NODUS Technologies, Inc.

eStore Solution Stack User's Guide

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Microsoft GOLD CERTIFIED Partner | ISV/Software Solutions
Business Process and Integration

Revision History

Author	Date	Version	Changes	Approved	Date
Frank Messina	6/27/11	4.0	Added revision history	FM	6/27/11
Jim Ma	3/11/12	4.0.1	Added new features - Section 3.7.4: Anonymous Checkout - Section 3.9.23: Login Anywhere - Section 3.9.24: Mobile Ready - Section 4.6.1.2.8: Social Network Plugins - Section 4.9.1: Screenshot - Section 4.9.1: Site Options - Enable Login Anywhere - Section 4.9.1: Site Options - Facebook URL for Like Box Social Plugin - Section 4.9.1: Site Options - Mobile Website URL - Section 4.9.9: Order Options - Screenshot - Section 4.9.9: Order Options - Enable Anonymous Checkout - Section 4.9.9: Order Options - Anonymous Customer ID - Section 4.9.9: Order Options - Anonymous Customer Address ID	NN	3/30/12
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Jim Ma	7/2/12	4.0.1	Rewrote Section 4.6.1, 4.6.2, and 4.6.3. Inserted 4.6.4 for Content Blocks.	JM	7/2/12

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1. Introduction

For many companies, eCommerce can be a complex and difficult undertaking. Nodus eStore Solution Stack (eSSS) is an end-to-end eCommerce solution for Microsoft Dynamics GP merchants that will automate the complexity and streamline the transactions. Nodus eStore Advantage and Credit Card Advantage are also components, for integration and payment processing respectively.

This introduction section covers the following:

- New Features in eSSS
- Additional Resources

The next section, Feature List, is a feature-driven content list. The Feature List offers a look-up view of individual eSSS features and provides clickable links to the detailed instructions on Section 3, the administrative area of this document. This is useful for setting up a particular feature, and the section will provide the pointers to where they can be set up.

Section 3, the administration area, reviews the detailed instructions for each administrative setting page. It serves as an easy-to-look up tool when instructions are needed regarding functionalities on a particular page. Breadcrumb-style navigation on each heading directs the user to the correct page on the administration area for each functionality.

1.1. New Features in eSSS

Several features have been added to this release for eSSS. These features are outlined in the accompanying table.

NEW FEATURE	DESCRIPTION
Anonymous Checkout	Allow customer to submit an order without registering for an account.
Social Network Plugins	Click and add Twitter button, Facebook Like Button, and/or Facebook Like Box to the homepage, category pages, and/or product detail pages.
Application Programming Interface (API)	API is made available for developers to integrate with eSSS, such as building a separate mobile version of the site.
Category Properties: Custom links to support all URIs	In addition to HTTP: and HTTPS:, the Custom Links on Category properties now supports all URIs, such as "mailto:"
Shipping Origin	Origin of shipping calculation was based on the store address, and has been changed to use the "Default Order Site ID". This will also require the Site ID information to be imported from GP. Make sure the "Default Order Site ID" is configured under **Settings → Nodus/Great Plains**, and click the **Run Now** button next to it to import the Site ID information (site address).
Login Anywhere	User now can login to the eCommerce website on any page of the shopping cart. User no longer has to go to the login.aspx page in order to login.

1.2. Additional Resources

This Desktop Reference Guide gives you information you need on how to use the application. If you are still having trouble, there are support options. Contact the reseller or call Nodus Technologies to purchase support packages.

CONTACT METHOD	CONTACT INFORMATION
E-mail	support@nodus.com
Website	http://www.nodus .com

Telephone	(909) 482-4701
Fax	(909) 482-4705
Mail	2099 S. State College Suite 250 Anaheim, California 92806

2. Installation

Instructions regarding the components needed to install eStore Solution Stack are detailed in the **eSSS Installation Guide**. Please contact Nodus Technical Care for this manual.

3. Feature List

This section is designed to be a feature guide for the site administrator and other users. The list helps quickly access eSSS settings by displaying the feature, a short description, and then providing a link to where the feature is located in the administration section of this user's guide. Product details and configuration instructions are explained in the administration section.

The main features are categorized are as follows:

- **Integration**
- **Product Catalog**
- **Store Presentation**
- **Shipping/Freight**
- **Taxes**
- **Payment Methods**
- **Customer Record Management**
- **National Account Support**
- **Shopping Cart Functionality**
- **Single Sign-on**
- **Troubleshooting**

3.1. Integration

This section covers how data is set up and integrated between MS Dynamics Great Plains and eSSS.

3.1.1. Setup

3.1.1.1. GP Pricelist Setup

Use this option to specify how pricing is configured in GP, so the item pricing can be imported correctly.

Link to detailed instructions

3.1.1.2. Customer Import Options

This set of options controls the customer information used for integration of the shopping cart.

Link to detailed instructions

3.1.1.3. Order Options

This section lists the processing options available for order items on the website. Among the options available are quantity settings, special instructions, and shipping and sales configuration.

Link to detailed instructions

3.1.1.4. Item Import Options

This section lists the options specific to the item import.

Link to detailed instructions

3.1.2. Record Synchronization

Record synchronization is normally done through the Nodus Synchronizer tool. However, the ability to import records manually from eSSS is also built into the eSSS admin site. The following sections discuss how to perform the record synchronization and importation as well as managing the information sent back to GP.

3.1.2.1. Nodus Synchronizer

Starting when eSSS is installed, the Nodus Synchronizer automatically moves data back and forth between GP and the website. Set up information for the Nodus Synchronizer is

Refer to the Nodus Synchronizer section of the eSSS Installation

located in the eSSS Installation Guide. Guide for more details

3.1.2.2. Manual Customer Record Import

Customer records are individually imported from GP using this tool. Link to detailed instructions

3.1.2.3. Manual Item Record Import

Product items can be individually imported from GP using this tool. Link to detailed instructions

3.1.2.4. Manual Tax Detail Import

Tax Detail records and its association with Tax Schedules can be manually imported from GP using this tool. Link to detailed instructions

3.1.2.5. Manual Site Information Import

Site information including address information can be manually imported from GP using this tool. Link to detailed instructions

3.1.2.6. Order Manager

The Order Manager provides order status at-a-glance and allows you to resubmit orders that failed to integrate into GP. Link to detailed instructions

3.1.2.7. Customer Information

This page lists customer records that failed to integrate into GP and provides the ability to adjust the record and resubmit into GP. Link to detailed instructions

3.2. Product Catalog

3.2.1. General Product Properties

This page allows product properties from item images to inventory to be configured.	Link to detailed instructions

3.2.2. Categories

3.2.2.1. Category Properties

Creating/editing a category along with tools for building and changing the category structure – how the categories are presented on the website – are available in this location.	Link to detailed instructions
Category properties such as meta tags and category content can be created and edited here.	Link to detailed instructions
Configuration for the category search tool and other category options are available in this location.	Link to detailed instructions

3.2.3. Product Images

3.2.3.1. Product Image Options

Configure the product images that will fit the layout of the site.	Link to detailed instructions

3.2.3.2. Specify Image Paths

Associate product images to products on the website.	Link to detailed instructions

3.2.3.3. Automatically Determine Image Paths by File Name

By using auto recognition of files through naming conventions, this feature eliminates the need to manually associate image paths with products. However, it can be overridden with the path manually specified.	Link to detailed instructions

3.2.4. Product Pricing

3.2.4.1. GP Pricelist and Promotion Price Sheet Setup Options

GP Price List Settings, which can be enabled or disabled, displays the pricing offered for each item based on customer preference — Link to detailed instructions

Promotion Price Sheet Settings enables accepting, rejecting or accepting with conditions. — Link to detailed instructions

3.2.4.2. Edit Product > General Info

Category properties such as site cost, list cost and site price are created and edited here. — Link to detailed instructions

3.2.4.3. Edit Product > Volume Discounts

Volume discounts for items for website customers. — Link to detailed instructions

3.2.5. Item Inventory

3.2.5.1. Standard/Single Distribution Site Inventory

This is where settings for a standard site inventory using a single distribution location can be found in the admin section under Global Inventory Settings. — Link to detailed instructions

The **Allow Back Orders** option in GP setting is located in the **Item Imports** section — Link to detailed instructions

Optionally, additional inventory settings on the product item level can be found in the Products section — Link to detailed instructions

3.2.5.2. Multi-Distribution Site Inventory (optional module)

The Multi-Distribution feature allows inventory to be selected by site location. — Link to detailed instructions

Other settings for multi-site inventory are located in the Global Inventory Settings section — Link to detailed instructions

The **Allow Back Orders** option in GP setting is located in the **Item Imports** section

Link to detailed instructions

Optionally, additional settings on the item level can be found in the **Products** section

Link to detailed instructions

Site groups for customers that allow inventory to be chosen from different locations can be set up in the Customer Specific Site section

Link to detailed instructions

3.2.6. Promotions

3.2.6.1. Sales

Two types of sales can be set up here; storewide sales and sales for individual product items.

Link to detailed instructions

3.2.6.2. Discounts

Sets product item discounts by order, product, shipping, product shipping, and for free product shipping

Link to detailed instructions

3.2.7. Related Items

3.2.7.1. Edit Product > Related Items

Enables Related Items to be displayed when a customer is viewing a product.

Link to detailed instructions

3.2.8. Customer Choices

3.2.8.1. Customer Choices

Allows the customer to choose from a list of product options, such as color and size.

Link to detailed instructions

3.2.9. Digital Goods File Downloads

3.2.9.1. Digital Goods File Downloads

This feature gives the option of selling downloads for eligible products like digital books or music.

Link to detailed instructions

3.2.10. Purchase Restrictions

3.2.10.1. General Purchase Restrictions

These purchase restrictions control s minimum and maximum amount and quantities of an item that can be purchased on the website. Link to detailed instructions

To implement price restrictions for a product item: Link to detailed instructions

3.2.10.2. Customer Specific Catalog (optional module)

Enables a catalog of products to be established for specific customers. Link to detailed instructions

3.3. Store Presentation

3.3.1. Themes

Enables a new color theme to be selected for the website — Link to detailed instructions

3.3.2. Site Terms

Allows site values (terms) to be customized — Link to detailed instructions

3.3.3. Resource Messages

Allows eSSS resource file access. — Link to detailed instructions

3.3.4. Quick Order Entry

This section sets up quick order entry suggestions for the eSSS home page. — Link to detailed instructions

3.3.5. Home Page Layout

Allows modular design of the home page using text and graphics as well as user controls such as a search box tool. — Link to detailed instructions

3.3.6. Category Page Layout

Similar to the home page, category pages can be designed from this location on the administration site. — Link to the Admin section

Display options such as showing products in column grid or detail list can be accessed in this location. — Link to detailed instructions

Settings for search functionality in the category section can be accessed in the Category and Search location, along with additional category options. — Link to detailed instructions

3.3.7. Store Information

Sets up basic store information such as location and sales id [Link to detailed instructions]

3.3.8. Store Logo

Allows a custom store logo to be loaded. [Link to detailed instructions]

3.3.9. Multiple Language Support

Multi-lingual support enables most languages to be displayed on the eSSS store website. Once implemented, several different languages can be changed on-the-fly through a language options droplist located on the header of each page on the website. Other features include:

- In addition to the static text on the page and action buttons, conditional pop-up messages will also be displayed in the chosen language.
- Multiple eSSS sites can be created for additional languages
- Content management through exporting data via uploadable template spreadsheets. Updates are accomplished through additional spreadsheet downloads. The spreadsheets contain product information including data such as description, images, metadata, item number and category or categories.

To enable the eSSS language feature use the instructions in the following sections.

3.3.9.1. Download the Content Spreadsheet

Once the products to be downloaded to the website are identified, the first step is to update item descriptions to the desired language. For this purpose, the Item Updater helps update item properties on the website.

1. Navigate to **Catalog** > **Item Updater**
2. Choose export options
3. Click **Export**
4. Download and save the spreadsheet file
5. Follow the normal import process. In the products file, make any needed changes
6. Save the file to a local drive
7. Browse and the file and click **Import**

Figure 3-1 Item Updater

3.3.9.2. Change to Import Option Settings

1. Navigate to **Settings** > **Nodus/Great Plains**
2. Navigate to the **Item Import Options** settings section
3. Unmark the checkbox to disable the following settings:
    - **Update Item Name on Re-import**
    - **Update Short Description on Re-Import**
    - **Update Long Description on Re-import**
    - **Copy Short Desc to Long Desc if Long Desc is empty upon import**
4. Return to the Item Updater
5. Change the item description in spreadsheet to the desired new language
6. Use the updater to import the spreadsheet to eSSS

3.3.9.3. Change Site Terms

1. Navigate to **Settings** > **Site Terms**
2. Update ALL site values. To do this:
3. For each displayed site term click the **Edit** button
4. Change the value by translating the term to the new language
5. Click the **Update** button
6. Repeat for all site terms

3.3.9.4. Update System Messages

1. Open the App_LocalResources folder
2. Edit the local resource files
3. Use the text editor to translate the content to the new language
4. Look for the values for each data name

3.3.9.5. Update Theme

Make sure new images are created for buttons and other images with text that needs to be translated to the new language. Once the new images have been created, add the new contents to the App_Themes folder.

3.4. Shipping/Freight

3.4.1. Matrix Freight Table

This table displays the shipping methods that have been set up for the website. Setup method setup information is included.

Link to detailed instructions

3.4.2. Real-time Shipping Calculation

Setup for calculating shipping fees in real-time for major shippers such as UPS, FedEx and USPS.

Link to detailed instructions

3.4.3. Other Shipping Configurations

3.4.3.1. Shipping Policy

Enables entry of the store shipping policy for display on the website.

Link to detailed instructions

3.4.3.2. Shipping Options for Individual Items

Configuring shipping options for specific items can be carried out in this location.

Link to detailed instructions

3.5. Taxes

Tax information can be either handled by GP or through one of the tax data services listed below that is supported by eSSS. This third party software communicates directly to eSSS and supplies the tax during the check out process.

Except for certain usability options, most configuration information is gathered from the third party firm and entered into a setup form in the eSSS administration section.

3.5.1. Standard GP Tax

This section lists the processing options available for order items on the website. Among the options available are quantity settings, special instructions, and shipping and sales configuration.

Link to detailed instructions

3.5.2. Avalara AvaTax

This is where required information for setting up Avalara tax service information is located.

Link to detailed instructions

3.5.3. Sabrix Managed Tax Service

This is where required information for setting up Sabrix Managed Tax Service information is located.

Link to detailed instructions

3.5.4. CCH Sales Tax Office

This is where required information for setting up CCH - STO tax service information is located.

Link to detailed instructions

3.6. Payment Methods

3.6.1. Credit Cards and eChecks

3.6.1.1. General Setup

This section is required for credit cards and eChecks to be used on the website.

Link to detailed instructions

3.6.1.2. Credit Card Wallet

Although credit cards are not stored directly in eSSS, cards can be saved for later use by enabling a setting that will store them in GP.

Link to detailed instructions

Credit Card information can also be viewed in the following location on the store website: **Your Account** > **Credit Card Maintenance**

3.6.1.3. Tokenization (optional module)

Tokenization is a simplified method for providing credit card security, requiring less hardware. With tokenization, credit card information is sent to the payment gateway, where the gateway issues a token. This token is returned to eSSS and saved to the CCA wallet so it can be used for future transactions with the associated credit card.

To configure Tokenization:

1. Payment Gateway account information should be configured with Setup IDs, including the flag to utilize Tokenization. Refer to the **eSSS Installation Guide** for Setup ID configurations.
2. Once the Setup ID is configured, the Admin should then navigate to the following location on the admin website:
3. **Settings** > **Payment**s > (Select CC & eCheck Processor) > (Edit Nodus Transaction Server)
4. Choose the desired Setup ID that holds the Payment Gateway account to be used for processing credit cards

NOTE: Tokenization is an optional module, and is controlled by a Nodus product registration key. Only when the proper product registration key is in place, will the administrator be able to select Tokenization enabled Setup IDs.

3.6.2. PayPal

This section covers how to setup and configure PayPal for use as a payment type during website check out.

Link to detailed instructions

3.6.3. Other Payment Methods

These payment types include:

Link to detailed instructions

- Purchase Order
- Telephone
- Fax
- Email
- Check by Mail
- On Account

3.7. Customer Record Management

3.7.1. CSR/Salesperson Functionality

CSR and Salesperson functionality is set up from this location. Functionalities include setting up the ability to log onto the site and place orders on behalf of the customer. These settings can also restrict a salesperson from managing accounts not assigned to the Sales ID.

Link to detailed instructions

3.7.2. Customer Record Management

Customer information can be viewed and managed from this location using the Edit User form.

Link to detailed instructions

3.7.3. My Account Options

The location of account settings such as e-mail address, password, single sign-on for ePay options and multiple user log-ins.

Link to detailed instructions

3.7.4. Anonymous Checkout

Allows customer to place order without registering for an account. All orders placed using anonymous checkout will are sent to GP under one single customer record.

Link to detailed instructions

3.8. National Account Support

3.8.1. National Account Settings

National Account settings can be configured from this location. [Link to detailed instructions]

3.8.2. Workflow

This National Account page allows the user to view and choose from a list of accounts associated with the primary account. Functions available from this page include:

- The address book of the selected account that is used during checkout
- The order is sent to GP under the account's GP Customer ID
- When a parent account places an order on behalf of the child account, confirming e-mails are sent to both accounts.

Figure 3-2 National Account page

When this feature is enabled and a parent-child account relationship is established in Great Plains, the initial log-in page will open to the National Account selection page as shown above. The user then chooses the account to be worked with by marking the checkbox and clicking the **Select** button.

Browsing to pages other than the Customer Service section is not allowed. The customer is required to select an account before any other actions can be taken.

3.9. Shopping Cart Functionality

3.9.1. Gift Certificates

Enables the ability to purchase and redeem electronic gift certificates on the website.

Link to detailed instructions

3.9.2. Mailing Lists

Customer private and public mailings can be created in this location.

Link to detailed instructions

3.9.3. Affiliates

Sets up an affiliate referral program, if desired.

Link to detailed instructions

3.9.4. Drop Ship

Drop ship e-mail notices can be enabled from the following location on the administration site. This settings will send notices for both the authorization and charge stages of the order

Link to detailed instructions

3.9.5. Search Engine Optimization

3.9.5.1. Edit Product > Meta Tags

This is where meta tags are entered for website product items. The following meta data types are allowed:

Link to detailed instructions

- Meta Title
- Meta Keywords
- Meta Description

3.9.5.2. Edit Category > Meta Tags

Meta tags can be added when a category is created or edited from this location.

Link to detailed instructions

3.9.5.3. Store Meta Tags

Store-level meta tags can be added from this location. Link to detailed instructions

3.9.5.4. URL Re-write

Allows the user to choose between ProductID and ProductName to re-write the URL when needed. Link to detailed instructions

3.9.6. Help/FAQ

The Help/FAQ page for the website is created and edited from t6his location. Link to detailed instructions

3.9.7. Privacy Policy

The website privacy policy can be created or edited from this location. Link to detailed instructions

3.9.8. Returns

Enables creation of a product Return form for use by website customers. Link to detailed instructions

3.9.9. Site Terms and Conditions

Allows site values (terms) to be customized. Link to detailed instructions

3.9.10. E-mail Messages

3.9.10.1.Settings > Mail Server

This is where SMTP mail server is specified to enable site e-mail. Link to detailed instructions

3.9.10.2.E-Mail Messages

E-mail templates are available to facilitate several different types of e-mail notices such as forgotten passwords, new orders and drop shipments. Link to detailed instructions

3.9.11. Custom Pages

New web pages can be added to the store using this tool. Link to detailed instructions

3.9.12. Open/Close Store

I f it is necessary to shut down the website for system upgrades or other reasons, this option posts a notice informing customers of the website status. Link to detailed instructions

3.9.13. Google Analytics

Allows script procedure from Google to be added in order to enable Google Analytics, a tool that allows analysis of traffic on the website. Link to detailed instructions

3.9.14. reCAPTCHA

Enables reCAPTCHA, an anti-spam feature. Link to detailed instructions

3.9.15. Search Orders

This is search feature that allows website orders to be filtered and searched to create a custom list of orders Link to detailed instructions

3.9.16. Reports

Displays a variety of customer, sales and product reports, including: Link to detailed instructions

- Monthly Sales
- Daily Sales
- Sales By Coupon
- Sales By Affiliate
- Top Products
- Top Customers
- Website Payments Pro Payflow Edition Reporting

3.9.17. Gift Wrap

This option enables item gift wrapping to be ordered by the customer. [Link to detailed instructions]

3.9.18. Site Options

A variety of global settings for the site are configured from this location. Major settings include: [Link to detailed instructions]

- Currency display
- Initial Landing page
- Site cookie name
- National Account support

3.9.19. Region Control

3.9.19.1. Currency

Sets the website default currency. [Link to detailed instructions]

3.9.19.2. Countries

List countries from where orders can be accepted. [Link to detailed instructions]

3.9.20. Product Reviews

These settings will set up and maintain a product review feature for each product item that allows customers to rate products available on the website. [Link to detailed instructions]

3.9.21. Fraud Checks

Provides the option of banning e-mails, IP addresses and domain names for customers who pass bad checks or behave in an inappropriate manner. [Link to detailed instructions]

3.9.22. Repeat Order

There is no administrative control to enable or disable this feature, which is available from the **Order History** page on the website. Once a previous order is opened from the history list, the **Repeat Order** button is available.

Clicking **Repeat Order** loads data from the original order onto a new checkout page. From there, the user can add and delete items as needed and complete the checkout process.

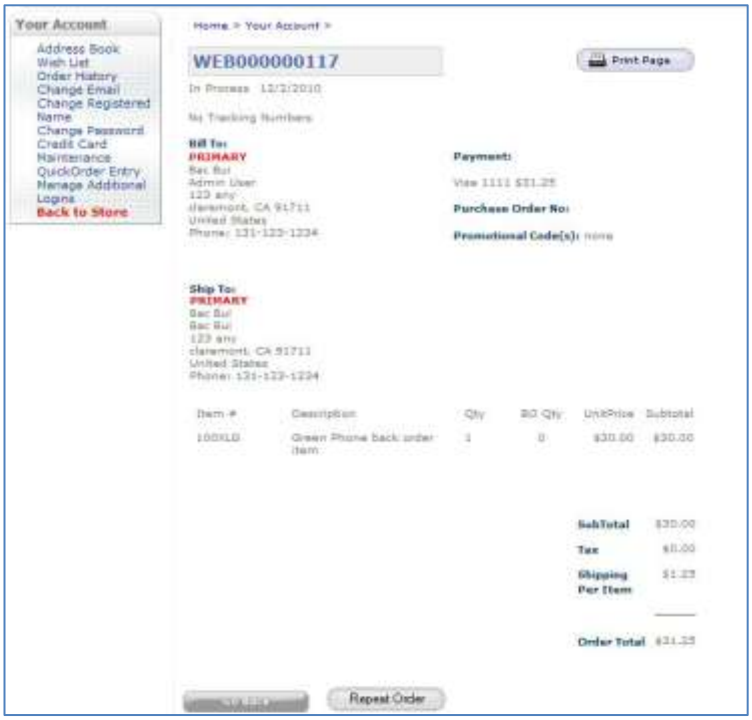


Figure 3-3 Repeat Order

3.9.23. Login Anywhere

Login Anywhere provides on-screen prompt for the customer to enter their credentials anywhere on the site when clicking "Sign In", without leaving the page they were viewing.

Link to detailed instructions

3.9.24. Mobile Ready

eSSS provides Application Program Interface (API) for your mobile site developers to integrate eSSS data and functionalities with your

Link to detailed instructions

mobile site. eSSS will also detect when users are browsing using a mobile device and redirect the user to your mobile site. Please see the eSSS API Developer Guide for technical details.

3.10. Single Sign-On

eSSS supports single sign-on, which will allow a third party application/website to authenticate the users and handle the logins, then redirect the user back eSSS with pre-established session under the user's account.

The third party application/website will need to be customized to handle such communications with eSSS. For the technical details, please refer to the eSSS SSO Developer Guide.

3.11. Troubleshooting

3.10.1. Version Information

This list of file names and file versions helps identify the source of problems to Nodus.

Link to detailed instructions

3.10.2. Error Log

Error log management system built into eSSS

Link to detailed instructions

3.10.3. Current Application Settings

Read-only list of store settings.

Link to detailed instructions

3.10.4. Debug Logs

Aids in troubleshooting website error issues by accessing a debug log table.

Link to detailed instructions

4. Administration Areas

4.1. Home Page

*Administration website location: **Home***

To access the Merchant Admin area, navigate to the site and click the Sign-In link on the top menu. If logging in with an account with permissions to access the admin area, the Go To Admin button appears as shown.

NOTE: If the Go To Admin button does not appear due to theme customizations, etc., log-in to the Admin area by going to the root domain URL/BVAdmin/Default.aspx. When first viewing the Administration home page, the content appears as shown in the accompanying figure.

Figure 4-1 Admin Home Page

4.2. To Do/Alerts

Administration website location: ***Home*** *>* ***To Do/Alerts***

Critical information will be listed in this section for immediate action. When creating a new site – as demonstrated in the above home page screen shot – information such as the default log-in credentials should be changed and content added to the new store such as Categories and Products.

The accompanying screenshot is an example of the To Do/Alerts list.

Figure 4-2 To Do/Alerts

4.3. Resources

Administration website location: ***Home*** *>* ***Resources***

Several helpful resources are also available on the Administration home page. The links to these resources are described in the following table.

NEW FEATURE	DESCRIPTION
Getting Started Checklist	Opens a pop-up window with a series of links that guides the user through the process of setting up the most critical webstore features.
Nodus.com	This is a link to Nodus Technologies' main website.
Nodus Support	This link connects directly to the Support Center page of the Nodus main website.
Nodus Knowledge Base	This link connects directly to the Knowledge Base page of the Nodus main website.
eSSS User's Guide	Opens a window where a PDF can be downloaded...

4.3.1. Getting Started Checklist

The first steps in setting up the new eStore are listed in the Getting Started Checklist. These are the most critical items needed to set up the store. This process involves setting important settings such as:

- Administrator account user name and password
- Contact and business information
- Payment and shipping options
- Store product catalog

Webstore display can be configured using the included home page content builder and other HTML editors such as Microsoft FrontPage, Macromedia Dreamweaver and MS Visual Studio.

The Getting Started Checklist organizes the critical elements to configuring the new store. Follow this desktop reference to ensure the default settings for the webstore are configured prior to going live with the store.

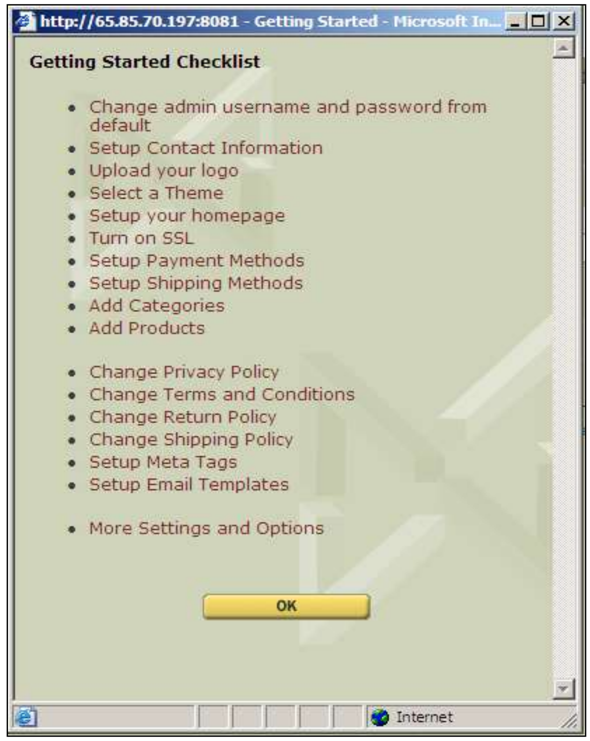


Figure 4-3 Getting Started Checklist

NOTE: this portion of the reference is meant to be an overview of the critical set-up steps. You must refer to specific topics noted in each section for the most complete content. Links to this content in the **eSSS User's Guide** are provided in the following sections.

4.3.1.1. Change Admin User Name and Password from Default

When building a new store, the default log-in credentials are '**admin@nodus.com'** and '**password'**. These are the default credentials for all eStore Solution Stack stores.

1. Click the link in this first checklist item and the accompanying figure appears.
2. Enter a default admin e-mail address for the website, then a new password.
3. Confirm the password

   NOTE: It is highly recommended to use a 'strong' password containing upper and lower case letters, numbers, and at least one special character such as those in the upper case number keys. Password length should be at least six characters in length.

4. Click the **OK** button

Figure 4-4 Change Default Admin Username

4.3.1.2. Set-up Contact Information

Personalize the site with information specific to the webstore. This information is displayed as a link in the Customer Service area of the store in the window footer. Link to detailed instructions

4.3.1.3. Upload Logo

This section describes how to set up a logo image is displayed on the eStore home page. Link to detailed instructions

4.3.1.4. Select a Theme

Nodus eStore Solution Stack ships with several themes that can be selected in the administration section. Link to detailed instructions

4.3.1.5. Set-up Home Page

The home page can be easily customized using the home page content editor.

Link to detailed instructions

4.3.1.6. Turn on SSL

This describes how to set up SSL for the webstore.

Link to detailed instructions

4.3.1.7. Setup Payment Methods

Nodus eStore Solution Stack offers several methods of handling payments. These payment methods are set up in the following locations.

Credit Card and Check Processing — Link to detailed instructions

Set up PayPal — Link to detailed instructions

Other Forms of Payment — Link to detailed instructions

- Purchase Order
- Telephone
- Fax
- E-mail
- Check by E-mail
- On Account

4.3.1.8. Setup Shipping Methods

If shippable products are provided, this section describes how to configure the shipping options.

Link to detailed instructions

4.3.1.9. Add Categories

The main focus of the store is the content for sale. This section shows how to organize content (products) in categories and sub-categories.

Link to detailed instructions

4.3.1.10. Add Products

4.3.1.10.1. Extended Great Plains/Myridas Pricing

Extended Pricing is a Great Plains feature that allows special conditions to be set for pricing items, such as establishing a percentage discount and date range for a President's Day sale. Myridas is a similar add-on program with specialized features.

Link to detailed instructions

4.3.1.10.2. Import and Edit Products

This is a tool that can import a single product item from GP. The entire item set is automatically imported to eSSS by the Nodus Synchronizer after installation, but there occasionally be a need to import a single item.

Link to detailed instructions

4.3.1.11. Privacy Policies

Prior to going live, customize policy information to meet your on-line business requirements.

Link to detailed instructions

4.3.1.12. Change Terms and Conditions

The rules of the website are displayed in the webstore's Terms and Conditions area of the Customer Service page.

Link to detailed instructions

4.3.1.13. Change Return Policy

This area of the website establishes the webstore policies for accepting returns.

Link to detailed instructions

4.3.1.14. Change Shipping Policy

Text for the established shipping policy of the website can be created or edited in this section.

Link to detailed instructions

4.3.1.15. Setup Meta Tags

Each product can contain Meta tags such as Title, Keywords, and Description, as well as Meta tags at the store level. This provides excellent control and customization for search engine optimization.

Link to detailed instructions

4.3.1.16. Setup Email Templates

There are several e-mail templates available that can be customized as needed. This section allows the templates to be customized as needed.

Link to detailed instructions

4.3.1.17. More Settings and Options

This link takes the user to the Settings section where most configurable options for the website are available. For details on these features, refer to the **Settings** section of this user's guide.

4.4. Catalog

Products are the core of any store. Prior to creating products, it is important to have good understanding of all related areas in the admin area that contribute to the presentation and sale of your business products. Familiarize yourself with the available fields and features involved in product creation and other lists that need to be populated prior to creating products. Prior to creating products, it is recommended to build the category structure of the store.

Careful planning is a key to minimizing excessive categories and complicated navigation for shoppers. After organizing the categories, configure the manufacturers and vendors associated with inventory. New products are assigned a Product Type. Once created, they cannot be changed, so it is imperative to configure product types prior to building new products. A product type is essentially a 'description template' that contains information describing the product. These elements of the product type template are called properties, which can be configured by clicking the Type Properties menu option.

Configurable options in the Catalog section include:

- Products
- Catalogs
- Categories
- Shared Choices
- Sales
- Discounts
- Update Inventory
- Product Types
- Type Properties
- Manage Files
- Quick Order Product Suggestions
- Item Updater
- Customer Specific Site

4.4.1. Categories

Administration website location: ***Catalog*** *>* ***Categories***

The main focus of most stores is the content for sale. Content should be organized into well-considered categories. However, careful use of categories should be exercised so they don't clutter the store. Each category contains products. Categories can have nested sub-categories for further organization. Here, Item Classes can be imported from Great Plains. This is useful if the items are already laid out in a logical way in Great Plains and it is desired to maintain the Item Class layout for shopping cart categories.

NOTE: It is advised to import the Item Classes before importing the Items. Updating (re-importing) previously imported items does not update them with new category information.

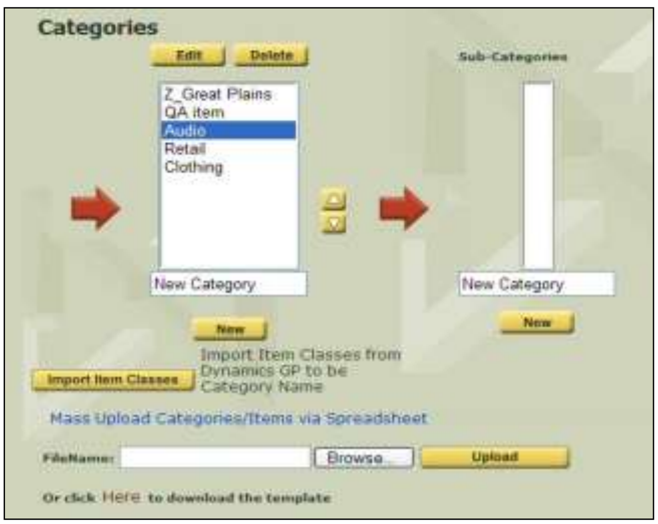


Figure 4-5 Add Categories

The skeleton of any store is comprised of categories or "groups." Each category group contains products and/or sub-categories assignments. When a category is viewed, the products you associated with the group are displayed to the shopper as well as any sub-categories. Prior to building categories, carefully plan the site to let a shopper easily know where to find the product they are looking for.

Category organization suggestions:

- Write out a category and sub-category structure outline prior to adding them to the store so the store design is well thought out prior to implementation.
- Make sure any category names are named properly and provide the proper detail as to what the category contains.

- Break down each category "group" into sub-categories and associate the products to the sub-categories as well.
- Another option is to **NOT** associate products to a parent category, only sub-categories.
- Another alternative: organize categories in the website. Top sellers could be associated to a parent category only, and the remaining products could be associated with sub-categories.
  Caution: Do not overuse categories.

Building a clear, well-considered category structure is critical to shoppers finding what they need as well as guiding them to other areas of interest during their shopping experience.

NOTE: When imported, GP Item Classes only create parent categories.

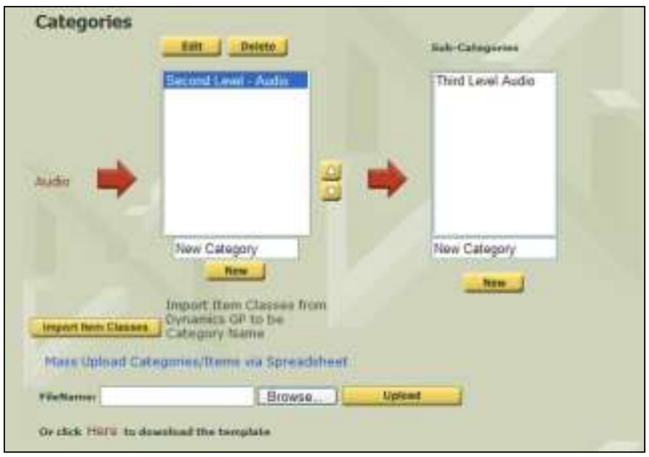


Figure 4-6 Loading Parent Categories

The parent categories are loaded as shown in the following figure, and then selecting one of the parent categories displays the assigned sub-categories.

Figure 4-7 New Parent Groups

4.4.1.1. Add a New Parent Group

1. Enter the name of the new category in the left window under the New Category heading
2. After entering the name, click the **New** button. The name appears in the right window

4.4.1.2. Delete Category

Select the category and click the **Delete** button

4.4.1.3. Add Sub-Categories

Select a parent category in the left window then replace "New Category" on the right side list with the name of the desired sub-category.

4.4.1.4. Additional Level of Sub-Category

Click the sub-category on the right-side list that will be the parent of the next level of sub-categories. Upon doing so, as shown in the accompanying figure, the selected sub-category is loaded into the list on the left and sub-categories can be defined in the list on the right

Figure 4-8 Additional Level Sub-Category

4.4.1.5. Edit Category

*Administration website location: **Catalog** > **Categories** > (choose a category and edit) > **Edit Category***

Categories can have unique features such as meta tags, image assignments, product assignments, and control of how category content is displayed. The following figure shows the top portion of the Edit Category area allowing the definition of the category name and description.

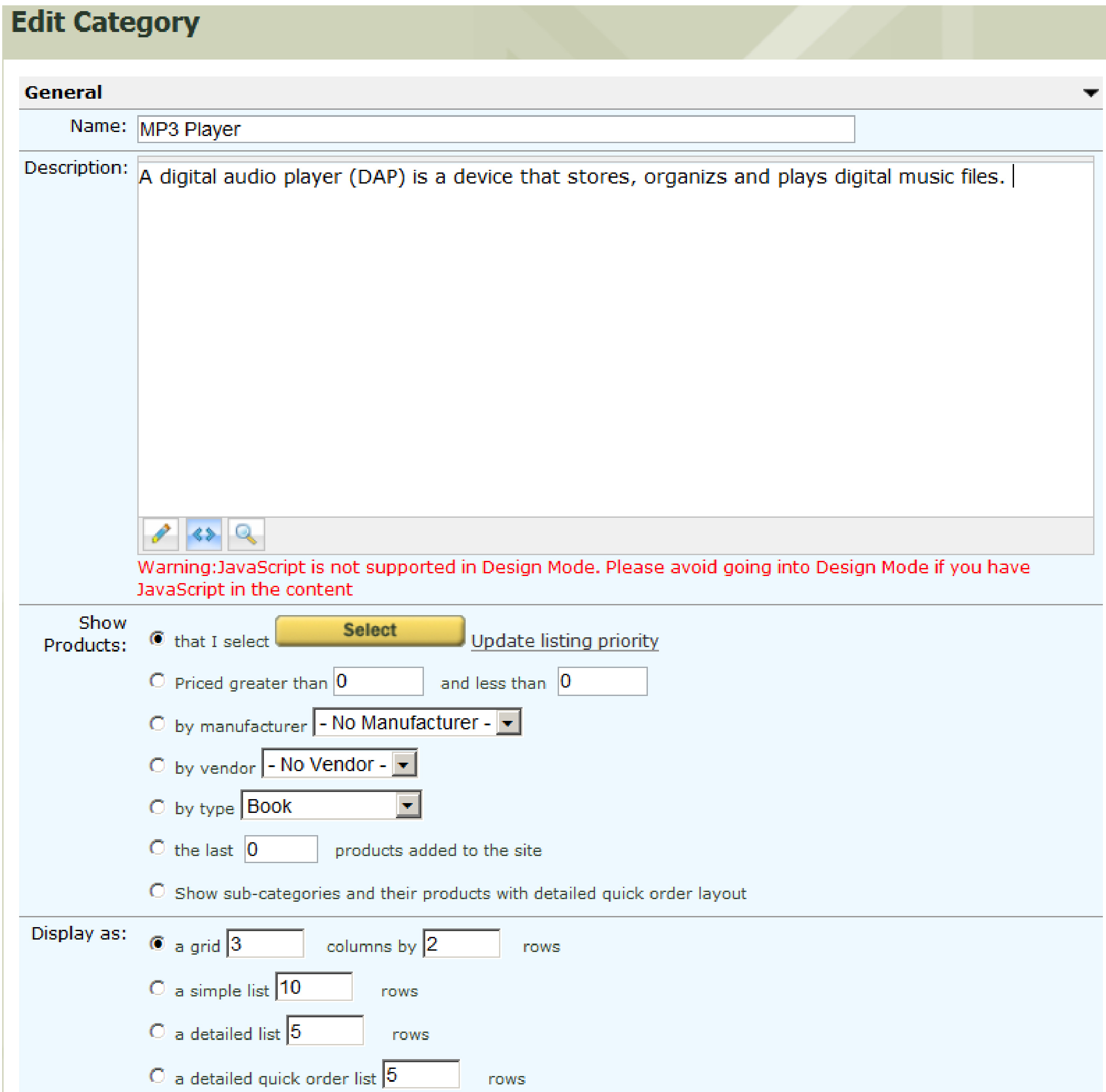


Figure 4-9 Edit Category – top portion

The accompanying figure shows the control of what content a category will display. When viewing a category with sub-categories associated, a grid will show the sub-categories with images whereas the simple/detailed list will show the sub-categories as a list of links to the sub-categories. Categories can be configured to show:

- Select products
- Products meeting pricing criteria
- Products assigned to a manufacturer or vendor
- Type
- Last number of products added to the store representing "New Products"

Set the display properties to control the layout of the category in e a grid, list, or a detailed list. A simple list will show links to products met by the criteria specified. A detailed list will display information, pricing and an associated image for the product.

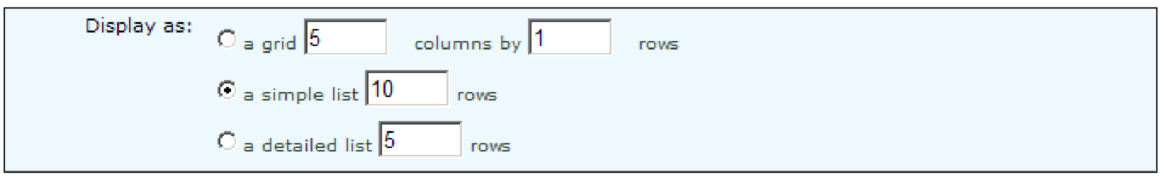


Figure 4-10 Set Display Properties

Images can be associated with categories and allow full control of the layout by showing an image the title and description of the category as shown in the following figure.

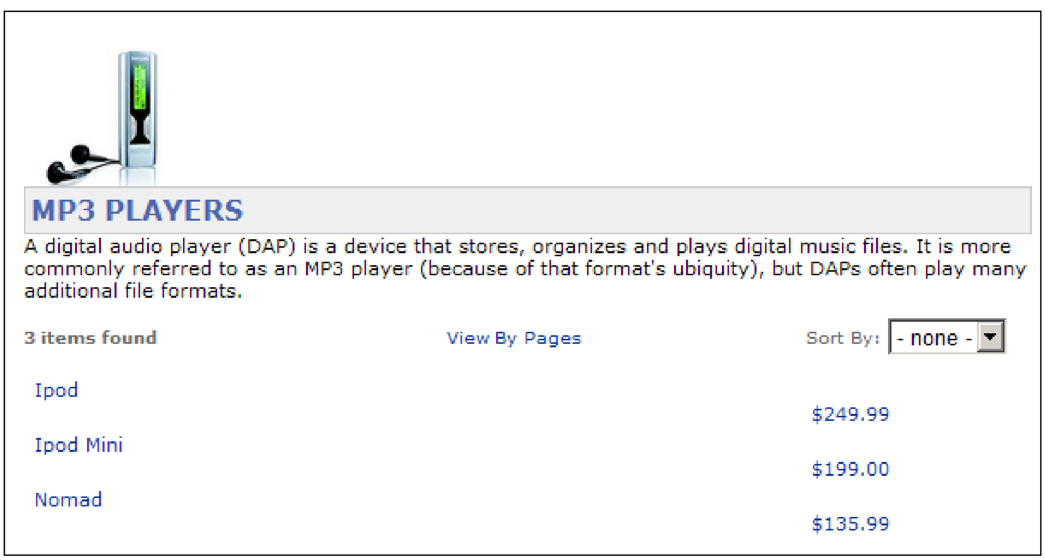


Figure 4-11 Image and Description Information

When editing a category, you also have full control of the Menu Tab displayed across the top of the screen. You can use the normal text option, or specify an image for artistic display of tabs. The Menu Image is the image to use for the tab, set the Active Menu Image for the image to use to represent the tab as the selected tab. A category tab can also link to an external URL as defined in the Custom Page

URL option. If you would like the external URL to display in a new window, check the "Open link in a new window" option.

As shown in the accompanying figure, you can set where the category is displayed. If a top menu category strip is active, you can set whether or not this category is displayed in the list. If this category is hidden, links can be established to the category, but the category itself will not appear in a top or side menu.

Figure 4-12 Meta Tags

FIELD	DESCRIPTION
Meta Tags	If entered, will override the store meta tags for the main site for search engine optimization *Product Name will appear in the title bar unless a Meta Title is entered (which will override the product name used)
Meta Keywords	Keywords associated with the product should be entered here.
Meta Description	The meta description for the product should be entered in this textbox.

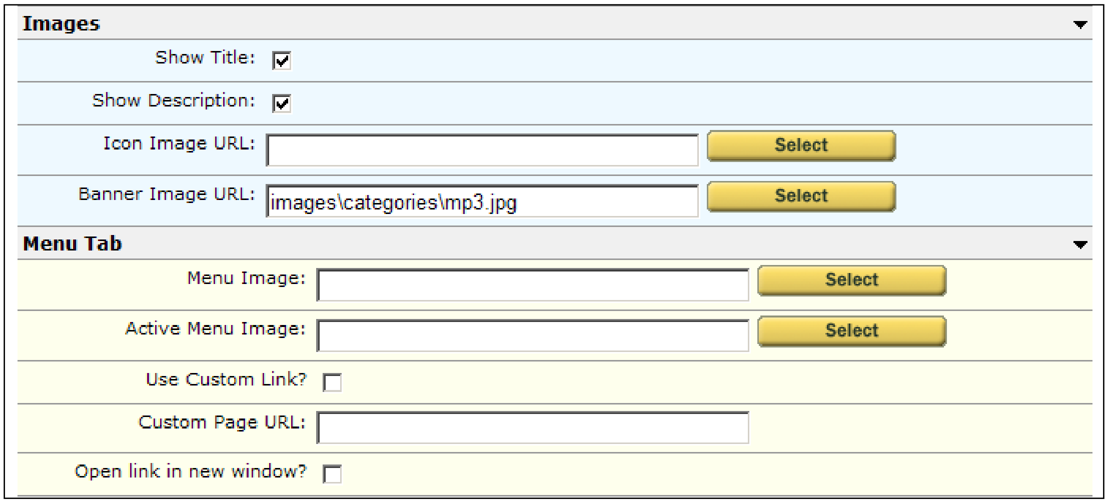


Figure 4-13 Category Image and Menu Tab Properties

FIELD	DESCRIPTION
Show Title	Disabling this option will hide the image title
Show Description	Disabling this option will hide the description
Icon Image URL	A URL location link to an icon image can be set here
Banner Image URL	A URL location link to an icon image can be set here
Menu Image	This option displays an image for the on the top menu
Active Menu Image	When a category is selected and browsed, this option will display an image on the top menu
Use Custom Link?	When enabled, displays an image from another location
Custom Page URL	When Use Custom Link? has been enabled, this field is where the URL of the image location is entered
Open link in new window?	Create a pop-up window to display the link

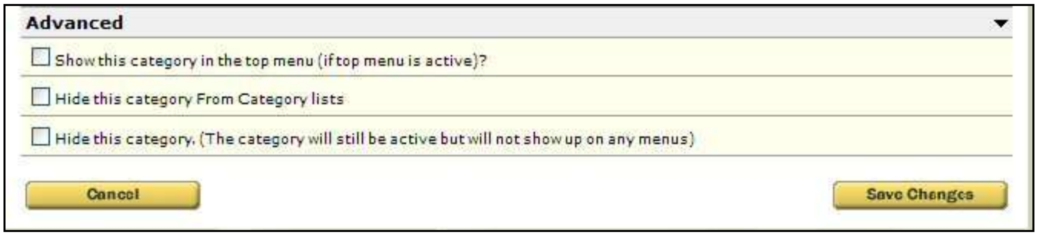


Figure 4-14 Advanced View

FIELD	DESCRIPTION
Show this category in the top menu	If a top menu is being used, the category is displayed in that area
Hide this category from Category lists	When category lists are displayed, this category will be hidden
Hide this category	This option will hide the category on the website

4.4.2. Products

Administration website location: ***Catalog*** *>* ***Products***

The core of any store is the products. Prior to importing product items from Great Plains, it is important to have a good understanding of all related areas in the admin area that contribute to the presentation and sale of your business products.

When eSSS is installed along with the Nodus Synchronizer, the synchronizer will continuous send item updates made in Great Plains to the eSSS site.

NOTES:

- Single items can be imported by using the Import options feature on the Products page. This import feature is often used to verify that the integration to GP is running properly.
- Once items are imported to eSSS, the Products page allows you to search and refine the product properties.

Figure 4-15 Import Products

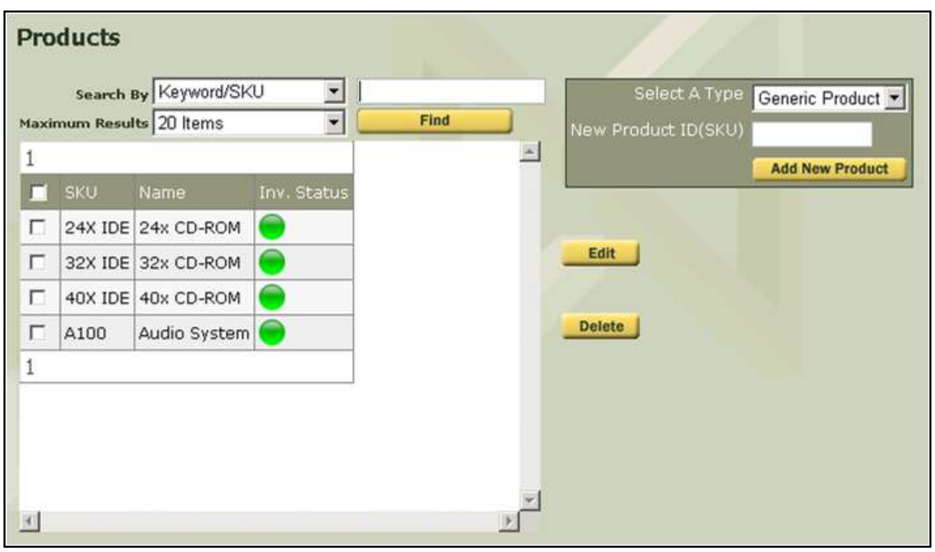


Figure 4-16 Products Page

4.4.2.1. Editing Products

*Administration website location: **Catalog** > **Products** > (select an item and choose edit) > **General Info***

To edit a product, begin by selecting an item from the **Products** page and clicking the **Edit** button. The General Information page will open and a unique menu is now available on the left side of the page. The following sections displayed on the menu describe editing options for each product item.

- General Information
- Customer Choices
- Images
- Related Items
- Categories
- Inventory
- File Downloads
- Customer Reviews
- Volume Discounts

IMPORTANT: Customer and inventory deletions in Great Plains are not automatically synchronized with the store site, and must be manually removed using the website's Administration User interface.

4.4.2.1.1. General Information

*Administration website location: **Catalog** > **Products** > (select item and choose edit) > **General Info***

This section contains multiple settings that control features from how the product is displayed on the website to configuring how taxes are charged for the item. Review the settings detailed in the following tables for each section of General Information.

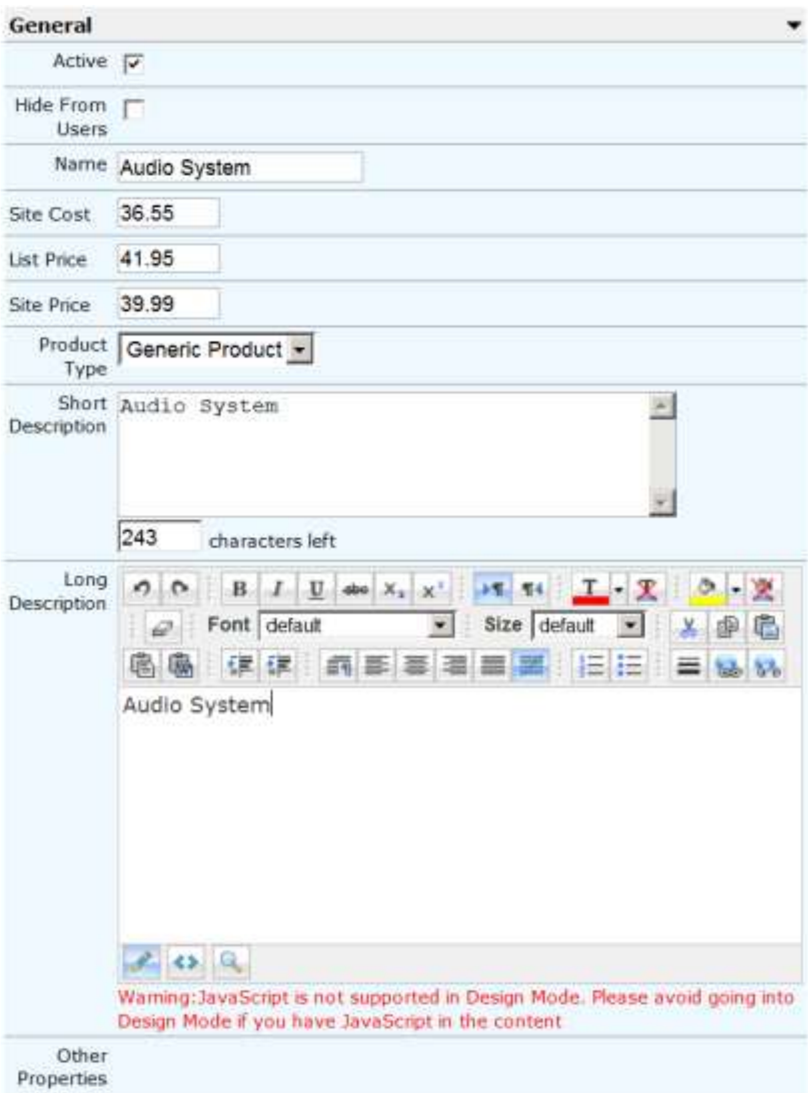


Figure 4-17 General Information (top category)

The accompanying figure shows the top portion of the general information page. Fill out the fields as completely as possible as described in the following table.

SETTING	DESCRIPTION
Active	The product appears in the store view when this box is checked
Hide from Users	When this checkbox is marked, the item will be hidden
Name	The title of the product as it should appear in the catalog
Site Cost	User cost for the item
List Price	Retail price for the item
Site Price	Cost to the customer
Product Type	This feature allows admin users to manually change the product type of the item. Click the drop list to view product type options. New product types for an item can be created at **Catalog** > **Product Types** (see the related section)
Short Description	There is a 255 maximum character description of product
Long Description	Full description of product with no character limit
Other Properties	Allows selection of a property type to be associated with the product item. To add a property type, go to **Catalog** > **Type Properties.**

Figure 4-18 Advanced Options

FIELD	DESCRIPTION
Item Class	GP Item Class
Default UOM	The default Unit of Measure in GP.
Default Price Level	The default price level in GP.
Default SiteID	Lists the default site ID stored in Great Plains.
Qty Decimal Places	Sets the default number of decimal places used for inventory quantity.
Minimum Qty	The minimum quantity that may be purchased in an order.
Maximum Qty	The maximum quantity that may be purchased in an order.
Display Customer Choices As	When a product has Customer Choices associated, the choices can be displayed in either a grid layout or individual fields. Not all types of choices will work with a grid display type - test products carefully to ensure choices are displayed as desired.
Gift Wrap Allowed	Enables an optional gift wrap fee to be charged.
Manufacturer	Select the manufacturer from the drop down list, if not listed can be added in the **People** > **Manufacturers** section. May be used for drop ships or product categories.
Vendor	Select the vendor from the drop down list, if not listed, can be added in the **People** > **Vendors** area. May be used for drop ships or product categories.

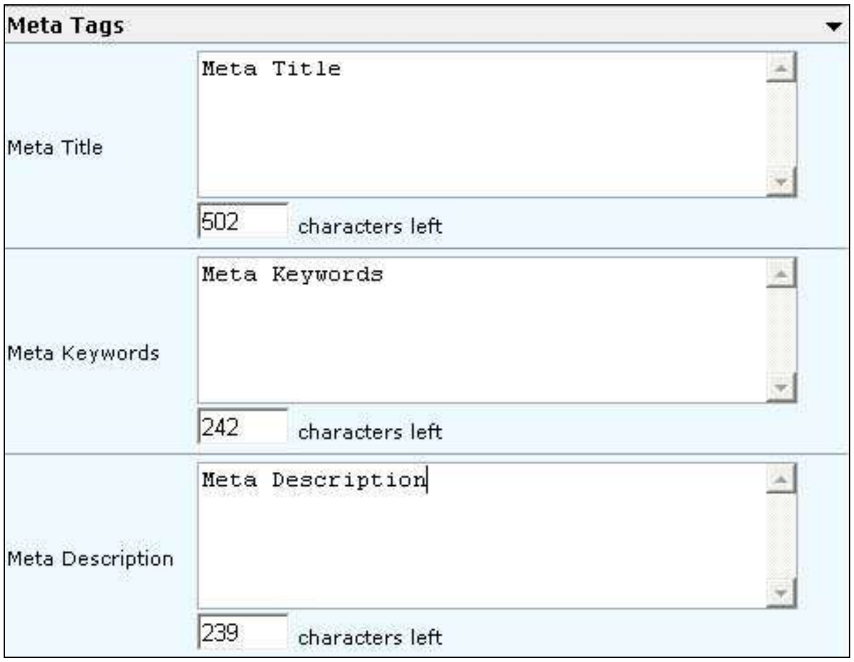


Figure 4-19 Meta Tags

FIELD	DESCRIPTION
Meta Tags	If entered, will override the store meta tags for the main site to facilitate search engine optimization. *Product Name will appear in the title bar unless a Meta Title is entered (which will override the product name used).
Meta Keywords	Keywords associated with the product should be entered here.
Meta Description	The meta description for the product should be entered in this textbox.

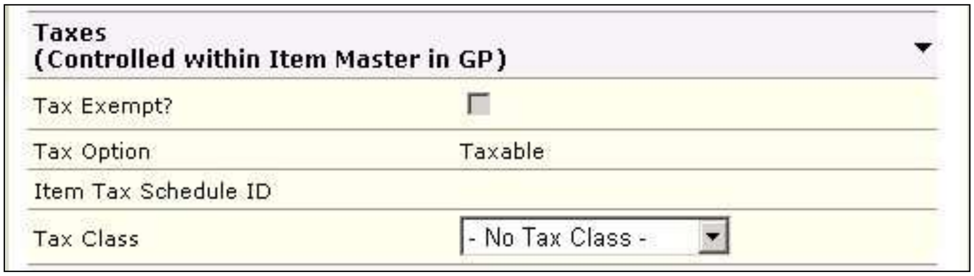


Figure 4-20 Taxes

FIELD	DESCRIPTION
Tax Exempt	Mark the checkbox if this product is tax exempt. If marked, the system will not check for tax data.
Tax Option	Display will indicate the item's Tax Option status. This configuration is stored in GP.
Item Tax Schedule ID	Displays the Item Tax Schedule ID stored in GP that is associated with the product item.
Tax Class	Select the appropriate tax class for the product item. Tax classes are set up in the administration section of eSSS in **Settings** > **Tax Classes**.

Figure 4-21 Shipping

FIELD	DESCRIPTION
Non-Shipping Item	If this product is non-shippable, i.e. electronic download or a service, check this checkbox to prevent collection of shipping information.
Ship in Separate Packages	If checked shipping charges will be applied individually.
Ship From	Identify where the package will be shipped from for shipping calculations.
Weight/Dimensions	Weight is in pounds or kilos (may be imported from Great Plains, if stored on item card), dimensions are inches or centimeters.
Extra Ship Fee	Adds a shipping surcharge to the product during checkout.

4.4.2.1.2. Customer Choices

*Administration website location: **Catalog** > **Products** > (select item and choose edit) > **Customer Choices***

Customer choices are customizations/choices that a customer specifies when purchasing a product. For example, if selling t-shirts, the customer needs to specify the size of the shirt. The range of shirt size selections are the customer choices. When creating a new customer choice, there are several options to control the display of the choices to the shopper as shown in the accompanying table.

SETTING	DESCRIPTION
Text Input	Provides a textbox for customer entry.
Drop Down List	Creates a droplist for customer options.
Radio Button List	Sets up a radio button list for item options.
HTML area	Allows HTML code to be added for special display effects. **NOTE: JavaScript is not supported in Design Mode. Please avoid going into Design Mode if you have JavaScript in the content**
Accessory Checkboxes	Provides checkboxes to for the customer to choose an additional sub-level of choice options. For example, in addition to shirt color choices, an additional level of options for special embroidery could be added.
Accessory Radio Button List	Creates a radio button list for accessory options.
Accessory Drop Down List	Creates a droplist for accessory options.

To create Customer Choice options:

1. Use the search function to create a product list. Leaving the search field blank will show all items.
2. Select an item in the Products list and click the **Edit** button
3. Select **Customer Choices** from the menu on the left

NOTE: At this point, it is recommended to decide whether to create a Shared Choice. A shared choice is similar to a customer choice, but more generic and can be applied to several products.

EXAMPLE: If a shirt is being set up for customer choices with standard accessory options, such as sizes (S, M, L, XL), that could be used for other products, it is recommended to additionally set up this product item as a Shared Choice so that other products could use these option settings. For information regarding Shared Choices, see **Catalogs** > **Shared Choices** in this user's guide.

Customer Choice: customized for only a specific product item

Shared Choice: Similar to a customer choice, only set up to be used for all products

4-22 Customer Choices

4-23 Customer Choices as seen on webstore

4. To continue with setting up a Customer Choice, from the **Add New Choice** dropdown select **Drop Down List** or **Radio Button List**
5. Click **New** to open the **Edit Product Choice** page

Figure 4-24 Add Property Name and Display Name

6. Enter a property name and a display name for the item, For example, if setting up color options for a shirt, the property name could be 'Color' and the display name for the website could be 'Choose Your Color.'

   NOTE: Other options are available at this point, such as making the product choice a required field and options affecting the display, such as the ability to wrap text and change text box size

Figure 4-25 Edit Choice Items

7. By the **Items** field, click **New** to open the **Edit Choice Item** page. Here a description for the specific option is selected
8. In the **Display Name** field, enter an option description. For example, if setting up color options for a shirt, one option could be the color 'Blue'
9. In the **Value** field, enter a value that will be displayed in the shopping cart under the cart item description. 'Blue,' or an abbreviation for Blue, such as 'B' could be used

10. Several other functional options are available for the item in the Edit Choice Item page, including:

SETTING	DESCRIPTION
Null Item	Indicates whether this selection has a value of zero or has an actual value. Often used when an option is intended to describe other variables (such as a Customer Choice directing users to "Choose from this list of colors"), null items have no value.
Set as Default Item?	Allows the configuration for the customer choice selected to be displayed by default.
Image URL	Permits an image for the product to be pulled from another location.
Price Adjustment	Enter an amount for any configuration selected that adds extra cost charged to the customer for an item. For example, an embroidered shirt that has an option for gold thread that increases the cost of the item.
Cost Adjustment	Sets an amount a configuration chosen by the customer that results in an increase to the base cost of the item.
Weight Adjustment	If an option results in an option that increases the weight of an item, the cost can be increased with this setting.
Shipping Cost Adjustment	If an option results in higher shipping costs, a price adjustment can be made with this setting.

11. Click **OK** and the display returns to the **Edit Product Choice** screen
12. Click **OK** again
13. From the menu on the left select **Inventory**
14. Enter the quantity and the SKU

    NOTE: The SKU entered here will be used as the Great Plains Item Code when the item is submitted with an order. The Item Code must exist in Great Plains for this to work.

15. Enter additional information on the Inventory page as needed
16. Click **OK**

4-26 Item Numbers Setup

To complete the customer choice setup, the accessory options created in eSSS must be linked to their SKU in GP for each customer choice option.

1. Navigate to **Products** > **Edit** > **Inventory**
2. Each customer choice option (ex: blue, green, red) set up for an item will appear in the item's **Inventory** page as shown in the accompanying figure.
3. Enter the SKU created for the item in GP into the textbox in the SKU column
4. When finished, click the **OK** button

4.4.2.1.3. Images

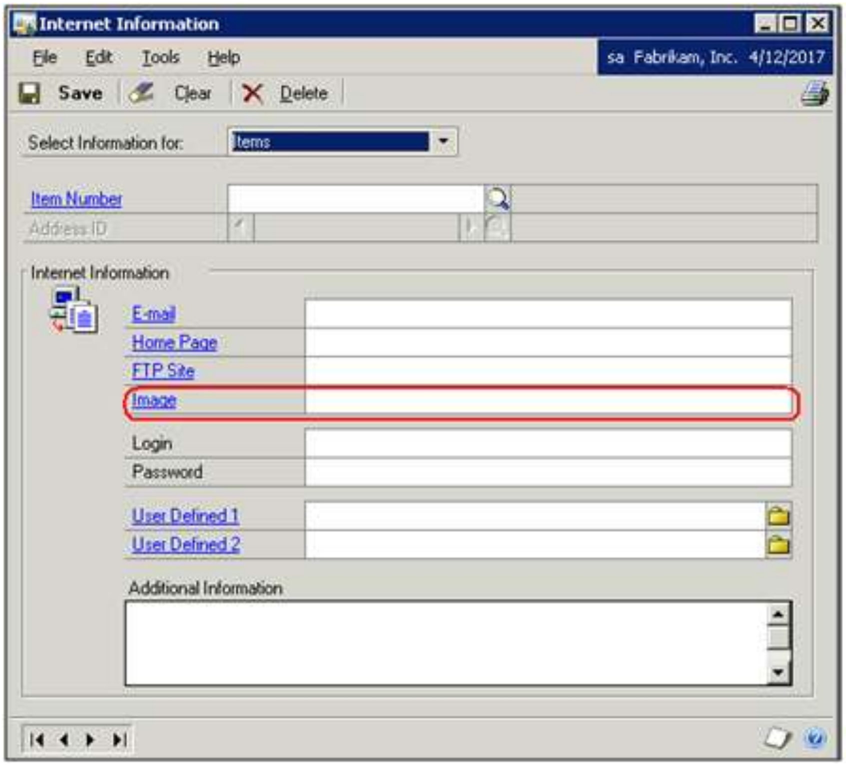
*Administration website location: **Catalog** > **Products** > (select an item and choose Edit) > **Images***

Each product can be displayed with unlimited images. Depends on the layout of the theme used, typically only the "Small" and "Medium" images are needed. Sizing options can be set in the **Settings** > **General Options** area, which also provide the sizing for "Tiny" size images. The "Tiny" sized images are using the "Small" size image files, but displayed in a different size using HTML. While the sizing options controls the sizes for "Tiny", "Small", and "Medium" images, unlimited number of "Additional Images" can be assigned to products and they would appear in its actual physical size as it was uploaded.

The "Small" size images are used in some category page layouts, and "Medium" size images are displayed on the product detail page. "Tiny" size images are displayed on the cart page if the option is enabled under **Settings** > **Orders: Cart Page Options**, and are displayed on the product detail page if the **Show Additional Image Thumbnails on Product Detail Page** option is enabled under **Settings** > **General Options: Product Page Options**.

New products also have the option of a "New" image overlaid to identify new products added to the store within a set time criteria. Control of the "New" image is handled in the theme style sheet. Settings for the time criteria this "New" image is displayed is controlled in the **Settings** > **Category and Search** area.

File path to the "Small" and "Medium" sized images are integrated from GP's **INET4** field, which is labeled **Image** by default. The value from the Image field will populate the "Small" and "Medium" image paths when the item is imported from GP.



4-27 GP Image Settings

If there's a need to specify different image paths, the image paths can be managed on eSSS instead of GP. To turn off the image path integration:

1. Navigate to **Settings** > **Nodus/Great Plains** > **Item Import Options**
2. Un-check the **Update Item image links on Re-import** checkbox option to avoid GP overwriting any manual assignment
3. Use the following instructions to manually assign image paths for the small and medium images.

To Manually Specify an Image Path:

1. Navigate to **Catalog** > **Products**
2. Filter for the desired product item to be associated with the image
3. Mark the checkbox for the product item and click the **Edit** button
4. The product **General Information** page loads. From the left side menu, click **Images**
5. When the **Edit Product Images** page opens, populate the image paths by clicking the **Select** button to the right of the Small or Medium image area. Another option is to manually type-in the path to the file (relevant to the website root folder on the web server).

4-28 Edit Product Images

6. Locate the image in the **Browse Images** window and click the **Choose This Image** button
7. The **Edit Product Images** page returns. Add additional images to be displayed with the product item by clicking the **Add Additional Image** button or repeat the process described in the preceding steps

Figure 4-29 Image Upload Utility

To Resize or Optimize the Image:

1. After clicking the **Select** button, the page to upload images will show as in the accompanying figure. Click the **Browse** button to select an image from your local drive.
2. Choose the appropriate settings in the **Upload Images** box. If you would like the image to display in the source file size, click the **Upload** button. Options are available to automatically resize and optimize the image for you, making it easy to create consistently sized images. Depending on the setting in the **Settings** > **General Options** area, images will be forced to the defined sizes or displayed in the source file size.

Careful planning will help keep the store organized. It is recommended to rename files such as "book_small.jpg" "book_main.jpg" etc. When the properties have been set, click the **Upload** button. The image will be displayed in the right side preview window, click the **Choose this Image** button to use this image.

View images from the folder browser by clicking on a folder (bottom center of the accompanying figure). Select the image in the list and then the **Choose this Image** button to select this image for use.

4.4.2.1.4. Related Items

*Administration website location: **Catalog > Products >** (select an item and choose Edit) **> Related Items***

Related items are similar products that you would like to display when the main product is viewed. For example, in the case above when the "*Computing for Dummies*" book is viewed by a shopper, the Related item "Dell Powerhouse" will be displayed in a small list below the main product image as shown in the accompanying figure.

Figure 4-30 Related Items

Figure 4-31 Related Item in Store

4.4.2.1.5. Categories

*Administration website location: **Catalog > Products >** (select an item and choose Edit) **> Categories***

Assuming categories have been created prior to creating/editing the product, the categories list shown in accompanying figure makes it easy to select where the product will appear. To associate the product with one or multiple categories:

1. Check the checkbox corresponding to each category name as shown in the following figure.
2. Click the **Save Changes** button

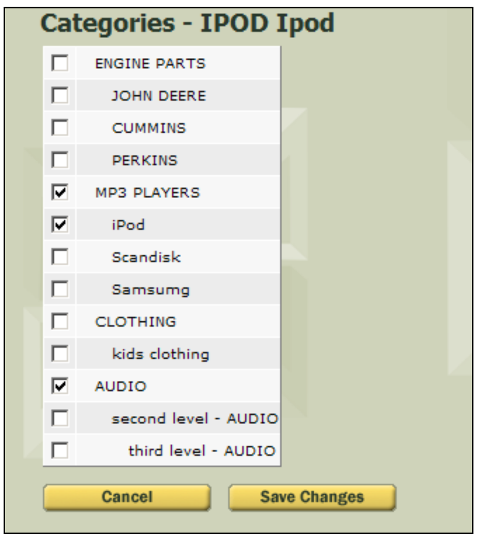


Figure 4-32 Assigning Categories

4.4.2.1.6. Inventory

*Administration website location: **Catalog** >**Products** > (select and edit an item) > **Inventory***

This page controls inventory handling of the selected product. To configure the inventory settings for a product item, refer to the accompanying table.

SETTING	DESCRIPTION
Available Qty	The item quantity available on the website can be adjusted from this textbox.
Reserved inventory level	By default, items are considered out-of-stock when the inventory level reaches zero. .The item is considered out-of-stock when it reaches the reserved inventory level entered in this field.
Current Status	This is a display on the item inventory page that Indicates whether a product is currently available.
When available qty reaches the update level…	This drop list provides a set of options for what action is taken when item inventory reaches a specified replenishment level. Options include: • Remove Product From Store • Leave Product on Store (do not track inventory) • Show Product as Back-Orders. Allow Purchase • Show Product as Back-Ordered. Do Not Allow Purchase
Back-Ordered Message	Enter a customer message to explain that a product item is in back ordered status.

Figure 4-33 Product Inventory

4.4.2.1.7. File Downloads

*Administration website location: **Catalog > Products >** (select an item and choose Edit) **> File Downloads***

Downloadable digital files, such as music, books or software can be sold on the website. To set up download file sales:

1. Enter the information in the File Download area of the Edit Product configuration
2. You can either upload a file using the Browse button, or if the file is too large and risks timing out the upload process the file can be sent via FTP into the Files folder
3. Enter the file name located in the Files folder if it was manually sent by FTP
4. Enter the name you would like displayed to the customer in the **Friendly Title** field
5. Select the options for availability of the download after it has been purchased and the number of times it can be downloaded. If the **Available for** field is set to unlimited, the quantity is bypassed.
6. Click the **Add File** button

NOTE: For unlimited downloads without a quantity limit, set the **Available for** setting to Unlimited and **Can be Downloaded** quantity to zero (0).

Figure 4-34 File Downloads

4.4.2.1.8. Customer Reviews

*Administration website location: **Catalog > Products >** (select an item and choose Edit) **> Customer Reviews***

If configured in the **Settings** > **Product Reviews** area, product reviews may be created or edited in the Product Reviews area of the Edit Product option (Navigate to **Catalog** > **Products** > (choose product and click **Edit** > **Inventory**). You can create new product reviews manually if collecting via e-mail or another source not directly from within the store. From this area you can also moderate the reviews for each particular product.

Figure 4-35 Customer Reviews

4-36 Edit Customer Reviews

4.4.2.1.9. Volume Discounts

*Administration website location: **Catalog** > **Products** > (select an item and choose edit) > **Volume Discounts***

You may offer volume discounts to eStore customers. The discounts must be set up in the Great Plains pricelist. When you import items from Great Plains, all pricing data including volume discounts are imported. You can also set volume discount levels for each item in eSSS.

Figure 4-37 Volume Discounts

To set up volume discounts:

1. Navigate to the **Volume Discount** page for the desired item
2. To set the first volume pricing level, enter a required quantity for the discount to take effect
3. In the **Price** textbox, enter the item price to be applied when the required quantity is reached
4. Click the **New Level** button
5. Repeat for each level

NOTE: Each level can be edited or deleted by clicking the corresponding links as shown in the accompanying figure.

4.4.2.1.10. Extended Pricing/Myridas

If used, this feature should be activated before importing items from Great Plains.

Extended Pricing is a Great Plains feature that allows special conditions to be set for pricing items, such as establishing a percentage discount and date range for a President’s Day sale. Myridas is a similar add-on program with specialized features.

NOTE: Great Plains Extended Pricing and Myridas cannot be used at the same time. Either of these features must first be configured in Nodus Synchronizer.

1. Navigate to **Start** > **All Programs** > **Nodus Technologies** > **Nodus Synchronizer** > **Configuration** to open the **Nodus Synchronizer Configuration** window and click **Store Setup**
2. When the **Store Setup** window opens, select the store where extended pricing is to be activated and click **Synchronizers**
3. When the Synchronizers window opens, choose the inventory items under the Synchronizer class and click **More Options**
4. When the **Item Settings** window opens, check the **Synchronizer Extended Pricing** box.
5. In the **Extended Pricing Type** drop list, chose either **Myridas** or **Extended**
6. Close the **Synchronizer** window

The choice must now be activated in eSSS.

1. From the eSSS home page, navigate to the **Settings** tab > **Nodus/Great Plains** from the vertical **Settings** menu
2. In the Feature Management section at the bottom of the page, from the GP Pricelist Setup drop list, choose either **Use Extended GP Pricing** or **Use Myridas AG Pricing**
3. Click the **Save Changes** button

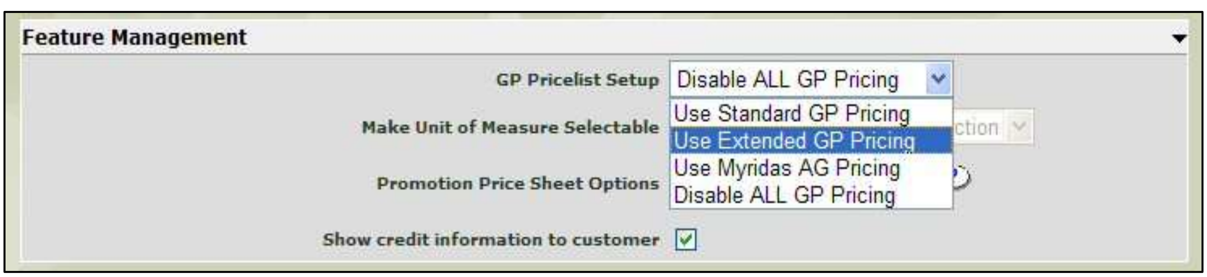


Figure 4-38 Extended Pricing

4.4.3. Catalogs

Administration website location: ***Catalog*** *>* ***Catalogs***

The Customer Specific Catalog is an optional module that permits the administration to assign a product(s) to a catalog for specific customers.

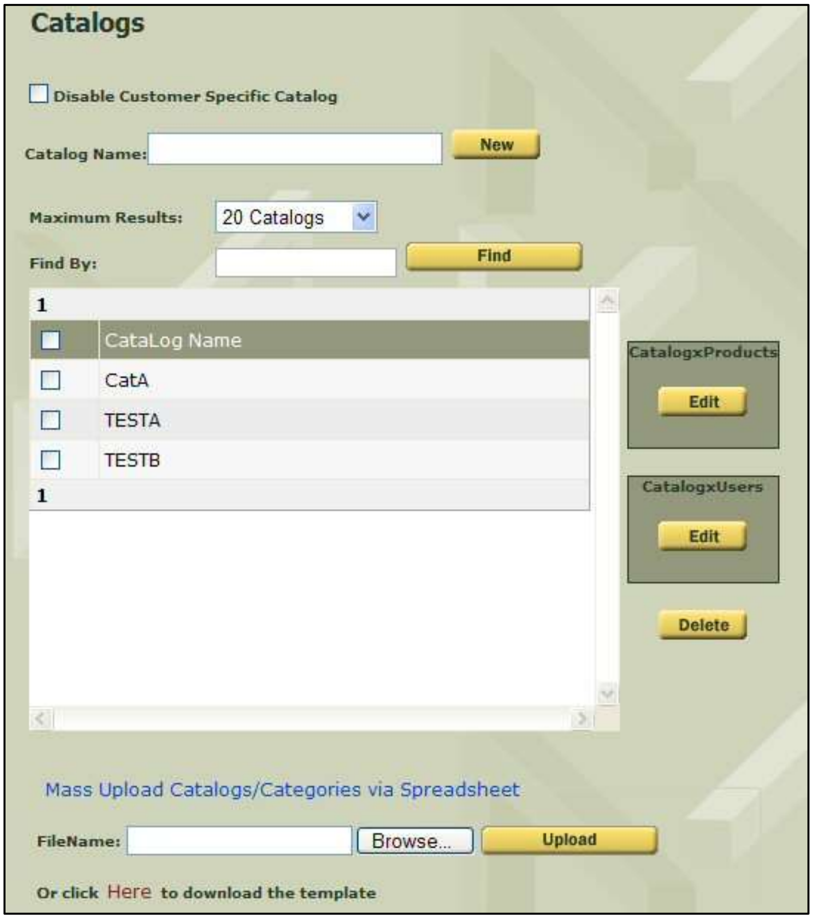


Figure 4-39 Customer Specific Catalog

4.4.3.1. Setting up the Catalog

1. Unmark the **Disable Customer Specific Catalog** checkbox to enable the Customer Specific Catalog **NOTE:** Once enabled by default, all users will not see any products until permissions have been assigned to them.
2. In the **Catalog Name:** box, enter a name that describes the new category
3. Click the **New** button and the catalog name appears in the display box

4.4.3.2. Setting Up Products in the Catalog

1. Use the Search feature to locate a catalog that requires product set-up
2. In the display box, mark the checkbox by the catalog
3. Click the **Edit** button in the **CatalogxProducts** box to open the Edit Catalog Products page
4. Use the search function to look up products by keyword or SKU number
5. Mark the checkbox by the product to be added to the catalog. Multiple products can be chosen as needed, or the whole page of product selected by marking the checkbox in the header row
6. Click the **Add** button to populate the Selected Products window
7. Click the **OK** button

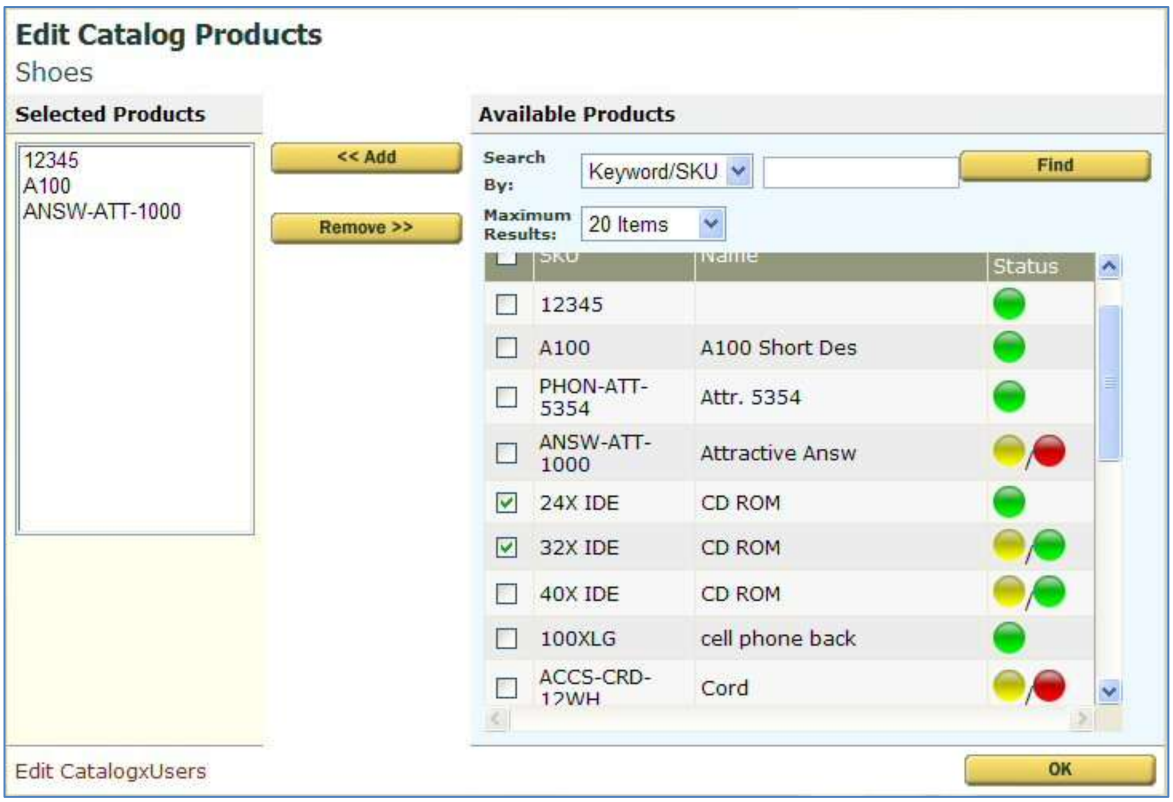


Figure 4-40 Edit Catalog - Products

4.4.3.3. Assigning Users to the Catalog

1. Use the Search feature to display a list of catalogs
2. Mark the checkbox by the catalog where users are to be assigned
3. Click the **Edit** button in the **CatalogxUsers** box
4. Use the Search feature to locate the user(s) to be assigned to the catalog
5. Mark the checkbox by the user to be assigned to the catalog
6. Click the **Add** button to populate the Selected Users/Classes window
7. Click the **OK** button

NOTE: This page gives the option of assigning viewing rights to customers and/or to GP Class IDs. If all users are to be granted viewing rights, the **Everyone** checkbox is marked.

Figure 4-41 Edit Catalog - Users

4.4.3.4. Deleting a User or Product from the Catalog

1. Mark the checkbox by an existing catalog
2. Click the Edit button in either the **CatalogxProducts** or **CatalogxUsers**, depending on whether a user or product is to be added
3. The Edit page opens
4. Delete a product or user by highlighting the entry in the Selected Products or Selected Users window
5. Click the **Remove** button
6. Click the **OK** button

4.4.3.5. Deleting a Catalog

1. User the Search feature to populate the display window
2. Mark the checkbox by the catalog to be deleted
3. Click the **Delete** button

4.4.4. Shared Choices

*Administration website location: **Catalog >Shared Choices***

Shared Choices are global, pre-defined fields that can be used with any product in the store and is created once. Once created, the Shared Choice acts as a template for use when Customer Choice options are created for a product item.

For example, a Shared Choice can be created for a generic shirt that would include variables such as available sizes and colors. If dozens of shirts from different manufacturers need to be input onto the webstore, using a pre-made Shared Choice template eliminates the need to input color and size options for each shirt manufacturer.

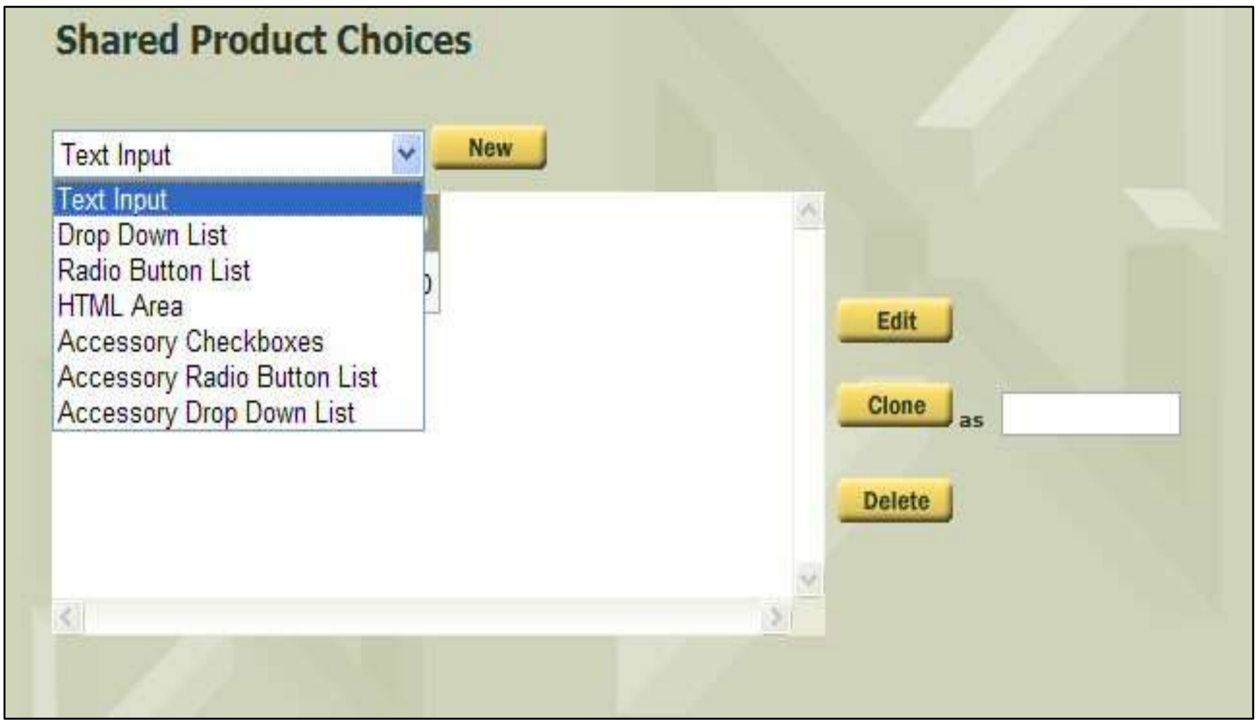


Figure 4-42 Shared Choices

4.4.4.1. Creating a Shared Choice option

1. Choose a customer input method such as radio button or text entry, from the droplist
2. Click the **New** button
3. When the **Edit Product Choice** page opens, enter a property name and a display name for the item, For example, if setting up color options for a shirt, the property name could be 'Color' and the display name for the website could be 'Choose Your Color'

Figure 4-43 Shared Choices - Edit Product Choice

NOTE: Other options are available at this point, such as making the product choice a required field and options affecting the display, such as the ability to wrap text and change the text box size

4. By the Items field, click **New** to open the **Edit Choice Item** page. Here a description for the specific option is selected
5. In the **Display Name** field, enter an option description. For example, if setting up color options for a shirt, one option could be the color 'Blue'
6. In the **Value** field, enter a value that will be displayed in the shopping cart under the cart item description. 'Blue,' or an abbreviation for Blue, such as 'B' could be used
7. Several other functional options are available for the item in the **Edit Choice** Item page, including:

SETTING	DESCRIPTION
Null Item	Indicates whether this selection has a value of zero or has an actual value. Often used when an option is intended to describe other variables (such as a Customer Choice directing users to "Choose from this list of colors"), null items have no value.
Set as Default Item?	Allows the configuration for the customer choice selected to be displayed by default.
Image URL	Permits an image for the product to be pulled from another location.

Price Adjustment	Sets an amount for any configuration selected that adds extra cost charged to the customer for an item. For example, if an embroidered shirt has an option for gold thread that increases the cost of the item.
Cost Adjustment	Sets an amount a configuration chosen by the customer that results in an increase to the base cost of the item.
Weight Adjustment	If an option results in an option that increases the weight of an item, the cost can be increased with this setting.
Shipping Cost Adjustment	If an option results in higher shipping costs, a price adjustment can be made with this setting.

8. Click **OK** and the display returns to the **Edit Product Choice** screen
9. Click **OK** again. The Shared Choice is now ready for use when a new Customer Choice is create
10. To use a Shared Choice, choose a product item and open the **Customer Choices** page
11. From the **Add Shared Choice** drop list, choose a Share Choice option for the product
12. Click the **New** button
13. Continue to add the Customer Choice option as described in the **Customer Choices** section of this document as needed

4.4.4.2. Edit or Delete a Shared Choice

1. Navigate to the **Shared Product Choices** page and select a template by marking the checkbox next to the Shared Choice
2. To delete the Shared Choice, click the **Delete** button and the template is removed from the list of Shared Choices
3. To edit the Shared Choice, after marking the checkbox, click the **Edit** button
4. Make any edits needed for the Property Name and/or Display Name and click **OK**
5. If other options need to be changed, click the **Edit** button in the display list and make further edits from the **Edit Choice Item** page

4.4.4.3. Cloning a Shared Choice

If a Shared Choice template needs to be changed and then re-used for other items, the cloning feature can be used.

Cloning allows the Shared Choice template to be copied and renamed. At that point any changes needed can be made. The result is a new template that is easier to create than starting from scratch. To clone a Shared Choice template:

1. In the **Shared Product Choices** page, mark the checkbox by the original Shared Choice to be duplicated
2. In the **Clone as** textbox, enter a new name for the template
3. Click the **Clone** button and the new template will be added to the Shared Choices list
4. Mark the checkbox for the new template and click the **Edit** button to make any changes needed

Figure 4-44 - Cloning feature

.

4.4.5. Sales

*Admin .website location: **Catalog >Sales***

Merchants can create two types of sales in Nodus eStore Solution Stack; storewide sales and sales by individual product item.

4.4.5.1. Store Wide Sale

To create a new sale, navigate to **Catalog** > **Sales** and click the click the **New** button. Do not change Store Wide Sale default setting. Configure the discount type per the options as shown in the accompanying figure.

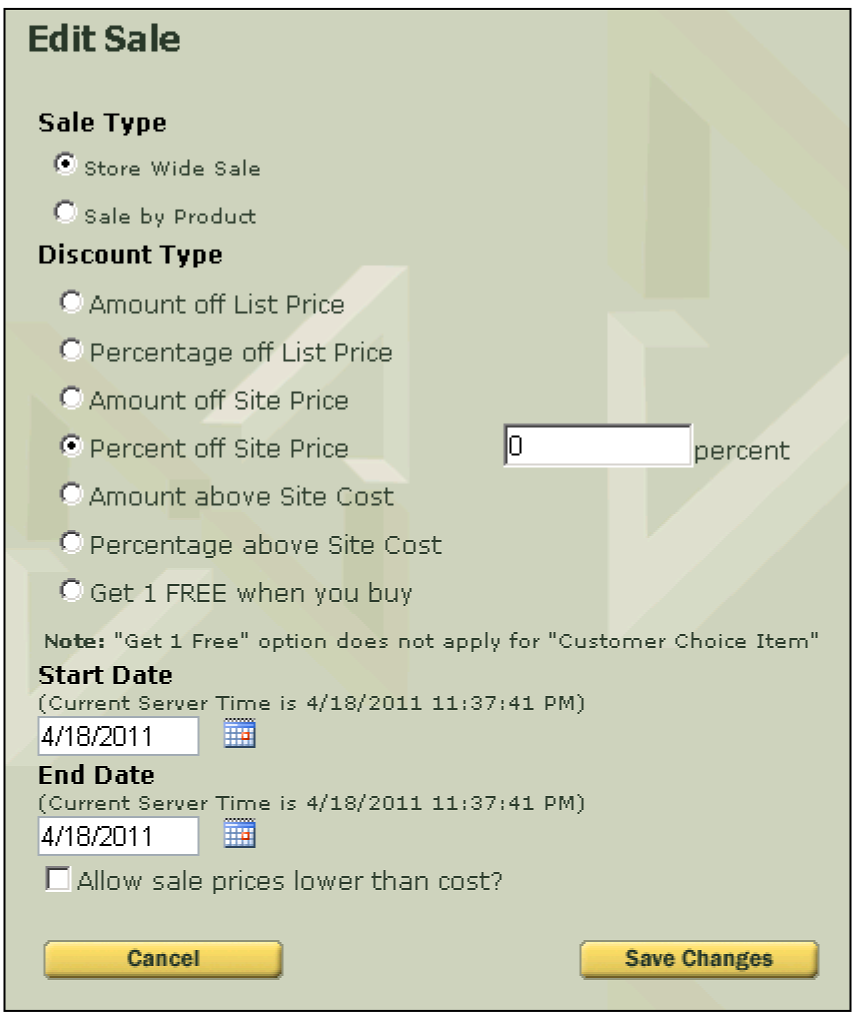


Figure 4-45 Store-Wide Sale Configuration

Figure 4-46 Store-wide Sale Configuration when GP pricing is enabled

1. Click the **Storewide** radio button
2. Select a discount type, which is one of three types:

   NOTE: The discount can be one of two methods: Percentage off or Dollar off.

SETTING	DESCRIPTION
Site Cost (your cost)	Unavailable when GP pricing is enabled
List Price	Unavailable when GP pricing is enabled
Site Price (normal sale price)	Display as GP pricing when GP pricing is enabled

3. Set the start date and end date for the term of the sale

   NOTE: To make the sale open-ended, set the ending date several years in the future.

4. When done, click **Save Changes** to commit the sale to the store.

4.4.5.2. Sale by Product

Creating a Sale by Product is similar to that of a Store Wide Sale with the added task of selecting the sale product items.

1. From the Sale page, mark the **Sale by Product** radio button
2. When the product selector list opens, filter and choose one or more product items
3. Click the **Add** button to move these items to the **Products Apply To** list
4. Select a discount option from the **Discount Type** list
5. Unless **Get 1 FREE when you buy** is chosen, enter a discount amount in the percentage/currency textbox
6. Choose a start and end date for the product sale

   NOTE: To make the sale open-ended, set the ending date several years in the future.

7. Click the **Save Changes** button

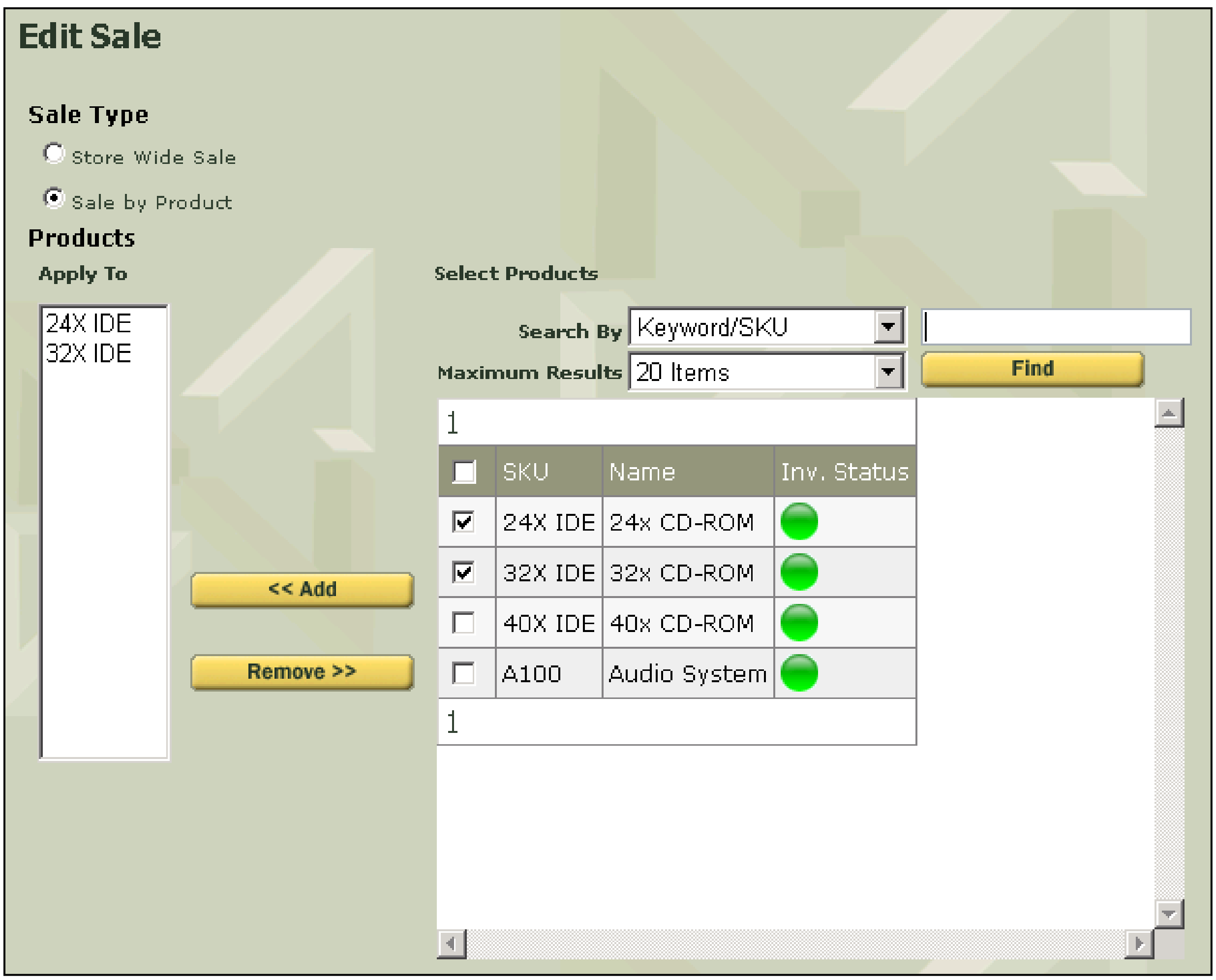


Figure 4-47 Sale by Product Configuration

Figure 4-48 Sale by Product Configuration #2

Figure 4-49 Sale by Product Configuration #3 when GP Pricing is enabled

4.4.6. Discounts

*Administration website location: **Catalog** > **Discounts***

A discount is similar to a sale with more granular control of when a discount may be applied, such as a quantity ordered or a price level minimum, as well as control of the sale by use of a "promotional code" to apply a discount to a purchase. Creating discounts can be used as rewards for frequent shoppers, marketing efforts, or focused merchant sale efforts.

To create a new discount, click the **Discount** menu item on the left side of the Catalog admin area. Four types of discounts can be created, and based on trade discounts and order totals.

4.4.6.1. Order Total

The order total discount is based on the final price of the order. To set up this discount:

1. From the **Discounts** page, click **New**
2. When the **Edit Discount** page opens, choose **Order Total** from the **Discount Type** order page
3. Enter a description of the discount in the **Discount Description** textbox
4. Choose permissions for either the **Everyone** group, or just **GP Customer Classes** and/or users selected in the following steps
5. Choose a users group by clicking the tab for:
   - **Users**
   - **User GP Class ID -** Pulls from the Great Plains users class list
6. Use search to filter a list of users
7. Mark the checkbox by the users or user classes that are eligible for the discount
8. Click the **Add** button to populate the Selected Users/Classes list
9. In the **By** field, enter a discount amount and choose a discount type
   - **Amount:** monetary discount. For example, $20 off
   - **Percent:** a percentage discount of the total
10. Enter a start and end date for the discount period

NOTE: To make the discount open-ended, choose an end date many years in the future

11. Set a quantity start and end point for the discount by entering a number in the **If quantity is** textbox. For example, if a shopper needed to purchase three items to be eligible for the discount, then '3' would be entered here.
12. Set an amount start and end point for the discount by entering a monetary amount in the **and the total is** textbox
13. If requiring a promotional code (entered during the checkout process), mark the **This discount requires a promotional code of** checkbox
14. Enter the name of the promotional code in the adjacent textbox
15. If there is a limit to the number of times the promotional code can be used for the discount, enter the amount in the **and can be used X times per customer** textbox

16. If multiple promotional codes are offered and no combining of these offers is allowed, mark the **The Promotional Code may NOT be combined with other Promotional Codes** checkbox
17. Click the **OK** button to save these settings

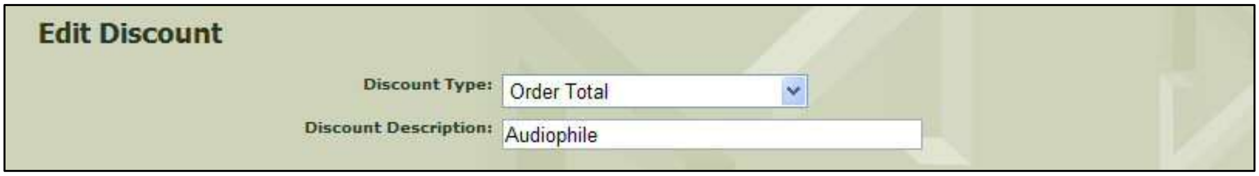


Figure 4-50 Discount by Order Total #1

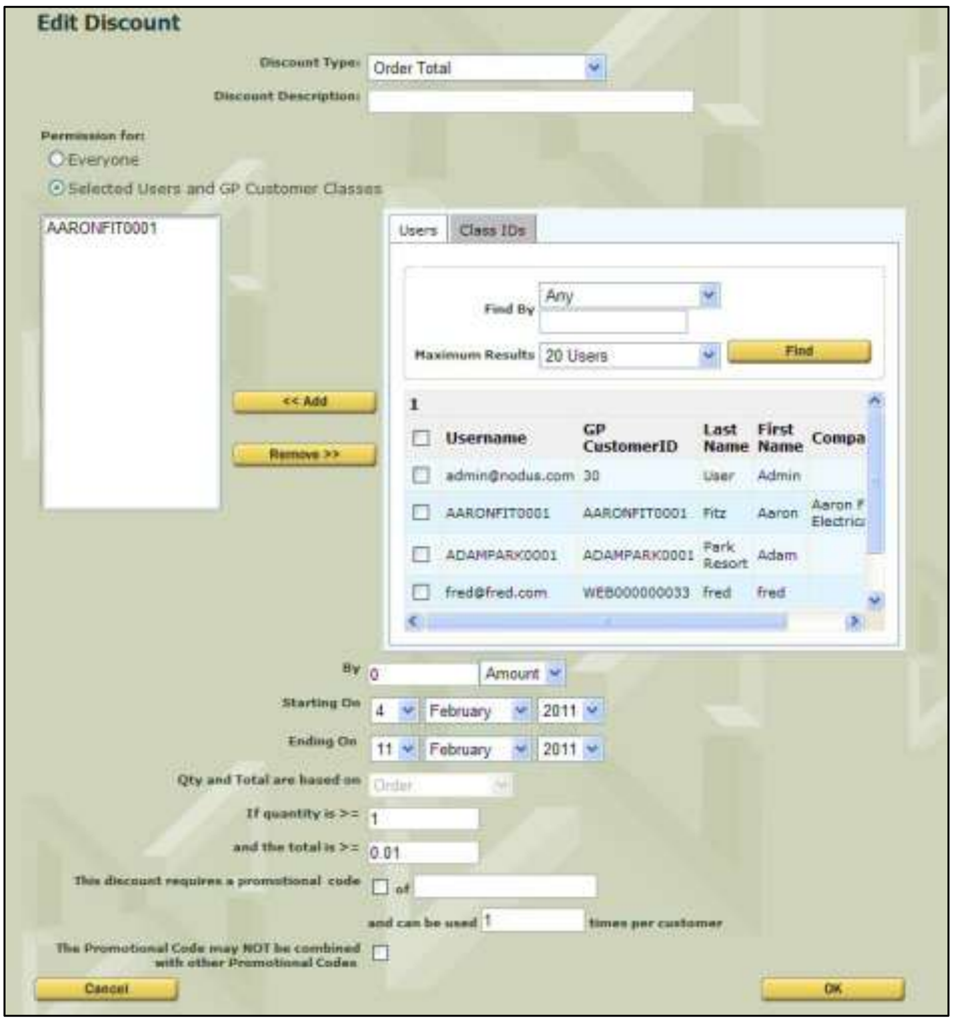


Figure 4-51 Discount by Order Total

4.4.6.2. Product(s)

The parameters for creating the discount are the same as discussed in the **Discount by Order Total** above. The only difference is the option to specify the product(s) the discount may be used for. Use the standard product filter system to locate the desired products then click the **Add** button to load the desired products that apply to the discount. To create product discounts:

1. From the **Discounts** page, click **New**
2. When the **Edit Discount** page opens, choose **Product(s)** from the **Discount Type** order page
3. Enter a description of the discount in the **Discount Description** textbox
4. Use search to filter a list of products
5. Mark the checkbox by the product items that are eligible for the discount
6. Click the **Add** button to populate the **Apply To** list
7. Choose permissions for either the **Everyone** group, or just **GP Customer Classes** and/or users selected in the following steps
8. Choose a users group by clicking the tab for:
    - Users
    - User GP Class ID - pulls from the Great Plains users class list
9. Use search to filter a list of users
10. Mark the checkbox by the users or user classes that are eligible for the discount
11. Click the **Add** button to populate the Selected Users/Classes list
12. In the **By** field, enter a discount amount and choose a discount type
    - **Amount -** monetary discount. For example, $20 off
    - **Percent -** a percentage discount of the total
13. Enter a start and end date for the discount period
    NOTE: To make the discount open-ended, choose an end date many years in the future
14. Set a quantity start and end point for the discount by entering a number in the **If quantity is** textbox. For example, if a shopper needed to purchase three items to be eligible for the discount, then '3' would be entered here.
15. Set an amount start and end point for the discount by entering a monetary amount in the **and the total is** textbox
16. If requiring a promotional code (entered during the checkout process), mark the **This discount requires a promotional code of** checkbox
17. Enter the name of the promotional code in the adjacent textbox
18. If there is a limit to the number of times the promotional code can be used for the discount, enter the amount in the **and can be used X times per customer** textbox
19. If multiple promotional codes are offered and no combining of these offers is allowed, mark the **The Promotional Code may NOT be combined with other Promotional Codes** checkbox
20. Click the **OK** button to save these settings

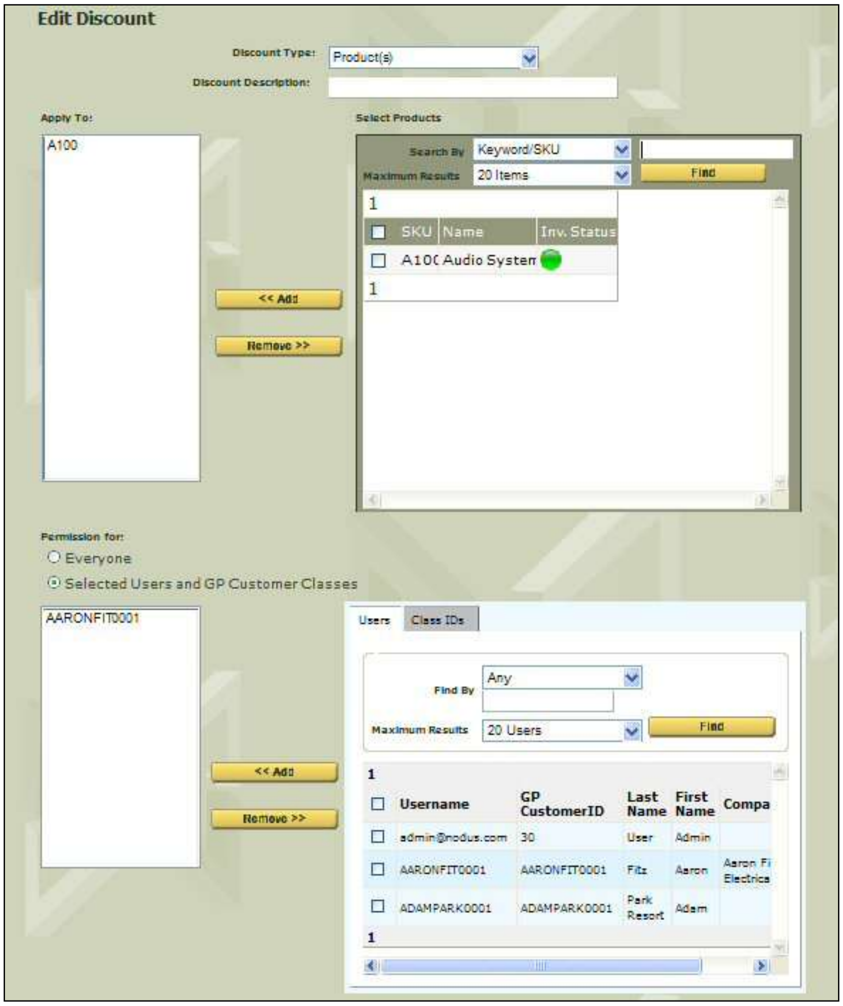


Figure 4-52 Discount by Product

Figure 4-53 Discount by Product - bottom of page

4.4.6.3. Shipping Method

A discount may be applied to reduce the shipping cost for orders meeting select parameters. The parameters for configuring a discount are the same as above. The key difference is that only the shipping charges are discounted.

1. From the **Discounts** page, click **New**
2. When the **Edit Discount** page opens, choose **Order Total** from the **Discount Type** order page
3. Enter a description of the discount in the **Discount Description** textbox
4. Choose permissions for either the **Everyone** group, or just **GP Customer Classes** and/or users selected in the following steps
5. Choose a users group by clicking the tab for:
   - **Users**
   - **User GP Class ID** - Pulls from the Great Plains users class list
6. Use search to filter a list of users
7. Mark the checkbox by the users or user classes that are eligible for the discount
8. Click the **Add** button to populate the Selected Users/Classes list
9. In the **By** field, enter a discount amount and choose a discount type
   - **Amount** - monetary discount. For example: $20 off
   - **Percent** - a percentage discount of the total
10. Enter a start and end date for the discount period

    NOTE: To make the discount open-ended, choose an end date many years in the future
11. Set a quantity start and end point for the discount by entering a number in the **If quantity is** textbox. For example, if a shopper needed to purchase three items to be eligible for the discount, then '3' would be entered here
12. Set an amount start and end point for the discount by entering a monetary amount in the **and the total is** textbox
13. If requiring a promotional code (entered during the checkout process), mark the **This discount requires a promotional code** of checkbox
14. Enter the name of the promotional code in the adjacent textbox
15. If there is a limit to the number of times the promotional code can be used for the discount, enter the amount in the **and can be used X times per customer** textbox
16. If multiple promotional codes are offered and no combining of these offers is allowed, mark the **The Promotional Code may NOT be combined with other Promotional Codes** checkbox
17. Click the **OK** button to save these settings

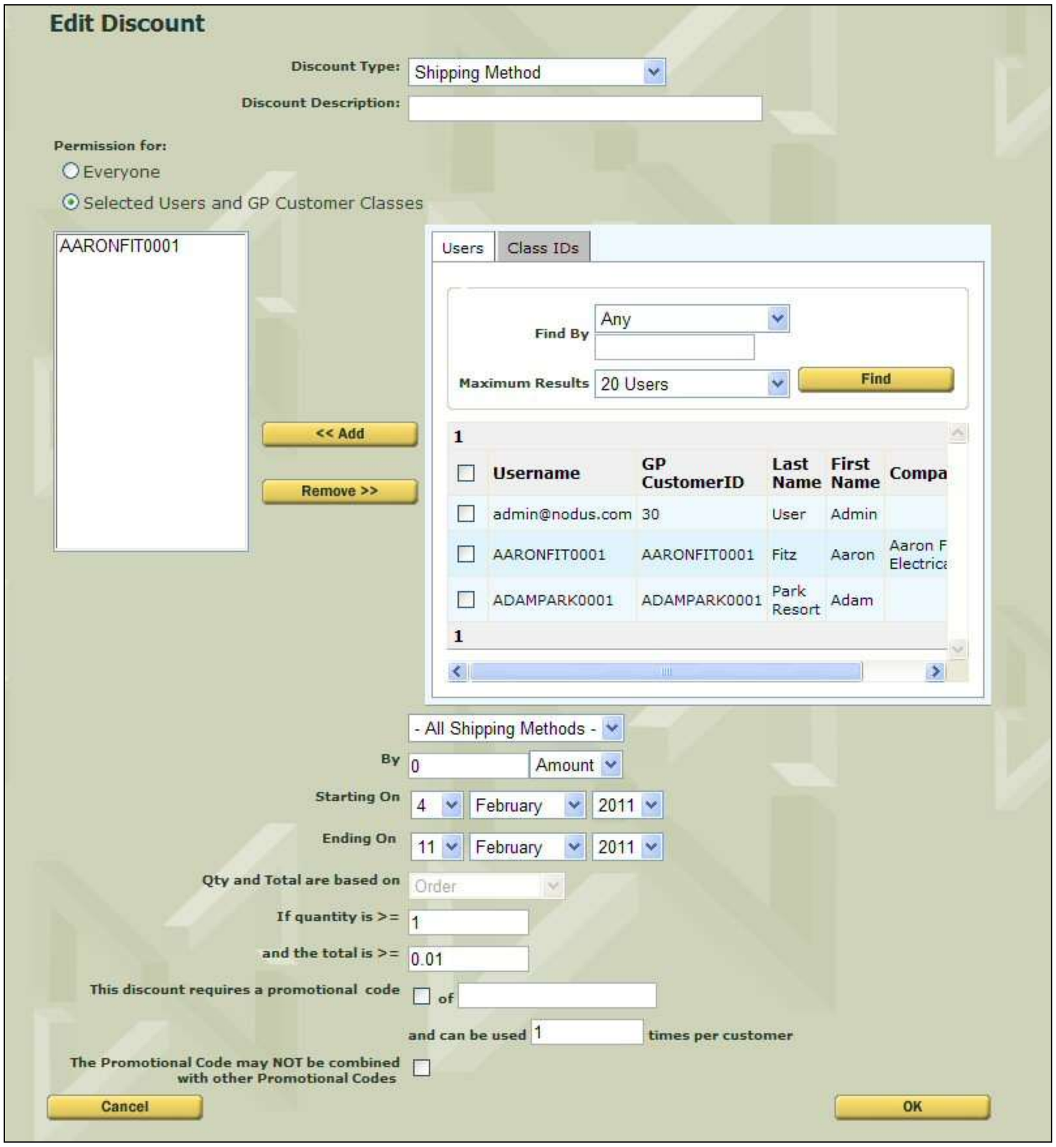


Figure 4-54 Discount by Shipping Method

4.4.6.4. Product Shipping Discount

This option allows a discount to be subtracted from the shipping cost for a specific product. The process for creating the discount is the same as discussed in the previous sections except that both a product item and a user/user group must be selected.

1. From the **Discounts** page, click **New**
2. When the **Edit Discount** page opens, choose **Order Total** from the **Discount Type** order page
3. Enter a description of the discount in the **Discount Description** textbox
4. Use search to filter a list of products
5. Mark the checkbox by the product items that are eligible for the discount
6. Click the **Add** button to populate the **Apply To** list
7. Choose permissions for either the **Everyone** group, or just **GP Customer Classes** and/or users selected in the following steps
8. Choose a users group by clicking the tab for:
   - **Users**
   - **User GP Class ID -** pulls from the Great Plains users class list
9. Use search to filter a list of users
10. Mark the checkbox by the users or user classes that are eligible for the discount
11. Click the **Add** button to populate the Selected Users/Classes list
12. In the **By** field, enter a discount amount and choose a discount type
    - **Amount -** monetary discount
    - **Percent -** percentage discount
13. Enter a start and end date for the discount period

    NOTE: To make the discount open-ended, choose an end date several years in the future.

14. Set a quantity start and end point for the discount by entering a number in the **If quantity is** textbox. For example, if a shopper needed to purchase three items to be eligible for the discount, then '3' would be entered here.
15. Set an amount start and end point for the discount by entering a monetary amount in the **and the total is** textbox
16. If requiring a promotional code (entered during the checkout process), mark the **This discount requires a promotional code of** checkbox
17. Enter the name of the promotional code in the adjacent textbox
18. If there is a limit to the number of times the promotional code can be used for the discount, enter the amount in the **and can be used X times per customer** textbox
19. If multiple promotional codes are offered and no combining of these offers is allowed, mark the **The Promotional Code may NOT be combined with other Promotional Codes** checkbox
20. Click the **OK** button to save these settings

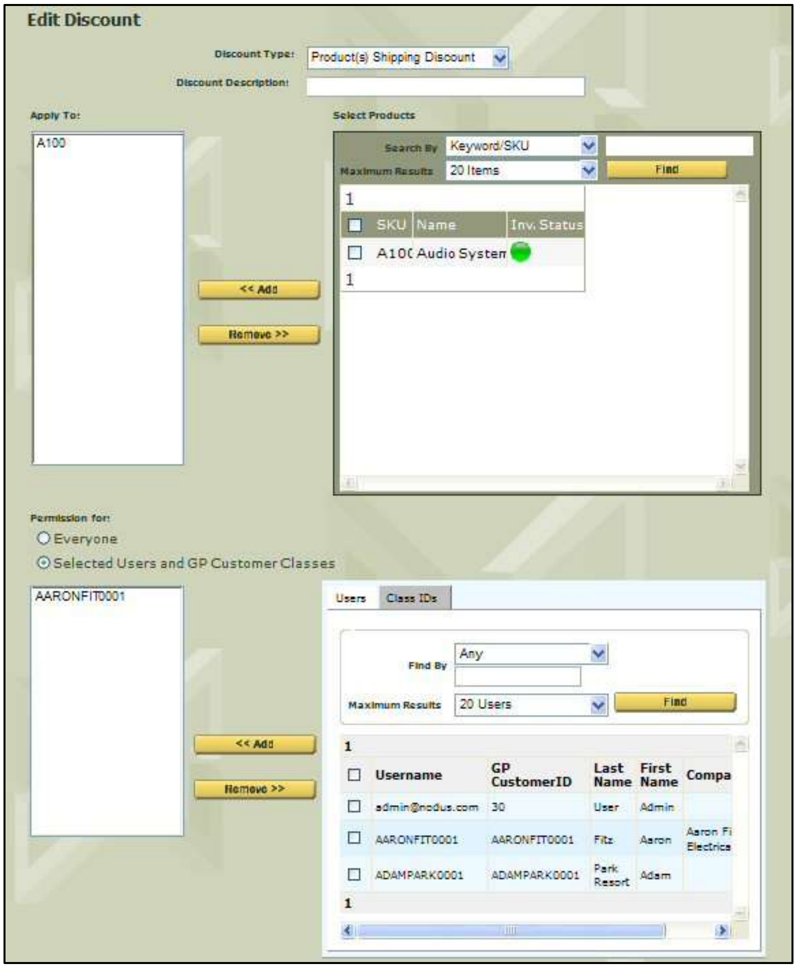


Figure 4-55 Product(s) Shipping Discount

Figure 4-56 Product(s) Shipping Discount 2

4.4.6.5. Products with Free Shipping

This option allows free shipping for a specific product item. The process for creating the discount is the same as discussed in the previous sections except that both a product item and a user/user group must be selected.

1. From the **Discounts** page, click **New**
2. When the **Edit Discount** page opens, choose **Order Total** from the **Discount Type** order page
3. Enter a description of the discount in the **Discount Description** textbox
4. Use search to filter a list of products
5. Mark the checkbox by the product items that are eligible for the discount
6. Click the **Add** button to populate the **Apply To** list
7. Choose permissions for either the **Everyone** group, or just **GP Customer Classes** and/or users selected in the following steps
8. Choose a users group by clicking the tab for:
   - **Users:**
   - **User GP Class ID:** Pulls from the Great Plains users class list
9. Use search to filter a list of users
10. Mark the checkbox by the users or user classes that are eligible for the discount
11. Click the **Add** button to populate the Selected Users/Classes list
12. In the **By** field, enter a discount amount and choose a discount type
    - **Amount:** monetary discount. For example, $20 off
    - **Percent:** a percentage discount of the total
13. Enter a start and end date for the discount period

    NOTE: To make the discount open-ended, choose an end date many years in the future
14. Set a quantity start and end point for the discount by entering a number in the **If quantity is** textbox. For example, if a shopper needed to purchase three items to be eligible for the discount, then '3' would be entered here.
15. Set an amount start and end point for the discount by entering a monetary amount in the **and the total is** textbox
16. If requiring a promotional code (entered during the checkout process), mark the **This discount requires a promotional code of** checkbox
17. Enter the name of the promotional code in the adjacent textbox
18. If there is a limit to the number of times the promotional code can be used for the discount, enter the amount in the **and can be used X times per customer** textbox
19. If multiple promotional codes are offered and no combining of these offers is allowed, mark the **The Promotional Code may NOT be combined with other Promotional Codes** checkbox
20. Click the **OK** button to save these settings

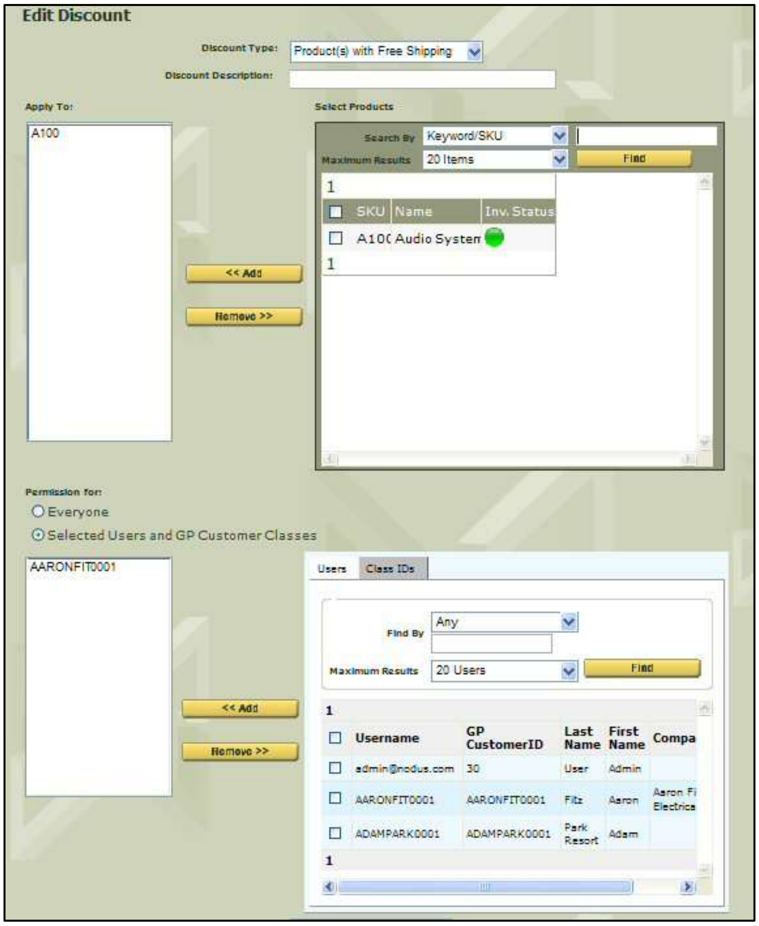


Figure 4-57 Products with Free Shipping

Figure 4-58 Products with Free Shipping 2

4.4.7. Update Inventory

Administration website location: ***Catalog*** *>* ***Update Inventory***

Typically, inventory quantities are maintained and synchronized with Great Plains. For any reason, if the eSSS admin has been set up not to use Great Plains for inventory level reference, then the admin can use the **Update Inventory** page to quickly maintain the item's available quantities. To utilize this feature:

1. Filter and search to create an inventory list
2. In the **Action** column, click the droplist arrow and choose the inventory action:
   - Add
   - Subtract
   - Set To
3. In the **Quantity** column, enter an amount in the textbox
4. Click the **Submit** button

NOTE: Clicking **Edit** on the product item allows the user to change details such as automatically updating Inventory Status when a certain quantity level is reached. See section **Catalog** > (Choose Product) > **Inventory** in this user's guide for more details.

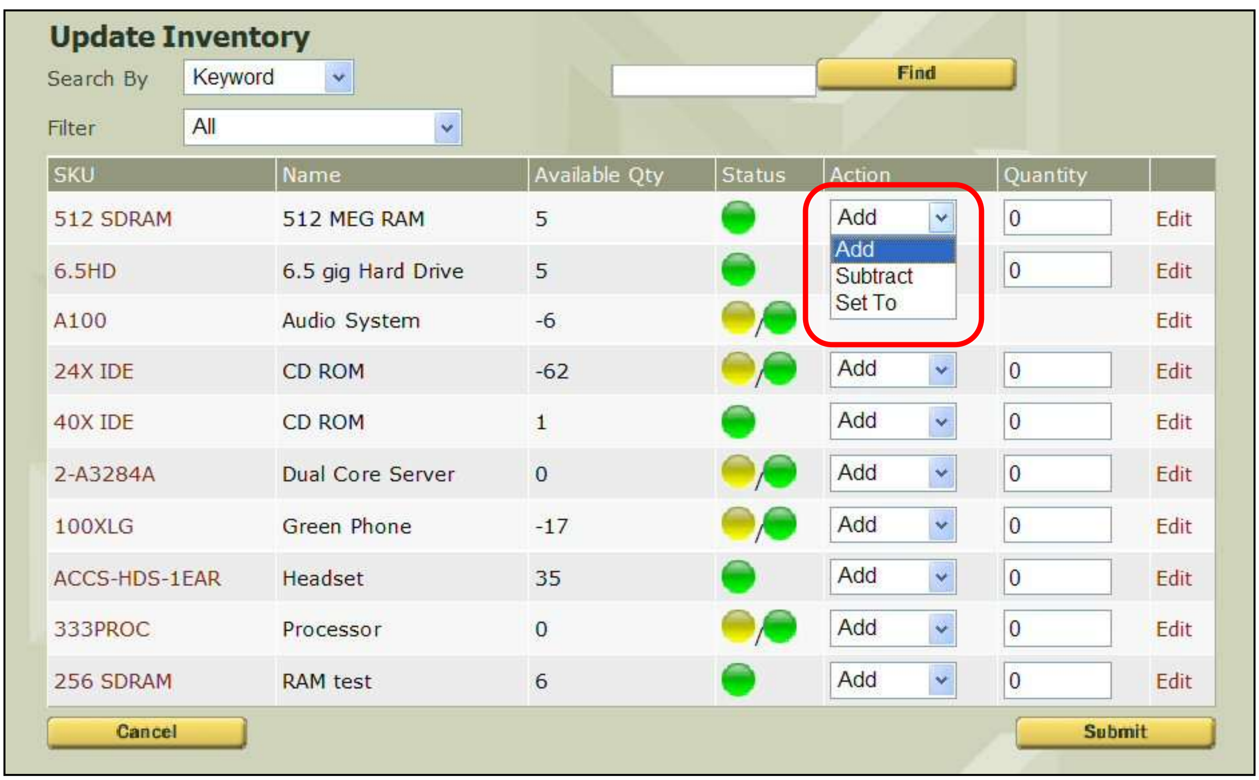


Figure 4-59 Update Inventory

4.4.8. Product Types

*Administration website location: **Catalog** > **Product Types***

In addition to the default product properties, such as short description and long description, the Product Types feature provides the ability to assign additional product properties.

A Product Type is a "template" defining the additional product properties for products. Each product is assigned with a Product Type, and inherits the product properties defined under the Product Type template. Each new product property is defined by a Type Property. Additional information on Type Properties is discussed in the next section.

Changing a product's Product Type can be done on the Edit Product page -**Catalog** > **Products** > (select the product) > click **Edit** button.

To create a new product type:

Figure 4-60 Product Type page

1. From the **Product Type** page, click the **New** button and the **Edit Product Type** page opens
2. In the **Product Type Name** field, enter a name for the new product type
3. Select any associate type properties from the **Available Properties** list and click the **<< Add** button

   NOTE: Populating the **Available Properties** list is discussed in the **Catalog** > **Type Properties** section of this document

4. Click the **Save Changes** button and the new product type will appear on the Product Type list

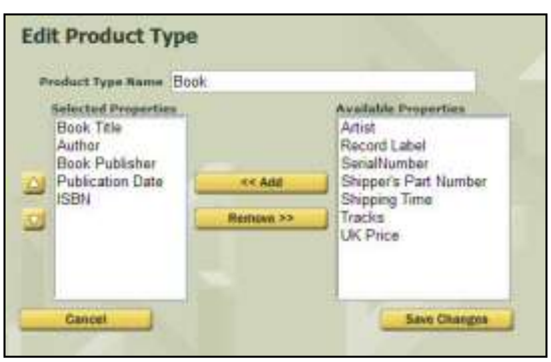


Figure 4-61 Product Type Builder

In above figure, the product type "Book" is defined by selecting from available properties as defined in the Type Properties area (additional information on Type Properties is discussed in the next section). Select the available properties from the list on the right and click the **<< Add** button to select a property for the template. As shown in below figure, the types are included in the Other Properties area of the product's General Info page. This system makes it easy to keep a consistent product creation scheme such as in an online book store providing consistent information across all products of the same type.

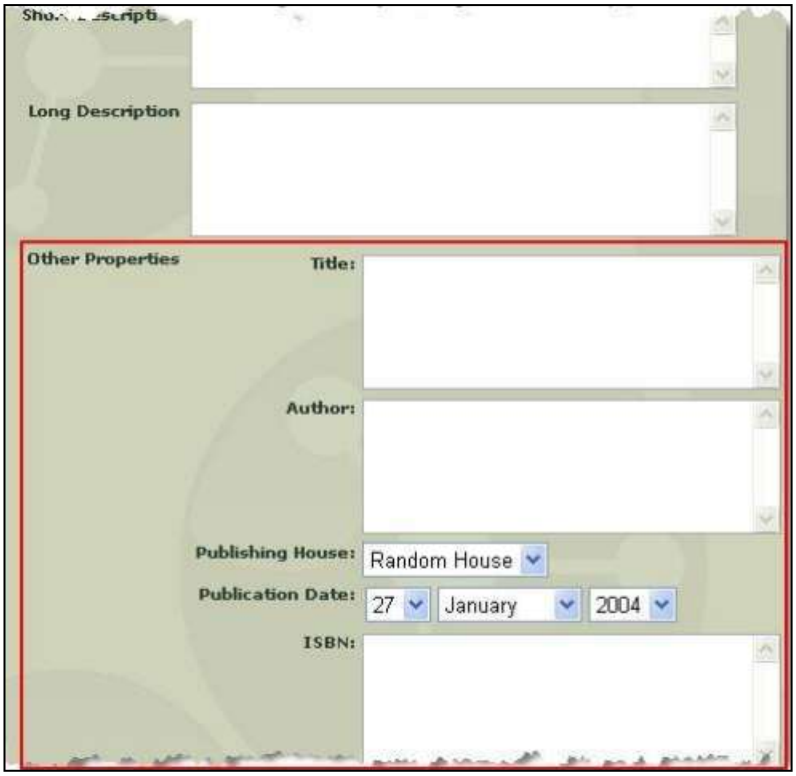


Figure 4-62 Property Types - Other Properties

4.4.9. Type Properties

*Administration website location: **Catalog >Type Properties***

Type Properties are provided to define new product properties. Type Properties are grouped by a Product Type, then the Product Type is assigned to Products that should inherit the Type Properties on the Product Type. Please refer to the previous section for more information on Type Properties.

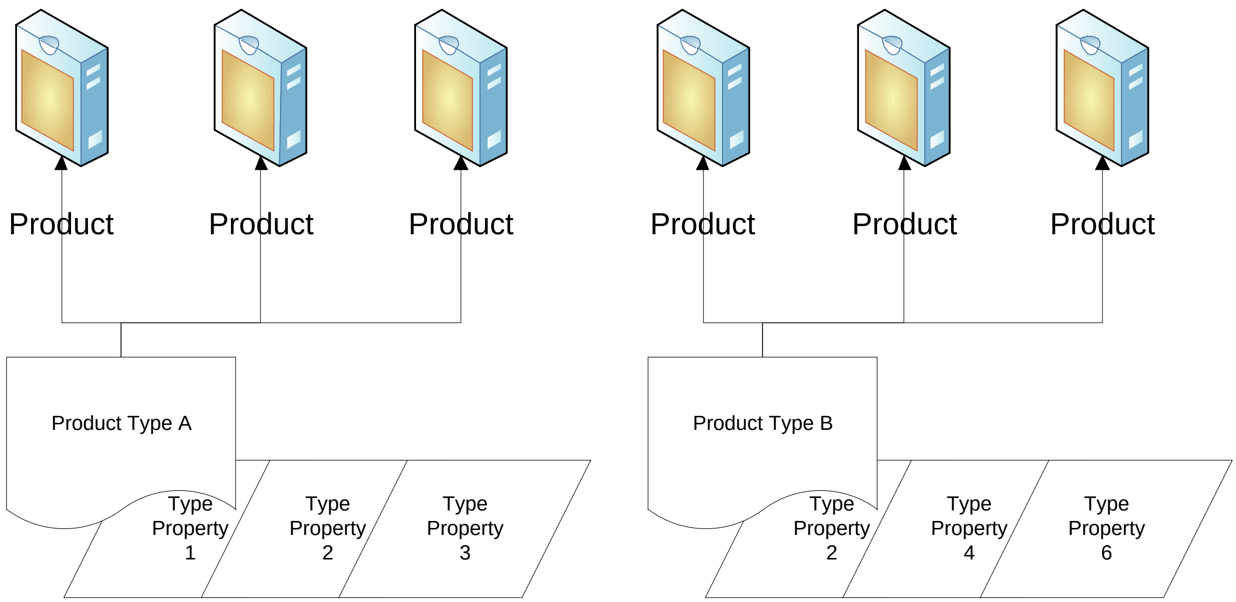


Figure 4-63 Type Properties

Type Properties allows input of extra information, such as title and author, and are then grouped into a Product Type, such as Books. After being associated with Type Properties, products are then assigned with a Product Type. **Example:** products assigned with the 'Books' Product Type could have the Title and Author fields as added properties.

Products defined with Type Properties will have the defined properties shown on the Product Detail page, as well as some of the category layouts.

Type properties can be one of four types:

- Text
- Multiple Choices
- Currency
- Date

4.4.9.1. Text

The Text property type provides the ability to enter text associated with this field in the **Other Properties** section as discussed in the **Product Type** topic. As shown in the accompanying figure, in the other properties section of creating a new product, a textbox allows the input of data. The label for the textbox will be as displayed under **Display Name** in the **Edit Type Property** page and the contents of the text box, if provided, will be populated with the Default Value. This information can be for merchant use only if clearing the **Display on Site** checkbox and this information can also be used to provide information to the drop shipper when this product is purchased.

Figure 4-64 Text Property Type

4.4.9.2. Multiple Choice

A multiple choice property type will provide a drop down selector in the other properties configuration of a new product. In the case below, the person configuring a new product will see a drop down containing shirt sizes X-Large to Small. This will not provide a selection system to the shopper; this is only for merchant configuration of a new product.

Figure 4-65 Multiple Choice Property Type

4.4.9.3. Currency

A currency property type is a field that will contain data in the type "currency" or money. In the example shown in the accompanying figure, a bonus is provided to a vendor for all orders of this particular product. The merchant can specify the bonus amount per product by using this template that will appear in the **Other Properties** area of a new product configuration. In the figure we cleared the checkbox so that this information is not displayed to the public but only provided in the information to the drop shipper and for internal use only.

Figure 4-66 Currency Property Type

4.4.9.4. Date

A date field can be used for information such as expiration date in the sample displayed in the accompanying figure. In this case we are configuring a field that will be set in a product type including this type property assigned to a new product. A default value is set however can be changed when configuring the new product.

Figure 4-67 Date Property Type

4.4.10. Manage Files

*Administration website location: **Catalog** > **Manage Files***

If you have a product that offers downloads, enter the information in the **File Download** area of the **Edit Product** configuration. You can either upload a file using the **Browse** button, or if the file is too large that it may time out during the upload process, the file can be uploaded using FTP into the "Files" folder. Choose a pre-loaded file from the droplist.

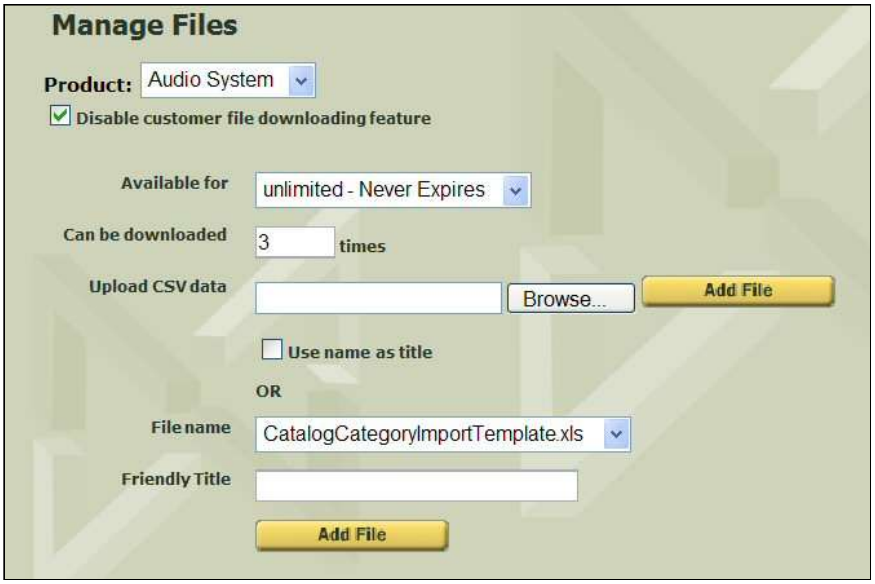


Figure 4-68 Manage Files

Enter the name you would like displayed to the customer in the "Friendly Title" field. Select the options for availability of the download after it has been purchased and the number of times it can be downloaded. If the "Available for" is set to unlimited, the quantity is bypassed.

1. Choose an item from the **Product** drop-down list
2. If already checked, unmark the **Disable Customer File Downloading** feature checkbox
3. Choose a length of time the download will be available from the **Available for** drop-down list
4. Enter a maximum quantity for downloads. Leave blank if unlimited downloads are allowed
5. Click the **Browse** button to locate a CSV data file
6. Click the **Add File** button
7. Create a title by one of three methods:
   - Mark the **Use name as title** checkbox
   - Choose a name from the **File name** drop-down list
   - Enter a working title in the **Friendly Title** textbox
8. Click the **Add File** button to make the download available on the website

4.4.11. Quick Order Product Suggestions

Administration website location: Catalog > Quick Order's Product Suggestions

Quick Order gives the ability to group products and allow them to be easily added to the shopping cart. Items can be grouped in three ways. These grouping options can be accessed in the admin section by navigating to **Catalog** > **Quick Order's Product Suggestions**.

Items from Order History – Add the number of Order History Items in the Quick Order Entry section of the webpage.

Blank Item Entry - Add the number of Blank Item Entry Items in the Quick Order Entry section of the webpage.

Product Suggestions – Search and filter items to find the products to be displayed. Choose one or more product suggestions by marking the adjacent checkbox. When finished adding products, click the **Save Changes** button.

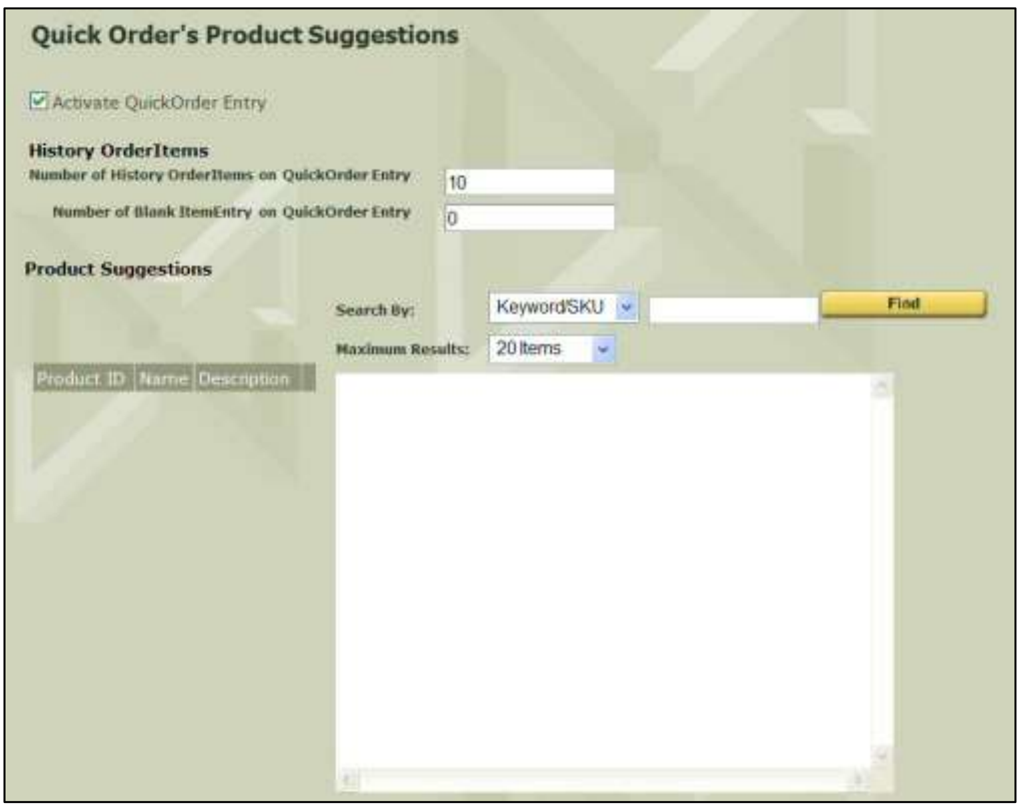
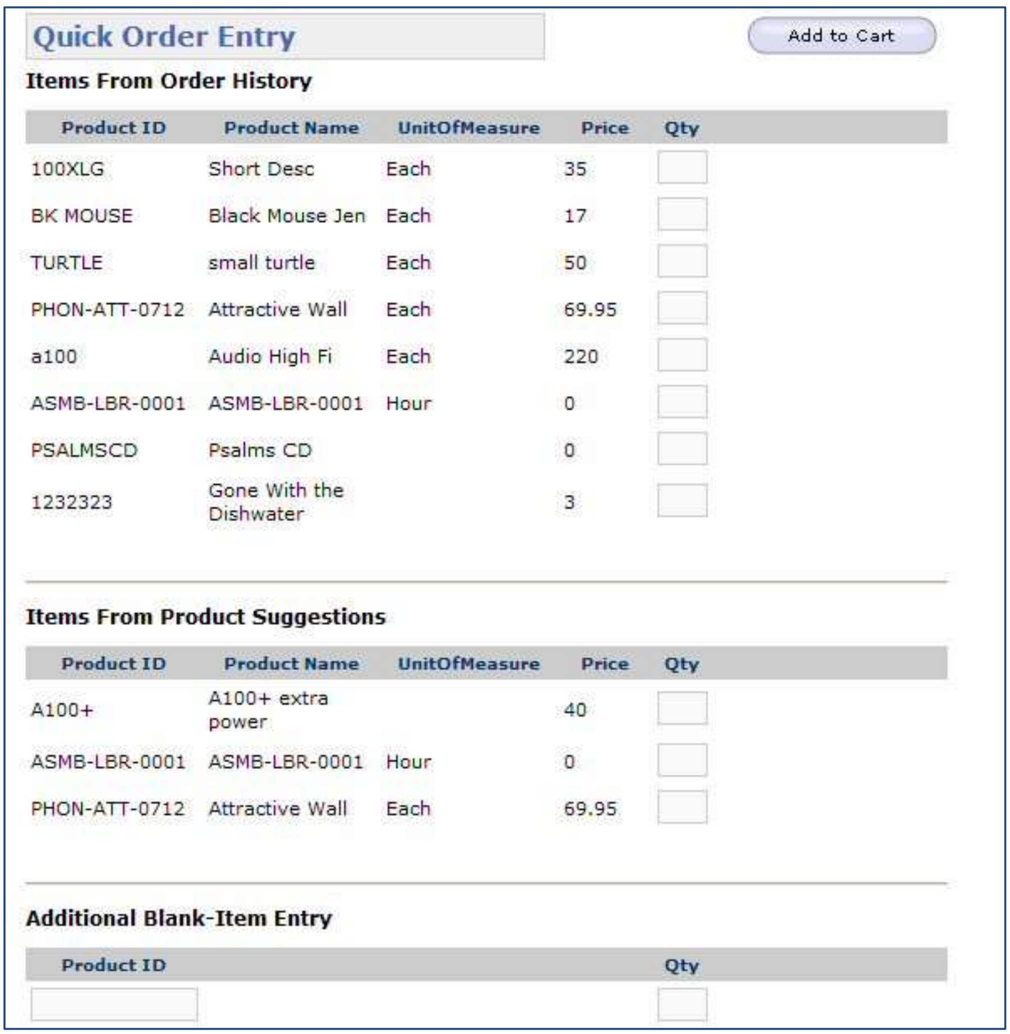


Figure 4-69 Quick Order Admin Page

4.4.11.1. Quick Order Entry Web Page Store

1. Navigate to the store home page
2. Click the **Quick Order Entry** menu link and the Quick Order page loads.
3. To order a product, enter the amount in the Qty box and click the **Add to Cart** button
4. In the Blank Order Entry page, enter a product ID or SKU number and quantity and click the **Add to Cart** button
5. Click the **Shopping Cart** link at the top of the page to view and/or order the items in the cart

NOTE: Quick Entry can also be utilized in the shopping cart. Enter the Product ID or SKU in the Product: box and type a quantity in the adjoining box, then click the **Add to Cart** button to add the product to the shopping cart.


Quick Order Entry

Add to Cart

Items From Order History

Product ID	Product Name	UnitOfMeasure	Price	Qty
100XLG	Short Desc	Each	35	
BK MOUSE	Black Mouse Jen	Each	17	
TURTLE	small turtle	Each	50	
PHON-ATT-0712	Attractive Wall	Each	69.95	
a100	Audio High Fi	Each	220	
ASMB-LBR-0001	ASMB-LBR-0001	Hour	0	
PSALMSCD	Psalms CD		0	
1232323	Gone With the Dishwater		3	

Items From Product Suggestions

Product ID	Product Name	UnitOfMeasure	Price	Qty
A100+	A100+ extra power		40	
ASMB-LBR-0001	ASMB-LBR-0001	Hour	0	
PHON-ATT-0712	Attractive Wall	Each	69.95	

Additional Blank-Item Entry

Product ID	Qty

Figure 4-70 Quick Order Entry Page

4.4.12. Item Updater

Administration website location: ***Catalog*** *>* ***Item Updater***

The item updater provides a simple method for making item updates to Great Plains and the webstore. This tool exports items from Great Plains onto a spreadsheet where changes can be made and submitted to Great Plains where the changes are shared between GP and the webstore.

1. Start by choosing an export option, such as all products or refine the export by choosing a category or catalog option

Figure 4-71 Import - Export Products

2. When the page loads with the selected option, as shown in the above figure, click the **Export** button to create a spreadsheet.

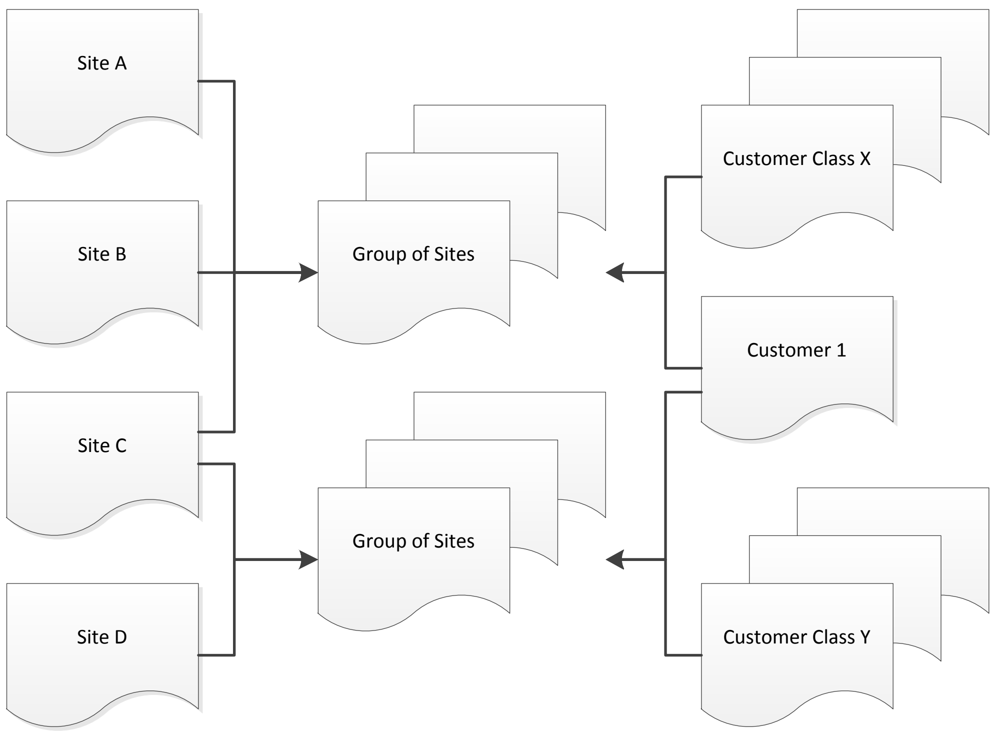
   NOTE: If a file mismatch message appears, ignore the message and continue opening the file

3. Save the spreadsheet, make any needed item updates and re-save the document
4. Browse to find the saved spreadsheet and click the **Import** button
5. If there are any errors, such as record conflicts between Great Plains and the spreadsheet, warning messages are displayed on the **Item Updater** page

4.4.13. Customer Specific Sites

*Administration website location: **Catalog** > **Customer Specific Sites***

This feature is an added functionality to the optional Multi-Site Distribution module to allow administrator to setup site restrictions by user groups. Administrators can create site groups that are linked with customers and inventory sites that determines which sites customers can purchase from. While this page provides the methods to set up site restrictions, the setting to enable the functionality is located at **Settings** > **Inventory Settings** > **Multi-Site Distribution**, and must be enabled before the setup starts taking effect.



SETUP OVERVIEW: Group sites into Site Groups, then utilize the Site Groups to assign permissions to customers. The assignment can be a mix of Customer records and Customer Classes – example: "Customer Class X" as well as "Customer 1" can be assigned to allow purchase from a Group. Each Customer record and Customer Class can be granted permissions to multiple Site Groups. Site Groups can be assigned to "Everyone" to allow all customers to place orders against sites within the Site Group.

4.4.13.1. Setting up a New Group Site

1. From the **Customer Specific Sites** page, create a site group by entering a descriptive name in the **Site Group Description** textbox
2. Click the **New** button and the new group appears on the master list of site groups
3. Mark the checkbox by the desired site group and click the **Edit** button for either the **Site Group Sites** or the Site **Group Users**

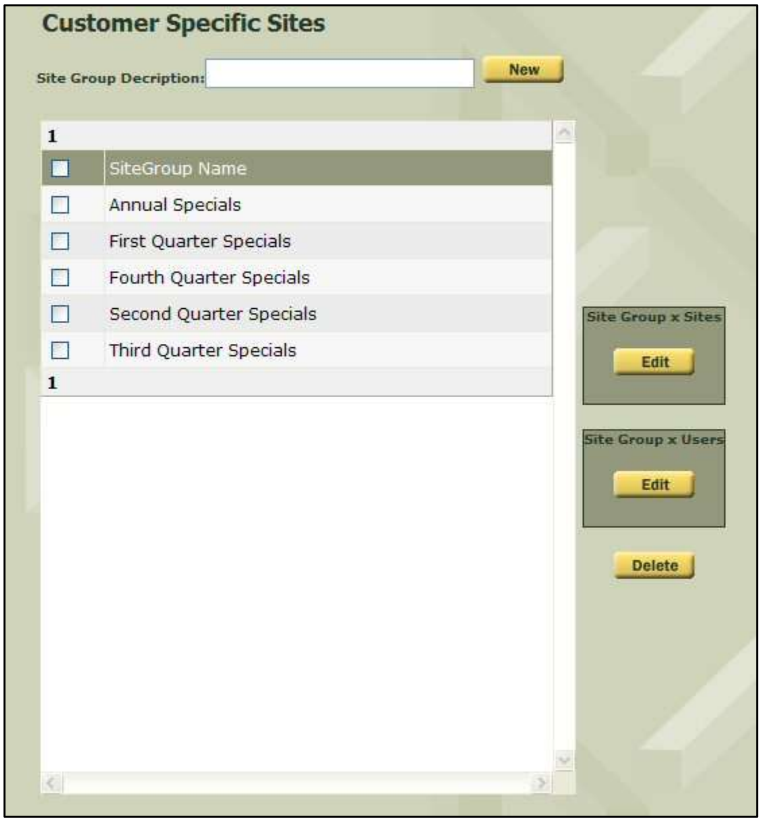


Figure 4-72 Creating Site Groups

4.4.13.2. Setting up Inventory Locations for a Site Group

1. Click the **Edit** button in the **Site Group Sites** box to specify the sites for the group.
2. When the Edit Site Group Sites page opens, mark the checkboxes by the sites to be linked with the site group.

   NOTE: Sites are imported from GP onto this list by navigating to **Settings** > **Nodus/Great Plains** > **Order Options > Import site information** and clicking the **Run Now** button.

3. Mark the checkbox(es) for as many sites as needed and click the Add button
4. Click the **OK** button to save the selections and return to the **Customer Specific Sites** page

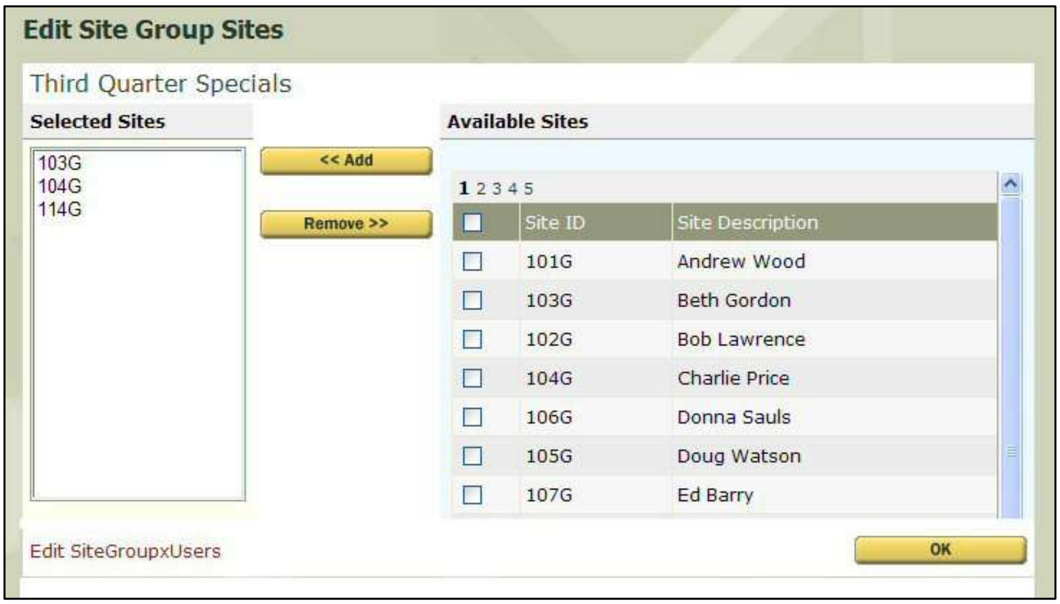


Figure 4-73 Edit Site Group Sites

4.4.13.3. Setting up Users/Class IDs for a Group Site

1. From the **Customer Specific Site** page, mark the checkbox for the same site group chosen for site locations and click the **Site Group Users Edit** button
2. When the **Edit Site Group Users/GP Class ID** page opens, there are three options to select users and/or class IDs
   a) To choose from all users and class IDs available in GP, mark the **Everyone** checkbox to select all users and class IDs available from GP
   b) To choose from a list of users, mark the **Users** radio button
      i. Mark the checkbox by the desired users
      ii. Click the **Add** button to migrate the chosen users to the Selected Users/Classes window
   c) To choose from a list of class IDs, mark the **User GP Class ID** radio button
      i. Mark the checkbox for one or more class IDs
      ii. Click the **Add** button to move the chosen class IDs to the Selected Users/Classes window
3. Click the **OK** button to save the selections and return to the **Customer Specific Sites** page

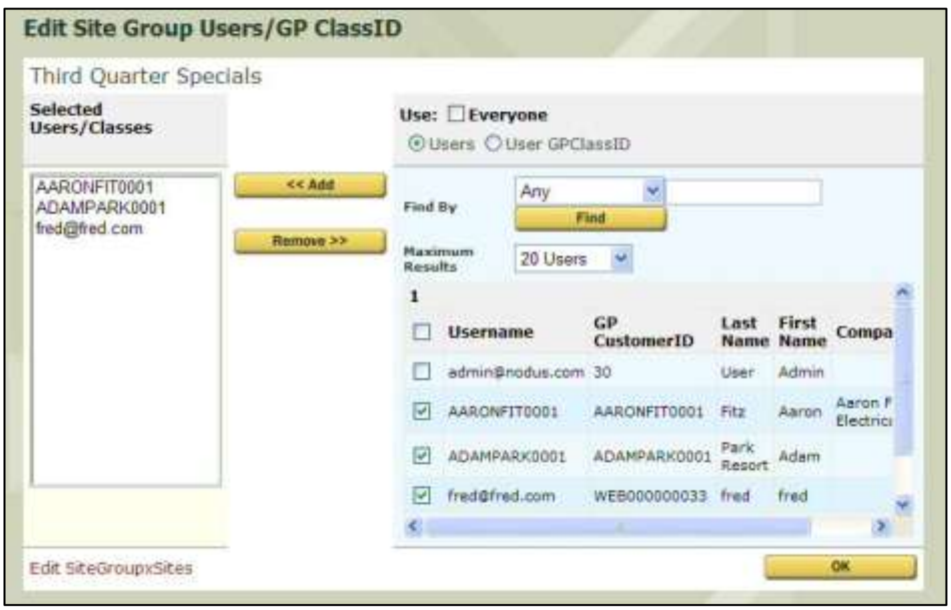


Figure 4-74 Edit Group Site Users

4.4.14. Product Tax Code

*Administration website location: **Catalog** > **Product TaxCode***

This feature is an added functionality used when working with third party tax tools (Avatax and Sabrix) that allows an administrator to view the assigned tax code of product. Tax code comes from GP with item importing. For Avatax, an administrator may map a file at GP as the source of tax code.

4.5. People

4.5.1. Users

*Administration website location: **People** > **Users***

This section will explain settings related to eSSS users. An eSSS user can be either:

- An imported customer from Customer List in GP
- A customer created directly from the website

NOTE: A user can also be a role-assigned administration user on the Web Store.

Users are "people" that have rights to assigned areas of eSSS just like Windows accounts. A user can have rights to view/access selected areas and can be used to limit employee access to select areas to perform their duties and disallow access to areas they are not permitted to view.

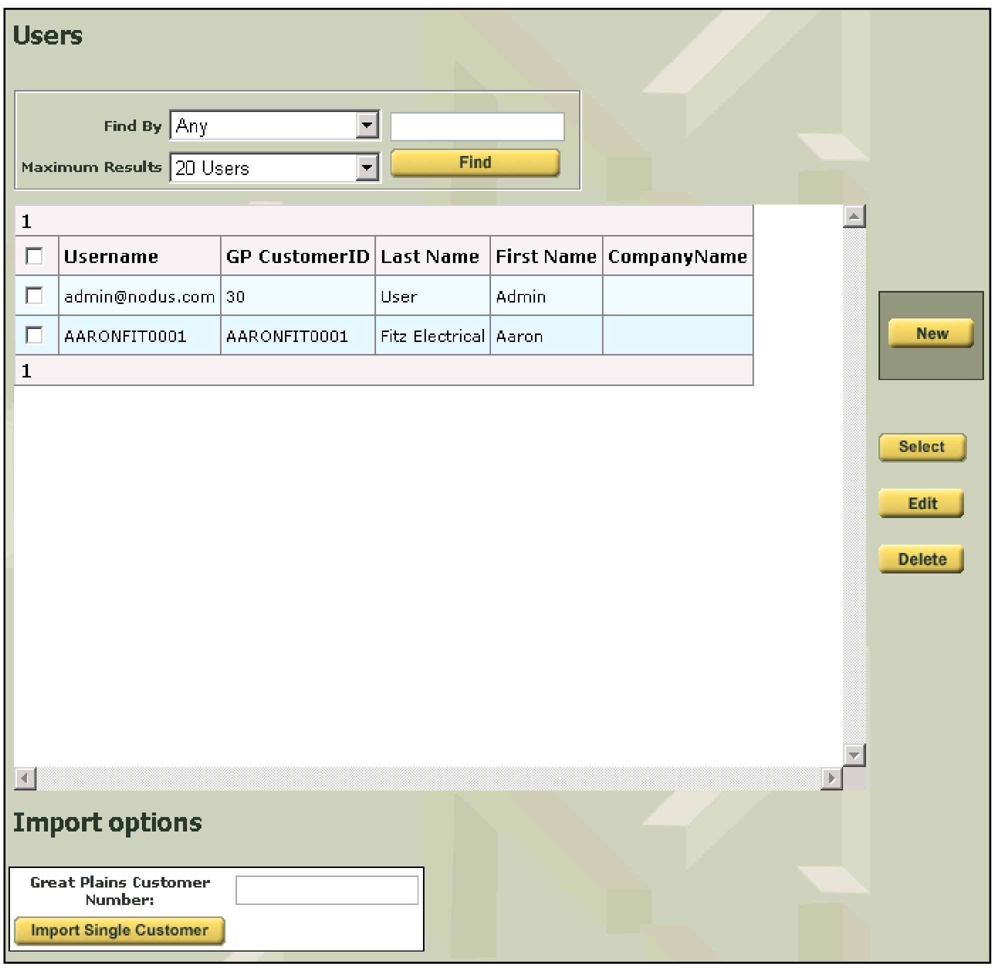


Figure 4-75 List of User Accounts

NOTE: You may also use the import feature on the user's page to import individual customers from Great Plains into the shopping cart. This is primarily used as a test to verify that the Nodus Synchronizer is working. The Synchronizer's job is to automatically send data back and forth between Great Plains and eSSS.

IMPORTANT: Customer and inventory deletions in Great Plains are not automatically synchronized with the store site, and must be manually removed using the website's Admin User interface.

4.5.1.1. Create a New User

1. Click the **New** button from the Users page to create a new user
2. When the **Create New User** page opens, enter the contact and password information
3. Click **OK**. The new user account will appear on a list of users on the **Users** page

4.5.1.2. Assign Rights to a New User

1. After creating a new user, assign their "rights" by assigning roles to each user.
2. In the list of user accounts, mark the checkbox for the user to be assigned roles
3. Click the **Edit** button
4. The **Edit User** page opens. If created in GP, the user may have certain information displayed depending on how rights were assigned in GP.
5. In the Roles section, highlight a pre-defined role (role creation is discussed in the following section) in the **Not A Member Of** box
6. Click the **Add** button and the role will be assigned to the user

   NOTE: Roles can be deleted by highlighting a role in the **Member Of** box and clicking **Remove**

7. Click **Save Changes** to make the new role(s) permanent

Figure 4-76 Edit User - Assigning Roles #2

4.5.1.3. Allow a CSR/Salesperson to Use a Customer Account

This feature allows an employee to work on behalf of a customer by granting them use of the customer account. When authorized, the employee can place orders on behalf of the customer. To enable this feature:

1. From the main user list, mark the checkbox by the designated employee
2. Click the **Select** button
3. A message box opens on the **Users** page indicating that the user can now place orders for the customer

4.5.1.4. Assign Pricing Levels to Users

Users can also be edited to assign pricing levels. Pricing levels are brought in from Great Plains when the first product is imported. A sales person can also be assigned to each user, when that user places an order the sales person will be notified by e-mail.

4.5.1.5. Restrict Salesperson Account Access

When implemented, this feature will only allow a Salesperson to see and manage only the accounts assigned to their Sales ID. To activate this function:

1. From the main user list on the **Users** page, mark the checkbox by the designated salesperson
2. Click the **Edit** button
3. Just above the **Roles** section, enter the user's GP Salesperson ID in the **I'm a salesperson with GP Salesperson ID** textbox
4. Click the **Save Changes** button

4.5.1.6. Editing and Deleting Users

When editing a user, contact information can be modified, e-mail addresses added, pricing levels set and roles assigned. To edit a user:

1. From the **Users** page, filter the list to show the desired user
2. Mark the checkbox for the user
3. Click the **Edit** button and the **Edit User** page opens
4. Make any changes needed
5. Mark the **Save Changes** button to make the changes permanent

NOTE: To delete a user; from the master user list, mark the checkbox by the desired user and click the **Delete** button.

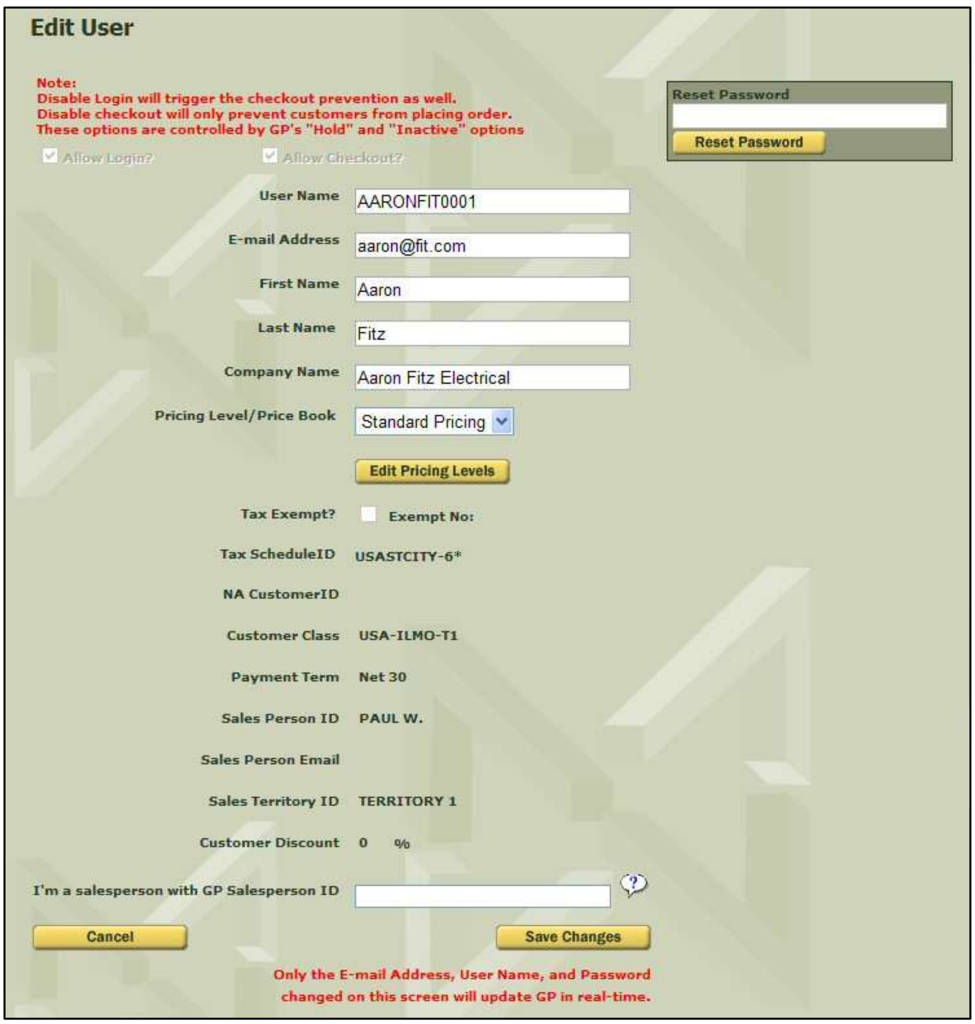


Figure 4-77 Editing User Information

4.5.1.7. Adding and Editing User Addresses

Often, users and customers will have multiple addresses for satellite offices, warehouses, etc. These addresses are added and edited from the Addresses section at the bottom of the **User** page.

To add an address:

1. Navigate to **Users** > (*select and edit a user from main list*) > **Edit User**
2. In the Addresses section, click the **New** button
3. When the **Edit User Address** page opens, add information to the address form as needed
4. Click the **OK** button
5. Repeat for as many additional addresses needed for the user account

To edit an address:

1. Navigate to **Users** > (*select and edit a user from main list*) > **Edit User**
2. In the **Addresses** section, click the **Edit** button
3. When the **Edit User Address** page opens, change information as needed
4. Click the **OK** button

To delete an address:

The primary address is located in GP and cannot be deleted. Other addresses created in eSSS must be manually deleted from the appropriate GP database.

NOTE: Additional information that is related to the user account, such as tax and shipping information is displayed. This additional information can be edited from GP.

Figure 4-78 Add and Edit User Addresses

4.5.2. Roles

*Administration website location: **People** > **Roles***

eSSS allows specific roles to be created and assigned to users. A list of these users is maintained and can be edited from the master list.

4.5.2.1. Creating a User Role

1. Enter the role designation in the **New Role Name** textbox
2. Click the **New** button
3. The new user role appears in the role list as shown in the accompanying figure

Figure 4-79 Roles

4.5.2.2. Assigning Permissions to the Role

1. Highlight the user role from the role list
2. Click the **Edit** button
3. When the **Edit Role** page opens, mark the checkboxes by the permissions to be assigned to the role as shown in the accompanying figure below
4. Click the **Save Changes** button

4.5.2.3. Assigning Users to the Role

1. Highlight the user role from the role list
2. Click the **Edit** button
3. When the **Edit Role** page opens, use the search function to create a user list

4. Mark the checkboxes by the users to be assigned permissions for that role
5. Click the **Save Changes** button

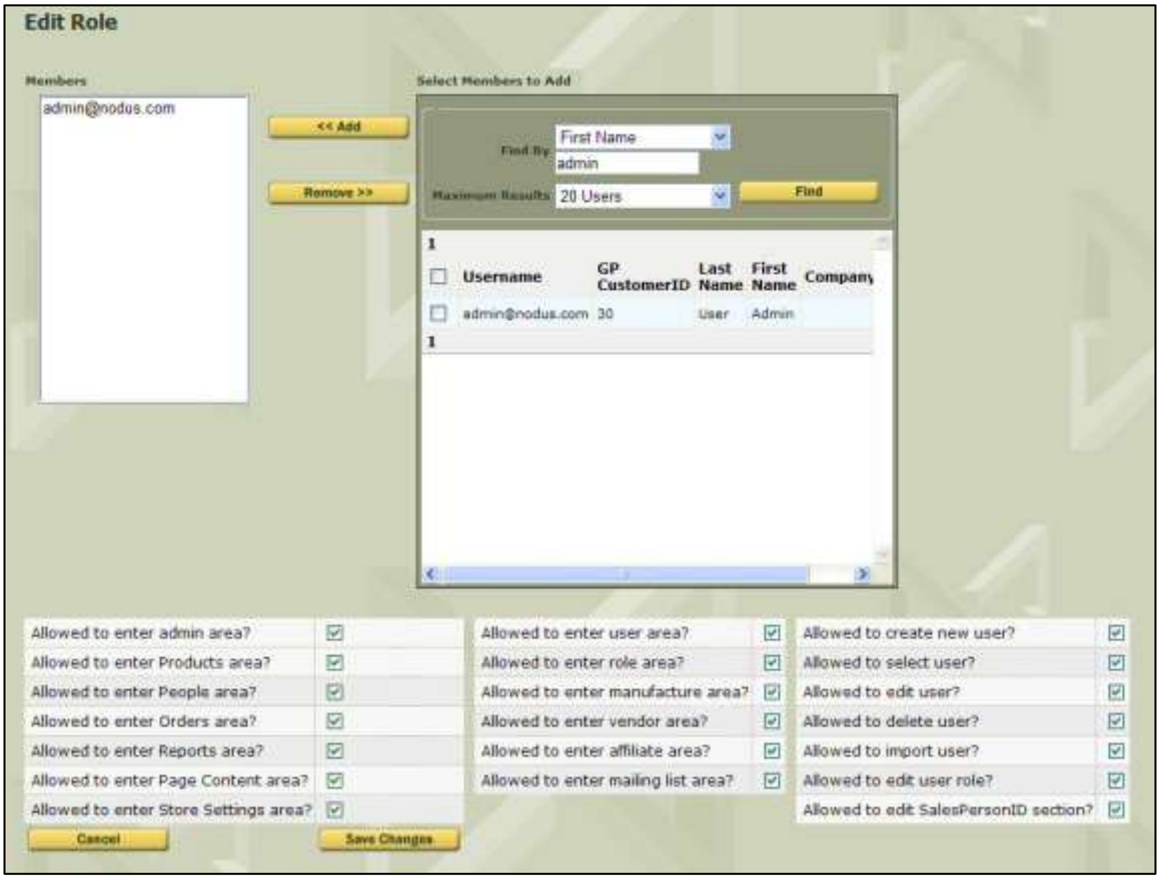


Figure 4-80 Edit Roles

4.5.3. Manufacturers

*Administration website location: **People >Manufacturers***

By clicking the **Manufacturers** menu item on the left side of the **People** area, you can view a list of available manufacturers. Click the **Edit** next to the manufacturer listed to view their information as shown in the figure shown below, or click **New** to add new manufacturers.

Figure 4-81 List of Manufacturers

Manufacturers are assigned to a product along with Section "Vendors" to track sales data and provide e-mail order notifications to products in which they are assigned.

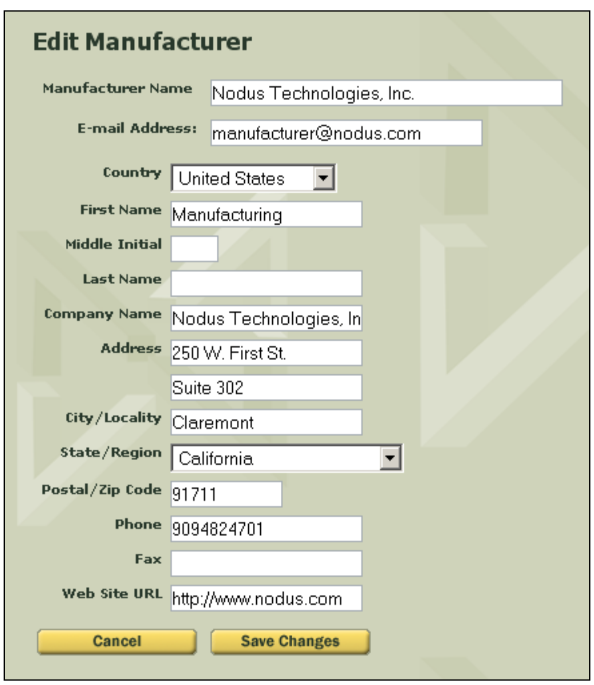


Figure 4-82 Manufacturers

4.5.4. Vendors

Administration website location: ***People*** *>* ***Vendors***

Vendors, like the manufacturers section, are associated as a distributor for a product and will receive notifications of orders for products sold in which the vendor is assigned. Click the filter row to filter vendors by the first letter of the vendor name, in the example above; clicking the letter N would filter to the single vendor listed.

NOTES:

- Click the **Edit** button to make changes to Vendor information
- To import vendors from Great Plains, click the **Import Vendors** button

Figure 4-83 Vendor List

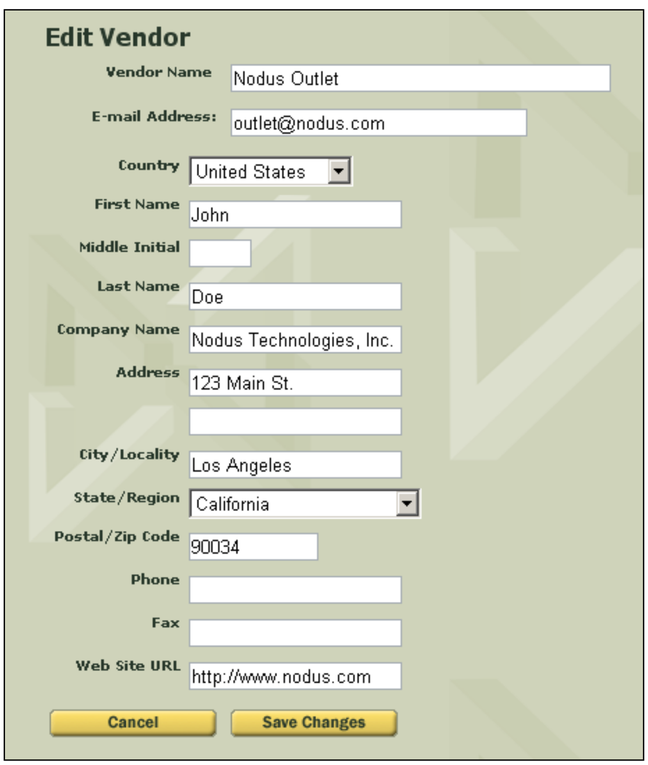


Figure 4-84 Add/Edit Vendor Screen

4.5.5. Affiliates

*Administration website location: **People** > **Affiliates***

eSSS provides two main methods to create webstore affiliates:

- Affiliates can be manually created from **People** > **Affiliates**
- In **Settings** > **Affiliates**, a webstore sign-up form from the Customer Service page can be enabled that will automatically populate the Affiliates list

The list of affiliates can be viewed from **People** > **Affiliates**.

Figure 4-85 Affiliate List

Figure 4-86 Creating Affiliates

4.5.5.1. Configuring a New Affiliate

1. Enter a website URL for the affiliate

   NOTE: The affiliate can use any URL to the store that contains the parameter as specified in Settings...Affiliates under "Affiliate ID QueryString name". The default is "affid" therefore the affiliate could provide a link to the site such as http://www.yourstore.com/default.aspx?affid=yourid (replace 'your id' with the affiliate ID. In the accompanying figure it is shown as "1"). Another way to pass in a query string parameter without specifying a page: http://www.yourstore.com/?affid+youraffid.

2. Set the commission type; percentage of sale or flat rate commission

3. Enter the referral days - this value is the number of days a cookie will persist such that a shopper that uses the affiliate link to visit the store can return to the store at a later time without using the affiliate link and the affiliate will still get credit for the sale.

   NOTE: Refer to **Settings** > **Affiliate** to set how to resolve the conflict when shoppers use more than one affiliate link to visit the store. The **Affiliate Conflict Resolution** droplist on this page establishes two choices for which affiliate gets for the referral:

   - Favor old affiliate:
   - Favor new affiliate:

4. Enter affiliate information as needed. The following fields are required:

   - Address Name
   - First Name
   - Last Name
   - Address
   - City
   - Postal Code
   - Phone Number

5. Click the **OK** button

4.5.6. Mailing Lists

*Administration website location: **People** > **Mailing Lists***

Mailing lists help the user keep in touch with customers using promotions such as discounts, newsletters, etc.

4.5.6.1. Private and Public Mailing Lists

eSSS also can make mailing lists private so that merchants can control subscription lists such as public shopper versus a VIP customer list. A shopper must be signed in to subscribe to a mailing list. When signed in, a shopper can visit their **My Account** section of the store and click the Mailing Lists link to subscribe as shown in webstore screenshot.

To view available mailing lists for the store, navigate to **People** > **Mailing Lists** as shown below in the figure:

Figure 4-87 Mailing Lists Available

4.5.6.2. Adding a New Mailing List Entry

To create a new mailing list, enter the name for the mailing list then click **New**. If the mailing list is for internal use only, mark the **Private** checkbox.

4.5.6.3. Adding to/Editing the Mailing List:

Users can easily subscribe to Public mailing lists as shown in the figure below by clicking the **Subscribe** button. Subscribers can be viewed or members added/removed by clicking the **Edit** button. When clicking **Edit**, the **Edit Mailing List** screen appears as shown in the accompanying figure.

In the accompanying figure, the new "Store Mailing List" doesn't have any subscribers as the store isn't open yet. Users listed in the search dialog in the lower right can be added as needed in other admin areas. Check the checkboxes to the left of each user to add then click the **Add** button to instantly add the selected users to the mailing list. No further commands are needed.

Figure 4-88 Mailing Lists as shown on webstore

Figure 4-89 Edit Mailing List

4.5.6.4. Sending E-mails to the Mailing List:

1. When ready to send a message return to the Mailing Lists screen
2. Click the **Email** button adjacent to the desired user/mailing list name
3. When the Send Email to List page opens, specify if the message will be a Text or HTML e-mail message
4. Add a subject and enter a message
5. Click the **Email** button to send the e-mail

4-90 Select a Mailing List name for E-mailing

Figure 4-91 Send E-Mail to List

4.5.7. Gift Certificate Search

*Administration website location: **People** > **Gift Certificate Search***

Setting up Gift Certificates:

There are two ways to enable the Gift Certificate feature. The method used depends on the inventory policy preferred by the user.

- Enter gift certificates into Great Plains as an inventory item. If this is the procedure being used, then the **Send in Gift Certificate as a Non-Inventory Item?** checkbox located in **Settings** > **Gift Certificates** must be marked
- If gift certificates are not registered in Great Plains as an inventory item, the **Send in Gift Certificate as a Non-Inventory Item?** checkbox must be unmarked.

NOTE: If gift certificates are tracked in Great Plains and the **Send in Gift Certificate as a Non-Inventory Item** checkbox is unmarked, the gift certificate option can be viewed, but not successfully processed.

Figure 4-92 Gift Certificate Search

4.6. Content

4.6.1. Home Page Content

*Administration website location: **Content** > **Homepage***

The Homepage Content designer is a runtime designer to build content blocks for display on the home page. Using this runtime designer allows for making updates to the content without any need to edit physical files of the website.

As shown in the figure below, the home page consists of three columns where content block elements can be placed.

Figure 4-93 Homepage Content Sample Layout

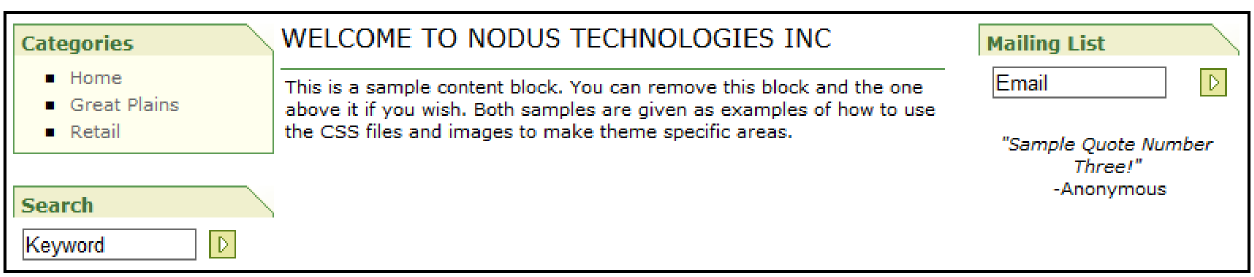


Figure 4-94 Homepage Content as Viewed on Store

Please refer to chapter 4.6.4 below for details on each of the content blocks.

4.6.2. Category Page

Administration website location: ***Content*** *>* ***Category Page***

The Category Page content designer is a runtime designer to build content blocks for display on the category page. Using this runtime designer allows for making updates to the content without any need to edit physical files of the website.

The content designer is used to build the left side column of a category page, while the main body (right side column) of the page is controlled by the category properties.

As shown in the figure below, the content designer allows placing content block elements on the left column of the page.

Figure 4-95Category Page Side Content Sample Layout

Figure 4-96 Category Page Content as Viewed on Store

Please refer to chapter 4.6.4 below for details on each of the content blocks.

4.6.3. Product Page

*Administration website location: **Content** > **Product Page***

The Product Page Side Content designer is a runtime designer to build content blocks for display on the product details page. Using this runtime designer allows for making updates to the content without any need to edit physical files of the website.

The content designer is used to build the left side column of a product details page, while the main body (right side column) of the page is controlled by the product properties.

As shown in the figure below, the content designer allows placing content block elements on the left column of the page.

4-97 Product Page Side Content Designer

4-98 Product View on Store

Please refer to chapter 4.6.4 below for details on each of the content blocks.

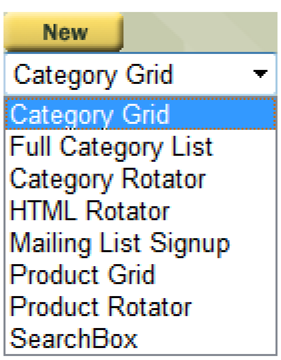
4.6.4. Content Blocks

*Administration website location: **Content** > **Home Page, Category Page, and Product Page***

Content blocks are used on the Home Page, Category Page, and Product page content designers to add elements to each of the corresponding pages (see chapter 4.6.1, 0, and 4.6.3 above).

Click the Up or Down arrows on each content block element to move it up or down in order. Click on its **Edit** button to configure the settings for the corresponding content block. Click the **Delete** button to remove the content block.

On the content designer, available Content Block elements are listed in the drop down list above each of the columns that are available for configuration. Select a Content Block element you wish to add, then click the **New** button to add any of the Content Block elements.



Please refer to chapter 4.6.4 above for details on each of the content blocks.

4.6.1.1. Category Grid

*Administration website location: **Content** > **Home Page, Category Page, and Product Page***

The Category Grid content block element will display links to the selected category in a grid based off the number of columns assigned to the content block. If the category is assigned with an Icon Image, the category's icon image is also displayed with the link.

To add a new Category Grid content block element, follow the steps below:

1. Select **Category Grid** from the drop down list above the column where the content should be placed
2. Click the **New** button
3. Set the number of columns to display the categories. Number of categories exceeding the Grid Columns would wrap to the next row and continue to display in additional rows until all categories are displayed.

Figure 4-99 New Category Grid

4. Click the **OK** button to save the new Category Grid content block

The figure "Category Grid Element" below shows the new category list we just created in the center column of our homepage content.

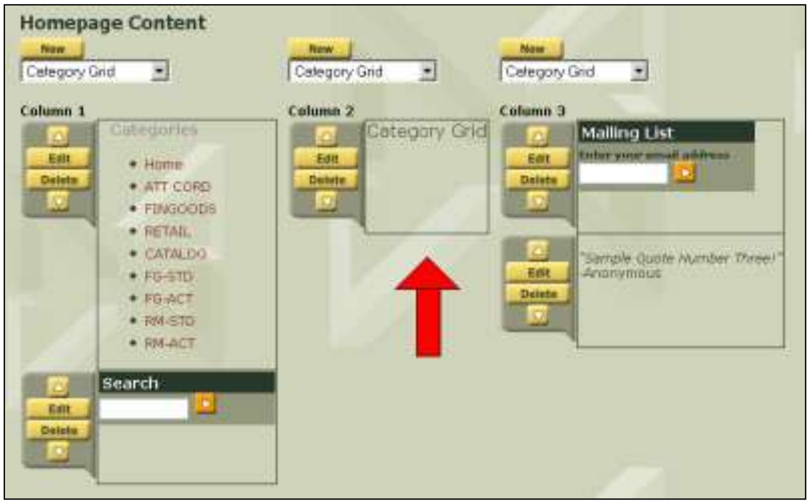


Figure 4-100 Category Grid Element

To configure a Category Grid content block element and set the categories you wish to display, follow the steps below:

1. From the content designer page, click the **Edit** button next to the Category Grid content block
2. Click the **New** button to add a new category to the Category Grid
3. Select a category from the drop down list
4. Click the **OK** button to confirm
5. Click the **Edit** button next to the category if you've made a mistake to go back to category selection
6. Repeat above steps until all desired categories to display in the category grid are added. The figure "Configure Category Grid" below shows example of three categories configured to be displayed in the category grid.

Figure 4-101 Configure Category Grid

NOTE: Images can be added to the category display. These category **Icon Images** are part of Category Properties. Go to the **Category Edit** page to administrate **Category** properties and add an icon image.

7. Clicking the up and down arrows next to each category to move them up and down to the order you wish for them to be displayed
8. Click the **OK** button and complete the configuration

Figure "Category Grid on Home Page" below shows an example of the category grid displayed on the homepage. The category grid is configured to be a maximum of three columns in this example.

Figure 4-102 Category Grid on Home Page

4.6.1.2. Category Lists

Administration website location: ***Content** > **Home Page, Category Page, and Product Page***

The category lists displays a vertical list of links to categories. It dynamically expands and displays lower level categories depends as the user lands on one of the category pages.

The **Full Category List** will enable the category list to fully expand in order to show all sub-categories. With the **Category List** and **Category List 2** options, subcategories are filtered to present a shorter list to keep the customer's focus on the current category as well as preventing display of excessive long list on the screen (see Figure Category Lists Comparison).

FULL CATEGORY LIST

CATEGORY LIST

CATEGORY LIST 2

Figure Category Lists Comparison – Full Category List, Category List, & Category List 2

To add a new category list content block element, follow the steps below:

1. Select **Full Category List, Category List, or Category List 2** from the drop down list above the column where the content should be placed
2. Click the **New** button
3. Click the **OK** button to save the new content block

4.6.1.3. Category Rotator

*Administration website location: **Content** > **Home Page, Category Page, and Product Page***

A category rotator will randomly display a link of a category with each visit to the page. The link can also be accompanied by an icon image for the category. To learn about assigning images to display in a category rotator, read the Edit Category topic.

The figure "Category Rotator Live" below shows the category rotator in action on home page.

Figure 4-103 Category Rotator Live

To add a new Category Rotator content block element, follow the steps below:

1. Select **Category Rotator** from the drop down list above the column where the content should be placed
2. Click the **New** button

Figure 4-104 Creating a New Category Rotator

3. Click the **OK** button to save the new Category Rotator content block

To configure a Category Rotator content block element and set the categories you wish to display, follow the steps below:

1. From the content designer page, click the **Edit** button next to the Category Rotator content block
2. Click the **New** button to add a new category to the Category Rotator
3. Select a category from the drop down list
4. Click the **OK** button to confirm
5. Click the **Edit** button next to the category if you've made a mistake to go back to category selection
6. Repeat above steps until all desired categories to display in the category rotator are added. The figure "Configure Category Rotator" below shows example of three categories configured to be displayed in the category rotator.

Figure 4-105 Configure Category Rotator

NOTE: Images can be added to the category display. These category **Icon Images** are part of Category Properties. Go to the **Category Edit** page to administrate **Category** properties and add an icon image.

7. Clicking the up and down arrows next to each category to move them up and down to the order you wish for them to be displayed
8. Click the **OK** button and complete the configuration

4.6.1.4. HTML Rotator

*Administration website location: **Content** > **Home Page, Category Page, and Product Page***

The HTML Rotator will randomly display a HTML items with each visit to the page.

To add a new HTML Rotator content block element, follow the steps below:

1. Select **HTML Rotator** from the drop down list above the column where the content should be placed
2. Click the **New** button

Figure 4-106 Creating new HTML Rotator

3. Click the **OK** button to save the new HTML Rotator content block

To configure a HTML Rotator content block element, follow the steps below:

1. From the content designer page, click the **Edit** button next to the HTML Rotator content block
2. Click the **New** button to add a new HTML Item to the HTML Rotator
3. Make edits to the HTML content you wish to publish

Figure 4-107 Editing a HTML item

4. Click the **OK** button to confirm
5. Click the **Edit** button next to the HTML item if you've made a mistake to go back to HTML editor
6. Repeat above steps until all desired HTML items you wish to display are added. The figure "Two HTML Elements to be Rotated" below shows example of two HTML items configured that will be randomly selected to be displayed on the page

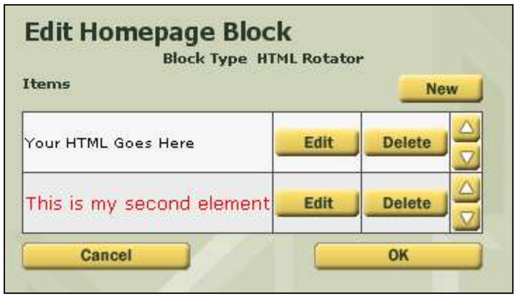


Figure 4-108 Two HTML Elements to be Rotated

7. Click the **OK** button and complete the configuration

NOTE: Rotation of HTML items is random and depends on browser cache and page views.

4.6.1.5. Mailing List Signup

Administration website location: ***Content*** *>* ***Home Page, Category Page, and Product Page***

A Mailing List Signup content block allows users to input their e-mail address, where the e-mail address will be saved to the mailing list that you have configured.

To add a new Mailing List Signup content block element, follow the steps below:

1. Select **Mailing List Signup** from the drop down list above the column where the content should be placed
2. Click the **New** button

4-109 Creating new Mailing List Signup

3. From the **Mailing List** drop down list, select the mailing list where the e-mail addresses should be saved
4. Click the **OK** button to save the Mailing List Signup content block

4.6.1.6. Product Grid

Administration website location: ***Content*** *>* ***Home Page, Category Page, and Product Page***

The Product Grid content block element will display products of your choice in a grid based off the number of columns assigned to the content block.

To add a new Product Grid content block element, follow the steps below:

1. Select **Product Grid** from the drop down list above the column where the content should be placed
2. Click the **New** button
3. Set the number of columns to display the products. Number of products exceeding the Grid Columns would wrap to the next row and continue to display in additional rows until all products are displayed.

Figure 4-110 New Product Grid

4. Click the **OK** button to save the new Product Grid content block

To configure a Product Grid content block element and set the products you wish to display, follow the steps below:

1. From the content designer page, click the **Edit** button next to the Product Grid content block
2. Click the **New** button to add a new product to the Product Grid
3. Search for the product and check the checkbox next to it
4. Click the **OK** button to confirm
5. Click the **Edit** button next to the product if you've made a mistake to go back to product selection
6. Repeat above steps until all desired products to display in the product grid are added. The figure "Configure Product Grid" below shows example of three products configured to be displayed in the product grid.

Figure 4-111 Configure Product Grid

7. Clicking the up and down arrows next to each product to move them up and down to the order you wish for them to be displayed
8. Click the **OK** button and complete the configuration

Figure "Product Grid on Home Page" below shows an example of the product grid displayed on the home page. The product grid is configured to be a maximum of three columns in this example.

4-112 Product Grid on Home Page

4.6.1.7. Product Rotator

Administration website location: ***Content*** *>* ***Home Page, Category Page, and Product Page***

A product rotator will randomly display a product with each visit to the page.

The figure "Product Rotator Content Block" below shows the product rotator in action on home page.

4-113 Product Rotator Content Block

To add a new Product Rotator content block element, follow the steps below:

1. Select **Product Rotator** from the drop down list above the column where the content should be placed
2. Click the **New** button

Figure 4-114 Creating a New Product Rotator

3. Click the **OK** button to save the new Product Rotator content block

To configure a Product Rotator content block element and set the products you wish to display, follow the steps below:

1. From the content designer page, click the **Edit** button next to the Product Rotator content block
2. Click the **New** button to add a new product to the Product Rotator

3. Search for the product and check the checkbox next to it
4. Click the **OK** button to confirm
5. Click the **Edit** button next to the product if you've made a mistake to go back to product selection
6. Repeat above steps until all desired products to display in the product rotator are added. The figure "Configure Product Rotator" below shows example of three products configured to be displayed in the product rotator.

Figure 4-115 Configure Product Rotator

7. Clicking the up and down arrows next to each product to move them up and down to the order you wish for them to be displayed
8. Click the **OK** button and complete the configuration

4.6.1.8. Search Box

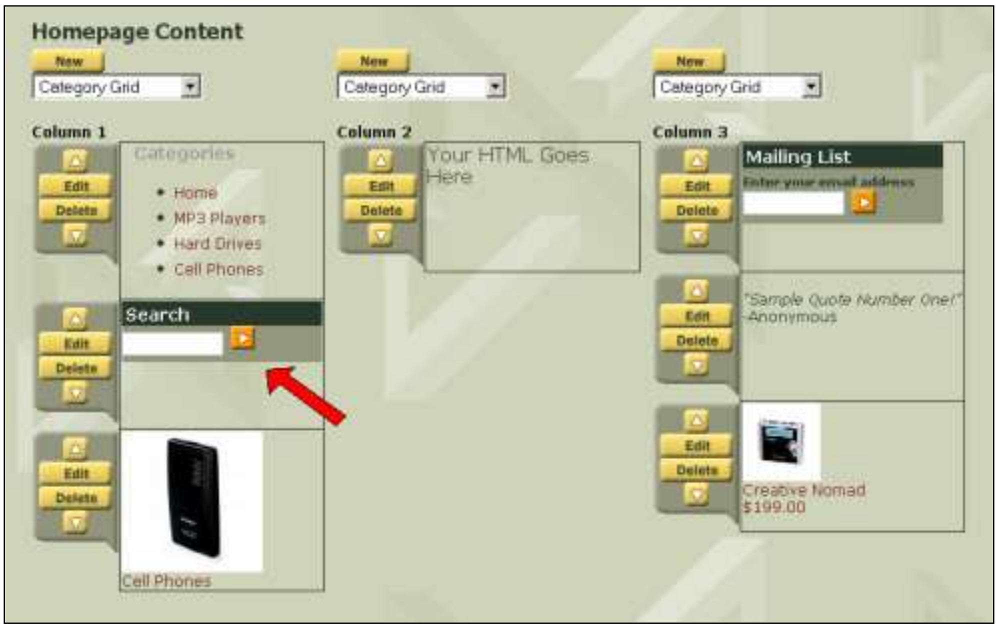
Administration website location: ***Content*** *>* ***Home Page, Category Page, and Product Page***

The Search Box content block element adds a textbox that will allow users to input keywords to search for products.

To add a new Search Box content block element, follow the steps below:

1. Select **Search Box** from the drop down list above the column where the content should be placed
2. Click the **New** button
3. Click the **OK** button to save the new content block

The figure "Search Box Content Block" below shows placement of a search box on the first column of the Homepage.



4-116 Search Box Content Block

4.6.1.9. Social Network Plugins

Administration website location: ***Content*** *>* ***Home Page, Category Page, and Product Page***

The Social Network Plugins element will allow you to add the Twitter Button and/or with the combination of Facebook's Like Button and Like Box.

To add a new Social Network Plugins content block element, follow the steps below:

1. Select **Social Network Plugins** from the drop down list above the column where the content should be placed
2. Click the **New** button

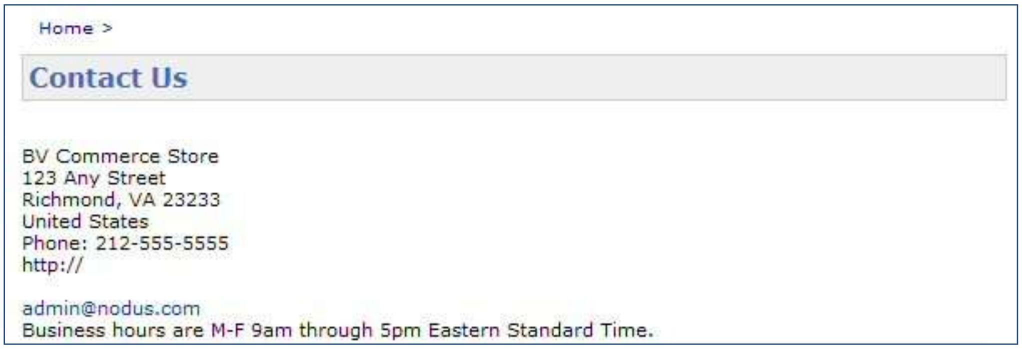
3. Checkmark each of the options you wish to enable:
   - **Twitter Button** – Add Twitter Buttons to the site to help your visitors share content and connect with you on Twitter.
   - **Like Button** – The Like button lets users share pages back to their Facebook profile with one click.
   - **Like Box** – The Like Box enables users to like your Facebook Page and view its stream directly from the homepage. The URL to your Facebook Page must be entered under **Settings → General Options: Site Options**, in order for this feature to work properly.
4. Click the **OK** button to save the new content block

4.6.5. Store Information

*Administration website location: **Content** > **Store information***

This area reflects basic information regarding the store. The store information is edited in this location in the administration settings and is displayed in the customer service area of the store. The copyright line will be displayed in the footer of the site. Do not prefix with a © symbol as one will be prefixed automatically.

4-117 Store Information



4-118 Customer Service Information as Displayed on Store

4.6.6. Store Logo

Administration website location: ***Content*** *>* ***Store Logo***

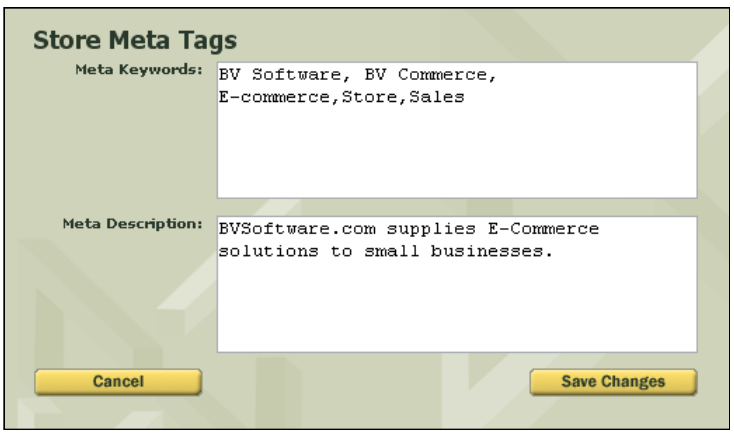
Use this area to load the logo for your business onto the webstore. The logo will be displayed on the top left corner of the site as well as in e-mail correspondence. When specifying a logo, test the appearance on the site and e-mails and keep the file size, image size, and colors consistent with the theme.

Figure 4-119 Store Logo

4.6.7. Store Meta Tags

*Administration website location: **Content >Store Meta Tags***

Meta tags can be assigned at the Store level, Category level, and for each individual product. Enter Meta keywords and description for the store in the editor as shown in the figure "Store Meta Tag Editor" above. Meta tags will be displayed and updated in a descending order of available meta tags. If the main page is displayed, the Store Meta Tags are used, if a category is displayed, and the category contains meta tag information, the categories meta tags will be used. Subsequently, if the Meta tag information has been defined for a product and a product detail is being viewed (e.g. crawled by search engines); the meta tags for the target product will be used.



4-120 Store Meta Tag Editor

This system provides flexibility for search engine optimization of the store.

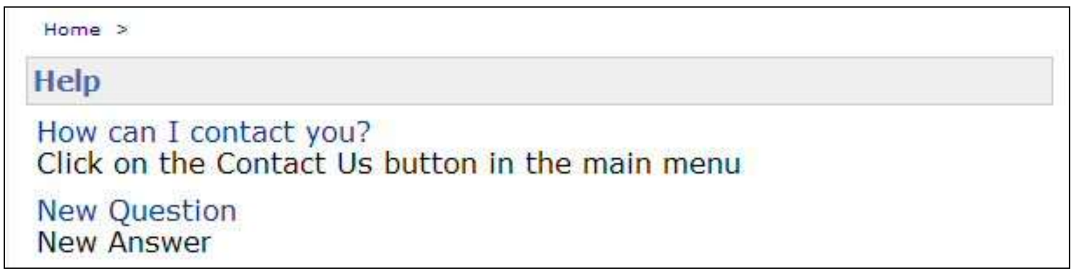
4.6.8. Help/FAQ

Administration website location: ***Content*** *>* ***Help/FAQ***

This resource allows the user to build a Help and/or Frequently Asked Questions (FAQ) section. The interface asks for a question-answer combination that appears in the Customer Service > Help page of the webstore.

When the shopper clicks on the customer service link, a menu of available resources are displayed on the left side of the screen.

A shopper can click the **Help** link and a list of Frequently Asked Questions is displayed as configured in this merchant area. Create as many questions that shoppers may have then enter the answer to the question. The questions will appear as links. When clicked, the answer displays as shown in the figure "Sample FAQ Question with Answer Displayed" below.



4-121 Sample FAQ Question with Answer Displayed

4-122 Admin List of FAQ

To create or edit a Question/Answer pair:

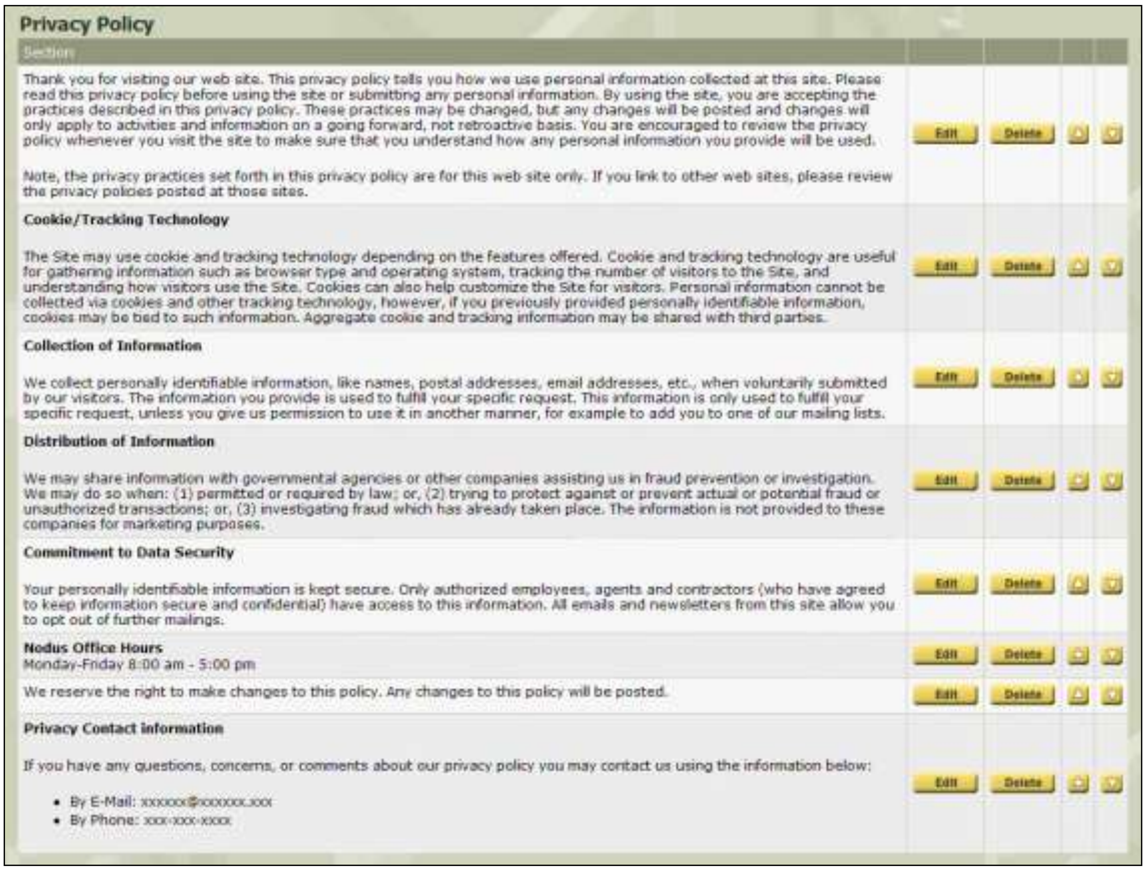
1. The Edit Help Section page is used to create New question/answer pairs or edit existing FAQs.
2. Click New to open a blank Edit Help Section page or click the Edit button to update or change and existing FAQ
3. Click OK to save the new FAQ or make any changes permanent
4. The new information will be displayed in the webstore FAQ page

4-123 Help Question Editor

4.6.9. Privacy Policy

*Administration website location: **Content** > **Privacy Policy***

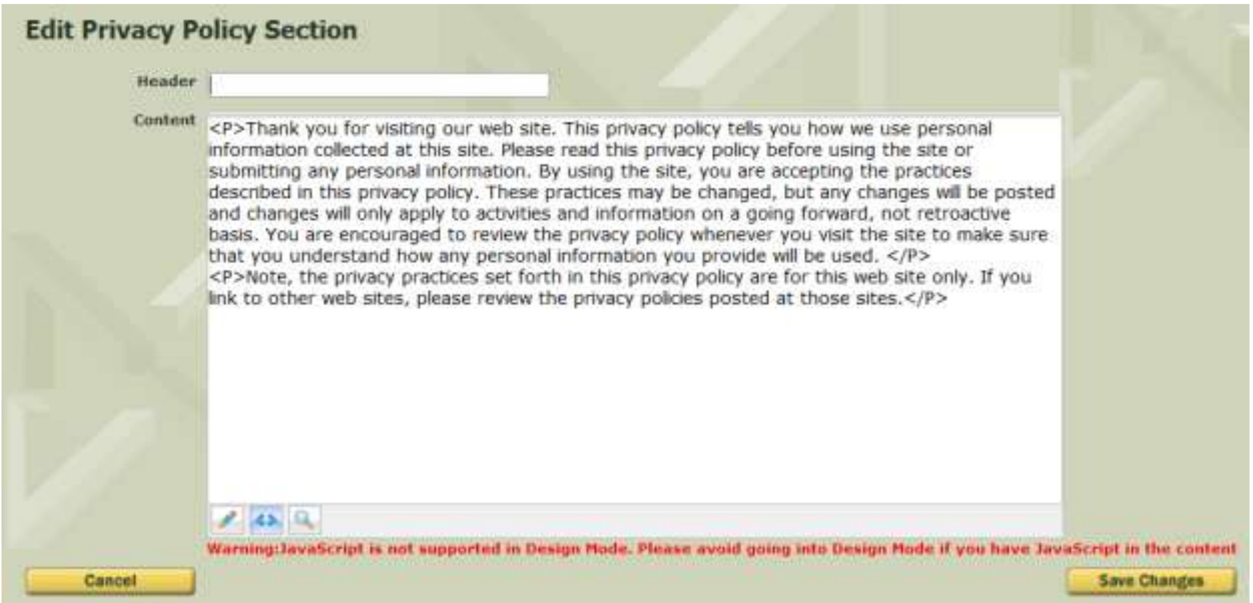
The Privacy Policy area allows content pertinent to the business privacy policy. Each section of the privacy policy is a separate unique section with a title header and content below. The figure "Sample Privacy Policy" below shows the sample privacy policy that ships as an example only for use with a new store. Be sure to replace this with the businesses approved privacy policy.



4-124 Sample Privacy Policy

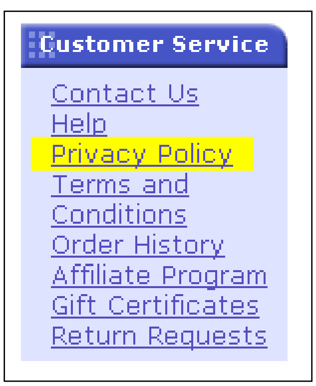
- To create a new Privacy Policy section, click the **New** button in the lower left.
- To edit an existing section, click the **Edit** button for that section
- Click **Delete** to delete the section

Click the up/down arrows in the far right to modify the section order. If you do not wish to have a section header (bold text in example above), leave the header field blank. The figure "Privacy Section Designer" shows the simple section editor to add/edit sections.



4-125 Privacy Section Designer

The privacy policy link is presented to the shopper from **Customer Service** > **Privacy Policy**.



4-126 Privacy Policy in Customer Service Area

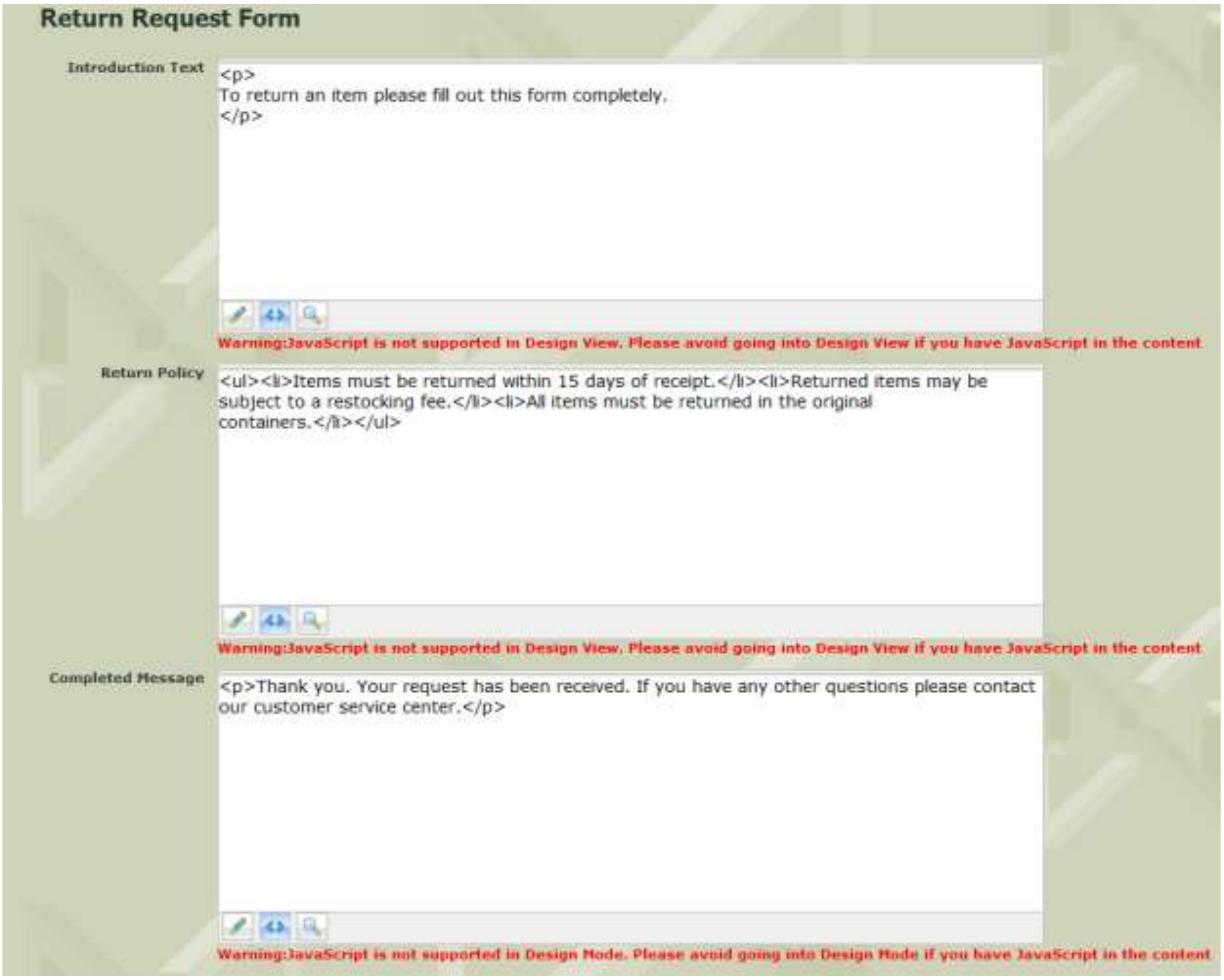
4.6.10. Return Request Form

Administration website location: ***Content*** *>* ***Return Request Form***

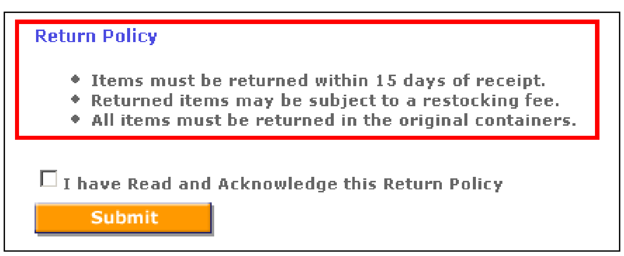
The customer service link provides policy and customer service related information. The link at the bottom of the list in the accompanying figure will present the shopper with return policy information, and if a return form is enabled in the Section "Returns" area, a return form will be provided to process the return as shown in the figure "Return Request Form" below.

4-127 Return Request Form

In the merchant area, you can control whether or not the return form is displayed, and edit the header text, policy items (as shown in the figure "Return Policy Items at Bottom of Page" below) and the message returned to the shopper after a request form is submitted.



4-128 Return Policy Editor



4-129 Return Policy Items at Bottom of Page

4.6.11. Shipping Policy

Administration website location: ***Content >Shipping Policy***

When a shippable product is ordered, the store will present estimated shipping charges to the customer. A link to the company shipping policy is provided on that checkout page.

The shipping policy can be changed or edited as shown in the **Shipping Policy** page displayed below. Add or change the information and click the **Save Changes** button and the new/updated shipping policy will be displayed on the webstore during the checkout process.

4-130 Edit Shipping Policy

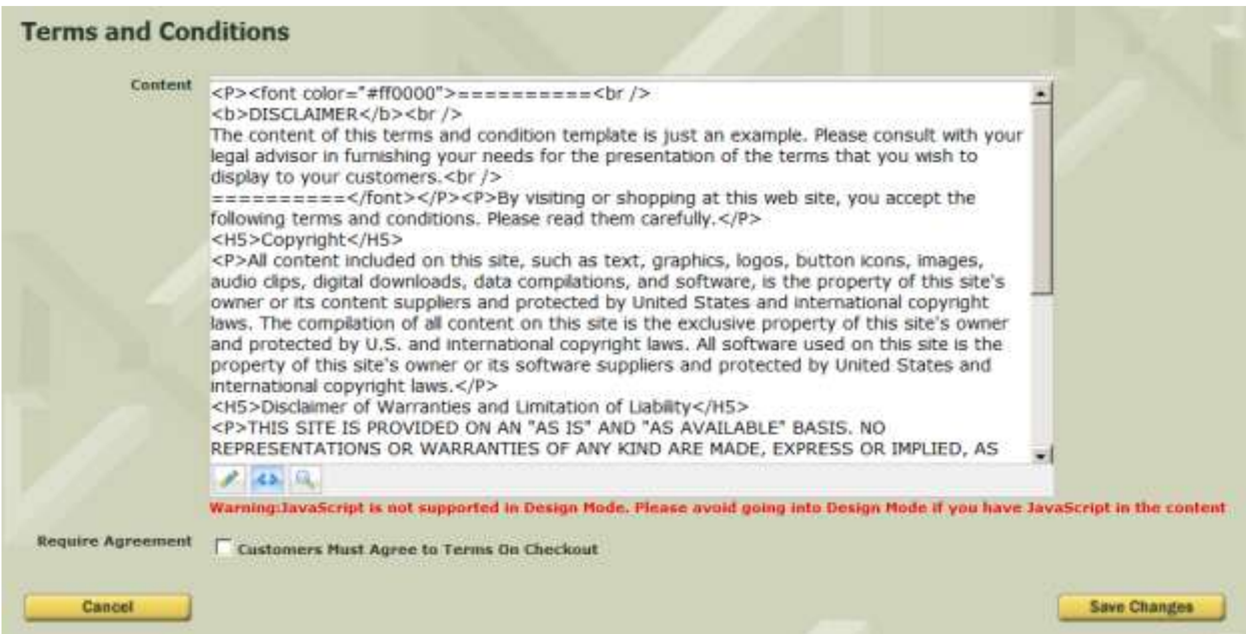
4.6.12. Terms and Conditions

*Administration website location: **Content >Terms and Conditions***

Terms and conditions can be edited to be viewed when a shopper clicks the **Terms and Conditions** link in the Customer Service page.

You can also set a requirement that the shopper must mark a checkbox, as shown in the figure “Terms and Conditions Link at Checkout (highlighted)” below, stating they have read and agree to the terms and conditions. A link will also be provided to view the terms and conditions opened in a new window.

Edit the terms and conditions as shown below in the Terms and Conditions editor. Check the checkbox to Require Agreement at checkout.



4-131 Terms and Conditions Editor

4.6.13. E-mail Message Templates

Administration website location: ***Content*** *>* ***E-Mail Messages***

The Email Message link in the content manager area allows customization of the template messages that are sent in response to different events with the store. You can edit any of several e-mail templates by clicking the edit button as shown in the accompanying figure, which shows the e-mail template editor when clicking the **New Order Receipt E-mail Edit** button. Any of these e-mail types can be easily disabled by marking the adjacent checkbox and clicking **Save Changes**.

4-132 E-mail Message Templates

4-133 E-Mail Template Editor

Depending on the e-mail template, different sections are available for edit. At the top of each template editor, choose the sending format of the message, HTML or Text. HTML e-mails can be richer in content and take advantage of HTML formatting, however, some clients using older e-mail software may not be able to read the message. If concerned about e-mail compatibility, you may want to consider using text messages; however, most users can accept HTML e-mail messages now.

Enter the HTML sections as shown above. Do not include HTML or BODY tags, NODUS ESTORE SOLUTION STACK will create the HTML formatting template for you. Only include the sections as if you were building the content inside a BODY tag of a web page, as demonstrated in Figure "E-mail Template Editor" above.

eSSS uses "replacement variables" as indicated at the bottom of the template. Each replacement variable such as [[logo]] will be replaced with the information as described to the right of the indicated replacement variable, your company's logo that was uploaded earlier. Notice the subject line has the following text "Order receipt for order [[ordernumber]]". When the e-mail is sent, the replacement variable will be changed from [[ordernumber]] to the actual order number of the processing order.

The ability to construct e-mail templates with replacement variables gives you, the merchant, full flexibility in personalizing the theme of messages sent in response to actions of the store. Providing the merchant the tools to create a professional and customized image is our focus with the system provided here.

4.6.14. Custom Pages

*Administration website location: **Content** > **Custom Pages***

Customer pages provide the powerful capability of adding web pages to the store using the included content editor. Custom pages can automatically show links in the footer menu and navigate to the new web page showing the content as provided in the editor such as in Figure "Example of a Custom Page" below. When clicking the Custom Pages menu item in the Content side menu, a list will appear of custom pages you created. Click the **Edit** button to edit the selected custom page, delete to remove it, or **New** to add a new custom page.

4-134 Custom Page List

4-135 Custom Page Example

In the example above, we created a new link for the footer so our shoppers can view newsletters. The link will appear in the bottom (footer) menu as indicated by placing a checkbox in **Show in Bottom Menu.** The accompanying figure shows the link as it will appear in the footer and the page is displayed once clicked.

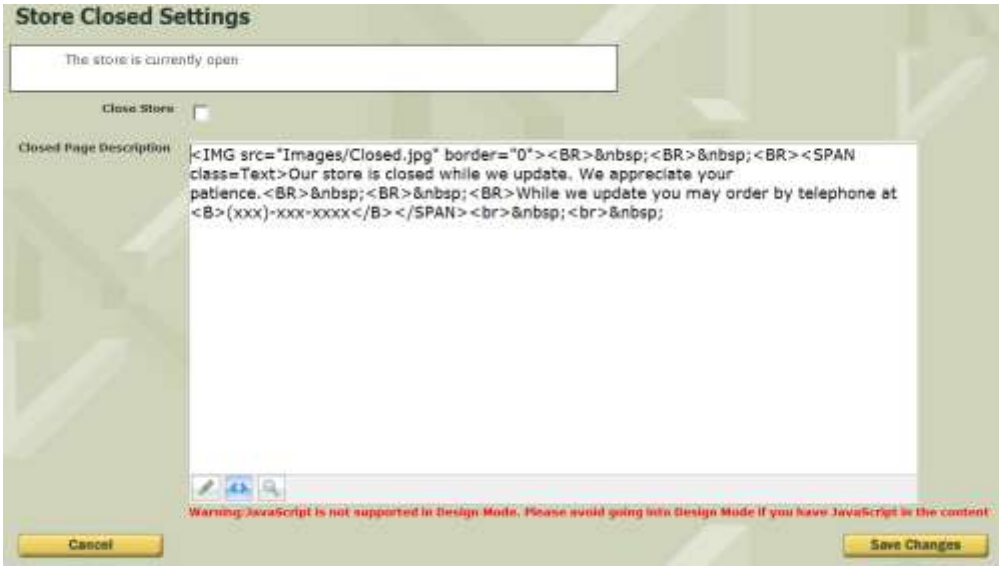
4.6.15. Open/Close Store

*Administration website location: **Content** > Open/Close Store*

From time to time, there may be a reason to close the store, whether for system upgrades, inventory updates, product configuration changes, etc. To prevent customers from shopping during an upgrade process, such as server maintenance, graphics changes, you can close the store and inform the shoppers that the store is temporarily closed and when to return. Having a friendly "closed sign" will help shoppers understand that your business is reliable and you are simply performing required upgrades.

4-136 Closed Store View

To close the store and control the message displayed to shoppers, click the Open/Close Store menu link in the Content area. Enter a HTML formatted message (HTML and BODY tags not required) as shown in the default example in Figure "Store Closed Message". To close the store, check the "Close Store" checkbox. To reopen the store, clear the checkbox and click **Save Changes** to commit the changes.



4-137 Closed Store Message

NOTE: If you close the browser and return, go to http://yourstoredomain/bvadmin/login.aspx to login and update the store status.

4.7. Orders

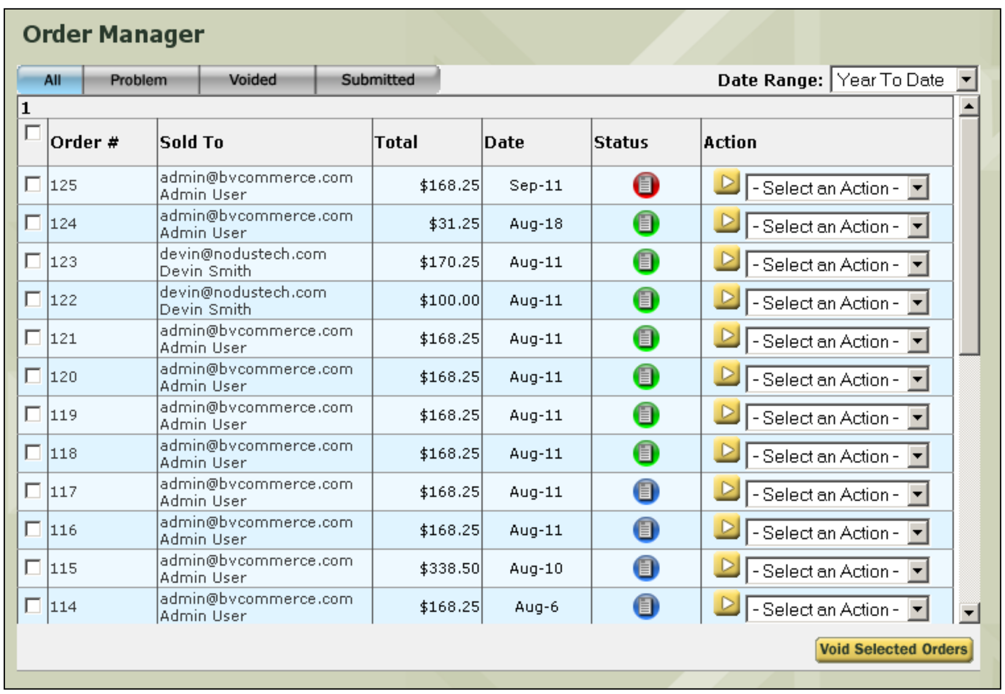
4.7.1. Order Manager

*Administration website location: **Orders** > **Order Manager***

4-138 Order Status Key

The Order Status Key provides a graphical help guide for determining the status of an order.

Each order within the Order Manager has a code indicator that can be used to quickly determine the status of an order. These status code indicators are color coded according to the Order Status Key. A tool tip can also be used to determine the status of an order by rolling the mouse over one of the status codes. capital



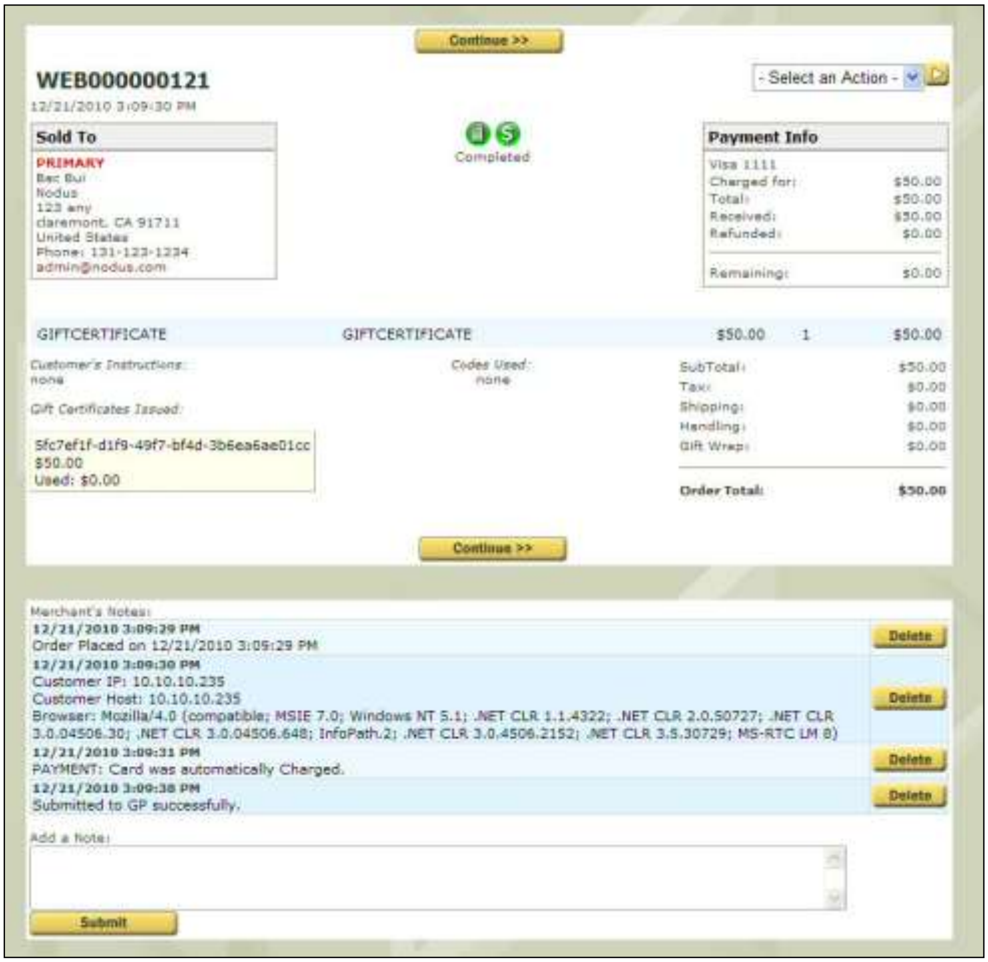
Order #	Sold To	Total	Date	Status	Action
125	admin@bvcommerce.com Admin User	$168.25	Sep-11		- Select an Action -
124	admin@bvcommerce.com Admin User	$31.25	Aug-18		- Select an Action -
123	devin@nodustech.com Devin Smith	$170.25	Aug-11		- Select an Action -
122	devin@nodustech.com Devin Smith	$100.00	Aug-11		- Select an Action -
121	admin@bvcommerce.com Admin User	$168.25	Aug-11		- Select an Action -
120	admin@bvcommerce.com Admin User	$168.25	Aug-11		- Select an Action -
119	admin@bvcommerce.com Admin User	$168.25	Aug-11		- Select an Action -
118	admin@bvcommerce.com Admin User	$168.25	Aug-11		- Select an Action -
117	admin@bvcommerce.com Admin User	$168.25	Aug-11		- Select an Action -
116	admin@bvcommerce.com Admin User	$168.25	Aug-11		- Select an Action -
115	admin@bvcommerce.com Admin User	$338.50	Aug-10		- Select an Action -
114	admin@bvcommerce.com Admin User	$168.25	Aug-6		- Select an Action -

4-139 Order Manager

The Order Manager will display orders from newest to oldest in descending order. You can use the "All", "Problem", "Voided", and "Submitted" buttons located above orders to filter the order list respectively. You can also use the "Date Range" drop down list to filter orders by the date range specified.

The **Void Selected Orders** button on the **All** page and the **Resubmit All Checked Orders** button on the **Problem** page located at the bottom of the order list are used in correlation with the checkboxes located to the left of each order. The checkbox allows you to select a single order or multiple orders for quick action. **Select an Orders** checkbox and use these buttons to void an order, or resubmit an order.

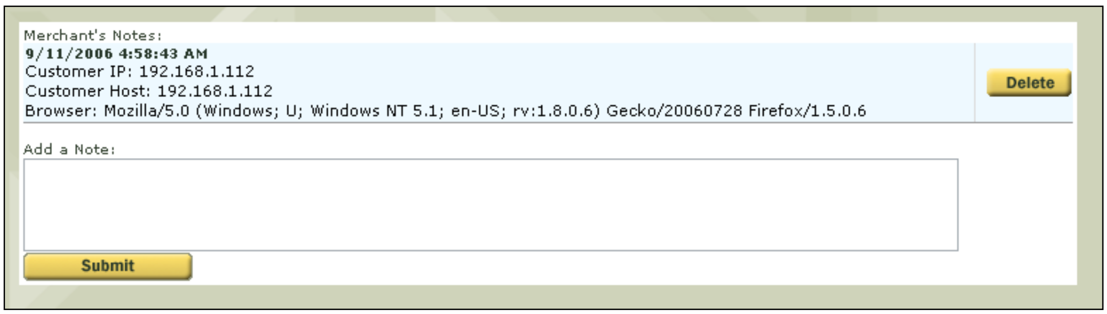
If an order is marked as a problem order you are given the option to view or edit the XML from the action list, giving you a change to correct the problem order. You can also view the details of the order from the action list.



4-140 View Order Details (top)

The **View Order Details** page gives the user the ability to view detailed information about the customers purchase. This page can be accessed by directly clicking on the order, or by using the Action List from the **Order Manager** menu.

1. Navigate to **Orders** > **Order Manager**
2. Use the drop list to select a date range for orders to be viewed
3. When the Order Manager list populates with orders, select the tab that gives the view to be utilized
4. Filter the list as needed by clicking on a list menu header such as Date or Order #
5. If needed, choose from the **Selection in Action** drop-down list and click the **Action** button to engage functions such as viewing order details
   NOTE: Voided and Processed orders can be viewed in detail or marked as a problem. Problem orders can be seen in an XML view and/or marked as completed
6. If needed, orders can be resubmitted or voided: choose a tab and mark one or more checkboxes by the order number(s)
7. Click the appropriate button to process the order



4-141 View Order Details (bottom)

NOTES:

- The bottom portion of the Order Details page provides detailed information about a user, and the user's transaction.
- You can view the customers IP address, Host IP address, or the user's browser information. Credit Card authorization notes or responses from the payment gateway on authorization statuses such as declines will also appear in this area.
- Admin notes can be added and viewed immediately by other admin users.
- From the action list, you have the option of editing or viewing the XML of the order, marking the order as completed or 'as shipped.'

4.7.1.1. Order XML

When an order fails to submit to Great Plains, it is marked as a problem order. Once it is a problem order, eSSS gives you the opportunity to edit or view the XML of the order. Sometimes an order can become a problem order if the back office server fails to respond. In this case, you should use the button on the main order manager screen to resubmit a large number of orders.

4-142 XML View

To see the error message, try resubmitting, and based on the error message returned, edit the XML to try to resolve the problem. If the order has been successfully edited, a message appears confirming that the order is now in Great Plains.

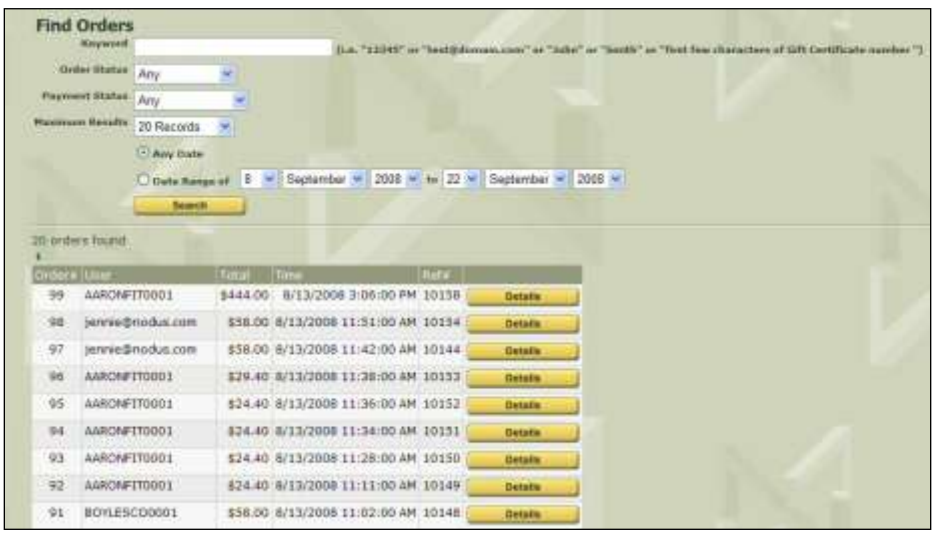
Usually, you will not have to go to this screen. After the store has become integrated, orders should flow directly to Great Plains.

4.7.2. Search Orders

*Administration website location: **Orders >Search Orders***

To search for orders, navigate to **Search Orders** > **Find Orders** and enter search criteria in field as shown in the accompanying figure "Find Orders System." To retrieve all orders, click the **Search** button with the defaults displayed. Once search results are retrieved, information such as "Order#, User, Total, Time, Ref#" is displayed.

4-143 Find Orders System



4-144 Search Results in Find Orders

Orders are displayed in descending order by date. Click the **Details** button to view order details. If payment has not been collected, such as in a scenario of a credit card system set to authorize, then Capture payment can be processed by clicking the **Receive Payment** button. If an order has shippable items, click the **Ship Items** button to process payment (if required) and ship items. Confirmation e-mails finalizing the sale are also sent.

4.7.3. Customer Information

Administration website location: ***Orders*** *>* ***Customer Info***

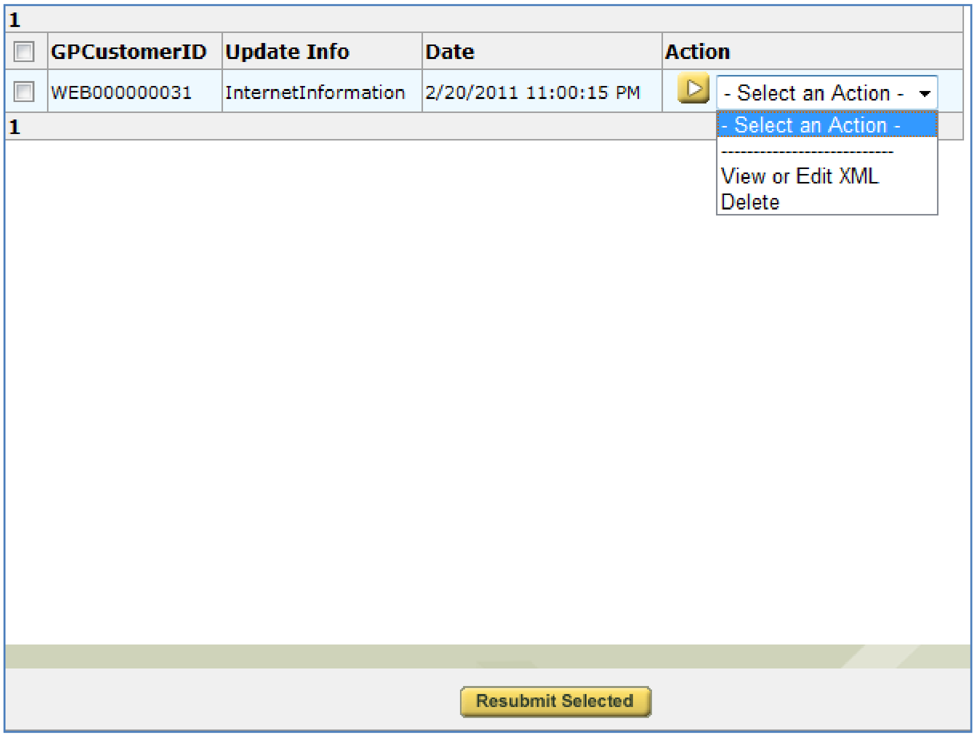


Figure 4-145 Customer Information

Customer records failed to synchronize to the back office is listed on this page. These failed synchronization records are in XML format, and this page provides the ability to view and edit the XML data, as well as resubmitting the record to the back office.

If any XML data needs to be changed, choose **View or Edit XML** from the dropdown list and click on the adjacent arrow. To delete the customer XML data permanently without resubmitting, choose **Delete** from the dropdown list and click on the adjacent arrow.

Select the checkboxes (multiple selections allowed) then click **Resubmit Selected** button to resubmit the records.

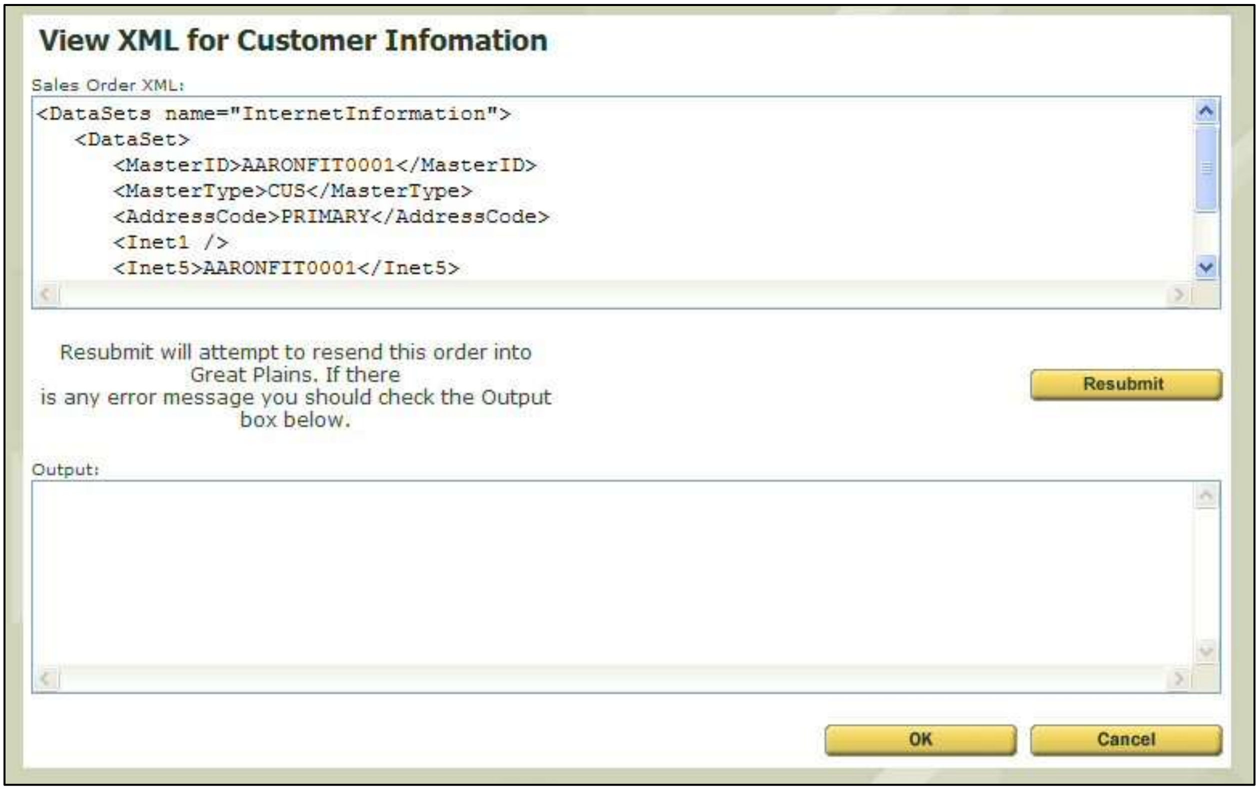


Figure 4-146 Customer Information Edit

If **View or Edit XML** is chosen, the XML data can be updated. Click the **OK** button to save the changes.

Click the **Resubmit** button to submit the XML data to back office. The Output box will display the response message to show if the data has been successfully sent to the Dynamics GP database. If unsuccessful, an error message explaining the nature of the problem is displayed.

4.8. Reports

The EStore Solution Stack shopping cart comes with several different reporting functions. This section describes how to use each reporting function.

After reading this section, you will know:

- How to view monthly and daily sales
- How to view sales by promotion, or affiliate
- How to view top products, and/or customer

Order Details

For each report, a details page for individual transactions can be reviewed by clicking the **Details** button. A sample Order Details page is shown below.

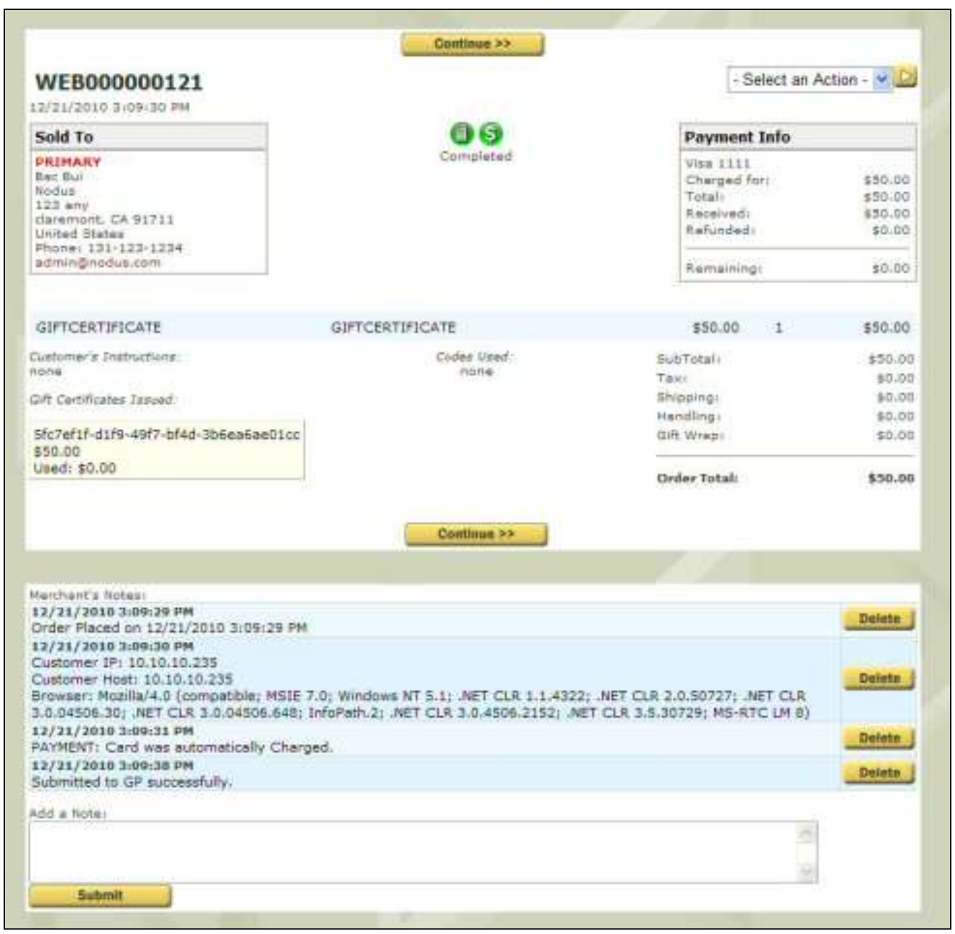


Figure 4-147 Order Details page

4.8.1. Monthly Sales

*Administration website location: **Reports** > **Monthly Sales***

The Monthly sales report shows a graphical display of orders for the selected month as well as a detailed day-by-day list of sales on an everyday basis containing the number of orders and daily total. Click the **Details** button to display the order details by "drilling down" into the selected day. Select the month and year value at the top of the area to set the target data, click the **Next** button to advance to the next month, or click the **Previous** button to move to the prior month.

Figure 4-148 Monthly Sales Reports

4.8.2. Daily Sales

*Administration location: **Reports** > **Daily Sales***

Daily sales reports are similar to monthly reports with the exception that only one day at a time is viewed. The details button shows information regarding the corresponding order. The Order Details screen displays all information for the corresponding order and allows operations such as:

- Printing
- Marking the order as Not Paid
- Sending status e-mails to the customer

Order Number	Sub Total	Shipping	Handling	Tax	Grand Total	
WEB000000012	$120.00	$3.75	$0.00	$0.00	$123.75	Details
WEB000000010	$60.00	$2.50	$0.00	$0.00	$62.50	Details
WEB000000009	$30.00	$1.25	$0.00	$0.00	$31.25	Details
WEB000000008	$60.00	$2.50	$0.00	$0.00	$62.50	Details
WEB000000007	$30.00	$1.25	$0.00	$0.00	$31.25	Details
WEB000000006	$70.00	$2.50	$0.00	$0.00	$72.50	Details
WEB000000005	$40.00	$1.25	$0.00	$0.00	$41.25	Details
WEB000000004	$50.00	$1.25	$0.00	$0.00	$51.25	Details
WEB000000001	$250.00	$5.00	$0.00	$0.00	$255.00	Details
	$710.00	**$21.25**	**$0.00**	**$0.00**	**$731.25**	

Figure 4-149 Daily Sales Report

4.8.3. Sales by Coupon Code

Administration website location: ***Reports*** *>* ***Sales by Coupon Code***

This report tracks any sales that are received when a coupon is redeemed on the webstore. Additional information for individual coupon transactions can be viewed by clicking the Details button for the individual order shown on this page.

For information on creating and redeeming coupons refer to the **Catalogs** > **Discounts** section of this document.

Figure 4-150 Sales by Coupon Code Report

4.8.4. Sales by Affiliate

Administration website location: ***Reports*** *>* ***Sales by Affiliate***

Select the affiliate from the drop down list and the appropriate date filter then click **Refresh** to display orders associated with the selected affiliate.

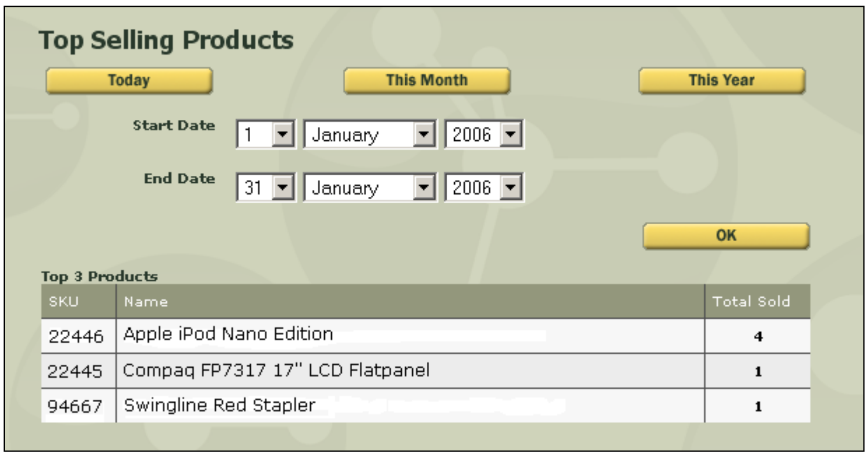
Clicking the **Next** or **Previous** button will display the next or previous month's report.

4-151 Monthly Affiliate Report

4.8.5. Top Products

Administration website location: ***Reports*** *>* ***Top Products***

Click the **Today**, **This Month**, or **This Year** button to display top selling products for the quick filtered time frame. If you would like to narrow the date filter criteria, select a start and end date then click **OK** to show the top products for the manually entered date filter.



4-152 Top Selling Products

4.8.6. Top Customers

*Administration website location: **Reports** > **Top Customers***

Top Customers are displayed in the same manner as Top Products. Click the **Today**, **This Month**, or **This Year** button at the top for quick date filter settings, or set a start and ending date then click **OK** to manually filter data on top customers.

NOTE: Clicking on the **Details** button opens the **Edit User** page, where customer details can be updated.

Figure 4-153 Top Customers Report

4.8.7. WPPReporting

*Administration website location: **Reports** > **Daily Sales Report***

This group of reports tracks payment activities for Payflow Pro transactions. Three types of reports are available:

- Daily Activity Report
- Transaction Summary Report
- Settlement Report

4.8.7.1. Daily Activity

This report provides details on all successful transactions completed during a specified single date. Useful data in the report includes:

- Amount
- Transaction type
- Transaction ID

Figure 4-154 WPP Reporting – Daily Activity Report

4.8.7.2. Transaction Summary

*Admin website location: **Reports** > **WPPReporting***

This report provides details on all successful transactions completed during a specified period. Useful data in the report includes:

Transaction type

Specifies what processor was used

Authorization transaction counts by processor

Amount range for transactions, including an amount average

Figure 4-155 WPP Report - Transaction Summary

4.8.7.3. Settlement Report

This report offers details on settled payment transactions for Payflow Pro. Useful fields include:

- Transaction and PayPal transaction IDs
- PayPal fees charged
- Transaction amount
- Batch ID

Figure 4-156 WPP Report - Settlement

4.9. Settings

There are a number of settings that can be set to control or define the eSSS shopping cart. Many of the settings here only need to be configured once, during the initial setup of the shopping cart. After reading this section you will understand what functionalities can be changed in the shopping cart.

4.9.1. General Options

*Administration website location: **Settings** > **General Options***

The general options area allows for configuration of overall store specific settings. The following outlines the description of each setting.

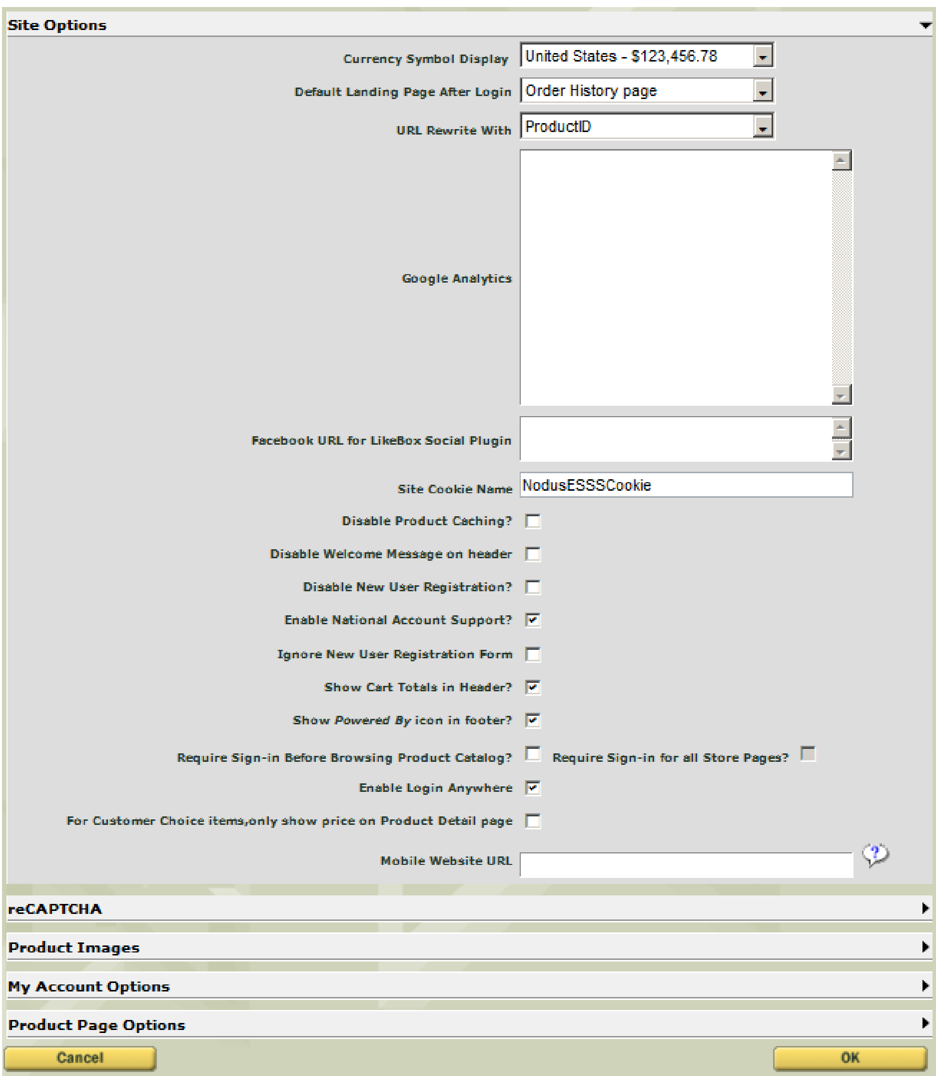


Figure 4-157 General Options page

*Administration website location: **Settings** > **General Options***

SETTING	DESCRIPTION
Site Options	
Currency Sample Display	Allows the notation identifying the currency used on the website to be changed for currencies such as the euro, dollar, and English pound. **Setting the currency default:** 1. Use Item Import via Synchronizer (data from Great Plains), which updates automatically between Great Plains and eSSS 2. Import prices for all currencies from GP. 3. Manual Item Import (data from GP) Import prices for all currencies from GP 4. Parsing the Imported Item Pricing Data (data into eSSS). Only save item pricings for the default Item Price Currency. 5. UI Changes a) The "Home Country" drop-down list on the General Options page ('configuration_display_options.aspx') is relabeled as "Currency Display" b) Under "Item Import Options" section on the "Nodus / Great Plains" page ('configuration_nodus.aspx'), add new text input box "GP Currency ID." This configuration should control the currency imported for item pricing as well as the currency on the orders submitted to GP.
Default Landing Page After Log-in	Allows commonly used pages to be established as the default opening website for eSSS. For example, if the customer usually starts working with orders, the Order History page can be the first page displayed after log-in.
URL Re-write With	This droplist allows the user to choose between ProductID and ProductName to re-write the URL when needed.
Google Analytics	Allows script procedure from Google to be added in order to enable Google Analytics, a tool that allows analysis of traffic on the website.
Facebook URL for LikeBox Social Plugin	When adding a Social Network Plugin element for Facebook's Like Box on your homepage, category page , or product detail page, you must enter your Facebook Page URL here.
Site Cookie Name	Establishes a cookie to identify the eSSS website. Enter a cookie name specific to your website in the textbox.

Administration website location: ***Settings*** *>* ***General Options***

SETTING	DESCRIPTION
Use Point System	This enables a Great Plains feature that distributes point awards. When this feature is active, ONLY points can be used to pay for products. No credit cards or ECheck payment is accepted.
Disable Product Caching?	To improve performance, products are "cached" or stored in memory on the web server for a short time. When a customer views a cached product the information is pulled from the memory on the web server instead of having to go retrieve it from the database which is much slower. Disabling the product caching allows you to quickly change prices and product information but is not recommended for most stores.
Disable Welcome Message on header	This setting allows the welcome message on the header of the webstore to be disabled.
Disable New User registration?	If checked, new user registration is inactivated
Enable National Account Support?	Mark this checkbox to enable the National Account support feature. The National Account – Child Account relationship is imported into eSSS from Great Plains, allowing for easier management of national/child accounts. This feature includes a new child account selection page in eSSS that is viewable at log-in.
Ignore New User Registration Form	When it is not desired for new webstore users to register from the website, the New User Registration form can be disabled from this setting.
Show Cart Totals in Header	If checked, keeps a running total of the items the shopper added to the shopping cart.
Show Powered By icon in footer	If checked, the "Powered by Nodus" logo will appear in the footer of all pages.
Require Sign-in Before Browsing Store?	This feature will require a log-in before the customer is able to browse the e-store.

Administration website location: ***Settings*** *>* ***General Options***

SETTING	DESCRIPTION
Require Sign-in Before Browsing Product Catalog	This setting requires the customer to log-in before they are able to look at product catalogs.
Require Sign-in for all Store Pages?	Requires the customer to log-in to access any portion of the website.
Enable Login Anywhere	Login Anywhere provides on-screen prompt for the customer to enter their credentials anywhere on the site when clicking "Sign In", without leaving the page they were viewing.
For Customer Choice items only, show price on Product Detail page	The base price of an item is hidden when there are differently priced options. When the customer chooses one of these options and another page opens, the original price is no longer shown.
Mobile Website URL	eSSS detects if the user is viewing the site from a mobile device, and will redirect the mobile device user to the Mobile Website URL specified. Leave the field empty to disable the redirection.
reCAPTCHA	
Enable Google's reCAPTCHA	Marking this checkbox activates Google reCAPTCHA, an anti-spam feature. This utility uses manual verification by requiring the user to enter a displayed series of words and/or numbers. **NOTE:** This feature requires signing up for reCAPTCHA directly with Google. reCAPTCHA is available from the following website: http://www.google.com/recaptcha/whyrecaptcha This feature can be used on the following page types by marking the checkbox displayed by the page name: • Forget password • New account creation • Change Email page • Change password page • Product Review page • Admin Log-in page

*Administration website location: **Settings** > **General Options***

SETTING	DESCRIPTION
reCAPTCHA Public Key	Enter the Google Public Key in this textbox. This is key is acquired from Google after signing up with Google for reCAPTCHA.
reCAPTCHA Private Key	Enter the Google Private Key in this textbox. This is key is acquired from Google after signing up with Google for reCAPTCHA.
reCAPTCHA Theme	This feature allows several options for the display of the reCAPTCHA interface, including: • Blackglass • Clean • Red • White
reCAPTCHA Test	A reCAPTCHA interface is provided in order that the tool's functionality can be verified. This interface reproduces what the customer will experience on the website. **To run a test:** 1. Type the symbols displayed in the reCAPTCHA interface into the accompanying textbox 2. Click the **Test** button 3. A message will appear just above the interface to indicate whether the test was successful. If unsuccessful, a new set of symbols is supplied and the test can be redone. **NOTE:** If symbols cannot be easily read, a new set is supplied by clicking the **Tester/Refresh** button
Product Images	
Force Image Product Sizes	If checked, eSSS will automatically handle re-sizing of the source image to comply with the Product Image sizes that are set.
Small Product Image Size	Sets the default size for small images. If the "Force Image Product Sizes" is checked, this size will be used to display small image placeholders. The system automatically re-sizes small image assignments to this size.
Medium Product Image Size	The default size for medium product images. If "Force Image Product Sizes" is checked, product images will be re-sized automatically
Tiny Product Image	The default size for cart images. Product images will automatically be re-

*Administration website location: **Settings** > **General Options***

SETTING	DESCRIPTION
Size	sized to this size for use in the cart display, if "Show Product Image in Cart" is enabled.
Default Image File Extension	Select a file extension of the image files that will be searched against by the system. Image formats available from a dropdown list includes: • JPG • GIF • PNG eSSS will search for files with above selected file extension from the **\images\Products** folder on the site root. The files are recognized through naming convention and associated with the corresponding products. The image file naming convention is as follows: • File name is started with the Item Number. • "_S" postfix is recognized as small sized images. • "_M" postfix is recognized as medium sized images. • "_L" postfix is recognized as an additional image. • "_L#" postfix is recognized as additional images, where "#" at the end of the filename can be any alphanumeric values (can be more than 1 digit), therefore supports unlimited number of additional images. **EXAMPLE:** 1. Set the global file extension option to "jpg" in the eSSS administration section. 2. Drop a file named "A100_S.jpg" into the <**root**>**\images\products** folder. This allows the system to recognize the file to be used as: A small image (as indicated by the "_S" postfix of the file name) for the "A100" item number. **NOTE:** The automatically determine image paths by file name feature does not support products with GP Item Number containing the following characters: \ / : * ? " < > |
My Account Options	
Allow Change E-mail	Permits the account e-mail address to be changed as needed.

*Administration website location: **Settings** > **General Options***

SETTING	DESCRIPTION
Address?	
Allow Change Password?	Permits the account password to be changed as needed.
Enable Wish List	This setting permits customers to view their wish list on the Shopping Cart page
Enable Multiple User Logins for one GP Account?	When enabled, it adds a "Manage Additional Logins" link under the Your Account section. This feature allows a single Great Plains customer account to be associated with multiple user log-ins.
Display # of Orders Per Page in Order History	Controls the number of orders displayed on a web page in the order history.
Single Sign-on to ePay Advantage: ***ePay Store ID***	This setting helps facilitate the single sign-on feature (See the appendix for details). Enter the Store ID of your Nodus ePay Advantage site. Must be used with ePay Store URL.
Single Sign-on to ePay Advantage: ***ePay Store URL***	This setting helps facilitate the single sign-on feature (See the appendix for details). Enter the web address of your Nodus ePay Advantage site. Please append the address with "SSO.aspx", such as http://ePay.MyCompany.com/SSO.aspx.
Product Page Options	
Show Additional Image thumbnails on Product Detail Page?	Permits additional thumbnail images to be displayed for a product item on the product detail page. There is no limit to the number of images that can be used.
Hide 'Print This Page' on Product Detail Page?	Allows 'Print This Page' to be added or removed from the Product Detail page
Hide 'E-mail This Page' on Product Detail Page?	Allows 'E-mail This Page' to be added or removed from the Product Detail page
Show Expected Ship Date for Back Order?	If checked, an anticipated ship date for back-ordered products is shown

4.9.2. Addresses

*Administration website location: **Settings** > **Addresses***

During the checkout process, EStore Solution Stack will present fields to the shopper to be filled out to complete the order. Use the configuration settings as shown above in Figure "Address Options" to determine which fields are displayed, and the fields that are required to continue with the checkout process.

- Marking the **Show?** textbox displays the field option (such as First Name) to the customer
- Marking the **Required?** checkbox makes the corresponding address field a required entry for the customer

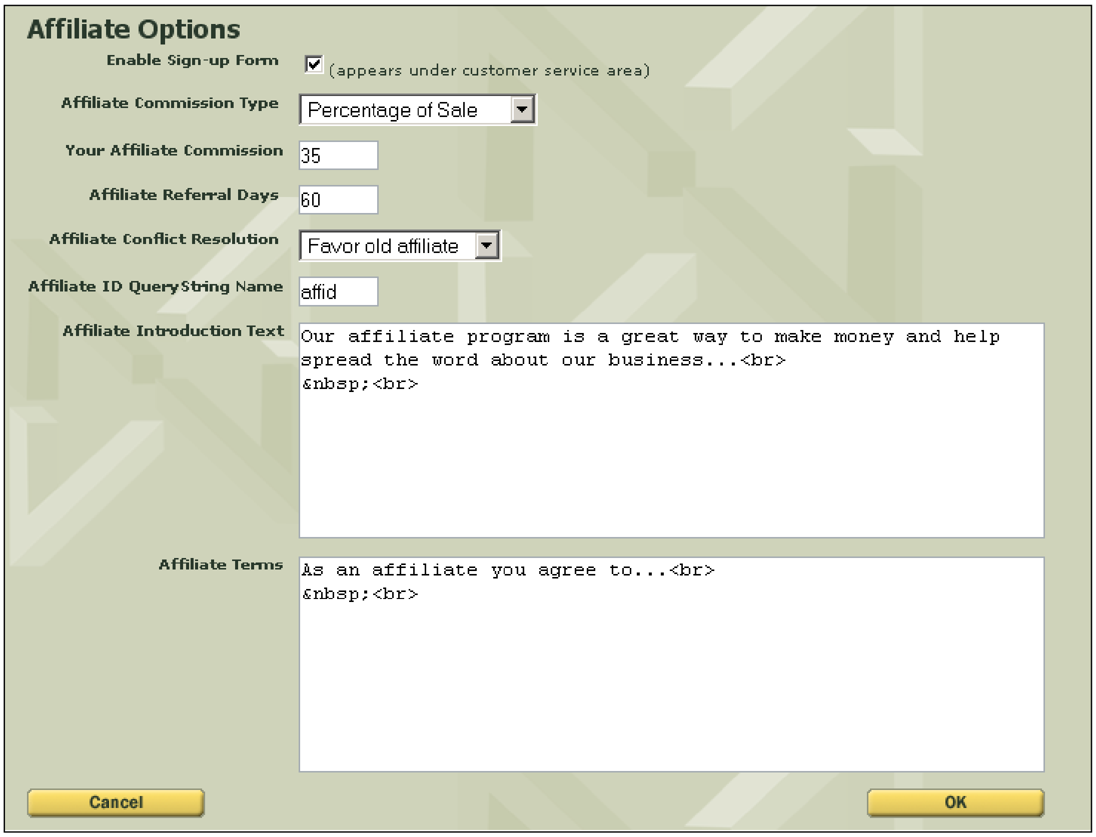
4-158 Address Options

SETTING	DESCRIPTION
Force Upper-Case for Addresses?	When enabled, all text entries in the billing and shipping address forms are displayed in upper case, regardless of how they were originally entered.
Allow shipping to PO Box/APO/FPO address?	Enables products to be shipping to PO Box, APO and APO addresses

4.9.3. Affiliates

*Administration website location: **Settings** > **Affiliates***

Extend rewards to affiliates by offering commissions for referring business to the store. Allows multiple affiliates to be created under the **People** > **Affiliates** setup page, and tracked under **Reports** > **Sales By Affiliate.** Refer to the following table for details on the available options.



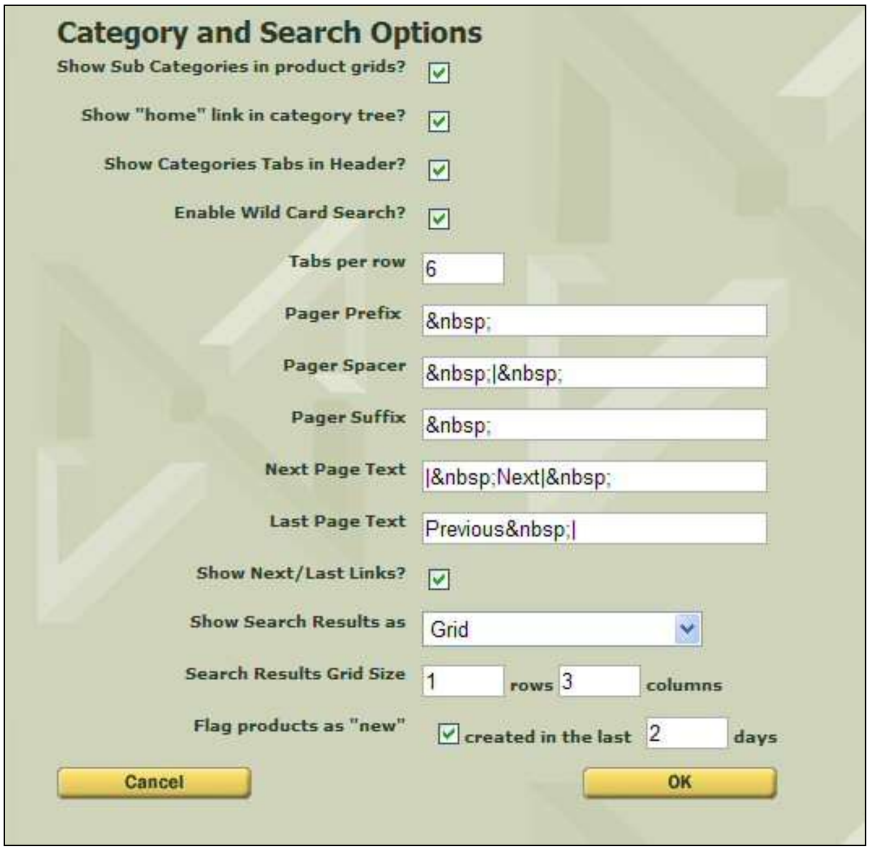
4-159 Affiliate Options

SETTING	DESCRIPTION
Enable Sign-up Form	If enabled, the Affiliate Program link will appear in customer service form as shown in the Affiliate Options accompanying figure.
Affiliate Commission Type	Choose between Flat Rate or Percentage of Sale commission to be offered to affiliates.
Your Affiliate Commission	Enter the value of the Sales commission to be offered to affiliates.
Affiliate Referral Days	The number of days a cookie will persist on the shopper's computer. Should a shopper use an affiliate link to visit the store, leave, come back another day and enter the store via the normal site URL (non-affiliate link), the cookie will be recognized and the associated affiliate will still receive affiliate commission if within this time period.
Affiliate Conflict Resolution	This feature handles referral conflicts. If a shopper visits the store via two different affiliate links, the first affiliate will be recognized as the referral source if **Favor Old Affiliate** is set. Vice versa, the second affiliate will be favored instead of **Favor New Affiliate** is set. Typically, this feature will assist in resolving conflicts over commissions except when affiliates are set up without commissions.
Affiliate ID Query String Name	This setting specifies the variable to be used on a URL to pass in the affiliate ID, used by the affiliate to redirect shoppers and the affiliate recognized as the referral source. The default is "affid" and can be modified. Examples of URLs with affiliate ID: http://www.MyCompany.com/default.aspx?affid=12, http://www.MyCompany.com/custom.aspx?affid=27.
Affiliate Introduction Text	When a shopper clicks the "Affiliate Program" link in the left side menu of the Customer Service area, a welcome message is displayed above the "Join the Affiliate Program" link as shown in the accompanying figure. This will be the place to display any messages to the affiliate program.
Affiliate Terms	Enter the terms and conditions relative to your affiliate program. A link will appear as shown in the bottom of the "Affiliate Program Sign-up form" below to allow prospective affiliates the option to read prior to joining.

4.9.4. Category and Search

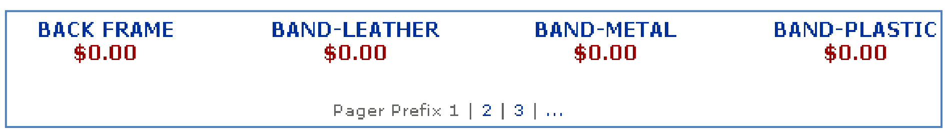
*Administration website location: **Settings** > **Category and Search***

The above options allow you to define how categories are displayed and searching occurs on the store. Each option is described in the following table.



4-160 Category and Search Option

4.9.4.1. Category and Search Options

SETTING	DESCRIPTION
Show Sub Categories in product grids?	If checked, sub-categories will be listed above the products on the category page.
Show home link in category tree	If checked, **Home** is the as top category link to return to the store's home page.
Show Categories Tabs in Header?	If checked, on the Category Edit page, you can specify any root categories to be listed as tabs across the top of pages. If the checkbox is cleared, tabs will be suppressed.
Enable Wild Card Search?	If checked, allows the use of an asterisk (*) as a single or multiple character wild card search term or a question mark (?) as a single character wild card term on the keyword search box.
Tabs per row	Controls the number of category tabs displayed per row before tabs are wrapped to the next row. Rows are filled from the bottom up.
Pager Prefix	For items such as search results, a paging line, as shown below, may appear if needed. Enter a value for the prefix to the pager line. 
Pager Spacer	Same as above, except this value is used to create a text item such as a | to separate paging values. **EXAMPLE:** 1 | 2 | 3 | 4, or if entering a comma "," it would be 1, 2, 3, 4.
Pager Suffix	Similar to the Pager Prefix except this is the trailing text such as "Results found".
Next Page Text	Indicator to navigate to the next set of results.
Last Page Text	Indicator to move to previous set of results available.
Show Next/Last Links?	If checked, the Next Page and Last Page indicators are displayed.
Show Search Results as	Determines the page layout of the search query results.
Search Results Grid Size	Defines the number of products in the search results and how they are listed.

SETTING	DESCRIPTION
Flag products as "new"	New products created within a defined number of days (default of 60) will have a "NewProduct.gif" image super-imposed on the upper left of the product image. This is useful to present shoppers items are new to your catalog. If setting up a new store, it is recommended that this option is unchecked; otherwise all inventory items are listed as new. You may want to turn this feature back on after the initial product line is no longer flagged as new.

4.9.5. Countries

*Administration website location: **Settings** > **Countries***

By default, the four enabled countries are: United States, United Kingdom, Canada, and Spain. Other countries that the store can accept orders for may be enabled by marking the checkbox for the corresponding country. This also controls which addresses are accepted as shipping and billing addresses. Customers will not be able to create addresses with the disabled countries.

Click the **States/Regions** button to view or edit items for the corresponding country.

Countries

Active	Country Name	Code	
☐	Albania	sq-AL	States / Regions
☐	Algeria	ar-DZ	States / Regions
☐	Argentina	es-AR	States / Regions
☐	Armenia	hy-AM	States / Regions
☐	Australia	en-AU	States / Regions
☐	Austria	de-AT	States / Regions
☐	Azerbaijan	az-AZ-Latn	States / Regions
☐	Bahrain	ar-BH	States / Regions
☐	Belarus	be-BY	States / Regions
☐	Belgium	fr-BE	States / Regions
☐	Belize	en-BZ	States / Regions

Figure 4-161 Country Settings (Image is cropped. Full list is not displayed).

4-162 Country/States/Regions Configuration

4.9.5.1. Edit a Region

To edit a region:

1. Click the **Edit** button for the region where changes are to be made
2. Input the changes in the textbox
3. The **Edit** button has turned into an **Update** button. Click the **Update** button to save the changes

4.9.5.2. Add a Region

1. To add a region, enter the region name in the **Name** textbox
2. Add an abbreviation, if needed, in the **Abbr.** text box
3. Click the **New** button

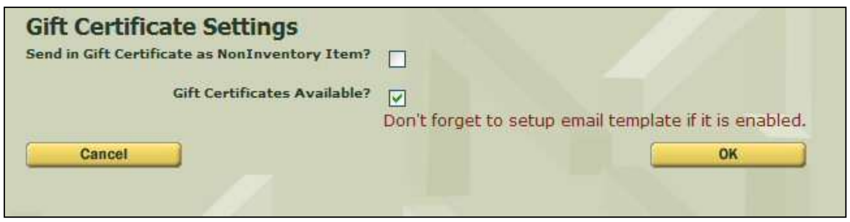
NOTE: To change regions on-the-fly, choose a new region from the Regions for droplist and click the **Reload** button

4.9.6. Gift Certificates

*Administration website location: **Settings** > **Gift Certificates***

eSSS offers the ability to purchase and redeem electronic gift certificates on the webstore. After purchasing, the gift certificate is automatically e-mailed to the recipient. To activate this feature, mark the checkbox next to "Gift Certificates Available?" which is marked (enabled) by default.

Marking the **Send in Gift Certificate as Non-inventory Item** checkbox is used when gift certificates are not tracked in Great Plains as inventory.

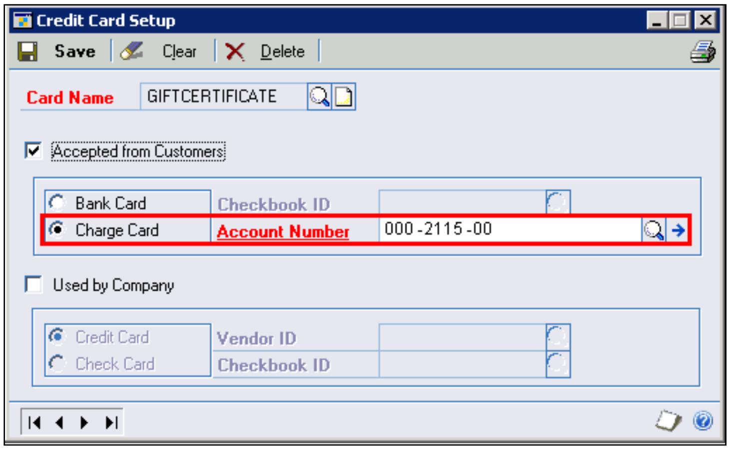


4-163 Gift Certificate Settings

4.9.6.1. Setting Up Gift Certificates in CCA

In Great Plains, we will need to have a "GIFTCERTIFICATE" Credit Card Name and a "GIFTCERTIFICATE" Inventory Item set up under the same account number. This account number could be a newly-created account or an existing account. A single unique account will allow for easy reconciliation. The "GIFTCERTIFICATE" inventory item allows customers to purchase gift certificates, and the "GIFTCERTIFICATE" credit card allows the customer to use a gift certificate. The "GIFTCERTIFICATE" item is NOT required to be imported from GP to the store.

For the Credit Card name, go to **Tools** > **Setup** > **Company** > **Credit Cards** and set up the "GIFTCERTIFICATE" Card Name as a Charge Card using the created/selected account number.



4-164 Gift Certificate Credit Card Setup in GP

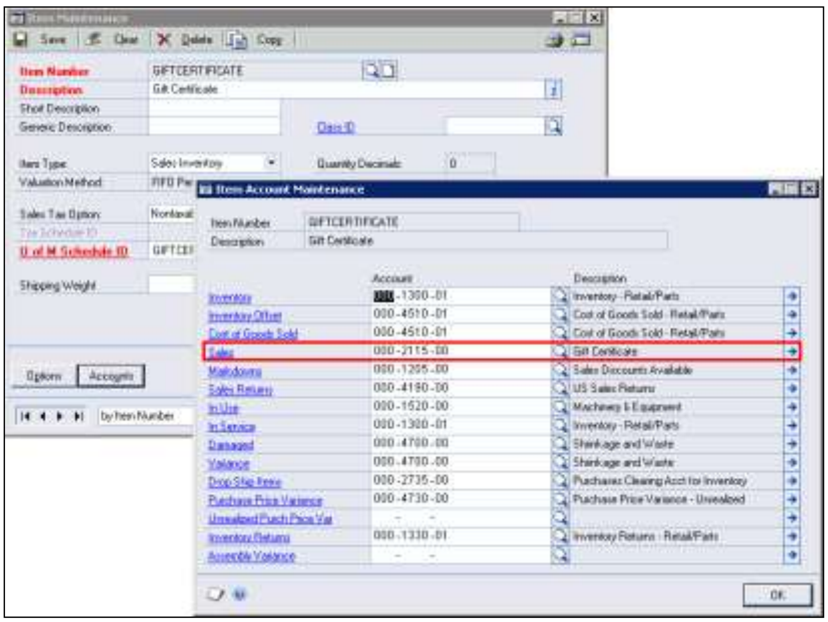


Figure 4-165 Gift Certificate Item Setup in GP

For the Inventory Item, go to **Cards** > **Inventory** > **Item** and set up an Inventory Item for "GIFTCERTIFICATE" and under Accounts, change the account in Sales with the selected/created account number. This Inventory Item must also set up all the available Price Levels and Unit of Measure (**Cards** > **Inventory** > **Price List**) set up to allow Great Plains order entry.

To ensure that the recipient receives their gift certificate e-mail the "From:" field on the Gift Certificate Message page must contain an email address.

NOTE: In addition, automated e-mail notification of how to redeem a gift certificate can be completed by navigating to **Content** > **Email Messages.** Additional information on this feature can be found at

4-166 Gift Certificates in Customer Service Area

4.9.6.2. Purchase a Gift Certificate from the Webstore

1. From the website, click on **Customer Service** from the bottom menu
2. Click on the **Gift Certificates** link
3. Fill out the recipient's information, including name and e-mail address
4. Add a name to the **From** textbox
5. Click on an amount for the gift certificate
6. Add a personalized message in the textbox
7. Click **Add to Cart**

NOTE: By default, the gift certificate e-mail template will only communicate the gift certificate number to the recipient. Any personalized message entered will be automatically added. To change the default message, the template is located in the administration section under **Content** > **Email Message**s > **Gift Certificate Notice** > (click the **Edit** button).

4.9.6.3. Redeeming a Gift Certificate

After checkout, a gift certificate code will be issued and emailed to the user's registered email that can be presented as a gift and used on the store for subsequent visits of any shopper holding the certificate code.

During the checkout process, the customer will be able to enter the certificate code on a payment page. eSSS will deduct the amount of the gift certificate from the cart total.

4-167 Gift Certificate Code Entry for Redemption at Checkout

4.9.7. Inventory Settings

*Administration website location: **Settings** > **Inventory Settings***

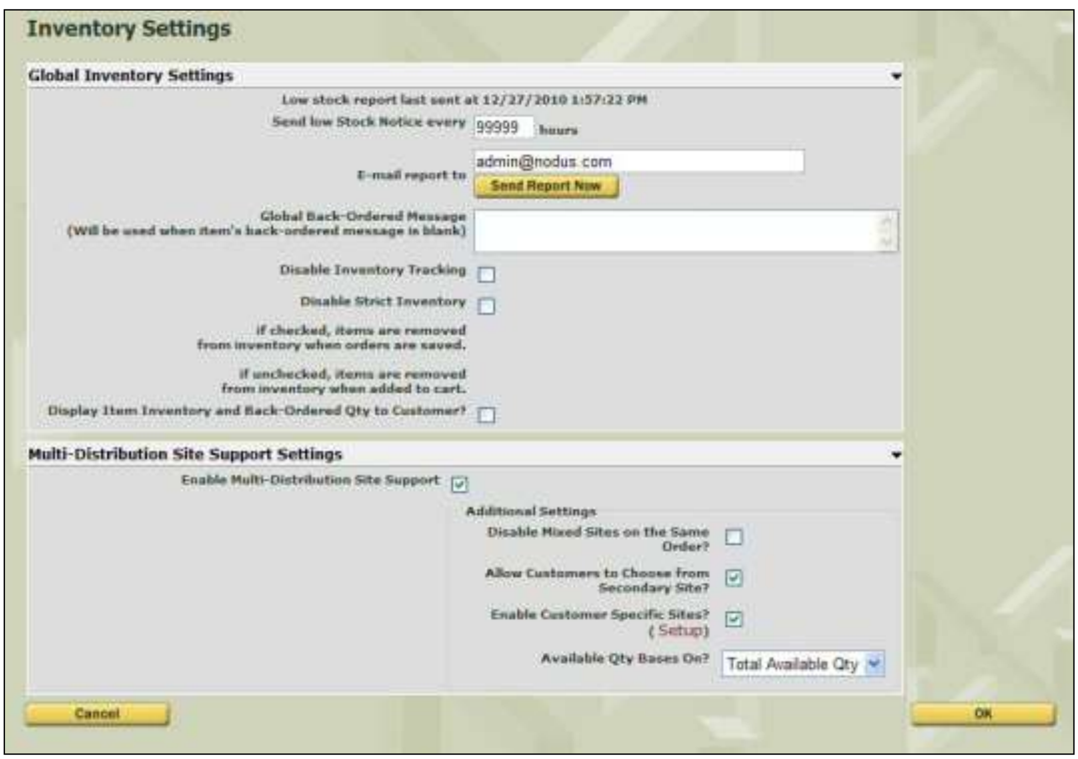
This is where settings for tracking inventory are located. eSSS provides the ability to set up both a single distribution site inventory as well as enable multi-site controls. Settings for each inventory methods are described in the following sections. Features include:

- Low stock notices
- Inventory tracking
- Multiple site support
- Back order messaging

4.9.7.1. Global Inventory Settings

*Administration website location: **Settings** > **Inventory Settings** > (Global Inventory Settings)*

This location is where the single distribution site settings are located. Use the accompanying table to configure the inventory settings.



4-168 Inventory Settings

SETTING	DESCRIPTION
Low stock report sent at	Located at the top of the window, this one line update refers to the last date and time a low stock report was issued.
Send Low Stock Notice Every < > hours	Enter a time in hours for a low stock report to be generated.
E-mail report to	Enter a recipient e-mail address for the low stock report. Click the **Send Report Now** button to send a report immediately.
Global Back-Ordered Message	Enter a custom message to be displayed on the store with items that are out-of-stock.
Disable Inventory Tracking	System will always assume items are in stock when inventory tracking is disabled. Inventory quantity will no longer be synchronized with GP. Re-enabling inventory tracking will require manual import of all items to import the correct inventory count.
Disable Strict Inventory	Strict Inventory allows the store to remove items from inventory when a user/customer adds an item to the cart. Optionally, you may disable this feature by clicking the Disable Strict Inventory, in which case items will only be removed from inventory when orders are saved. Additionally: • If checked, items are removed from inventory when orders are saved. • If unchecked, items are removed from inventory when added to the Shopping Cart.
Display Item's Inventory and Back Order Qty to the Customer?	Marking this checkbox allows the customer to view inventory and back ordered quantities for all inventory locations on the product detail page.

4.9.7.2. Multi-Distribution Site Settings

*Administration website location: **Settings** > **Inventory Settings >** (Multi-Distribution Site Settings)*

Options under this section are only available with Multi-Distribution Sites Support add-on module.

This feature provides inventory support on multiple GP distribution sites. Several configurable options can be set in the Admin section which includes:

- Displaying available product quantities from all sites
- Allowing customers to pull products from a specific site
- The ability to control whether certain products can or cannot be pulled from a site

SETTING	DESCRIPTION
Enable Multi-Distribution Site Support	This option allows customers to select site-specific inventory for line items from a drop list where needed. The inventory site drop list is located in the: • Quick Order Entry page • Shopping cart • Product detail page • Category page • Search page **NOTE:** When disabled, the site default site ID is used on the order line item.
Disable Mixed Sites on the Same Order	Checkmark this option to enforce a policy prohibiting two line-items from different distribution sites from being entered on the same order.
Allow Customers to Choose from Secondary Site?	Check marking this option displays a site selection dropdown list to the customer, allowing the customer to order from available distribution sites.
Enable Customer Specific Sites	Checkmark this option to enable restrictions on customer specific sites. This restricts the customer's ability to purchase only from the sites allowed by setup. **NOTE:** Click the Setup link and properly configure the site restrictions prior to enabling this feature. Refer to section under **Catalog** > **Customer Specific Sites** for detailed information.
Available Qty Based On?	This option allows you to select what inventory criteria is used to determine the product available quantity. It controls how the system should determine the

	backorder status for products. Selecting **Total Available Qty** sets the system to use the sum of available quantities from all sites. **Example:** "Site A" contains available quantity of 30, and "Site B" contains available quantity of 20 – the total available quantity of 50 can be purchased before the product goes into backorder. Selecting **Individual Site Qty** sets the system to check the available quantity against the Site ID on the line-item. **Example:** "Site A" contains available quantity of 30, and "Site B" contains available quantity of 20 –the available quantity of 30 can be purchased against "Site A" before backordering from "Site A" starts, and the quantity of 20 can be purchased against "Site B" before backordering from "Site A" starts.

4.9.8. Mail Server

*Administration website location: **Settings** > **Mail Server***

- Specify the SMTP mail server that eSSS should utilize for relaying e-mail messages. This must be properly configured in order for eSSS to send any e-mail messages.
- Mail Server Administrator's assistance required – The mail server will needs to be setup to either permit relay from the web server, or through Basic SMTP user authentication.
- Leave **Use Basic SMTP Authentication** unchecked if the mail server is setup to grant the web server relay permission via IP, otherwise checkmark the option and input the proper username and password setup by the mail server administrator.
- To send a test message, enter an e-mail address in the **To** field and click the **OK** button

4-169 Mail Settings

4.9.9. Order Options

*Admin Site Location: **Settings** > **Orders***

Order options allow settings to be configured for orders on the shopping cart. Each option is described in the accompanying table and graphic.

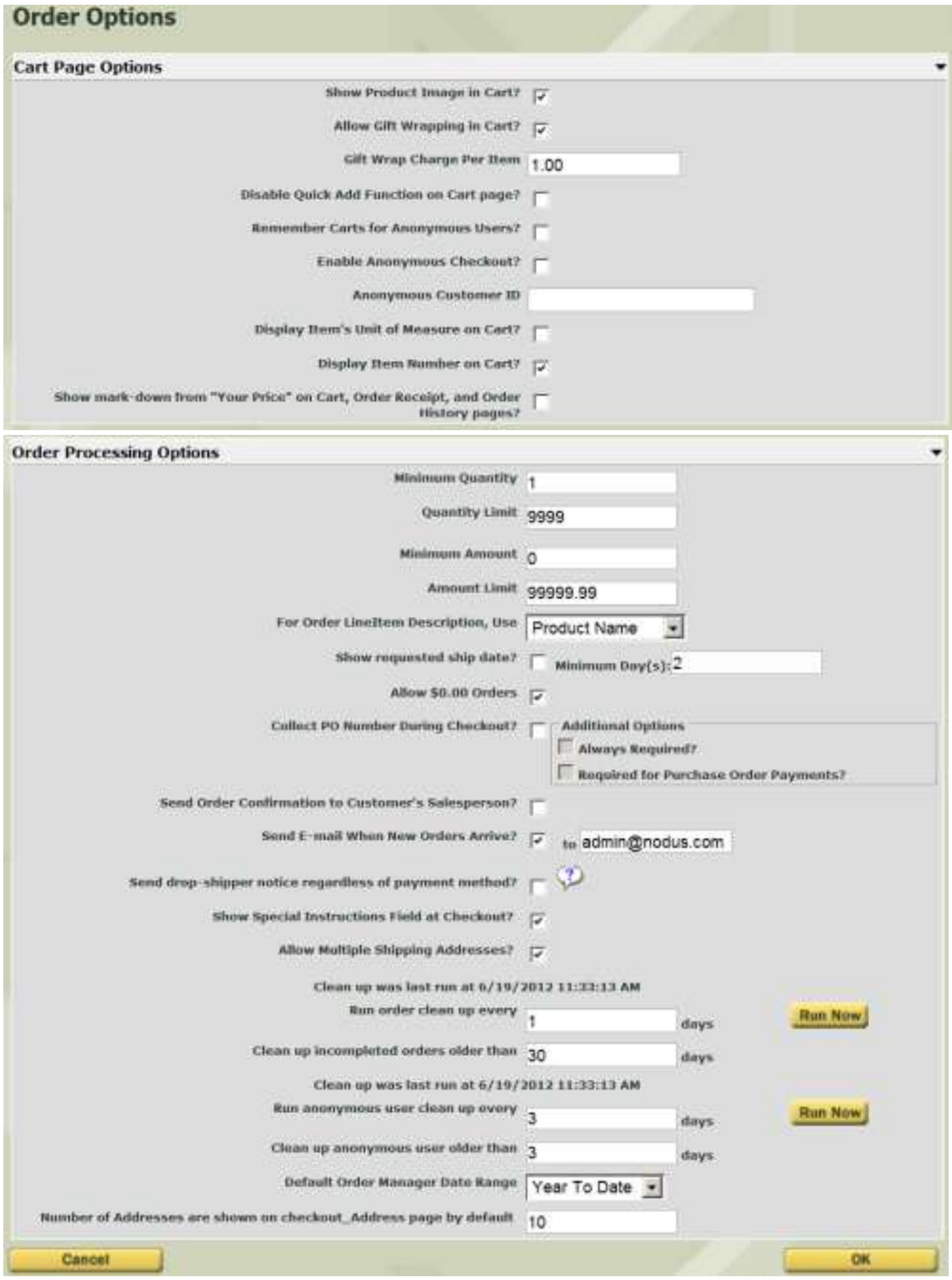
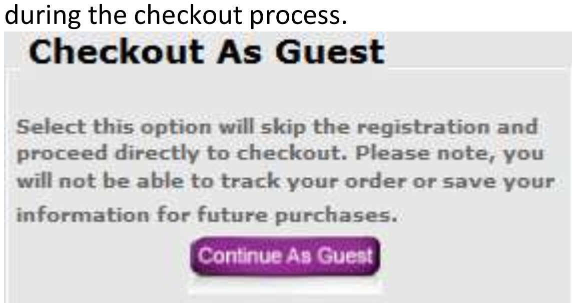
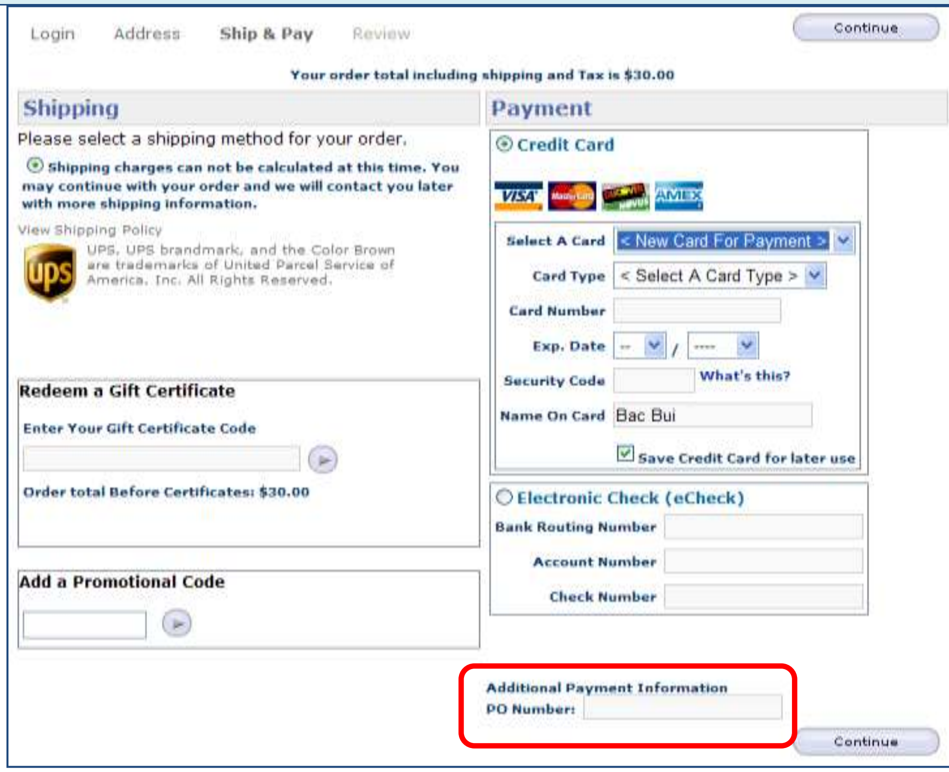


Figure 4-170 Order Options

SETTING	DESCRIPTION
Cart Page Options	
Show Product Image in Cart?	Marking this option allows the customer to see the product image associated with the line item in the Shopping Cart
Allow Gift Wrapping in Cart?	Allows a Gift Wrapping option to be displayed in the Shopping Cart
Gift Wrap Charge Per Item	Permits the webstore administrator to set a per item charge for gift wrapping through entering a price in the gift wrap textbox.
Disable Quick Add Function on Cart page?	This option will hide the Quick Add feature on the Shopping Cart page
Remember Carts for Anonymous Users?	This feature uses cookies to retain cart information for customers who do not log onto the website. Cart information is retrieved through the cookie when the website is browsed from the same computer again. (This feature should be considered independent from the Anonymous checkout feature.)
Enable Anonymous Checkout	Anonymous Checkout Feature. Checkmark to enable the feature. When enabled, customer will be offered to checkout as guest on the Login page during the checkout process. 
Anonymous Customer ID	Anonymous Checkout Feature. Value entered in this textbox will be used as the Customer ID for all orders placed from Anonymous Checkout. This record will not be stored on the website, and changes in GP against this record will not be synchronized back to the website.
Display Item's Unit of Measure on Cart?	Enabling this function will display the line item's unit of measure – single, case, etc. on the Shopping Cart.
Show Mark-Down from the List Price on Cart, Order Receipt and Order History pages	This option permits any item markdown amount to be displayed on the Shopping Cart, Order Receipt and Order History pages.

SETTING	DESCRIPTION
Order Processing Options	
Minimum Quantity	Set the minimum quantity required to complete an order.
Quantity Limit	Set the maximum quantity allowed per order.
Minimum Amount	Set the minimum amount on the subtotal required to process an order.
Amount Limit	Set the maximum amount on the subtotal which can be ordered.
For Order Line Item Description, use	Allows either the Product Name or Short Description to be selected from a droplist for use in the line item description.
Show requested ship date?	If enabled, allows the customer to enter a requested ship date for the order. 
Minimum Days	Displays a minimum number of days before the order can be shipping when the Show requested ship date feature is enabled. For example, if '7' is entered, the default date shown on the form (see above) would be seven days from the current date.
Allow $0.00 Orders	Allows orders of $0.00 grand total amount to go through, such as free offers, when a checkout process of the order is required.
Collect PO Number During Checkout?	Mark the checkbox to enable a textbox on the Checkout confirmation page, used to collect purchase order number during the checkout process.

SETTING	DESCRIPTION
	 **NOTE:** There is a 20 character limit for the purchase order textbox.
Always Required?	If this option is enabled, a purchase order number will always be required to complete checkout.
Required for Purchase Order Payments?	If this option is enabled, a purchase order number will be required to complete checkout for customers selected to use Purchase Order as their payment method. The purchase order number input textbox will be optional for customers selected other payment methods for their order. **NOTE:** If the **Always Required** option is enabled, this setting will be deactivated and grayed out; If the **Collect PO Number During Checkout** option is not enabled, this setting will be deactivated and grayed out.
Send Order Confirmation to Customer's Salesperson	Mark to enable e-mailing to the customer's designated salesperson. Salesperson ID and its e-mail address are collected from setup in GP.
Send E-mail When New Orders Arrive	If checked, the recipient address that was set here will receive an order notification. Multiple addresses can be separated by a comma
Send drop shipper notices on Authorization and on	Enables the drop shipper email notice. Currently only supports orders paid by credit card. The drop shipper notice is sent to the manufacturer or vendor

SETTING	DESCRIPTION
Charge	specified on the item when order is placed on eSSS.
Show Special Instructions Field at Checkout	If checked, displays a multi-row entry box for shoppers to enter special instructions, if any during checkout. The value entered will be sent to Great Plain's SOP Comments field.
Allow Multiple Shipping Addresses?	If checked, gives the customer the ability to specify a different shipping address for each line-item.
Run order clean up every:	Sets how often the Order Cleanup process should run. If cleanup is desired right away, click the **Run Now** button.
Clean up incomplete orders older than	For shoppers that added items to their cart, the cart contents will attempt to be restored when the shopper signs in the next visit. A shopper may not return and therefore a cleanup process is run every X days to purge the old data. This value sets the number of days a cleanup is run to purge old cart data. During the order cleanup process, orders older than the date specified will be purged.
Default Order Manager Date Range	This drop down list gives you nine different date range options for displaying orders in the order manager.
Number of Addresses are shown on checkout_Address page by default	Allows the user to set the number of addresses shown on the Address page during checkout.

4.9.10. Payment

*Administration website location: **Settings** > **Payment***

The eSSS shopping cart offers many payment options such as online and offline credit card processing, PayPal payments, Purchase Orders, Telephone/Email, Fax, e-mail, and check by mail options. Configure the payment settings as described in this section providing description and instruction information as required.

4.9.10.1. Credit Card Payments

The following details explain how to configure eStore Solution Stack to accept credit card and electronic check payments.

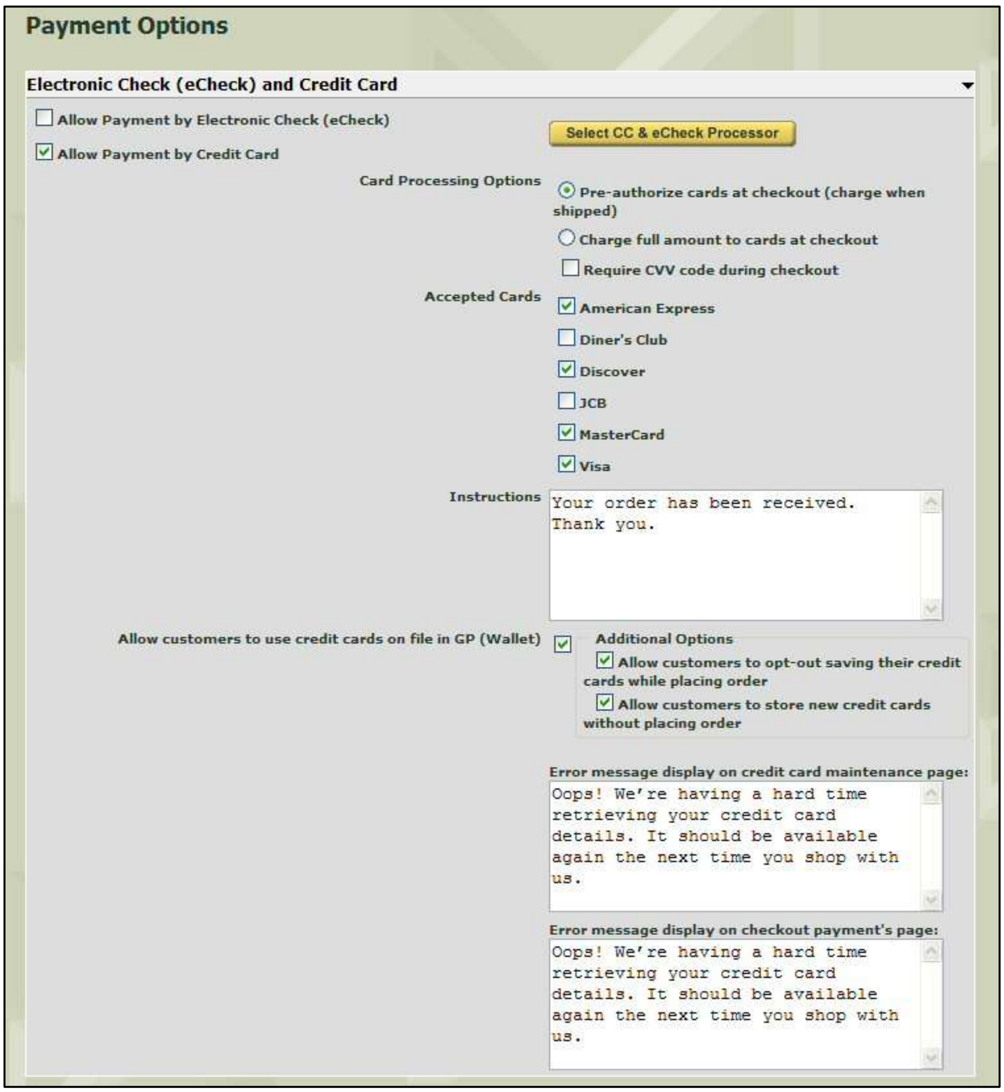
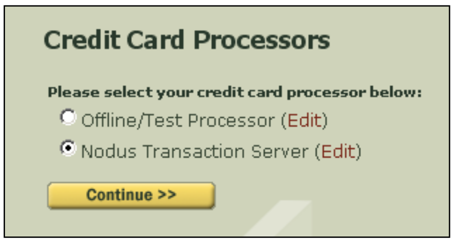


Figure 4-171 Setting up electronic payments

4.9.10.1.1. Setting up the Payment Gateway

This portion of the setup identifies the processor Setup ID used to process electronic payments.

1. Start by marking the checkbox(s) for credit cards and/or eChecks
2. Click the **Select CC & eCheck Process** button
3. Click **(Edit)** for either the Offline/Test Processor if working in a test environment or Nodus Transaction Server if preparing to go into live production



4-172 Credit Card Processors

4. The **Edit Credit Card and eCheck Process** page opens
5. Enter the Setup ID for credit cards and/or eCheck payments
6. Mark the **Use AVS** checkbox to have the account address verified by the payment processor. If the address stored in Great Plains does not match the payment processor's records, the payment will be declined.
7. Click the **Save Settings** button
8. When the **Credit Card & eCheck Processors** page opens, mark the test or live product option and click the **Continue** button to return to the main Payment page

SETTING	DESCRIPTION
Pre-authorize Cards at Checkout	Book transactions are processed and sent to back office with the SOP document. Credit card provided at time of checkout will have the fund authorized and reserved for a limited amount of time (based on the card's issuing bank). The fund can be captured later using CCA from GP once the record is submitted to the back office. Refer to the CCA User's Guide for additional details on CCA operations.
Charge Full Amount to Cards at Checkout	Sale transactions are processed and sent to back office with the SOP document. Payment line is also inserted on the SOP document.

	Credit card provided at time of checkout will be charged the full amount. Referenced transactions can be done through CCA from GP once the record is submitted to the back office. Refer to the CCA User's Guide for additional details on CCA operations.
Require CVV Code during Checkout	Requires verification of the account's CVV security code. If the CVV code stored in Great Plains does not match the payment processor's records, the payment will be declined.
Accepted Cards	Mark the checkbox by the credit cards accepted by the website: • American Express • Diner's Club • Discover • JCB • MasterCard • Visa
Instructions	Add any instructions or acknowledgements to be displayed. These instructions are displayed on the Checkout receipt page
Allow customers to use credit cards on file in GP	Marking this checkbox permits customers to select credit cards stored in Great Plains.
Allow customers to decide if new credit card will be saved on file in GP	Conditional on allowing use of GP-stored credit cards, this feature gives customers the ability to save new credit cards in Great Plains
Allow customers to create new credit card	Conditional on allowing use of GP-stored credit cards, this option allows customers to enter a new credit card to pay for the order.
Existing Card Display's error message at Credit Card Maintenance	This error message is displayed when there is a technical communication problem; for example, if eSSS is unable to communicate with Great Plains. This error message would be displayed after an unsuccessful credit card processing attempt.
Existing Card Display's error message at Checkout	Enter an error message to be used if customer credit card is not successfully processed.

4.9.10.2. PayPal Payments

If accepting PayPal payments, fill up the **PayPal username** field with your receiving account's user name and mark the **SandBox (test) mode:** checkbox to enable the test mode.

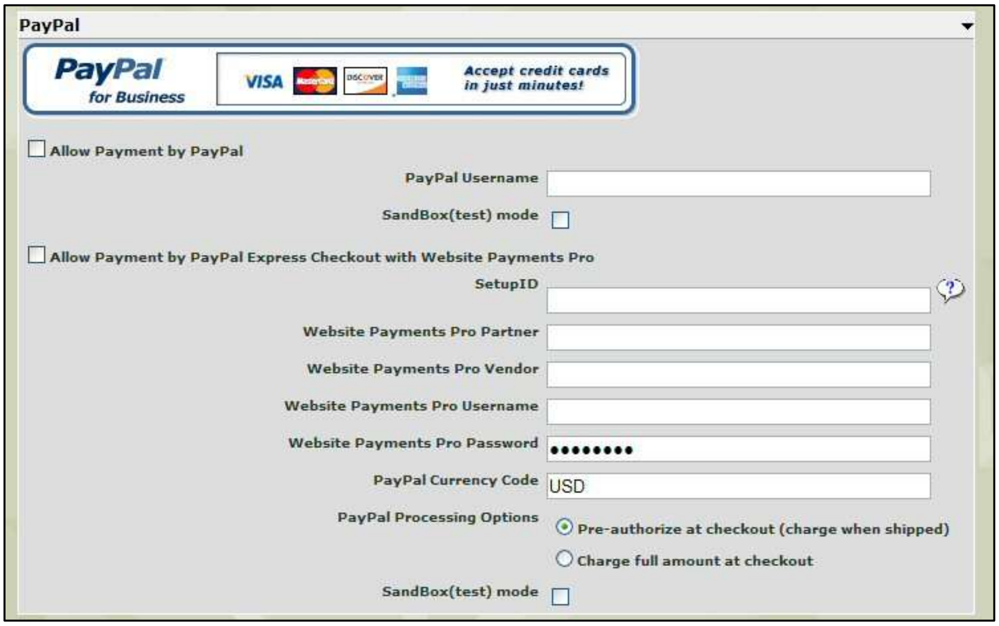
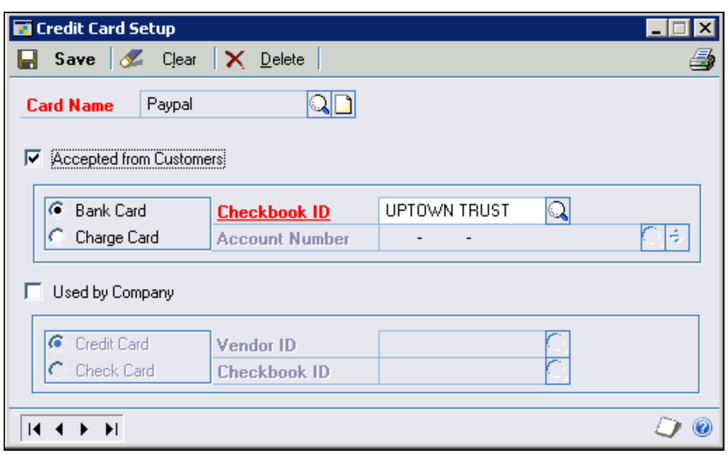


Figure 4-173 PayPal Payments

Other initial setup requirements are listed below:

In Great Plains, a "PayPal" Credit Card Name must be set up to accommodate the PayPal payments as credit card payments from the store. Go to **Tools** > **Setup** > **Company** > **Credit Cards** and set up the "PayPal" Card Name as a Bank Card under a desired Checkbook name.



4-174 PayPal Credit Card Name

The receiving PayPal account's Instant Payment Notification also needs to be activated for the Store Site. This would be for PayPal to notify the Store that the payment has been made for your account.

4.9.10.2.1. Activating PayPal

1. Log-in to your PayPal account
2. Click the **Profile** sub-tab
3. Click the **Instant Payment Notification Preferences** link in the **Selling Preferences** column
4. Click **Edit**
5. Click the checkbox and enter the store's URL as follows: http://www.mydomain.com/PayPal.aspx where www.mydomain.com is the store's URL
6. Click **Save**

NOTE: If you are unable to find the Receipt Transaction ID on a PayPal Order, the IPN is not set up correctly.

To accept an **active**, non-Sandbox PayPal account, you will need to disable the Sandbox (Testing) tag in the Web.config file located at the Store's root directory on the web server. Just open the file and locate this tag: **<add key="PaypalSandbox" value="Off"/>**. Set the value to "On" if you are still using a Sandbox account and set the value to "Off" if you are using a Live PayPal account.

4.9.10.3. PayPal Express Checkout via Website Payments Pro

To use this option, first sign up for PayPal Express Checkout via Website Payments Pro. The standard PayPal payment process is not supported. **NOTE:** If upgrading and Payflow Pro is already used, a new tender type must be added.

Once the service is activated, check the PayPal Express Checkout via Payflow Pro box. Fill out the following boxes with information provided by PayPal

- Website Payments Pro Partner
- Website Payments Pro Vendor
- Website Payments Pro Username
- Website Payments Password
- PayPal Currency Code

PayPal Processing Options:

- Mark the **Pre-authorize** button to run a book transaction (authorization of the funds) against the PayPal account. Delayed capture can be shipped using Credit Card Advantage in GP once the record is submitted to GP.
- Mark the **Charge Full Amount at checkout** to request a sale transaction to capture the fund at the time of checkout.

Test Mode

Check the PayPal **Sandbox (test) mode** box to enable testing, which allows PayPal transactions to be tested without sending money to PayPal.

NOTE: Although no money will be transferred while this function is enabled, actual data will be sent to the Great Plains server. It is suggested that a sample customer account be set up for testing purposes. As an alternative, any test transactions could be voided in Great Plains.

4.9.10.4. Other Payment Options

This section describes the other forms of payments that can be used on the eSSS webstore. Details are discussed in the following table.

SETTING	DESCRIPTION
Allow Payment by Purchase Order	Checking this box allows customized information to be added to the Purchase Order payment option. • The Description information is added as a line item in the check out page. • The Instructions information appears as a confirmation page. Purchase Order payment options also allow certain payment terms to be specified for a customer. To enable this feature: 1. Click the **Payment Term Restriction** droplist 2. Choose a payment term restriction option 3. Enter the payment term to be allowed or prevented in the textbox below the **Payment Term Restriction** droplist. If multiple payment terms are entered, separate them with a comma. **EXAMPLE:** NET 30, NET 60 4. Click the **Save Changes** button
Allow Payment by Telephone	Checking this box allows customized information to be added to the Telephone payment option. • The Description information is added as a line item in the Check Out page. The Instructions information appears as a confirmation page
Allow Payment by Fax	Checking this box allows customized information to be added to the Fax payment option. • The Description information is added as a line item in the Check Out page. • The Instructions information appears as a confirmation page.
Allow Payment by Email	Checking this box allows customized information to be added to the E-Mail payment option. • The Description information is added as a line item in the Check Out page. • The Instructions information appears as a confirmation page.

Allow Payment by Check by Mail	Checking this box allows customized information to be added to the Check by Mail payment option. • The Description information is added as a line item in the Check Out page • The Instructions information appears as a confirmation page
Allow Payment on Account	This option permits customers with credit accounts to purchase items on account. Marking this box enables eSSS to check the customer's available credit on Great Plains in real-time. Checking this box allows customized information to be added to the On Account payment option. • The Description information is added as a line item in the check out page. • The Instructions information appears as a confirmation page. The On Account payment option also allows certain payment terms to be specified for a customer. To enable this feature: 1. Click the **Payment Term Restriction** droplist 2. Choose a payment term restriction option 3. Enter the payment term to be allowed or prevented in the textbox below the **Payment Term Restriction** droplist. If multiple payment terms are entered, separate them with a comma. **EXAMPLE:** NET 30, NET 60 4. Click the **Save Changes** button

4.9.11. Product Reviews

*Administration website location: **Settings** > **Product Reviews***

Product reviews provide a method for shoppers to provide their feedback on a particular product. Product reviews can also be manually added in the Customer Reviews area of the Catalog admin section as in the case of accepting feedback via e-mail. Product reviews are configured as shown in the figure shown below.

4-175 Product Reviews

4.9.11.1. Product Review Options

The following options can be set from the review screen

SETTING	DESCRIPTION
Show Product Reviews?	Specifies whether or not customer reviews are displayed.
Allow Customer to Create Product Reviews	Gives the option whether to allow product reviews on the website
Moderate Product Reviews	Enables the ability to edit customer reviews if desired
Allow Product Rating	Establishes a "star" system for rating products
Allow Karma scores	Enables a 'Was This Helpful' system for rating the review
Show How Many Reviews at First?	The initial number of reviews shown with the product
Show how many reviews on customer	Controls the number of reviews seen on the customer review page for the product.

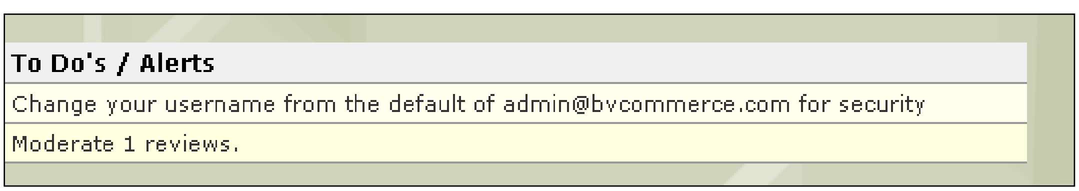
SETTING	DESCRIPTION
review page	

The following is the store web site page that a customer can use to write a review.

4-176 Review Input

Moderation Notices

After a user writes a review, you'll notice a link similar to the following on the To-Do's/Alerts section on the opening page of the Administration area. Clicking on the link will allow you to approve or deny reviews if you have moderation enabled.

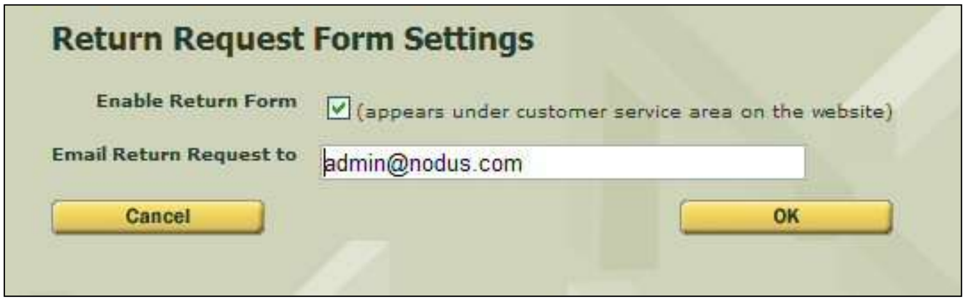


4-177 Moderate Link

4.9.12. Returns

*Administration website location: **Settings** > **Returns***

If **Enable Return Form** is checked, a link will appear in the Customer Service Area to allow a shopper to request a return. Enter the e-mail for the account to receive the e-mail of the request data in the **Email Return Request to** textbox.



4-178 Return Request Form

4.9.13. Shipping

*Administration website location: **Settings** > **Shipping***

This area is to configure the shipping and handling configuration of the store. There are two main areas to be configured:

- Configure Shipping Carrier – Setting up options and required data for carriers such as FedEx
- Configure Shipping Methods – Customizing how and how much your website charges for shipping

4.9.13.1. Configure Shipping Carriers

To configure account settings for shipping carriers:

Click the button for the desired carrier (as displayed in the accompanying figure) and a page for that carrier's settings is displayed.

4-179 Shipping carrier Accounts

4.9.13.1.1. Fedex Settings

Enter the Fedex Settings as detailed in the following table.

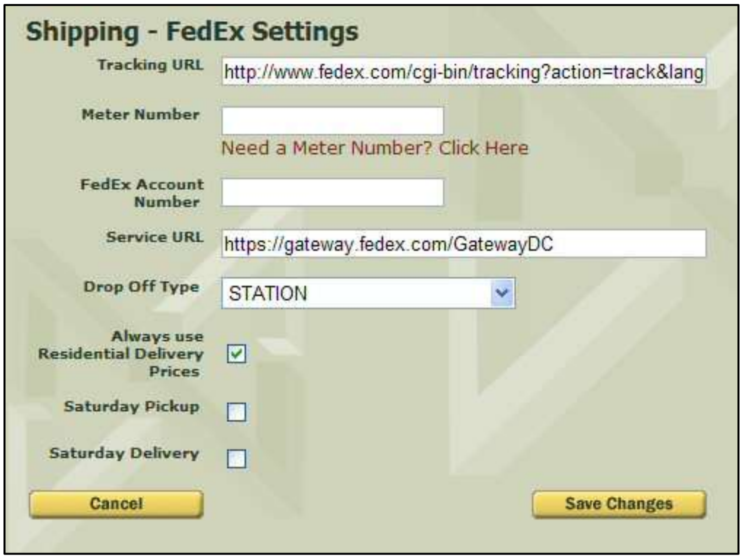


Figure 4-180 Fedex Settings

SETTING	DESCRIPTION
Tracking URL	Enter the Fedex tracking URL in this textbox
Meter Number	Meter numbers are used by Fedex to calculate an account's rates and track rate requests. Click the Need a Meter Number link to generate a Fedex meter number.
FedEx Account Number	Enter the FedEx account number in this textbox
Service URL	This is the address to the FedEx server that eSSS contacts to obtain real-time freight calculations. The value is pre-populated. However, this interface allows the administrator to change the value if FedEx changes their server address.
Drop Off Type	Allows the user to specify the type of drop-off used to hand shipping over to Fedex, including station, request courier, etc.
Always use Residential Delivery Prices	Marking this checkbox enables residential delivery charges to be used for all Fedex shipping orders. Residential delivery prices are the fees charged by Fedex to deliver to a residential unit.
Saturday Pickup	Enables pickup on Saturdays
Saturday Delivery	Enable Saturday delivery.

4.9.13.1.2. UPS Settings

Enter the UPS Settings as detailed in the following table.

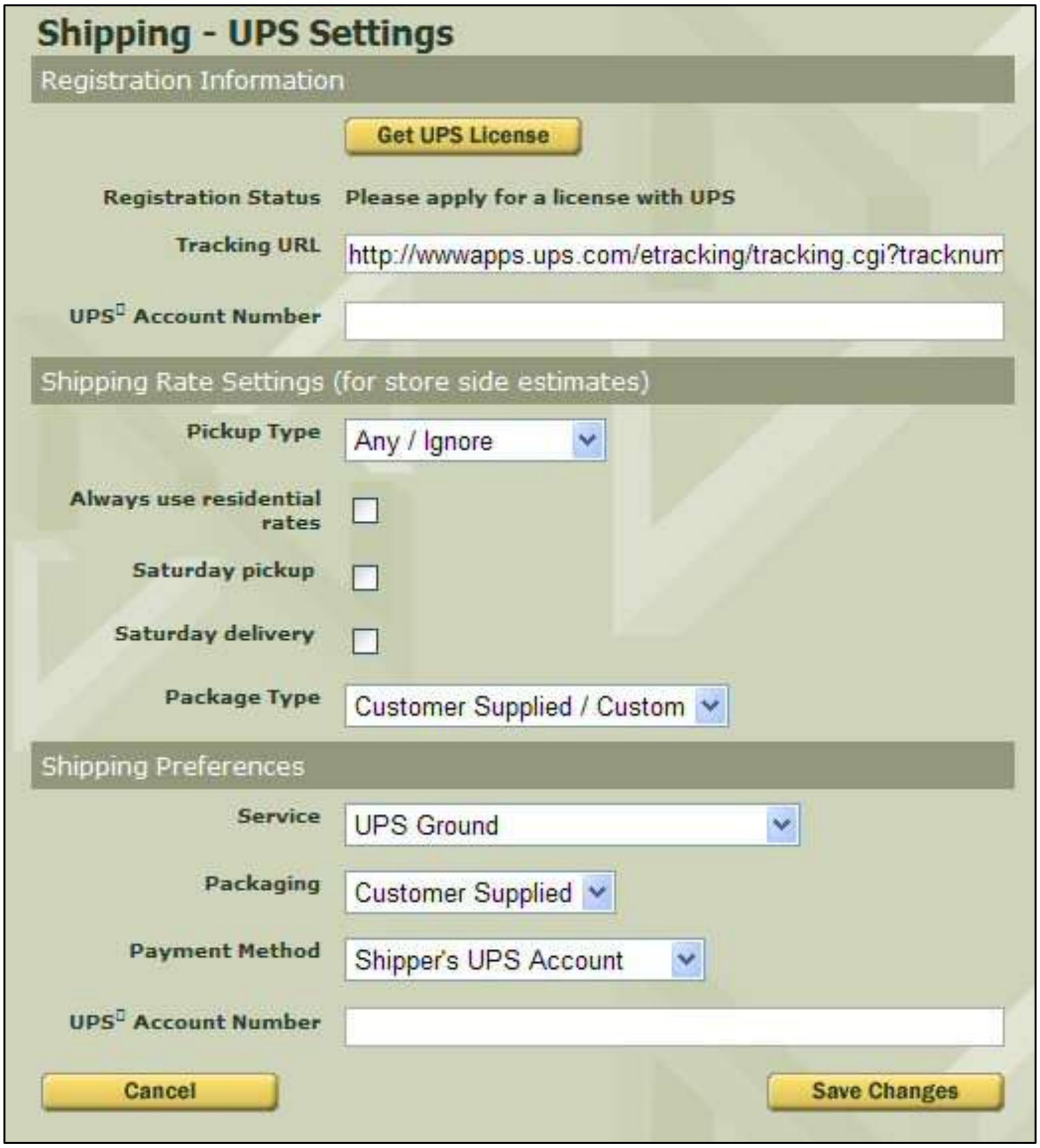


Figure 4-181 UPS Settings

SETTING	DESCRIPTION
Registration Information	
Registration Status	Verification of UPS license. Click on the Get UPS License button to apply for the license.
Tracking URL	Enter the UPS tracking URL in this textbox
UPS Account Number	Enter the UPS account number in this textbox
Shipping Rate Settings	
Pickup Type	Specify a pickup type from the droplist
Always use residential rates	Marking this checkbox enables residential delivery charges to be used for all Fedex shipping orders. Residential delivery prices are the fees charged by Fedex to deliver to a residential unit.
Saturday pickup	Enables pickup on Saturdays
Saturday delivery	Enable Saturday delivery.
Package Type	Choose a package type from the droplist
Shipping Preferences	
Service	Select the type of UPS shipping
Packaging	Specify the type of packaging used
Payment Method	Choose a payment method
UPS Account Number	Enter the UPS Account number

4.9.13.1.3. US Postal Settings

Enter the US Postal Settings as detailed in the following table.

Figure 4-182 US Postal Settings

These settings require a US Postal account. To open a new account, click on the registration link provided on the US Postal Service Settings page.

SETTING	DESCRIPTION
User Name	Enter the USPS account user name
Password	Enter the USPS account password
Server	Add the USPS server location in this textbox
Tracking URL	Insert the USPS tracking URL in this textbox

4.9.13.2. Configure Shipping Methods

Shipping methods can be set up that support real-time shipping calculation (with the common carriers), or will allow admin to setup their own Matrix Freight Table – such as all of the "BV" type of shipping methods. Shipping Methods help customize how products are shipped from the website. These options control:

- Specific shipping methods – Can set by price, weight, per item or use shipping types associated with individual carriers, such as USPS Express Mail or FedEx Ground
- Establishment of shipping price levels for increasing order totals. For example, setting an increasing shipping charge for orders of 1 or more, 99 and more and 1,000 and more.
- Choose a country list where items can be shipping

To set a new shipping method:

1. For each new shipping method, click the **New** button
2. Enter the settings as shown in the table below
3. Repeat for as many shipping methods as needed
4. Click the **Save Changes** button

NOTE: To edit a shipping method, from the list of shipping method, click the **Edit** button for the shipping method to be changed and the **Edit Shipping Method** window opens. Edit as needed and click the **Save Changes** button.

SETTING	DESCRIPTION
Name	Create a name for the shipping method, such as ***Per Item***
Great Plains Shipping ID	Enter the Shipping ID used by Great Plains
Type	Enter the type of shipping – per item, price, weight or a shipping type used by a specific carrier, such as FedEx first overnight
New Level	Sets the increasing shipping costs associated with multiple item orders or by weight. 1. Click **New Level** to set a shipping cost according to the shipping type designated in the **Type** droplist 2. Continue click **New Level** to add as many pricing levels as needed **NOTES:**

	• New pricing levels inserted between already established price levels will be automatically filtered according to amount. For example, if levels are set for packages at 5 and 20 pounds, a new 10 pound level entry would be automatically inserted on the list between 5 and 20 pounds. • For carrier specific shipping types, shipping prices by level is not available
Adjust Price by	Allows the cost of a shipping type to be adjusted by a set amount. The droplist allows the adjusted cost to be set by dollar amount or percentage.
Customer Specific settings	Allow specify shipping method is only available for assigned customers
Ship to Countries/Regions	Creates a list of countries/regions. The list can be changed by clicking the **Add** and **Remove** buttons to shift countries/regions to a Not Available list.

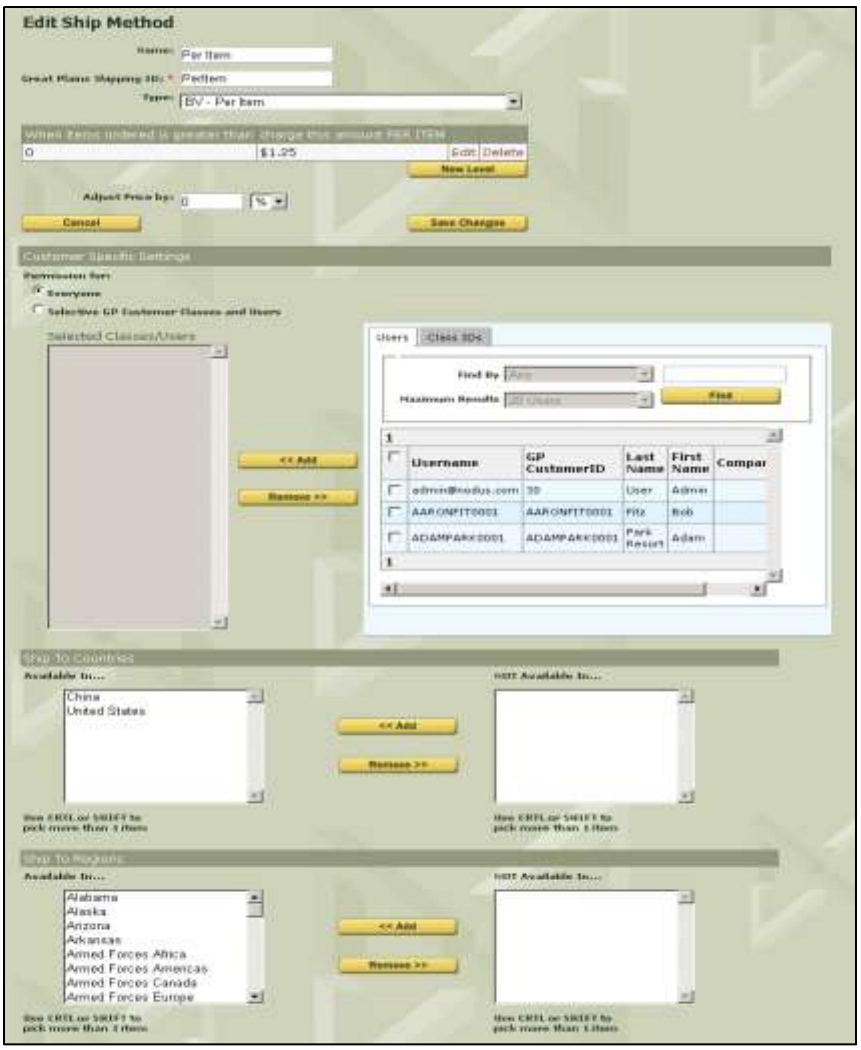


Figure 4-183 Shipping Methods

4.9.13.2.1. Customer Specific setting

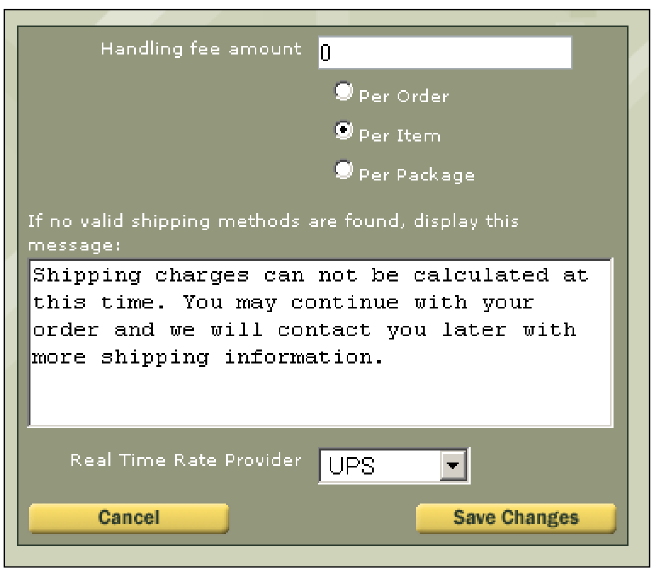
1. Use the Search feature to locate the user(s) to be assigned to the shipping method
2. Mark the checkbox by the user to be assigned to the shipping method
3. Click the **Add** button to populate the Selected Users/Classes window

NOTE: This page gives the option of assigning viewing rights to customers and/or to GP Class IDs. If all users are to be granted viewing rights, the **Everyone** radio button is marked.

4.9.13.3. Handling Fees

On the **Shipping** page, handling charges can be established. To set the handling charge:

1. Enter an amount in the **Handling fee amount** textbox
2. Mark the radio button for the item type:
   - Per Order
   - Per Item
   - Per Package
3. Add a message if a valid shipping method cannot be located
4. Choose a carrier from the **Real Time Rate Provider** droplist
5. Click **Save Changes**



4-184 Shipping Processing Options

4.9.14. Site Terms

Administration website location: ***Settings** > **Site Terms***

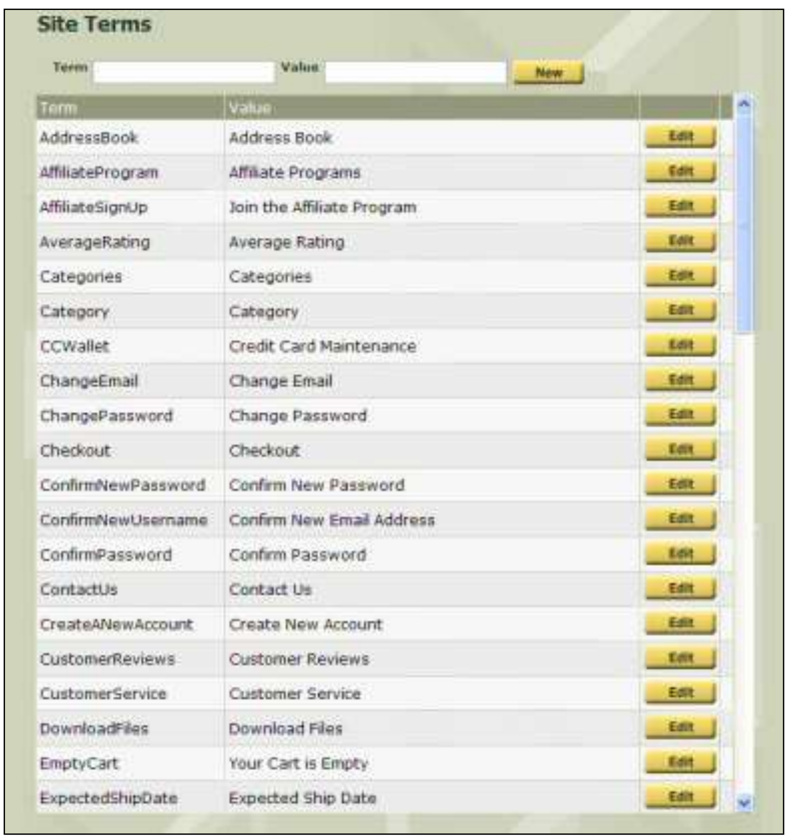
eStore Solution Stack provides a powerful system for localization and customization with a term/value system. Terms are values used internal to eStore Solution Stack and the value is used as the output for the store. Edit term values to control the output displayed to the shopper when terms interpreted for publishing to the web page. For example, if you were to change "AddressBook" to have a value of "Your Address Book", anytime you now see "Address Book" would now be "Your Address Book." Click the **Edit** button to edit term values.

For those coding their own modifications, Site Terms can be called in code such as:

```
lblTest.Text = Content.SiteTerms.GetTerm ("AddressBook")
```

In this case, the `lblTest` would show as an "Address Book"

NOTE: It is strongly recommended **NOT** to delete a factory default term. Only user-defined terms should be deleted if no longer used.



4-185 Site Terms Configuration

4.9.15. Resource Messages

*Administration website location: **Settings** > **Resource Messages***

The General Resources Messages page provides access to resource files used by eStore Solution Stack. Resource files are stored in a local folder and can be selected for editing from this page. To set up and use General Resource Messages:

1. Click the **Clone** button to copy all resource files to a temporary folder
2. To edit a resource file, select a local folder where the files are stored from the **Resource Location** droplist
3. Selecting the location will populate the **Resource File** list
4. Highlight a file and a table detailing the file attributes opens
5. Click the **Edit** button and the key value and comments will become editable
6. If changes are made to the key, click the **Update** button and the changes will be saved in the temporary folder
7. When changes are complete, click the **Update** button at the bottom of the page. All changes will be made permanent in the public folder where the files reside.

NOTE: The final step will cause IIS's application pool to be recycled. All users will lose their current session and be required to log-in again.

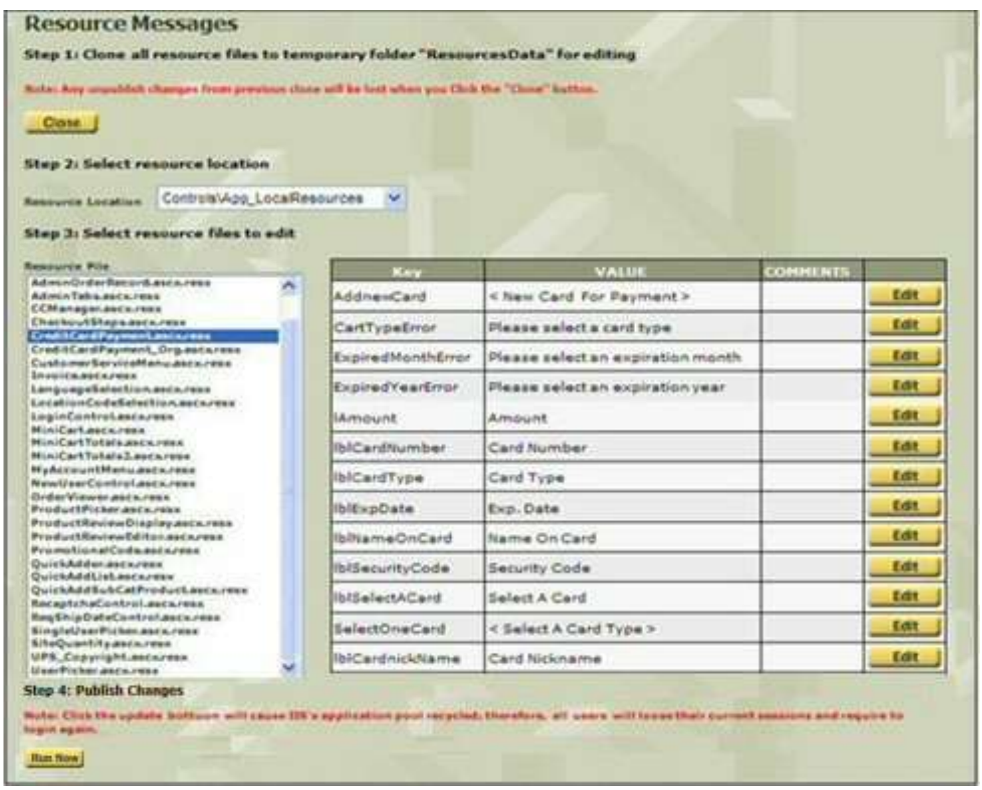


Figure 4-186 Resource Message Settings

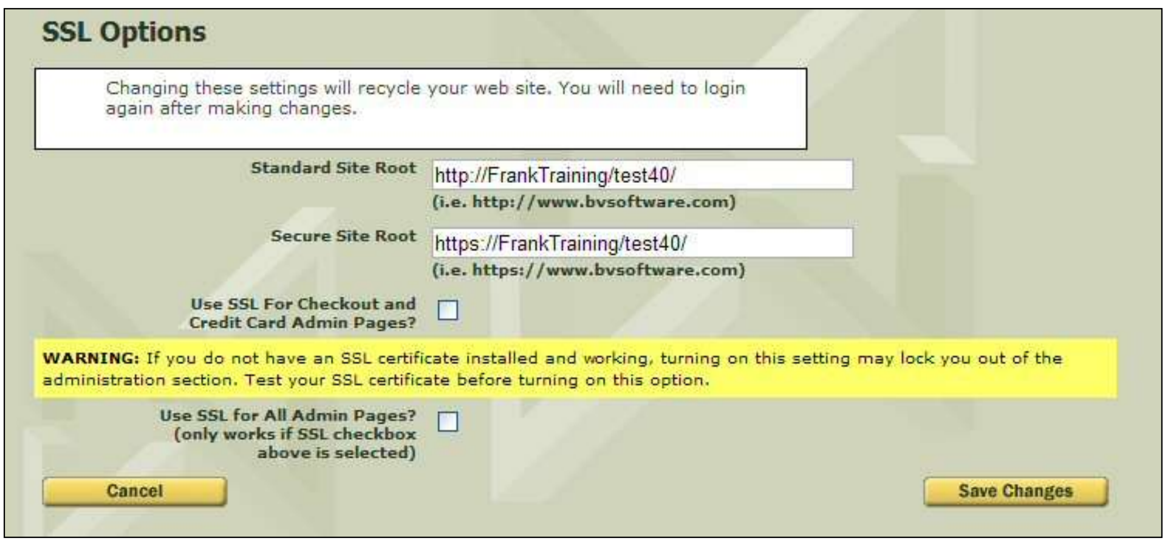
4.9.16. SSL

*Administration website location: **Settings** > **SSL***

Configure the Standard Site URL for the store and the URL for SSL mode to be used during encrypted page views. The Secure Site Root URL will be used when the "Use SSL for Checkout" is checked and a shopper enters the checkout process requiring encrypted protection. Be sure to check the SSL checkbox prior to handling credit card orders or any operation requiring SSL operations. If you are handling manual transactions or phone/fax orders, etc. SSL may not be required.

You also have the option of using SSL for checkout and credit card pages. In addition, you can also use SSL for all of admin pages.

NOTE: Turning the SSL option on for Admin pages and not having a properly configured SSL Certificate can lock you out of the administration section of the website. Make sure the SSL Certificate is set up properly before turning this option on.

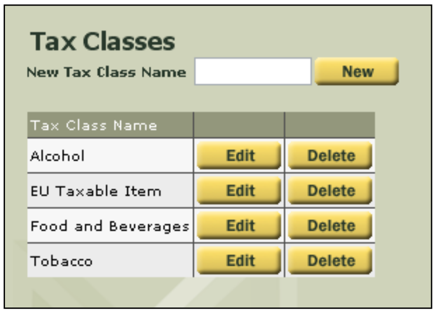


4-187 SSL Settings

4.9.17. Tax Classes

*Administration website location: **Settings** > **Tax Classes***

Tax classes are group classifications of products which can be easily created and edited from the Tax Classes page as described below. These classes can be assigned to products as needed (described under **Catalog** > **Products** > **Editing Products** > **General Information**) and then be used to setup tax calculation based on the Tax Class (described under **Settings** > **Taxes** > **Creating a New Tax**).



4-188 List of Tax Classes

1. Enter name for the tax class in the **New Tax Class Name** textbox
2. Click the **New** button
3. Click the **Edit** button to change the name of a Tax Class

4.9.18. Tax Details

Administration website location: ***Settings*** *>* ***Tax Details***

Tax details are imported from Great Plains. Click the **Import Tax Details from GP** button and the Tax Details will be imported from Great Plains and refresh the tax details list.

To locate a specific set of Tax Detail information, enter the Tax Schedule ID in the **Tax Schedule ID** box and click the **Submit** button.

Tax Details

Import Tax Details From GP

TaxSchedule ID: Submit

TaxScheduleID	TaxDetailID	Description	TaxRate Type	Percentage	TaxAmount	TaxAbleTax
ALL DETAILS	CANABPST-PS6N0	Alberta PST	3	6.00000	0.00000	0
ALL DETAILS	USEXMT-PS0N0	Exempt Sales-USA	3	6.00000	0.00000	1
AUSNSWST+20	AUSSTE-PS20N0	NSW State Tax	3	20.00000	0.00000	0
AUSNSWST-20	AUSSTE-PS20N0	NSW State Tax	3	20.00000	0.00000	0
CANALLGST-7	CANGST-PS7T0	Taxable GST-Canada	3	7.00000	0.00000	1

Figure 4-189 Tax Details

4.9.19. Taxes

*Administration website location: **Settings** > **Taxes***

The Tax section allows an unlimited number of tax setup records to be configured and listed. Click **New** to add a tax record, **Edit** or **Delete** for existing tax records.

4-190 List of Configured Taxes

4.9.19.1. Configuring Taxes

SETTING	DESCRIPTION

Charge Tax on Gift Wrapping	Mark the checkbox to enable this option, where gift wrap charges will be taxed based on customer.
Charge Tax on Non-Shipping Items?	Enables taxes to be charged on items that are not shipped, such as services or file downloads.
Tax Setup Options	Select the method of tax calculation. Options include third party tax tools as described in the **Integrated Tax Tools** section.
Freight Setup	Droplist gives a set of tax options for freight, such as taxable and non-taxable. **NOTE:** This is only for the Standard GP Tax Setup
	Enables taxable and non-taxable options to be configured for miscellaneous items sold on the website. **NOTE:** This is only for the Standard GP Tax Setup

4.9.19.2. Creating a New Tax

Click the **New** button to open the **Edit Tax** window and enter the tax information according to the accompanying table.

SETTING	DESCRIPTION
Type of Tax	Choose a tax type from the droplist
Country	Select the country where the tax will be charged from the droplist
State Region	Select the state/region where the tax will be charged from the droplist
Postal/Zip Code or US City Name	Enter postal/zip code information or enter the name of a city where the tax will be charged
Apply to Items of Type	Choose from a list of item tax types that was set up from the Tax Classes page
Tax Schedule ID	This droplist contains a list of filters that can be used to refine results when looking up Tax Details

4-191 Tax Configuration

4.9.19.3. Standard GP Tax Setup

Website taxes can be set up through Great Plains or several on-line tax services as described in the following section. To set up taxes through Great Plains:

1. Import tax schedules from Great Plains
2. Go to the **Tax Details** page (**Settings** > **Tax Details**) and click the **Import Tax Details from GP** button. The tax schedules will load on a table
3. Start setting up the relationship between the address and tax schedule by navigating to the **Taxes** page (**Settings** > **Taxes**)
4. Select a **Freight** and **Miscellaneous** tax option from the appropriate droplist
5. Initiate tax set up by clicking the **New** button
6. When the **Edit Tax** page opens, choose a tax type from the droplist
7. Specify a tax location from the **Country** and **State/Region** droplists
8. If a smaller, more specific local area needs to be specified, enter a zip code or US city name in the textbox
9. Select what type of item to apply the tax from the droplist
10. Select a specific tax schedule or choose **All Details** to apply all tax details from available tax schedules
11. Click the **Save Changes** button
12. The new sales tax will appear in table on the **Taxes** page

NOTE: Taxes appearing on this table can be edited or deleted by clicking the appropriate button located in the tax type row.

Figure 4-192 Standard GP Tax Setup

4.9.19.4. Integrated Tax Tools

eSSS supports the use of third party applications that provide specialized accounting tax assistance. This enhancement is supported through purchasing an additional module. The modules currently available for third party tax application integrations are:

- Sabrix
- Avalara
- CCH Group

To locate this setup option, navigate to the **Taxes** page and click on the **Tax Setup Options** droplist

Figure 4-193 Third Party Tax Applications

4.9.19.4.1. Setting up Avalara AvaTax

The AvaTax setup form contains information needed to communicate with AvaTax to successfully gather the required tax information. This information should be gathered from AvaTax.

There are some options needed for eSSS. These options are shown in the accompanying table.

SETTING	DESCRIPTION
Allow Checkout when AvaTax web service is unavailable	Allows the checkout process to proceed, even if there are problems gathering tax data from AvaTax (see Avatax Customized Error Message).
Charge Tax on Shipping	Enables tax to be added to shipping charges
Charge Tax on Handling	Enables tax to be added to handling charges
GP Location for Avatax Item Code	Allows the administrator to specify a file in GP as the source of tax code of item
AvaTax Customized Error Message	Allows a customized error message to be entered to handle error conditions such as a communication failure with AvaTax web services.
Send e-mail if AvaTax integration encounters error(s)	Mark this checkbox to send an e-mail notification when an AvaTax error occurs.
E-mail Address	Enter an e-mail address for AvaTax error notification.
Subject	Enter a subject line for AvaTax error e-mails.

Figure 4-194 AvaTax Account Information

4.9.19.4.2. Setting up Sabrix

The Sabrix setup form contains information needed to communicate with Sabrix to successfully gather the required tax information. This information should be gathered from Sabrix.

There are some options needed for eSSS. These options are shown in the accompanying table.

SETTING	DESCRIPTION
Allow Checkout when Sabrix web service is unavailable	Allows the checkout process to proceed, even if there are problems gathering tax data from Sabrix (see Sabrix Customized Error Message).
Charge Tax on Shipping	Enables tax to be added to shipping charges
Charge Tax on Handling	Enables tax to be added to handling charges
Sabrix Customized Error Message	Allows a customized error message to be entered to handle error conditions such as a communication failure with Sabrix web services.
Send e-mail if Sabrix integration encounters error(s)	Mark this checkbox to send an e-mail notification when a Sabrix error occurs.
E-mail Address	Enter an e-mail address for Sabrix error notification.
Subject	Enter a subject line for Sabrix error e-mails.

4.9.19.4.3. Setting up CCH-STO

SETTING	DESCRIPTION
Test Transactions	This option puts eSSS into a test mode where test orders and transactions can be processed through CCH-STO that are not applied to the accounting system.
Allow Checkout when CCH-STO web service is unavailable	Allows the checkout process to proceed, even if there are problems gathering tax data from CCH-STO (see CCH-STO Customized Error Message).
Charge Tax on Shipping	Enables tax to be added to shipping charges
Charge Tax on Handling	Enables tax to be added to handling charges
Use Situs Information	Mark to enable shipping details from Situs
Can Reject Delivery	Choose from the following options: • Yes/No • Not Applicable
Delivery by	Choose from the following options: • Common Carrier • Vendor Vehicle • Not Applicable
FOB (Freight on Board)	Choose from the following options: • Origin • Destination • Unspecified • Not Applicable
Mail Order	Choose from the following options: • Yes/No • Not Applicable
Solicited outside	Choose from the following options: • Yes/No • Not Applicable
Ship from POB	Choose from the following options: • Yes/No

	• Not Applicable •
Customized Error Message	Allows a customized error message to be entered to handle error conditions such as a communication failure with CCH-STO web services.
Send e-mail if *CCH-STO* integration encounters error(s)	Mark this checkbox to send an e-mail notification when a CCH-STO error occurs.
E-mail Address	Enter an e-mail address for CCH-STO error notification.
Subject	Enter a subject line for CCH-STO error e-mails.

4.9.20. Themes

*Administration website location: **Settings > Themes***

eStore Solution Stack allows new themes to be created for the entire store. Currently two themes ship as examples for theme creation. To add themes, create a new folder under "BVThemes." After creating the new folder it will appear as a new theme available in the Settings...Themes section. Follow the existing themes as a guide to creating new themes.

In addition to using the default website themes, there are two options for using themes.

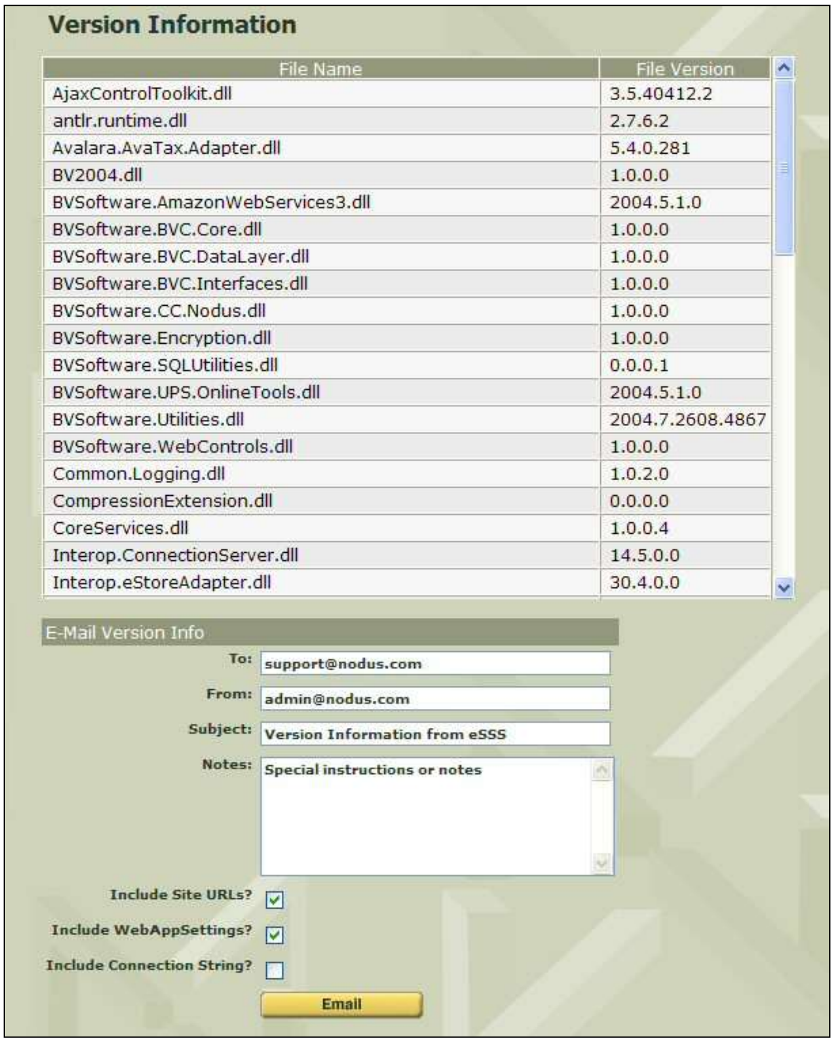
SETTING	DESCRIPTION
Allow Personalized Themes?	When this option is enabled, customers can select a graphic theme for the website from Your Account. The options are the same as shown in the accompanying figure.
Allow Affiliate Themes?	When this option is enabled, the site administrator can choose a new graphic theme for affiliates for the website. The options are the same as shown in the accompanying figure.

4-195 Theme Selector

4.9.21. Version Information

Administration website location: ***Settings*** *>* ***Version Information***

To aid in troubleshooting, use this area to send error information to Nodus Technical Care. Be sure to include as detailed information as you can provide in the Notes section. Click the Email button to send the information to support.

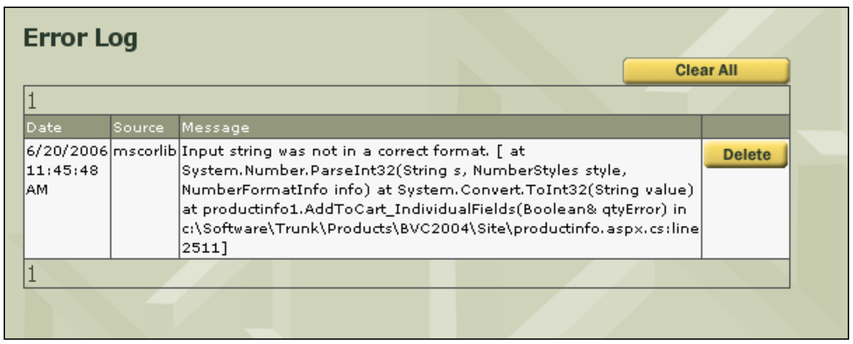


4-196 Version Information

4.9.22. Error Log

*Administration website location: **Settings** > **Error Log***

The error log record errors are triggered during use of the store and captured with the advanced exception management system built into the store software. Click the **Clear All** button to clear the message log to see if an error continues or was a one-time glitch. Information from the error log can be copied and pasted into an e-mail and sent to the support staff. The **Delete** button will clear a single error from the log.



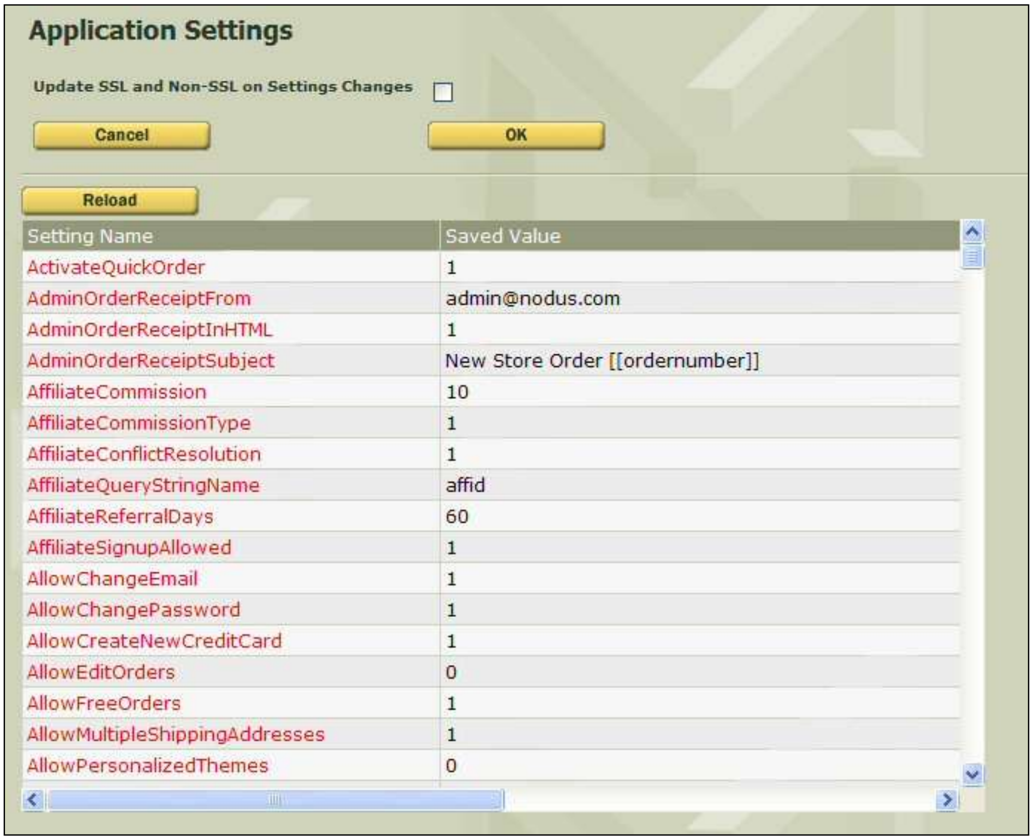
4-197 Error Log

4.9.23. Current Application Settings

Administration website location: ***Settings*** *>* ***Current Application Settings***

This area provides a read-only list view of the store's settings. To automatically update security settings, mark the **Update SSL and Non-SSL on Settings Changes** checkbox.

NOTE: Click the **Reload** button to refresh the Application Settings list.



4-198 Current Application Settings

4.9.24. Fraud Checks

Administration website location: ***Settings*** *>* ***Fraud Checks***

If a customer tries to pass fraudulent checks or behaves in some other improper fashion, eSSS gives store administrators a security feature that allows banning of e-mails, IP addresses, and domain names.

IP addresses can be obtained from the "Merchant Notes" on the "Order Details" screen. Likewise, the e-mail address/domain name can also be obtained from this screen.

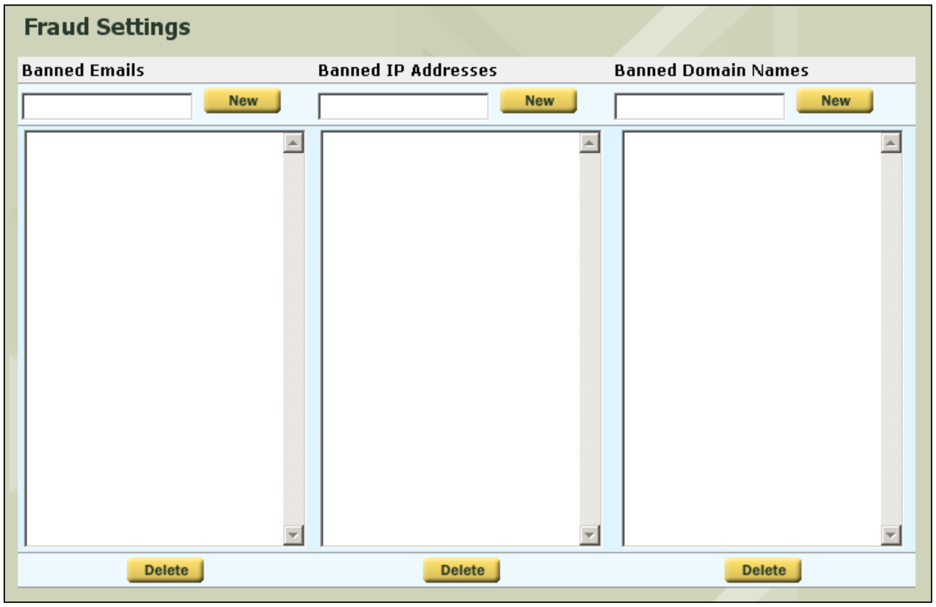


Figure 4-199 Fraud Check Settings

4.9.25. Nodus/Great Plains Settings

Administration website location: ***Settings*** *>* ***Nodus/Great Plains***

These options allow you to define some of the Nodus integration options. Each option is described in the tables below. The first set of options is generally specific to each web order placed on the store.

General Options: All notifications that are not covered in this manual will sent to the address listed in this text box.

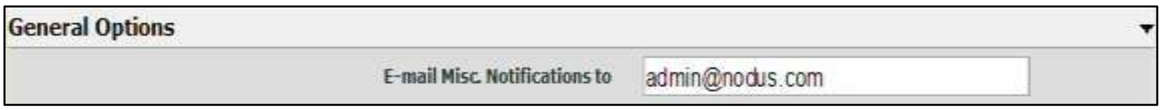


Figure 4-200 General Options

Synchronizer Options: This display is useful to verify the Store ID of what may be one of many store web sites.

IMPORTANT: Clicking the **Reset** link is mandatory if the Store ID has been changed or deleted in Nodus Synchronizer.

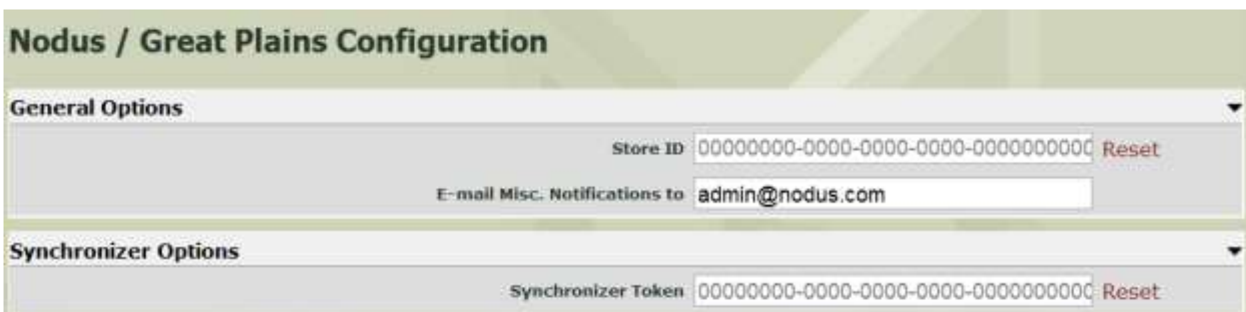
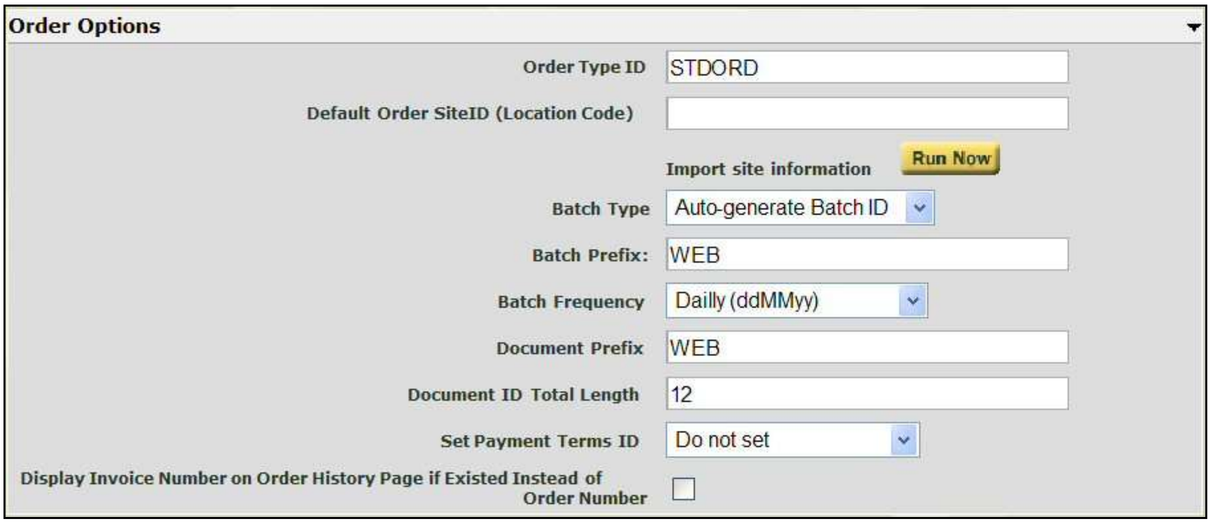


Figure 4-201 Synchronizer Options

4.9.25.1. Order Options

Administration website location: Settings >Nodus/Great Plains > Order Options

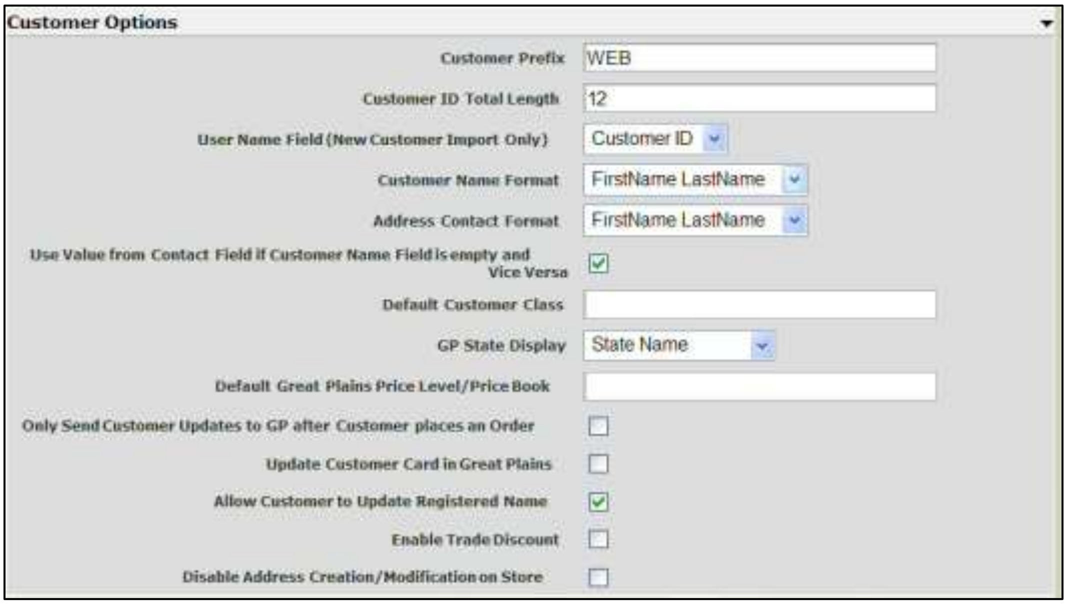


SETTING	DESCRIPTION
Order Type ID	This field defines the type ID that the web order will go into Great Plains as. The value typed into this field must be a value that is in the Great Plains SOP40200 table.
Default Order SiteID (Location Code)	Establishes a default for the order site from an Order Site ID in Great Plains.
Import site information	Press the **Run Now** button to import GP Site information used to properly construct an order. GP Site information is required to correctly calculate shipping. The information also needs to be imported so it can be properly displayed if Multi-Distribution Sites feature is in effect (Multi-Distribution Site Support is a separate add-on module).
Batch Type	There are two options this setting. Either "Auto-generate Batch ID" or "Specify Batch ID" can be selected. Selecting "Auto-generate Batch ID" will let you type in a prefix and how often you want the batch ID to be generated. Selecting "Specify Batch ID" will allow you to enter a single batch ID to use.
Batch Prefix	This entry will only appear if you selected "Auto-generate Batch ID" above. This field allows you to enter a prefix you want the batch ID to start with.
Batch Frequency	This drop down list will only appear if you selected "Auto-generate Batch ID" above. The drop down list contains two options, "Daily" and "Hourly". They determine how often the batch ID is generated.

SETTING	DESCRIPTION
Document Prefix	This field allows you to specify the prefix for the SOP Document IDs on new orders. It is used along with Document ID Total Length setting below to create the full ID.
Document ID Total Length	This field allows you to specify the maximum length of new Document IDs. **NOTE:** The Document ID length must be between 10 to 15 characters. Document IDs are created with a prefix followed by an incremental sequence number. For example if the document prefix is 'WEB' and the document ID total Length is 6, second new order will have a Document ID of 'WEB002', and the number of new orders will be limited to 999.
Set Payment Terms ID	Select either 'Do not set' or 'Use payment method.' The 'Do not set' option is the default. Choosing 'Use payment method' populates the Payment Terms ID on the orders as well as the customer records sent to GP via the payment method selected for each new order. The following Payment Terms are used and must already exist in GP if the corresponding payment method is enabled: 'Check', 'eCheck', 'VISA', 'MasterCard', 'AMEX', 'DiscoverCard', 'DinersClub', 'JCB', 'PaypalEC', 'PurchaseOrder', 'Telephone', 'Fax', 'Email', 'OnAccount', and 'GiftCertificate'.
Display Invoice Number on order history page if existed instead of Order Number	This option will display invoice numbers on the Order History page for orders converted to an invoice and that have an invoice number.

4.9.25.2. Customer Options

Admin Site Location: Settings > Nodus/Great Plains > Customer Options



This set of options is specific to the customer integration of the shopping cart.

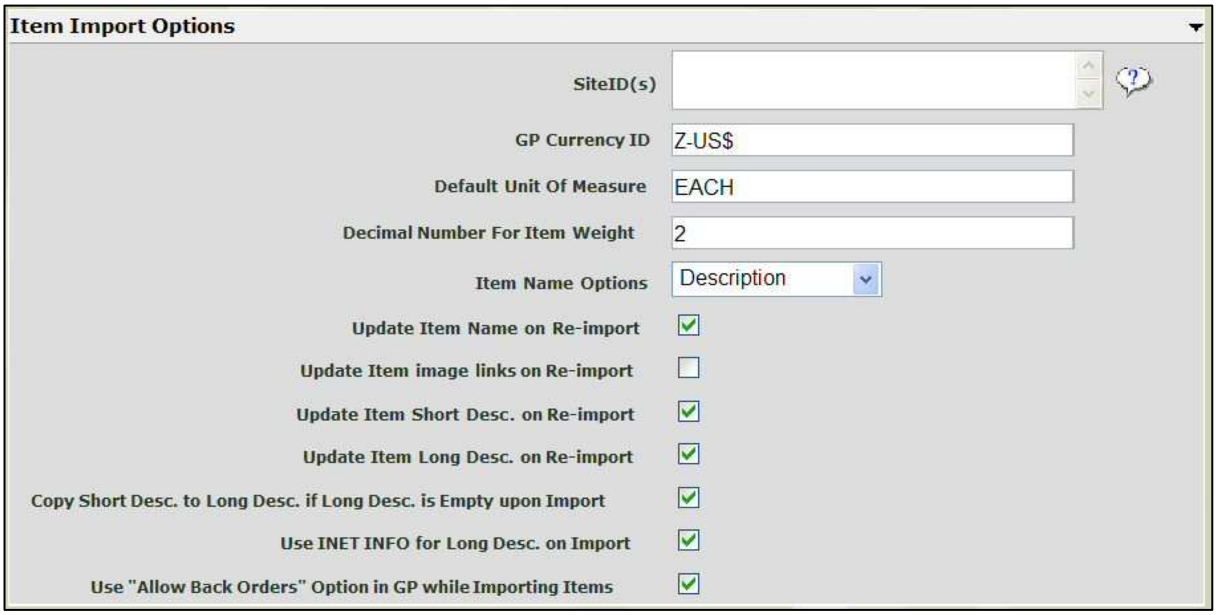
SETTING	DESCRIPTION
Customer Prefix	This field allows you to specify the prefix for the Customer IDs on new customers. It is used along with Customer ID Total Length setting below to create the full ID.
Customer ID Total Length	This field allows you to specify the maximum length of new customer IDs. Customer IDs are created with a prefix followed by an incremental sequence number. For example if the customer prefix is 'WEB' and the customer ID total Length is 6, second new customer will have a Customer ID of 'WEB002', and the number of new customers will be limited to 999. **NOTE:** The Customer ID length must be between 5 to 15 characters.
User Name Field (New Customer Import Only)	Intended for New Customer Imports, this drop down list determines which Great Plains field the customer import should use for the user name. The default setting is "Email" and uses the email address specified in the email field in the internet information card for the Great Plains customer. Other options include "Login" and "Customer ID". The "Login" name is specified in the internet information card of the Great Plains customer. The "Customer ID" setting allows you to import customer IDs as the user name.

SETTING	DESCRIPTION
Customer Name Format	The Customer Name format gives options for how the customer name is displayed, including by: • FirstName LastName • LastName First Name • CompanyName
Address Contact Format	Drop list gives options for how address contact information is presented
Use value from Contact field if Customer Name field is empty and vice versa	Check box gives the option to automatically fill in a value if either the Customer Name or Contact field is empty
Default Customer Class	Sets the default customer class for all customers to be sent in to Great Plains.
GP State Display	This drop down list determines whether the state will go in as the full state name or the abbreviation. The two options are "State Name" or "State Abbreviation".
Default Great Plains Price Level/Price Book	This field allows you to enter the default Great Plains price level that is used when the user is not logged in or the user has the "None" price level set. This field should almost always be filled in unless you are not using price levels. If this field is not used and the customer does not have a price list set the product's list price will be used which may not be the desired result.
Only Send Customer updates to GP after the customer places an order	Mark this checkbox to enable this feature.
Update Customer Card in Great Plains	If enabled, the customer profile in Great Plains will automatically update when an order is submitted with new customer information.
Allow Customer to update Registered Name	Allows the registered name to be updated in Great Plains.
Enable Trade Discount	This feature enables a preferred customer to receive a set discount on anything in the store web site. This discount amount is established in the

SETTING	DESCRIPTION
	Great Plains database.
Disable Address Creation/Modification on Store	Disables the ability to create or edit an address on the store web site.

4.9.25.3. Item Import Options

Administration website location: ***Settings >Nodus/Great Plains > Item Import Options***



These options define settings that are specific to the item import.

SETTING	DESCRIPTION
Site IDs	Enter the GP Site IDs where product inventory is located.
GP Currency ID	Enter the currency ID to be used for the website. The currency ID must be pulled from Great Plains.
Default Unit Of Measure	This field allows you to specify the default unit of measure. It is only used if the unit of measure for an item could not be found. For sites using only one unit of measure you can enter it here. For sites that have multiple units of measure but only wish to use one, the value must be entered here.
Decimal number for Item weight	This field allows admin users to set a decimal number for item weight accordingly to GP setup.
Item Name Options	This droplist allows a choice of description fields in Great Plains for the item.
Update Item Name on Re-Import	These setting controls whether the site allows the Item Name to be updated on re-import or not.
Update Item image	This field controls if the site allows the Item Image Link to be updated on re-

SETTING	DESCRIPTION
links on Re-Import	import or not.
Update Item Short Desc. on Re-Import	This setting gives the option to allow the Item Short Description on the site to be updated on re-import or not.
Update Item Long Desc. on Re-Import	This field controls whether the site allows the Item Long Description to be updated on re-import or not.
Copy Short Desc. to Long Desc. if Long Desc. is empty on import	This setting controls whether to use the short description for Long Description upon importing item - when the long description is empty.
Use INET INFO for Long Desc. on Import	This option allows an item to use the INET INFO field in GP for its long description while being imported to site.
Use “Allow Back Orders” option in GP while importing items	This option allows the site to use the “Allow back Orders” option in GP to control inventory setting on Products’ inventory.

4.9.25.4. Feature Management

*Administration website location: **Settings >Nodus/Great Plains > Feature Management***

This set of options defines settings that are specific to whole features on the shopping cart.

SETTING	DESCRIPTION
GP Pricelist Setup – Extended Pricing	This option effects how pricing from GP is stored when item records are imported from GP. • Use Standard GP Pricing* – This will import the GP Price Lists • Use Extended GP Pricing – This will import Extended Pricing setup from GP • Use Myridas GP Pricing – In addition to GP Extended Pricing setup, family pricing setup using Myridas is also imported from GP • Disable All GP Pricing – No additional pricing setup will be imported – “List Price” on the item record will still be imported. Additional “Volume Pricing” can be setup and maintained on eSSS directly. *Please see Appendix C on this document for detailed diagram explaining the business logic around the Price List data imported from GP.
Make Unit of Measure Selectable	This drop down list allows you to specify whether customers will be able to select the unit of measure they are purchasing with. The values are "Allow Selectable Unit of Measure" and "Disable Unit of Measure Selection". If you have multiple units of measure you can enable this setting to give customers a choice. If you have multiple units of measure and don't want to give customers a choice you must set the default unit of measure setting above. If you have or plan to use only a single unit of measure you can disable the selection and specify the default unit of measure above.
GP Promotional Price Sheet Options	This feature sets up the Great Plains promotional pricing to automatically reject or accept higher/lower promotional pricing by choosing an option from the Promotion Price Sheet Options droplist.
Show credit	This check box allows you to turn off the display and lookup of the credit

SETTING	DESCRIPTION
information to customer	information. Credit limits and credit amounts will only be displayed to the customer if this option is checked.

4.9.26. Debug Logs

*Administration website location: **Settings** > **Debug Logs***

eSSS provides debug logs to help fix problems that might occur. To create a debug lob, mark the file(s) that requires work from the list displayed on the Debug Logs page. Click the Details button to open the log as shown in the "Debug Log Detail" figure.

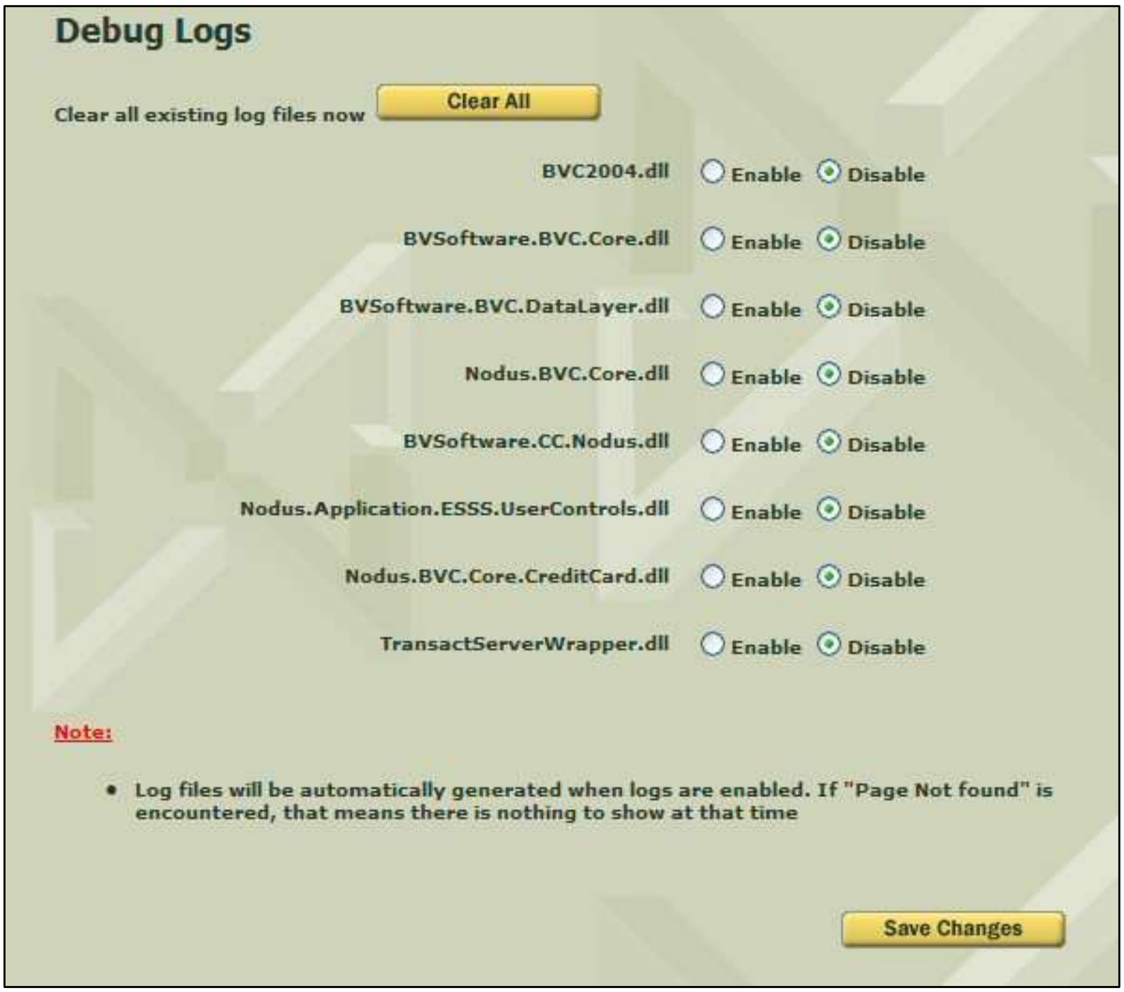


Figure 4-202 Debug Logs page

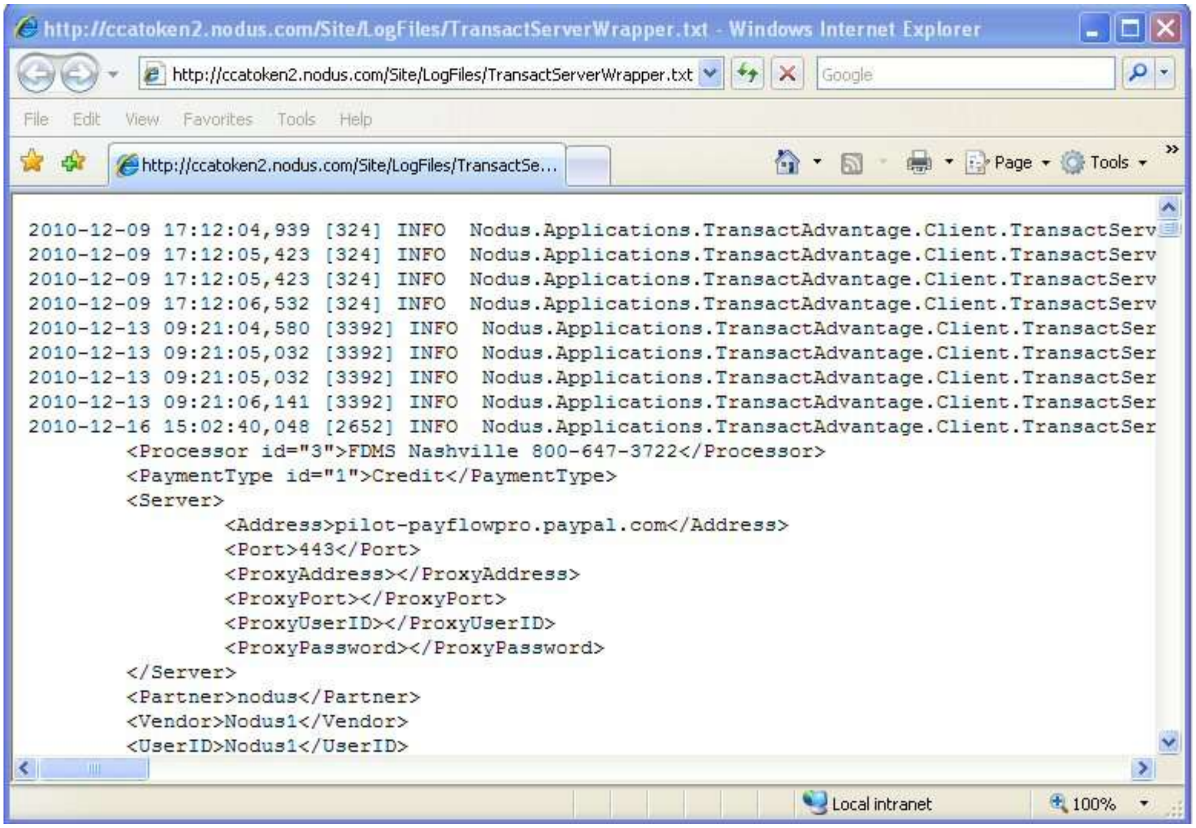
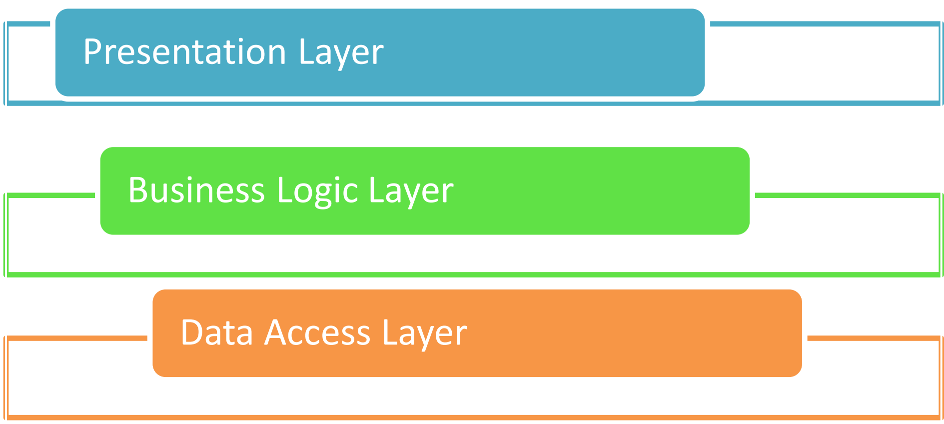


Figure 4-203 Debug Log Detail

4.10. Code Layout

There are three major layers to the eStore Solution Stack shopping cart.

- The first layer, the **Presentation Layer**, is part of the eSSS site. It consists all of the ASP.NET code behind. Under .NET 3.5, it compiles into BVC2004.DLL.
- The next layer is the **Business Logic Layer**. It all belongs in the BVSoftware BVC Core namespace.
- The final layer is the **Data Access Layer**. It all belongs in the BVSoftware.BVC.DataLayer namespace. This layer contains static methods that you can call to run the stored procedures.



4-204 Code Layout

Appendix A – Item Mapping from GP

GP OBJECT	GP FIELD	eStore OBJECT	eStore FIELD
IV00101	ITEMNMBR	Catalog/Product	ID
IV00101	ITMSHNAM	Catalog/Product	ProductName
	168	Catalog/Product	ProductTypeID
IV00105	LISTPRCE [2]	Catalog/Product	ListPrice
IV00105	LISTPRCE [2]	Catalog/Product	SitePrice
		Catalog/Product	MetaKeywords
		Catalog/Product	MetaDescription
		Catalog/Product	MetaTitle
IV00101	TAXOPTNS	Catalog/Product	TaxExempt
	0	Catalog/Product	TaxClass
	FALSE	Catalog/Product	NonShipping
	FALSE	Catalog/Product	ShipSeparately
	ShipFromSite	Catalog/Product	DropShipMode
IV00101	ITEMSHWT [3]	Catalog/Product	ShippingWeight
	0	Catalog/Product	ShippingLength
	0	Catalog/Product	ShippingLength
	0	Catalog/Product	ShippingWidth
	0	Catalog/Product	ShippingHeight
IV00101	ITEMTYPE != 2	Catalog/Product	Status = Active
	ITEMTYPE == 2		Status = Disabled
SY01200	INET4	Catalog/Product	ImageFileSmall

GP OBJECT	GP FIELD	eStore OBJECT	eStore FIELD
SY01200	INET4	Catalog/Product	ImageFileMedium
IV00101	CREATDDT	Catalog/Product	CreationDate
	1	Catalog/Product	MinimumQty
	-1 (none)	Catalog/Product	ParentID
	IndividualFields	Catalog/Product	VariantDisplayMode
IV00102	QTYONHND - ATYALLOC	Catalog/Product	InventoryAvailableQty
	0	Catalog/Product	InventoryLowStockNotice
	Available for purchase	Catalog/Product	InventoryStatus
IV00101	ITEMTYPE == 5	Catalog/Product	InventoryNotAvailableStatus = Available
	ITEMTYPE != 5		InventoryNotAvailableStatus = BackOrderedDoNotAllowPurchase
		Catalog/Product	InventoryNotAvailableMessage
IV00101	ITEMDESC	Catalog/Product	ShortDescription
SY01200	INETINFO	Catalog/Product	LongDescription
	0	Catalog/Product	ManufacturerID
	0	Catalog/Product	VendorID
	1	Catalog/Product	GiftWrapAllowed
IV00101	PRICMTHD	Catalog/Product	PriceMethod

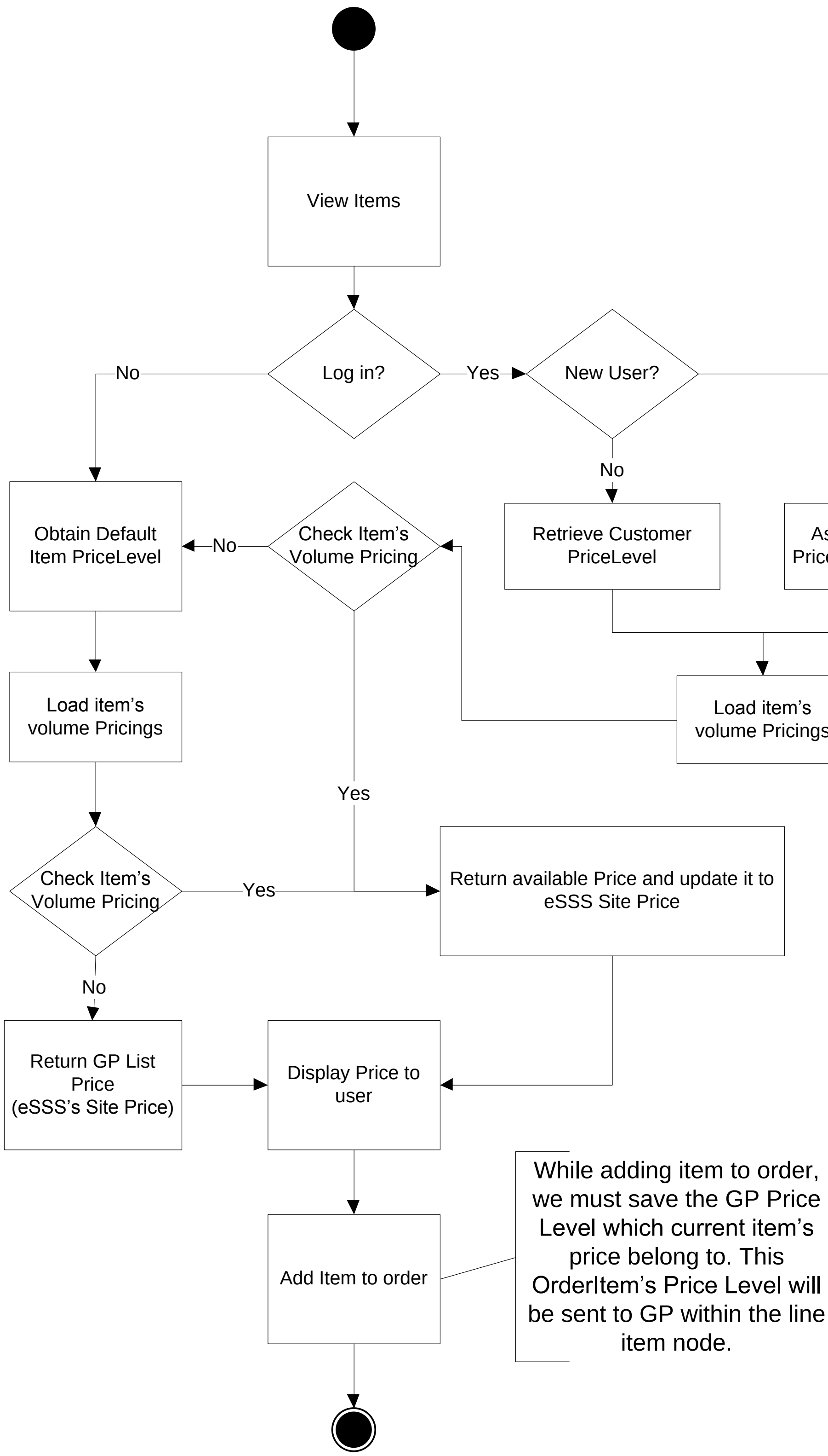
NOTES:

- 168 is the code for a generic product, it is hard coded in the import routine.
- Not all customers use the LISTPRCE as the ListPrice. Some customers have chosen to use a price level's UOMPRICE (IV00108) as the ListPrice.
- For ITEMSHWT the shipping weight is divided by 100 during the import process. A 1 lb. item is stored as 100 in Great Plains.
- For QTYONHND - ATYALLOC, by default the import takes the quantities from all locations/sites. Some customers wish to only import from one location code.

Appendix B – Customer Mapping from GP

GP OBJECT	GP FIELD	eStore OBJECT	eStore FIELD	NOTES
Customer	CustomerID	UserAccount	GPCustomerID	
Customer	Email OR UserID	UserAccount	UserName	Config setting for which field to use as username
Customer	Password	UserAccount	Password	Default Password from config used if password is invalid
Customer	Name	UserAccount	FirstName	Name field split into first name and last name
Customer	Name	UserAccount	LastName	Name field split into first name and last name
Customer	PriceLevel	UserAccount	GPPriceLevel	
Customer	Address/Contact	Contacts.Address	FirstName	Contact split into first name and last name
Customer	Address/Contact	Contacts.Address	LastName	Contact split into first name and last name
		Contacts.Address	CompanyName	
Customer	Address/Address1	Contacts.Address	StreetLine1	
Customer	Address/Address2	Contacts.Address	StreetLine2	
Customer	Address/City	Contacts.Address	City	
Customer	Address/State	Contacts.Address	StateCode	State needed to be converted to 2 digit state code
Customer	Address/Zip	Contacts.Address	Zip	
Customer	Address/PhoneNumber1	Contacts.Address	PhoneNumber1	
Customer	Address/FaxNumber	Contacts.Address	FaxNumber	

Appendix C – Standard GP Pricing Logic



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