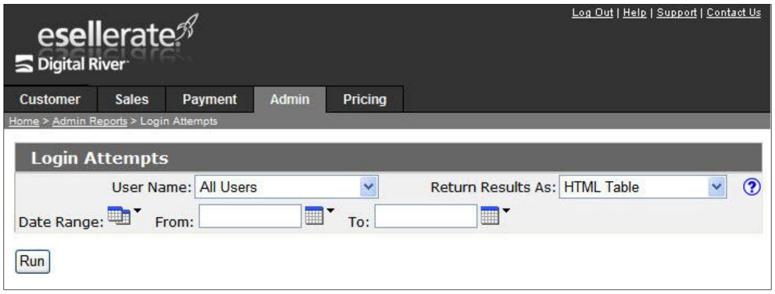
Login Attempts

This report complements the permissions manager, which is an option that allows multiple users with varying levels of permissions to manage the same account. (See also "User Management" on page 311.) You can use this report to find the following information about each user's login attempts:

- Login date and time
- IP address of the computer the user used to log in
- The result — either SUCCESS or INVALID_PASSWORD

To run a Login Attempts report:

1. Click the **Admin Reports** tab. The Admin Reports page appears.
2. Click **Login Attempts**. The Login Attempts page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. If you would like your report to find login attempts for a specific user, make your selection from the **User Name** list.
5. If you would like your report to find login attempts within a specific date range, do one of the following to complete the **From** and **To** date fields:
   - Click the calendar graphic to the right of **Date Range**, and then select from a list of common date ranges.
   - Edit or enter dates in the fields.
   - Right-click in each field, and then select from a list of common dates.
   - Click the calendar graphic to the right of each field, and then select a date from a calendar interface. (See "Selecting a Date from the Calendar Interface" on page 199.)
6. Click **Run**.

If you selected HTML table results:

The table will display all login attempts that matched your report criteria.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Running Pricing Reports

The Pricing Reports page provides access to the following reports:

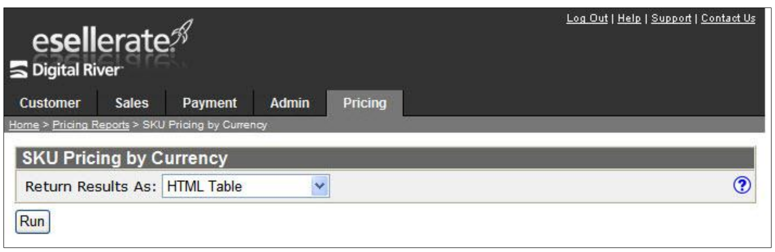
- "SKU Pricing by Currency" below
- "Volume Discount by Currency" below
- "Cross-Sell Discount by Currency" on next page
- "Coupons by Currency" on page 197
- "Up-Sell Discount by Currency" on page 197

SKU Pricing by Currency

This report supplements the SKU Pricing feature, which allows you to set pricing in any currency that eSellerate supports. (See also "Setting Native Currency Pricing for SKUs" on page 68.)

To run a SKU Pricing by Currency report:

1. Click the **Pricing** tab. The Pricing Reports page appears.
2. Click **SKU Pricing by Currency**. The SKU Pricing by Currency page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. Click **Run**.

If you selected HTML table results:

The table will display pricing information for all SKUs in your eSellerate account.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

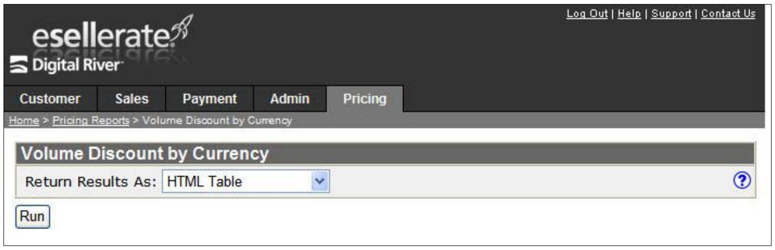
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Volume Discount by Currency

This report supplements the Volume Discount Pricing feature, which allows you to set pricing in any currency that eSellerate supports. (See also "Setting Native Currency Pricing for Volume Discounts" on page 69.)

To run a Volume Discount by Currency report:

1. Click the **Pricing** tab. The Pricing Reports page appears.
2. Click **Volume Discount by Currency**. The Volume Discount by Currency page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. Click **Run**.

If you selected HTML table results:

The table will display pricing information for all volume discount sets in your eSellerate account.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

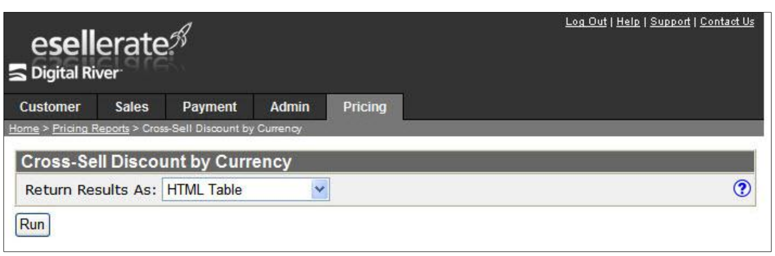
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Cross-Sell Discount by Currency

This report supplements the Cross-Sell Discount Pricing feature, which allows you to set pricing in any currency that eSellerate supports. (See also "Setting Native Currency Pricing for Cross-Sell SKUs" on page 69.)

To run a Cross-Sell Discount by Currency report:

1. Click the **Pricing** tab. The Pricing Reports page appears.
2. Click **Cross-Sell Discount by Currency**. The Cross-Sell Discount by Currency page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. Click **Run**.

If you selected HTML table results:

The table will display pricing information for all cross-sell SKU groups in your eSellerate account.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

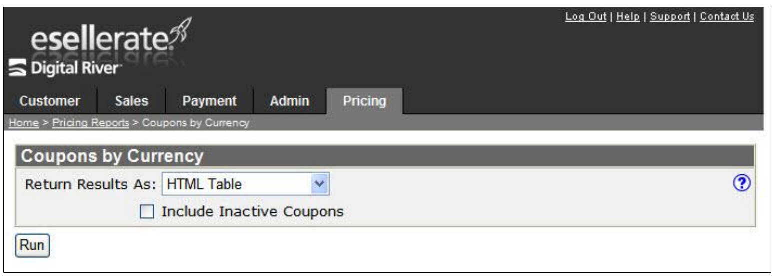
Coupons by Currency

This report supplements the Coupon Pricing feature, which allows you to set pricing in any currency that eSellerate supports. (See also "Setting Native Currency Pricing for Coupons" on page 70.)

Note: A coupon that is set up with a percentage-based discount, and no minimum order amount, will not appear in this report because no currency information applies.

To run a Coupons by Currency report:

1. Click the **Pricing** tab. The Pricing Reports page appears.
2. Click **Coupons by Currency**. The Coupons by Currency page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. If desired, select the **Include Inactive Coupons** check box.
5. Click **Run**.

If you selected HTML table results:

The results will include two tables: one for listing coupon amounts by currency, and another for listing minimum order amounts by currency.

Note: To appear in both tables, a coupon would need to be set up with a dollar-based discount, and a minimum order amount.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

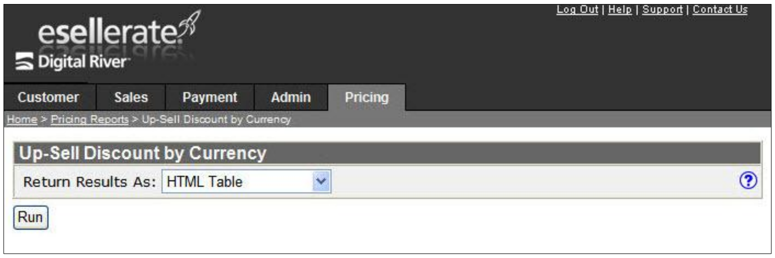
You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Up-Sell Discount by Currency

This report supplements the Up-Sell Discount Pricing feature, which allows you to set pricing in any currency that eSellerate supports. (See also "Setting Native Currency Pricing for Up-Sell SKUs" on page 71.)

To run an Up-Sell Discount by Currency report:

1. Click the **Pricing** tab. The Pricing Reports page appears.
2. Click **Up-Sell Discount by Currency**. The Up-Sell Discount by Currency page appears.



3. This report can return results as an HTML table, a tab-delimited file, a comma-delimited file or an XML file. Make your selection from the **Return Results As** list.
4. Click **Run**.

If you selected HTML table results:

The table will display pricing information for all up-sell SKU groups in your eSellerate account.

If you selected comma-delimited, tab-delimited or XML file results:

The resulting Save As dialog will display a default file name, which you can change if desired. (The default file extension should be correct for your chosen format.) When you're finished making any changes to the file name, save the file.

You can now import the file into a database, or open it in a spreadsheet program such as Microsoft Excel.

Selecting a Date from the Calendar Interface

Some eSellerate reports allow you to select a date range through a calendar interface. This feature is available whenever calendar graphics appear to the right of the **From** and **To** fields, as shown in the following example.

To use the calendar interface, do the following for each date field (From and To):

1. Click the calendar graphic to the right of the field. This will display the calendar interface.
2. Do one of the following to select the desired month and year:
   - Right-click anywhere in the calendar, and then select from a list of navigation options.
   - Click the left arrow to select the previous month, or click the right arrow to select the next month.
   - Click the month and year heading at the top of the calendar. This will display an interface for selecting a different month and year. When you're finished, click **OK**.
3. If needed, click the desired day to select it.

Chapter 8 - Advanced Sales Options

The Advanced Sales Options section of the eSellerate Sales Manager is for accomplishing the following tasks:

- "Setting Up Subscription-Based Licensing" on next page
- "Configuring eCD" on page 219
- "Creating Up-Sells" on page 233
- "Creating Cross-Sells" on page 238
- "Creating Coupons" on page 242
- "Creating Volume Discounts" on page 246

Setting Up Subscription-Based Licensing

For publishers wanting to provide their customers with an alternative to paying a lump sum for products and services, eSellerate offers a full-featured subscriptions model.

Information on subscriptions appears here as follows:

- "Getting Started: About Subscriptions Page" below
- "Overview of Subscriptions" below
- "Notes on Subscriptions" on the facing page
- "Creating Subscription Methods" on page 207
- "Subscriptions: Details" on page 208
- "Subscriptions: Terms" on page 212
- "Subscriptions: E-mails" on page 213
- "Subscriptions: Usage" on page 213
- "Subscription Examples" on page 214
- "Canceling and Returning Subscriptions" on page 215
- "Cancel Subscription API" on page 216
- "Allowing Change of Quantity" on page 217

Getting Started: About Subscriptions Page

For information on the benefits of this option, go to the Advanced Sales Options section on the home page of the eSellerate Sales Manager and click **About Subscriptions**. (This link will change after you click through the About Subscriptions page.) When you finish reading the information, click **Continue**. You will then be able to use subscriptions in your publisher account.

> **Note:** Once you click through the About Subscriptions page, it will no longer display for your publisher account. However, you can view the page at any time through this link (after logging in if needed): https://publishers.esellerate.net/Admin/Editors/Subscriptions/AboutSubscriptions.asp?hidebtn=1

Overview of Subscriptions

eSellerate subscriptions provide another way for you to sell your software, by giving your customers a choice between a one-time purchase and recurring billings. You determine how often your customers are billed for the subscriptions, with billing frequencies (in days, weeks, months or years) ranging from 7 days to 3 years. You also determine the number of billings, which can be unlimited ("until cancellation") or a set number. The duration, which is the period of time the subscription service is available before it requires a renewal, cannot exceed 3 years/36 months.

Renewals come due at the end the predetermined number of billings. A renewal can be automatic, so that the customer doesn't have to do anything to start another subscription term, or manual, so that the customer must take action to renew the subscription, or else it expires.

Depending on how you set up your renewal options, your customers may be able to renew into the same subscription, start a different subscription, or purchase a non-subscription SKU for a lump sum.

To start selling a product or service through a subscription model, you will first create a subscription method. This involves setting billing frequency, number of billings and renewal policy. An example is a subscription billed monthly for 12 months, and using an automatic renewal policy, which means the subscription renews automatically at the end of the duration unless the customer cancels. Other options for the subscription method include:

- Generating a serial number for each renewal
- Allowing customers to change the quantities of active subscriptions
- Adding your own text to accompany the subscription terms and conditions that your online stores will display for the subscription
- Providing text for the renewal reminder e-mails to promote up-sells from subscriptions that are trials

Once you have set up the subscription method, you can assign it to a SKU. You will need to make sure that the SKU name and description clearly represent the SKU to your customers as a subscription. You will also need to set pricing. Each subscription billing will be for the full SKU price, plus additional charges as needed for shipping, taxes and eCD. Another consideration is your method of restricting subscription usage to current subscribers only. (We suggest using eSellerate Product Activation.) Finally, you can specify the SKUs that are offered to the customer at the subscription renewal. This may include setting the default SKU, which is the SKU that will be used for automatic renewals if the customer does not choose a different one.

You can sell the subscription SKU through any of your Web Store or Embedded Web Store eSellers. When customers select the SKU for purchasing, they will need to agree to the subscription terms and conditions. The customer will be charged for the initial purchase, and then automatic charges can occur during the duration, according to the predetermined number of billings. These billings during the duration are known as recurring or frequency billings. There are no recurring billings for "until cancellation" subscriptions, because those subscriptions renew with each billing. (They're basically equivalent to setting number of billings to 1, and the renewal policy to automatic renewal.)

eSellerate will send notifications to the customer for various subscription events. These notifications include renewal reminders sent prior to expiration, expiration notices sent after expiration (manual renewals only) and reminders of each billing that occurs during the subscription duration.

Your customers will manage their subscriptions through the eSellerate After-Purchase Services web site (http://store.esellerate.net/support), where they can update their billing information, renew or cancel subscriptions, and change subscription quantities (if you allow such changes). Customers purchasing a renewal may have the option to choose the same SKU and subscription, a different SKU and subscription, or a non-subscription SKU. They also can choose to have their renewal choice take effect right away, or at the next scheduled billing (to make full use of the time already purchased for the current subscription).

If the customer cancels a subscription or lets it expire (manual renewals only), eSellerate updates the subscription status to either canceled or expired, and deactivates the serial number associated with that subscription. Assuming you have set up your product to periodically verify subscription status, the customer should no longer be able to access the subscription services. (For a cancellation, eSellerate waits until the end of the current billing period before updating the subscription status to canceled, and deactivating the associated serial number.)

Notes on Subscriptions

This option allows you to provide a product or service according to a subscription model.

Availability

- Subscriptions are an option for Web Store eSellers (with Custom Layouts or Standard Layouts) and Embedded Web Store eSellers only.

Subscription Settings

- You determine how often your customers are billed for the subscriptions, with billing frequencies (in days, weeks, months or years) ranging from 7 days to 3 years. You also determine the number of billings, which can be unlimited ("until cancellation") or a set number. The duration, which is the period of time the subscription service is available before it requires a renewal, cannot exceed 3 years/36 months.
- The count for number of billings includes the initial purchase.

- There are two types of renewal policies:
  - Automatic renewal – The subscription renews automatically at the end of the set duration, unless the customer cancels. No action is required on the part of a customer wishing to renew.
  - Manual renewal – The customer must take action to renew the subscription, or else it expires at the end of the set duration.
- For both types of renewal policies, billings can occur throughout the duration, according to the subscription settings. For example, if the billing frequency is every 1 month and the number of billings is 12, there will be a charge to the customer's payment method for the initial purchase, followed by a charge every month for the next 11 months. This billing process repeats for each renewal.
- There are no recurring billings during the duration of "until cancellation" subscriptions, because those subscriptions renew with each billing. (They're basically equivalent to setting number of billings to 1, and the renewal policy to automatic renewal.)
- You have the option to generate a new serial number for renewals, when applicable to the subscription SKU.
- If you would like your customers to be able to use their subscriptions for a set period of time after the expiration, you can set a grace period of up to 99 days. (Grace period applies to manual renewals only.)
- If you set up a subscription to allow changing the quantity, your customers will be able to increase or decrease the quantity at any time while the subscription is active. For more information, including details on how eSellerate adjusts the charges for a change of quantity, please see "Allowing Change of Quantity" on page 217.
- Once you activate a subscription method, you cannot edit it. You do have the option to change the subscription method and pricing for a given SKU, but this will not affect existing subscriptions until renewal time. The renewal reminder e-mail will show customers their current subscription information, followed by information about the renewal.

SKU Settings

- Once you have set up a subscription method, you can assign it to a SKU. The option for assigning a subscription method is available on the Advanced tab of the SKU Detail page.
- You can specify the SKUs that are offered to the customer at the subscription renewal. This may include setting the default SKU, which is the SKU that will be used for automatic renewals if the customer does not choose a different one. Renewal options are set on the Renewal tab of the SKU Detail page.
- Subscription pricing is determined by the price of the SKU using the subscription. Each subscription billing is for the full SKU price, plus additional charges as needed for shipping, taxes and eCD.
- The price for a subscription SKU can be $0, or $4.95 USD or greater.
- Customers are required to enter their payment information when ordering $0 subscription SKUs. Having that payment information on record allows eSellerate to charge the customers when they choose different (greater than $0) SKUs for automatic renewals.
- As with anything that you sell through eSellerate, you can set pricing for subscriptions in non-USD currencies by using the Native Currency Pricing (NCP) option.
- Subscription SKUs can allow multi-quantity sales.
- Shipping is allowed in conjunction with subscription SKUs. Publishers will receive a notice of shipping requirements for each billing that occurs during the subscription duration. (See also the information about subscription start dates, at the end of these notes.)

eSeller SKUs

- When you add a subscription SKU to an eSeller, be sure to also add all the additional SKUs that you are going to be offering at subscription renewal. This would be all the SKUs listed on the SKU's Renewal tab, in the SKUs Offered at Subscription Renewal section.

License Enforcement

- You can use eSellerate Product Activation to restrict subscription usage to current subscribers only. For example, you can use the ActivateSerialNumber API to activate a serial number for a new subscription, and reactivate/verify activation on a regular basis. (There are no special activation calls related to subscriptions. The standard calls can be applied to subscription models.)

Payment Options

- Payment is by credit card, PayPal or e-check (ACH). In special circumstances, payment can also be by purchase order or international wire. These special circumstances are when the following conditions are true for all subscriptions in the shopping cart:
  - The renewal policy is manual renewal.
  - The duration and billing frequency are such that no recurring billings occur during the duration of the subscription. For example, if the duration is 12 months, the billing frequency must be every 12 months so there are no charges other than at the beginning of the subscription period, and optionally at the end of the period, if the customer manually renews.
- When payment is by purchase order or international wire, the orders start out in a pending state—customers don't receive serial numbers or download links at the time of purchase. Customers are granted access to all their order items after the purchase order is received and approved, or the wire payment is received. (See also the information about subscription start dates, at the end of these notes.)

Custom Layouts

- eSellerate variables used in default Custom Layouts to enable subscription functionality include:
  - _Cart.IsCreditCardRequired – Boolean that will be true if the shopping cart contains at least one SKU that requires the customer to enter payment information
  - _Cart.HasSubscriptionSku – Boolean that will be true if the shopping cart contains at least one subscription SKU
  - _Sku.TermsOfSubscriptionText – String containing the subscription terms and conditions text for the selected SKU

Subscription Orders

- eSellerate provides a number of automatic notifications to keep customers informed of the status of their subscriptions. These notifications include renewal reminders sent prior to expiration, expiration notices sent after expiration (manual renewals only) and reminders of each billing that occurs during the subscription duration.
- Customers manage their subscriptions through the eSellerate After-Purchase Services web site (http://store.esellerate.net/support), where they can update their billing information, renew or cancel subscriptions, and change subscription quantities (if you allow such changes). Customers purchasing a renewal may have the option to choose the same SKU and subscription, a different SKU and subscription, or a non-subscription SKU. They also can choose to have their renewal choice take effect right away, or at the next scheduled billing (to make full use of the time already purchased for the current subscription).

- When a subscription is canceled through After-Purchase Services, eSellerate sends an e-mail notification to the publisher and the customer. We include you (the publisher) in these notifications to keep you informed when your customers cancel their subscriptions themselves.
- After-Purchase Services does not allow customers to change their shipping address for subscriptions, because a different address could affect the pre-defined shipping charges.
- When customers update their credit card information through After-Purchase Services, the following message is displayed: "NOTE: To verify the credit card that you just provided, we have placed an authorization on the card. Your credit card billing will show an authorization from WWW.ESLR8.COM in the amount of <price>, which is the base price of <product>. This authorization is not a charge to your card, and it will eventually expire. The length of time before an authorization expires depends on the policy of the issuing bank."
- If a notification is returned as undeliverable, eSellerate will place the subscription in a suspended status, and notify you via e-mail. It is then your responsibility to contact the customer to obtain a valid e-mail address, and update the subscription information.
- Customers purchasing a subscription must agree to subscription terms and conditions, which are separate from any terms of sale that might apply. eSellerate sets the subscription terms and conditions. You have the option to provide additional text to accompany the pre-defined content.
- Coupons apply to the initial subscription purchase only. The coupon discounts do not affect billings that occur during the duration of the subscription.
- There can be instances in which payment information is required even when a coupon reduces the subscription price to $0. Payment information is required whenever there will be future billings, such as for an automatic renewal.
- In the case of affiliate sales, affiliates receive credit for the initial subscription purchase and all billings that occur during the first duration. Affiliates do not receive credit for subscription renewals.
- SplitPay payees receive credit for every subscription billing, including renewals and subsequent durations. The payees will receive credit as long as the subscription SKU remains set up for split payments.
- Each billing during the duration of a subscription will have its own order ID. These IDs will be associated with the original order ID for reporting purposes.
- The following e-mail notifications include subscription information when applicable:
  - Order Confirmation e-mail sent to the customer
  - eSellerate Order Notice e-mail sent to the addresses specified for the per-transaction report (available through Account Information)
  - The automated daily summary report file (available through Account Information)
- Information on sales reports that include subscription information follows:
  - The SKU Sales by Date Range report can filter results by subscription.
  - The SKU Sales Summary report shows the number of new subscriptions, frequency billings and renewals for the selected SKU.
  - The Subscription SKU Sales Summary report shows sales by count or U.S. dollar amount, with the results broken down by year, quarter, or month.
  - The Daily Summary Export includes columns for subscription ID and subscription status.
- The Order Detail page lists subscription information when applicable.
- You can use preview orders to test various subscription events, such as e-mail notifications and XML posts for subscription changes. The options for testing subscription events are available on the Order Detail page when it's showing preview orders that involved subscriptions.
- The XML order notice (available through Account Information) lists subscription information when applicable for new orders, and provides individual posts for changes in subscription status.
- The possible statuses for subscriptions are ACTIVE, CANCELED, EXPIRED, PENDING CANCELATION, RENEWAL FAILED, RENEWED, SUSPENDED EXPIRED and SUSPENDED FAILED BILLING.

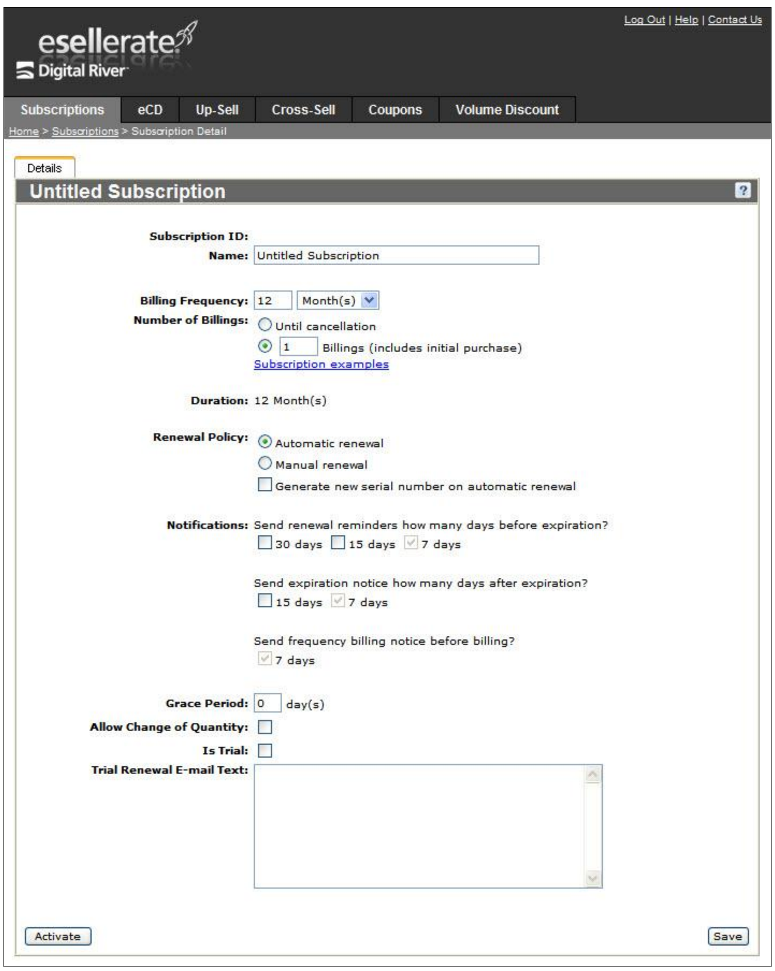
- Subscription services begin on the date of the initial purchase (with the exception noted below). The purchase date determines the renewal date, unless the purchase is on day 29, 30 or 31 of a given month, in which case the renewal date will be the first day of the next month.
    - The above statement is true even when payment is by purchase order or international wire.
    - When a customer purchases a subscription SKU that requires shipping, eSellerate waits to create a subscription record until you have marked the order as fulfilled. Therefore, the fulfillment date will determine the subscription start date.

Creating Subscription Methods

The steps for setting up subscription-based licensing include creating a subscription method, assigning the method to a SKU, and assigning the SKU to active Web Store or Embedded Web Store eSellers.

To create a subscription method:

1. Click the **Subscriptions** tab. The Subscriptions page appears.
2. Click **New**. The Subscription Detail page appears.



3. Follow the instructions provided at "Subscriptions: Details" on next page.
4. Click **Save**. (Do not click **Activate** at this point.) Notice that all four tabs of the Subscriptions page now display: Details, Terms, E-mails and Usage. The section that you just completed was the Basic tab.
5. Click the **Terms** tab.

6. Follow the instructions provided at "Subscriptions: Terms" on page 212.
7. Click **Save**.
8. Click the **Details** tab.
9. Click **Activate**. A confirmation dialog appears.
10. Click **OK**.

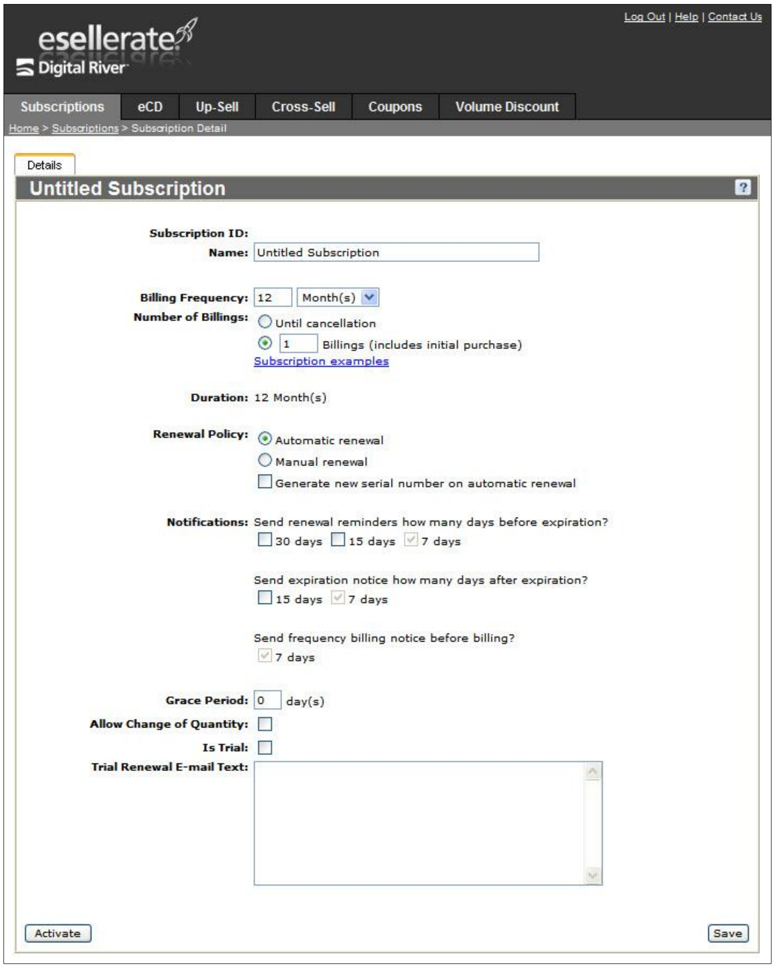
Next, you can assign the new subscription method to a SKU. The option of assigning a subscription method is available on the Advanced tab of the SKU Detail page. Once you have made that assignment, you can go to the Renewal tab to choose the SKUs that will be available at subscription renewal. You will also need to price the SKU, and enter a description that identifies the SKU as a subscription option. For more information, see the following topics:

- "Creating the SKU and Setting Its Basic Properties" on page 43
- "Setting the SKU's Advanced Properties (Optional)" on page 49
- "Setting the SKU's Renewal Properties (Optional)" on page 58

To start selling the subscription SKU, you will need to add it to one of your active Web Store or Embedded Web Store eSellers. For more information, see "Adding the SKU to Web Store or Embedded Web Store eSellers" on page 59.

Subscriptions: Details

The Details tab of the Subscription Detail page is for setting billing frequency, number of billings, renewal policy and other options as described here.



To set the subscription detail options:

> **Note:** Subscription ID is a non-editable value that appears after you save the subscription for the first time. This ID will not be visible to your customers. You will not need this ID for setting up your subscriptions, but you will need to refer to it if you use the XML order notice, which lists subscriptions by ID rather than name.

1. In the **Name** field, enter a name for this subscription (up to 50 characters). The name is for internal identification only, and will not be visible to your customers.

   > **Note:** Duplicate subscription names are allowed. However, there is no built-in way to differentiate between duplicate names when you assign a subscription method to a SKU, or select a subscription for a report.

2. How often do you want to bill the customer for this subscription? (The billing amount will be the price of the SKU using the subscription, plus additional charges as needed for shipping, taxes and eCD.) You can set the billing frequency in days, weeks, months or years. The shortest possible billing frequency is 7 days/1 week, and the longest is 36 months/3 years. Select either **Day(s)**, **Week(s)**, **Month(s)** or **Year(s)** from the list provided, and also enter a value to correspond to that selection.
3. Once you have set the billing frequency, you will need to specify the number of billings that should occur before the subscription is up for renewal. This can be a set number of billings, or the billings

can be unlimited ("until cancellation"), so that they continue with automatic renewals at the set billing frequency until the customer takes action to cancel the subscription.

To make the billings unlimited, select **Until Cancellation**. Otherwise, to specify a number of billings, select **Billings (Includes Initial Purchase)**, and then enter the desired number of billings.

> **Note:** The duration is the period of time the subscription service is available before it requires a renewal. Duration cannot exceed 3 years/36 months. For your convenience when you set up subscriptions, **Duration** appears as a non-editable field below the other related settings.

See also "Subscription Examples" on page 214.

4. The renewal policy determines what the customer has to do to renew the subscription at the end of the set duration. Your choices are as follows:
   - **Automatic Renewal** – Renew unless subscriber cancels
   - **Manual Renewal** – Renew upon subscriber's explicit request

> **Note:** If you're concerned about using an automatic renewal policy because your customers might not know they've purchased it, consider that there are multiple communications designed to make the policy transparent. First, there are the subscription terms and conditions that the customer must agree to before purchasing the subscription. Second, at least one renewal reminder will be sent to the customer prior to the subscription expiring (except with "until cancellation" subscriptions, which do not use renewal reminders.) These communications explain how automatic renewal works, including the need to cancel before the expiration date if the customer chooses not to renew.

5. For an automatic renewal policy, you can choose whether or not to generate a new serial number on renewal. Selecting the **Generate new serial number on automatic renewal** check box instructs eSellerate to generate a serial number, and deactivate the serial number that is associated with the most recent subscription purchase or renewal. This setting is effective only if there is a serial number set assigned to the subscription SKU.

> **Note**: Automatic renewals into a different SKU will always receive a new serial number, regardless of whether or not **Generate new serial number on automatic renewal** is selected.

> **Note:** If **Generate new serial number on automatic renewal** is selected and your setup allows automatic renewals into a different SKU, make sure that the serial number set for the renewal SKU does not require customer input. If a renewal occurs and the associated serial number set has **Prompt For** set to anything other than **None**, no serial number will be generated, and an error will occur.

> **Note:** For a manual renewal policy, eSellerate always generates a serial number on renewal, and deactivates the serial number that is associated with the most recent subscription purchase or renewal. This behavior applies only if there is a serial number set assigned to the subscription SKU.

6. (Skip this step if you're using "until cancellation" billings.) The **Notifications** settings apply to the e-mail messages that are automatically sent to customers who purchase the subscription.

   By default, a renewal reminder will be sent seven days before expiration, a frequency billing notice will be sent seven days before a frequency billing, and an expiration notice will be sent seven days after expiration. (Expiration notices are sent for manual renewals only.) If you would like your customers to receive additional notifications for this subscription, you can select up to four options:

   - Renewal reminder – 30 days before expiration
   - Renewal reminder – 15 days before expiration

- Expiration notice – 15 days after expiration

The optional notifications will be sent only when applicable. For example, once the customer renews a subscription, no more renewal reminders will be sent.

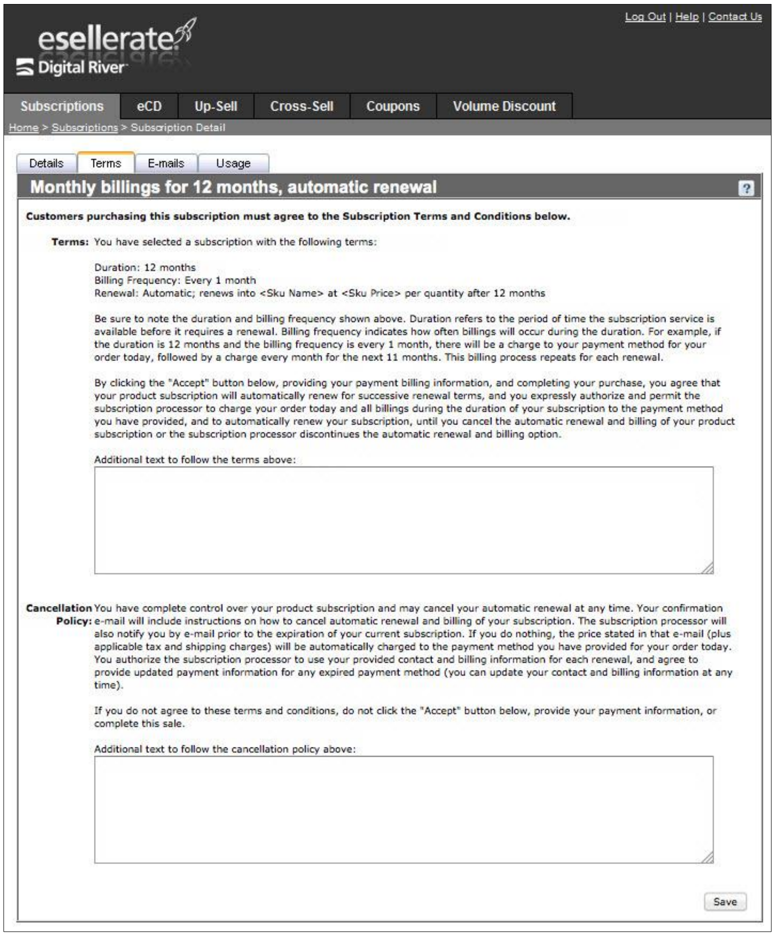
> **Note:** To view samples of the renewal reminder and the expiration notice, go to the E-mails tab of the Subscription page. See "Subscriptions: E-mails" on page 213.

7. Is this subscription a trial? If so, you have the option to include your own message about trials in the renewal reminder e-mails. As an example, you could use this option to give your customers reasons for renewing into a higher-priced product when the trial ends. To include your own trial renewal text, select the **Is Trial** check box. Then enter your text (plain text, up to 1,000 characters) in the **Trial Renewal E-mail Text** field.

> **Note:** Text that you enter here also will appear in the expiration notice e-mails.

8. The **Grace Period** setting is effective for manual renewal subscriptions only. If you would like to allow your customers to use their subscriptions for a set period of time after the expiration, you can enter a value of up to 99 days here. Whether you use the default value of zero days or some other value, eSellerate will do the following one day after the grace period ends:
   - Set the subscription status to expired
   - Deactivate the serial number associated with the subscription SKU, when applicable
9. By default, your customers will not be able to change the quantity of this subscription after they purchase it. If you would like them to be able to increase or decrease the quantity at any time while the subscription is active, select the **Allow Change of Quantity** check box. Your customers will then be able to change the quantity when managing their subscriptions in After-Purchase Services. For more information, including details on how eSellerate adjusts the charges for a change of quantity, please see "Allowing Change of Quantity" on page 217.
10. To save any changes that you have made on the Details tab, click **Save**. Clicking Save instead of Activate will allow you to modify and activate the subscription later.
11. Once you activate a subscription, you will not be able to modify it. If you are ready to activate this subscription, click **Activate**.

Subscriptions: Terms



The Terms tab of the Subscription Detail page shows the terms and conditions that customers must agree to before purchasing a SKU that uses the selected subscription method.

Note: If a subscription SKU has terms of sale assigned to it, those terms will display before the subscription terms and conditions. The customer must agree to all applicable terms before purchasing the subscription SKU. See also "Creating Terms of Sale" on page 158.

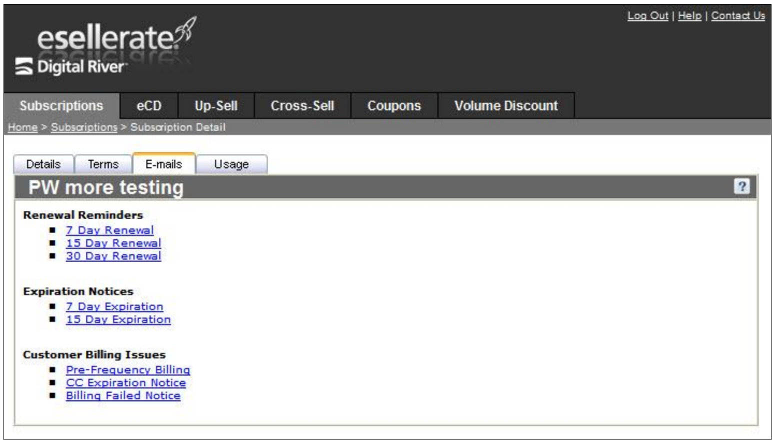
The static text shown on the Terms tab reflects the duration, billing frequency and renewal type (automatic or manual) that you have set for the subscription method on the Details tab. This content is non-editable. If you would like to provide additional text to supplement the non-editable content for terms and/or cancellation policy, enter it in the fields provided. These fields accept up to 4,000 characters each (plain text only). You can leave the additional text fields blank if desired.

Note: The static text shown on the Terms tab may include placeholders such as "<Sku Name>" for information that will be filled in at the time of purchase. The actual information will be visible when you run preview purchases to test your subscriptions.

When you finish entering additional text, click **Save**.

Note: Once you activate a subscription method, you will not be able to edit the additional text fields.

Subscriptions: E-mails



The E-mails tab of the Subscription Detail page provides links that you can click to view sample content for the e-mail notifications listed. These samples do not reflect any actual settings for the selected subscription method.

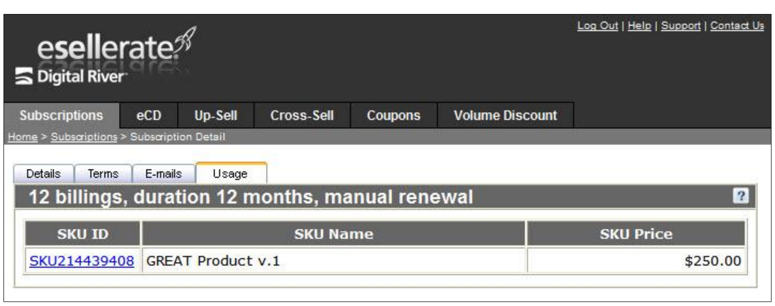
The samples for renewal reminders and expiration notices represent the automatic notifications that eSellerate sends to customers for certain subscription events. The "7 day" notifications are required (except with "until cancellation" subscriptions), and the others are optional. For more information on these notifications, see "Subscriptions: Details" on page 208.

You can also view samples of the notifications eSellerate sends to customers for certain billing topics. These samples include:

- Pre-Frequency Billing – When a subscription has billing frequencies that occur within the duration, such as monthly billings for a 12-month duration, eSellerate sends reminders to the customers seven days in advance of each billing.
- CC Expiration Notice – When a credit card on file for charging a subscription is about to expire, eSellerate notifies the customer (30 days in advance) and provides instructions on how to update the credit card information through eSellerate After-Purchase Services.
- Billing Failed Notice – When a billing for a subscription fails because of issues with the payment method, eSellerate notifies the customer and provides instructions on how to update the payment method information through eSellerate After-Purchase Services.

Note: You can use preview orders to test these e-mail notifications. If you're viewing a preview order that involved subscriptions, the Order Detail page will provide options for testing these e-mails and other subscription events. See "Subscription Events Testing – Preview Orders" on page 110.

Subscriptions: Usage



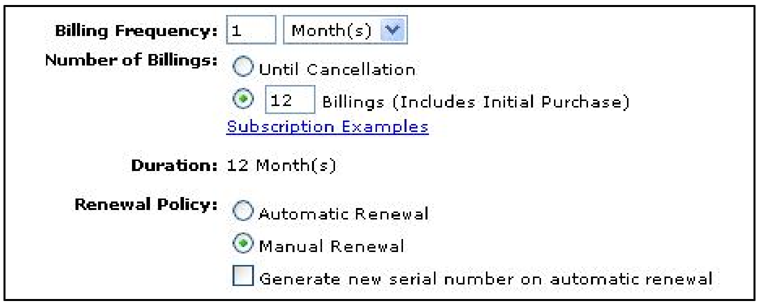
The Usage tab of the Subscription Detail page shows which SKUs use the selected subscription method. You can access the settings of any SKU listed by clicking the appropriate **SKU ID** field.

Note: The option of assigning a subscription method to a SKU is available on the Advanced tab of the SKU Detail page. See "Setting the SKU's Advanced Properties (Optional)" on page 49.

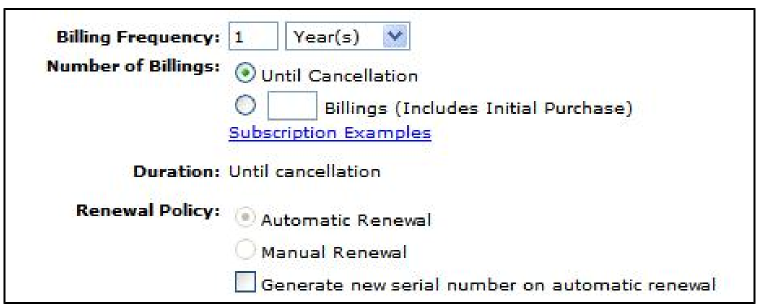
Subscription Examples

The main settings that determine a subscription's behavior are **Billing Frequency**, **Number of Billings** and **Renewal Policy**. The following examples show how you would configure the main settings for various subscription models.

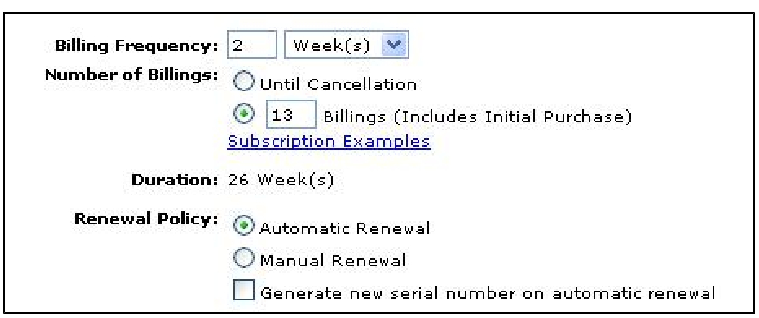
Monthly billings, with manual renewal after 12 months:



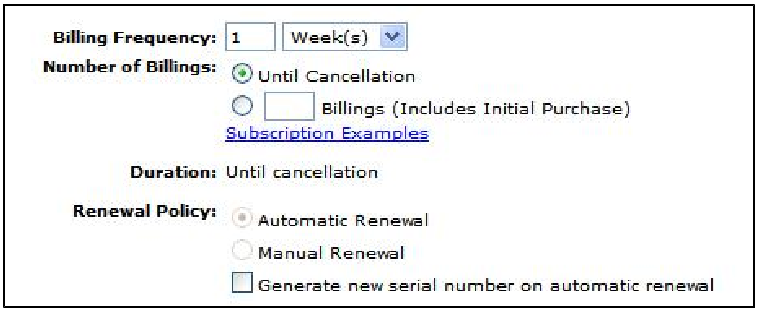
Annual billings, with no set expiration date (so renewal must be automatic):



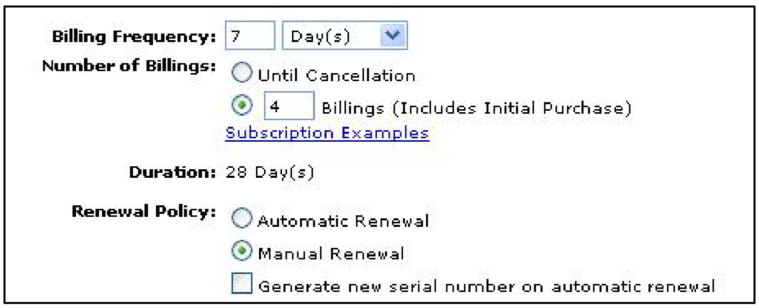
Billings every 2 weeks, with automatic renewal after 26 weeks:



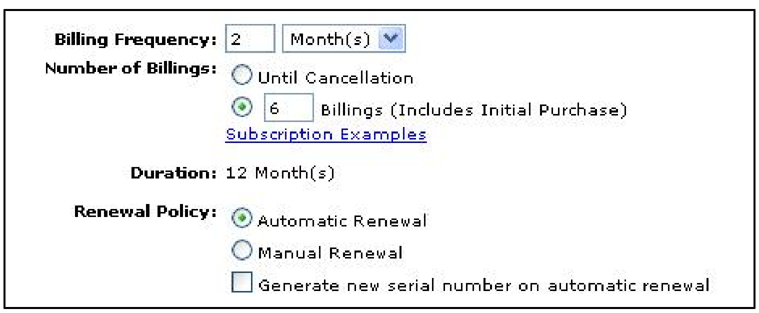
Weekly billings, with no set expiration date (so renewal must be automatic):



Billings every 7 days, with manual renewal after 28 days:



Billings every 2 months, with automatic renewal after 12 months:



See Also

"Subscriptions: Details" on page 208

Canceling and Returning Subscriptions

You can use the Returns editor to do any of the following in regard to subscription orders:

- Cancel a subscription for all quantities purchased in that particular order, without issuing a refund
- Issue a refund for an individual billing without canceling the subscription
- Issue a refund for an individual billing and cancel the subscription for the quantity specified, which leaves the subscription active for any remaining quantities

Note: Canceling a subscription through the Returns editor immediately deactivates any serial number associated with the subscription, and cancels all future billings and notifications. If you would prefer to allow the customer to access the subscription until the end of the current billing period, do not cancel the subscription through the Returns editor. Instead, you or the customer should cancel the subscription through eSellerate After-Purchase Services (http://store.esellerate.net/support), which allows the subscription to expire at the end of the current billing period.

Note: Customers can change the quantity of their subscriptions at renewal time, or at any time while the subscription is active (if you have "Allow Change of Quantity" turned on). As a result, when you return and cancel a subscription for the quantity specified (by using either Full Order Return or Partial Return/Refund), your changes will affect the total quantity that remains active for the subscription. For example, assume that an order included a subscription quantity of 5, and the customer later increased the quantity to 8, which resulted in a new order for the 3 additions. If you returned and canceled all quantities (5) for the first order, a quantity of 3 would remain active. Or you could return and cancel all quantities (3) for the second order, in which case a quantity of 5 would remain active.

Note: When you cancel a subscription through the Returns editor, eSellerate sends an e-mail notification to the customer. We do not send a notification to you (the publisher) in this instance because you processed the cancellation.

When a subscription is canceled through eSellerate After-Purchase Services, eSellerate sends an e-mail notification to the publisher and the customer. We include you (the publisher) in these notifications to keep you informed when your customers cancel their subscriptions themselves.

See Also

"Returning Orders" on page 114

Cancel Subscription API

The Cancel Subscription API allows canceling a subscription by passing query string parameters in a URL. It is functionally the same as canceling the subscription through After-Purchase Services. With the API, there is the choice of canceling immediately, or waiting until the next scheduled billing (to make full use of the time already purchased for the current subscription). When the cancellation occurs, e-mail notifications are sent to the publisher and the subscriber.

Prerequisites

This option requires that you use either the XML order notice (version 3) or the Order Lookup Web Service to obtain one of the required parameters (subscription order ID). These resources can also be helpful for locating other order-related items that you will need for the API.

Parameters

Note: Because each renewal and recurring billing creates a new order, there can be multiple orders associated with a subscription. In those instances, only the current (and still active) subscription can be canceled.

You can find values for the first three parameters by using the XML resources previously mentioned.

- **oid** – Original order ID for the subscription order (**Required**).
- **soid** – Subscription order ID (**Required**).
- **email** – Customer e-mail address for the subscription order (**Required**).
- **action** – Always pass "cancel" (**Required**).
- **nextbilling** – Should this cancellation occur at the next scheduled billing, or immediately? Pass "true" to have the cancellation occur at the next billing, or "false" to cancel the subscription immediately (**Optional—defaults to "true"**).

Example Usage

This API uses the http://store1.esellerate.net domain. An example call follows.

http://store1.esellerate.net/ws/Service/SubscriptionService.aspx?action=cancel&oid=
ST12345&email=someone@mindvision.com&soid=SO12345&nextbilling=false

Response

The response is either **YES** (if the API canceled the subscription), or **NO** (if it couldn't cancel).

See Also

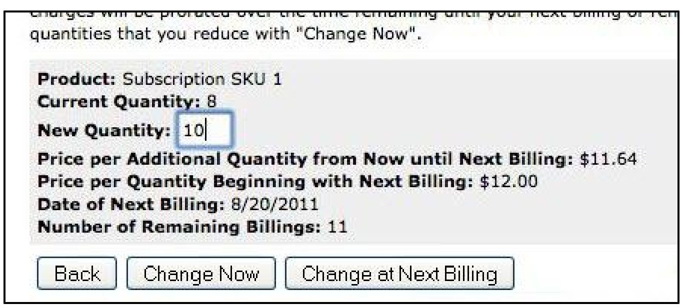
"Using the XML Order Notice" on page 151

Allowing Change of Quantity

There may be times when your customers will start a subscription, and then want to change the quantity that they originally purchased. This isn't possible with the default settings, but you can easily provide that capability so your customers don't have to resort to less convenient methods, such as canceling and repurchasing their subscriptions.

If you set up a subscription to allow changing the quantity, your customers will be able to increase or decrease the quantity at any time while the subscription is active, and eSellerate will adjust the charges accordingly (details follow).

Customers manage their subscriptions through eSellerate After-Purchase Services, where they can use the "change quantity" option to change the quantity of a subscription right away, or at the next scheduled billing (when applicable).



The differences between changing right away or at the next scheduled billing are as follows:

- **Change Now** – For an increase in quantity, a new order is created to charge the customer for the additional quantities. These charges are prorated over the time remaining until the next billing or renewal.

  Orders with prorated adjustments will also include charges (not prorated) for items such as shipping and eCD, when applicable.

  Like other changes in the life of the subscription, orders with prorated adjustments appear in the history of the original order. The subscription SKUs for these orders have "- Prorated Adjustment" at the end of their names to distinguish them from their full-priced counterparts.

  There are no automatic refunds for quantities that customers reduce with "Change Now". You can issue the refunds yourself if needed, by using the Returns editor to return just the desired quantities for the subscription orders.

After the "Change Now" quantity adjustment (and prorated adjustment, when applicable), the next scheduled billing will use the new quantity, and the total charges for that billing will change accordingly. At that point, everything is the same as if the customer had chosen to wait until the next billing for the change of quantity to take effect.

- **Change at Next Billing** – In contrast to "Change Now", this option simply sets the quantity to change later, and does not involve creating new orders for prorated adjustments. The next scheduled billing will use the new quantity, and the total charges for that billing will change accordingly.

Note: The "change quantity" option is not available for orders that use international wire or purchase order as the payment method.

Note: Shipping charges may vary when customers change the quantities of subscriptions that are set up for shipping.

To set up a subscription to allow changing the quantity:

1. You will need to start with a new subscription (which could be a duplicate of an active subscription), or a subscription that you have not yet activated. On the Details tab of the Subscription Detail page, select the **Allow Change of Quantity** check box.
2. When you're ready to save and activate the subscription, click **Activate**.
3. For each SKU that should use the new subscription, go to the Advanced tab, and then do the following:
   - In the **Subscription** list, select the new subscription.
   - Make sure that the **Allow multi-quantity sales** check box is selected. (This option is selected by default.)
   - Save your changes.
4. Assign the SKUs to your eSellers, if you haven't already done so.

More Options for Changing Quantity

Customers have the ability to change the quantity when renewing their subscriptions through After-Purchase Services. Changing quantity with renewals is allowed if the subscription SKU is set up for multi-quantity sales. The "Allow Change of Quantity" setting in the subscription method has no effect in this case.

Publishers can change (decrease) the quantity by using the Returns editor to return just the desired quantities for the subscription orders.

See Also

"Creating Shipping Tables" on page 130

"Subscriptions: Details" on page 208

"Setting the SKU's Advanced Properties (Optional)" on page 49

"Canceling and Returning Subscriptions" on page 215

Configuring eCD

eCD is a CD fulfillment service available to publishers using Web Store and Embedded Web Store eSellers. With eCD, you can offer backup CDs as add-ons when customers purchase software from your web store. Or you can sell CDs as items that are always included with certain SKUs.

Overview

To get started with eCD, you will need to click through the About eCD page, which will enable eCD for your publisher account. See "Getting Started: About eCD Page" below.

Next, review "Notes on eCD" below.

You can then configure eCD, which involves the following steps:

1. Organize the files that you want to provide on CD. See "Organizing Your Files for eCD" on page 222.
2. Upload your files and optionally designate them for eCD use only. See "Uploading eCD Files" on page 224.
3. Create custom images for various elements such as the CD face. See "eCD Images" on page 225.
4. Create eCD Layouts, which control attributes such as the images used in eCD and the inclusion of any trial files. See "eCD Layouts" on page 226.
5. Fill out the eCD Optional section of the eCD Configuration tab. This includes setting pricing and the layout for all SKUs that support eCD Optional. See "eCD Configuration" on page 229.
6. Assign an eCD file to each SKU that should support eCD Optional. See "Valid SKUs" on page 230.
7. Do the following for each SKU that should support eCD Included:
   - Add eCD into the SKU price. See "Pricing " on next page and "Creating the SKU and Setting Its Basic Properties" on page 43.
   - Set the following properties: Delivery Method, eCD File, eCD Layout and, when needed, eCD Delivery Frequency. See "Setting the SKU's Advanced Properties (Optional)" on page 49.
8. Set the file action for eCD files that are Zip archives. See "Valid eCD Files" on page 231.
9. Once you're finished with the preceding steps, we recommend ordering some test CDs to verify that everything is as you expected. Test CDs will be at your own expense.

Getting Started: About eCD Page

For information on the benefits of this service, go to the Advanced Sales Options section on the home page of the eSellerate Sales Manager and click **About eCD Fulfillment**. (This link will change after you click through the About eCD page.) When you finish reading the information, click **Continue**. You will then be able to use eCD in your publisher account.

Notes on eCD

When learning about eCD, it's important to start with the definitions below. We'll be referring to these two eCD types throughout the documentation.

Definitions

There are two main types of eCD:

- eCD Included – eCD is included with the SKU purchase when **Delivery Method** on the SKU Advanced tab is set to **Download and eCD** or **eCD Only**.

- eCD Optional – eCD is optional with the SKU purchase when **Delivery Method** on the SKU Advanced tab is set to **Download Only (eCD Optional)**.

Choosing an eCD Type

When choosing an eCD type, you should consider whether you want to include a CD with the SKU purchase (eCD Included), or offer a CD as an option that customers can purchase at an additional cost (eCD Optional).

Another consideration is your production costs, which may be higher with eCD Included because each SKU using this type requires its own CD. The costs can also be higher with eCD Included when you use certain subscription settings. (See "Production Costs" below.)

Finally, with eCD Included you can send CDs at various times during a subscription period (for recurring billings and renewals) in addition to sending them with the initial order. (See "Subscription Options" on the facing page.)

CD Contents

- eCD Included – The CD can contain content for one SKU (the one that included eCD), plus trial files when applicable.
- eCD Optional – The CD can contain content for all SKUs in the order that are set up for eCD Optional. It can also contain trial files when applicable.

For more information, see "Organizing Your Files for eCD" on page 222.

Production Costs

You pay a set fee per CD (the eSellerate eCD charge), plus your usual eSellerate service fee percentage of the total purchase price.

For details on your production costs, please see the eCD Configuration tab in your publisher account. That tab shows the eSellerate eCD charge, and explains how the charge is applied differently between the two eCD types.

Pricing

- eCD Included – Because eCD is included with the SKU, you will need to add eCD into the SKU price. Be sure to cover all your production costs, including any additional charges for DVD cases and certain subscription settings. (See "Production Costs" above.) You can also set your pricing to make a profit on eCD if desired.

  > **Note:** The two places where you can set SKU pricing are the SKU Basic tab and the SKU Pricing page.

- eCD Optional – At a minimum, the customer pays the eSellerate eCD charge. In order to cover all your production costs, including any additional charges for DVD cases (see "Production Costs" above), you can set a markup on the total purchase price. The markup can be higher than your production costs if you choose to make a profit on eCD. You set the markup under "eCD Optional" on the eCD Configuration tab.

  > **Note:** Instead of setting the eCD price for each SKU as with eCD Included, with eCD Optional you set the price in one central location.

Cart Behavior

- eCD Included – A SKU with eCD Included looks and behaves the same as any regular SKU in the shopping cart. There is no built-in indicator that eCD is included, so it is the publisher's responsibility to convey that fact with text and images as needed.
- eCD Optional – When the customer adds the first eCD-enabled SKU to the shopping cart, a hyper-linked "eCD available" graphic appears next to the SKU name, and eCD appears as a purchase option at the bottom of the page. The customer can click either the "eCD available" graphic or a "What is eCD" link to learn more about the option. (This is the default behavior for presenting eCD as a purchase option. For an alternative, see "eCD Configuration" on page 229.)

Subscription Options

- eCD Included – When you sell a SKU through a subscription model with eCD Included, you can determine the eCD delivery frequency. There will always be a CD delivered with the initial order (the basis for all the frequency options), but you can also choose to have it delivered at additional times in the subscription period, including renewals and recurring billings. You set eCD delivery frequency on the SKU Advanced tab.
- eCD Optional – When you sell a SKU through a subscription model with eCD Optional, the customer can purchase eCD in conjunction with the SKU purchase. In that case, there will be a CD delivered with the initial order only. In contrast to eCD Included, with eCD Optional there are no options for delivering CDs at additional times in the subscription period.

Reporting

- eCD Included – Because eCD is included with the SKU, it is not a separate line item for most reporting purposes. One exception to note: When eSellerate creates a payment voucher, there will be a negative adjustment line item for eCD Fulfillment Expense in the Transaction Ledger sales report and the Payments report.
- eCD Optional – The eSellerate eCD SKU is a separate line item for reporting purposes, and will appear in eSellerate reports when appropriate.

Miscellaneous

- The eSellerate eCD charge covers shipping to locations worldwide.
- In the case of returned orders, the eSellerate eCD charge is nonrefundable. (You can provide your customers with a full refund, but as the publisher you will have already incurred the cost of the eCD charge.) Therefore, we recommend adding language to your return policy such as: "The CD cost is nonrefundable. If you receive a CD that is damaged or defective, it will be replaced at no charge."
- In contrast to our other fulfillment options, with eCD there is no need for you to:
    - Set up shipping tables.
    - Set SKUs to require shipping.
    - Ship orders.
    - Mark orders as fulfilled.
- Customer support questions regarding the CD shipment will be directed to eCD@esellerate.net.
- There are a number of customization options available to you with eCD. For details, see "eCD Layouts" on page 226 and "eCD Images" on page 225.
- The CD can contain an autorun HTML menu of its contents (Windows only).

- eCD Optional only:
  - eSellerate creates one eSellerate eCD SKU per publisher. You cannot access or edit this SKU.
  - The eSellerate eCD SKU will appear in order receipts and order confirmation e-mail. The per-SKU message for this SKU will include shipping details, and state that the CD delivery will be separate from any other deliveries involved in the order.

Organizing Your Files for eCD

As part of eCD configuration, you will decide which of your SKUs should support eCD, and then assign a download—or eCD file—to each SKU. How you work through this process depends on the eCD type.

eCD Included

With this type, the CD can contain an eCD file for one SKU (the one that included eCD), plus trial files when applicable.

The content of the eCD file can be anything you choose. It can be a backup copy of the associated SKU, but that is not a requirement.

We recommend that you use either a disk image (.dmg or .iso) or an installer executable (.exe) for your eCD file. If you use one of the disk image formats, the image will be extracted to the root of the CD. If you use an installer executable, the file will be placed in its own subdirectory on the CD, and an autorun HTML menu of the CD contents will be automatically created. The user will be able to click an "Install" button in the menu to open the corresponding file.

When you have a disk image or installer ready for use with eCD, you can skip to "Uploading eCD Files" on page 224.

eCD Optional

With this type, the CD can contain eCD files for all SKUs in the order that are set up for eCD Optional. It can also contain trial files when applicable.

Each eCD file should provide a backup copy of its associated SKU. This follows the standard for how eCD Optional is presented to customers as a purchase option.

For simplicity's sake, your eCD file could contain trial versions of all your products (organized within a Zip archive or an installer, for instance), so that the same files would be included on every CD purchased. Or you could create multiple eCD files, which would enable multiple eCD files to be included on a single CD.

The number of eCD files on a CD and the formats of those files will affect the CD configuration. For example, if a CD contains both Windows and Macintosh eCD files (other than disk images), an autorun HTML menu will be automatically created in support of the Windows files. However, if a CD contains only Macintosh eCD files (other than Zip archives), no autorun will be created.

For information related to the file formats that you offer, use the appropriate links below:

- ISO disk image files (.iso) – See "ISO Disk Image" on the facing page.
- Windows Zip archives (.zip) – See "Windows Zip" on the facing page.
- Windows files such as executables (.exe) and PDF (.pdf) – See "Windows Not Zip" on the facing page.
- Mac OS 9 disk image files (.img), Mac OS X disk image files (.dmg) – See "Macintosh Disk Image" on the facing page.
- Macintosh Zip archives (.zip) – See "Macintosh Zip " on page 224.
- Macintosh StuffIt archives (.sit), BinHex encoded files (.hqx), MacBinary encoded files (.bin) – See "Macintosh Not Disk Image, Not Zip" on page 224.

- Combinations of the above file types – See "Combined File Types (eCD Optional Only)" on next page.

When you have your files ready for use with eCD, see "Uploading eCD Files" on next page.

ISO Disk Image

If you use an ISO disk image file (.iso) with eCD, the image will be extracted to the root of the CD.

Windows Zip

The following options are available when using Windows Zip archives with eCD:

- An autorun HTML menu of the CD contents can be automatically created. In this case, the user will be able to click an "Install" button in the menu, which will open the corresponding file.
- You can supply your own AUTORUN.INF file within the Zip archive to enable custom functionality. Your autorun will be used when this eCD file is the only one on the CD. If other eCD files are included on the CD (which is possible only with eCD Optional), your autorun will not be used, and instead an autorun HTML menu of the CD contents will be automatically created.

With either option, you will need to include a file named "readme.xml" in the Zip archive. This XML file is needed to specify which file within the Zip archive should be opened from the autorun HTML menu (when applicable). The required format is as follows:

<Product>
<InstallFileName>.exe autorun points to </InstallFileName>
</Product>

Also note that the name of the file to be opened from the autorun menu must follow these conventions:

- No spaces
- Standard alphanumeric characters only
- 8.3 format (up to eight characters for the file name, followed by a three-character extension)

Note: You can use the Valid eCD Files feature on the eCD Configuration tab to control whether Zip archives are extracted before they're placed on the CD. If you choose to not extract a Windows Zip archive, there is no need to include an XML file as described in the preceding information. In this case, clicking the appropriate button in the autorun HTML menu will open the unextracted Zip archive.

Windows Not Zip

Windows eCD files such as executables (.exe) and PDF (.pdf) files will each be placed in their own sub-directory on the CD, and an autorun HTML menu of the CD contents will be automatically created. The user will be able to click an "Install" button in the menu to open the corresponding file.

Macintosh Disk Image

Mac OS 9

If you use a Mac OS 9 disk image file (.img) with eCD, the image will be extracted to the root of the CD.

Caution: Before you upload a Mac OS 9 disk image file for use with eCD, you must save the file in one of the following formats: MacBinary (.bin), BinHex (.hqx) or StuffIt (.sit). Be sure to retain the ".img" file extension. For instance, a Mac OS 9 disk image file named "Diskimage1.img" becomes "Dis-kimage1.img.bin" when saved as MacBinary.

Mac OS X

If you use a Mac OS X disk image file (.dmg) with eCD, the image will be extracted to the root of the CD.

Note: There is no need to compress or use any special encoding with these disk images before you upload them for use with eCD.

Macintosh Zip

Macintosh Zip archives (.zip) will each be placed in their own subdirectory on the CD, and an autorun HTML menu of the CD contents will be automatically created. On Windows systems, the user will be able to click an "Install" button in the menu to open the corresponding file. The autorun functionality will only be available on Windows.

Note: You can use the Valid eCD Files feature on the eCD Configuration tab to control whether Zip archives are extracted before they're placed on the CD.

Macintosh Not Disk Image, Not Zip

Macintosh eCD files such as StuffIt archives (.sit), BinHex encoded files (.hqx) and MacBinary encoded files (.bin) will each be placed in their own subdirectory (unextracted) on the CD. No autorun HTML menu is created, unless the eCD order combines these files and Windows files.

Note: When the CD is viewed on Mac OS 9, long file names will be truncated to the short 8.3 format.

Combined File Types (eCD Optional Only)

When eCD orders combine Macintosh and Windows eCD files, each file will each be placed in its own subdirectory on the CD, and an autorun HTML menu of the CD contents will be automatically created. On Windows systems, the user will be able to click an "Install" button in the menu to open the corresponding file. The autorun functionality will only be available on Windows.

Note: When eCD files are disk images, they will never be combined with other files on a CD as described here. This is because each disk image file requires its own CD.

Note: When the CD is viewed on Mac OS 9, long file names will be truncated to the short 8.3 format.

Uploading eCD Files

When you have your files ready for use with eCD, you can upload them as described here.

To upload eCD files:

1. Click the **Downloads** tab. The Downloads page appears.
2. Click **New**. The Download Detail page appears.
3. Follow the instructions provided in the help for that page. You will have the option of designating the upload for eCD use only.

See Also

"Creating Downloads" on page 128

"Organizing Your Files for eCD" on page 222

eCD Images

Most of the customization options available to you with eCD involve images. For each image used in eCD, you have the option of choosing the default version (when one is available), or a custom image that you have provided. Information on how to manage your custom images follows.

The eCD Images Page

The eCD Images page allows searching for images by description, file name, or both. (These are "includes" searches.) To further narrow your results, you can select an image type. You can also create, edit and delete images there.

To create an eCD Image:

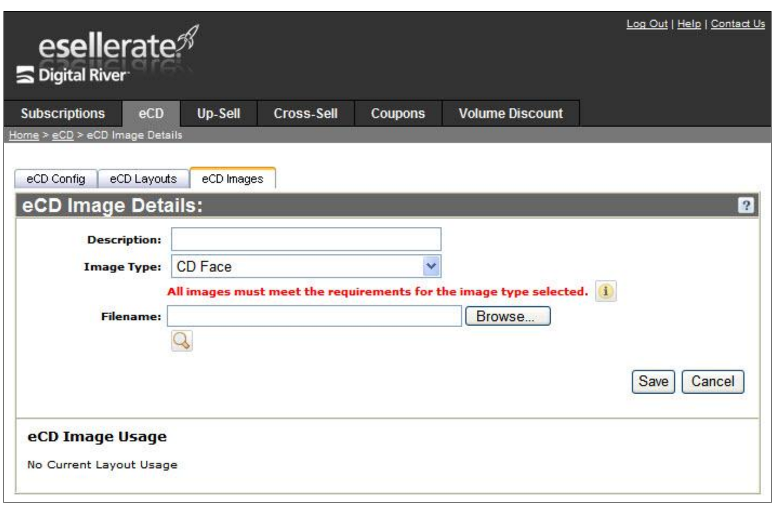
1. From the eCD Images page, click **New**. The eCD Layout Details page appears.
2. Complete the image setup as described at "eCD Images: Detail" below.
3. Click **Save**.

eCD Images: Detail

The following images used in eCD are customizable:

- CD Face
- DVD Case
- EU Mailer
- Install Menu Footer
- Install Menu Header
- US Mailer

Your custom images must meet the requirements listed at "eCD Image Requirements" on page 231.



To configure an eCD Image, you will need to fill out the eCD Image Detail page, as described here.

- **Description** – Enter a description for the image. The description is for internal identification only, and will not be visible to your customers.
- **Image Type** – What type of image are you adding here? Make your selection from the following choices:

  - CD Face
  - DVD Case
  - EU Mailer
  - Install Menu Footer
  - Install Menu Header
  - US Mailer
- **Filename** – This is where you add your custom image, which must meet the requirements for the image type. Click **Browse** (or **Choose File** if you're using Chrome or Safari), and then locate an image for uploading.

Saving eCD Images

When you're finished making changes to the image, click **Save**. Saving also will allow you to preview the image.

Previewing eCD Images

To preview an image after you have uploaded and saved it, click its **Preview** icon. Once the preview appears, you can see the image separately from its template by clicking **Hide Template**. To switch back to the template view, click **Show Template**.

Assigning eCD Images to Layouts

Once you have saved the image and verified that it looks correct in the preview, the next step is to assign it to your layouts. This involves making selections from the corresponding lists—such as **CD Face Image**—on the eCD Layout Detail page. See "eCD Layouts: Detail" on the facing page.

eCD Layouts

You can use eCD Layouts to control certain attributes of CDs that are delivered to your customers. Some examples are:

- Mailer Type (Standard Mailer, Custom Mailer or DVD Case)
- DVD Case Image
- CD Face Image
- Install Menu items (Header Image, Footer Image and Header Text)
- The inclusion of trial files when space allows

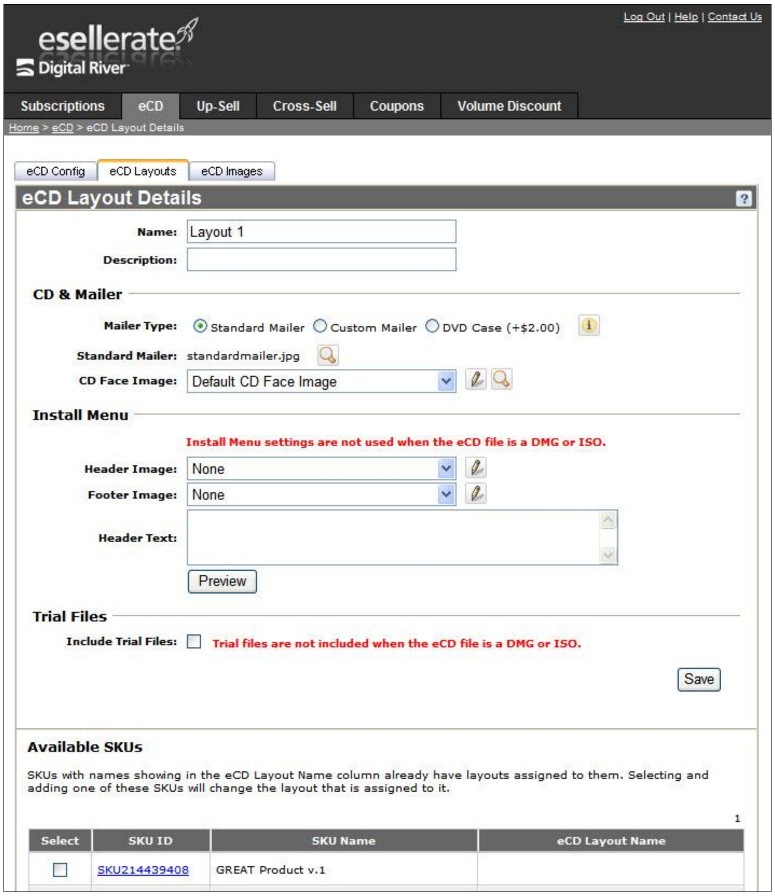
The eCD Layouts Page

The eCD Layouts page allows searching for layouts by name, description, or both. (These are "includes" searches.) You can also create, edit, duplicate and delete layouts there.

To create an eCD Layout:

1. From the eCD Layouts page, click **New**. The eCD Layout Details page appears.
2. Complete the layout setup as described at "eCD Layouts: Detail" on the facing page.
3. Click **Save**.

eCD Layouts: Detail



To configure a layout, you will need to fill out the upper portion of the eCD Layout Detail page, as described here.

- **Name** – Enter a name for the layout. The name is for internal identification only, and will not be visible to your customers.
- **Description** – Enter a description for the layout, if desired. The description is for internal identification only, and will not be visible to your customers.

CD & Mailer

- **Mailer Type** – Use this list to select the packaging for the CD. Your options are:
  - **Standard Mailer** – This is a cardboard mailer with a default image on the back. The mailer used will vary automatically depending on the destination of the order. The two possible versions are EU format (Europe and Japan) and US format (USA and the rest of the world).
  - **Custom Mailer** – This is a cardboard mailer with a default image or a custom image on the back (your choice). The mailer used will vary automatically depending on the destination of the order. The two possible versions are EU format (Europe and Japan) and US format (USA and the rest of the world).

    For help with setting up your custom images, see the Mailers section of "eCD Image Requirements" on page 231.

- **DVD Case (+$2.00)** – The DVD case allows you to customize nearly all of the available space with your own artwork. The case itself is mailed in a cardboard mailer that is not customizable.

  For help with setting up your custom images, see the DVD Covers section of "eCD Image Requirements" on page 231.

  > **Note:** When you choose **DVD Case (+$2.00)** instead of one of the other two **Mailer Type** options, you will be charged an additional $2.00 for each SKU quantity sold. For more information about eCD charges, see "eCD Included" and "eCD Optional" on the eCD Configuration tab.

- **US Mailer Image** – Applies only when **Mailer Type** is set to **Custom Mailer**. Use this list to select an image for the US version of the mailer. You can select the default image, or one that you uploaded. If you need to edit or upload a US Mailer Image before you make your selection, click **Save**, and then click the **Edit eCD Images** icon.
- **EU Mailer Image** – Applies only when **Mailer Type** is set to **Custom Mailer**. Use this list to select an image for the EU version of the mailer. You can select the default image, or one that you uploaded. If you need to edit or upload an EU Mailer Image before you make your selection, click **Save**, and then click the **Edit eCD Images** icon.
- **DVD Case Image** – Applies only when **Mailer Type** is set to **DVD Case (+$2.00)**. Use this list to select an image for the case. You can select the default image, or one that you uploaded. If you need to edit or upload a DVD Case Image before you make your selection, click **Save**, and then click the **Edit eCD Images** icon.
- **CD Face Image** – Use this list to select an image for the CD face. You can select the default image, or one that you uploaded. If you need to edit or upload a CD Face Image before you make your selection, click **Save**, and then click the **Edit eCD Images** icon.

  For help with setting up your custom images, see the Disk Faces section of "eCD Image Requirements" on page 231.

Install Menu

> **Note:** Install Menu settings are not used when the eCD file is a DMG or ISO.

- **Header Image** – Use this list to select an image for the header. You can select **None** so that no Header Image appears, or you can select an image that you uploaded. If you need to edit or upload a Header Image before you make your selection, click **Save**, and then click the **Edit eCD Images** icon.
- **Footer Image** – Use this list to select an image for the footer. You can select **None** so that no Footer Image appears, or you can select an image that you uploaded. If you need to edit or upload a Footer Image before you make your selection, click **Save**, and then click the **Edit eCD Images** icon.
- **Header Text** – Text that you enter here (as plain text, up to 1,000 characters) will appear directly below the Header Image in the Install Menu. If you leave this text field blank, no Header Text will appear.

For help with setting up your custom images, see the Install Menus section of "eCD Image Requirements" on page 231.

Trial Files

> **Note:** Disk images (DMG and ISO) do not work with the trial files option because each image would take up a complete CD on its own. There are two things to note about this limitation:
>
> • Trial files are not included when the eCD file is a DMG or ISO.
> • DMG and ISO files are not available for selection as trial files.

- **Include Trial Files** – Here you can specify up to five trial files to be included on the CD when space allows. To use this option, select the **Include Trial Files** check box. Then use the available lists (**Trial 1**, **Trial 2** and so on) to select trial files.

Previewing Current Settings

In the CD & Mailer section, you can preview the current settings for a specific image by clicking its **Preview** icon. Once the preview appears, you can see the image separately from its template by clicking **Hide Template**. To switch back to the template view, click **Show Template**.

In the Install Menu section, you can preview the current settings by clicking the **Preview Menu** button. (If there are unsaved changes in that section, you will need to save them first.)

Saving eCD Layouts

When you're finished making changes to the eCD Layout, click **Save**.

Assigning eCD Layouts to SKUs

You can assign eCD Layouts to SKUs at the SKU level (on the Advanced tab), or within the layout itself, as explained here.

In the lower portion of the eCD Layout Detail page, you can assign the current layout to one or more SKUs at a time.

- To sort through your available SKUs, you can use the provided paging or search options, or click **Show All <x> SKUs**.
- To select a SKU, check the appropriate box. When you're finished selecting SKUs, click **Add**.

> **Note**: To assign eCD Layouts to SKUs for eCD Optional, use the **eCD Layouts** list under "eCD Optional" on the eCD Configuration tab.

eCD Configuration

eCD Overview

When you have finished creating eCD Images and eCD Layouts, you can set up the eCD Configuration tab.

From the eSellerate Sales Manager home page, click **eCD Fulfillment**. The eCD Configuration tab appears (if you have already signed up for the service).

eCD Optional Section

The eCD Optional section applies to SKUs that have **Delivery Method** set to **Download Only (eCD Optional)**, and **eCD File** set to something other than **None**.

To set up the eCD Optional section:

1. For each order that includes eCD Optional, your customer will pay the amount indicated under "eSellerate eCD Charge," plus any publisher markup that you enter in the **Publisher Markup** field. The markup should be high enough so that the total purchase price at least covers your production costs for eCD. (See also "Pricing " on page 220.) If you choose to not charge a markup, this field can be left at $0.

   > **Note:** The **Total Purchase Price** field dynamically indicates the total of the eSellerate eCD charge and any publisher markup that you set. You cannot edit this field.

2. If you select the **Allow multi-quantity CD sales** check box, customers will be able to purchase multiple quantities of your CD, at the per-unit price indicated under "Total Purchase Price."
3. If you select the **Automatically add eCD SKU to cart with first eligible SKU** check box, when the customer adds the first eCD-enabled SKU to the shopping cart, a hyperlinked "eCD available" graphic will display next to the SKU name, and eCD will be automatically added to the cart. The customer can click the "eCD available" graphic to learn more about the option. If the customer removes eCD from the cart, eCD will appear as a purchase option at the bottom of the page.
4. You can use eCD Layouts to control certain attributes of CDs that are delivered to your customers. Some examples are the Mailer Type (Standard Mailer, Custom Mailer or DVD Case) and the CD Face Image.

   To select a layout, use the **eCD Layout** list. You can select the default layout, or one that you uploaded. If you need to edit or create a layout before you make your selection, click **Save**, and then click the **Edit eCD Layouts** icon.

   Note: The default layout includes a Standard Mailer, a default image for the CD face, a basic Install Menu, and no trial files.
5. Use the Valid eSellers feature to specify which of your eSellers should support eCD Optional. See "Valid eSellers" below.
6. When you're finished with these settings, click **Save**.

All Delivery Methods Section

To set up the All Delivery Methods section:

1. Use the Valid SKUs feature to assign eCD files to your SKUs. (This is the equivalent of assigning eCD files on each SKU's Advanced tab, so you can choose the method that works best for you.) See "Valid SKUs" below.
2. Use the Valid eCD Files feature to set the file action for eCD files that are Zip archives. See "Valid eCD Files" on the facing page.
3. When you're finished, click **Save**.

Valid eSellers

Here you can specify which of your eSellers should support eCD Optional.

Note: eCD is supported for Web Store and Embedded Web Store eSellers only.

To specify valid eCD eSellers:

1. From the eCD Configuration tab, click **Edit eSellers**. The eCD eSeller Configuration page displays all your Web Store eSellers.
2. To make an eSeller support eCD Optional in active mode, select its **Active** check box.
3. To make an eSeller support eCD Optional in preview mode, select its **Preview** check box.
4. When you're finished, click **Save**.

Note: When testing your eSellers in preview mode, eCD purchases do not result in actual shipments, just as the simulated payment processing does not result in actual charges.

Valid SKUs

The eCD SKU Configuration tab allows you to eCD-enable any of your SKUs by assigning them an eCD file. The eCD file that you select for a specific SKU determines the content that is written to CD to represent the

SKU when customers purchase eCD.

To assign eCD files:

1. From the eCD Configuration tab, click **Edit SKUs**. The eCD SKU Configuration page displays all your SKUs.
2. Do one of the following:
    - Click the list under "eCD File" to make individual selections.
        - If the SKU is a bundle, the "Specified in Each Child SKU" option will be available. Select this option if you want to provide a separate eCD file for each child SKU that uses one of the eCD types.
    - Click the provided button to set the eCD file for all SKUs to the default SKU download.
3. When you're finished, click **Save**.

Valid eCD Files

The sole purpose of this feature is to set the file action for eCD files that are Zip archives. For all other eCD file types, there is no action required on your part.

To change the eCD file action:

1. From the eCD Configuration tab, click **Edit Files**. The eCD File Configuration page displays all your eCD files.
2. For all eCD files that are Zip archives, click the list under "eCD File Action" and make a selection. Your options are as follows:
    - **Do Not Extract - Create Autorun**: Select this option if the file should not be extracted before it's placed on the CD. (This is the default setting for Zip archives.) There is no need to include a custom autorun with the file when you use this option.
    - **Extract - Create Autorun**: Select this option if the file should be extracted before it's placed on the CD, and the file does not include a custom autorun.
    - **Extract - Autorun Included**: Select this option if the file should be extracted before it's placed on the CD, and the file includes a custom autorun.
3. When you're finished, click **Save**.

See Also

"Windows Zip" on page 223

eCD Image Requirements

The following resources are available to help you set up your eCD images.

Mailers

Mailer Guidelines:
http://help.esellerate.net/eSellerate/Content/Extras/Mailer_Guidelines.pdf

US Mailer Templates:

- PSD template (to edit .psd files please use Adobe Photoshop CS or higher):
  http://help.esellerate.net/eSellerate/Content/Extras/Mailer_DR_template_US_PSD.zip
- PNG template:
  http://help.esellerate.net/eSellerate/Content/Extras/Mailer_DR_template_US_PNG.zip

EURO Mailer Templates:

- PSD template (to edit .psd files please use Adobe Photoshop CS or higher): http://help.esellerate.net/eSellerate/Content/Extras/Mailer_DR_template_EURO_PSD.zip
- PNG template: http://help.esellerate.net/eSellerate/Content/Extras/Mailer_DR_template_EURO_PNG.zip

DVD Covers

DVD Cover Guidelines:
http://help.esellerate.net/eSellerate/Content/Extras/DVD_Cover_Guidelines.pdf

DVD Cover Templates:

- PSD template (to edit .psd files use Adobe Photoshop CS or higher): http://help.esellerate.net/eSellerate/Content/Extras/DVDCover_DR_template_PSD.zip
- PNG template: http://help.esellerate.net/eSellerate/Content/Extras/DVDCover_DR_template_PNG.zip

Disc Faces

Disc Face Guidelines:
http://help.esellerate.net/eSellerate/Content/Extras/Disc_Face_Guidelines.pdf

Disc Face Templates:

- PSD template (to edit .psd files please use Adobe Photoshop CS or higher): http://help.esellerate.net/eSellerate/Content/Extras/DiscFace_DR_template_PSD.zip
- PNG template: http://help.esellerate.net/eSellerate/Content/Extras/DiscFace_DR_template_PNG.zip

Install Menus

Install Menu Guidelines:
http://help.esellerate.net/eSellerate/Content/Extras/Install_Menu_Guidelines.pdf

Install Menus do not require templates. An Install Menu sample is available here:
http://help.esellerate.net/eSellerate/Content/Extras/Install_Menu.png

eCD Optional and Tax-Inclusive Pricing

When an eSeller uses tax-inclusive pricing, your net earnings for eCD Optional sales will be reduced unless you increase the eCD price to make up for the tax amounts. To make those adjustments, we recommend using Native Currency Pricing, which will allow you to set eCD pricing in your customers' preferred currencies. (The pricing that you set for eCD will apply to all your valid eCD eSellers, including those that do not use tax-inclusive pricing.)

With tax-inclusive pricing, the total tax cost for eCD is subtracted from the publisher markup amount (see the eCD Configuration tab for that amount). For example, assume that the eSellerate eCD charge is $5 and the publisher markup is $5, for a total purchase price of $10. With a 7 percent tax rate, the total tax cost on $10 is $0.66. The publisher net earnings for a tax-inclusive sale would then be (5 – 0.66) = $4.34.

See Also

"Tax-Inclusive Pricing" on page 374

"Setting Up Pricing" on page 67

"Setting Native Currency Pricing for eCD" on page 71

Creating Up-Sells

With this feature, you can promote higher priced alternatives to the SKUs that your customers select for their purchases.

Information on up-selling appears here as follows:

- "Overview of Up-Selling" below
- "Creating Up-Sell SKU Groups" on page 235
- "Up-Sell SKU Options" on page 236
- "Assigning Up-Sell SKU Groups to eSellers" on page 237

Overview of Up-Selling

- Up-selling is supported for Web Store eSellers (with Custom Layouts or Standard Layouts) and Embedded Web Store eSellers only.
- An up-sell SKU replaces the SKU that the customer had originally selected. For example, if the selection of SKU A prompts an up-sell offer for SKU B, the customer has the option to purchase SKU B instead of SKU A.
- You can offer up-sell SKUs at a discount, or at full price.
- Your customers can purchase multiple quantities of an up-sell SKU if you have set up the SKU that way at the SKU level.
- With the default Custom Layouts functionality, there are two primary ways to present up-sell offers:
    - On a separate Up-Sell Page, which allows offering a single SKU only
    - On the Cart Page, which allows offering multiple SKUs
- An up-sell SKU can present its own up-sell offers when the customer adds it to the cart.
- Up-sell SKUs will display with the image and Short Description designated for them on the Basic tab of the SKU Detail page, when applicable.
- Multiple up-sell SKU groups can display when appropriate.

Advanced behaviors

- Before adding an up-sell SKU to the shopping cart, the customer must agree to any associated terms of sale.
- Terms of sale behavior differs slightly depending on whether you present up-sell offers on the Up-Sell Page or the Cart Page. If you use the Up-Sell Page, terms of sale will display immediately after the customer says yes or no to the up-sell offer. Those terms can be for the up-sell SKU, or the SKU that the customer originally selected. If you use the Cart Page, terms of sale will display immediately after the customer clicks the Buy button.
- When both up-sell and volume discounts apply, eSellerate uses the discount that results in the lower price.
- An up-sell SKU will always be added to the cart with a quantity of 1, regardless of the quantity set for the SKU it is replacing. (The exception is if that SKU is already in the cart, in which case the quantity will increment by one if the SKU allows multi-quantity sales.) Once the SKU is in the cart, the customer can increase the quantity if the SKU allows it.
- When multi-quantity sales are allowed, the last SKU added to the cart determines the pricing. For example, assume that SKU B is available as a regular catalog item for $25, and as an up-sell from some other SKU for the discounted price of $20. If the customer first adds the regular catalog item to the shopping cart, and later adds the up-sell version, the unit price becomes $20, and the quantity increases to 2.
- You can present up-sell offers for SKUs that you prefill into the shopping cart. (See "Cautions" below for limitations of using prefill in conjunction with the Up-Sell Page.)

Cautions

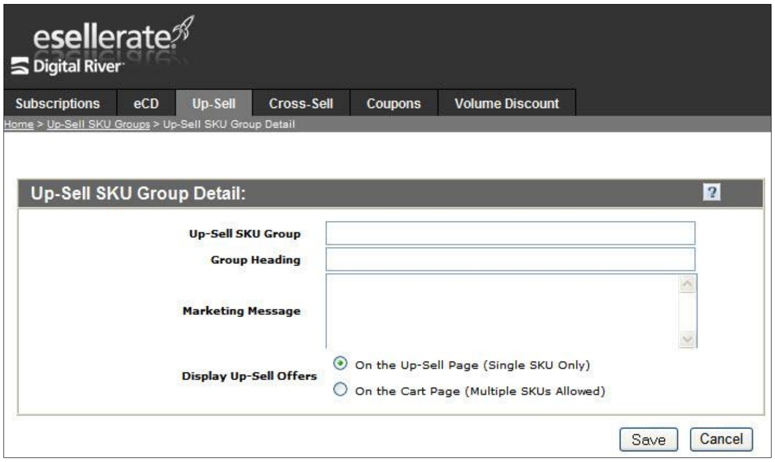
- eSellerate displays all up-sell offers that apply to the customer's purchase selections. To avoid issues such as showing two different discounts for the same up-sell SKU, you will need to pay close attention to your configurations.
- Setting up a SKU to not allow multi-quantity sales can prevent an up-sell from being added to the cart. For example, assume that SKU A is available as a regular catalog item, and as an up-sell from some other SKU. If the customer first adds the regular catalog item to the shopping cart, and later attempts to add the up-sell version, the cart contents do not change because the SKU in the cart already has a quantity of 1. In that same scenario, if the SKU allows multi-quantity sales, the quantity of the SKU in the cart increases by 1.
- Some limitations of displaying up-sell offers on a separate Up-Sell Page, as opposed to the Cart Page, are:
  - The Up-Sell Page can promote a single SKU only.
  - When the customer selects a SKU that has both up-sell and cross-sell SKU groups assigned to it, eSellerate presents the up-sell offer, and ignores the cross-sell assignment.
  - If you use the up-sell feature in conjunction with prefill, you should prefill no more than one SKU into the shopping cart at a time. In this scenario, the number of SKUs that you prefill will affect the store behavior as follows:
    - If you prefill one SKU, the Up-Sell Page will display first, followed by the terms of sale (when applicable), and then the page designated as First Page.
    - If you prefill multiple SKUs, eSellerate will add the SKUs to the cart without displaying the Up-Sell Page or any of the associated up-sell offers.

      See also "Prefilling Data" on page 288.
  - The customer has only one chance to take advantage of the up-sell offer presented on the Up-Sell Page. If the customer declines the offer, the up-sell SKU does not appear again.
- Affiliates receive sales credit only on SKUs that they have signed up to sell. Because up-sell SKUs replace the customer's original selection, a good way to ensure proper sales credit is for your affiliates to sign up to sell all your SKUs.
- eSellerate does not support presenting up-sell offers when the customer adds a cross-sell SKU to the cart.
- This note applies to Embedded Web Store eSellers only. If you use the up-sell feature in conjunction with eSellerate Product Activation, all SKUs that you offer in a given up-sell opportunity should use the same Product Activation Set ID. This is because the Product Activation Set ID that your eSeller passes for Purchase or CheckForUpdate API calls is the one eSellerate uses for activation, even if the customer ends up purchasing an up-sell SKU instead of the original selection. By coding related eSellers to pass the same Product Activation Set ID, you can avoid problems with validating activations after an up-sell purchase.

Creating Up-Sell SKU Groups

To create an up-sell SKU group:

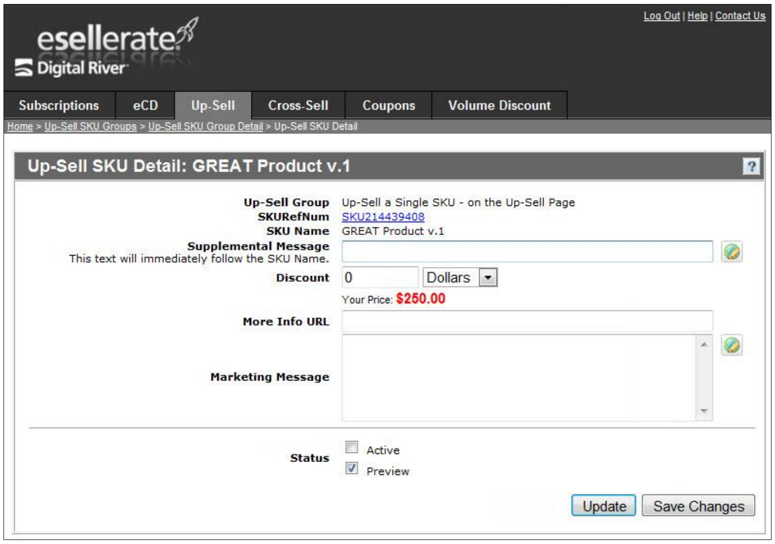
1. Click the **Up-Sell** tab. The Up-Sell SKU Group appears.
2. Click **New**. The Up-Sell SKU Group Detail page appears.



3. In the **Up-Sell SKU Group** field, enter a descriptive name for this group.
4. Any text that you enter in the **Group Heading** field will display in bold above this up-sell SKU group. If you leave this field blank, the default is the **Up-Sell SKU Group** text.
5. You can enter a marketing message of up to 1,000 characters in the field provided. If you leave this field blank, no text will display.
6. Select an option for displaying your up-sell offers. Your choices are as follows:
   - **On the Up-Sell Page (Single SKU Only)**– This option allows you to display your up-sell offer on a separate page that requires the customer to make a purchase decision before proceeding. An advantage of this option over the Cart Page is a more prominent up-sell presentation, which can include up to 4,000 characters of marketing text. Some limitations of this option are listed under "Overview of Up-Selling" on page 233.
   - **On the Cart Page (Multiple SKUs Allowed)**– This option allows you to display your up-sell offer(s) on the cart page, rather than a separate page. An advantage of this option over the Up-Sell Page is the ability to present multiple alternatives to the SKU that the customer selects.
7. Click **Save**. The Up-Sell SKUs dialog appears.
8. Click **Add SKU**. A new window appears.
9. Select a SKU to add to this group and click **Add Selected SKU**. The Up-Sell SKU Detail page appears.
10. Follow the instructions provided to add the SKU. (See "Up-Sell SKU Options" on next page.)
11. (If you chose the **Up-Sell Page** option for step 6, the up-sell SKU group is complete at this point, so you can skip steps 11-13.) When you're finished adding SKUs, click **Return to Up-Sell Group**.
12. By default, the up-sell SKUs will display in alphabetical order according to name. To change the ordering for a given up-sell SKU, enter a number (0-999) in its **Display Order** field and then click **Update Status**.
13. Click **Save Changes** to save this up-sell SKU group.

Up-Sell SKU Options

On the Up-Sell SKU Detail page, you can set the up-sell options for the selected SKU.



To set a SKU's up-sell options:

1. Text that you enter in the **Supplemental Message** field will immediately follow the SKU name (in up-sell offers appearing on the cart page only). For example, if you enter "(Price Reduced)" and your SKU name is "Great Product," the resulting display would appear as follows: **Great Product** (Price Reduced!)

   You can also leave this field blank so that no supplemental message appears.

2. The discount for this SKU can be a dollar amount or a percentage of the SKU price. In the **Discount** area, enter a discount amount and select either **Dollars** or **Percent**. To view a preview of how your discount information will display, click **Update**.
3. Up-sell SKUs have the option to display a More Info link, which will open a new page when clicked. This can be a text-based page or a web page. To enable the web page option, complete the **More Info URL** field. The field accepts up to 245 characters.

   > **Note:** URLs that you enter must use "http://" in the web address. For example, "http://www.-esellerate.net"

   If you leave this field blank, eSellerate will display this SKU's "More Info" Text as set on the Basic tab of the SKU Detail page. When no "More Info" Text exists, the More Info link will not display.

4. The **Marketing Message** field appears only if the current up-sell SKU group is set up to display up-sell offers on the Up-Sell Page. Text that you enter here will appear with this SKU on the Up-Sell Page.

   This field accepts up to 4,000 characters, which can include any of the valid HTML tags listed at http://www.webmonkey.com/2010/02/html_cheatsheet/.

   Also note that the HTML representations listed under "Name Code" and "Number Code" at http://www.webmonkey.com/2010/02/special_characters/ are valid anywhere the eSellerate system supports HTML.

   You should not enter eSellerate Custom Layout variables in the **Marketing Message** field.

5. An up-sell SKU with **Active** status will be available through your eSellers that are operating in active mode. Use **Preview** status to make the up-sell SKU available for testing eSellers in preview mode. Select the check boxes for the statuses that you want to use (either, neither or both). See "Notes on active and preview modes" below.
6. When you're finished setting up-sell options, click **Save Changes**.

Notes on active and preview modes

With Embedded Web Store eSellers, active/preview mode is controlled through the use of a preview certificate that's available at Home > eSeller Lists > Embedded Web Store eSeller Summary.

Links to your active and preview web stores are available at Home > eSeller Lists > Web Store eSeller Summary.

Assigning Up-Sell SKU Groups to eSellers

You will assign up-sell SKU groups at the eSeller level, so each SKU within the eSeller may present its own up-sell offers. See "Adding Embedded Web Store SKUs" on page 323 and "Adding Web Store SKUs" on page 364.

Creating Cross-Sells

With this feature, you can promote and cross-sell one or more additional SKUs to your customers when they make a purchase.

Information on cross-selling appears here as follows:

- "Notes on Cross-Selling" below
- "Creating Cross-Sell SKU Groups" below
- "Cross-Sell SKU Options" on page 240
- "About Active and Preview Modes" on page 241
- "Assigning Cross-Sell SKU Groups to eSellers" on page 241

Notes on Cross-Selling

Integrated eSellers

- The maximum quantity for cross-sell SKU purchases is one.
- Cross-sell SKUs will display with the image and Short Description designated for them on the Basic tab of the SKU Detail page, when applicable.
- Integrated eSellers can require the customer to agree to one set of terms during a purchase. Depending on your settings, these terms can be either of the following:
  - Any terms you choose to enter for the eSeller at the eSeller Summary level
  - Terms of sale for the primary SKU

Web Store and Embedded Web Store eSellers

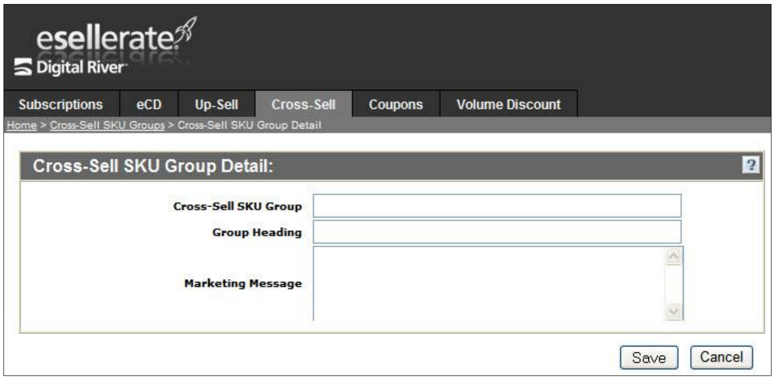
- Each cross-sell SKU has its own setting for controlling the quantities that customers can purchase. That setting is available at the Cross-Sell SKU Detail level.
- Cross-sell SKUs will display with the image and Short Description designated for them on the Basic tab of the SKU Detail page, when applicable.
- Before adding a SKU to the shopping cart, the customer must agree to any associated terms of sale.
- Multiple cross-sell SKU groups can display when appropriate.
- A cross-sell SKU can display in multiple SKU groups if it uses the same pricing in all instances. Otherwise, only the lowest price instance will display.
- Once a cross-sell SKU has been purchased at regular price, no discount price will display.
- A cross-sell SKU can offer its own cross-sell SKU group. If this cross-sell SKU is purchased at a discount, its cross-sell SKU group will not display.
- Removal of one SKU from the shopping cart can require the removal of other SKUs. A SKU that has no cross-sell relationship with the SKU being removed will remain in the cart. Otherwise, for the SKUs whose purchase was based on the SKU being removed, the following rules apply:
  - Remove discounted SKUs.
  - Remove SKUs if the primary SKU was hidden (shown only as a cross-sell item).

Creating Cross-Sell SKU Groups

To create a cross-sell SKU group:

Enter group name, heading and marketing message

1. Click the **Cross-Sell** tab. The Cross-Sell SKU Groups page appears.
2. Click **New**. The Cross-Sell SKU Group Detail page appears.



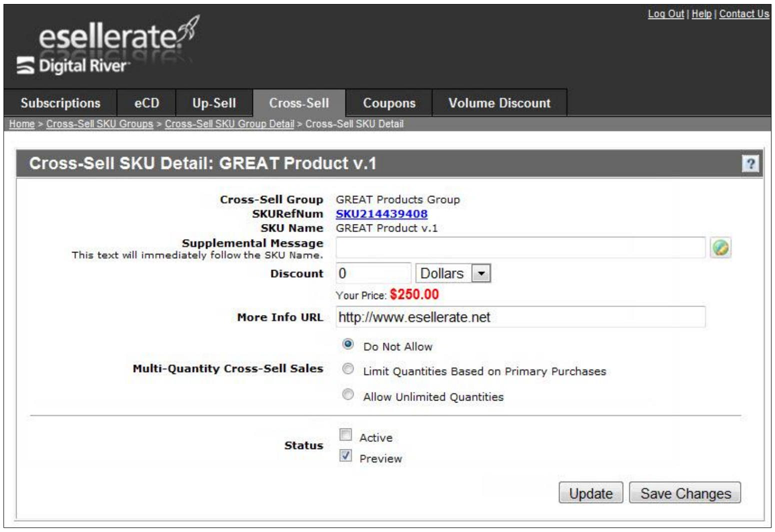
3. In the **Cross-Sell SKU Group** field, enter a descriptive name for this group.
4. Any text that you enter in the **Group Heading** field will display in bold above this cross-sell SKU group. If you leave this field blank, the default is the **Cross-Sell SKU Group** text.
5. You can enter a marketing message in the field provided. If you leave this field blank, no text will display.
6. Click **Save**. The Cross-Sell SKUs dialog appears.

Select SKUs for this group

1. Click **Add SKU**. A new window appears.
2. Select a SKU to add to this group and click **Add Selected SKU**. The Cross-Sell SKU Detail page appears.
3. Follow the instructions provided to add the SKU. (See "Cross-Sell SKU Options" on next page.)
4. When you're finished adding SKUs, click **Return to Cross-Sell Group**.
5. By default, the cross-sell SKUs will display in alphabetical order according to name. To change the ordering for a given cross-sell SKU, enter a number (0-999) in its **Display Order** field and then click **Update Status**.
6. Click **Save Changes** to save this cross-sell SKU group.

Cross-Sell SKU Options

On the Cross-Sell SKU Detail page, you can set the cross-sell options for the selected SKU.



To set a SKU's cross-sell options:

1. Text that you enter in the **Supplemental Message** field will immediately follow the SKU name. For example, if you enter "(Price Reduced)" and your SKU name is "Great Product," the resulting display would appear as follows: **Great Product** (Price Reduced!)

   You can also leave this field blank so that no supplemental message appears.

2. The discount for this SKU can be a dollar amount or a percentage of the SKU price. In the **Discount** area, enter a discount amount and select either **Dollars** or **Percent**. To view a preview of how your discount information will display, click **Update**.
3. Cross-sell SKUs have the option to display a More Info link, which will open a new page when clicked. This can be a text-based page (supported by all eSellers) or a web page (with some restrictions). To enable the web page option, complete the **More Info URL** field. The field accepts up to 245 characters.

   Note: URLs that you enter must use "http://" in the web address. For example, "http://www.esellerate.net"

   If you leave this field blank, eSellerate will display this SKU's "More Info" Text as set on the Basic tab of the SKU Detail page. When no "More Info" Text exists, the More Info link will not display.

   Restrictions for Integrated eSellers

   - The More Info URL option is not available for Integrated eSellers running on Macintosh systems. These eSellers will always behave as if you had left the More Info URL field blank (see above).
   - Integrated eSellers running on Windows systems require Internet Explorer 4.0 or later to use the More Info URL option. If this minimum requirement is not met, these eSellers will behave as if you had left the More Info URL field blank (see above).
   - Although Integrated eSellers can display basic web pages to showcase your products, they are not full-featured web browsers. You will need to carefully test any of these eSellers that use the More Info URL option, and adjust the referenced web pages as required.

4. The **Multi-Quantity Cross-Sell Sales** setting controls the quantities that customers can purchase for this cross-sell SKU. Your choices are as follows:
   - To prevent multi-quantity purchases of this SKU, you can accept the default setting, **Do Not Allow**.
   - To limit purchases of this SKU to the same quantity as the SKU(s) that prompted the cross-sell offer, select **Limit Quantities Based on Primary Purchases**. For example, assume that SKU A and SKU B offer this SKU through the same cross-sell SKU group. If the shopping cart contents include quantity 2 of SKU A and quantity 1 of SKU B, the customer can purchase up to quantity 3 of this SKU (as a cross-sell item).
   - To set no limits on this SKU's purchase quantities, select **Allow Unlimited Quantities**.

   Notes on this setting

     - If you set up a SKU to allow multi-quantity cross-sell sales (with limited or unlimited quantities), eSellerate will honor that setting even if you have set up the SKU at the SKU level to not allow multi-quantity sales. In instances when the SKU is not a cross-sell item, the SKU level setting still applies.
     - Integrated eSellers do not support multi-quantity cross-sell sales.
5. A cross-sell SKU with **Active** status will be available through your eSellers that are operating in active mode. Use **Preview** status to make the cross-sell SKU available for testing eSellers in preview mode. Select the check boxes for the statuses that you want to use (either, neither or both). See also "About Active and Preview Modes" below.
6. When you're finished setting cross-sell options, click **Save Changes**.

About Active and Preview Modes

With Integrated and Embedded Web Store eSellers, active/preview mode is controlled through the use of a preview certificate that's available at the following locations:

- Home > eSeller Lists > Integrated eSeller Summary
- Home > eSeller Lists > Embedded Web Store eSeller Summary

Links to your active and preview web stores are available at Home > eSeller Lists > Web Store eSeller Summary.

Assigning Cross-Sell SKU Groups to eSellers

Cross-selling is available for all eSellers.

Integrated eSellers

You can assign a cross-sell SKU group to the primary SKU. The eSeller will then display the respective cross-sell offers during every purchase.

Web Store and Embedded Web Store eSellers

You can assign a cross-sell SKU group to any of your SKUs. When a customer adds one of these SKUs to the shopping cart, your eSeller will display the respective cross-sell offers.

For information about assigning cross-sell SKU groups, see:

- Embedded – "Adding Embedded Web Store SKUs" on page 323
- Integrated – "Adding a Primary SKU to the eSeller" on page 342
- Web Store – "Adding Web Store SKUs" on page 364

Creating Coupons

This feature allows you to offer coupon discounts on products you sell through the eSellerate system.

Coupon information appears here as follows:

- "Notes on Coupons" below
- "Creating Coupon Discounts" on the facing page
- "Generating One-Time Use Coupons" on page 244
- "Extending the Coupon Expiration Date" on page 245
- "Editing Active Coupons" on page 245

Notes on Coupons

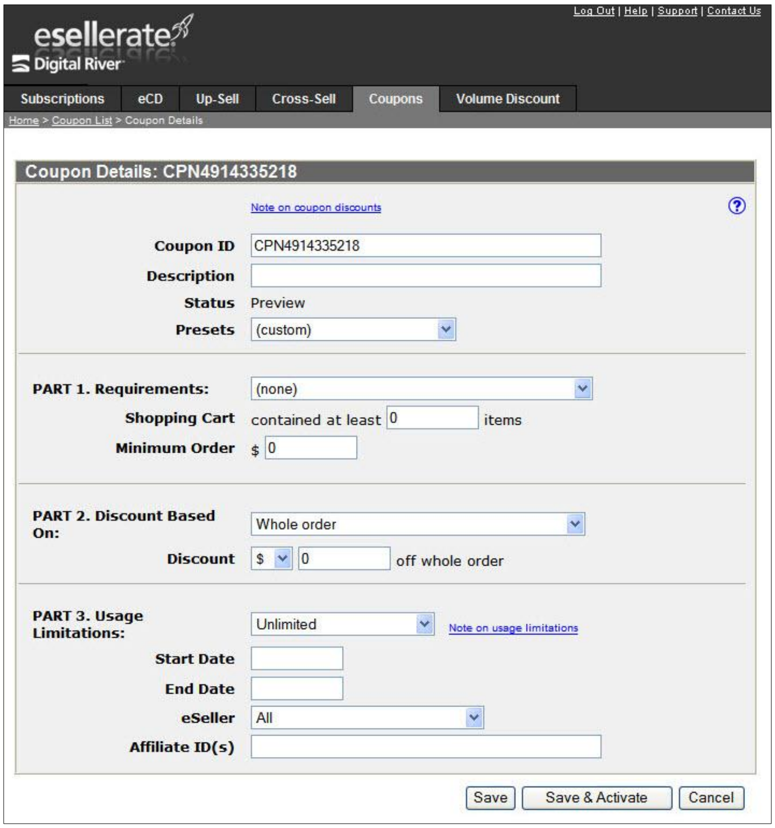
- In contrast to all other SKUs, coupon discounts do not apply to the eSellerate Download Protection (eDP) SKU amount.
- Coupon discounts always apply as a negative adjustment to the entire order amount (minus the eDP SKU amount when applicable), in the same way that shipping is a positive adjustment to the order.
- eSellerate will first apply any cross-sell, up-sell and volume discounts to individual order items, and then apply coupon discounts to the entire order amount (minus the eDP SKU amount when applicable).
- Sales tax is based on the subtotal after the coupon discount, not including shipping.
- eSellerate affiliate commissions and eSellerate fees are reduced proportionally (prorated) by the coupon discount amount.
- Only one coupon is allowed per order.
- A coupon with usage limitations is considered used even if the order is returned or voided.
- When processing order returns, you can return all or part of the coupon discount.
- Coupons can be generated for specific sales partners.
- A coupon can have one of three statuses:
    - Preview — set up but not activated for use
    - Active — set up and activated for use
    - Inactive — manually deactivated
- Coupons can be deactivated.
- Coupons with either Preview or Active status can be used in preview testing.
- Coupons are valid for private web stores.

Important: Make sure that your coupon discounts do not result in order totals that are greater than $0 and less than $1. Because payment processors cannot process transactions for amounts less than $1, a coupon discount that reduces the order total to less than $1 will force eSellerate to provide the product for free. Publishers accept complete responsibility for the setup and implementation of their coupons to prevent this occurrence.

Creating Coupon Discounts

To create a coupon:

From the Coupon List page, click **New**. The Coupon Details page appears.



Enter an ID

1. In the **Coupon ID** field, enter a descriptive coupon ID. This is the ID your customers will enter at purchase time.
2. In the **Description** field, enter a description if desired. Text that you enter here is for your reference only, and will not be visible to your customers.
3. You can use the **Presets** list to automatically set some basic coupon properties, such as 10 percent off an order.

Set coupon requirements (optional)

1. If you want this coupon to be valid only in conjunction with specific SKU purchases, make your selection from the list next to **PART 1. Requirements**. Then do the following:
   - Click **Pick SKUs** and make your selections. For some purchase requirements, you will also need to enter the number of days or a date.
   - To allow cross-sell discount purchases of your selected SKUs to count toward the coupon requirements, select the **Can be a Cross-Sell discounted SKU** check box. (This option is available for "current order" SKU purchases only.) If you do not enable this option, the selected SKUs must be purchased at regular price to count toward the coupon requirements.

2. Enter the minimum number of items the shopping cart must contain.
3. Enter the minimum dollar order amount. Taxes and shipping will not count toward this figure.

Base the discount on specific item prices

Coupon discounts can be based on the total price of all items in the order, or they can be based on more specific item prices. For example, you could set up a 5-percent discount that applies only to the purchase price of certain SKUs. Or you could exclude those same SKUs so that their purchase prices never affect the discount. You can also use this feature to easily set up a free shipping coupon.

1. Make your "based on" selection from the list next to **PART 2. Discount Based On**.
2. When applicable, click **Pick SKUs** and make your selections.
3. Specify the discount or the shipping method as required.

Important: As noted under "Notes on Coupons" on page 242, coupon discounts always apply as a negative adjustment to the entire order amount (minus the eSellerate Download Protection service (eDP) SKU amount when applicable). Consequently, though you can base your discount on the purchase price of certain SKUs and exclude the prices of others, you cannot prevent a SKU from receiving a portion of the discount. For example, assume that SKU 1, SKU 2 and SKU 3 cost $10 each, and you set up a coupon discount based on the purchase of SKU 1 and SKU 2, with 10 percent off each SKU. If a customer uses your coupon when purchasing all three SKUs, eSellerate applies the 10-percent discount off the prices of SKU 1 and SKU 2 to the entire order amount. The result is a $2 discount distributed between three $10 SKUs, which reduces the price of each SKU to $9.33. This behavior could be especially noteworthy if you used the eSellerate SplitPay program to pay your partners a portion of the sales proceeds from SKU 3, because those payments might be lower than expected.

Set usage limitations (optional)

1. You can limit coupon usage to one time only, one time only per e-mail or the first *n* customers. Make your selection from the list next to **PART 3. Usage Limitations**.
2. When applicable, enter the number of customers.
3. Enter the start date (mm/dd/yyyy), if desired. All dates are based on U.S. Central Standard Time (GMT-6/CST, Central United States).
4. Enter the end date (mm/dd/yyyy), if desired.
5. To limit coupon usage to a single eSeller, make a selection from the provided list. Otherwise, you can allow the coupon to be used with all your qualified eSellers.
6. To limit coupon usage to specific affiliates, enter the affiliate IDs. Be sure to enter the entire ID, including prefix ("AFF" for basic affiliates and "AFL" for eSellerate Affiliates). Separate multiple entries with commas.

   Note: When a customer uses one of your coupons, it takes at least 15 minutes for the information to reach all of eSellerate's redundant servers, or "stores." For that reason, any usage limitations that you set for a coupon—such as being valid for the first 50 customers—will be approximate rather than exact.

7. If you are ready to activate this coupon for use, click **Save & Activate**. Otherwise, click **Save**, which will allow you to activate the coupon later.

Generating One-Time Use Coupons

After you activate a one-time use coupon, its Coupon Details page will allow you to generate a text file containing coupon IDs.

Enter the number of coupons needed and click **Generate**. The resulting Save As dialog will display a default file name, which you can change if desired. You can also change the file extension to another text format (such as ".txt") before saving the file.

Extending the Coupon Expiration Date

After you activate a coupon that uses an expiration date, its Coupon Details page will allow you to extend the expiration (as long as the date has not yet passed).

Enter a date in the **New End Date** field and click **Extend Expiration Date**. You can extend the expiration date as many times as needed while the coupon is still valid.

Editing Active Coupons

After you activate a coupon, the only way to modify its settings is to change its status back to Preview. (The one exception to this rule is that an expiration date can be extended for an Active coupon that has not yet expired.) To edit an Active coupon, go to its Coupon Details page and click **Edit**. A window will display cautionary information (see below), and prompt you to confirm the action. If you're ready to proceed with the editing, click **OK**. Otherwise, click **Cancel**.

CAUTION:

- This action will set the coupon status to Preview, which will allow you to edit the coupon properties.
- Editing this coupon does not reset usage history.
- If you confirm this action, your customers will not be able to use the coupon until you activate it again.

Prefilling Coupon ID

You can prefill the coupon ID so that your customers will not need to enter it during the purchase process. How you prefill the ID depends on the eSeller.

- For Integrated and Embedded Web Store eSellers, pass the ID in the couponID parameter of the Purchase function call.
- For Web Store eSellers, add the coupon ID to the end of any "Buy" URLs used on your web site or distributed to your sales partners. The required format is "&coupon=" followed by coupon ID.

Creating Volume Discounts

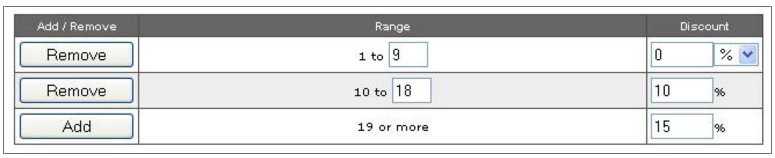
The eSellerate system enables you to offer volume discount pricing for any SKU you sell.

Information on volume discounts appears here as follows:

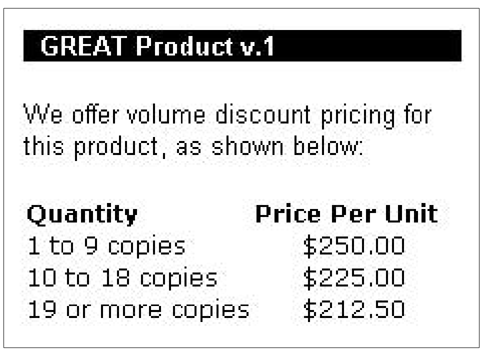
- "Volume Discount Example" below
- "Creating Volume Discount Sets" on the facing page
- "Assigning Volume Discounts to eSellers" on page 248

Volume Discount Example

You can use volume discounts to offer price breaks at one or more ranges. For example, if you wanted to offer no discount for 1 to 9 copies, a 10 percent discount for 10 to 18 copies, and a 15 percent discount for 19 or more copies, you would set up the ranges as follows:



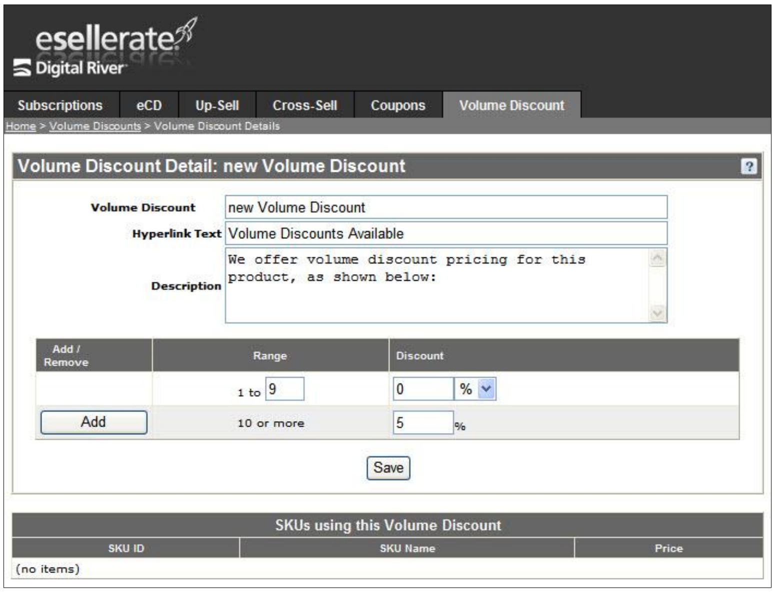
A product priced at $250.00 and using this volume discount would present the following offers:



Creating Volume Discount Sets

To create a volume discount set:

1. Click the **Volume Discount** tab. The Volume Discount page appears.
2. Click **New**. The Volume Discount Details page appears.



3. In the **Volume Discount** field, enter the name for this volume discount set. (There is a 50-character limit.) The name is for internal identification purposes only, and will not be visible to your customers.
4. SKUs that use this set will display a hyperlink that customers can click to view volume discount information. You can enter your own text in the **Hyperlink Text** field, or accept the default.
5. The **Description** field defines the text that will appear above the volume discount details. You can enter your own text here, or accept the default.
6. Discounts in this set can be based on either dollars or percentages. Make your selection from the **Discount** list.
7. The first row of the set defines the volume discount for the range of 1 to whatever quantity you specify. The discount for the 1 to <x> range is typically 0 (to provide incentive for higher-volume purchases), but you can use any amount that you want. Enter the ending value for this range in the **Range** field, and enter the discount in the **Discount** field.

   Note: As an example, if you wanted a quantity of 5 to be the first level that qualifies for a volume discount, you would set up the first row by entering 4 in the **Range** field, and 0 in the **Discount** field.

8. The ending row in a set always shows a range of <x> or more, with <x> being one more than the previous row's ending value. If no more rows are needed, you can fill out the ending row by entering a discount in the **Discount** field. Otherwise, if you need another row, you can create it by clicking the **Add** button. Repeat this process in successive rows to create as many rows as needed.
9. When you're finished editing this set, click **Save**.

Assigning Volume Discounts to eSellers

You will assign volume discounts at the eSeller level, so each SKU within the eSeller may use its own discount pricing. For information about assigning volume discounts, see:

- Embedded – "Adding Embedded Web Store SKUs" on page 323
- Integrated – "Adding a Primary SKU to the eSeller" on page 342
- Web Store – "Adding Web Store SKUs" on page 364

Chapter 9 - eSellerate Affiliates

The eSellerate Affiliates section of the eSellerate Sales Manager is for accomplishing the following tasks:

- "Joining eSellerate Affiliates" on next page
- "Entering Affiliate Contact Information" on page 251
- "Submitting SKUs" on page 252
- "Creating eST Downloads" on page 256
- "Testing eST Downloads" on page 261
- "Updating eST Downloads" on page 262
- "Customizing Online Stores for Select Affiliates" on page 263
- "Making Affiliate Level Changes" on page 264

Joining eSellerate Affiliates

To help you extend your sales opportunities into more channels, eSellerate supports affiliate sales. This support is available at two different levels to suit your individual needs:

- Basic Affiliates offers simple affiliate sales tracking. You take care of recruiting affiliates and paying them for their sales. See "Setting Up Basic Affiliates" on page 266.
- eSellerate Affiliates (see below) is a full-featured affiliates program. eSellerate markets your products to potential affiliates and handles all payments.

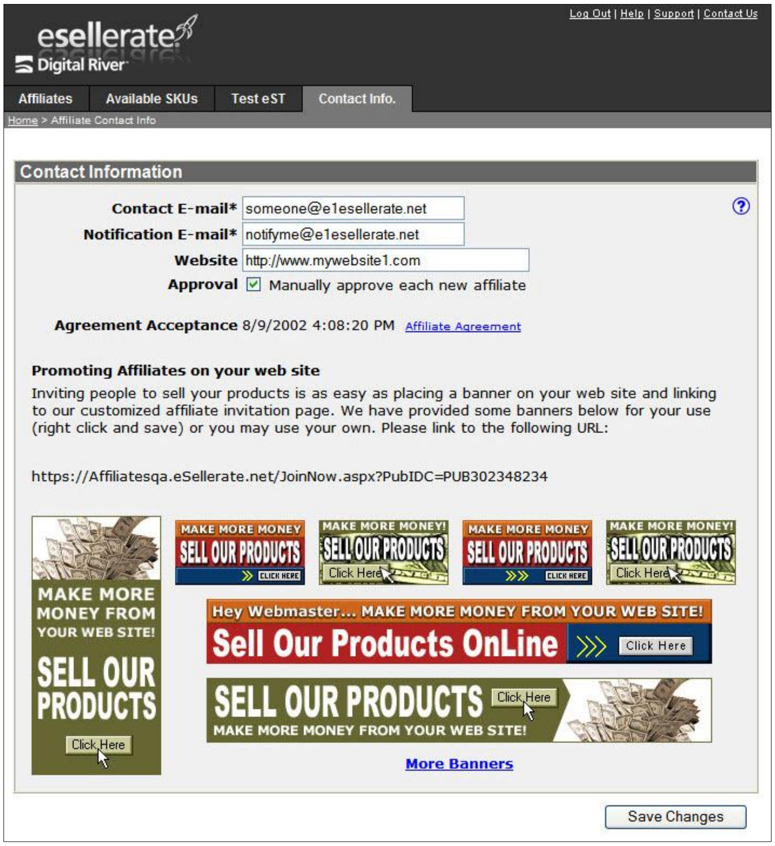
eSellerate Affiliates

For information on the benefits of this program, go to the eSellerate Affiliates section on the home page of the eSellerate Sales Manager and click **Learn More**. (This link will not display after you join the program.) The page that appears will outline the steps required to get started in this program, which include:

1. Accept our Affiliate Agreement.
2. Set up your contact information that will be available to all affiliates.
3. Submit your SKUs for posting in the Available Products section of the affiliate web site.

Entering Affiliate Contact Information

Use the Contact Information page to define your contact information that will be available to all affiliates.



To enter your affiliate contact information:

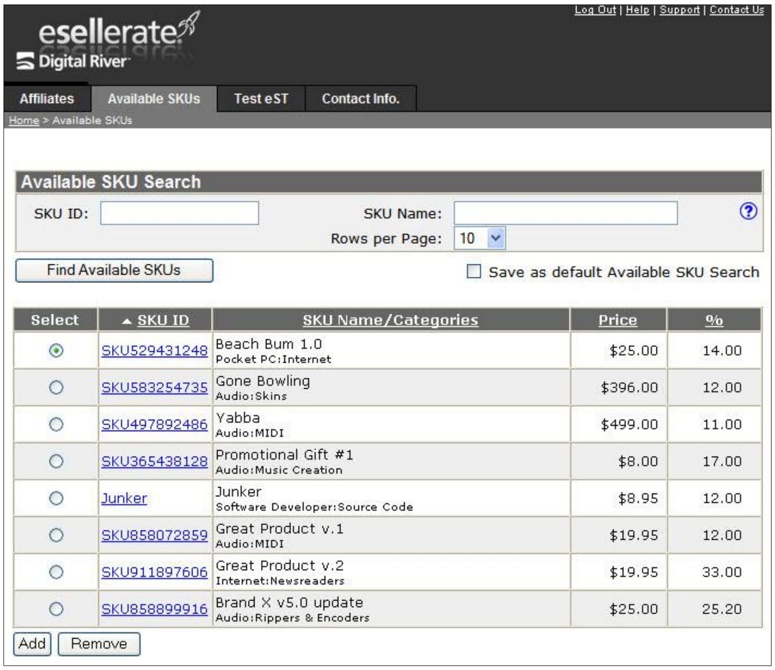
1. Complete the **Contact E-mail** field. This will be the "From" address for e-mails sent for event notifications, such as when you approve an affiliate's request to sell your products. This address can also be used by affiliates wanting more information about your available products.
2. Complete the **Notification E-mail** field. This will be the "To" address where you will receive e-mails sent for event notifications, such as when an affiliate signs up to sell one of your products.
3. If you complete the **Website** field (which is optional), the URL will be available to affiliates who view your available products.
4. If you would like to manually approve each new affiliate, select the **Approval** check box. With this option, once approved to sell your products, an affiliate can sell any product you make available.
5. The Contact Information page also offers an easy way to promote your products to potential affiliates. See the on-screen instructions for details.

   Tip: If you host the affiliate web site in frames within your own web site, you have the option to hide the affiliate banner. To do this, add "&showbanner=false" to the end of any URLs that you use to reference the affiliate site. For example, the following URL would open a customized affiliate invitation page and hide the banner for the duration of the session: http://Affiliates.eSellerate.net/JoinNow.aspx?PubIDC=PUB123456789&showbanner=false

6. Click **Save Changes**.

Submitting SKUs

Use the Available SKUs page to manage the SKUs you make available for affiliate sale. SKUs that you add through this page will be listed in the Available Products section of the eSellerate Affiliates web site. (For special circumstances, you can offer SKUs to affiliates without listing the SKUs on the affiliates web site.)



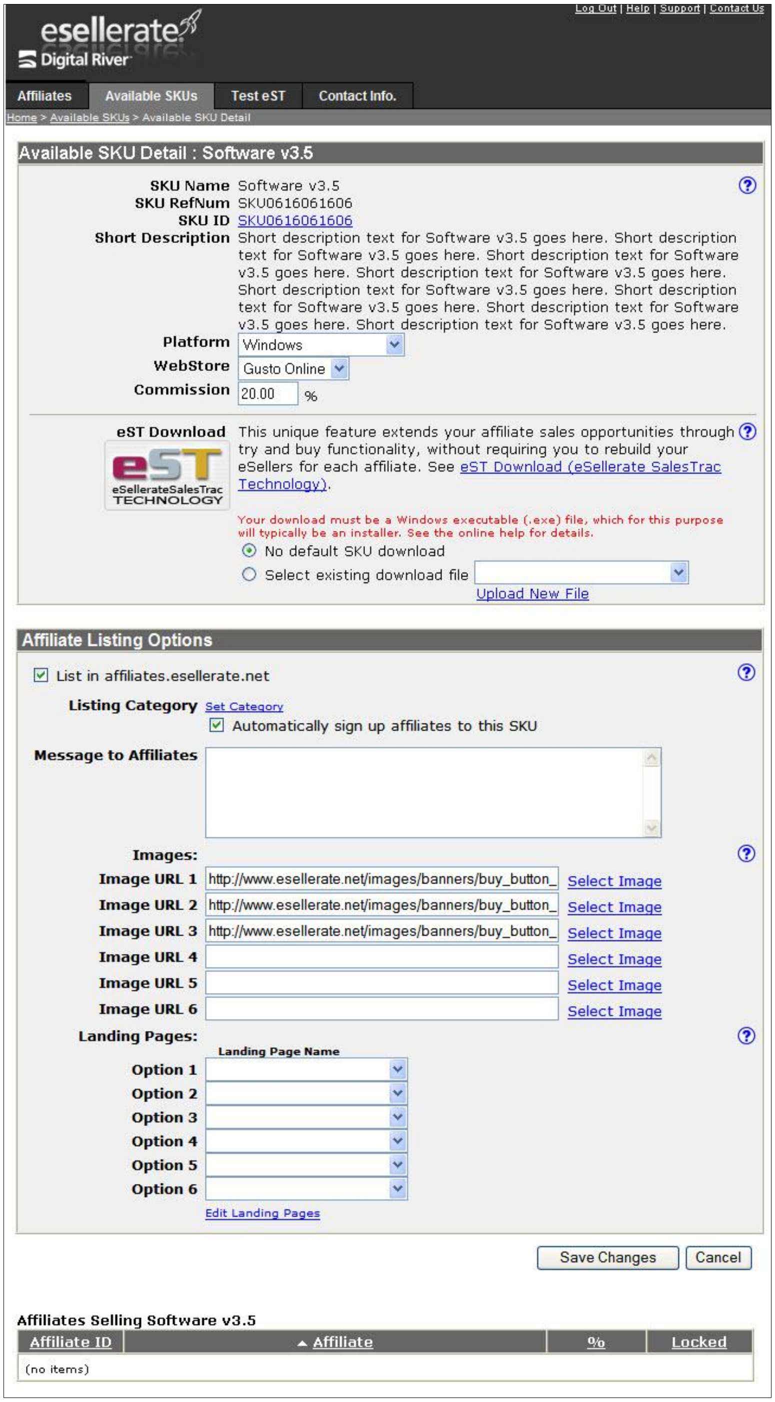
Submit SKUs

To submit SKUs for affiliates to sell, click **Add** and follow the instructions provided.

Note: When adding to your Available SKUs, you will only be able to select active SKUs that are assigned to Web Store eSellers and/or Embedded Web Store eSellers. Other eSeller options for the SKU will be available when you set up its Available SKU Detail page.

Once you have set up your Available SKUs and Affiliate Contact Information, you will receive e-mail notification each time an affiliate signs up to sell one of your SKUs. (If you have opted to manually approve each new affiliate, the first e-mail you receive from the affiliate will be the request to sell.)

Complete the Available SKU Detail page



The Available SKU Detail page gives you control over details such as:

- How the SKU is presented in the Available Products section of the eSellerate Affiliates web site
- Whether the SKU is included when affiliates sign up to sell all of your products
- The default commission rate offered to affiliates for selling the SKU
- The ability to extend your affiliate sales opportunities through try and buy functionality

To set up the Available SKU Detail page:

1. If desired, you can click the **SKU ID** field and make changes to the SKU's global settings. Be sure to note that any changes you make to these settings will affect the SKU in all associations.
2. In the **Platform** list, select a platform for the SKU.
3. In the **WebStore** list, select the eSellerate Web Store or Embedded Web Store that should process sales made through affiliate "Buy" links to the SKU. (Also see "Customizing Online Stores for Select Affiliates" on page 263.)
4. In the **Commission** field, enter the default commission rate. (After an approved affiliate signs up to sell the SKU, you can set the affiliate's individual commission rate from its Affiliate SKU Detail page.)
5. When applicable, use the eST Download feature to enable affiliates to display "Try" links to the SKU. See "Creating eST Downloads" on page 256.
6. To list the SKU in the Available Products section of the eSellerate Affiliates web site (affiliates.esellerate.net), select the **List in affiliates.esellerate.net** check box. (This option is selected by default.) If you choose to not list the SKU, clear the check box. A sign-up URL appears. You can provide this URL to affiliates that want to sign up to sell the individual SKU.
7. Click **Set Category** and set at least one category for displaying the SKU in the Available Products section. You can set up to four categories. Setting the category is required even if you did not enable the "List in affiliates.esellerate.net" option for step 6.
8. Affiliates can sign up to sell your individual products, or all of your products. To include the SKU in the automatic sign-up process when affiliates request to sell all of your products, select the **Automatically sign up affiliates to this SKU** check box. You must select this check box if you enabled the "List in affiliates.esellerate.net" option for step 6.
9. In the **Message to Affiliates** field, enter a message that will entice affiliates to sell the SKU.
10. Images that you specify in the **Image URL** fields will be available for affiliates to use for two purposes: displaying "Buy" links to the SKU, and displaying links to Landing Pages that feature the SKU, when applicable.

    eSellerate makes several different images available for you to use. To select one, click **Select Image**.

    You can also enter or paste in URLs for your own standard web images.

    Also note:

    - You can use the following example of standard image types and sizes as a guideline for your own images:
        - **Image URL 1:** Box shot (160 x 160 pixels)
        - **Image URL 2:** Screenshot 1 (600 x 400 pixels)
        - **Image URL 3:** Screenshot 2 (600 x 400 pixels)
        - **Image URL 4:** Product icon (32 x 32 pixels)
        - **Image URL 5:** "Headline" banner (468 x 60 pixels)
        - **Image URL 6:** "Skyscraper" banner (728 x 90 pixels)
11. (Steps 11-14 apply only if you use Landing Pages.) In the Affiliate Listing Options section under "Landing Pages," click one of the lists and select a Landing Page.
12. When a confirmation appears, click **OK**.
13. If you selected a customizable Landing Page (something other than the EZ Landing Page), the Query String Parameters field will display all external variables found in that page. Some of these variables will be prefilled with values. Enter a value for any variable that doesn't include one by default, with the exception of AffID and AT. You should leave the values for AffID and AT blank.

14. If you selected the EZ Landing Page, there is nothing that you are required to add to the Query String Parameters field. However, if you specify a tracking ID, eSellerate will record that ID along with other order details whenever the "Buy" or "Try" links in the Landing Page generate a sale. You can then use the SKU Sales by Date Range report to find sales that involved the tracking ID. If you would like to use the tracking ID option, enter an ID immediately after "&PT=" in the Query String Parameters field. The ID can be any alphanumeric name you choose, up to a 100-character limit. (Though you can enter a value for PT if desired, you should leave the values for AffID and AT blank.) Repeat steps 11-14 to assign as many Landing Pages as needed (up to a limit of six).
15. Click **Save Changes**.

Note: When checking out details about your SKU, affiliates will see the Short Description and "More Info" Text you specified for the SKU on the Basic tab of the SKU Detail page. If you use an image (IMG) HTML tag in those descriptions to point to an image on your unsecured (http://) web site, please note that affiliates will see the following message when viewing your SKU details: "Security Information: This page contains both secure and nonsecure items. Do you want to display the nonsecure items?" The reason for this message is that your SKU information is stored on a secure server as part of eSellerate security measures, while the referenced image is stored on a nonsecure server. Online help for affiliates.esellerate.net advises affiliates to click Yes and continue when the message appears.

Note: When an affiliate signs up to sell all of your products, all SKUs that support automatic sign-up will be added to the affiliate's account (with either active or pending status). The same rule applies for SKUs that you offer in the future. The affiliate will receive e-mail notification for each automatic sign-up that occurs.

Creating eST Downloads

Along with displaying "Buy" links for your product, your affiliates can also earn commission by providing a trial version that will enable users to later purchase the product (Windows systems only). Some benefits of this method are:

- Users who are undecided about a purchase can try before they buy.
- When users are ready to buy, integrated purchase features make it easy.
- The eSellerate SalesTrac Technology (eST) used to package the product ensures that your affiliate receives credit for the sale. This creates incentive for affiliates to offer "Try" links for your product, and thereby extend your sales opportunities.

About eST

The basics of this feature are as follows:

1. You create a single Windows executable file (typically an installer) that delivers an eSellerate-powered product with try and buy functionality.
2. You upload the file to the eSellerate servers.
3. When one of your affiliates elects to sell your product through the eST option, eSellerate dynamically customizes the file for use by that affiliate.
4. The affiliate downloads its customized file and hosts the file on its web site.
5. A user downloads the file through the affiliate site.
6. When launched, the file writes affiliate information to the Windows registry.
7. When the user later buys the product using its integrated purchase features, registry information is used to credit the affiliate for the sale.

Note: As a backup to the primary tracking method (writing affiliate information to the registry), eST files also write to a cookie when launched. When the user bypasses the product's integrated purchase features and instead buys the product through your eSellerate web store, cookie information (if present) is used to credit the affiliate for the sale. (The cookie tracking method applies only to web store purchases made with Internet Explorer.)

About Hosted eST

If you use Hosted eST and Landing Pages, the basics of eST include a few options in addition to those described at "About eST" above. The difference is that for steps 4 and 5, affiliates can make customized eST files available to users without having to host those files themselves.

When Hosted eST and Landing Pages are available, the basics of eST are as follows:

1. You create a single Windows executable file (typically an installer) that delivers an eSellerate-powered product with try and buy functionality.
2. You upload the file to the eSellerate servers.
3. When one of your affiliates elects to sell your product through the eST option, eSellerate dynamically customizes the file for use by that affiliate.
4. The affiliate provides a link on its web site that allows users to download the customized file from eSellerate's servers. This could be a direct link to the download, or a link to a Landing Page that allows users to download the file.
5. A user downloads the file through the link on the affiliate's site.
6. When launched, the file writes affiliate information to the Windows registry.

Note: As a backup to the primary tracking method (writing affiliate information to the registry), eST files also write to a cookie when launched. When the user bypasses the product's integrated purchase features and instead buys the product through your eSellerate web store, cookie information (if present) is used to credit the affiliate for the sale. (The cookie tracking method applies only to web store purchases made with Internet Explorer.)

Creating an eST Download

Before you begin, you should have already set up the preceding portions of the Available SKU Detail page. With that complete, the next step is to upload a file (or select an existing one) that meets the following criteria:

- The primary SKU offered must be the same one listed on the Available SKU Detail page.
- The file must be a single Windows executable (typically an installer) that delivers an eSellerate-powered product with try and buy functionality. This could be any of the following:
  - An installer executable containing an Integrated eSeller or an Embedded Web Store eSeller (see also "eST and Embedded Web Store eSellers" below)
  - An alternative option for publishers not selling their product through Integrated eSellers or Embedded Web Store eSellers (see "In-App Buy URL" below)

If you are ready to make your SKU available for affiliates to sell through "Buy" and "Try" links, click **Save Changes**. Otherwise, you can first test the eST download as described at "Testing eST Downloads" on page 261.

eST and Embedded Web Store eSellers

At present, the eSellerate SalesTrac Technology (eST) feature of eSellerate Affiliates associates one eST download with one SKU. (You set up these relationships on the Available SKU Detail page.) If you use Embedded Web Store eSellers in conjunction with eST, it's important to note that you could inadvertently bypass eST if you direct users to a catalog page, rather than adding the associated SKU to the shopping cart.

To allow eST to work as designed, you should set up your eST downloads as follows: When a customer initiates an integrated purchase, your application should call the Purchase function and include the SKURefNum of the SKU associated with the eST download. Provided that your Custom Layout uses the default settings, this approach will cause the Embedded Web Store to add the referenced SKU to the shopping cart and display the cart page. No other SKUs will be visible, unless the user removes the current SKU from the shopping cart.

If you need alternatives to the default eST behavior, a few possible workarounds are as follows:

- You can configure your application source code to locate the eST entry in the registry and duplicate it for the other SKUs, making the necessary SKURefNum changes in the key name and the URL value.
- Provided that "SKU A" uses the normal eST functionality, you can configure your application source code to use the WebStoreURL function call to retrieve the eST entry from the registry, and then parse the URL to extract the affiliateID for use in the Purchase parameters for "SKU B."

Note: The affiliate-specific URL is stored as the "URL" (string) value of the registry key "HKEY_CURRENT_USER\Software\eSellerate\Affiliates\PUB123456789\SKU123456789"

In-App Buy URL

This option does not apply if you sell your product through an Integrated or Embedded Web Store eSeller.

As an alternative to Integrated and Embedded Web Store eSellers, you can create an eSellerate SalesTrac Technology (eST) download with buy capabilities that rely on a Web Store eSeller. Because this option (In-

App Buy URL) requires you to design how your application will retrieve affiliate registry information and display the store pages, we recommend that you first consider using Integrated or Embedded Web Store eSellers, which handle these tasks seamlessly through use of the eSellerate Engine.

If you decide to use the In-App Buy URL option, you will need to design your application to do the following:

Provide a "Buy" option

To make it easy for users to purchase when they're ready, your application should prominently display a "Buy" option. You can implement this option through a menu command, a "Buy Now" button, a message that appears at startup, or any other way you choose.

Retrieve affiliate information from the registry

When an eST download is first launched, it writes an affiliate-specific URL to the registry. Your application will need to retrieve this URL when the user initiates a purchase. The affiliate that provided the eST download will then receive credit for the sale.

The affiliate-specific URL is stored as the "URL" (string) value of the registry key "HKEY_CURRENT_USER\Software\eSellerate\Affiliates\PUB123456789\SKU123456789"

This information can be retrieved through functions provided in the SDK, or through program code similar to that in the C Code and Visual Basic Code examples. See "Retrieving Affiliate Information: C Code Example" below and "Retrieving Affiliate Information: Visual Basic Code Example" on the facing page.

Display HTML for the web store

Your application will need to use the affiliate-specific URL to display HTML for the web store. For a clean, integrated look, we recommend displaying the store pages from within your application, rather than launching a separate browser.

Once you've set up your application to handle the preceding tasks, you will need to package it as a single Windows executable. (This executable will typically be an installer, created with your choice of installer builder.) Finally, you will need to upload the file and save it as an eST download through the Available SKU Detail page.

When one of your affiliates elects to sell your product through the eST option, eSellerate will dynamically customize the file for use by that affiliate.

Retrieving Affiliate Information: C Code Example

The following sample C code demonstrates how to retrieve the affiliate-specific URL placed in the Windows registry by an eST download. This manual approach to getting the URL is not required when using Integrated or Embedded Web Store eSellers. Please see "In-App Buy URL" on previous page for details.

```
#include <windows.h>
#include <stdio.h>

/******
char WEBSTORE[SIZE];
RESULT = GetWebStoreURL(PUBLISHER, SKU, WEBSTORE, SIZE);
*******
RESULT = 0 indicates that no URL was found for the given PUBLISHER and SKU.
RESULT > 0 indicates the length of the URL found.
The URL found is copied to the WEBSTORE buffer given, if its SIZE permits.
******/

long GetWebStoreURL
( char* publisherID,    // 0-terminated string (input)
```

```
  char* skuRefNum,      // 0-terminated string (input)
  char* urlBuffer,      // string buffer (output)
  long urlBufferSize ) // size of buffer (input)
{
  HKEY key;
  char value[256];
  long size = sizeof(value);
  long result;

  // Make the URL empty by default.
  if ( ! urlBuffer || urlBufferSize < 1 ) return 0;
  urlBuffer[0] = '\0';

  // Locate the pertinent key.
  sprintf(value, "Software\\eSellerate\\Affiliates\\%s\\%s", publisherID, skuRefNum);
  result = RegOpenKeyEx(HKEY_CURRENT_USER, value, 0, KEY_QUERY_VALUE, &key);
  if ( result != ERROR_SUCCESS ) return 0;

  // Retrieve the pertinent value.
  RegQueryValueEx(key, "URL", 0, 0, (BYTE*) value, (DWORD*) &size);

  // Return the value and its length.
  if ( size <= urlBufferSize ) strcpy(urlBuffer, value);
  RegCloseKey(key);
  return size;
}
```

Retrieving Affiliate Information: Visual Basic Code Example

The following sample Visual Basic code demonstrates how to retrieve the affiliate-specific URL placed in the Windows registry by an eST download. This manual approach to getting the URL is not required when using Integrated or Embedded Web Store eSellers. Please see "In-App Buy URL" on page 257 for details.

```
Const HKEY_CURRENT_USER = &H80000001
Const KEY_QUERY_VALUE = &H1
Const ERROR_NONE = 0

Private Declare Function RegOpenKeyEx _
   Lib "advapi32.dll" Alias "RegOpenKeyExA" _
   (ByVal hKey As Long, ByVal sSubKey As String, _
   ByVal lZero As Long, ByVal lAccess As Long, _
   lResult As Long) As Long

Private Declare Function RegQueryValueExString _
   Lib "advapi32.dll" Alias "RegQueryValueExA" _
   (ByVal hKey As Long, ByVal sName As String, _
   ByVal lZero As Long, lType As Long, _
   ByVal sValue As String, lSize As Long) As Long

Private Declare Function RegCloseKey _
   Lib "advapi32.dll" _
  (ByVal hKey As Long) As Long

Private Function GetWebStoreURL(publisherID As String, skuRefNum As String) As String
   Dim key As Long
   Dim size As Long
   Dim result As Long
```

```
  Dim value As String

  'Locate the pertinent key.
  value = "Software\eSellerate\Affiliates\" & publisherID & "\" & skuRefNum
  result = RegOpenKeyEx(HKEY_CURRENT_USER, value, 0, KEY_QUERY_VALUE, key)
  If result = ERROR_NONE Then
     size = 256
     value = String(size, 0)
     'Retrieve the pertinent value.
     result = RegQueryValueExString(key, "URL", 0, 0, value, size)
     If result = ERROR_NONE Then
       'Return the value.
       GetWebStoreURL = Left$(value, size - 1)
     Else
       GetWebStoreURL = ""
       End If
       RegCloseKey(key)
     Else
       GetWebStoreURL = ""
     End If

End Function
```

Testing eST Downloads

The eSellerate system provides two ways to test eST downloads:

- The Test eST Download function, which can be used prior to the release to affiliates.
- The Test eST Trial Version function, which is for use after the release to affiliates.

Note: A test eST download will be identical to the one used by affiliates, except it will use "AFLTESTOK" as the affiliate ID.

To test an eST download:

1. From the Test eST Download page, select the SKU to associate with this test. It must be the same SKU offered by the download you select in the next step.
2. Select the download file you wish to test.
3. Click **Test eST Download**.
4. Launch the downloaded file, which will write an affiliate-specific URL to the registry. This URL is stored as the "URL" (string) value of the registry key "HKEY_CURRENT_USER\Sof-tware\eSellerate\Affiliates\PUB123456789\SKU123456789"
5. Verify that your application is retrieving and making use of the correct affiliate information, which can be done in one of three ways:
   - To test an eST download that delivers an Integrated eSeller, launch the eSeller and initiate a purchase. When the Software Delivery Wizard appears, click **Start**. At any screen you choose, press **Control+Shift** and click on the "Powered by eSellerate" logo. The web store URL displayed should include the correct SKU RefNum and the "AFLTESTOK" affiliate ID.
   - To test an eST download that delivers an Embedded Web Store eSeller, launch the eSeller and initiate a purchase. At any screen you choose, press **Control+Shift** and click on the globe in the browser status bar. The web store URL displayed should include the correct SKU RefNum and the "AFLTESTOK" affiliate ID.
   - If your eST download uses an In-App Buy URL, you should initiate a purchase and verify that the URL includes the correct SKU RefNum and the "AFLTESTOK" affiliate ID.

To use Test eST Trial Version:

1. At the Available SKU Detail page, click Test eST Trial Version.
2. Launch the downloaded file, which will write an affiliate-specific URL to the registry. This URL is stored as the "URL" (string) value of the registry key "HKEY_CURRENT_USER\Sof-tware\eSellerate\Affiliates\PUB123456789\SKU123456789"
3. Verify that your application is retrieving and making use of the correct affiliate information, which can be done in one of three ways:
   - To test an eST download that delivers an Integrated eSeller, launch the eSeller and initiate a purchase. When the Software Delivery Wizard appears, click **Start**. At any screen you choose, press **Control+Shift** and click on the "Powered by eSellerate" logo. The web store URL displayed should include the correct SKU RefNum and the "AFLTESTOK" affiliate ID.
   - To test an eST download that delivers an Embedded Web Store eSeller, launch the eSeller and initiate a purchase. At any screen you choose, press **Control+Shift** and click on the globe in the browser status bar. The web store URL displayed should include the correct SKU RefNum and the "AFLTESTOK" affiliate ID.
   - If your eST download uses an In-App Buy URL, you should initiate a purchase and verify that the URL includes the correct SKU RefNum and the "AFLTESTOK" affiliate ID.

Updating eST Downloads

To update an eST download, you can do either of the following:

- From the Available SKU Detail page, select a different download file and then click **Save Changes**.
- From the Download Detail page, upload a new file to replace one that serves as an eST download.

When you update an eST download or assign one to an available SKU that previously didn't offer eST, eSellerate will display a page that gives you the option to notify all affiliates affected by the change. This notification will be an e-mail message sent to all active affiliates that sell the SKU(s) associated with the eST download. The e-mail will list the updated eST download and the associated SKU(s), and provide a link that the affiliate can use to directly log in to the affiliate management system and obtain the new download. You can add an additional message to end of the e-mail if desired. If the changes you made would not require affiliates to replace existing versions of the eST download, you can skip sending the e-mail by clicking **Do Not Notify Affiliates**.

Customizing Online Stores for Select Affiliates

By default, all affiliate sales for a given SKU are directed through the eSellerate Web Store or Embedded Web Store assigned to the SKU at the Available SKU Detail page. If you'd like to vary this default behavior for select affiliates, you have two options:

- You can use a different Custom Layout for the default online store, when applicable.
- You can use a different online store than the default store.

To use a different Custom Layout for the default online store:

1. Go to the Custom Layout Detail page of the layout that you want to use.
2. Click **Settings**. The Settings tab appears.
3. Copy the Layout ID that is displayed at the top of the page.
4. Instruct your affiliates to append "&L=LayoutID" to URLs that they use for listing the SKU on their affiliate web sites. For example:
    - Layout ID: 068131648
    - Default URL: http://store.eSellerate.net/a.asp?c=0_SKU123456789_AFL123456789
    - Custom URL: http://store.eSellerate.net/a.asp?c=0_SKU123456789_AFL123456789&L=068131648

To use a different online store than the default store:

1. Go to the eSeller List page and locate the Embedded Web Store eSeller or Web Store eSeller that you want to use.
2. Copy the eSeller ID.
3. Instruct your affiliates to append "&S=eSellerID" to URLs that they use for listing the SKU on their affiliate web sites. For example:
    - eSeller ID: STR415756918
    - Default URL: http://store.eSellerate.net/a.asp?c=0_SKU123456789_AFL123456789
    - Custom URL: http://store.eSellerate.net/a.asp?c=0_SKU123456789_AFL123456789&S=STR415756918

Making Affiliate Level Changes

After an approved affiliate signs up to sell one of your SKUs, you can make changes that affect that affiliate only. For example, when you submit a SKU for listing in the affiliate system, you enter a default commission rate. All of your publishers will earn the default commission rate for selling that SKU, unless you change the rate for an individual affiliate.

In addition to setting an affiliate's commission rate, other changes that you can make at the affiliate level include:

- Locking the affiliate's commission rate so that so that changes made at the Available SKU Detail page will not affect it
- Deleting one of your SKUs so that the affiliate is no longer authorized to sell it
- Terminating your relationship with the affiliate

To make affiliate level changes:

1. Go to the Affiliates page and do a search for the desired affiliate, if it's not already showing.
2. Click the **Affiliate ID** field for the affiliate that requires changes. The Affiliate Detail page appears.
3. If for some reason you choose to terminate your relationship with the affiliate, click **Terminate** and follow the instructions provided.
4. To delete one of your SKUs so that the affiliate is no longer authorized to sell it, click the appropriate **Delete** button and follow the instructions provided.

   > **Note:** Even after you have deleted a SKU, the affiliate will be able to sign up for it again if you continue to list the SKU in affiliates.esellerate.net. To be able to control which affiliates can sign up for a SKU, go to its Available SKU Detail page and clear the **List in affiliates.esellerate.net** check box. A sign-up URL will appear. You can provide that URL to affiliates that you want to have sign up for the SKU.

5. To change or lock/unlock a commission rate that the affiliate earns for selling one of your SKUs, click the appropriate **SKU ID** field. The SKU Detail page appears. (This page provides SKU information that is specific to the individual affiliate.) You then have the following options:
   - To access the SKU's global settings, click the **SKU ID** field. Be sure to note that any changes you make to these settings will affect the SKU in all associations.
   - To set the commission rate that the individual affiliate earns for selling the SKU, click **Set Commission** and follow the instructions provided.
   - If you would like to lock the affiliate's commission rate so that changes made at the Available SKU Detail page will not affect it, click **Lock**. This will protect the rate from unintended changes while still allowing you to change the rate on an individual basis. (You can unlock the rate at any time by clicking **Unlock**.)

   When you're finished making changes, click **Return to Affiliate Details**.

Chapter 10 - Other Sales Partnerships

The Other Sales Partnerships section of the eSellerate Sales Manager is for completing the following tasks:

- "Setting Up Basic Affiliates" on next page
- "Joining eSellerate SplitPay" on page 268

Setting Up Basic Affiliates

To help you extend your sales opportunities into more channels, eSellerate supports affiliate sales. This support is available at two different levels to suit your individual needs:.

- Basic Affiliates (see below) offers simple affiliate sales tracking. You take care of recruiting affiliates and paying them for their sales.
- eSellerate Affiliates is a full-featured affiliates program. eSellerate markets your products to potential affiliates and handles all payments. See "Joining eSellerate Affiliates" on page 250.

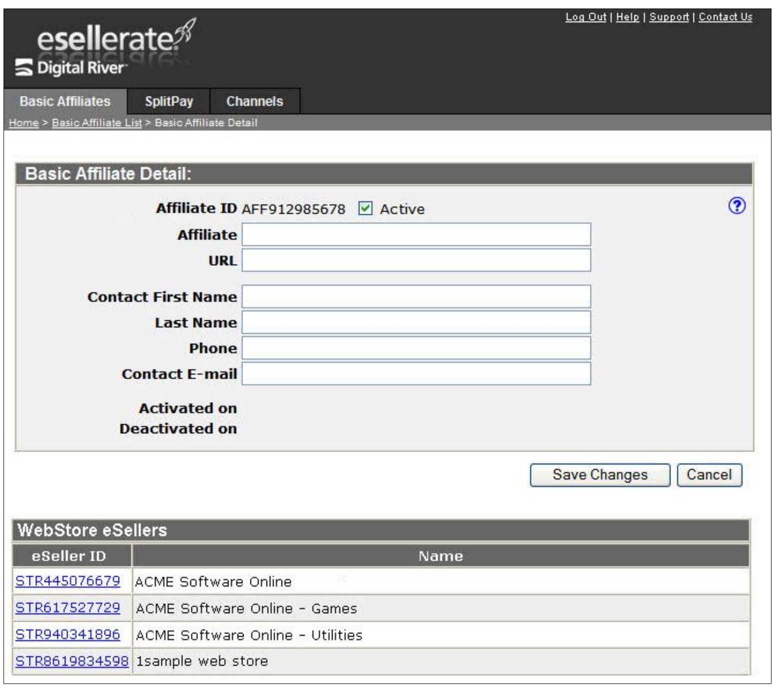
Basic Affiliates

With this option, your affiliates can link to virtually any place in your web store(s), and eSellerate will capture their sales information. You can then use our various reports to determine what to pay each affiliate.

To set up basic affiliate selling:

Create a basic affiliate record

1. Click the **Basic Affiliates** tab. The Basic Affiliate List page appears.
2. Click **New**. The Basic Affiliate Detail page appears. (This page lists all Web Store eSellers for the account.)



3. Enter the affiliate's contact information in the fields provided.
4. You can use statuses (active or inactive) to organize how your affiliates appear in search lists. Also, your searches can include or exclude inactive affiliates. If you're ready to activate this affiliate, click **Save Changes**. (The **Active** check box is selected by default.) Otherwise, you can clear the **Active** check box, save this record and activate it later.

Note: Basic affiliate statuses (active or inactive) are for list purposes only. With either status, the affiliate can sell your products, and eSellerate will track the sales.

Provide the affiliate with links to your stores

1. From the Affiliate List page, select the affiliate and click **Edit**. The Affiliate Detail page appears.
2. You can provide this affiliate with links to any of your web stores. To select a store, click its **eSeller ID** field. A new page appears.
3. In the Basic Affiliate URLs information, click the "click here" link. A page displays basic affiliate links for the web store.
4. Copy any of the links displayed for this affiliate.
5. Send the links to the affiliate.
6. Repeat steps 2-5 to provide the affiliate with as many links as desired.

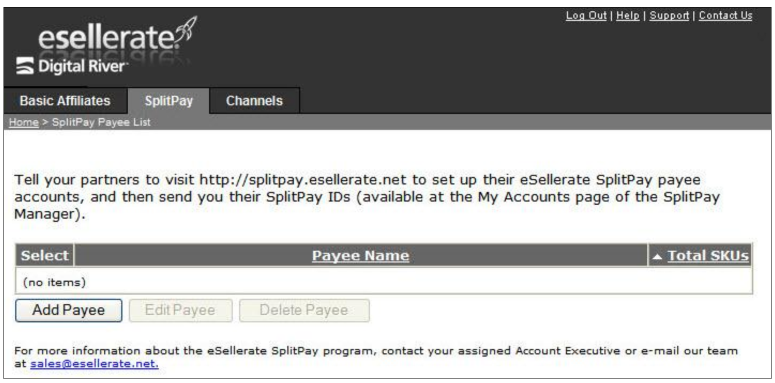
Joining eSellerate SplitPay

eSellerate SplitPay is a program that enables publishers to split the sales proceeds from select SKUs with third parties.

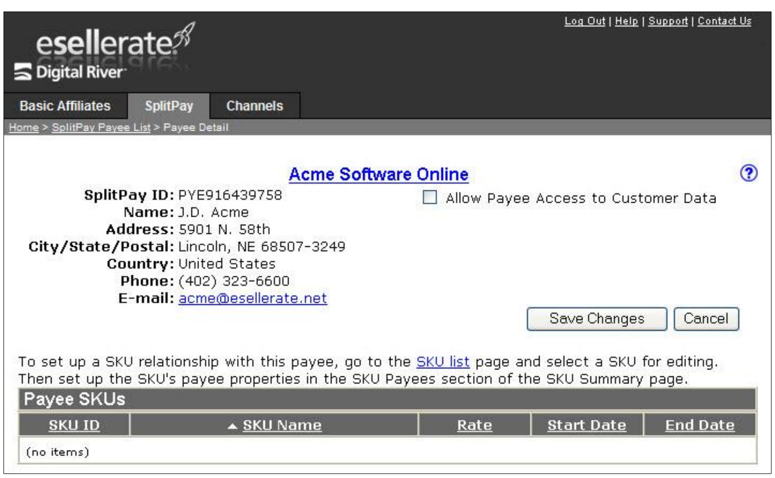
For information on the benefits of this program, go to the Other Sales Partnerships section on the home page of the eSellerate Sales Manager and click **About SplitPay**. (This link will change after you join the program.) The page that appears will outline the steps required to get started in the program.

After joining the program, you can set up split payments as follows:

1. Instruct your partners to do the following:
    1. Visit http://publishers.esellerate.net/splitpay to set up their eSellerate SplitPay payee accounts.
    2. Provide you with their SplitPay IDs (available at the My Account page of the SplitPay Manager).
2. Click the **SplitPay** tab. The SplitPay Payee List page appears.



3. Click **Add Payee**. The Add SplitPay Payee page appears.
4. Enter the payee's SplitPay ID in the field provided and then click **Add Payee**. If you entered a valid SplitPay ID, the payee will receive e-mail notification that you have added it as a payee, and the Payee Detail page will appear.



5. If this payee should have access to customer data, select the **Allow Payee Access to Customer Data** check box and then click **Save Changes**. (Unlike some payee properties, the payee does not receive e-mail notification of this property.) With this option checked, the payee will have access to

the following customer data through SplitPay Manager sales reports:

- Customer name, e-mail address and contact preference
- Serial numbers issued
- Value entered by the customer when a SKU purchase involves a prompt for additional information (which is an option for some serial number sets)
- A button for printing packing slips

6. If you clicked **Save Changes** for step 5, you will need to click **Edit Payee** to return to the Payee Detail page. Otherwise, skip to step 7.
7. Click the link provided to go to the SKU List page.
8. Select a SKU for editing.
9. Set up the SKU's payee properties on the Advanced tab of the SKU Detail page, as described in "Adding the SKU's Payees (Optional)" on page 52.
10. Repeat steps 2-9 for as many payees as required.

Chapter 11 - Layouts

The Layouts section of the eSellerate Sales Manager is for working with the following features:

- "Custom Layouts" on next page
- "Custom Layout Lexicon" on page 296
- "Affiliate Landing Pages" on page 301

Custom Layouts

Available for use with Web Store and Embedded Web Store eSellers, Custom Layouts allow you nearly limitless control over the look, flow and content of your store layouts.

Information on Custom Layouts appears here as follows:

Notes on Custom Layouts

- There are two primary layout options for your web stores: Custom Layouts (described here) and Standard Layouts. Custom Layouts will provide you with a great deal of flexibility for customizing your web stores. Standard Layouts may work for you if you need only limited customization. You can preview the available Standard Layout options on the Web Store eSeller Detail page.
- Custom Layouts are optional for Web Store eSellers and the required layout method for Embedded Web Store eSellers. (Web Store eSellers also work with Standard Layouts, which allow limited customization.) Integrated eSellers do not use Custom Layouts.
- Custom Layouts are defined as normal HTML pages, so you can use any HTML editor to design your layouts.
- eSellerate provides several default layouts that collectively cover all the basic functionality you should need from your Custom Layouts. You will use one of these default layouts as a starting point for any Custom Layout you create.
- Because all Custom Layouts start out as functional layouts, the changes that you make to the default settings can be as minimal as replacing the default banner graphic (banner.jpg) with one of your own.
- Looking at the default layouts is the best way to understand Custom Layouts functionality. Be sure to review the extensive comments in the HTML code.
- A reference that shows how various Custom Layout elements can look when viewed from an HTML editor and when rendered is available for downloading through the eSellerate Downloads page. The link for accessing the downloads is on the Sales Manager home page, under the "What's New for eSellerate" information. (Use the "Custom Layout Quick Reference" link.)
- Custom Layouts use eSellerate HTML extensions that extend the functionality of standard HTML. These special extensions include the following:
  - Commands for controlling the shopping cart behavior
  - Tags for creating loops and conditional statements

    - Functions for performing certain actions or obtaining certain values
    - Variables for reading or setting values
- The following help pages document eSellerate tags, functions and variables. For your convenience when working on layouts that you have downloaded from eSellerate, these pages are accessible without logging in to your publisher account. The URLs are as follows:
    - Tags
      http://publishers.esellerate.net/tags.aspx
    - Functions
      http://publishers.esellerate.net/functions.aspx
    - Variables for use with Custom Layouts
      http://publishers.esellerate.net/customvar.aspx
    - Variables for use in coding Embedded Web Store eSellers
      http://publishers.esellerate.net/embeddedvar.aspx
- For information on development options that are available for getting more capabilities from your Custom Layouts, see "Custom Layout Extensions" on page 288.
- Custom Layouts support the use of cascading style sheets.
- There are no restrictions on the use of scripting languages such as JavaScript and plug-ins such as QuickTime.
- The supported image file extensions are .jpeg, .jpe, .jpg, .gif, .png and .bmp.
- Referencing external images is allowed.
- Non-HTML files that you upload to a layout are automatically placed in a virtual "images" folder. Be sure to include "images/" in the path when you refer to the files in your HTML code. For instance, after uploading an image file named "my_logo.gif" and a CSS file named "my_styles.css" you could refer to the files as follows:
    - <img src="../Resources/Images/images/my_logo.gif">
    - <LINK REL="stylesheet" type="text/css" href="images/my_styles.css">
- To add a favicon (URL icon) to a Custom Layout, you can:
    1. Upload the icon (for example, MyIcon.ico).
    2. Add a "shortcut icon" link to the icon in the <head> tag. For example, add the following in the <head> tag of MyTemplate.htm:
        - <link rel="shortcut icon" href="MyIcon.ico" type="image/x-icon"/>
- eSellerate allows you to easily create mouseover effects for images used in Custom Layouts, without having to provide your own JavaScript. For each image area that should support mouseover effects, you will need to upload two images to your layout: one to display by default and one to display when the user moves the cursor over the image area. Then include the hsrc attribute when using the <img> tag to display the images. eSellerate will insert the required JavaScript for a mouseover whenever a page correctly uses the hsrc attribute. For an example of correct usage, see the following code, which will display the image "menu_off.jpg" by default, and the image "menu_on.gif" for a mouseover:
    - <img border="0" src="images/menu_off.jpg" hsrc="images/menu_on.gif">
- In addition to mouseover effects as described in the preceding item, Custom Layouts allow the use of Javascript onmousedown and onmouseup events. Sample code follows.
    - Test up and down

    > **Caution:** If you add a command tag such as **_Cmd="Buy"** to this line of code, you will need to remove **href="#"**.

- The total disk space allowed for all Custom Layouts is 5 MB. Deleted files are not included in the disk space calculation. See the Custom Layout page for figures on disk space used and remaining.

- There is no limit to the number of Custom Layouts that can concurrently exist in the Sales Manager (though total disk space restrictions apply).
- Each Custom Layout can support an unlimited number of pages.
- eSellerate features that are available only when using Custom Layouts include:
  - Performing custom prompts for each SKU in the order that requires additional information for serial number generation
  - Collecting data with up to 20 custom fields that you define
  - Prefilling data into the purchase process, which allows:
    - Adding multiple SKUs to the shopping cart simultaneously
    - Performing activations for each SKU in the order that requires Product Activation (Embedded Web Store eSellers only)
- Custom fields information is reported in the XML order notice.
- A limitation of Custom Layouts is that layouts used by Embedded Web Store eSellers cannot use frames.

Creating Custom Layouts

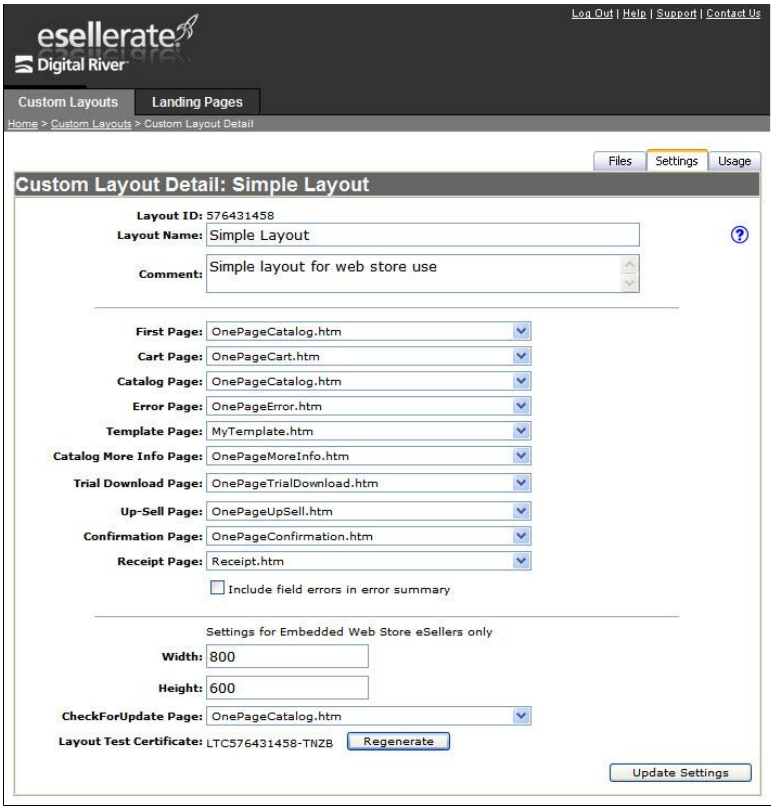
To create a Custom Layout:

1. From the Default Layout Select page, select a default layout to use as a starting point for your new Custom Layout.
2. Click **Create**.
3. Follow the instructions provided at the Custom Layouts Settings and Files tabs to complete your layout. See "Settings Tab" on the facing page and "Files Tab" on page 277.

Assigning Custom Layouts to eSellers

You will assign Custom Layouts at the eSeller level. See "Creating an Embedded Web Store eSeller" on page 320 and "Creating a Web Store eSeller" on page 359.

Settings Tab



When you create a new Custom Layout by using one of the default layouts as your starting point, the Settings tab appears with the **Layout Name** field highlighted. You should replace the default name with a unique one that will help you locate the layout later. The other default settings on the Settings tab should be sufficient in most cases, but you can change them if needed. Information on all the available settings follows.

Note: When you're finished making changes to the Files tab, be sure to click **Update Settings**.

Entering a Layout Name and Comment

If desired, you can enter a layout name and add a comment. Text that you enter here is for your reference only, and will not be visible to your customers.

Note: Duplicate layout names are allowed. However, there is no built-in way to differentiate between duplicate names when you assign layouts to your eSellers.

Making Page Assignments for Key Layout Files

Page assignments specify which HTML layout files eSellerate should use for the store's first page, cart page, catalog page and so on. There is no need to edit the default page assignments unless you have significantly changed the functionality of the HTML layout files that they reference.

The page assignments and their descriptions are as follows:

- First Page: This is the page the store displays first when a customer visits. Also, the store will navigate to this page if a processing error requires the customer to start the purchase process over.
- Cart Page: This page provides the shopping cart functionality.
- Catalog Page: This page displays the available products. With Web Store eSellers, the store will navigate to this page if the customer clicks the "Continue Shopping" link from the Receipt page. To learn how to override this page for an individual Web Store eSeller, see the top section of that eSeller's Detail page.
- Error Page: The store will navigate to this page for any errors not covered by eSellerate error messages.
- Template Page: HTML layout files can reference this file for page header and footer information. A Template Page is not required for the layout to pass inspection, but it is required for the functionality described here. See "Template File" on page 283 for more information.
- Catalog More Info Page: This page displays the referenced SKU's "More Info" Text as set on the Basic tab of the SKU Detail page. A Catalog More Info Page is not required for the layout to pass inspection, but it is required for the functionality described here.
- Trial Download Page: This page displays the referenced SKU's trial download as set at the Web Store SKU Attributes or Embedded Web Store SKU Attributes pages. A Trial Download Page is not required for the layout to pass inspection, but it is required for the functionality described here. See "Adding Embedded Web Store SKUs" on page 323 and "Adding Web Store SKUs" on page 364 for information on setting the trial downloads.
- Up-Sell Page: This page displays the referenced SKU's up-sell information as set at the Up-Sell SKU Detail page. Use of this page requires a special setting at the Up-Sell SKU Group Detail page. An Up-Sell Page is not required for the layout to pass inspection, but it is required for the functionality described here. See "Creating Up-Sells" on page 233 for information on using the up-sell feature.
- Confirmation Page: This page allows customers to review their order information before they submit their orders. The Billing Information section on this page can display payment details. A Confirmation Page is not required for the layout to pass inspection, but it is required for the functionality described here. See also "PayPal Payments" on page 376.
- Receipt Page: This page provides the customer with a receipt at the completion of the purchase. A Receipt Page is not required for the layout to pass inspection, but it is required if you want the ability to customize the receipt. If you do not assign a Receipt Page, a system page will provide the needed functionality. See also "Receipt Page Notes" on page 293.

The **Include field errors in error summary** check box below the page assignments determines how the store displays errors when the customer attempts to proceed to the next page before completing all required input fields:

- If the check box is selected (the default), the store will display an error next to each input field that requires the customer's attention.
- If the check box is cleared, the store will display a summary of field errors, in addition to displaying an error next to each input field that requires the customer's attention. The error summary typically appears at the top of the store page.

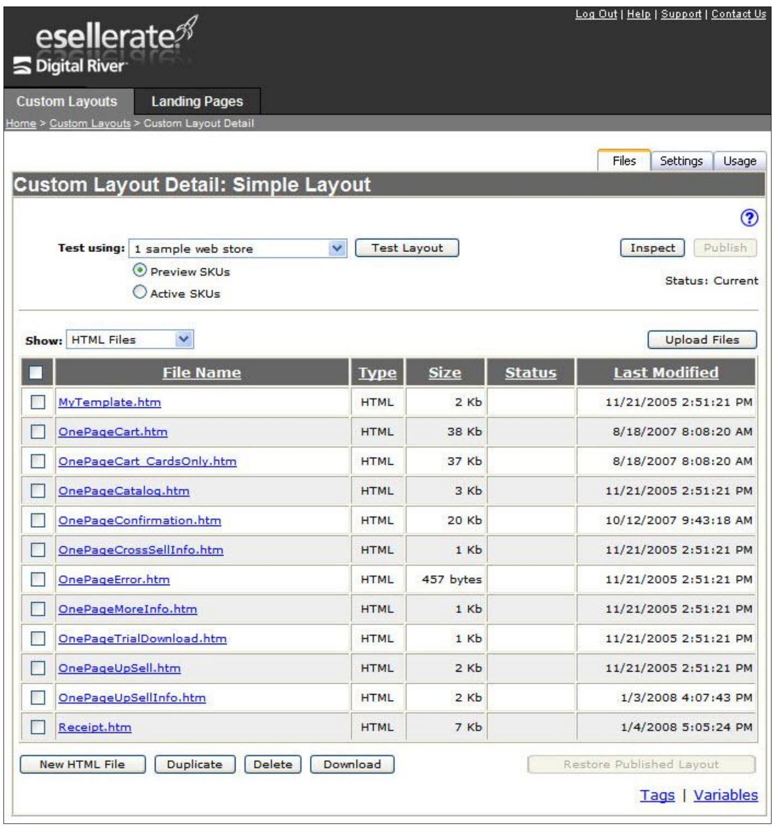
Configuring Layout Settings for Embedded Web Store eSellers (When Applicable)

The **Width** and **Height** fields specify the minimum width and height (in pixels) of the Embedded Web Store eSeller's browser window. These values can be integers only. The allowable values are 100 through 1600 for width and 100 through 1200 for height. As with other settings on this tab, the default width and height values will usually be sufficient.

The **CheckForUpdate Page** list specifies which HTML layout file the Embedded Web Store eSeller should display in response to a CheckForUpdate function call. A CheckForUpdate Page is not required for the layout to pass inspection, but it is required for the functionality described here.

Similar in functionality to a Preview Certificate, the **Layout Test Certificate** allows you to test your Custom Layout before publishing it. When you perform a Purchase or CheckForUpdate function call from your application and use the proper Layout Test Certificate number, the eSeller will use the modified version of your Custom Layout. (You will need to also use the proper Preview Certificate number if you want payment processing to execute in demo mode only, so that no charges occur.) When you're ready to ship this application, just click **Regenerate** to clear the Layout Test Certificate. The next time you perform a Purchase or CheckForUpdate function call from your application, the eSeller will use the published version of the Custom Layout referenced in the call.

Files Tab



You can use the Files tab of the Custom Layouts Detail page to do any of the following:

- List layout files by type
- Edit layout files within the Sales Manager
- Download layout files for offline editing
- Upload completed layout files
- Discard changes made since the last publish date
- Inspect the layout for errors
- Test the layout using any of your Web Store and Embedded Web Store eSellers
- Publish the layout for customer use

More details on the functions provided by the Files tab follow.

Listing Layout Files by Type

All layout files are accessible from the Files tab. Use the **Show** list to list layout files by type, such as HTML files or image files, or to list all files. (Selecting **All Files** will not list deleted files, which must be listed separately.)

A layout file's status will indicate whether it has been created, modified, renamed or deleted since the last publish date. Otherwise, if the file is current, no status will be shown.

Note: Renamed status does not necessarily indicate that only the file name has changed. A file with Renamed status has been renamed, and possibly modified, since the last publish date.

To select layout files for actions such as delete and duplicate, do one of the following:

- To select individual files, select the check box to the left of the file.
- To select all files listed, select the check box in the table heading.

Editing Layout Files Within the Sales Manager

You can duplicate or delete layout files. After deleting a file, you have the option to undelete it at any time before you publish the modified layout. To undelete a file, click the **Show** list and select **Deleted Files**. Select the check box to the left of the desired file and then click **Undelete**.

To add a blank HTML file to the layout, click **New HTML File**. If you need to add another type of layout file, you will need to create the file offline and upload it.

HTML and CSS files allow direct editing within the Sales Manager. To edit one of these layout files, click its **File Name** field to display the Text File Editor page. From that page, you can do any of the following:

- Rename the file
  - Duplicate layout file names are not allowed.
  - The maximum file name length is 255 characters.
- Type or paste in code changes
- Render the HTML code in a new browser window
  - The rendered HTML will show formatting, but it will not read in live data for eSellerate elements such as images and variable values.
  - This option is available on Internet Explorer only. Other browsers do not show a button for rendering the HTML code.
- Revert changes made to the file since the last publish date
- Use the Tags, Variables and Functions links to find information on the eSellerate HTML extensions that extend the functionality of standard HTML
- Save or discard your changes

See also "Styles" on page 281, "Template File" on page 283 and "Variables Notes" on page 284.

Downloading Layout Files

To download layout files to a Zip archive file (.zip) for offline editing, do the following:

1. Use the **Show** list to display the desired layout files.
2. Select the files that you want to download.
3. Click **Download**.

Uploading Layout Files

After working on files offline, you can upload them to your layout.

Points to note before you upload files:

- The maximum number of files that you can upload at one time is 100 when using Internet Explorer for Windows and eight for other configurations.
- Uploading an existing file will replace it.
- The maximum file size allowed for uploads is 128 KB for HTML and CSS files and 1 MB for all other files.
- Duplicate layout file names are not allowed.
- The maximum file name length is 255 characters.
- eSelleratesupports uploading HTML files that have either .htm or .html file extensions. Both will be shown as type HTML within the layout.

To upload files, click **Upload Files** and follow the instructions provided.

Discarding Changes Made to the Layout

If you need to discard changes that you've made to the layout, you can do so for individual files or for the entire layout, as follows:

- To revert changes made to an individual layout file since the last publish date, click the file's **File Name** field, which will bring up the Text File Editor. Then click **Revert Content**. Also note:
  - Reverting will only revert content. If a file has been renamed since the last publish date, the file name will be unchanged.
  - If a file is the only one in the layout that has been modified since the last publish date, reverting the file will change the layout's status back to current.
  - Revert is file name based. If there's not a published file for the file name selected, it can't be reverted.
  - The revert function will only be enabled if the file has been published.
- To restore all changes made since the last publish date, click **Restore Published Layout**. This will restore the Files and Settings tabs to the configuration of the published layout. Also note:
  - If a file has been deleted since the last publish date, it will be restored.
  - If a file has been renamed since the last publish date, the restored file will use the original file name.
  - Layout Name, Comment and Test Layout Certificate on the Settings tab will not be restored.

Inspecting the Layout

Inspection is a process that you can initiate to check that the eSellerate tags, commands and defined variables are correctly used, so the layout functions properly within the eSellerate system. Inspection does not take into account any Sales Manager store settings (such as eSeller or SKU configurations set up in your eSellerate account) that may affect your layout.

Inspection proceeds in two phases:

- Syntax analysis phase:
  - eSelleratechecks the structure of all HTML files in the layout (deleted files are excluded).
  - At most, one syntax error will be reported per file.
  - If any syntax error is found, inspection will be terminated and the error(s) will be reported on the Inspection Results page.
- Semantic analysis phase:
  - Inspection checks the usage of eSellerate tags, commands and defined variables in all files. Errors or warnings will be reported on the Inspection Results page.

- Warnings (which you can choose to ignore, but could cause runtime errors)
- Errors (which you must correct before the layout can pass inspection and you can publish the layout)

A few important points to help you avoid errors in the inspection process are as follows:

- Avoid basic syntax errors by using proper HTML structure.
- Do not begin your file names with an underscore. File names that begin with an underscore are reserved for use by eSellerate.
- Make sure to designate HTML pages on the Settings tab as First Page, Cart Page, Catalog Page and Error Page. These settings are required and must reference existing HTML pages in your layout. All other page settings are optional.
- Use no more than one pair of each of the following tags in an HTML file: BODY, FORM and _CONTENT.
- Make sure eSellerate commands and tags contain required attributes, such as the following:
  - _Cmd "Buy" and _Cmd "Remove" require _SkuRefNum.
  - _Cmd "GOTO" requires _Page.
  - <_Loop> tags must have VAR attribute referencing a valid specifier. The possible specifiers are _Cart, _Catalog, _Category, _CrossSell, _Order and _Shipping.
  - See the Tags page for a complete list of eSellerate commands and tags. Items in bold red indicate required attributes.
- Make sure your layout contains all eSellerate "Required" variables. These are indicated at the pages that list variables for use with Custom Layouts and variables for use in coding Embedded Web Store eSellers.
- Do not include opening or closing brackets in variable name values that you assign. If you need to display information enclosed in brackets, you can use button graphics to provide that look.

Warnings indicate there may be an issue that needs to be addressed in your layout, depending on the Sales Manager store settings used in conjunction with the layout. For example:

- A warning will be logged if any eSellerate conditionally required variables (denoted with orange checkmarks in the variables table) are not present in any HTML file. For instance, if _Shopper.ShippingAddress1 is not present, a warning will be displayed. Shipping is only required if one or more of your eSeller SKUs require shipping, or if you are using eSellerate's eCD feature. If this is the case, all conditionally required shipping variables will need to be defined in your layout to properly handle shipping in orders that require it. At runtime, if these variables are not present and shipping is required, the eSellerate system will present an emergency input page that requires the customer to enter this information.

Testing the Layout

The Files tab provides an interface for testing the layout against any of your Web Store and Embedded Web Store eSellers.

Note: In contrast to eSeller testing methods such as the Preview URL for web stores, this test uses the edited version of the layout, rather than the published version. As a reminder of this distinction, an "UNPUBLISHED LAYOUT" banner will display at the bottom of the store pages.

To test the layout, do the following:

1. In the **Test using** list, select the desired eSeller.
2. Do one of the following:
   - If you would like to test the layout with a preview order, select **Preview SKUs**. In this case, the test will automatically use the Preview Certificate assigned to the eSeller in use, and the Layout Test Certificate assigned to the layout. As with all preview orders, eSellerate's preview banner will display at the bottom of the store pages, and payment processing will

execute in demo mode only, so that no charges occur.

- If you would like to test the layout with an actual order, select **Active SKUs**. Please note that actual charges to your payment method will occur if you complete the order.

3. Click **Test Layout**. This will open a new browser window, which in the case of Embedded Web Store eSellers will honor the width and height settings configured in the Settings tab.

Publishing the Layout

A layout can have one of three statuses:

- Current, which indicates the layout has not been edited since the last publish date
- Modified, which indicates the layout has been modified since the last publish date, but has not yet passed inspection
- Pending, which indicates the layout has been modified since the last publish date and has passed inspection, but has not yet been published

Publishing a layout replaces the previous layout and makes the new layout available for use with your active Web Store and Embedded Web Store eSellers. Before you click **Publish**, be sure to test the layout using the eSellers your customers will be using.

> **Warning:** Publishing a layout can affect stores that are in use by your customers. For this reason, it is advisable to publish your layouts at times when you can expect low customer traffic. If layout changes during a customer visit are significant enough to cause an error, the store will display the following message: "This store has just been updated. To ensure an accurate purchase process, please start over, beginning here." The customer can click the provided link to start over from the page designated as First Page on the Settings tab.

Styles

Custom Layouts support the use of cascading style sheets, which are grouped under CSS Files on the Files tab. You can use style sheets to control the formatting attributes of multiple HTML layout files. Like the template file, style sheets offer the advantage of keeping reusable code in one central location, so you can change the formatting of all files that use the style sheet by editing just one file.

Using Style Sheets

Use proper HTML structure when creating and linking to style sheets. The style sheets and HTML files included with every default layout provide examples of proper structure. To see code that defines a cascading style, open the default style sheet, styles.css. Open any of the default template files (MyTemplate.htm) to see how to link to a style sheet with a <LINK> tag, and how to apply specific styles.

Customizing eSellerate System Page Styles

This section focuses on eSellerate system pages that are displayed when applicable during order processing. The pages listed here are system generated, and are not defined within the Custom Layout. For that reason, these pages do not support full customization.

The following system pages are not customizable:

- Store Login (for private web stores)
- Page Not Found
- Policy
- CSC What's This
- eCD What's This
- eDP What's This

- VAT What's This
- Volume Discounts
- Message (used if unable to display the error page configured on the Settings tab)
- Payer Authentication

System pages that support limited customization are:

- Terms of Sale
- Duplicate Order Warning
- Processing Order

Although you cannot edit these system pages, you can affect the way they display by defining specific styles in their style sheets. Information that you can use in your customization follows.

Required Files

Your layout will need to include the following files:

- The default style sheet, styles.css, or another style sheet that includes the default styles from that file
- The default template file (MyTemplate.htm), which must use the style sheet described in the preceding bullet

Required Styles

The required styles and their default values as found in styles.css appear in the following list.

Selector	Function
.duporder_bodyfont {font-family: verdana; font-size: 11px}	Formats the following text on the Duplicate Order Warning page: • Name, quantity and price of order items that are duplicates from a recent order • "For information on the previous order, you can visit the eSellerate Support page and use your e-mail address to look up your order history. Otherwise, click 'Continue' to proceed with the purchase or 'Cancel' to return to the previous page."
.duporder_inputSubmit {color: #000000; font-family : verdana; font-size: 10px; font-weight: bold}	Formats the text for "Cancel" and "Continue" buttons on the Duplicate Order Warning page
.duporder_errorheader {font-family: verdana; font-size: 11px; font-weight: bold}	Formats the following text on the Duplicate Order Warning page: "POSSIBLE DUPLICATE ORDER"
.duporder_errormessage {font-family: verdana; font-size: 11px}	Formats the following text on the Duplicate Order Warning page: "Another order placed in the past 7 days also used your e-mail address and included the item(s) below:"
.duporder_labelbackground {background-color: #f1f1f1}	Sets the background color for the following text on the Duplicate Order Warning page: "Product Quantity"

Selector	Function
.duporder_labelheader {font-family: verdana; font-size: 11px; font-weight: bold}	Formats the following text on the Duplicate Order Warning page: "Product Quantity"
.processing_bodyfont {font-family: verdana; font-size: 11px}	Formats the following text on the Processing Order page: "Order processing typically occurs in seconds, but can take up to two minutes, depending on your payment method."
.processing_labelheader {font-family: verdana; font-size: 11px; font-weight: bold}	Formats the following text on the Processing Order page: "Please wait while your order is processed..."
.terms_header {font-family: verdana; font-size: 11px; font-weight: bold}	Formats the following text on the Terms of Sale page: "Terms of Sale: <SKU Name>"
.terms_inputBox {font-family: verdana; font-size: 10px; background-color: #FFFFFF; border: 1px solid #D2D2D2;}	Formats the following items on the Terms of Sale page: • Terms of sale text • The box containing the terms of sale text

Style Sheet Class References for Styles.css

Template File

With this feature, you can store frequently used header and footer information in a template file and link that template to every layout file that should use it. Keeping the header and footer information in one central location simplifies the layout files, reduces the chance for errors and allows you to change the design by editing just one file.

Notes on the Template File

- Every default layout includes a template file that you can use as a starting point for your template. All other HTML files in the layout are already set up to use the template, so the only time you'll need to add special tags as described here is when you're starting from scratch.
- There can be only one template file per layout.
- A template file is not required.
- The Template Page list on the Settings tab designates the template file for a layout.
- HTML and CSS layout files can use the special eSellerate tag <_CONTENT> to enable template functionality. An overview of the <_CONTENT> tag follows:
  - One pair of <_CONTENT> tags is allowed per file.
  - The template file must include the shared header and footer information, and an empty pair of <_CONTENT> tags that define where to embed code defined in the layout files.
  - Layout files that use the template must include a pair of <_CONTENT> tags that enclose the code to be embedded.
  - All files that include a pair of <_CONTENT> tags must also include a pair of <body> tags.
  - See "Sample Code for Using <_CONTENT> Tags" on next page.
- The following eSellerate system pages will use the template file, if one is designated:
  - Terms of Sale
  - Duplicate Order Warning
  - Processing Order

- If a Template Page is not designated for the layout, the forenamed eSellerate system pages will still display their content.
- A template file can use styles.
- All pages that use the template file will use the title defined by <TITLE> tags in the template.

Sample Code for Using <_CONTENT> Tags

The following code demonstrates how to use <_CONTENT> tags in template files and layout files, respectively. Note the required use of <body> tags in conjunction with the <_CONTENT> tags.

```
MyTemplate.htm:
<html>
<body>
   A. Common page header goes here
   <_CONTENT>
      (irrelevant, page specific content B goes here)
   </_CONTENT>
  C. Common page footer goes here
</body>
</html>

MyPageOne.htm:
<html>
<body>
   (irrelevant, will be replaced by template header A)
    <_CONTENT>
       B. Put MyPageOne specific content here
    </_CONTENT>
   (irrelevant, will be replaced by template footer C)
</body>
</html>
```

Variables Notes

eSellerate variables are essential components of both Custom Layouts and the eSellerate Embedded Web Store SDK. The many uses for eSellerate variables include store functions such as adding a SKU to the shopping cart, and SDK functions such as purchasing software from inside the application.

Note: This help topic describes defined eSellerate variables. There are two other kinds of eSellerate variables—arbitrary (ad hoc) and string—that you can use in addition to eSellerate variables. For more information on the other two types of variables, see "Ad Hoc Variables" on page 292 and "Localizing eSellerate Stores" on page 382.

Finding Information on eSellerate Variables

The primary resources for eSellerate variables information are as follows:

- Variables help pages
  - For a listing of all eSellerate variables that can be used with Custom Layouts, use the link displayed on the Text File Editor page when you edit individual HTML layout files, or use the following URL: http://publishers.esellerate.net/customvar.aspx.
  - For a listing of all eSellerate variables that Embedded Web Store eSellers can prefill or pull from result data, use the link displayed on the code samples page (accessible from the API

section of the Embedded Web Store eSeller Summary page), or use the following URL: http://publishers.esellerate.net/embeddedvar.aspx.

    - All Embedded Web Store eSellers can set a variable's value through prefill and read a variable's value from result data, except for those eSellers that are integrated with REALbasic applications. The Embedded Web Store option for REALbasic does not support these actions.

  - Also note:
    - For your convenience when working on layouts that you have downloaded from eSellerate, the variables help pages are accessible without logging in to your publisher account.
    - Both of these pages allow exporting the variables information as a comma-separated file.
    - To view variables help, hover your mouse over the variable name, or click the bullet to the left of the variable.
    - "Required" indicates that a variable must be in the layout to enable eSellerate store functionality. Note that some variables are required only under certain conditions; see variables help for more information.
    - "Can Edit" indicates that a variable's value can be set on a Custom Layout page by the user. Some variables that can be edited by the user cannot be prefilled, and vice versa.
    - "Can Prefill" indicates that a variable's value can be set through prefill. Some variables that can be prefilled cannot be edited by the user, and vice versa.
    - "Loop Only" indicates that the variable can only be used within eSellerate <_Loop> tags. See the Tags page for more information.
    - "In Result" indicates that a variable's value is returned to the eSellerate Embedded Web Store SDK, and is therefore available for retrieval through SDK calls.
    - "Page" indicates that the variable can only be used on the specified layout page.
    - "New" indicates that eSellerate added the variable in the most recent variables update.
- The Tags page
  - The Tags page shows how the following eSellerate HTML extensions work in conjunction to extend the functionality of standard HTML:
    - Commands
    - Tags
    - Variables
  - To view the Tags page, use the following URL: http://publishers.esellerate.net/tags.aspx.
- HTML files in the default layouts
  - The numerous HTML files included with every default layout provide working examples of variables usage. Be sure to review the extensive comments in the HTML code.

Notes on Using eSellerate Variables

- The red bullet for required fields will display automatically at runtime for all required variables. These include variables marked "Required" on the variables help pages, and variables that you have made required (as explained below).
- You can make any variable (including one of your own) required. For more information, see the "Input Validation" section of the Tags page at http://publishers.esellerate.net/tags.aspx.
- Values can be directly assigned to variables—either defined or ad hoc—by using the assignment operator "=", when the assignments are enclosed in eSellerate <_OnLoad> or <_OnPost> tags. For more information, see "Assignment Statements" on page 292.

- All rate fields, such as for the variable _Cart.TaxRate, will automatically include a percent sign.
- For customer privacy reasons, the value returned for the variable _Shopper.PaymentCardNumber will only show the last four digits of the card number.
- There are 20 variables reserved for you to use as needed for collecting data. The variable names are _Custom.Data0 through _Custom.Data19. Also note:
    - The _Custom.Data variables are strings with a limit of 4,000 characters.
    - eSellerate provides three options for viewing or accessing the _Custom.Data variables returned in orders:
        - The XML order notice (available through Account Information)
        - The Order Detail page (available through any search or report that lists orders)
        - The Order Lookup Web Service (see "Using the XML Order Notice" on page 151)
    - Do not use _Custom.Data variables on receipt pages. Instead, use one of the 20 reserved _ Order.CustomData variables (named _Order.CustomData0 through _Order.CustomData19), which are the receipt page equivalents of _CustomData variables. For example, if you use _ Custom.Data4 to receive and store customer input during a purchase, you would display that data on the receipt page with _Order.CustomData4. The _Order.CustomData variables allow receipts to show custom data after the purchase session has ended, so customers will be able to view that information when looking up their orders in After-Purchase Services.
- Variables listed as type "Link" create hyperlinks, and are represented as one variable per link. At run-time, these links will render the required label and URL associated with the variable. They will always open a new browser window when clicked.
- To display text such as "FREE SHIPPING" when a coupon provides that discount, you can base a condition on the value of _Shopper.CouponType, which will be SHIPPING if shipping is free.
- You can use _Layout.PreviousPage to create Back button functionality. The variable will return blank if there is no previous page. Also note:
    - The button can be hidden via _visible="Layout.Previouspage!="
    - An example of a visible back button follows: <input name="submit01" type="submit" value="back" calls="inputSubmit" _cmd="goto" _page="_Layout.PreviousPage">
- To display a More Info link for a catalog item, your code will need to do the following:
    1. Check the value of _CatalogItem.MoreInfoIsAvailable. If the value is true, continue with the next step.
    2. Create a link to the page designated as Catalog More Info Page on the Settings tab. The name of that page is accessible through _Layout.CatalogMoreInfoPage. (Alternately, you can link to any page that is set up to display the required information.)
- To display a More Info link for a cross-sell item, your code will need to do the following:
    1. Check the value of _CrossSellItem.MoreInfoIsAvailable. If the value is true, continue with the next step.
    2. Check the value of _CrossSellItem.MoreInfoExternalURL. If the value is true, create a link using the target URL that is accessible through _CrossSellItem.MoreInfoExternalURL. If the value is false, create a link to the page designated as Catalog More Info Page on the Settings tab. The name of that page is accessible through _Layout.CatalogMoreInfoPage. (Alternately, you can link to any page that is set up to display the required information.)
- When using prefill to add an item to the shopping cart and apply a coupon, including _eSellerate.Options prefilled with "PREVALIDATECOUPON" instructs eSellerate to validate the coupon immediately, rather than at the next form post. This allows the discounted amount to display immediately, if included on the layout page. Also note:
    - To accomplish the same immediate validation with a "Buy" URL for an eSellerate web store that uses Custom Layouts, include "&options=PREVALIDATECOUPON" in the URL. Also see "Prefilling Coupon ID" on page 245.

  - Do not use this option for coupons that require user input, such as adding more items to the cart or entering an e-mail address used for previous purchases. Coupons such as these that eSellerate cannot immediately validate will cause errors.
- When using prefill to add an item to the shopping cart, including _eSellerate.Options prefilled with "CLEARCART" instructs eSellerate to clear the cart before adding the new item.
- Variables can be conditional as to when they are required and visible to the customer. (See the variables help pages for information on which variables are conditionally required.) Some variables have built-in capabilities for knowing when they don't pertain, which saves you from having to conditionally hide them with <span _ if="_variable"> logic. The variables with these capabilities are as follows:
  - _Cart.GrandTotal
  - _Cart.CurrencyMessage
  - _Cart.TransactionMessage
  - _CartItem.SerialNumberPromptedData
  - _Shipping.ECDShippingMessage
  - _Shipping.SelectedShippingRefNum
  - _ShippingItem.Amount
  - _ShippingItem.Description
  - _Shopper.PaymentCardCSC
  - _Shopper.PaymentCardMonth
  - _Shopper.PaymentCardNumber
  - _Shopper.PaymentCardYear
  - _Shopper.ShippingAddress1
  - _Shopper.ShippingCity
  - _Shopper.ShippingCountry
  - _Shopper.ShippingFirstName
  - _Shopper.ShippingLastName
  - _Shopper.ShippingState
  - _Shopper.ShippingZip
  - _Shopper.VatID
  - Images/_AcceptedPayments.gif
  - Images/_SSL.gif
  - Images/_Trustmark.gif
- Some variables return empty strings when unavailable or inappropriate. This applies to the following link variables (which are all optional):
  - _CartItem.ECDAvailableLink
  - _CartItem.EDSAvailableLink
  - _CartItem.SerialNumberPromptHelpLink
  - _CartItem.VolumeDiscountLink
  - _CatalogItem.VolumeDiscountLink
  - _eSeller.PrivacyPolicyLink
  - _eSeller.ReturnPolicyLink
- To ensure that data is available when needed, variables placement in layouts must reflect current Sales Manager store settings. A few examples related to coupons are:
  - Coupon entry should occur after all SKUs eligible for the coupon discount are already in the shopping cart.
  - Coupon entry should occur before the presentation of shipping costs.

See Also

"Ad Hoc Variables" on page 292

"Receipt Page Notes" on page 293

Prefilling Data

One eSellerate feature that is unique to Custom Layouts is the ability to prefill data into the purchase process. Prefill allows you to pass some or all of the input data required for the purchase. You can use prefill to pass data that the user would otherwise have to enter, and to handle functions such as adding multiple SKUs to the shopping cart at once.

Notes on prefill

- Prefill is available for all Web Store eSellers and most Embedded Web Store eSellers. The exception is that prefill is not available for Embedded Web Store eSellers that integrate with REALbasic applications.
- Features that are available through prefill include:
    - Passing input data required for a purchase
    - Adding multiple SKUs to the shopping cart simultaneously
    - Performing activations for each SKU in the order that requires Product Activation (Embedded Web Store eSellers only)
- To find out what data can be prefilled, see the variables marked "Can Prefill" on the following variables help pages:
    - For a listing of all eSellerate variables that can be used with Custom Layouts, use the link displayed on the Text File Editor page when you edit individual HTML layout files, or use the following URL: http://publishers.esellerate.net/customvar.aspx.
    - For a listing of all eSellerate variables that Embedded Web Store eSellers can prefill or pull from result data, use the link displayed on the code samples page (accessible from the API section of the Embedded Web Store eSeller Summary page), or use the following URL: http://publishers.esellerate.net/embeddedvar.aspx.
- Web Store eSellers can prefill data by doing a form post to a secure eSellerate web site at https://secure.esellerate.net/secure/prefill.aspx. The secure site processes the prefill data and then redirects it to the eSellerate store servers. A sample template for doing form posts is available for downloading through the eSellerate Downloads page. The link for accessing the downloads is on the Sales Manager home page, under the "What's New for eSellerate" information. (Use the "Web Store Prefill Example" link.)
- Embedded Web Store eSellers can prefill data by using SDK functions to communicate with the eSellerate store servers through a secure channel. For information on those functions, see Chapter 1 of the eSellerate SDK Reference.
- Prefill allows you to bypass some but not all portions of the user interface. At a minimum, your layout will need to include an HTML page with a Submit Order button.

Custom Layout Extensions

With the features described here, you can code your Custom Layouts to do things that otherwise would be difficult or not even possible.

While the possibilities are wide ranging, the key point is that these development options allow more communication in and out of web pages, so information from different places can be used to improve the purchase experience.

The features providing the extended functionality are eSellerate functions, ad hoc variables and assignment statements. These features extend—rather than modify—regular Custom Layouts functionality. Consequently, they do not impose new requirements on layouts, and Custom Layout inspection (both in the Sales Manager and in stores) ignores them.

See Also

"eSellerate Functions" below

"Ad Hoc Variables" on page 292

"Assignment Statements" on page 292

eSellerate Functions

Note: A summary of the following functions is available at http://publishers.esellerate.net/functions.aspx. To make this information easy to find, the Custom Layout editing pages provide a link to the summary (labeled "Functions"), in the same area as the "Tags" and "Variables" links.

Just as defined eSellerate variables denote certain preserved values, there are defined eSellerate functions that denote certain processes or processed values. The function names are case-insensitive, are preceded by an underscore, and are followed by a parenthesized, comma-separated argument list. They are replaced by evaluated values when the Custom Layout page containing them is rendered. Functions that are not recognized or cannot be evaluated remain unchanged when rendered.

All functions return strings; some functions, whose only purpose is an action, always return blank strings. All functions also have a shorter alternative name that can be used instead of their fuller descriptive name.

Functions may contain variables, and they can be nested. For example:

```
<Span _If="_Shopper.BillingFirstName != "">
  <_OnLoad>
    _My.Welcome = _Concatenate(
      _QueryToUrl("http://vendor.com?get=welcome"),
      " ",
      _Shopper.BillingFirstName
    )
  </_OnLoad>
  _My.Welcome
 </Span>
```

Also, note that inside expressions: 1, string literals must be single-quoted; and 2, evaluations you want treated as strings must be single-quoted.

eSellerate Functions	
Concatenate	Takes any number of string arguments, appends them into a single string, and returns that string. (Short name: **Append**.)
StringContains	Takes two string arguments, and returns "True" if the second string is a substring of the first, or "False" otherwise. The matching is case-insensitive. (Short name: **IsSubstring**.)

eSellerate Functions	
StringIsLike	Takes two arguments—the first a string, the second a regular expression—and returns "True" or "False", depending on whether the string matches the regular expression. The matching is case-insensitive. (Short name: **IsMatch**.)
FindInString	Takes two strings as arguments, and returns the zero-indexed position of the second string inside the first, if it is a substring. If the second string isn't a substring of the first, "-1" is returned. The substring matching is case-insensitive. (Short name: **Position**.)
GetFromString	Takes two or three arguments. The first argument is a source string, from which a substring is extracted and returned. The second argument is the zero-indexed position of the extracted substring within the source string, and the optional third argument is the length of the substring. If this length is omitted or overlong, the extracted substring extends to the end of the source string. (Short name: **Substring**.)
ReplaceInString	Takes three arguments, and returns the string created by replacing all occurrences of the second argument within the first argument with instances of the third argument. The matching of the second argument is case-insensitive. (Short name: **Replace**.)
EvaluateBooleanExpression	Takes a single argument in the form of a Boolean expression, evaluates it just as it would an _If attribute in a <span> tag, and returns either "True" or "False", as the case may be. Also, note that inside expressions: 1, string literals must be single-quoted; and 2, evaluations you want treated as strings must be single-quoted. (Short name: **IsTrue**.)
EvaluateNumericExpression	Takes a single argument in the form of a numerical expression, evaluates it just as it would the numerical portion of an _If attribute in a <span> tag, and returns the resulting number as a string. Also, note that inside expressions: 1, string literals must be single-quoted; and 2, evaluations you want treated as strings must be single-quoted. (Short name: **AsNumber**.)
GetQueryStringValue	Takes one argument, the name of a desired variable in the current query string, and returns its value, or blank if the query string doesn't include the variable. (Short name: **FromUrl**.)
GetXmlValue	Takes two arguments—a text string and the name of a desired markup tag—and returns the content of the so-named tag in the text string, or blank if the text string does not contain the tag. For example, if the desired tag name is "result", the function returns the first and innermost instance of text enclosed between <result> and </result> delimiters. (Short name: **FromXml**.)

eSellerate Functions	
GetCookieValue	Takes one or two arguments. The first argument is the name of a desired cookie value; the second is optional. The function returns the cookie value, or blank if the cookie does not contain a so-named value within the current scope, which by default is the particular web store being visited. However, cookie values can optionally be specified to instead have the particular publisher for their scope, in which case a second argument of either "scope=publisher" or "scope=vendor" is needed in order to retrieve the value. (Short name: **FromCookie**.)
AddCookieValue	Takes named arguments, creates a cookie, and returns blank. If either "scope=publisher" or "scope=vendor" is among the named arguments, then the scope of cookie values added by the function will be that of the current publisher; otherwise, by default, the scope is that of the current web store. The duration of the cookie value can be optionally specified by an argument named "duration" given an integer value. That value specifies the number of days that the values added by the function should persist. Or that value may be followed by "m", to indicate minutes, rather than days. For example, added cookie values will expire after one hour if accompanied by the argument "duration=60m". If no duration is given, the added cookie values will expire after 30 days. All other named arguments will be taken as naming cookie values to be added by the function. For example, a publisher could preserve a coupon in a cookie that could be accessed by any of their web stores during the upcoming week: **_AddCookieValue**("scope=publisher", "duration=7", "coupon=BigDeal", "name=_Shopper.FirstName") (Short name: **Cookie.**)
QueryToUrl	Takes one or two arguments. The first argument is a URL; the function queries the URL, and returns the response from the query. An optional second variable named "timeout" can be used to specify a timeout value for the query, as measured in tenths of a second. If not specified, the default timeout for queries by the function is two seconds. The function returns blank if the query times out or otherwise fails. (Short name: **Query**.)

eSellerate Functions	
PostToUrl	Is very like _QueryToUrl, but additionally posts data formatted as XML to the URL. Additional named arguments are taken as specifying tagged values to be included in the XML. For example: **_PostToURL**("http://dot.com", "timeout=10", "UserID=John Smith", "Password=Pocahontas") will wait up to one second for a response to posted data: <?xml version="1.0" encoding="UTF-8"?> <request> <UserID>John Smith</UserID> <Password>Pocahontas</Password> </request> (Short name: **Post**.)

eSellerate Functions

Ad Hoc Variables

The capacity to preserve values is extended beyond defined eSellerate variables to arbitrary, on-the-fly variables. These variables are denoted by the prefix _My., and persist throughout the web store visit, but not beyond it. As a server safety precaution, values are truncated to 4,000 characters in cases where they would otherwise be longer. If a variable is referenced before it is assigned a value, its value is blank.

See Also

Defined eSellerate Variables – "Variables Notes" on page 284

Assignment Statements

Note: A summary of the following information is available on the eSellerate Tags page (under "Value Assignment") at http://publishers.esellerate.net/tags.aspx.

Values can be directly assigned to variables—either defined or ad hoc—by using the assignment operator "=", when the assignments are enclosed in eSellerate <_OnLoad> or <_OnPost> tags.

The tags can enclose one or more assignments. The variable to the left of the assignment operator can be either a defined eSellerate variable or an ad hoc _My variable. The value to the right can be another variable, a literal value, or an eSellerate function.

<_OnLoad> or <_OnPost> tags can be enclosed in other tags—for example, in <_Loop> or conditional <Span>—but cannot themselves enclose other tags.

<_OnLoad> assignments occur when the page is loaded or refreshed. <_OnPost> assignments occur when page inputs are submitted.

In the following example, the result of an eSellerate function is assigned to an ad hoc variable. That variable is then used in further eSellerate functions to obtain a value assigned to a second variable.

```
<_OnLoad>
   _My.LoginReply =
      _PostToURL(
        "http://vendor.com",
        UserID=_My.UserName,
        Password=_My.Password
      )
```

```
   _My.IsValidUser =
      _EvaluateBooleanExpression(
         '_GetXmlValue(_My.LoginReply, "result")' ~= 'success'
      )
</_OnLoad>
```

Receipt Page Notes

On February 6, 2008, eSellerate introduced the ability to customize online receipts for eSellers that use Custom Layouts. Prior to that release, an eSellerate system page provided the receipts for all purchases. The changes to allow customizable receipts included adding the following elements to Custom Layouts:

- A receipt layout page, which is included with all default layouts
- A page assignment for setting each layout's receipt page
- Several new eSellerate variables for use on the receipt page

Layouts that you create after February 6, 2008, (using a default layout as your starting point) will use a customizable receipt by default. These layouts include a Receipt.htm layout file, which looks and functions the same as the system page that previously had provided the receipts for all purchases. You can edit the default Receipt.htm to customize the receipts in any of your layouts. Your edits will affect the receipts shown at the conclusion of a purchase, and those that are accessible through the eSellerate After-Purchase Services web site (http://store.esellerate.net/support).

If you choose to use the default Receipt.htm without modifications, there is nothing additional that you need to do in regard to the receipt page. You can inspect, test and publish your layouts as you normally would.

If you choose to customize the default Receipt.htm or one of the other sample receipts that eSellerate provides, please see the following notes for more information.

Notes on customizable receipts

- This feature is not available to Integrated eSellers because it requires Custom Layouts.
- The Receipt Page setting in the page assignments specifies the receipt layout file. This page is set to "Receipt.htm" by default. (You make page assignments on the Settings tab of the Custom Layouts Detail page.)
- A system page provides the receipts for layouts that do not have a Receipt Page assigned.
- As a general rule, when customizing receipt pages, you should avoid using variables that are not part of the "_Order..." or "_Tracking..." groups. "_Order..." and "_Tracking..." variables can only be used on the receipt page (more information follows), and they also are (typically) the only variables that you should use on receipts.
- Thirty-nine eSellerate variables were added for customizable receipts. Also note:
  - Variables that can only be used on the receipt page are marked as "Receipt" on the variables help page (http://publishers.esellerate.net/customvar.aspx). The inspection process will fail (on a publish attempt) if you include a "Receipt" variable on a layout page other than the assigned receipt page.
  - See the provided help for information about these variables. (To view help, hover your mouse over the variable name, or click the bullet to the left of the variable.)
- Do not use _Custom.Data variables on receipt pages. Instead, use one of the 20 reserved _Order.CustomData variables (named _Order.CustomData0 through _Order.CustomData19), which are the receipt page equivalents of _CustomData variables. For example, if you use _Custom.Data4 to receive and store customer input during a purchase, you would display that data on the receipt page with _Order.CustomData4.
- To hide elements that should not be on the receipt when customers view it from After-Purchase Services, you can use the _Order.IsSupport variable. The value of _Order.IsSupport is true if the eSellerate system is showing the receipt page from After-Purchase Services. This allows conditional use

of Span tags to prevent showing variables that are not available after the purchase session ends. An example follows:

  - _variable

- Your testing of receipt pages should include receipts generated at the conclusion of a purchase, and those that are accessible through After-Purchase Services.
- In addition to the default Receipt.htm, eSellerate provides other sample receipts that you can download and customize for your own use. These samples are available for downloading through the eSellerate Downloads page. The link for accessing the downloads is on the Sales Manager home page, under the "What's New for eSellerate" information. (Use the "Custom Receipt Default Examples" link.)
- One of the receipt samples demonstrates how to pass eSellerate sales information to Google Analytics. The code that provides the tracking functionality is at the bottom of the receipt page, enclosed by Span tags.
- If you adapt the Google Analytics sample for your own use, you will need to replace two placeholder values in the block of code listed below. The values that you will need to replace with your own are "UA-XXXXXXX-X" in the first line, and "yoursite.com" in the third line.
  - var pageTracker = _gat._getTracker("UA-XXXXXXX-X");
pageTracker._initData();
pageTracker._setDomainName("yoursite.com");
- eSellerateprovides defined variables specifically for use with tracking. These variables can only be used on the receipt page, and include "Tracking" in their names to differentiate them from variables that you would use for display or other purposes. Also note:
  - Tracking variables that refer to currency amounts (such as _TrackingItem.PriceEach) return the U.S. dollar amount, regardless of the currency that was selected in the shopping cart.
    - We do not recommend using these variables to display currency amounts on your receipt pages, which could confuse your customers by showing multiple currencies for their orders. As with all the tracking variables, the sole purpose of these variables is to track web statistics.
  - Some of the tracking variables are indexed ("Loop Only") variables that must be enclosed in an order loop.
  - Our Google Analytics sample demonstrates the use of tracking variables.
- Prior to the release of customizable receipts, eSellerate would add tracking code to individual receipt pages when software publishers requested it for use with solutions such as Google Analytics. We now encourage publishers to add the tracking code themselves, through customizable receipts. If you're ready to switch from one of our custom solutions to adding your own tracking code to receipt pages, please let us know. We will then remove the unneeded code, to prevent duplication or errors in your tracking data.

Preparing Custom Layouts for Receipts

If you created your layout prior to the release of customizable receipts (February 6, 2008), you can leave the receipt settings as is, and a system page will continue to provide the online receipts for that layout. However, if you want the ability to customize the online receipts, you will need to update your layout as described here.

To update layouts that do not use customizable receipts:

1. Download a receipt layout file from the eSellerate Downloads page. The link for accessing the downloads is on the Sales Manager home page, under the "What's New for eSellerate" information. (Use the "Custom Receipt Default Examples" link.)
2. Open the layout that you want to edit. The Files tab appears.
3. Click **Upload Files**. This displays a page with instructions on how to select and upload files.
4. Upload the receipt layout file that you downloaded for step 1.

5. Click the **Settings** tab to display that tab of the Custom Layout Detail page.
6. Set **Receipt Page** to the name of your receipt layout file.
7. Click **Update Settings**.
8. Inspect, test and publish the edited layout as you normally would.

Payment Methods Integration

The payment options available to customers purchasing through eSellerate include most major credit cards, PayPal, e-check (ACH), international wire and purchase orders.

Custom Layouts that you create (using the default layouts as your starting point) will provide functionality for all the payment methods that eSellerate supports. If you created your layout prior to the release of ACH, international wire and purchase orders (August 31, 2010) and you want your customers to be able to use those payment methods, you will need to update your layout.

To update layouts that do not support ACH, international wire or purchase orders:

- Follow the instructions provided in LayoutUpdates_Aug2010.pdf, which is available for downloading through this link: http://-support.esellerate.net/FileManagement/Download/9de8c14809b94bd8bb04499c5c81d0ae

See Also

"PayPal Payments" on page 376

"E-check (ACH) Payments" on page 377

"International Wire Payments" on page 378

"Purchase Order Payments" on page 380

Custom Layout Lexicon

Publishers who localize their web stores for multiple languages can use the Lexicon page to localize text strings on the layout.

Localizing Layout Content (the Lexicon)

As mentioned in the overview, text on new store layouts is localized in all supported languages. Publishers can customize most text and translations, or take them as they are, ready to go. Information on customizing these items follows.

Warning: Before you edit any of the default lexicon strings, please consider the following: Default lexicon strings will receive any updates that eSellerate pushes out for them, but overridden strings do not receive those updates. So, you can override a string or you can allow it to receive future updates, but not both.

Note: If you haven't already specified the languages that you want to use for localizing your stores, click **Select Languages**. Make your selections, and then click **Save Changes**, which will return you to the Lexicon page.

To edit text strings on the Lexicon page:

1. You can view the lexicon by name (the default view), or by language. To switch the view, click the button that is currently appearing in the bottom right corner—either **View by Language** or **View by Name**.
2. To edit any text string shown on the Lexicon page, click in its field and make your changes. You can also paste in data.

   Note: The Keywords and the Comment fields have a limit of 1,000 characters each. Strings longer than that limit will be truncated on saves.

3. At any time during your edits, you can save your work by clicking **Save Changes**.
4. If you edit a text string (other than one that you created yourself) and later want to restore it to its default value, do the following:
   1. If you're not already viewing by name, click **View by Name**.
   2. From the **Named Strings** list, select the string that you want to restore to its default.
   3. Click **Default**.

If needed, you can add a text string to the lexicon, and manage how that string displays in stores by using a string variable in the form of _String.*name*. (This approach requires adding the string variable to Custom Layouts.)

To add a text string to the lexicon:

1. Make sure the current view is by name, rather than by language.
2. Click **New**.
3. Enter a name, which must have no spaces, begin with a letter, and contain only letters, digits, or underscores. This will be the *name* for your string variable.

   Warning: We recommend that you always check for possible duplicate names before you add text strings to the lexicon. If you add a text string with a name that is already in use (regardless of case, because the names are case-insensitive), you will overwrite the existing text string instead of creating a new one.

4. Fill out the other fields as needed.

> **Note:** The Keywords and the Comment fields have a limit of 1,000 characters each. Strings longer than that limit will be truncated on saves.

> **Note:** Strings that are left blank will not show up for the corresponding language in the web store. For example, if the web store is showing Spanish, but the Spanish string for Address1 was left blank in the lexicon, then nothing will appear for Address1. (The stores don't drop back to English, or any other language, for strings that are left blank in the lexicon.)

5. Click **Save Changes**. (If the name that you entered happens to be a reserved name, you will be prompted to use a different name.)

> **Note:** We recommend that you frequently back up any text strings that you've added to the lexicon—ideally every time that you finish making significant changes. By exporting the lexicon to Excel and archiving the Excel files somewhere, you will have a way to easily restore your most recent work if data is ever lost.

To delete a text string that you have added to the lexicon:

1. Make sure the current view is by name, rather than by language.
2. From the **Named Strings** list, select the string that you want to delete.
3. Click **Delete**.

Searching for Text Strings by Keyword

When the current view is by language, you can make the page show text strings that match certain keywords.

To search for text strings by using one keyword:

1. Make sure the current view is by language, rather than by name.
2. In the **Keywords** field, enter the keyword for this search.
3. Click **match**.

To search for text strings by using multiple keywords:

1. Make sure the current view is by language, rather than by name.
2. In the **Keywords** field, enter the keywords for this search. Use a space between each keyword.
3. Do one of the following:
    - To find strings that use all of the specified keywords, click **match all**.
    - To find strings that use at least one of the specified keywords, click **match any**.

Exporting the Lexicon to Excel for Backups and External Editing

As an alternative to editing text strings one-by-one on the Lexicon page, you can export the lexicon to Excel for editing, and later import the modified Excel file. The export will include the languages that you have enabled on the Select Languages page. (Exports always include English, regardless of whether that language is enabled.)

> **Note:** Because Excel cells have a 32,767-character limit, exports will not be permitted if any elements in the lexicon are larger than 32K. In that case, you'll need to work on the lexicon through the Sales Manager interface only, without doing any exporting or importing.

To export the lexicon, click **Export Lexicon to Excel**, and then save the file.

Importing the Lexicon from Excel

Warning: Before you import from Excel, make sure that you have already backed up the lexicon in its current state by exporting to Excel. Backing up the lexicon is critical because it is possible for you to mistakenly wipe out data on imports.

When you're ready to import an edited lexicon, and you've heeded the preceding warning about backups, click **Import Lexicon from Excel**. Click **Browse** (or **Choose File** if you're using Chrome or Safari), locate an Excel file for importing, and then click **Process File**.

See Also

"Localizing eSellerate Stores" on page 382

"Information for Translators" on page 387

"Language Selection" below

"Translations" on the facing page

Language Selection

The Language Selection page is for specifying the languages that you want to use for localizing your stores. If you're not using localization, you can skip this help topic.

It is possible to arrive at the Language Selection page from the publisher level (beginning at the Lexicon page) or from the eSeller level (Web Store or Embedded). When arriving from the eSeller level, there are additional options for controlling when each selected language is available in that eSeller. Preview status makes the language available for testing, and Active status makes the language available for customers to choose when they visit the live store.

Warning: In regard to non-English languages: Do not turn on Active languages for stores that are not using localized layouts. The only time that you should set a non-English language to Active status is when the store is using a localized layout, and you have finished testing the language in your store.

An example of the Language Selection page for an eSeller follows. In this case, the languages available for translating are English, French, and Chinese Simplified. For this particular eSeller, the preview (test) store will be able to show English or French, and the live store will be able to show English only.

See Also

"Localizing eSellerate Stores" on page 382

"Custom Layout Lexicon" on page 296

"Translations" below

Translations

Translations have to do with the localization of Custom Layout variables. If you're working with localization, you can use the Translations page to localize customer-facing language that is specific to your products and web stores.

Note: If you haven't already specified the languages that you want to use for localizing your stores, you will need to go to the Select Languages page to complete that task. For more information, see "Selecting Languages for Localization" on page 383.

Localizing Publisher Content (Translations)

Localizable items are designated by a "Translate Data" icon in the Sales Manager. A few examples of these localizable items: SKU Name, Short Description (SKU setting), Store Name (eSeller setting), and Support URL (Receipt Information). Clicking **Translate Data** brings up the Translations page for the corresponding item. At that point, there are two possible ways to edit the strings:

- Edit the strings one-by-one on the Translations page in the Sales Manager, and click **Save Changes** when you're finished.
- Export all translations to Excel for editing, and later import the modified Excel file.

Note: Non-English translations that are left blank will default to English. For example, if the web store is showing Spanish, but there is no Spanish translation for Store Name, then the English translation for that item will appear. (This assumes that an English translation exists.) To intentionally blank out a translation so that nothing shows up for it in the corresponding language, you can enter non-displaying content such as .

Note: We recommend that you frequently back up your translations—ideally every time that you finish making significant changes. By exporting the translations to Excel and archiving the Excel files somewhere, you will have a way to easily restore your most recent work if data is ever lost.

Exporting Translations to Excel for Backups and External Editing

The export will include the languages that you have enabled on the Select Languages page. (Exports always include English, regardless of whether that language is enabled.)

Note: Because Excel cells have a 32,767-character limit, exports will not be permitted if any elements in your translations are larger than 32K. In that case, you'll need to work on your translations through the Sales Manager interface only, without doing any exporting or importing.

To export the translations, click **Export All Translations to Excel**, and then save the file.

Importing Translations from Excel

Warning: Before you import from Excel, make sure that you have already backed up the translations in their current state by exporting to Excel. Backing up the translations is critical because it is possible for you to mistakenly wipe out data on imports.

When you're ready to import edited translations, and you've heeded the preceding warning about backups, click **Import Translations from Excel**. Click **Browse** (or **Choose File** if you're using Chrome or Safari), locate an Excel file for importing, and then click **Process File**.

See Also

"Localizing eSellerate Stores" on page 382

"Information for Translators" on page 387

"Language Selection" on page 298

"Custom Layout Lexicon" on page 296

Affiliate Landing Pages

Landing Pages are customized web pages that members of the eSellerate Affiliates program can use to promote your individual products. Information on how to make Landing Pages available to your affiliates follows.

For information on the eSellerate Affiliates program, see "eSellerate Affiliates" on page 249.

Information on Landing Pages appears here as follows:

Prerequisites

Before you begin working with Landing Pages, you should have already done the following:

- Signed up to use the eSellerate Affiliates program
- Made at least one SKU available for affiliate sale
- Approved at least one affiliate for selling your products

These actions are prerequisites for testing Landing Pages that you create.

Tip: To see how your SKUs and Landing Pages are presented to affiliates, you can sign up for an affiliate management account at http://affiliates.esellerate.net. Having access to both types of accounts will allow you to test the affiliate process from end to end. For example, you could use the affiliate account to sign up to sell one of your own products, and then either approve or deny the request from your publisher account (assuming that you have manual approval enabled).

The Basics

Landing Pages offer affiliates a ready-made solution for providing product information and "Buy" and "Try" links. All that affiliates need to do is direct their customers to the Landing Page, where the customers can read about the product and then either purchase it or download an eST trial version (when trials are available). Because all promotion takes place on the Landing Page, there's no need for affiliates to list and update product information on their own.

You can assign up to six Landing Pages to each of the SKUs that you make available for affiliate sale. If you assign multiple Landing Pages to a SKU, your affiliates will be able to choose the ones that best fit their needs.

eSellerateprovides an EZ Landing Page that you can assign to your SKUs without having to create and customize your own Landing Pages. For a look at a sample EZ Landing Page, visit http://-publishers.esellerate.net/images/screenshot.jpg. If you would like to use the EZ Landing Page option, and you do not intend to create and customize your own Landing Pages, you can skip to "Assigning Landing Pages to SKUs" on page 303.

Notes on Landing Pages

- Landing Pages are defined as normal HTML pages, so you can use any HTML editor to design your pages.
- eSellerate provides two default pages that you will use as a starting point for your own Landing Pages.
- Looking at the default pages is the best way to understand Landing Pages functionality.
- The default pages will read in the following elements without requiring any customization on your part: the image, Short Description and "More Info" text designated for the SKU on the Basic tab of the SKU Detail page, and the URLs for the "Buy" and "Try" links. You will need to customize other elements on the pages.
- Default Landing Pages include one HTML file named default.htm. This file is required. You can add other HTML files if desired.
- The default pages will show "Try" links only if you offer an eST version of the corresponding SKU. Those links are Hosted eST links, which allow affiliates to provide trial versions of your software without having to host the downloads themselves.
- When a customer visits a Landing Page, eSellerate writes a cookie that includes the affiliate ID and any parameters passed in the query string. If the customer later purchases the product featured on that Landing Page, cookie information (if present) will be used to credit the affiliate for the sale.
- You should replace the default banner graphic (header.jpg) with one of your own. The Landing Page will use your banner if the affiliate has not uploaded one. Otherwise, if the affiliate has uploaded a banner, that banner will display in place of yours.
- For information on how to dynamically customize various elements when the Landing Page file is rendered, see "Tags & Variables" on page 308. Additional information on using variables is available at "Variables Notes" on page 309.
- Landing Pages support the use of cascading style sheets, which are grouped under CSS Files on the Files tab. You can use style sheets to control the formatting attributes of multiple HTML Landing Page files. Style sheets offer the advantage of keeping reusable code in one central location, so you can change the formatting of all files that use the style sheet by editing just one file.
- Due to the inherent simplicity of Landing Pages, the default pages do not use style sheets.
- For advanced customization of Landing Pages, you will need to use JavaScript. See the default HTML pages for examples of JavaScript usage.
- The supported image file extensions are .jpeg, .jpe, .jpg, .gif, .png and .bmp.
- Referencing external images is allowed.
- Non-HTML files that you upload to a Landing Page are automatically placed in a virtual "images" folder. Be sure to include "images/" in the path when you refer to the files in your HTML code. (Enclosing the path in double quotation marks is required.) For instance, after uploading an image file named "mylogo.gif" and a CSS file named "mystyles.css" you could refer to the files as follows:
  - <img src="images/mylogo.gif">
  - <LINK REL="stylesheet" type="text/css" href="images/mystyles.css">
- An example of how to link from one Landing Page to another follows:
  - <a href="http://get.esellerate.net/get/ALP123412345/MoreInfo.htm?affID=<external AffID>&SkuID=<external SkuID>&AT=<external AT>">More Info
- To find out which buttons on a Landing Page are used the most, you can include the publisher tracking code "PT" in each button's query string, and then track the results in eSellerate reports. For example, the following code would pass the tracking ID "buy1" when the customer clicks that particular "Buy" button:

  - <a href="http://store.eSellerate.net/a.asp?c=0_<external skuID>_<external AffID>&PT=buy1"><img src="images/buy.gif" border=0>
- When you delete a Landing Page, it still remains available to affiliates. For that reason, we recommend that you update Landing Pages rather than delete them.
- The total disk space allowed for all Landing Pages is 5 MB. Deleted files are not included in the disk space calculation. See the Landing Pages page for figures on disk space used and remaining.
- There is no limit to the number of Landing Pages that can concurrently exist in the Sales Manager (though total disk space restrictions apply).
- Each Landing Page can support an unlimited number of pages.

Creating Landing Pages

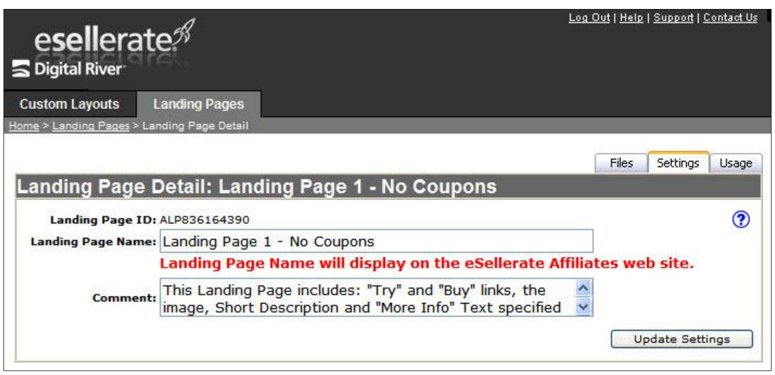
To create a Landing Page:

1. From the Landing Pages page, click **New**. The Default Landing Page Select page appears.
2. Select a default page to use as a starting point for your new Landing Page.
3. Click **Create**.
4. Follow the instructions provided at the Landing Pages Settings and Files tabs to complete your Landing Page. See "Settings Tab" below and "Files Tab" on next page.

Assigning Landing Pages to SKUs

You will assign Landing Pages at the Available SKU Detail level. See "Submitting SKUs" on page 252.

Settings Tab



You can use the Settings tab of the Landing Page Detail page to enter **Landing Page Name** and **Comment**, as described here.

Note: When you're finished making changes to the Settings tab, be sure to click **Update Settings**.

Entering a Landing Page Name

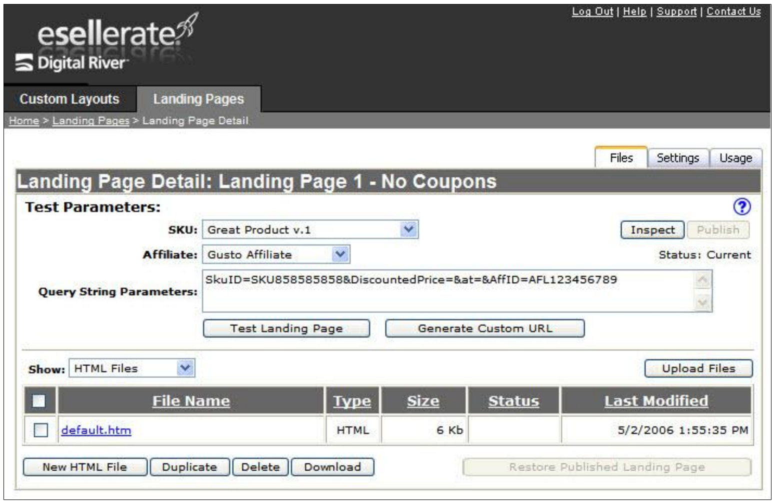
Landing Page Name will be visible to your affiliates if you assign this Landing Page to SKUs that you list on the eSellerate Affiliates web site. For that reason, you should always enter names that are suitable for public display.

Note: Duplicate Landing Page names are allowed. However, there is no built-in way to differentiate between duplicate names when you assign Landing Pages to your SKUs.

Entering a Comment

If desired, you can edit the default comment. Text that you enter here is for your reference only, and will not be visible to your affiliates.

Files Tab



You can use the Files tab of the Landing Page Detail page to do any of the following:

- List Landing Page files by type
- Edit Landing Page files within the Sales Manager
- Download Landing Page files for offline editing
- Upload completed Landing Page files
- Discard changes made since the last publish date
- Inspect the Landing Page for errors
- Test the Landing Page using any SKU/affiliate/query string combination as the parameters
- Publish the Landing Page for affiliate use
- Generate custom URLs for Landing Pages that you release to limited groups

More details on the functions provided by the Files tab follow.

Listing Landing Page files by Type

All Landing Page files are accessible from the Files tab. Use the **Show** list to list Landing Page files by type, such as HTML files or image files, or to list all files. (Selecting **All Files** will not list deleted files, which must be listed separately.)

A Landing Page file's status will indicate whether it has been created, modified, renamed or deleted since the last publish date. Otherwise, if the file is current, no status will be shown.

Note: Renamed status does not necessarily indicate that only the file name has changed. A file with Renamed status has been renamed, and possibly modified, since the last publish date.

To select Landing Page files for actions such as delete and duplicate, do one of the following:

- To select individual files, select the check box to the left of the file.
- To select all files listed, select the check box in the table heading.

Editing Landing Page Files Within the Sales Manager

You can duplicate or delete Landing Page files. After deleting a file, you have the option to undelete it at any time before you publish the modified Landing Page. To undelete a file, click the **Show** list and select **Deleted Files**. Select the check box to the left of the desired file and then click **Undelete**.

To add a blank HTML file to the Landing Page, click **New HTML File**. If you need to add another type of Landing Page file, you will need to create the file offline and upload it.

HTML and CSS files allow direct editing within the Sales Manager. To edit one of these Landing Page files, click its **File Name** field to display the Text File Editor page. From that page, you can do any of the following:

- Rename the file
    - Duplicate Landing Page file names are not allowed.
    - Though a Landing Page can use multiple HTML files, the file that provides the main functionality must be named default.htm. For that reason, you cannot rename the default.htm file that is included with default Landing Pages.
    - The maximum file name length is 255 characters.
- Type or paste in code changes
- Render the HTML code in a new browser window
    - The rendered HTML will show formatting, but it will not read in live data for eSellerate elements such as images and internal variable values.
    - This option is available on Internet Explorer only. Other browsers do not show a button for rendering the HTML code.
- Revert changes made to the file since the last publish date
- Use the Tags & Variables link to find information on how to dynamically customize various elements when the Landing Page file is rendered
- Save or discard your changes

See also "Tags & Variables" on page 308 and "Variables Notes" on page 309.

Downloading Landing Page Files

To download Landing Page files to a Zip archive file (.zip) for offline editing, do the following:

1. Use the **Show** list to display the desired Landing Page files.
2. Select the files that you want to download.
3. Click **Download**.

Uploading Landing Page Files

After working on files offline, you can upload them to your Landing Page.

Points to note before you upload files:

- The maximum number of files that you can upload at one time is 100 when using Internet Explorer for Windows and eight for other configurations.
- Uploading an existing file will replace it.
- The maximum file size allowed for uploads is 64 KB for HTML and CSS files and 1 MB for all other files.
- Duplicate Landing Page file names are not allowed.
- The maximum file name length is 255 characters.

- eSellerate supports uploading HTML files that have either .htm or .html file extensions. Both will be shown as type HTML within the Landing Page.

To upload files, click **Upload Files** and follow the instructions provided.

Discarding Changes Made to the Landing Page

If you need to discard changes that you've made to the Landing Page, you can do so for individual files or for the entire Landing Page, as follows:

- To revert changes made to an individual Landing Page file since the last publish date, click the file's **File Name** field, which will bring up the Text File Editor. Then click **Revert Content**. Also note:
    - Reverting will only revert content. If a file has been renamed since the last publish date, the file name will be unchanged.
    - If a file is the only one in the Landing Page that has been modified since the last publish date, reverting the file will change the Landing Page's status back to current.
    - Revert is file name based. If there's not a published file for the file name selected, it can't be reverted.
    - The revert function will only be enabled if the file has been published.
- To restore all changes made since the last publish date, click **Restore Published Landing Page**. This will restore the Files and Settings tabs to the configuration of the published Landing Page. Also note:
    - If a file has been deleted since the last publish date, it will be restored.
    - If a file has been renamed since the last publish date, the restored file will use the original file name.
    - Landing Page Name and Comment on the Settings tab will not be restored.

Inspecting the Landing Page

If you have made changes to a Landing Page since the last publish date (in which case the status will be Modified), you must inspect the Landing Page before you can publish it. Inspection checks for two conditions:

- The HTML file(s) within the Landing Page must use valid internal variables. Inspection checks basic usage such as: <internal Sku123456780.short_description>. It does not check internal variables used in conjunction with external variables, such as: <internal Sku123456780.short_description>.
- The Landing Page must include an HTML file named default.htm. Because of this requirement, all default Landing Pages include an HTML file named default.htm, and you cannot delete or rename the file within the Sales Manager.

Errors will be reported on the Inspection Results page. You will need to correct the errors before the Landing Page can pass inspection and you can publish it.

See also "Tags & Variables" on page 308.

Testing the Landing Page

The Files tab provides an interface for testing the Landing Page using any SKU/affiliate/query string combination as the parameters.

Notes

- Affiliates have the option of providing a banner for use on their Landing Pages. This test will show affiliate banners when applicable.
- In contrast to eSeller testing methods such as the Preview URL for web stores, this test uses the edited version of the Landing Page, rather than the published version.

- This test is designed for verifying that everything appears on the Landing Page as expected. It is not designed for placing test orders. If you need to test the order functionality, a better choice is do so through Web Store or Embedded Web Store eSellers, which allow the use of preview certificates.

To test the Landing Page, do the following:

1. Make a selection from the **SKU** list.
2. Make a selection from the **Affiliate** list.
3. The **Query String Parameters** text field will display all external variables found in the Landing Page. Some of these variables will be prefilled with values. Enter a value for any variable that doesn't include one by default, with the exception of AT. You should leave the value for AT blank.
4. Click **Test Landing Page**. This will open a new browser window.

Publishing the Landing Page

A Landing Page can have one of three statuses:

- Current, which indicates the Landing Page has not been edited since the last publish date
- Modified, which indicates the Landing Page has been modified since the last publish date, but has not yet passed inspection
- Pending, which indicates the Landing Page has been modified since the last publish date and has passed inspection, but has not yet been published

Publishing a Landing Page replaces the previous Landing Page and makes the new one available to your affiliates. Before you click Publish, be sure to test the Landing Page using the SKUs and query string parameters that your affiliates will be using.

Notes

- If affiliates are using this Landing Page, and you have modified the query string parameters so that existing URLs to this page will become invalid, you will need to take the following steps in addition to publishing:
  - For each SKU that uses this Landing Page (as listed above), go to the Available SKU Detail level, update the query string parameters and then save your changes. Next, follow the instructions provided to send notification to your affiliates.
  - If applicable to this Landing Page, regenerate custom URLs and send them to your affiliates.

Generating Custom URLs

You can use the Generate Custom URL feature to release Landing Pages to limited groups. See "Generating Custom URLs" below.

Generating Custom URLs

You can use the Generate Custom URL feature to release Landing Pages to limited groups.

> **Note:** You do not need to generate custom URLs for Landing Pages that you make available to all affiliates.

To generate a custom URL:

1. Make any needed changes to the Landing Page files, such as customizing elements within default.htm and replacing the default banner graphic (header.jpg) with one of your own.

2. In the Test Parameters section of the Files tab, do the following:
    1. Select the SKU that this Landing Page will offer.
    2. Select the name of the affiliate that will use this Landing Page.
    3. The Query String Parameters text field will display all external variables found in the Landing Page. Some of these variables will be prefilled with values. Enter a value for any variable that doesn't include one by default, with the exception of AT. You should leave the value for AT blank.
3. Click **Test Landing Page** and verify that everything appears as expected.
4. When you're finished testing the Landing Page, return to the Files tab and click **Generate Custom URL**. A window displays a custom URL.
5. Copy the URL and provide it to your affiliate.

Tags & Variables

Information on tags and variables appears as follows:

- "Variables" below
- "Tags" on the facing page

Variables

Landing Pages support using variables to dynamically customize various elements when the page is rendered, such as SKU name and price and the URLs used for "Buy" and "Try" links. There are two types of variables that you can use to read or set values within your Landing Pages: internal variables and external variables.

Internal Variables

Internal variables represent values that are read from eSellerate's servers when the Landing Page is rendered. The following internal variables are available for use in Landing Pages:

Variable	Description	Example Usage
Skuxxxx.name	Name of the referenced SKU	Sku123456780.name
Skuxxxx.product_image_url	URL of the image for the referenced SKU	Sku123456780.product_image_url
Skuxxxx.short_description	Short Description for the referenced SKU	Sku123456780.short_description
Skuxxxx.long_description	"More Info" Text for the referenced SKU	Sku123456780.long_description
Skuxxxx.price	Price of the referenced SKU	Sku123456780.price
Skuxxxx.estdownloadurl	URL for downloading the eST version of the referenced SKU	Sku123456780.estdownloadurl

Internal Variables

Internal variables are case-insensitive.

Caution: Because internal variables are read only, you should not set them within your Landing Pages, or pass them in the URL query string as you would for external variables.

External Variables

External variables represent values that are read from the URL query string when the Landing Page is rendered. These variables can be virtually anything that you choose to pass in the query string and handle in your Landing Page code. The one notable exception is that a few variable names are reserved for eSellerate external variables. You can freely use eSellerate external variables in your Landing Pages, but you should not use the reserved names for your own custom external variables.

The reserved eSellerate external variables and their descriptions are:

Variable	Description	Example Usage
SkuID	SKU ID as listed on the Basic tab of the SKU Detail page	SkuID=SKU123456780
AffID	Affiliate ID as listed on the Affiliate Detail page	AffID=AFL987654320
ALP	Affiliate Landing Page ID as listed on the Settings tab of the Landing Page Detail page	ALP=998877665
Coupon	Coupon ID as listed on the Coupon Details page	Coupon=10PERCENT
PT	Publisher Tracking ID, which can be any alphanumeric name the publisher chooses, up to a 100-character limit	PT=2006campaign
AT	Affiliate Tracking ID, which can be any alphanumeric name the affiliate chooses, up to a 100-character limit	AT=41X57Q

Reserved External Variables

External variables are case-insensitive.

Tags

When you reference variables in your HTML code, you should use tags to specify whether the variables are internal or external, as shown in the following examples:

Summary	Example
Use an internal variable to show a value. For this example, the value of Sku123456789.price is read from eSellerate's servers when the page is rendered.	<internal Sku123456780.price>
Use an external variable to show a value. For this example, the value of DiscountPrice is read from the URL query string when the page is rendered.	<external DiscountPrice>
Use a combination of internal and external variables to show a value. For this example, the value of SkuID is read from the URL query string, and that value determines which SKU price is read from eSellerate's servers.	<internal <external SkuID>.price>

Tags

Variables Notes

As an alternative to hard coding everything that requires customization in your Landing Pages code, you can use variables to make the pages work for virtually any SKU/affiliate/query string combination.

Finding Information on Landing Page Variables

The primary resources for variables information are as follows:

- The Tags & Variables help page
    - To view this help, use the link displayed on the Text File Editor page when you edit individual HTML Landing Page files. (The content of that page is also available at "Tags & Variables" on page 308.)
- HTML files in the default Landing Pages
    - The HTML file included with every default Landing Page provides working examples of variables usage.

Notes on Using Landing Page Variables

- External variables used in the default HTML file (default.htm) allow you to pass values through the URL query string. In most cases, you will pass those values by entering them into the **Query String Parameters** field when you assign Landing Pages to SKUs on the Available SKU Detail page. The values will then be included in the query string when affiliates use that Landing Page.
- The default Landing Page "Landing Page 1 - With Coupons" allows you to pass information about coupon discounts through the query string. However, this Landing Page does not prefill the coupon ID into the shopping cart when the customer clicks the "Buy" link. If you would like to prefill the coupon ID, add it to the end of the query string as "&coupon=" followed by the ID that customers would otherwise have to enter themselves. You might also want to modify the text that instructs customers to manually enter the ID, or "code."

Chapter 12 - User Management

The User Management section of the eSellerate Sales Manager is for working with the following features:

- "Users & Permissions" on next page
- "My Profile" on page 316

Users & Permissions

The permissions manager allows multiple users with varying levels of permissions to manage the same account.

Notes on the Permissions Manager

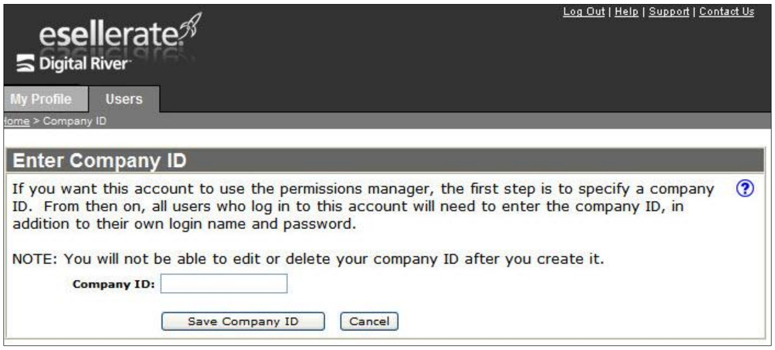
- Permissions can be granted for any of the main functional areas shown on the eSellerate Sales Manager home page.
- Permissions allow the user to access all the primary functions of an area. For example, a user with permissions for the "Sales Reports" area can access all of the sales reports.
- Areas that the logged-in user cannot access appear dimmed.
- If the user tries to navigate to an area that requires additional permissions, the page will display the following message: "You do not have access to this area of the eSellerate Sales Manager. If you think you should have access to this area, please ask one of the following people to change your permissions." The listing below this message will include the names and e-mail addresses of users who have user management permissions for the account.
- Once an account is set up to use the permissions manager, there are two primary roles for the users:
  - Account administrator — There is one administrator for each account. The administrator has access to all areas of the Sales Manager, and therefore can manage the permissions of all other users.
  - Authorized users — This group includes all users other than the administrator who have their own login credentials for accessing the account. Each authorized user has a set level of permissions, which can range from no permissions to full access like the administrator.
- The permissions manager does not include the administrator in the list of users, because the administrator's permissions cannot be modified.
- Users with user management permissions can manage their own permissions, and those of all other users except the administrator. Other options available to these users include adding and deleting user accounts, resetting passwords and changing login credentials.

Getting Started

To set up an account to use the permissions manager, the administrator will need to do the following:

1. Go to the User Management section on the home page of the eSellerate Sales Manager and click **About Users & Permissions**. (This link will change after you specify a company ID.) The page that appears will provide information on the benefits of this option. When you finish reading the information, click **Continue**. You will then be able to continue with step 2.
2. Create a company ID. See "Login Company ID" on the facing page.
3. Add authorized users. See "User List" on the facing page.
4. Set each users' login credentials and permissions. See "User Detail" on page 314.

Login Company ID



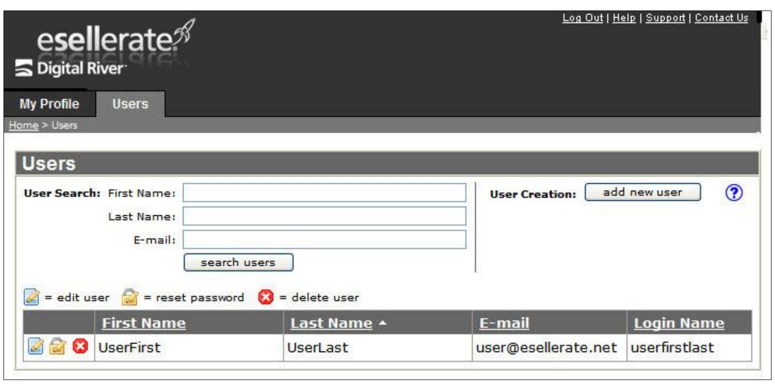
If you want this account to use the permissions manager, the first step is to specify a company ID. From then on, all users who log in to this account will need to enter the company ID, in addition to their own login name and password.

Caution: You will not be able to edit or delete your company ID after you create it.

To enable this account to use the permissions manager, enter an ID of up to 50 characters, and then click **Save Company ID**. The Users page appears. See "User List" below.

If you do not want this account to use the permissions manager, click **Cancel**. You will then be able to continue logging in as usual, without having to enter a company ID.

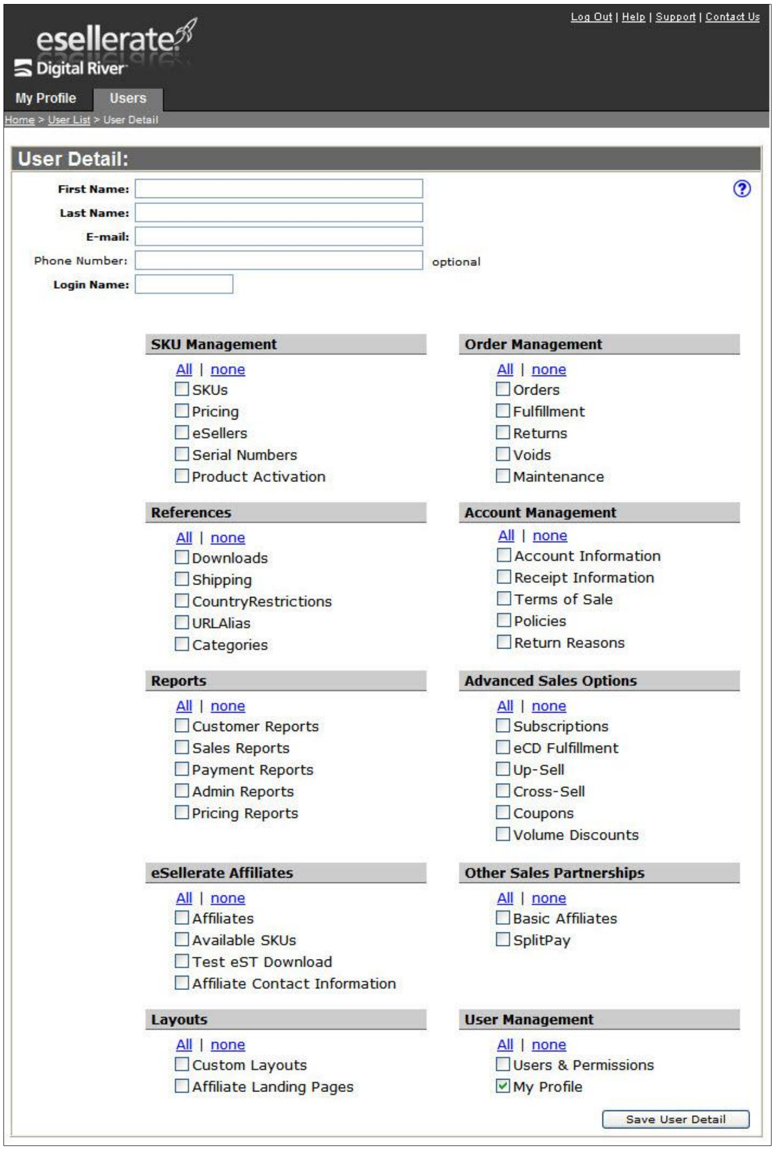
User List



You can use the Users page to do any of the following:

- Add user accounts — Go to the User Creation section and click **add new user**. Then follow the instructions provided at "User Detail" on next page.
- Search for user accounts — Enter your search criteria in the User Search section. Then click **search users**.
- Edit user accounts — In the user list, click the "edit user" icon to the left of the user's first name. Then follow the instructions provided at "User Detail" on next page.
- Reset user passwords — In the user list, click the "reset password" icon to the left of the user's first name. Then follow the instructions provided at "Reset Password" on page 315.
- Delete user accounts — In the user list, click the "delete user" icon to the left of the user's first name. When a confirmation dialog appears, click **OK**.

User Detail



The User Detail page is for specifying contact information, login name and permissions for the selected user.

In the upper portion of the page, you can specify the user's contact information and user name, but not a password. eSellerate generates a password when you save the user details for the first time. (The users can change their assigned passwords later, if they have the required permissions.)

You can grant permissions for any of the main functional areas shown in the lower portion of the page. All permissions are disabled by default for a new account, with the exception of My Profile. Leaving that permission enabled allows users to manage their own profile information, so they don't have to rely on you or other users to change their passwords or set up their password hints and answers.

Select the check boxes next to the permissions to enable them. You can also click **All** or **none** to select or clear entire sections of permissions at once.

If you are setting up a new account, please note that eSellerate will send the user an e-mail notification as soon as you click **Save User Detail**. That notification will use the address from your profile as the "From" address, and will include all the credentials the user needs to log in to the account. It will also include a login link that goes directly to the My Profile page, where the user can change the assigned password if desired, and enter a password hint and answer.

eSellerate sends the e-mail notification the first time you save the user details, but not for future edits. (The option for resetting passwords involves a different e-mail notification.)

Note: Setting certain values on the User Detail page sets the same values on the My Profile page for the selected user, and vise versa. These values are First Name, Last Name, E-mail, Phone Number and Login Name. See also "My Profile" on next page.

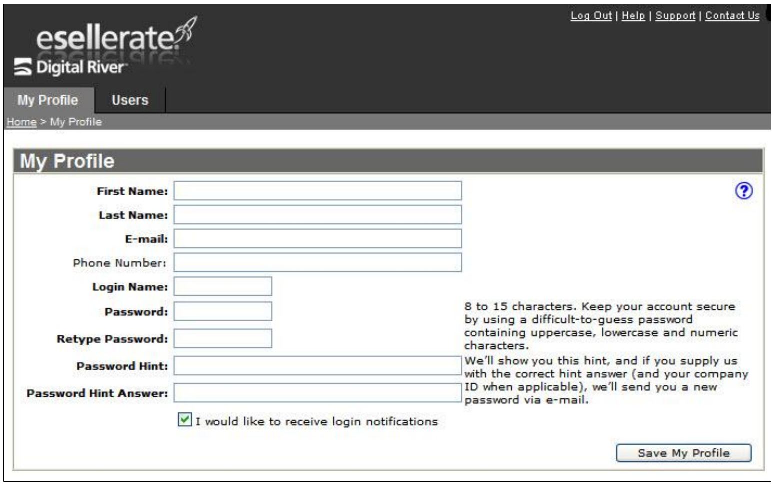
Reset Password

You can use this feature to reset the passwords of other authorized users.

Note: To change your own password, you can use the My Profile page (if you have permissions for that area). See also "My Profile" on next page.

To reset the password of the selected user, click **Reset Password**. eSellerate will then generate a random password and send it to the user via e-mail. This e-mail message will use the address from your profile as the "From" address, and will state that you have reset the password. It will also include a login link that goes directly to the My Profile page, where the user can change the assigned password if desired.

My Profile



Your profile identifies you as an account user. For example, if this account uses the permissions manager and you reset another user's password, eSellerate will send the user an e-mail notification that uses the address from your profile as the "From" address, and states that you have reset the password.

The login name and password that you specify here will be required when you log in to your account.

Your password hint and answer will allow you to reset your password if you forget it. Help with forgotten login names and passwords is available on the login page (https://publishers.esellerate.net).

If you select the check box for login notifications, eSellerate will send you an e-mail notification for each login that uses your credentials.

Chapter 13 - Embedded Web Store eSellers

With Embedded Web Store eSellers, you can add integrated purchase and update capabilities to your application, and control virtually every aspect of the store interface through the use of Custom Layouts.

When you turn your application into an Embedded Web Store eSeller, your customers can:

- Purchase the retail version of your product directly from a demo version.
- Use your retail software to check for newer versions, and upgrade directly from the application when a newer version becomes available. These new versions can be free or purchased upgrades.

Embedded Web Store eSellers can help you deliver the latest versions of your software at the latest price. Your customers always have instant access to your new releases.

Information on Embedded Web Store eSellers appears here as follows:

Development Options

Embedded Web Store eSellers call on the eSellerate Embedded Web Store Engine—a shared library located on the customer's computer system—to perform various functions. How you interface your application with the engine depends on your development environment. The options are:

- **Library for Macintosh applications.** This option allows you to compile the interface code directly into your Macintosh application. Just include the necessary header and library files in your project. Development tools that work with this option are Xcode and other tools that can produce Cocoa and Carbon applications.

  Note: This is a Universal (universal binary) solution that runs natively on both PowerPC- and Intel-based Macintosh computers.

  See "eWeb Libraries for Macintosh" in Chapter 1 of the eSellerate SDK Reference.

- **Library for Windows applications.** This option allows you to compile the interface code directly into your Windows application. Just include the necessary header and library files in your Visual C++ project.

  See "eWeb Libraries for Windows" in Chapter 1 of the eSellerate SDK Reference.

- **REALBasic plug-in for Macintosh and Windows applications**. This option allows you to compile the interface code directly into Macintosh and Windows applications that you develop with REALbasic. Just drop the plug-in into REALbasic's Plugins folder to make it available in your REALbasic project.

  Note: For Macintosh applications – This is a Universal (universal binary) solution that runs natively on both PowerPC- and Intel-based Macintosh computers.

  See "eWeb Plug-in for REALbasic" in Chapter 1 of the eSellerate SDK Reference.

- **ActiveX control for Windows applications.** This option allows you to maintain the interface code as a shareable component separate from your COM-compatible Windows application. Just register the control and reference it in your project. Typical development tools include Visual Basic, CodeWarrior, Borland Delphi and Borland C++Builder.

  See "eWeb ActiveX Control" in Chapter 1 of the eSellerate SDK Reference.

Overview

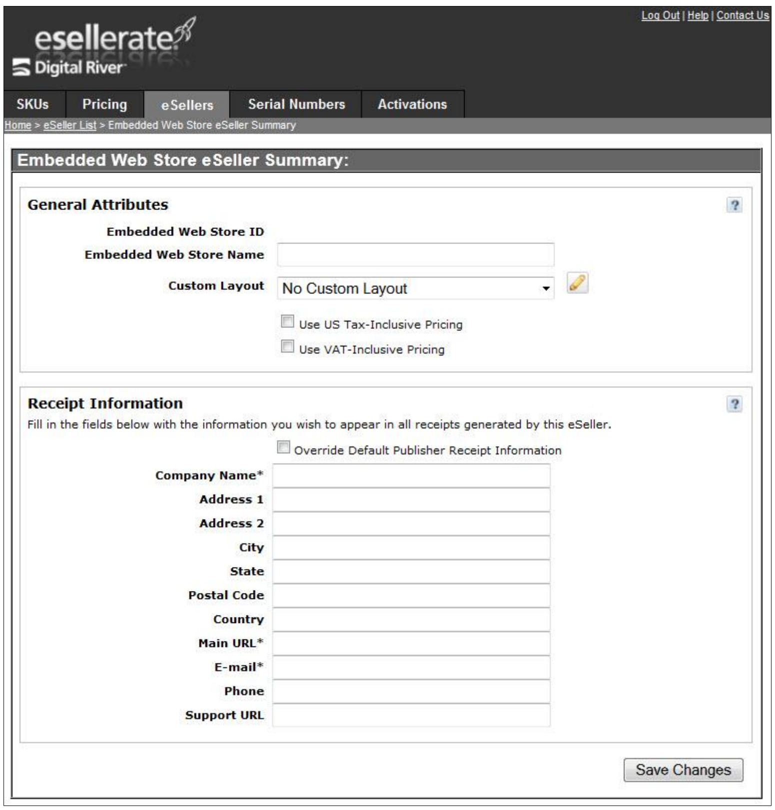
The basic steps for creating an Embedded Web Store eSeller are:

1. Create an Embedded Web Store eSeller in the eSellerate Sales Manager. See "Creating an Embedded Web Store eSeller" on next page.
2. Configure your application's source code to reference the Embedded Web Store eSeller. See "Configuring Your Application's Source Code to Reference the eSeller" on page 330.
3. Compile your application.

Creating an Embedded Web Store eSeller

To create an Embedded Web Store eSeller:

1. Go to http://www.esellerate.net and log in. The home page appears.
2. Under SKU Management, click **eSellers**. The eSeller List page appears.
3. To the right of Create New, click **Embedded Web Store**. (An Embedded Web Store can also be created by selecting a current Web Store from your eSeller List and clicking **Duplicate as Embedded Web Store**.) The Embedded Web Store eSeller Detail page appears.



4. In the General Attributes section of the page, enter a store name, select a layout and optionally enable pricing and fulfillment features, as described at "Embedded Web Store: General Attributes" below.
5. Complete the Receipt Information section, as described at "Embedded Web Store: Receipt Information" on the facing page.
6. Click **Save Changes**.

Embedded Web Store: General Attributes

The General Attributes section of the Embedded Web Store eSeller Detail page includes the options described here.

- **Embedded Web Store ID** – The ID is not editable. You will need the ID to reference this eSeller for SDK functions. For more information, see:
  - "Embedded Web Store eSellers" on page 317
  - Chapter 1 of the eSellerate SDK Reference

- **Embedded Web Store Name** – Enter a name for this Embedded Web Store. The store name appears in the footer of all default Custom Layouts.
- **Custom Layout** – Select a layout from the **Custom Layout** list. If you need to edit or create a layout before making this selection, you can click the **Edit Custom Layouts** icon to do so, and then return to the Embedded Web Store eSeller Detail page.
- **Languages** – After you save a new Embedded Web Store eSeller for the first time, a Languages option will be available.

  By default, this store will display content in English only. If you plan to localize this store for other languages, you can specify those languages by clicking **Edit Language Selection**, and then following the instructions provided.

- **Use US Tax-Inclusive Pricing** – By default, the pricing in this store will exclude US tax, so that customers pay the unit prices plus any applicable US tax. Another option is to use US tax-inclusive pricing, which ensures your customers pay the exact prices shown on your store's catalog pages, with no additional costs when taxes apply. (In the shopping cart, US tax will be subtracted from the original prices, and the total tax amount will be displayed as a separate line item.) To include US tax in the pricing for this store, select the **Use US Tax-Inclusive Pricing** check box. For more information, see "Tax-Inclusive Pricing" on page 374.

  Caution: If you switch to tax-inclusive pricing, your net earnings will be reduced unless you increase the prices of all items in this store to make up for the tax amounts. To make those adjustments, we recommend using Native Currency Pricing, which will allow you to set pricing for SKUs, eCD and other items in your customers' preferred currencies. See "Setting Up Pricing" on page 67.

- **Use VAT-Inclusive Pricing** – By default, the pricing in this store will exclude Value Added Tax (VAT), so that customers pay the unit prices plus any applicable VAT. Another option is to use VAT-inclusive pricing, which ensures your customers pay the exact prices shown on your store's catalog pages, with no additional costs when VAT applies. (Text in the shopping cart will indicate when the grand total includes VAT.) To include VAT in the pricing for this store, select the **Use VAT-Inclusive Pricing** check box. For more information, see "Tax-Inclusive Pricing" on page 374.

  Caution: If you switch to tax-inclusive pricing, your net earnings will be reduced unless you increase the prices of all items in this store to make up for the tax amounts. To make those adjustments, we recommend using Native Currency Pricing, which will allow you to set pricing for SKUs, eCD and other items in your customers' preferred currencies. See "Setting Up Pricing" on page 67.

- **Enable Amazon Fulfillment** – If your account is set up to integrate with Amazon Fulfillment, an **Enable Amazon Fulfillment** check box will be available. Selecting this check box will set up this store to use Amazon Fulfillment for all order items that require shipping. See also "Integrating with Amazon Fulfillment" on page 154.

Embedded Web Store: Receipt Information

The Receipt Information section of the Embedded Web Store eSeller Detail page includes the options described here.

If you would like this eSeller to use different receipt information than the defaults set at the Receipt Information page, follow the instructions below. Otherwise, you can skip this step (and leave the Receipt Information section for this eSeller blank).

To use the override option, select the **Override Default Publisher Receipt Information** check box and then enter your receipt information. Required fields are marked with an asterisk.

Information you enter here will be used in the following places:

- Receipts created at the conclusion of a purchase (see also "Receipt Page Notes" on page 293)
- Order Confirmation, Order Fulfillment and Return Notification e-mail sent to the customer
- eSellerate Order Notice e-mail sent to the addresses specified for the per-transaction report (available through Account Information)
- Packing slips
- CD labels used in eCD fulfillment
- Order information accessed by customers through eSellerate Credit Card Charges Information (http://www.eslr8.com) and eSellerate After-Purchase Services (http://store.eselllerate.net/support)

Note: With the exception of the eSellerate Order Notice e-mail, per-eSeller receipt information affects customer communications only. All other e-mail that you receive from eSellerate will use the defaults set at the Receipt Information page when applicable.

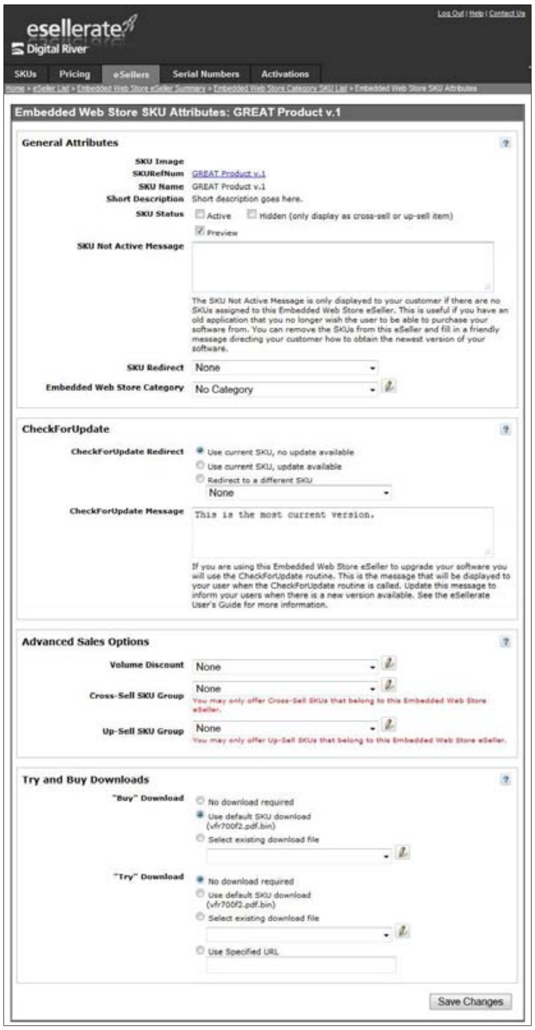
Note: There are some settings on the Receipt Information page that you cannot affect by overriding default receipt information. These settings are the introductory text and product support text for Order Confirmation and Order Fulfillment e-mail, as set in the Customized Order E-mail section.

Adding Embedded Web Store SKUs

Next, you'll add SKUs to sell in your Embedded Web Store.

To add Web Store SKUs:

1. In the Embedded Web Store SKU Categories area, click **Add SKU**. This will display all your SKUs, separated by the current Rows per Page value, which is 5 by default.
2. Click through the SKU pages to find your SKU, or use the SKU Search feature.
3. Select the radio button for the SKU that you want to add to your eSeller.
4. Click **Add Selected SKU**. The Embedded Web Store SKU Attributes page appears.



5. Complete the Attributes page settings as described at:
   - "Embedded Web Store SKUs: General Attributes" on next page
   - "Embedded Web Store SKUs: CheckForUpdate" on next page
   - "Embedded Web Store SKUs: Advanced Sales Options" on page 325
   - "Embedded Web Store SKUs: Try and Buy Downloads" on page 326
6. Click **Save Changes.**

7. Repeat this process to add as many SKUs as desired.
8. When you're finished, click **Return to eSeller**.

Embedded Web Store SKUs: General Attributes

Information on how to set up the General Attributes section follows.

- **SKU Image, SKURefNum, SKU Name, Short Description** – This information identifies the SKU currently open for editing. With the exception of SKURefNum, which is not editable, you can set these attributes on the Basic tab of the SKU Detail page.
- **SKU Status** – Here you can set this SKU's status (Active, Preview, both or neither). A SKU with Active status will be available through your active Embedded Web Store. Use Preview status to make the SKU available for testing in your preview Embedded Web Store.

  The **Hidden (only display as cross-sell or up-sell item)** option applies if you are cross-selling or up-selling this SKU within your Embedded Web Store. Select the check box for this option if you want to offer the SKU only when your customers select other SKUs for their purchases. Otherwise, the SKU will display as any combination of the following:

  - A regular catalog item
  - A cross-sell item
  - An up-sell item
- **SKU Not Active Message** – The purpose of the SKU Not Active Message is to provide useful information to customers who attempt to purchase a SKU that you no longer offer.

  If you no longer want the current SKU to be available for purchase from your application, you can remove the SKU's Active status and enter a descriptive message in the **SKU Not Active Message** field. After you make those changes, when a customer uses your application to initiate a purchase of the current SKU, the text you specified for the SKU Not Active Message will display.
- **SKU Redirect** – The SKU Redirect feature allows you to bypass the current Embedded Web Store SKU when you want to make a different SKU available for purchase. When a customer uses your application to initiate a purchase of the current SKU, the SKU you specified in the **SKU Redirect** list will be made available instead.

  Tip: For a look at all the SKU Redirects set up for your Embedded Web Store eSellers, use the SKU Redirects report, which is available in Admin Reports.
- **Embedded Web Store Category** – The Embedded Web Store Category list is for organizing the display of SKUs in your Embedded Web Store. These categories will display in alphabetical order by default, or you can set the display order from the Embedded Web Store eSeller Summary page.

  Note: Embedded Web Store SKUs that use no category will always appear last in your Embedded Web Store.

  Click the **Embedded Web Store Category** list to select a category, or click the **Edit Categories** icon to edit or create one. Otherwise, select **No Category** to skip this option.

Embedded Web Store SKUs: CheckForUpdate

Information on how to set up the CheckForUpdate section follows.

CheckForUpdate Redirect

The CheckForUpdate Redirect feature allows an application to use the same SKU RefNum for purchasing and checking for updates. This is useful because only one Embedded Web Store SKU is required for initial setup. When you're ready to release an update, you can create a second SKU for that purpose, and redirect to it from the original SKU.

Tip: For an example of how to handle updates throughout several product releases, see "Product Update Example" on page 332.

The following settings apply only to the Embedded Web Store SKU that your application references in the CheckForUpdate function call. CheckForUpdate Redirect settings are ignored for all other Embedded Web Store SKUs.

To set the CheckForUpdate Redirect:

- In the CheckForUpdate Redirect dialog box, click a radio button to select one of the following options:

Option	Description
Use current SKU, no update available	This is the appropriate setting for the first time you release your application as an Embedded Web Store eSeller, and any other time that no update is available. When a customer uses your application to check for a newer version, the CheckForUpdate Message specified for this SKU will display. After reading your message, the customer will need to close the Embedded Web Store window, which will return control to your application.
Use current SKU, update available	Use this setting if an update is available, and this SKU will provide the update. When a customer uses your application to check for a newer version, the CheckForUpdate Message specified for this SKU will display. After reading your message, the customer will have the option to receive the newer version, which could be a free upgrade or a purchased upgrade.
Redirect to different SKU	Use this setting if an update is available, and a different SKU will provide the update. Make your SKU selection from the list provided. When a customer uses your application to check for a newer version, the CheckForUpdate Message specified for this SKU will display. After reading your message, the customer will have the option to receive the newer version, which could be a free upgrade or a purchased upgrade.

CheckForUpdate Redirect Options

Notes:

- The preceding instructions describe the check for update behavior of the default Custom Layouts for Embedded Web Store eSellers.
- If you use this feature in conjunction with the SKU Redirect, the check for update behavior changes as follows:
  - For "Use current SKU, no update available," the behavior is unchanged.
  - For "Use current SKU, update is available," the SKU specified by the SKU Redirect will be made available, and the CheckForUpdate Message specified for the current SKU will display.
  - For "Redirect to different SKU," the behavior is unchanged.
- For a look at all the CheckForUpdate Redirects set up for your Embedded Web Store eSellers, use the Embedded Web Store CheckForUpdate Redirects report, which is available in Admin Reports.

CheckForUpdate Message

Complete the **CheckForUpdate Message** field, if applicable to this Embedded Web Store eSeller. (See "CheckForUpdate Redirect" on previous page for details.) This message will display when a customer uses your application to check for a newer version.

Embedded Web Store SKUs: Advanced Sales Options

Information on how to set up the Advanced Sales Options section follows.

- **Volume Discount** – The Volume Discount list is for assigning a volume discount set to this SKU. If you use this option, your Embedded Web Store customers will be able to click a link to view this SKU's volume discount information.

  Note: For a SKU to support volume discounts, it must have Allow Multi-Quantity Sales enabled. That option is available on the Advanced tab of the SKU Detail page.

  Click the **Volume Discount** list to select a volume discount, or click the **Edit Volume Discounts** icon to edit or create one. Otherwise, select **None** to skip this option.

- **Cross-Sell SKU Group** – When an Embedded Web Store customer adds this SKU to the shopping cart, you can offer other SKUs for sale in conjunction with the purchase. To set up this cross-selling relationship, you would assign a cross-sell SKU group to this SKU.

  Note: You can only offer cross-sell SKUs that belong to this Embedded Web Store eSeller.

  Click the **Cross-Sell SKU Group** list to select a group, or click the **Edit Cross-Sell SKU Groups** icon to edit or create one. Otherwise, select **None** to skip this option.

- **Up-Sell SKU Group** – When an Embedded Web Store customer chooses to purchase this SKU, you can offer one or more higher priced alternatives. To set up this up-selling relationship, you would assign an up-sell SKU group to this SKU.

  Note: You can only offer up-sell SKUs that belong to this Embedded Web Store eSeller.

  Click the **Up-Sell SKU Group** list to select a group, or click the **Edit Up-Sell SKU Groups** icon to edit or create one. Otherwise, select **None** to skip this option.

Embedded Web Store SKUs: Try and Buy Downloads

Information on how to set up the Try and Buy Downloads section follows.

- **"Buy" Download** – In the "Buy" Download area, you can specify the file to download when customers purchase this Embedded Web Store SKU. Your choices are as follows:
  - Use no download.
  - Use the default SKU download. (This is the default setting.)
  - Use an existing download file other than the default SKU download.

  The download file that you specify for this SKU will override the default SKU download, if the two files are different. This behavior enables a SKU to have an individual download for each eSeller that uses it.

  Tip: To delete a download file, use the Downloads editor (available in the References section of the eSellerate Sales Manager).

- **"Try" Download** – In the "Try" Download area, you can specify the file to download when your customers click the Try button for the product. Your choices are as follows:
  - Use no download.
  - Use the default SKU download. (This is the default setting.)
  - Use an existing download file other than the default SKU download.
  - Use a direct link to a download file outside of the eSellerate system. In this case, eSellerate will not track bandwidth usage for the download because it resides on an external site.

  The download file that you specify for this SKU will override the default SKU download, if the two files are different. This behavior enables a SKU to have an individual download for each eSeller that uses it.

Note: To delete a download file, use the Downloads editor (available in the References section of the eSellerate Sales Manager).

Setting Display Order for Categories and SKUs

After you add SKUs to your Embedded Web Store eSeller, you can organize the SKUs by category, and control their display order in the Embedded Web Store. These settings are available in the Embedded Web Store SKU Categories section of the Embedded Web Store eSeller Summary page.

Setting Category Display Order

By default, the SKUs you add to this Embedded Web Store eSeller will display in alphabetical order according to category. To change the ordering for a specific category, enter a number (0-999) in its **Display Order** field and then click **Update Display Order**.

Categories with the same Display Order value will display in alphabetical order.

SKUs that use no category will appear under No Category on this page, and will always display last in the Embedded Web Store.

Setting SKU Display Order

By default, SKUs will display in alphabetical order within categories. To change the SKU ordering within a category, click the category name. The Web Store Category SKU List page will display. To change the ordering for a specific SKU, enter a number (0-999) in its **Display Order** field and then click **Update Status**.

SKUs with the same Display Order value will display in alphabetical order.

Tip: The increments you use for SKU display order should reserve enough space for future SKU entries to fit in when needed. For example, the Display Order values for SKUA, SKUB and SKUC could be 25, 50 and 75, respectively.

Generating a Preview Certificate

The preview certificate (a number generated when you created your Embedded Web Store eSeller in the Sales Manager) allows you to test your application before shipping it. When you perform a purchase or check for update from your application and use the proper preview certificate number, the only information returned would be for preview SKUs assigned to this eSeller. Furthermore, payment processing would execute in demo mode only, so no charges would occur. When you are ready to ship this application, just clear the preview certificate number, either from your source code or from the Sales Manager. The next time you perform a purchase or check for update, the information returned will be for active SKUs assigned to this eSeller, and the customers' payment methods will be billed.

When you are finished testing your application and ready to ship, remember to clear out the preview certificate number from either your source code (this requires you to rebuild your application) or from the Sales Manager. Also, make sure that the SKUs assigned to your Embedded Web Store eSeller are correctly set to Active status.

Configuring Your Application's Source Code to Reference the eSeller

Once you create an Embedded Web Store eSeller, you can use the information to integrate eSellerate functionality into your application.

To configure your application's source code to reference the eSeller:

1. You will need several pieces of information from the Sales Manager, so you may want to leave your browser open to it. The following list summarizes information that you may need to integrate eSellerate into your application.

Item	Sales Manager Page
Based On setting (optional, used to validate Standard and Standard Enhanced serial numbers)	Home > Serial Number Set List > Serial Number Set Detail
Publisher Key value (optional, used to validate Standard and Standard Enhanced serial numbers)	Home > Serial Number Set List > Serial Number Set Detail
Embedded Web Store ID value	Home > eSeller Lists > Embedded Web Store eSeller Summary
eSeller Status setting (optional)	Home > eSeller Lists > Embedded Web Store eSeller Summary
Preview Certificate value	Home > eSeller Lists > Embedded Web Store eSeller Summary

Sales Manager Information for Embedded Web Store eSellers

2. Download and install the eSellerate Embedded Web Store SDK files. The SDK is available for downloading through the eSellerate Downloads page. The link for accessing the downloads is on the Sales Manager home page, under the "What's New for eSellerate" information. If you already have the SDK, we still recommend that you check our web site for the latest version.
3. Add and link the eSellerate components into your application's source code.
4. Decide how you are going to implement access to the eSellerate Embedded Web Store Engine within your application, according to the interface provided for your environment. You have almost unlimited flexibility in how you can implement a purchase or upgrade of your product. If you haven't already done so, please look carefully at the source code provided with the eSellerate demo applications, and the extensive comments. No documentation can describe this process better than looking at actual source code. This will also provide you some ideas of how to implement eSellerate in your own application.

   The following is an overview of the actions you can perform from your application.

   - Invoking the Embedded Web Store
     - Purchase an application. You will almost always perform this action from a demo version of your application. It is intended for the customer's "first time" purchase of the software. Typically, you will charge the customer the full retail price for your software. After the purchase, eSellerate will generally return a new serial number and optionally deliver a new file download of your retail software. You can choose to update the demo application "in place" using the new serial number to enable full functionality, or

you can just replace the demo application with a retail version.

    - Check for an update to the application. This action allows customers that have already purchased your software to check for new versions and upgrade directly from inside the application. These new versions of your software can be free upgrades or purchased upgrades. Once the user decides to upgrade, eSellerate will typically download a new version of the software. This download can be a new installer or an updater.
- Accessing Information Returned by the Embedded Web Store
    - Receive serial numbers and shopping cart information. A successful purchase or check for update will return any serial numbers and shopping cart information that applies. You can use this information to automate delivery of the products purchased. For example, you could use the new serial numbers to automatically register and enable features for each product the customer purchased.
- Validating a Serial Number
    - You can use your application to check the validity of a Standard or Standard Enhanced serial number.

> **Note:** The preview certificate (a number generated when you created your Embedded Web Store eSeller in the Sales Manager) allows you to test your application before shipping it. When you perform a purchase or check for update from your application and use the proper preview certificate number, the only information returned would be for preview SKUs assigned to this eSeller. Furthermore, payment processing would execute in demo mode only, so no charges would occur. When you are ready to ship this application, just clear the preview certificate number, either from your source code or from the Sales Manager. The next time you perform a purchase or check for update, the information returned will be for active SKUs assigned to this eSeller, and the customers' payment methods will be billed.

5. Build your application and try it out.

> **Note:** When you are finished testing your application and ready to ship, remember to clear out the preview certificate number from either your source code (this requires you to rebuild your application) or from the Sales Manager. Also, make sure that the SKUs assigned to your Embedded Web Store eSeller are correctly set to Active status.

> **Note:** The eSellerate Embedded Web Store SDK provides API calls that you can use to install the eSellerate Embedded Web Store Engine automatically. (An example of these calls is **eWeb_InstallEngineFromPath**.) If you use some other method to install the engine, we recommend that you use version checking to prevent replacing an existing engine with an older version. The engine automatically checks our servers and self-updates when necessary. However, when you replace an existing engine with an older version, your users will experience longer downloads while the engine updates itself.

Product Update Example

This example demonstrates how you can use the following features to handle updates throughout several product releases:

- SKU Redirect
- CheckForUpdate Redirect

For information on how to set these features, see "Adding Embedded Web Store SKUs" on page 323.

Releasing Version 1

When first released, software version 1 has no updates available, so no redirect is needed. Instead, you would set up one Embedded Web Store SKU (SKU1) to handle both purchase and check for update duties, as shown here:

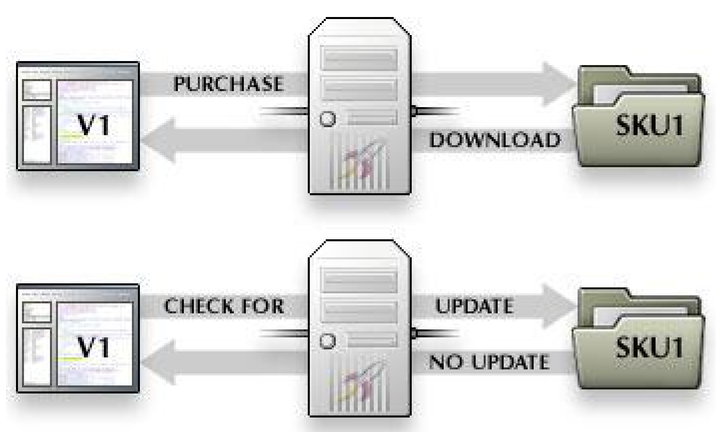
SKU Name: SKU 1 **SKU Status:** Active **SKU Not Active Message:** Not applicable **SKU Redirect:** None **CheckForUpdate Redirect:** Use current SKU, no update available **CheckForUpdate Message:** This is the most current version.	Not applicable

Example Settings for Software Version 1

Next, you would set up your Embedded Web Store eSeller application to reference SKU1 in Purchase and CheckForUpdate function calls.

With the eSeller and SKU set up as described above, the behavior of software version 1 would be as follows:

- A customer who initiated a purchase using demo software version 1 would be able to purchase retail software version 1.
- A customer who checked for updates using retail software version 1 would see this message: "This is the most current version."



Purchase and Check for Update Behaviors for Software Version 1

Releasing Version 2

To release software version 2, you would need to do the following:

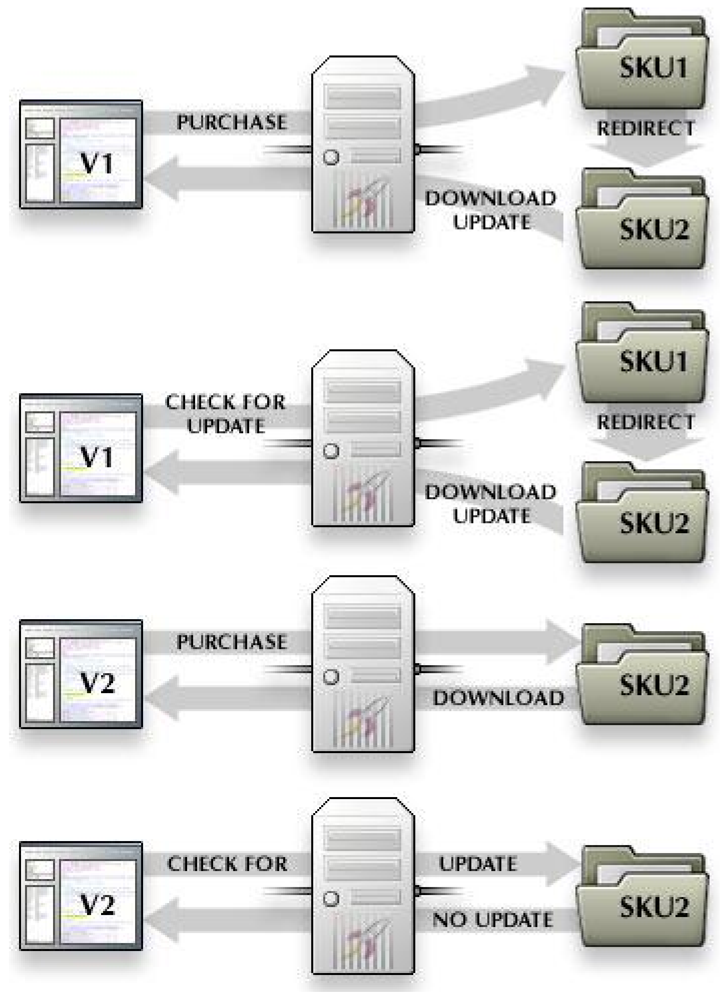
1. Create a SKU (SKU2) for updating to version 2 using the settings shown.
2. Set up a SKU Redirect from SKU1 to SKU2.
3. Set up a CheckForUpdateRedirect from SKU1 to SKU2.
4. Update the CheckForUpdate Message for SKU1.
5. Update your Embedded Web Store eSeller application to reference SKU2 in Purchase and CheckForUpdate function calls and make the new demo software available to your customers.

SKU Name: SKU1 **SKU Status:** Active **SKU Not Active Message:** Not applicable **SKU Redirect:** SKU2 **CheckForUpdate Redirect**: SKU2 **CheckForUpdate Message**: An update is available. If you would like to purchase the update, click the "update now" button to proceed.	**SKU Name:** SKU2 **SKU Status:** Active **SKU Not Active Message:** Not applicable **SKU Redirect:** None **CheckForUpdate Redirect**: Use current eSeller, no update is available **CheckForUpdate Message**: This is the most current version.

Example Settings for Software Version 2

After you made these changes, all existing versions of your product would help customers purchase or upgrade to version 2, as summarized below:

- A customer who initiated a purchase using demo software version 1 would be able to purchase retail software version 2.
- A customer who checked for updates using retail software version 1 would see this message: "An update is available. If you would like to purchase the update, click the 'update now' button to proceed." The customer would then be able to obtain retail software version 2.
- A customer who initiated a purchase using demo software version 2 would be able to purchase retail software version 2.
- A customer who checked for updates using retail software version 2 would see this message: "This is the most current version."



Purchase and Check for Update Behaviors for Software Version 2

Releasing Version 3

To release software version 3, you would need to do the following:

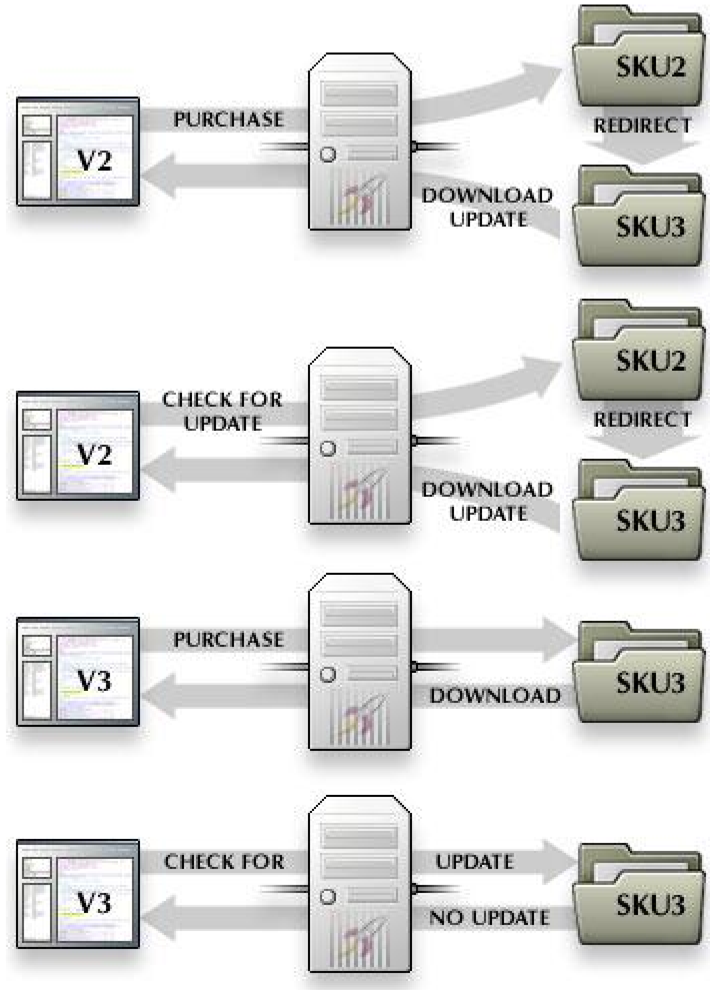
1. Create a SKU (SKU3) for updating to version 3 using the settings shown.
2. Uncheck the Active status for SKU1.
3. Update the SKU Not Active Message for SKU1.
4. Update the SKU Redirect for SKU1.
5. Update the CheckForUpdate Redirect for SKU1.
6. Update the CheckForUpdate Message for SKU1.
7. Set up a SKU Redirect from SKU2 to SKU3.
8. Set up a CheckForUpdateRedirect from SKU2 to SKU3.
9. Update your Embedded Web Store eSeller application to reference SKU3 in Purchase and Check-ForUpdate function calls and make the new demo software available to your customers.

SKU Name: SKU1 **SKU Status:** Not Active **SKU Not Active Message:** A newer version is available. Please download it from our web site and purchase from that version. **SKU Redirect:** NoneCheckForUpdate Redirect: Use current SKU, no update available **CheckForUpdate Message:** An update for this version of the software is no longer available. If you would like to purchase the latest version, please download it from our web site, and purchase from that version.	**SKU Name:** SKU2 **SKU Status:** Active **SKU Not Active Message:** Not applicable **SKURedirect:** SKU3 **CheckForUpdate Redirect:** SKU3 **CheckForUpdate Message:** An update is available. If you would like to purchase the update, click the "update now" button to proceed.
SKU Name: SKU3 **SKU Status:** Active **SKU Not Active Message:** Not applicable **SKU Redirect:** None **CheckForUpdate Redirect:** Use current eSeller, no update available **CheckForUpdate Message:** This is the most current version.	Not applicable

Example Settings for Software Version 3

After you made these changes, all existing versions of your product would help customers purchase or upgrade to version 3, as summarized below:

- A customer who initiated a purchase using demo software version 1 would see this message: "A newer version is available. Please download it from our web site and purchase from that version."
- A customer who checked for updates using retail software version 1 would see this message: "An update for this version of the software is no longer available. If you would like to purchase the latest version, please download it from our web site, and purchase from that version."
- A customer who initiated a purchase using demo software version 2 would be able to purchase retail software version 3.
- A customer who checked for updates using retail software version 2 would see this message: "An update is available. If you would like to purchase the update, click the 'update now' button to proceed." The customer would then be able to obtain retail software version 3.
- A customer who initiated a purchase using demo software version 3 would be able to purchase retail software version 3.
- A customer who checked for updates using retail software version 3 would see this message: "This is the most current version."



Purchase and Check for Update Behaviors for Software Version 3

Chapter 14 - Integrated eSellers

Note: The eSellerate (Integrated) SDK is a legacy option that was superseded by the Embedded Web Store SDK. It is not recommended for use with new projects. The Embedded Web Store SDK provides many advanced features that are not available with the legacy option, including fully customizable stores and universal binary support for Macs.

One of the most powerful ways to sell with eSellerate is to integrate it directly into your software application. When you turn your application into an Integrated eSeller, your customers can:

- Purchase the retail version of your product directly from a demo version.
- Use your retail software to check for newer versions, and upgrade directly from the application when a newer version becomes available. These new versions can be free or purchased upgrades.

Integrated eSellers can help you deliver the latest versions of your software at the latest price. Your customers always have instant access to your new releases.

Information on Integrated eSellers appears here as follows:

Development Options

Note: The eSellerate (Integrated) SDK is a legacy option that was superseded by the Embedded Web Store SDK. It is not recommended for use with new projects. The Embedded Web Store SDK provides many advanced features that are not available with the legacy option, including fully customizable stores and universal binary support for Macs.

Integrated eSellers call on the eSellerate Engine—a shared library located on the customer's computer system—to perform various functions. How you interface your application with the eSellerate Engine depends on your development environment. The options are:

- **Library for Macintosh applications.** This option allows you to compile the interface code directly into your Macintosh application. Just include the necessary header and library files in your, typically, CodeWarrior project.

  Note: This is not a Universal (universal binary) solution.

  See "eSellerate Libraries for Macintosh" in Chapter 2 of the eSellerate SDK Reference.

- **Library for Windows applications.** This option allows you to compile the interface code directly into your Windows application. Just include the necessary header and library files in your Visual C++ project.

  See "eSellerate Libraries for Windows" in Chapter 2 of the eSellerate SDK Reference.

- **REALbasic plug-in for Macintosh and Windows applications.** This option allows you to compile the interface code directly into Macintosh and Windows applications that you develop with REALbasic. Just drop the plug-in into REALbasic's Plugins folder to make it available in your REALbasic project.

  Note: For Macintosh applications – This is not a Universal (universal binary) solution.

  See "eSellerate Plug-in for REALbasic" in Chapter 2 of the eSellerate SDK Reference.

- **ActiveX control for Windows applications.** This option allows you to maintain the interface code as a shareable component separate from your COM-compatible Windows application. Just register the control and reference it in your project. Typical development tools include Visual Basic, CodeWarrior, Borland Delphi and Borland C++Builder.

  See "eSellerate ActiveX Control" in Chapter 2 of the eSellerate SDK Reference.

Overview

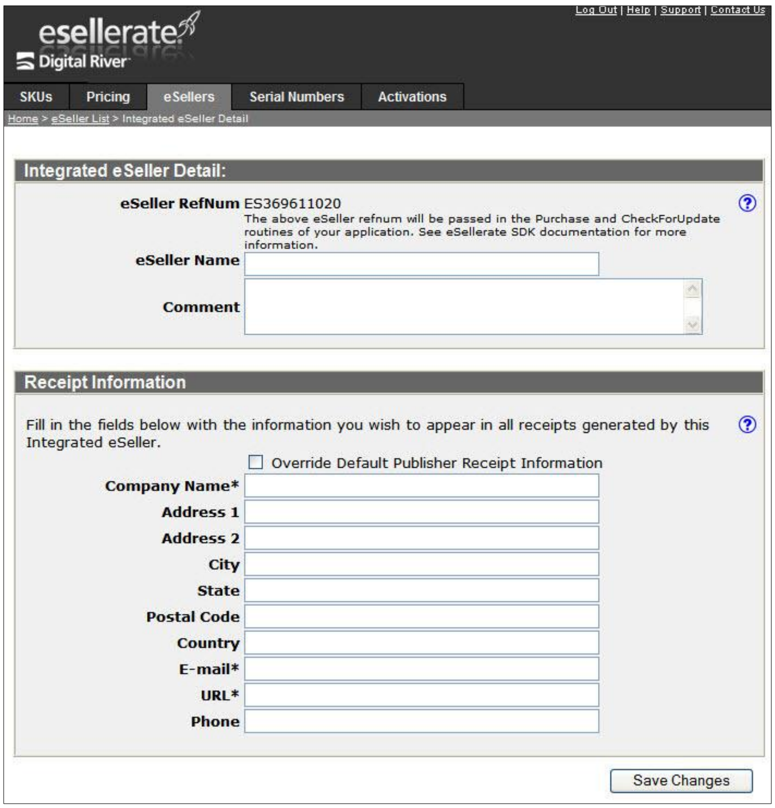
The basic steps for creating an Integrated eSeller are:

1. Create an Integrated eSeller in the eSellerate Sales Manager. See "Creating an Integrated eSeller" on next page.
2. Configure your application's source code to reference the eSeller. See "Configuring Your Application's Source Code to Reference the eSeller" on page 349.
3. Compile your application.

Creating an Integrated eSeller

To create an Integrated eSeller:

1. Go to http://www.esellerate.net and log in. The home page appears.
2. Under SKU Management, click **eSellers**. The eSeller List page appears.
3. To the right of Create New, click **Integrated**. The Integrated eSeller Detail page appears.



4. In the Integrated eSeller Detail section, enter a name for this eSeller, and any comments. This information is for internal identification only, and will not be visible to your customers.
5. If you would like this eSeller to use different receipt information than the defaults set at the Receipt Information page, follow the instructions below. Otherwise, you can skip this step (and leave the Receipt Information section for this eSeller blank).

   To use this option, select the **Override Default Publisher Receipt Information** check box and then enter your receipt information. Required fields are marked with an asterisk.

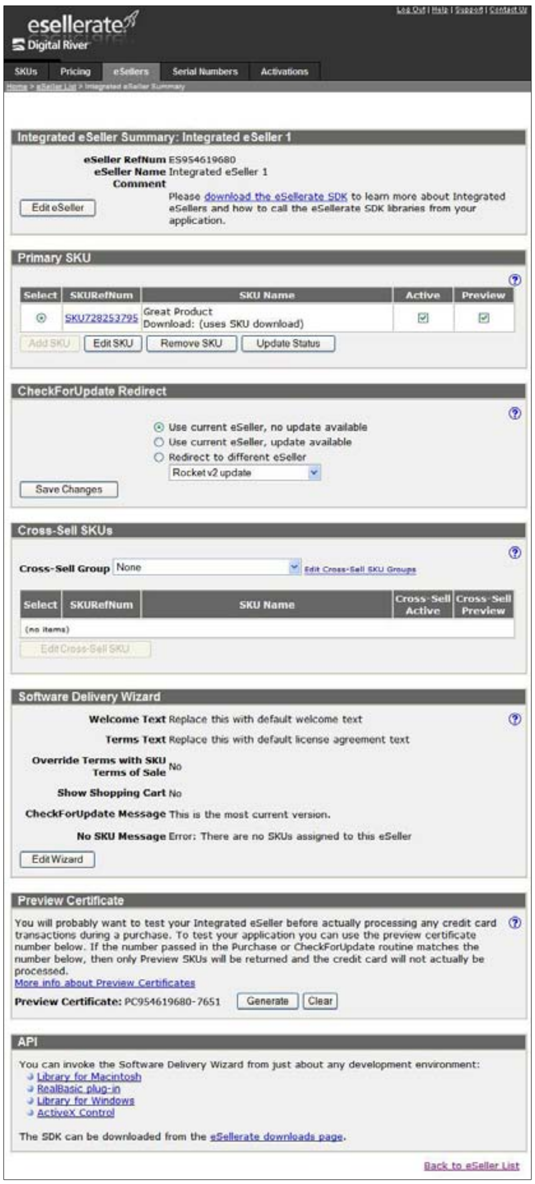
   Information you enter here will be used in the following places:

   - Receipts created by all eSellers at the conclusion of a purchase
   - Order Confirmation, Order Fulfillment and Return Notification e-mail sent to the customer
   - eSellerate Order Notice e-mail sent to the addresses specified for the per-transaction report (available through Account Information)
   - CD labels used in eCD fulfillment
   - Order information accessed by customers through eSellerate Credit Card Charges Information (http://www.eslr8.com) and eSellerate After-Purchase Services (http://store.esellerate.net/support)

Note: With the exception of the eSellerate Order Notice e-mail, per-eSeller receipt information affects customer communications only. All other e-mail that you receive from eSellerate will use the defaults set at the Receipt Information page when applicable.

Note: There are some settings on the Receipt Information page that you cannot affect by over-riding default receipt information. These settings are the introductory text and product support text for Order Confirmation and Order Fulfillment e-mail, as set in the Customized Order E-mail section.

6. Click **Save Changes**. The Integrated eSeller Summary page appears.

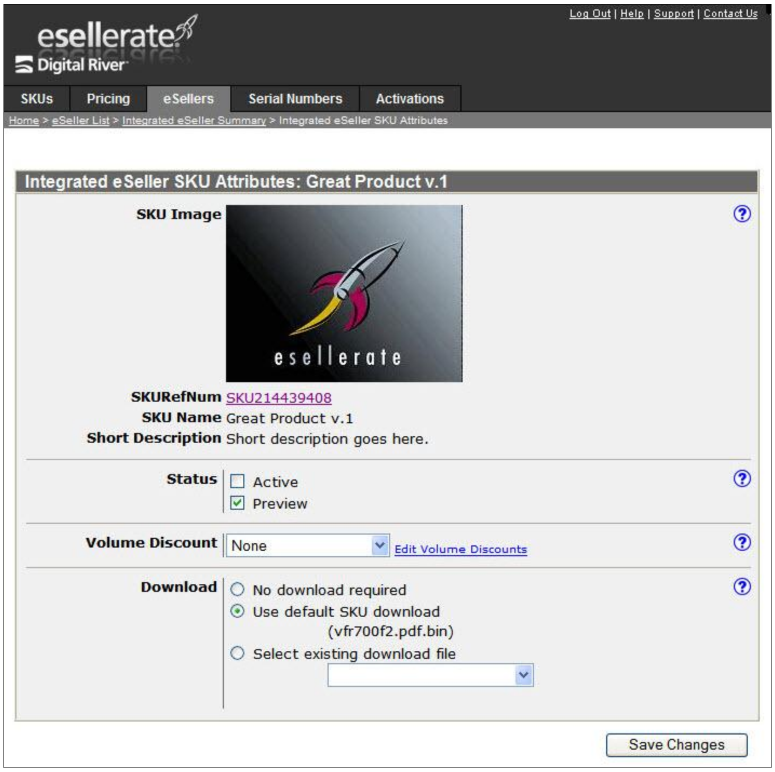


Adding a Primary SKU to the eSeller

The primary SKU should be the main SKU that the Integrated eSeller offers. This SKU may be the only one available, or the eSeller might offer other SKUs for sale in conjunction with the primary SKU purchase.

To add a primary SKU to the eSeller:

1. In the Primary SKU section, click **Add SKU**. This will display all your SKUs, separated by the current Rows per Page value, which is 5 by default.
2. Click through the SKU pages to find your SKU, or use the SKU Search feature.
3. Click a radio button to select a primary SKU to add to this Integrated eSeller.
4. Click **Add Selected SKU**. The Integrated eSeller SKU Attributes page appears.



5. Complete the Attributes page settings as described at:
   - "Integrated eSeller SKUs: SKU Attributes" below
   - "Integrated eSeller SKUs: SKU Status" on the facing page
   - "Integrated eSeller SKUs: Volume Discount" on the facing page
   - "Integrated eSeller SKUs: Download" on the facing page
6. Click **Save Changes**.

Integrated eSeller SKUs: SKU Attributes

The information in the top section of the Integrated eSeller SKU Attributes page identifies the SKU currently open for editing. With the exception of SKURefNum, which is not editable, you can set these attributes on the Basic tab of the SKU Detail page.

Integrated eSeller SKUs: SKU Status

In the SKU Status section of the Integrated eSeller SKU Attributes page, you can set this SKU's status (Active, Preview, both or neither). A SKU with Active status will be available through your active Integrated eSeller. Use Preview status to make the SKU available for testing in your preview Integrated eSeller.

Integrated eSeller SKUs: Volume Discount

The Volume Discount list is for assigning a volume discount set to this SKU. If you use this option, your customers will be able to click a link to view this SKU's volume discount information.

Note: For a SKU to support volume discounts, it must have Allow Multi-Quantity Sales enabled. That option is available on the Advanced tab of the SKU Detail page.

Click the **Volume Discount** list to select a volume discount, or click **Edit Volume Discounts** to edit or create one. Otherwise, select **None** to skip this option.

Integrated eSeller SKUs: Download

In the Download section of the Integrated eSeller SKU Attributes page, you can specify the default file to download during the delivery of this SKU. Your choices are as follows:

- Use no download.
- Use the default SKU download. (This is the default setting.)
- Use an existing download file other than the default SKU download.

The download file that you specify for this SKU will override the default SKU download, if the two files are different. This behavior enables a SKU to have an individual download for each eSeller that uses it.

Note: Integrated eSellers running on the Macintosh platform call on the eSellerate Engine for Macintosh to download and deliver files. That engine automatically decodes MacBinary files that it downloads from the eSellerate servers and saves to disk. For file formats other than MacBinary, the engine downloads and saves the files to disk without decoding or uncompressing them.

Tip: To delete a download file, use the Downloads editor (available in the References section of the eSellerate Sales Manager).

Integrated eSeller: CheckForUpdate Redirect

The CheckForUpdate Redirect feature allows an application to use the same eSeller RefNum for purchasing and checking for updates. This is useful because only one Integrated eSeller is required for initial setup. When you're ready to release an update, you can create a second Integrated eSeller for that purpose, and redirect to it from the original eSeller.

Tip: For an example of how to handle updates throughout several product releases, see "Check-ForUpdate Redirect Example" on page 351.)

To set the CheckForUpdate Redirect:

1. In the CheckForUpdate Redirect dialog box, click a radio button to select one of the following options:

Option	Description
Use current eSeller, no update available	This is the appropriate setting for the first time you release your application as an Integrated eSeller, and any other time that no update is available. When a customer uses your software to check for a newer version, the CheckForUpdate Message specified for this eSeller will display. (See "Integrated eSeller: Software Delivery Wizard" on page 346.) After reading your message, the customer will need to click OK, which will return control to your application.
Use current eSeller, update available	Use this setting if an update is available, and this Integrated eSeller will provide the update. When a customer uses your application to check for a newer version, the Check-ForUpdate Message specified for this eSeller will display. (See "Integrated eSeller: Software Delivery Wizard" on page 346.) After reading your message, the customer will have the option to receive the newer version, which could be a free upgrade or a purchased upgrade.
Redirect to different eSeller	Use this setting if an update is available, and a different Integrated eSeller will provide the update. Make your eSeller selection from the list provided.

CheckForUpdate Redirect Options

2. Click **Save Changes**.

Tip: For a look at all the CheckForUpdate Redirects set up for your Integrated eSellers, use the Integrated eSeller CheckForUpdate Redirects report, which is available in Admin Reports.

Integrated eSeller: Cross-Sell SKUs

When a customer uses this Integrated eSeller to get your primary SKU, you can offer other SKUs for sale in conjunction with the purchase. To set up this cross-selling relationship, you would assign a cross-sell SKU group to this SKU.

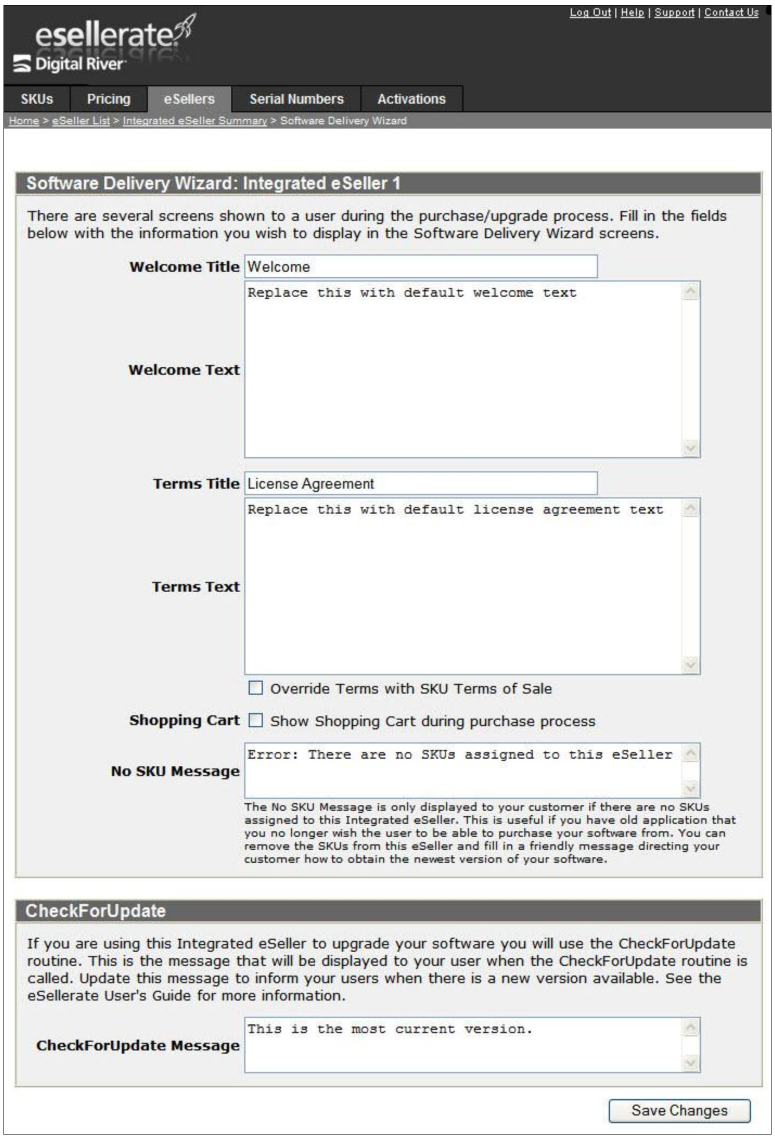
Click the **Cross-Sell SKU Group** list to select a group, or click **Edit Cross-Sell SKU Groups** to edit or create one. Otherwise, select **None** to skip this option.

Integrated eSeller: Software Delivery Wizard

During a software purchase, the eSellerate system displays several screens to your customers. You can enter titles and text for two of those screens using the Software Delivery Wizard dialog box. (Both screens are optional.)

To enter Software Delivery Wizard text:

1. Click **Edit Wizard**. The Software Delivery Wizard page appears.



2. In **Welcome Title** and **Welcome Text,** enter a welcome, product descriptions or any other marketing message. This dynamic text comes "live" from the eSellerate servers each time a customer uses your Integrated eSeller.
3. Use **Terms Title** and **Terms Text** to enter any applicable terms, such as your license agreement. The customer will be required to check a box in agreement with these terms (or terms of the override option described below) before proceeding. Because this information resides on the eSellerate servers, you can easily update it at any time.

4. Rather than display Terms Title/Terms Text content, you can display the terms of sale assigned to the primary SKU. Select the **Override Terms with SKU Terms of Sale** check box to enable this feature.
5. If desired, select the **Show Shopping Cart during purchase process** check box. This feature provides the customer with a summary of the items selected and the subtotal.
6. In the **No SKU Message** field, you can enter a message to help your customers when there are no SKUs assigned to this Integrated eSeller. This allows you to dynamically disable the eSeller and tell your customers how to obtain the product.
7. Complete the **CheckForUpdate Message** field, if applicable to this Integrated eSeller. (See "Integrated eSeller: CheckForUpdate Redirect" on page 344 for details.)This message will display when a customer uses your application to check for a newer version.

   Note: To disable the display of any of the forenamed screens or messages, delete all text from the appropriate text field and click **Save Changes**. (This will not affect the display of primary SKU terms of sale if you chose the override option.)

8. Click **Save Changes.**

Integrated eSeller: Preview Certificate

The preview certificate allows you to test your Integrated eSeller's full functionality. Customer registration and file downloads will be fully functional, while credit card processing will execute in demo mode only, so that no charges will occur.

Configuring Your Application's Source Code to Reference the eSeller

Once you create an Integrated eSeller, you can use the information to integrate eSellerate functionality into your application.

To configure your application's source code to reference the eSeller:

1. You will need several pieces of information from the Sales Manager, so you may want to leave your browser open to it. The following list summarizes information that you may need to integrate eSellerate into your application.

Item	Sales Manager Page
Publisher ID value	Home
Based On setting (optional, used to validate Standard and Standard Enhanced serial numbers)	Home > Serial Number Set List > Serial Number Set Detail
Publisher Key value (optional, used to validate Standard and Standard Enhanced serial numbers)	Home > Serial Number Set List > Serial Number Set Detail
Integrated eSeller RefNum value	Home > eSeller Lists > Integrated eSeller Summary
eSeller Status setting (optional)	Home > eSeller Lists > Integrated eSeller Summary
Preview Certificate value	Home > eSeller Lists > Integrated eSeller Summary

Sales Manager Information for Integrated eSellers

2. Download and install the eSellerate (Integrated) SDK files. Because it is a legacy option that was superceded by the Embedded Web Store SDK, the eSellerate SDK is no longer available on the eSellerate Downloads page. You can request it by contacting our support team.
3. Add and link the eSellerate components into your application's source code.
4. Decide how you are going to implement access to the eSellerate Engine within your application, according to the interface provided for your environment. You have almost unlimited flexibility in how you can implement a purchase or upgrade of your product. If you haven't already done so, please look carefully at the source code provided with the eSellerate demo applications, and the extensive comments. No documentation can describe this process better than looking at actual source code. This will also provide you some ideas of how to implement eSellerate in your own application.

   The following is an overview of the actions you can perform from your application.

   - Invoking the eSellerate Software Delivery Wizard
     - Purchase an application. You will almost always perform this action from a demo version of your application. It is intended for the customer's "first time" purchase of the software. Typically, you will charge the customer the full retail price for your software. After the purchase, eSellerate will generally return a new serial number and optionally deliver a new file download of your retail software. You can choose to update the

demo application "in place" using the new serial number to enable full functionality, or you can just replace the demo application with a retail version.

    - Check for an update to the application. This action allows customers that have already purchased your software to check for new versions and upgrade directly from inside the application. These new versions of your software can be free upgrades or purchased upgrades. Once the user decides to upgrade, eSellerate will typically download a new version of the software. This download can be a new installer or an updater.

- Accessing Information Returned by the Software Delivery Wizard
    - Receive serial numbers, download locations and shopping cart information. A successful purchase or check for update will return any serial numbers, file download locations and shopping cart information that applies. You can use this information to automate delivery of the new product. For example, you could use the new serial number to automatically register the customer's application and enable features. With the download information, you could automatically launch one of the downloaded files directly from the application. Finally, you could use the shopping cart information to manage any cross-sell items the customer purchased.
- Validating a Serial Number
    - You can use your application to check the validity of a Standard or Standard Enhanced serial number.

Note: The preview certificate (a number generated when you created your Integrated eSeller in the Sales Manager) allows you to test your application before shipping it. When you perform a purchase or check for update from your application and use the proper preview certificate number, the only information returned would be for preview SKUs assigned to this eSeller. Furthermore, credit card processing would execute in demo mode only, so no charges would occur. When you are ready to ship this application, just clear the preview certificate number, either from your source code or from the Sales Manager. The next time you perform a purchase or check for update, the information returned will be for active SKUs assigned to this eSeller, and credit cards will be billed.

5. Build your application and try it out.

Note: When you are finished testing your application and ready to ship, remember to clear out the preview certificate number from either your source code (this requires you to rebuild your application) or from the Sales Manager. Also, make sure that the SKUs assigned to your Integrated eSeller are correctly set to Active status.

Note: To install the eSellerate Engine file automatically, you can use the API call **InstallEngine**, which is available for all eSellerate SDK options except the ActiveX control. If you use some other method to install the engine, we recommend that you use version checking to prevent replacing an existing engine with an older version. The engine automatically checks our servers and self-updates when necessary. However, when you replace an existing engine with an older version, your users will experience longer downloads while the engine updates itself.

Tip: If your Integrated eSeller can be run on Mac OS 9, you should allocate at least 500K of additional memory to the application. This will allow the eSellerate Engine to perform various functions. No such memory constraints apply for Integrated eSellers that run exclusively on Mac OS X or Windows, because those operating systems will freely give memory to the application as needed.

CheckForUpdate Redirect Example

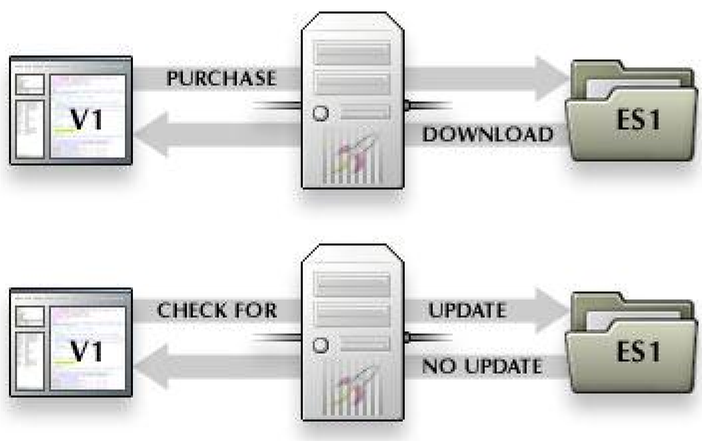
The following example demonstrates how the CheckForUpdate Redirect feature can be used to handle updates throughout several product releases. (For information on how to set the feature, see "Integrated eSeller: CheckForUpdate Redirect" on page 344.)

Releasing Version 1

When first released, software version 1 has no updates available, so no redirect is needed. Instead, you would set up one Integrated eSeller (ES1) to handle both purchase and check for update duties, as shown here.

Primary Sales Agent	Redirect Sales Agent
eSeller RefNum: ES1 **Primary SKU:** SKU1 **CheckForUpdate Redirect:** Use current eSeller, no update available **CheckForUpdate Message:** This is the most current version. **No SKU Message:** Not applicable	Not applicable

Example Settings for Software Version 1



Purchase and Check For Update Behaviors for Software Version 1

Releasing Version 2

To release software version 2, you would need to do the following:

1. Create an eSeller (ES2) for updating to version 2 using the settings shown.
2. Remove the primary SKU from ES1. (For an alternative, see "Keeping Older Software Versions Available" on page 355.)
3. Redirect ES1 to ES2.
4. Update the No SKU Message for ES1.

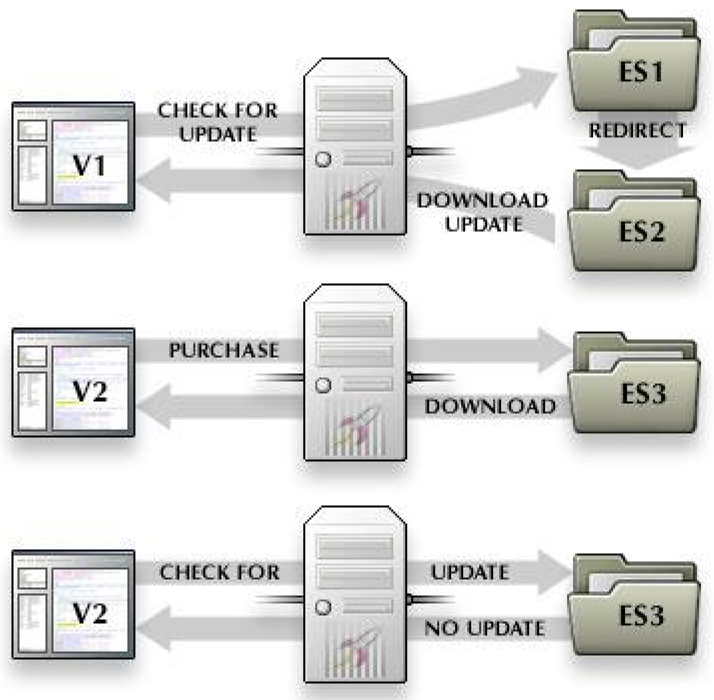
5. Create an eSeller (ES3) for purchasing version 2 using the settings shown.
6. Update your Integrated eSeller application to reference ES3 in Purchase and CheckForUpdate function calls and make the new demo software available to your customers.

Primary Sales Agent	Redirect Sales Agent
eSeller RefNum: ES1 **Primary SKU:** None **CheckForUpdate Redirect:** ES2 **CheckForUpdate Message:** Not applicable **No SKU Message:** A newer version is available. Please download it from our web site and purchase from that version.	**eSeller RefNum:** ES2 **Primary SKU:** SKU2 **CheckForUpdate Redirect:** Use current eSeller, update available **CheckForUpdate Message:** A newer version is available. Click Yes to continue. **No SKU Message:** Not applicable
eSeller RefNum: ES3 **Primary SKU:** SKU2 **CheckForUpdate Redirect:** Use current eSeller, no update available **CheckForUpdate Message:** This is the most current version. **No SKU Message:** Not applicable	Not applicable

Example Settings for Software Version 2

After you made these changes, all existing versions of your product would help customers purchase or upgrade to version 2, as summarized below:

- A customer who initiated a purchase using demo software version 1 would see this message: "A newer version is available. Please download it from our web site and purchase from that version."
- A customer who checked for updates using retail software version 1 would see this message: "A newer version is available. Click Yes to continue." The customer would then be able to obtain retail software version 2.
- A customer who initiated a purchase using demo software version 2 would be able to purchase retail software version 2.



Purchase and check for Update Behaviors for Software Version 2

Releasing Version 3

Each update after version 1 would use the same procedures listed above for version 2. For example, to release software version 3, you would need to do the following:

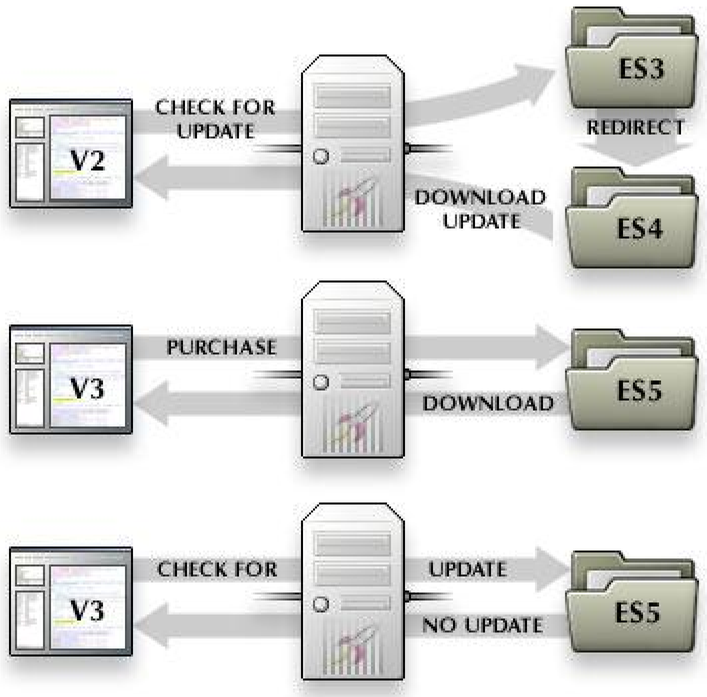
1. Create an eSeller (ES4) for updating to version 3 using the settings shown.
2. Remove the primary SKU from ES3. (For an alternative, see "Keeping Older Software Versions Available" on page 355.)
3. Redirect ES3 to ES4.
4. Update the No SKU Message for ES3.
5. Create an eSeller (ES5) for purchasing version 3 using the settings shown.
6. Update your Integrated eSeller application to reference ES5 in Purchase and CheckForUpdate function calls and make the new demo software available to your customers.

Primary Sales Agent	Redirect Sales Agent
eSeller RefNum: ES3 **Primary SKU:** None **CheckForUpdate Redirect:** ES4 **CheckForUpdate Message:** Not applicable **No SKU Message:** A newer version is available. Please download it from our web site and purchase from that version.	**eSeller RefNum:** ES4 **Primary SKU:** SKU3 **CheckForUpdate Redirect:** Use current eSeller, update available **CheckForUpdate Message:** A newer version is available. Click Yes to continue. **No SKU Message:** Not applicable
eSeller RefNum: ES5 **Primary SKU:** SKU3 **CheckForUpdate Redirect:** Use current eSeller, no update available **CheckForUpdate Message:** This is the most current version. **No SKU Message:** Not applicable	Not applicable

Example Settings for Software Version 3

After you made these changes, all existing versions of your product would help customers purchase or upgrade to version 3, as summarized below:

- A customer who initiated a purchase using demo software version 2 would see this message: "A newer version is available. Please download it from our web site and purchase from that version."
- A customer who checked for updates using retail software version 2 would see this message: "A newer version is available. Click Yes to continue." The customer would then be able to obtain retail software version 3.
- A customer who initiated a purchase using demo software version 3 would be able to purchase retail software version 3.



Purchase and Check for Update Behaviors for Software Version 3

Keeping Older Software Versions Available

The preceding example follows the assumption that only the latest software version will be made available to customers. To keep a software version available after releasing an update, please note the following changes to the steps listed for "Releasing Version 2" on page 351 and "Releasing Version 3" on page 353:

- Do not remove the primary SKU from the eSeller used to handle purchases of the older software version.
- Because the primary SKU will remain available, there's no need to update the No SKU Message for that eSeller.

Chapter 15 - Web Store eSellers

Yet another way you can sell with the eSellerate system is from a full-featured online store. In fact, you can have multiple online stores—each with unique SKUs, pricing and layouts—using eSellerate's Web Store eSellers.

Tip: A quick start guide is available to help you learn about eSellerate and get your first web store up and running. See "Quick Start Guide" on page 23.

Information about Web Store eSellers appears here as follows:

Overview

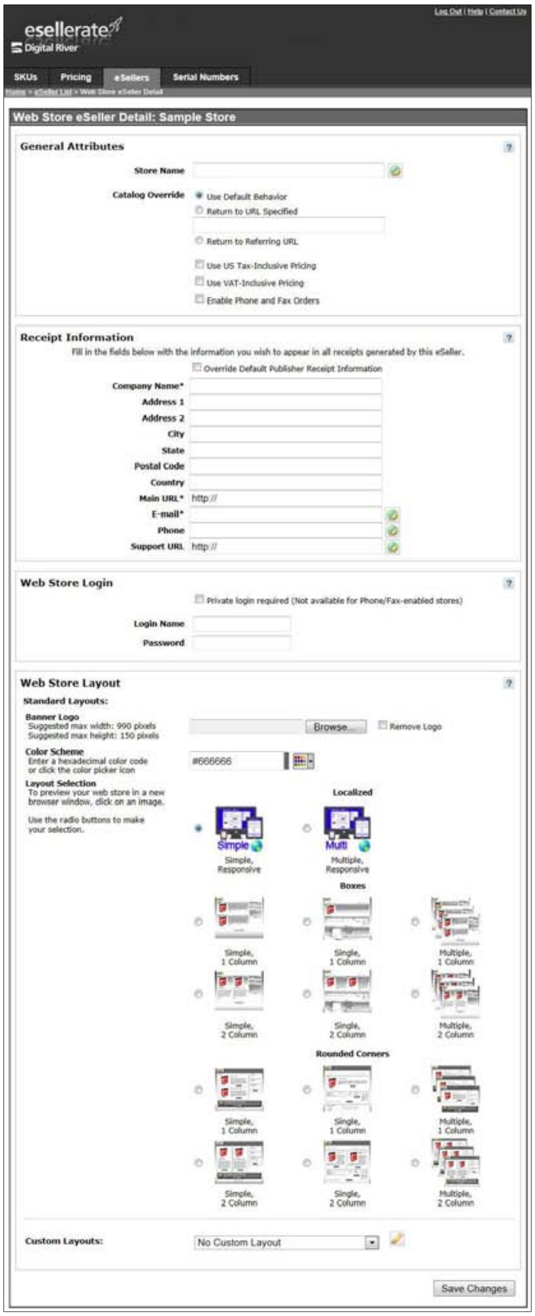
The basic steps for creating a Web Store eSeller are:

1. Create a Web Store eSeller in the eSellerate Sales Manager. See "Creating a Web Store eSeller" on the facing page.
2. Display links to the Web Store eSeller on select web sites. These might include your company web sites and those of your affiliates. See "Web Store: Links" on page 368.

Creating a Web Store eSeller

To create a Web Store eSeller:

1. Go to http://www.esellerate.net and log in. The home page appears.
2. Under SKU Management, click **eSellers**. The eSeller List page appears.
3. To the right of Create New, click **Web Store**. The Web Store eSeller Detail page appears.



4. Complete the Detail page settings as described at:
   - "Web Store: General Attributes" on next page
   - "Web Store: Receipt Information" on page 361

   - "Web Store: Private Login" on the facing page
   - "Web Store: Layout" on the facing page
5. Click **Save**.

Web Store: General Attributes

The General Attributes section of the Web Store eSeller Detail page includes the options described here.

- **Store Name** – In the **Store Name** field, enter a name for this web store. The store name appears in the footer of all Standard Layouts and default Custom Layouts.
- **Catalog Override** – The Catalog Override option can be useful if you plan to display your product catalog on your own web site, and direct customers to your eSellerate web store when they purchase or try out software. (See the More URL option at "Web Store: Links" on page 368.) To help customers return to your web site after a software purchase or trial software download, you can control the behavior of the following navigation options within your web store:
   - The Continue Shopping button displayed prior to a purchase
   - The Continue Shopping link displayed after a purchase

  To set the override option, either select **Return To URL Specified** (and then enter the URL), or select **Return To Referring URL**.

  > **Note:** If you use the override option, do not assign categories to your Web Store SKUs. By not using Web Store Categories, you will eliminate navigation by category, which would direct customers through the web store catalog pages rather than back to your web site. (See "Adding Web Store SKUs" on page 364.)

- **Use US Tax-Inclusive Pricing** – By default, the pricing in this store will exclude US tax, so that customers pay the unit prices plus any applicable US tax. Another option is to use US tax-inclusive pricing, which ensures your customers pay the exact prices shown on your store's catalog pages, with no additional costs when taxes apply. (In the shopping cart, US tax will be subtracted from the original prices, and the total tax amount will be displayed as a separate line item.) To include US tax in the pricing for this store, select the **Use US Tax-Inclusive Pricing** check box. For more information, see "Tax-Inclusive Pricing" on page 374.

  > **Caution**: If you switch to tax-inclusive pricing, your net earnings will be reduced unless you increase the prices of all items in this store to make up for the tax amounts. To make those adjustments, we recommend using Native Currency Pricing, which will allow you to set pricing for SKUs, eCD and other items in your customers' preferred currencies. See "Setting Up Pricing" on page 67.

- **Use VAT-Inclusive Pricing** – By default, the pricing in this store will exclude Value Added Tax (VAT), so that customers pay the unit prices plus any applicable VAT. Another option is to use VAT-inclusive pricing, which ensures your customers pay the exact prices shown on your store's catalog pages, with no additional costs when VAT applies. (Text in the shopping cart will indicate when the grand total includes VAT.) To include VAT in the pricing for this store, select the **Use VAT-Inclusive Pricing** check box. For more information, see "Tax-Inclusive Pricing" on page 374.

  > **Caution**: If you switch to tax-inclusive pricing, your net earnings will be reduced unless you increase the prices of all items in this store to make up for the tax amounts. To make those adjustments, we recommend using Native Currency Pricing, which will allow you to set pricing for SKUs, eCD and other items in your customers' preferred currencies. See "Setting Up Pricing" on page 67.

- **Enable Amazon Fulfillment** – If your account is set up to integrate with Amazon Fulfillment, an **Enable Amazon Fulfillment** check box will be available. Selecting this check box will set up this web store to use Amazon Fulfillment for all order items that require shipping. See also "Integrating with Amazon Fulfillment" on page 154.

- **Enable Phone and Fax Orders** – If you want to enable phone and fax orders for this web store, select the appropriate check box. For more information, see "Enabling Phone and Fax Orders" on page 370.

Web Store: Receipt Information

The Receipt Information section of the Web Store eSeller Detail page includes the options described here.

If you would like this eSeller to use different receipt information than the defaults set at the Receipt Information page, follow the instructions below. Otherwise, you can skip this step (and leave the Receipt Information section for this eSeller blank).

To use the override option, select the **Override Default Publisher Receipt Information** check box and then enter your receipt information. Required fields are marked with an asterisk.

Information you enter here will be used in the following places:

- Receipts created at the conclusion of a purchase (see also "Receipt Page Notes" on page 293)
- Order Confirmation, Order Fulfillment and Return Notification e-mail sent to the customer
- eSellerate Order Notice e-mail sent to the addresses specified for the per-transaction report (available through Account Information)
- Packing slips
- CD labels used in eCD fulfillment
- Order information accessed by customers through eSellerate Credit Card Charges Information (http://www.eslr8.com) and eSellerate After-Purchase Services (http://store.eSellerate.net/support)

Note: With the exception of the eSellerate Order Notice e-mail, per-eSeller receipt information affects customer communications only. All other e-mail that you receive from eSellerate will use the defaults set at the Receipt Information page when applicable.

Note: There are some settings on the Receipt Information page that you cannot affect by overriding default receipt information. These settings are the introductory text and product support text for Order Confirmation and Order Fulfillment e-mail, as set in the Customized Order E-mail section.

Web Store: Private Login

If you would like to create a private web store that requires a login, use the Web Store Login section of the Web Store eSeller Detail page. You will need to select the **Private login required** check box, and enter the desired login name and password.

Web Store: Layout

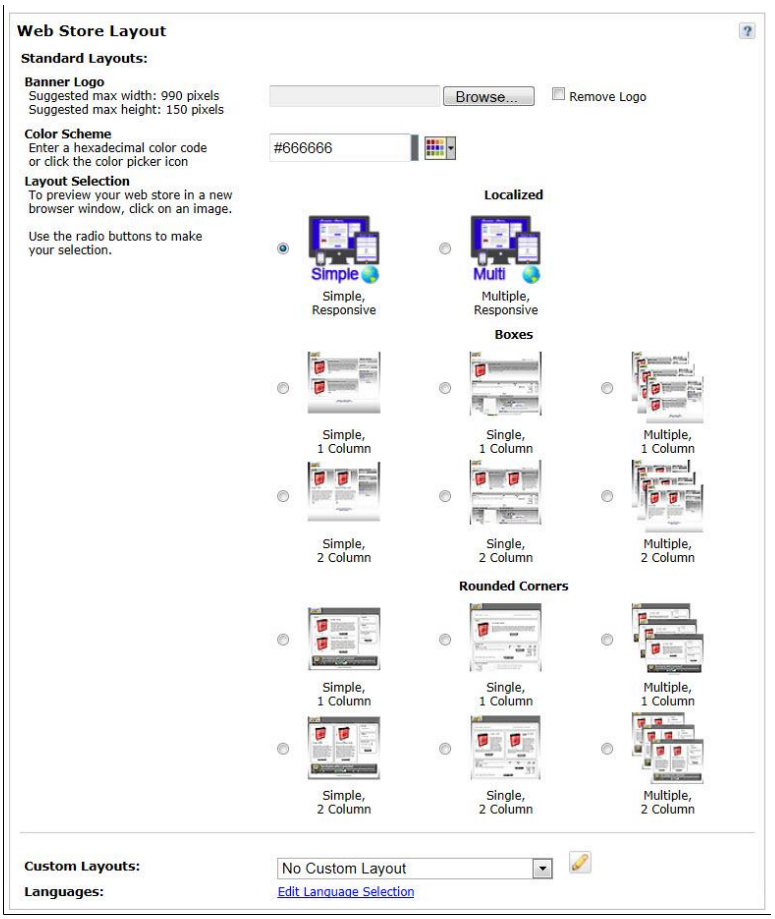
The Web Store Layout dialog box presents two primary layout options for your web store:

- The Standard Layouts option, which offers 14 different layouts that support limited customization
- The Custom Layouts option, which offers several different default layouts that support major customization

Note: With both of the primary layout options, you have the ability to localize the content (when using a localized layout). By default, a web store will display content in English only. If you plan to localize a store for other languages, you can specify those languages by clicking **Edit Language Selection**, and then following the instructions provided. (Edit Language Selection becomes available in the lower portion of the page after you save a new Web Store eSeller for the first time.)

To select a layout option, do one of the following:

- To select a Standard Layout, follow the instructions below.
- To select a Custom Layout, use the **Custom Layout** list. If you need to edit or create a layout before making this selection, you can click the **Edit Custom Layouts** icon to do so, and then return to the Web Store eSeller Detail page.



Information on how to select and customize a Standard Layout follows.

Banner Logo

To upload a banner logo for your store, click **Browse** (or **Choose File** if you're using Chrome or Safari) and then select the desired file. The upload will begin when you save your changes.

Note: Banners that you upload to the Sales Manager must be in PNG, JPG, GIF or BMP formats. For best results, we recommend using 8-bit graphics with a resolution of 72 pixels per inch. While you can use larger images, your web store customers will experience longer loading times.

The suggested maximum width and height for banner logos is 990 pixels and 150 pixels, respectively.

You should not save these files in MacBinary format, even if you're uploading them from a Macintosh.

Color Scheme

Your store will use the color scheme that you specify here. You can accept the default value of 666666, which is a shade of gray, or you can use a different color.

To specify a color, either enter its hexadecimal color code (six digits, without the number sign), or click the color picker icon and make your selection from the color picker. The picker has three tabs, which work as follows: Within the **RGB** or **Named colors** tabs, you can click on a color to select it. Within the **Color slider** tab, once you have the desired RGB combination, you can click on the colored bar at the bottom (which shows the current color) to make your selection.

You can preview your color selection in any of the Standard Layouts, as described below.

Layout Selection

Your choices for Standard Layouts include:

- Localized layouts
- Boxes or rounded corners
- Simple, single-page or multi-page
- One or two columns

You can click any of the 14 images to view a preview of your web store with that layout, using the last color selection that you saved. The preview will also provide a description of the layout.

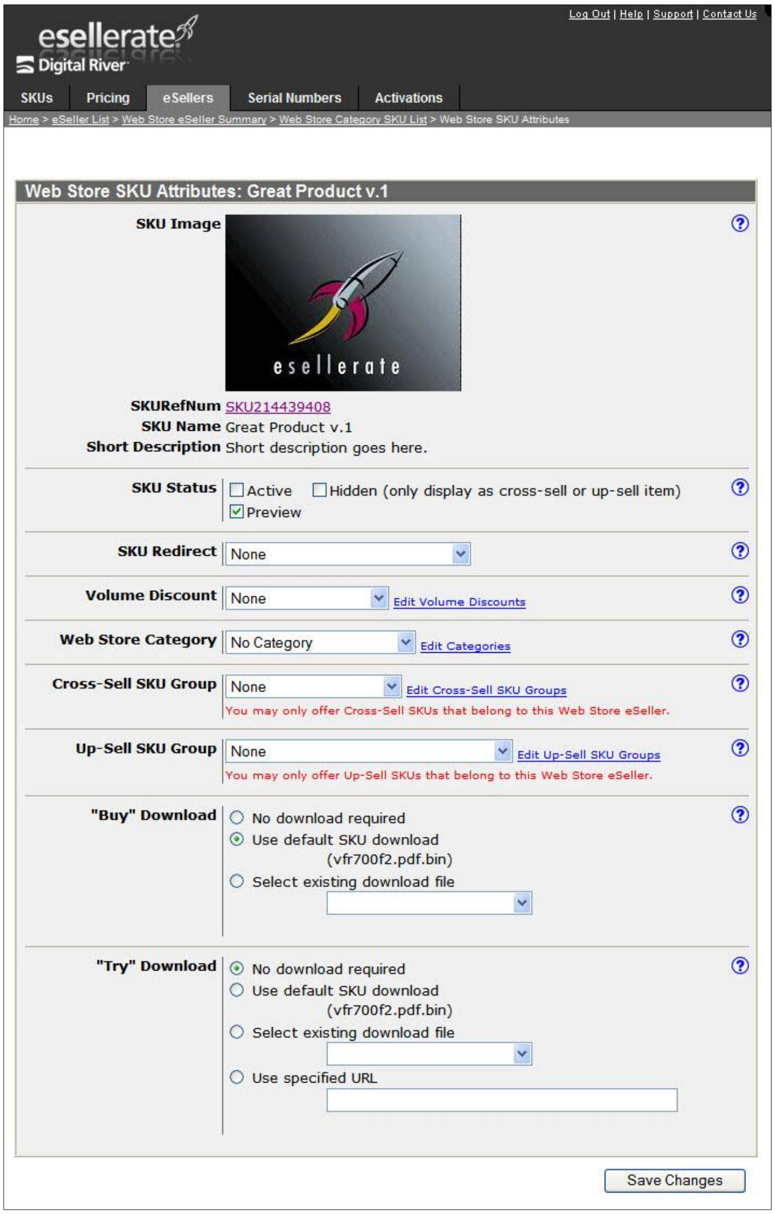
To select a layout, click the radio button next to its image.

Adding Web Store SKUs

Next, you'll add SKUs to sell in your web store.

To add Web Store SKUs:

1. In the Web Store SKU Categories section of the Web Store eSeller Summary page, click **Add SKU**. This will display all your SKUs, separated by the current Rows per Page value, which is 5 by default.
2. Click through the product pages to find your SKU, or use the SKU Search feature.
3. Click a radio button to select a SKU to add to your eSeller.
4. Click **Add Selected SKU**. The Web Store SKU Attributes page appears.



5. Complete the Attributes page settings as described at:
    - "Web Store SKUs: SKU Attributes" below
    - "Web Store SKUs: SKU Status" below
    - "Web Store SKUs: SKU Redirect" below
    - "Web Store SKUs: Volume Discount" below
    - "Web Store SKUs: SKU Category" on next page
    - "Web Store SKUs: Cross-Sell SKU Group" on next page
    - "Web Store SKUs: Up-Sell SKU Group" on next page
    - "Web Store SKUs: Buy Download" on next page
    - "Web Store SKUs: Try Download" on next page
6. Click **Save Changes**. Repeat this process to add as many SKUs as desired.
7. When you're finished, click **Return to eSeller**.

Web Store SKUs: SKU Attributes

This information in the top section of the Web Store SKU Attributes page identifies the SKU currently open for editing. With the exception of SKURefNum, which is not editable, you can set these attributes on the Basic tab of the SKU Detail page.

Web Store SKUs: SKU Status

In the SKU Status section of the Web Store SKU Attributes page, you can set this SKU's status (Active, Preview, both or neither). A SKU with Active status will be available through your active web store. Use Preview status to make the SKU available for testing in your preview web store.

The **Hidden (only display as cross-sell or up-sell item)** option applies if you are cross-selling or up-selling this SKU within your web store. Select the check box for this option if you want to offer the SKU only when your customers select other SKUs for their purchases. Otherwise, the SKU will display as any combination of the following:

- A regular catalog item
- A cross-sell item
- An up-sell item

Links to your active and preview web stores are available at Home > eSeller Lists > Web Store eSeller Summary.

Web Store SKUs: SKU Redirect

The SKU Redirect feature allows you to bypass the current Web Store SKU when you want to make a different SKU available for purchase. When a customer uses a direct "Buy" link to initiate a purchase of the current SKU, the SKU you specified in the **SKU Redirect** list will be made available instead.

Tip: For a look at all the SKU Redirects set up for your Web Store eSellers, use the SKU Redirects report, which is available in Admin Reports.

Web Store SKUs: Volume Discount

The Volume Discount list is for assigning a volume discount set to this SKU. If you use this option, your web store customers will be able to click a link to view this SKU's volume discount information.

Note: For a SKU to support volume discounts, it must have Allow Multi-Quantity Sales enabled. That option is available on the Advanced tab of the SKU Detail page.

Click the **Volume Discount** list to select a volume discount, or click **Edit Volume Discounts** to edit or create one. Otherwise, select **None** to skip this option.

Web Store SKUs: SKU Category

The Web Store Category list is for organizing the display of SKUs in your web store. These categories will display in alphabetical order by default, or you can set the display order from the Web Store eSeller Summary page.

Note: Web Store SKUs that use no category will always appear last in your web store.

Click the **Web Store Category** list to select a category, or click **Edit Categories** to edit or create one. Otherwise, select **No Category** to skip this option.

Web Store SKUs: Cross-Sell SKU Group

When a web store customer adds this SKU to the shopping cart, you can offer other SKUs for sale in conjunction with the purchase. To set up this cross-selling relationship, you would assign a cross-sell SKU group to this SKU.

Note: You can only offer cross-sell SKUs that belong to this Web Store eSeller.

Click the **Cross-Sell SKU Group** list to select a group, or click **Edit Cross-Sell SKU Groups** to edit or create one. Otherwise, select **None** to skip this option.

Web Store SKUs: Up-Sell SKU Group

When a web store customer chooses to purchase this SKU, you can offer one or more higher priced alternatives. To set up this up-selling relationship, you would assign an up-sell SKU group to this SKU.

Note: You can only offer up-sell SKUs that belong to this Web Store eSeller.

Click the **Up-Sell SKU Group** list to select a group, or click **Edit Up-Sell SKU Groups** to edit or create one. Otherwise, select **None** to skip this option.

Web Store SKUs: Buy Download

In the "Buy" Download section, you can specify the file to download when customers purchase this Web Store SKU. Your choices are as follows:

- Use no download.
- Use the default SKU download. (This is the default setting.)
- Use an existing download file other than the default SKU download.
- The download file that you specify for this SKU will override the default SKU download, if the two files are different. This behavior enables a SKU to have an individual download for each eSeller that uses it.

Tip: To delete a download file, use the Downloads editor (available in the References section of the eSellerate Sales Manager).

Web Store SKUs: Try Download

In the "Try" Download section, you can specify the file to download when your customers click the Try button for the product. Your choices are as follows:

- Use no download.
- Use the default SKU download. (This is the default setting.)

- Use an existing download file other than the default SKU download.
- Use a direct link to a download file outside of the eSellerate system. In this case, eSellerate will not track bandwidth usage for the download because it resides on an external site. Also, the More URL page—which lists direct links to various locations within your web store—will not include the external link.

The download file that you specify for this SKU will override the default SKU download, if the two files are different. This behavior enables a SKU to have an individual download for each eSeller that uses it.

Tip: To delete a download file, use the Downloads editor (available in the References section of the eSellerate Sales Manager).

Web Store: Links

The following information applies to the Web Store Links section of the Web Store eSeller Summary page.

Active URL, Preview URL

For each web store you create, you are provided an Active URL and Preview URL link. The Active URL is a public link to your web store. This link is for use in your company web site and marketing materials. The Preview URL is for internal testing purposes only. This allows you to set up and test SKUs in Preview mode before making the changes available in your public web site.

You set a SKU's status (Active, Preview, both or neither) within its respective eSeller dialog. This enables a SKU to have an individual status for each eSeller that uses it. In Web Store SKUs, these settings are at Home > eSeller Lists > Web Store eSeller Summary > Web Store SKU attributes.

More URLs

For a listing of direct links to various locations in this web store, click the link next to More URLs. You can copy any of the displayed links to use on your company web site and/or distribute to your sales partners.

Web Store: Store SKU Categories

After you add SKUs to your Web Store eSeller, you can organize the SKUs by category, and control their display order in the web store. These settings are available in the Web Store SKU Categories section of the Web Store eSeller Summary page.

Setting Category Display Order

By default, the SKUs you add to this Web Store eSeller will display in alphabetical order according to category. To change the ordering for a given category, enter a number (0-999) in its **Display Order** field and then click **Update Display Order**.

Categories with the same Display Order value will display in alphabetical order.

SKUs that use no category will appear under No Category on this page, and will always display last in the web store.

Setting SKU Display Order

By default, SKUs will display in alphabetical order within categories. To change the SKU ordering within a category, click the category name. The Web Store Category SKU List page will display. To change the ordering for a given SKU, enter a number (0-999) in its **Display Order** field and then click **Update Status**.

SKUs with the same Display Order value will display in alphabetical order.

Tip: The increments you use for SKU display order should reserve enough space for future SKU entries to fit in when needed. For example, the Display Order values for SKUA, SKUB and SKUC could be 25, 50 and 75, respectively.

Enabling Phone and Fax Orders

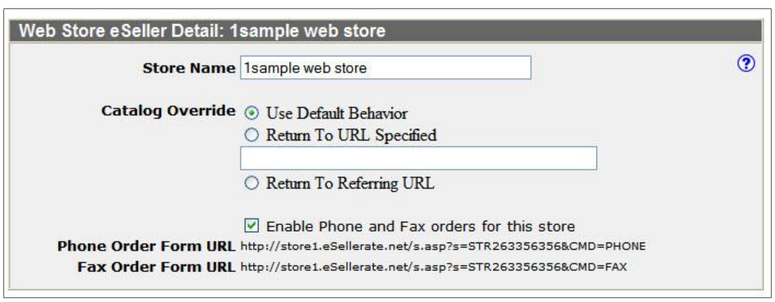
For your customers that may prefer alternatives to purchasing online, eSellerate supports phone and fax orders. You can use this service to enable phone/fax ordering of the products offered in your eSellerate web store(s). Implementation is as simple as setting one option in the eSellerate Sales Manager and displaying phone and fax order links for your products on your company web site.

Terms of use for phone/fax orders are as follows:

- Hours of operation are Monday through Friday, 9 a.m. to 5 p.m. Central Time (excluding American holidays). Fax orders may be sent anytime but will only be processed during normal business hours. Phone orders will only be accepted during normal business hours.
- There is a $20 monthly fee for using eSellerate's phone/fax order service. On the first day of each month, eSellerate will create a $20 negative adjustment to your account balance if you had the phone/fax checkbox enabled for your web store(s) at any time during the previous month.
- All sales will be by credit card and in one of the currencies accepted by eSellerate.
    - Because PayPal users have no way to authenticate their purchases when ordering by phone or fax, eSellerate does not accept that payment method for phone/fax orders.
- The supported language for phone/fax orders is English only.
- Publishers using this service waive terms of sale for products sold by phone or fax.
- Shipping is not available for fax orders. Accordingly, the fax order form will exclude SKUs that require shipping. This restriction exists because a customer cannot properly determine shipping costs or shipping options provided by a publisher from a static form.
- Phone/fax order service is not available for private web stores.

To implement phone/fax orders:

1. From the eSeller List page, select a Web Store eSeller and open it for editing.
2. Click **Edit eSeller**. The Web Store eSeller Detail page appears.
3. Select the **Enable Phone and Fax Orders** check box. Two URLs will display—one for fax and one for phone order forms.

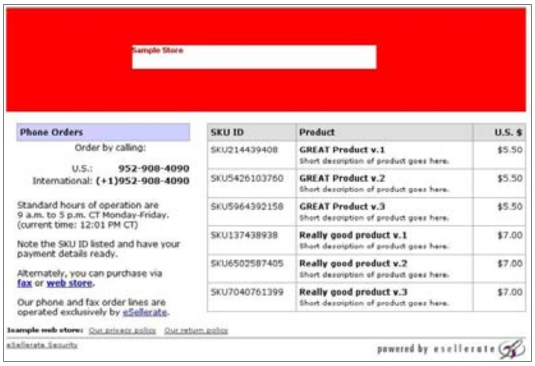


4. Copy either or both of the URLs for use in your company web site. These URLs will allow you to provide the respective order options for your customers.
5. Click **Save Changes**.

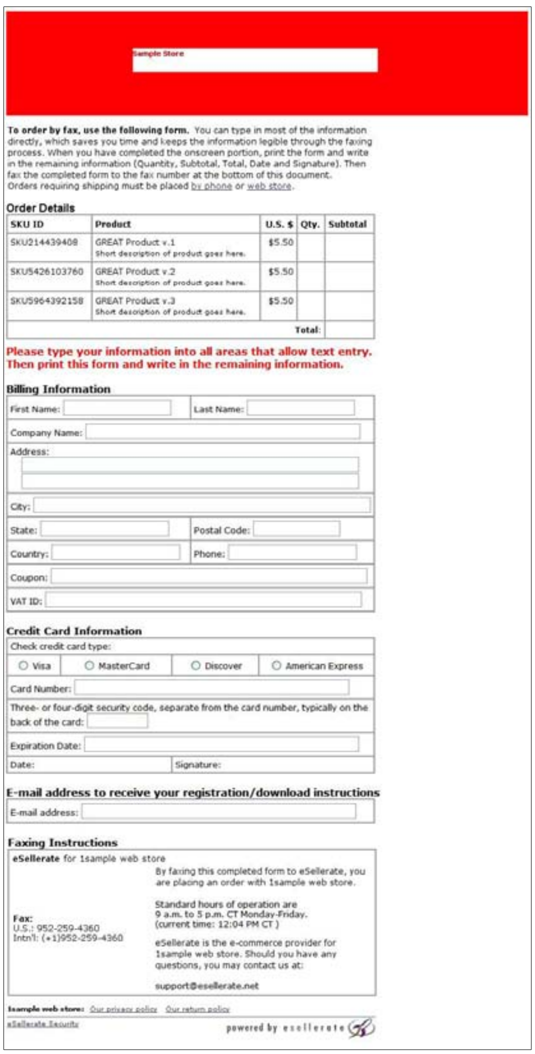
An overview of the purchase process follows:

1. A customer clicks a link on your company web site to enact one of the following purchase options:
    - Phone order
    - Fax order
2. A web page displays all active SKUs in your web store, along with pricing in U.S. dollars and short

descriptions. (This excludes hidden SKUs, which only display as cross-sell items. Also, fax order pages exclude SKUs that require shipping.)



Sample Phone Order Web Page



Sample Fax Order Web Page

3. The customer places an order in one of these ways:
    - For a phone order, the customer calls and provides order information to an eSellerate representative.
    - For a fax order, the customer types in most of the order information directly. The customer then prints out the fax form, completes it and faxes it to eSellerate.
4. The eSellerate representative enters the order on a secure intranet system. Order processing then proceeds like any other eSellerate purchase.
5. The customer receives order confirmation (including registration information) and shipping e-mail messages as required.
6. When purchases involve a digital download, the order confirmation message will include a special URL that the customer will use to download the product.

Tip: To view phone or fax orders placed for your products, go to the Order Search page and run a search for either order method.

Chapter 16 - Miscellaneous

The "Miscellaneous" grouping is for topics that don't fit neatly into any other areas of this user's guide. These include:

Tax-Inclusive Pricing

Note: Standard Layouts will provide tax-inclusive functionality by default. Custom Layouts created prior to August 31, 2010, will need updating before they can represent tax-inclusive pricing as described here. A document that explains how to update layouts for tax-inclusive pricing is available for downloading at http://support.esellerate.net/FileManagement/Download/9de8c14809b94bd8bb04499c5c81d0ae.

Tax-inclusive pricing is an option that ensures your customers pay the exact prices shown on your store's catalog pages, with no additional costs when taxes apply. In contrast to this option, the default pricing behavior is to exclude taxes from displayed prices, in which case customers pay the unit price plus applicable taxes.

Tax-inclusive pricing is supported for Web Store eSellers (with Custom Layouts or Standard Layouts) and Embedded Web Store eSellers. It is available for use with US tax and Value Added Tax (VAT). In both cases, the taxable amount is subtracted from the unit price, but the way this is presented to customers differs according to the tax type. The differences are as follows:

- With US tax, the prices shown to customers on the catalog page will be adjusted for taxes later in the purchase process. When this happens, tax is subtracted from the original prices, and the total tax amount is displayed as a separate line item. For example, assume that the SKU price shown on the catalog page is $10. Once a tax rate of 7 percent has been applied, the shopping cart will show $9.35 for the SKU and $0.65 for tax. The price stored in order history for the SKU will be $9.35.
- With VAT, the prices shown to customers are not adjusted for taxes, but text in the shopping cart indicates when the grand total includes VAT. For example, assume that the SKU price shown on the catalog page is 1000 EUR, and the order will include this one item only. Once a VAT rate of 19 percent has been applied, the shopping cart will show 1000 EUR for the SKU and 1000 EUR for the grand total. Under the grand total the following line will appear: "*Includes 19.00% VAT of 159.66 EUR". The price stored in order history for the SKU will be 840.34 EUR (see "Order History" on the facing page). If the cart had contained multiple items the line under the grand total would have listed the VAT amounts for each item, in the order that the items appeared in the cart.

More information on tax-inclusive pricing follows.

Pricing Considerations

When customers pay tax under tax-inclusive pricing, the publisher's net earnings are reduced by the amount of the taxes. You can avoid losing revenue on taxable orders by increasing the prices of all items in your store to make up for the tax amounts. To make those adjustments, we recommend using Native Currency Pricing, which will allow you to set pricing for SKUs, eCD and other items in your customers' preferred currencies.

Another good practice with VAT-inclusive pricing is to implement location-specific stores to cover the countries that collect VAT.

Also note:

- For a tax-inclusive order including eCD, the total tax cost for eCD is subtracted from the publisher markup amount (see the eCD Configuration tab for that amount). For example, assume that the eSellerate eCD charge is $5 and the publisher markup is $5, for a total purchase price of $10. With a 7 percent tax rate, the total tax cost on $10 is $0.66. The publisher net earnings for a tax-inclusive sale would then be (5 – 0.66) = $4.34.
- For a tax-inclusive order including eSellerate Download Protection (eDP), the total tax cost for eDP is subtracted from the eSellerate portion of the price (currently $3.99). Therefore, the publisher net earnings remain at $1 for each eDP SKU sold, and are unaffected by tax-inclusive pricing.

VAT IDs

When the customer enters a valid VAT ID for a VAT-inclusive order, no VAT is charged, but it is subtracted from the prices of all items subject to the tax. This is the only time when prices are shown to the customer adjusted for VAT.

Order History

When showing tax-inclusive orders to publishers, eSellerate treats VAT and US tax the same, by breaking out tax as a separate line item and listing unit prices adjusted for taxes. The adjusted prices are what the publisher earned on the sale.

This applies everywhere publishers can see order details, including publisher e-mail notifications, eSellerate reports and the Order Detail page.

Subscription Orders

Recurring billings during the subscription period will honor the tax-inclusive settings that were in effect when the order was placed. Renewal billings will honor the current tax-inclusive settings for the eSeller that handled the original subscription order.

If the customer enters a valid VAT ID when placing a subscription order, no VAT will be charged for recurring billings or renewals, and this will continue for the life of the subscription.

If the customer does not enter a VAT ID when placing a subscription order but later requests a tax-only refund (using a valid VAT ID), no VAT will be charged for recurring billings or renewals after the refund is processed, and this will continue for the life of the subscription.

Rules for Applying Tax

- **eCD** – eCD is taxable. See the notes under "Pricing Considerations" on previous page.
- **eDP** – eDP is taxable. See the notes under "Pricing Considerations" on previous page.
- **Cross-sells and up-sells** – If the price is reduced by a cross-sell or up-sell offer, the offer is applied first and then the remaining amount is taxable.
- **Volume discounts** – The volume discount is applied first and then the remaining amount is taxable.
- **Coupons** – The coupon discount is applied first and then the remaining amount is taxable.
- **Shipping** – Shipping costs are taxable, but only for orders subject to US tax.
- **SKUs in channel or affiliate stores** – Tax-inclusive status for the publisher store does not carry over to the channel or affiliate stores. Channels and affiliates would need to set up their own eSellers as tax-inclusive if that type of pricing is needed.

Tax-Only Refunds

There are no special considerations for doing tax-only refunds on tax-inclusive orders.

See Also

"Tax-Only Refunds" on page 121

"Embedded Web Store: General Attributes" on page 320

"Web Store: General Attributes" on page 360

PayPal Payments

PayPal is one of several payment methods that eSellerate supports. When customers choose the PayPal payment method, the eSellerate store directs them to PayPal's Express Checkout interface, where they can quickly authenticate their payments. After authentication, the customers return to the eSellerate store to complete their purchases.

Notes on eSellerate's PayPal support

- Accepting payments through PayPal is an option for Web Store eSellers (with Custom Layouts or Standard Layouts) and Embedded Web Store eSellers only.
- eSellerate can accept PayPal payments in the following currencies: U.S. Dollar (USD), Canadian Dollar (CAD), Australian Dollar (AUD), Euros (EURO), British Pound (GBP) and Japanese Yen (JPY).
- PayPal can be used as the payment method for subscription orders.
- When customers authenticate their PayPal payments, they select a funding source. eSellerate does not allow customers to select eCheck as a funding source, because the time required for those payments to clear would delay fulfillment.
- Although PayPal accounts can include information such as as billing address and shipping address, none of that information transfers to eSellerate when customers authenticate their payments. Customers still need to enter that information, just as they would for any other payment method that eSellerate supports.
- When customers pay with PayPal, eSellerate captures all funds at the conclusion of the purchase, even when the order involves shipping.
- PayPal conducts its own fraud screening when customers attempt to authenticate their payments. These precautions are in addition to the ones eSellerate takes to protect against fraud.
- PayPal does not accept orders larger than $10,000 USD. When orders involve other currencies, PayPal enforces the limit based on the order equivalent of $10,000 USD.
- When you conduct test purchases in preview mode, eSellerate provides a simulated PayPal Express Checkout interface for the authentication process. As with all preview orders, eSellerate's preview banner will display at the bottom of the store pages, and payment processing will execute in demo mode only, so that no charges occur.
- The process that you follow to return PayPal orders is the same as for orders that involve other payment methods, such as credit cards. (See also "Returning Orders" on page 114.)
- As is the case with other payment methods, customers who pay for their purchases with PayPal should contact you directly if they want to request refunds. If they contact PayPal with those requests instead, the process is as follows:
  - When customers contact PayPal to request refunds or dispute charges to their accounts, PayPal assigns a case ID to each incident, and relays the information to eSellerate.
  - eSellerate evaluates the information, and processes returns when appropriate.
  - When these returned orders appear in eSellerate reports, the RMA Number field presents the case ID. An example case ID is PP-123-456-789.
- A key component of PayPal functionality is that the Custom Layout must have a Confirmation Page assigned. (You make page assignments on the Settings tab of the Custom Layouts Detail page.) Layouts that do not have a Confirmation Page assigned will not accept PayPal payments.
- Another eSellerate offering related to PayPal is that we can direct your payments to a PayPal account. This offer is available only to publishers who also have adopted PayPal as an option for their customers. Payments are in U.S. dollars only. If you are interested in the PayPal payment option, please contact your assigned account executive.

E-check (ACH) Payments

Information on the e-check (ACH) payment option for eSellerate orders follows.

Standards

- This option is turned on by default for all publishers.
- Accepting ACH payments is an option for Web Store eSellers (with Custom Layouts or Standard Layouts) only.
- ACH can be used as the payment method for subscription orders. Publishers offering ACH may want to consider adding a grace period to their subscriptions to account for the longer processing times (compared to credit cards or PayPal).
- ACH is available only for USD transactions with a billing address in the United States.
- Custom Layouts created prior to when eSellerate introduced ACH payments (August 31, 2010) will need updated. See "Payment Methods Integration" on page 295.

Customer Experience

- Customers who select ACH as the payment method will need to check a box signifying that they agree to the ACH terms and conditions. Along with their banking information, they will need to provide the last four digits of their driver's license number and select the driver's license state. A check image is available for showing customers where to find the required banking information.
- ACH takes 5-7 business days to complete, and processing does not happen on weekends or holidays.
- When customers finish placing their orders, they will receive an order processing e-mail that explains a pending order has been set up. This e-mail will show the order number, order date, publisher name, order item details and amount due.
- The orders are in a pending state until payment is received.
- Once the ACH request has cleared their bank, the customers will receive all normal correspondence that their order is complete. Downloads will become available, serial numbers will be issued, eCD orders will be sent, and so on. The publisher can complete fulfillment (ship items if needed) at this time.
- If there is an issue with subscription recurring or renewal billings, the customers will receive an e-mail with instructions on how to update their payment information through eSellerate After-Purchase Services (http://store.esellerate.net/support).

Publisher Details

- Publishers do not receive their payments on these orders until eSellerate receives and processes the customers' payments.

International Wire Payments

Information on the international wire payment option for eSellerate orders follows.

Standards

- This option is turned on by default for all publishers.
- Accepting international wire payments is an option for Web Store eSellers (with Custom Layouts or Standard Layouts) only.
- International wire can be used as the payment method for subscription orders, but only under special circumstances. These special circumstances are when the following conditions are true for all subscriptions in the shopping cart:
  - The renewal policy is manual renewal.
  - The duration and billing frequency are such that no recurring billings occur during the duration of the subscription. For example, if the duration is 12 months, the billing frequency must be every 12 months so there are no charges other than at the beginning of the subscription period, and optionally at the end of the period, if the customer manually renews.
- This payment option is available only when the customer's selected country and currency match one of the following pairs:

  Austria – EUR Euros

  Belgium – EUR Euros

  Switzerland – CHF Swiss Francs

  Germany – EUR Euros

  Denmark – DKK Danish Kroner

  Finland – EUR Euros

  France – EUR Euros

  Great Britain – GBP British Pounds

  Greece – EUR Euros

  Italy – EUR Euros

  Netherlands – EUR Euros

  Sweden SEK – Swedish Kronor
- A $20 USD, non-refundable wire transfer fee is applied to all wire orders. This fee is clearly stated when customers choose wire transfer as the payment method.
- Custom Layouts created prior to when eSellerate introduced international wire payments (August 31, 2010) will need updated. See "Payment Methods Integration" on page 295.

Customer Experience

- Customers choose wire transfer as the payment method. A message states that there will be a non-refundable wire transfer fee. The fee amount listed will be converted from $20 USD to the currently selected currency.
- On the receipt page, customers will see information on where to send their wire transfers.
- When customers finish placing their orders, they will receive an order processing e-mail that explains a pending order has been set up, and repeats the details on where to send the wire trans-

fers. This e-mail will show the order number, order date, publisher name, order item details and amount due.

- The orders are in a pending state until payment is received.
- Once the wire payment is received, the customers will receive all normal correspondence that their order is complete. Downloads will become available, serial numbers will be issued, eCD orders will be sent, and so on. The publisher can complete fulfillment (ship items if needed) at this time.

Publisher Details

- Publishers do not receive their payments on these orders until eSellerate receives and processes the customers' payments.

Purchase Order Payments

The ability to accept purchase order payments is available on request. If you are interested in using this option, please contact your assigned account executive.

Standards

- Accepting purchase order payments is an option for Web Store eSellers (with Custom Layouts or Standard Layouts) only.
- Purchase orders can be used as the payment method for subscription orders, but only under special circumstances. These special circumstances are when the following conditions are true for all subscriptions in the shopping cart:
  - The renewal policy is manual renewal.
  - The duration and billing frequency are such that no recurring billings occur during the duration of the subscription. For example, if the duration is 12 months, the billing frequency must be every 12 months so there are no charges other than at the beginning of the subscription period, and optionally at the end of the period, if the customer manually renews.
- Purchase orders cannot be used when the order total is less than $250.
- Payments must be in US dollars, and drawn on a US bank.
- Custom Layouts created prior to when eSellerate introduced purchase order payments (August 31, 2010) will need updated. See "Payment Methods Integration" on page 295.

Customer Experience

- For purchase orders to be available as a payment option, the following must be true:
  - If any of the items in the shopping cart use subscriptions, those subscriptions must meet the conditions listed under "Standards" above.
  - The cart subtotal is at least $250.
  - The selected currency is USD.
- Customers can enter a purchase order number if it is known, but that field is not required at the time of purchase.
- While company name is typically not a required entry, customers must enter it when using this payment option. An error message will be displayed if the customer submits order information without entering a company name.
- Aside from the purchase order number (if entered) and a company name, no special information is collected from the customer in regards to purchase order payments.
- On the confirmation and receipt pages, customers will see the fax number and the mailing address for sending their purchase orders. Customers are encouraged to include their eSellerate order number when faxing or mailing their completed purchase orders.
- When customers finish placing their orders, they will receive an order processing e-mail that explains a pending order has been set up, and repeats the details on where to send the purchase orders. This e-mail will show the order number, order date, publisher name, order item details and amount due.
- Once the purchase order is received and the credit check is completed and approved, the customers will receive all normal correspondence that their order is complete. Downloads will become available, serial numbers will be issued, eCD orders will be sent, and so on. The publisher can complete fulfillment (ship items if needed) at this time.
  - If the customer’s credit is declined, the customer will receive an e-mail that explains there was an issue with the order, and suggests using a different payment method.
- Once a purchase order is approved, the customer still needs to send the payment to eSellerate.

Publisher Details

Publishers do not receive their payments on these orders until eSellerate receives and processes the customers' payments.

Localizing eSellerate Stores

Information on localizing eSellerate stores appears here as follows:

- "Localization Overview" below
- "Localization Steps for Publishers" below
- "Information for Translators" on page 387
- "Summary of Setting Up Localization" on page 387
- "Another Capability – Code Blocks" on page 387

Localization Overview

Summary

eSellerate provides the capability for publishers to localize their web stores for multiple languages (listed below). Once in the web store, customers choose their desired language from a pull-down menu that lists each language in its localized form—German appears as "Deutsch", for example. The text on new store layouts is localized in all supported languages. Publishers can customize most text and translations, or take them as they are, ready to go. Publishers also have the ability to localize their own product and web store elements, for things like SKU name and description, terms of sale, and store name. Localized web stores are available when using Custom or Standard Layouts that have been updated to support localization.

Scope

The scope of these localization capabilities extends only to customer-facing language. There have been no changes for publisher-facing language, which is in English only.

Supported Languages

The supported languages for localization are English, Spanish, French, German, Italian, Portuguese, Japanese, Chinese Simplified, and Chinese Traditional.

Other Localized Sites and Communications

In addition to web stores as previously noted, the customer-facing After-Purchase Services web site (http://store.esellerate.net/support) is localized. The entry page for this site is in English, but when customers log in to see their orders, the results are shown in the language used for the order.

E-mails sent to customers are localized in the language used for the order. Some examples of these e-mails are order confirmations and subscription renewal reminders.

More Details

- The base language of the eSellerate system is English. All text entered as part of the typical setup—such as filling out the SKU Detail tab—must be in English. For the items that are localizable, publishers can go to the Translation and Lexicon pages to enter non-English text as needed.
- Duplicating an item such as a SKU or an eSeller does not copy translations. Publishers will need to manually add translations after duplicating the items. This could involve copying and pasting within the Sales Manager, or working with exported Excel files.

Localization Steps for Publishers

Using Layouts That Support Localization

Before a web store can provide different language options, it needs to use the right layout.

Custom Layouts: Custom Layouts created prior to June 18, 2012, will not work with localization. Publishers wanting to support localization must create new layouts for that purpose, by starting with the current version of one of the following default layouts:

- Simple Responsive Layout
- Multi-Page Responsive Layout
- Simple Layout
- Multi-Page Layout
- Embedded Simple Layout
- Embedded Multi-Page Layout

Standard Layouts: Standard Layouts that existed prior to June 18, 2012, will not work with localization. Publishers wanting to support localization must choose one of two new localized layouts, which are:

- Simple, Responsive
- Multiple, Responsive

Optional Ways to Localize Custom Layouts

The only requirement for preparing Custom Layouts for localization is to start with a current template (one of the default layouts previously noted). When you start with a current template and localize strings by using the Lexicon and Translation features, your stores will have everything that they need to support localization. There is no need for extra steps, such as manually editing markup in regard to localization.

If you understand that the preceding approach is the most convenient, but you still want to directly mark up the HTML in your Custom Layouts, there are mechanisms that you can use to do that: string variables and language markup tags. String variables are a way to manage localized language, and language markup tags are a way to manage localized structure.

String Variables: These variables were added for localization, so that there are now three types: layout, ad hoc, and string. String variables have the form:

_String.*name*

where *name* is a standard identifier (begins with a letter, contains only letters, digits, or underscores). The value of the variable will vary according to the language selected at display time. Its various values are defined in either the Lexicon section or the Translations section of the Sales Manager.

Language Markup Tags: These tags have the form:

<_language.name>content</_language.name>

where name is the name of a selected language and content is well-enclosed Custom Layout content.

Inspecting Custom Layouts

Custom Layout inspection inspects the layout for each selected language. If the layout does not pass inspection for a certain language, that language will not be available in the web store.

Inspection passes with the *current state* of the lexicon. After you change the lexicon, you may want to go back to your Custom Layout—which would still be published, as you haven't made changes to it—and inspect it again to see if any warnings or errors come up as a result of your language updates.

Selecting Languages for Localization

Publishers specify the languages that they want to work with by making selections at two levels: the publisher level and the web store level.

To get to the Language Selection page at the publisher level, go to the Layouts section of the Sales Manager home page, and then click **Custom Layout Lexicon**. After the Lexicon page appears, click **Select Languages**.

The Language Selection page for a web store is accessible from an **Edit Language Selection** link at the bottom of the Web Store eSeller Detail page, and in the top ("General Attributes") section of the Embedded Web Store eSeller Summary page.

An example of the Language Selection page for a web store (regular or embedded) follows. By selecting options on the right side of the page, publishers can control when each selected language is available in the web store. Preview status makes the language available for testing, and Active status makes the language available for customers to choose when they visit the live store.

Warning: In regard to non-English languages: Do not turn on Active languages for stores that are not using localized layouts. The only time that you should set a non-English language to Active status is when the store is using a localized layout, and you have finished testing the language in your store.

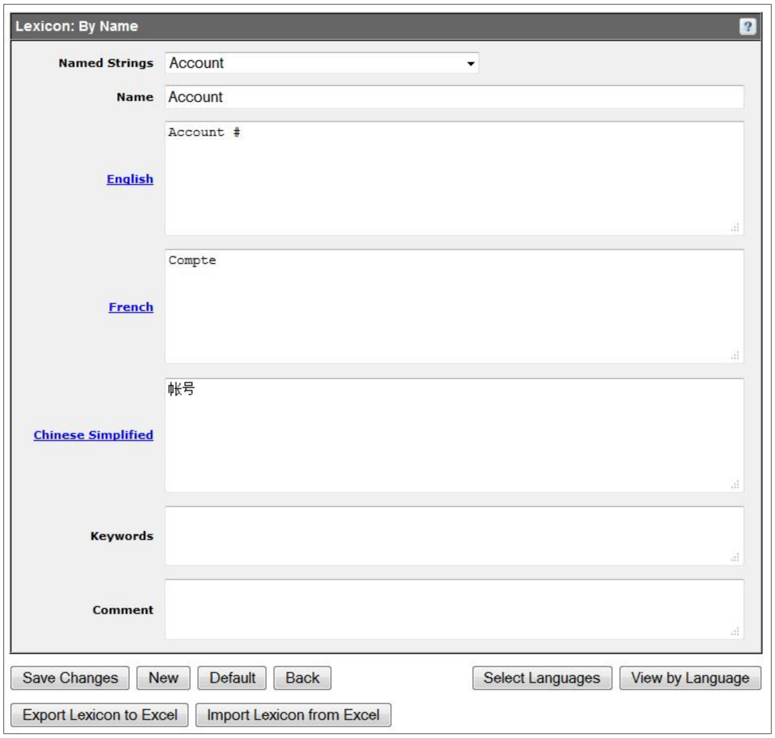
Differences between Translations and the Lexicon

Although both translations and the lexicon enable the localization of customer-facing language, they serve different functions within web store layouts. Translations have to do with the localization of Custom Layout variables, while the lexicon is for localizing text strings on the layout.

Localizing Layout Content (the Lexicon)

As previously mentioned, text on new store layouts is localized in all supported languages. Publishers can customize most text and translations, or take them as they are, ready to go.

Customization takes place on the Lexicon page, which is accessed by going to the Layouts section of the home page and clicking **Custom Layout Lexicon**. Publishers can view the lexicon by name or by language. At that point, they have the option to edit the strings one-by-one in the Sales Manager. Alternatively, they can export the lexicon to Excel for editing, and later import the modified Excel file. (Also see "Information for Translators" on page 387.)

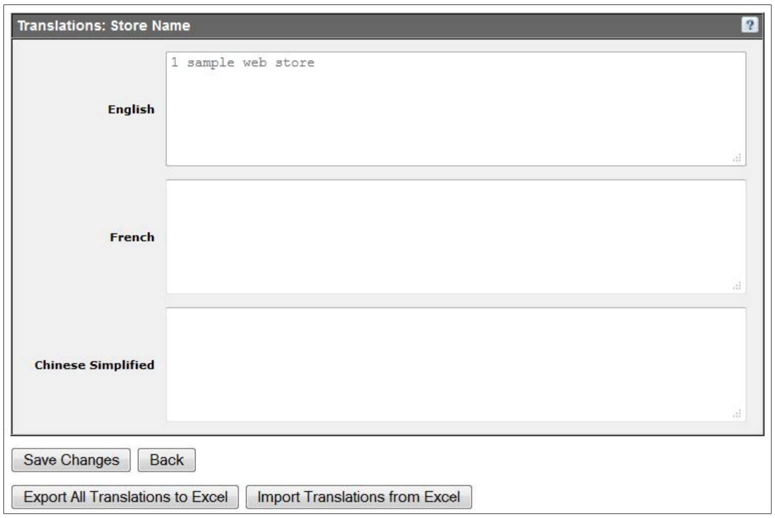


Notes

- Before you edit any of the default lexicon strings, please consider the following: Default lexicon strings will receive any updates that eSellerate pushes out for them, but overridden strings do not receive those updates. So, you can override a string or you can allow it to receive future updates, but not both.
- To add a named string to the lexicon, make sure the current view is by name, rather than by language. Then click **New**. Enter a name (which must have no spaces, begin with a letter, and contain only letters, digits, or underscores), fill out the other fields as needed, and then click **Save Changes**. To remove a named string that was manually added in this way, select it from the list of Named Strings, and then click **Delete**.
  - Before you add a named string, make sure that the name you've chosen for it is not already in use (regardless of case, because the names are case-insensitive). You will override existing data if you add a string name that is already present in the lexicon.
- Named strings in the lexicon can contain other named strings. For example, assume that the English text for "OrderConfirmation" is "Order Confirmation: _String.MyData". When web stores read in "OrderConfirmation" for English, they will also include the English text for the named string "MyData".
- Strings that are left blank will not show up for the corresponding language in the web store. For example, if the web store is showing Spanish, but the Spanish string for Address1 was left blank in the lexicon, then nothing will appear for Address1. (The stores don't drop back to English, or any other language, for strings that are left blank in the lexicon.)
- We recommend that you frequently back up the lexicon—ideally every time that you finish making significant changes. By exporting the lexicon to Excel and archiving the Excel files somewhere, you will have a way to easily restore your most recent work if data is ever lost.

Localizing Publisher Content (Translations)

Publishers have the option to localize customer-facing language that is specific to their own products and web stores. Localizable items are designated by a "Translate Data" icon in the Sales Manager. A few examples of these localizable items: SKU Name, Short Description (SKU setting), Store Name (eSeller setting), and Support URL (Receipt Information). Clicking **Translate Data** brings up the Translations page for the corresponding item. At that point, publishers have the option to edit the strings one-by-one in the Sales Manager. Alternatively, they can export all translations to Excel for editing, and later import the modified Excel file. (Also see "Information for Translators" on the facing page.)



Notes

- Non-English translations that are left blank will default to English. For example, if the web store is showing Spanish, but there is no Spanish translation for Store Name, then the English translation for that item will appear. (This assumes that an English translation exists.) To intentionally blank out a translation so that nothing shows up for it in the corresponding language, you can enter non-displaying content such as .
- We recommend that you frequently back up your translations—ideally every time that you finish making significant changes. By exporting the translations to Excel and archiving the Excel files somewhere, you will have a way to easily restore your most recent work if data is ever lost.

See Also

Defined eSellerate Variables – "Variables Notes" on page 284

"Ad Hoc Variables" on page 292

"Language Selection" on page 298

"Custom Layout Lexicon" on page 296

"Translations" on page 299

Information for Translators

Whether they're working with layout strings (an exported Lexicon file) or publisher strings (an exported Translations file), translators should note the following precautions:

- Translators will need Excel 2007 or newer to work with the exported files.
- Do not make changes to code or HTML markup. For example, do not change HTML special characters such as "&" or " " and do not change anything that is enclosed by { } or < >.
- Do not make changes to file names or paths. For example, do not change anything in this path: images/download.gif
- Do not change the names of spreadsheet columns. Also, reordering the columns can be problematic, so we recommend leaving them in their default places.
- In the Lexicon file, the only data changes that will be picked up on import are those made to the language columns (English, French, and so on).
- In the Translations file, the only data changes that will be picked up on import are those made to the non-English language columns (Spanish, French, and so on).
- It is possible to edit the English version of strings when working with the Lexicon file, but not the Translations file (because those edits will be ignored at import). With translations, any desired changes for English must be made in the Sales Manager.

Summary of Setting Up Localization

The main steps for setting up localization are:

1. Select the languages that you want to use for localizing your stores.
2. Select the languages that you want each store to support.
3. Assign the proper layouts to your stores. Two Standard Layouts are ready to use with localization right away. To prepare a Custom Layout for localization, you will need to start with one of the six default layouts that support this functionality.
4. Use the Translations feature to localize customer-facing language that is specific to your own products and web stores.
5. Make sure all the strings you wanted to localize have been filled out. This may involve any of the following:
    - Export your translations to Excel, and then look for empty fields in the Excel file.
    - If you added strings to the lexicon, export the lexicon to Excel, and then look through the Excel file to verify that you have filled out your new strings.
    - Set the languages in your stores to Preview status only. Then, for each language, verify that your translations are complete and showing up in the places you expected.
6. When you're ready to make the languages available in your stores, set the languages to Active status.

As a reminder, for a language to show up in a store, the following must happen:

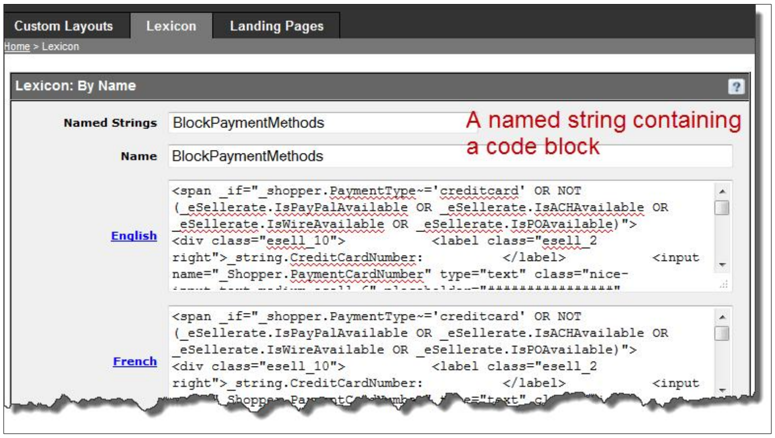
- The language must be turned on for the publisher.
- The language must be turned on for the store.
- The language must have passed inspection for the Custom Layout in use (does not apply when using Standard Layouts).

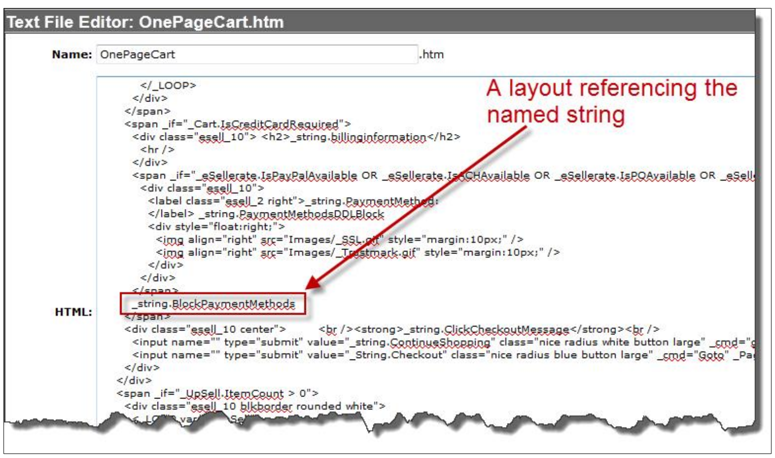
Another Capability – Code Blocks

In building out these localization features, we also added the capability of using code blocks in store layouts.

Strings in the lexicon can be as straightforward as a single word representing the Spanish translation for "Save", for instance. But for more advanced needs, they also can contain elements such as code blocks. For example, our localized responsive layouts use code blocks to handle payment methods. When we need to add payment methods or modify existing ones, we can push out the changes to those code blocks at any time, and your web stores will dynamically receive the updates, with no effort required on your part.

The following illustrations are examples of how you can use a named string to hold a code block, and include the code block in your layout by referencing the string.





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