User Guide

for

Creation and Administration

of

Web sites and Shops

- Version 6 -

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1. Introduction

Prerequisites

The program is browser-based. The administration will function using the following browsers:

- Internet Explorer 8.0 and higher
- Mozilla Firefox after version 3.6
- Safari 4
- Chrome 4

For administrative tasks, the requires a screen resolution of 1,024 x 786 pixels and a colour depth of at least 65,000 colours. For certain languages (Spanish, French, Catalan, Russian, Portuguese), the pages of the administration only will display correctly with a resolution of 1280 x 1024.

In order to use all the functions of the application, you must enable the following in your browser:

- JavaScript
- Session cookies
- Pop-up windows
- Flash content

About this handbook

This handbook explains basics and shows functions and methodologies.

All basics are explained that that are required to use the application effectively.

The handbook does not provide a full explanation of all functions. It is a supplement to the information available on the administration pages and should be read in conjunction with these. Functions which are self-explanatory or where all important information is already shown on the page are not explained here.

Only functions and processes that are complex and that do not contain all information on the user interface have extra information and notes in the help.

The following multi-step concept should help you to get to know individual functions:

1. First look for the intuitive usage and meaning of fields and information.
2. Read the information in the blue box on the side of the page. (For example, about how to set up a payment method)
3. Read the short information about the fields that are not self-explanatory. This short information is shown by a symbol behind the respective field.
4. Read tips and tricks that are shown for certain functions.
5. Look at related topics that discuss connections.
6. Open the online Help.

Additional information is available on the user blog and in the video tutorials that you can access in the MBO. Links to these are shown in the Help area of each page.

2. Quick start / First steps

Once these steps have been performed, the Web site is basically ready for use. However, there are many other options for optimising the Web site in respect of your own needs.

After completing the following steps, your Web site is ready for use:

1. *Sign in*
2. *Run through the Setup assistant*
3. *Check the site/pages*
4. *Check/place the main page elements*
5. *Modify the design*
6. *Create products*
7. *Check important system settings*
8. *Test the site*

1. Sign in

Details on how to access the Administration section of your web site are provided by your provider. Sign in to the Administration section using the username and password. This information has either been sent to you or you have already defined it yourself in the course of setting up the web site.

Caution: After running the Setup assistant, the first thing you should do is edit your password so that no unauthorised person can use the system. See *Administrator data*, *on page 35*.

2. Run through the Setup assistant

The first time you sign in, the Setup assistant will automatically take you through the initial steps. The assistant will help you configure the main settings for your site. For more about this, see *Setup assistant*, *on page 33*.

3. Check the site/pages

The site topic selected in the Setup assistant determines the basic structure of your Web site. To view this structure, select **Content / Categories** › **Preview**.

This preview allows you to verify that the main pages with which you want to launch your site are in place. You can add, delete or move pages at this stage. Check the content on each page, and update it as required. You will find more detailed information on this in the section *Content*, *on page 93*, et seq.

The most important aspect of this stage of the setup process is that you check the existing sample content for its appropriateness for your requirements, and make any modifications you need.

4. Check/place the main page elements

Page elements represent the functionality of the Web pages – they are the means by which your customers can operate the various functions and browse your site. These page elements include, for example:

- Link to Terms and Conditions and Privacy Policy
- The categories tree, or a list of categories that provides access to individual product categories and products
- The Search function
- The sign-in function for registered users
- Functions to switch language and currency
- Shopping basket

Depending on the topic you have selected, the most important associated page elements will be displayed on each Web page. Check whether the necessary elements are correctly placed.

You can find information on the basic principles of design and working with page elements in *DesignDesignon page 113 page 115Page elements and navigationPage elements and navigationon page 121*.

5. Modify the design

Your selection of a topic for the site determined the matching site design. If required, you now have many options for modifying the design. The section *Design*, *on page 113* contains a detailed description of how to customise the layout and design.

6. Create Products/Services

If you want to operate an online shop, and sell products or services, you must now create some products and assign them to categories. You can create new products in the Products menu. Services can be created under Booking system.

The most important data you need to enter is a product number, product name, list price, and selecting a tax class. Set the status for *Visible* to *Yes*. If required, fill in additional fields.

Save your entries by clicking **Save**.

Assign the products to categories. To do this, click the **Categories** tab and select the correct categories.

For a complete description on how to best implement and use all the functions for products, see *Products*, *on page 67*.

The booking system and services can be created using the assistant in the **Booking system** menu item. You can find all relevant information under *Booking system*, on *on page 107*..

7. Check important system settings

All system parameters have a default setting and can be used immediately. Check the most important ones at this stage to optimise the settings. To do this, click **Settings** in the menu bar.

We recommend checking the following settings at this stage:

- Languages, currencies, countries; see *Country settings*, *on page 55*
- Delivery and payment methods; see *Delivery and payment*, *on page 43*
- E-mail settings for various notices and confirmation messages; see *E-mail settings*, *on page 58*

This completes the basic settings needed to operate your shop. An overview of all settings is available under *Settings*, on *on page 37*.

8. Testing

Before publishing the Internet address of your web site, you should test it as a visitor. Doing this lets you check whether your settings and changes (for your logo, design, products, and so on) have been correctly applied and are displayed as planned.

It is also important to check whether e-mails such as registration confirmations or order confirmations are being sent. Sign in as a customer to provide a valid e-mail address for messages to be sent to.

> Note: If e-mails are not being sent properly although you entered all the addresses correctly, have your provider check the system settings.

If the tests run to your satisfaction, delete all the test data (products, customers, etc.) and make the Internet address of your Web site available to your clientèle.

We wish you the best of success!

3. Basic principles

This chapter explains the basic structures, functions and procedures that are used throughout the entire application. This knowledge will be required to use the application effectively.

General page layout

All pages of the administration are based on the following structure:

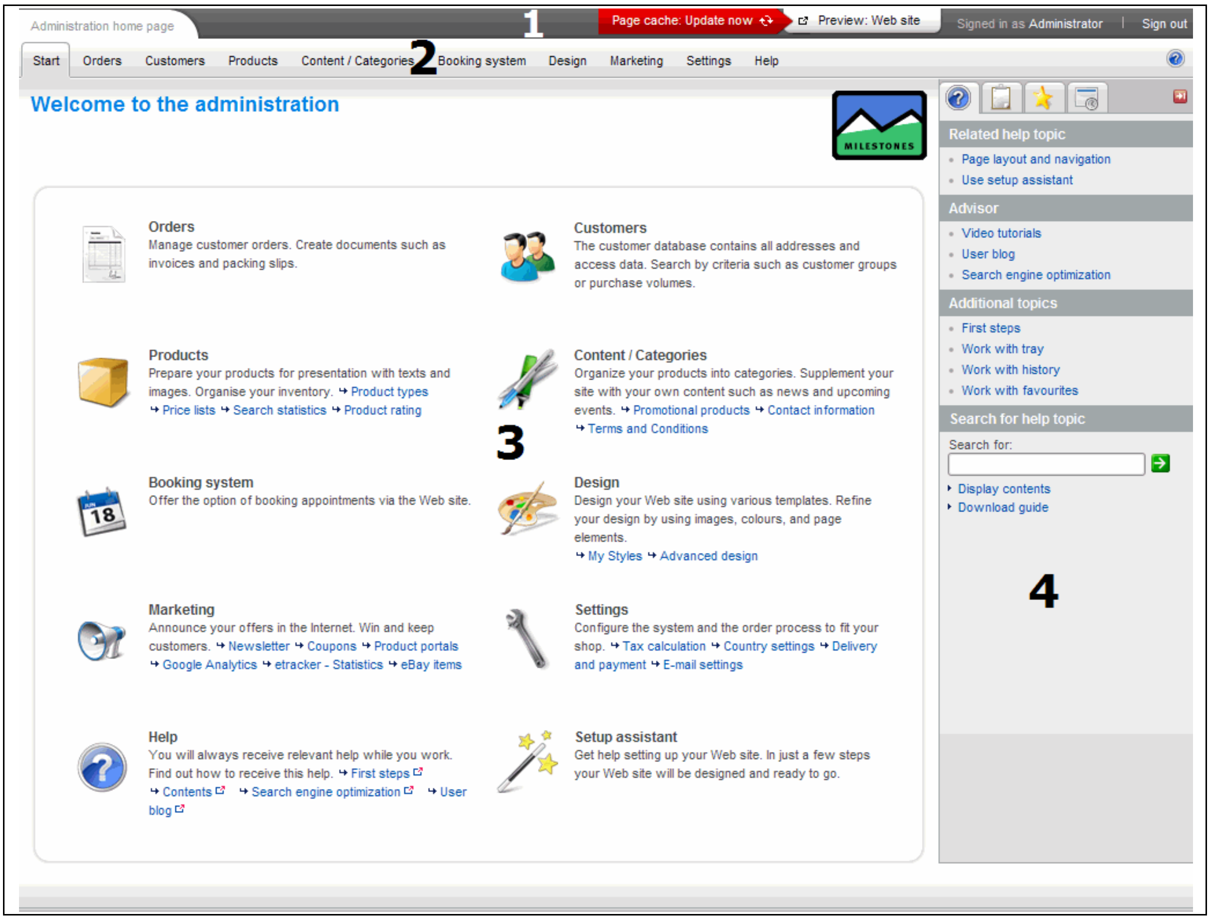

Figure 1: Structure of Administration pages

The areas are:

- Administration navigation (1); see *Administration Navigation, below*
- Menu bar(2)
- Working area (3); see *Working area, on page 18*
- Sidebar (4); see *Sidebar, on page 18*

Administration Navigation

The Administration Navigation menu is available on every page. The following links are available:

Web site link

Using the **Preview:** link **Website** show your current website from the point of view of a customer in the browser. See *Web site views*, on *on page 20*. If your website is closed for visitors, a symbol for this is also shown in addition to the link.

Page cache link

In some cases a link is shown in front of the link to the site **Page cache: update now** in a red arrow. This link displays the status of the page cache. Use this link to activate the page cache with the current settings or open the settings for the page cache. For more information on the page cache, see *Page cache*, *on page 37*.

Administrator link

Click your administrator name to open the page containing the user settings for the administrator. See *Administrator data*, *on page 35*.

Sign out link

Click **Sign Out** to leave the Administration area. Signing out ensures that your connection to the system is closed correctly and securely, and that no unauthorised user can gain access to the Administration area of your site. After you sign out, the sign-in page will appear again.

Working area

The working area may contain forms, tables, or other functional controls, depending on its current purpose. Each area is organised into tabs. Every tab has a title which is displayed in the form of a link. See *Figure 2*, *on page 20*. You can click this link to activate the tab, if more than one tab is visible at a time.

On the tabs you can enter and edit information, check settings, display search results, and so on.

Sidebar

The sidebar consists of the following sections described below:

- Help; see *Help*, *on page 20*
- Tray; see *Tray*, *below*
- Favourites; see *Favourites*, *on page 19*
- History; see *History*, *on page 19*

By default, the first time a particular page is called up, the Help section is displayed. This happens irrespective of which section of the sidebar was active before. If the page that has been called up has been viewed before, then the sidebar content does not change. If you are happy using the application, and do not need the help to be shown for new pages, you can edit this default setting; see *Administrator data*, *on page 35*.

Tray

The tray is an area for temporarily storing objects or object groups. These objects may be products, customers, or even delivery methods. You can add an object to the tray at one place in the application and use it at another place.

An example is sending newsletters containing product information. You select the products from the product list and add these to the tray. When you create the newsletter, you can take the products from the tray and insert them into the newsletter.

The objects are saved in groups according to type. The number of elements which are contained in the group is displayed in round brackets.

> **Note:** There is one group for each object type (for example, customers or categories) and one group for each product type.

The following methods are available to add objects to the tray:

- add a single object from its detail view.

  When you are in the detail view of an object which can be added to the tray, its name will appear as the second-to-last entry in the tray.
  This object has not yet been added to the tray. Do do this, click the entry with the object name. This adds the object to the correct group in the tray. The object link will be displayed as long as you are in the detail view for the object. If the entry is not a link, the object has already been saved in the tray.

- add a number of objects from a table using batch processing commands

  If you want to add several objects to the tray at the same time, you must switch to the table view for the objects in question. In addition, the *Add to tray* batch processing command must be available for this table. Instructions for executing batch processing commands can be found in *Batch processing in tables*, *on page 21*.

On certain pages it is possible to add objects from the tray. There is a button for this **Add products from tray**. Only objects applicable to the current task will be added from the tray.

To remove an entry from the tray, click the ✖ icon behind the relevant entry.

To remove all entries from the tray, click **Empty tray**. When you sign out, the tray will also be emptied.

History

The *History* list contains links to the most-recently visited pages that you have called up in the Administration area.

After signing off, the history is emptied.

To copy a link from the history into your favourites, click the icon. For more information, see *Favourites below*.

Favourites

This area contains links to your favourite pages in the administration area. This allows you to open these pages directly.

The following options are available for saving pages to your favourites:

- Pages can be added from the *History* area. See *History, above*.
- The name of the current page is shown as the second-to-last entry under *Favourites* in bold. If the page has not yet been entered into the favourites list, the entry takes the form of a link. You can click this link to add the current page to your favourites.

Favourites continue to be stored after signing out. The number of favourites you can have is unlimited.

Sections

Sections are subareas on tabs and serve to group data. Sections are used if the amount of relevant information is too large for one tab, but these belong together.

The individual sections can be selected by clicking the section title; see *Figure 2*.

Figure 2: tabs and sections

The arrow shows the selected section.

Help

The application includes a multi-level Help system.

The most important information are available in the form of notes right on the web page.

The current page may contain links to related topics on the bottom part of the page and to functions or settings which are related to the current page.

Active button "Save"

In the application, **Save** is an active button. This means that the button can only be used when a value has been changed on the current page and saving is necessary.

As well as this, a *appears in the title bar of the browser so that you can quickly recognise from the Windows taskbar that the content of the browser has not been saved.

Web site views

If you create or edit information which is visible on the Web site, you should also make sure that the information has been transmitted and is displayed correctly.

You can open the latest version of the pages of your Web site in a new window by clicking the link in the Administration Navigation bar; see *Administration Navigation*, *on page 17*. The page is displayed using the active style.

If you edit a different style, the Web site is displayed using the design stipulated by that style. See also *Own styles*, on *on page 123*.

Tables

A table is a list of objects. Information can be added to a table, modified, or deleted. To increase the clarity to fit your requirements, you can sort the records according to various methods. In some tables, you can define the contents using a search filter.

The table functions are explained individually in the following section.

- *Adding records*,
- *Editing records*,
- *Deleting records,*

- *Selecting in tables,*
- *Batch processing in tables,*
- *Sorting using sorting keys*,

Adding records

The following methods are available for creating new records:

- Manual record entry
- Add information from the tray
- **New** entry in submenu

Editing records

You can modify entries in the following ways:

- manual modification in the table
- open the detail view and modify the entries in the detail view

  Click the link to open the detail view. Modify the information in the detail view. Save your entries by clicking **Save**.

- modifying entries in groups by batch processing

  If multiple entries are to be processed in one action, use the respective batch processing command. See also *Batch processing in tables*, *below*.

Deleting records

Entries can be deleted in the following ways:

- Button **Delete**

  In some tables there is a button marked **Delete** below the table. Select the relevant entries and click **Delete**.

- The batch processing command *Delete*

  In some tables *Delete* can be selected from the batch processing commands. Select the relevant entries and start the *Delete* process.

For more on selecting, see *Selecting in tables*, *below*.

For more on batch processing, see *Batch processing in tables*, *below*.

Selecting in tables

If a table contains records which can be selected, the first column is the selection column.

To select all records on the page, click the check box in the column header.

> Note: The *Select all* function works on all the records displayed on the current page. To select any other records, you first have to open the correct page and execute the command for this page.

Batch processing in tables

A batch processing command is a command which is executed for all selected records in a table. The batch processing commands for tables are located in a drop-down menu below the corresponding table.

Perform these steps to use a batch processing command:

1. Select the records to be processed.
2. Select the command in the drop-down menu.
3. Start the command by clicking **Execute**.

Sorting using sorting keys

The sorting key is a number much like a row number, which is used to determine the order of records in a table. Every record is assigned a position in the table according to the sorting key. If the table supports sorting records using sorting keys, the column *Sort order* is displayed. In this column, the current sort key for every record is displayed in an entry field.

Changing the value of the sort key lets you sort the table records any way you like. Save your entries by clicking **Save**.

In order to be able to more effectively sort new entries, after saving a new sort order, the key fields are again displayed in increments of 10.

Note: This sorting command effects both the Web site display and the administration area.

Search

You can switch between quick search and advanced search.

The quick search is a full text search and offers one entry field. The entered search term is applied to all fields of the objects that can contain text.

The advanced search contains additional fields. The entry fields adjust to the type of objects to be filtered. For products there are product specific fields, for customers there are customer specific fields, and so on.

You can use the placeholder * in the text fields to complete the search text. Capitalisation is not considered. If you only enter "*” or leave the field blank, all objects of that type will be shown.

The search fields are connected using logical AND. In other words, a record must meet all the criteria defined by the entries in the search fields and not just one of them.

Language-dependency

The application supports various languages, both in the Web site and also on the administration page.

The administration language is set in the administrator settings; see *Administrator data, on page 35*.

You can set up language selection for your visitors on the Web page so that every visitor can select his preferred language. Activate these languages in the Country settings; see *Country settings, on page 55*.

Note that you have to enter and maintain your specific content for the various languages yourself. This is information such as product descriptions or names, language-specific files, and other attachments.

At all places where language-dependent content must be maintained, the corresponding entry fields for different languages are displayed. The drop-down menu contains the languages you selected in *Languages, on page 55*.

Always enter date and time information in the administration language. The display on the web site will always be in the selected language automatically.

Default settings

Your customers must select between various values in the shop in various places. This is, for example, the selection of the payment or delivery method or the selection of product variations. You define a standard value for each selection. This value is shown to the customer upon opening the page as selected and is valid as long as the customer does not select any other.

The setting of the standard value is termed the default. In all tables in which you can set a default value, there is a *Default* column. The column contains an option field for each entry.

Click the option button of the value that is to be the default setting. Save your entries by clicking **Save**.

On the detail page of the corresponding objects, you can set the default as well.

Select the values your customers use the most.

Visibility

The visibility setting defines whether an object is displayed in the Web site. If you activate *Visible*, the customer can see and order these elements in the shop. If you deactivate *Visible*, the element can only be seen by you in the preview.

You can manage the visibility using option buttons in the detail views or using the check boxes in the corresponding tables.

Note: Newly created elements such as products, categories, and so on, are set by default to *Not Visible* so that you can first collect all the necessary data before the element appears in the Web site.

Attribute types

Attributes are used to describe properties of objects. For example, customers have attributes such as salutation, username or e-mail address. For products these are product number or description, for example.

Attributes can be divided into different attribute types. You can set the usage and allowed values of an attribute over the attribute types.

When creating attributes for products or customers, you need to define the attribute type. This means that you define whether this attribute should be displayed and processed as, for example, a character string (text), a number, or a date in the system. The individual attribute types have the following meanings:

Table 1: Overview of the attribute types for entry fields

Type	Description	Usage	Example
Text	Character string, word, sentence	Entry fields for names, addresses, text and so on. You can use any character. There are no length restrictions.	Text field
Language-dependent text	Language-dependent text	Can be used as *Text*; one value can be entered for each active language	red Red
Text with value selection	Text for building a set of possible values	For more information, see *Using text with value selection*, *on page 24*.	red yellow green

Type	Description	Usage	Example
Language-dependent text with value selection	Language-dependent text for building a set of possible values	Can be used as *Text with value selection*; one value can be entered for each active language See *Language-dependency, on page 22* and *Using text with value selection, below*.	Rot / Red Gelb / Yellow Grün /Green
Options	Selection	See *Using options, on page 26*.	CD DVD
Language-dependent options	Selection	Can be used as options; one value can be entered for each active language	Optical mouse Optical mouse English keyboard English keyboard
Customer options	Selection	This allows you to offer options for services that the customer can select for the booking. See also *Service details - Customer options, on page 108*.	Table reservation with: Flower arrangement, Christmas decorations
Integer	Integer		255
Decimal number	Floating-point decimal numbers		15.23
Yes/No	Decision	Option buttons. At this point, the user makes a *Yes* or *No* decision.	Option button *Visible*
Money	A fixed-point number with a specific number of decimal places for saving money amounts.	Entry field for prices	€21.95
Date	Date fields for days from 01.01.0001 up to 31.12.9999.		*Time*
12.06.2010	Time field for the range 00:00:00 to 23:23:59		11:11
Date and time	Combination of date and time	Entry fields for exact times. The entry format is defined by the current country setting. For Germany the format is *DD.MM.YYYY hh:mm:ss*	6/12/2010 11:11
File	File name	You can use this field to assign a file to a product, for example.	Productinfo.pdf
Language-dependent file	File name	Can be used as *File*; one file can be assigned for each active language	Productinfo_de.pdf Productinfo_en.pdf

Using text with value selection

The *Text with value selection* and the *Language-dependent text with value selection* attribute types form the basis for creating drop-down menus or product variations. For these attributes, you define various values for the user to select from.

In the details for these attributes, next to the **General** tab there is an additional **Value selection** tab. Here you can define a value pool which will be used for this attribute. This allows you to make sure that only the values you suggest can be applied to an attribute.

The following example demonstrates this:

You would like your visitors to enter how they heard about your site on the registration form. You want to set a fixed number of answers which the customer can select from.

Create a *ContactInfo* customer attribute of the type *Language-dependent text with value selection*. For more on customer attributes, see *Attributes*, *on page 88*. Create the preset values in the attribute details on the **Value selection** tab as shown in *Figure 3*.

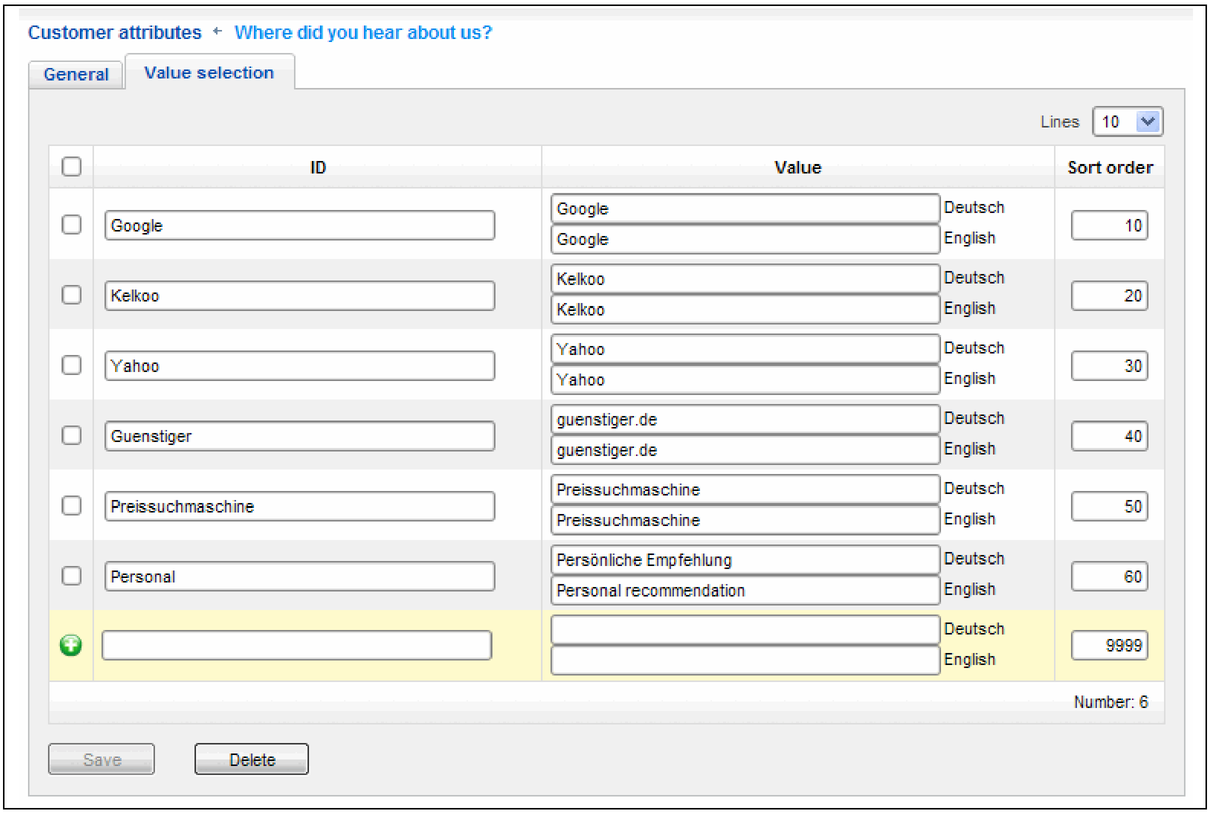

Figure 3: Value pool for the attribute type *Language-dependent text with value selection*

Save your entries by clicking **Save**.

The customer can then use the following drop-down menu in the registration form.

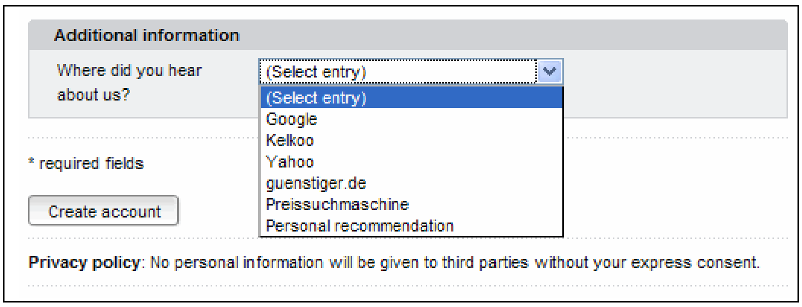

Figure 4: using an attribute with value selection

Using options

These attribute types provide the user with a value pool from which to select multiple values. Each value can be selected by clicking the check box next to it. This technique is useful for creating different product configurations.

Just as in *Text with value selection*, you define a value pool which can be used for this attribute. This allows you to make sure that only the values you suggest can be applied to an attribute.

The following example demonstrates this:

A basic product is to be offered with various additional components. In a *Configuration* attribute you provide possible configuration characteristics; see *Figure 5*.

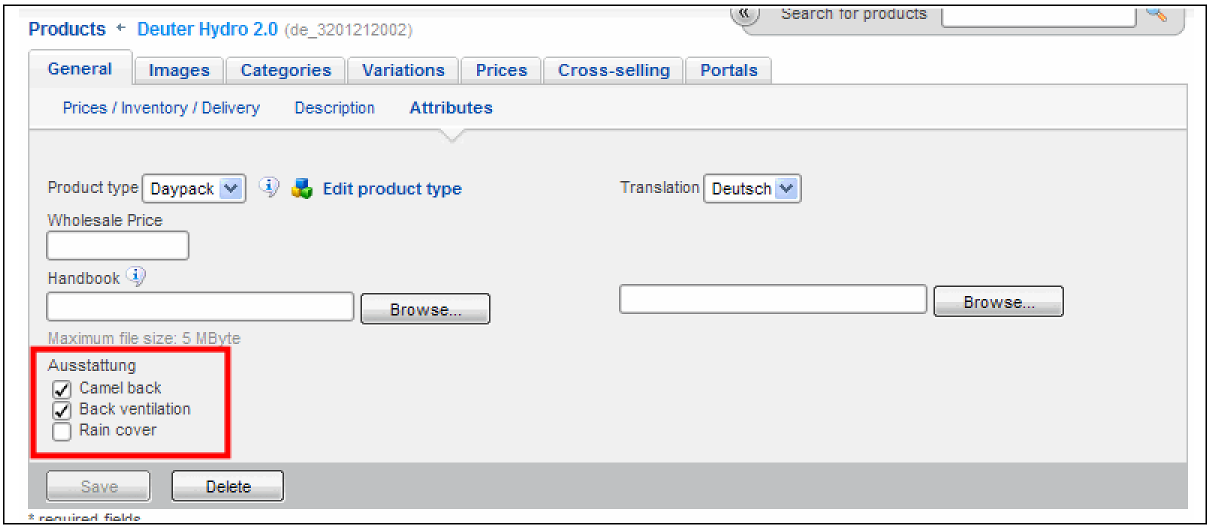

Figure 5: attribute type options

When creating a product of this type the configuration of this product is displayed in the check boxes.

Working with text fields

Text fields are entry fields where longer texts can be entered. They are used to contain, for example, product descriptions or the text of a newsletter. You can format these texts to make the layout more attractive. This can be done in the following ways:

- Usage of the integrated WYSIWYG editor, see *WYSIWYG Editor, below*
- Usage of HTML formatting instructions directly in the text

The **Edit text** button above a text field identifies it as a field that can be formatted.

When working in the page preview, there is also the option of using the inline editing mode. This allows you to edit text directly in the page preview. For formatting purposes, use the WYSIWYG formatting tools in the multi-function toolbar. See also *Preview*, *on page 93* and *Multifunction bar and content*, *on page 94*. You cannot use HTML code directly during inline editing. To enter HTML code at this position, click the **Edit HTML** icon in the multifunction bar.

WYSIWYG Editor

The program offers a comfortable solution for designing text fields - a WYSIWYG editor. WYSIWYG (What You See Is What You Get) means that the text is shown during editing exactly as it will be displayed later.

This has the advantage for you that you can simply and professionally design texts without knowing formatting commands. You can insert images, links and tables easily.

Open the editor by clicking the **Edit text** button for a text field. This opens the editor in a new window containing the existing text from the field

To close the editor and enter the formatted text in the first text field, click **Apply**. This saves the text in the field.

Read about the colour selection in Colour selector, on page 29,

Under *Insert,* you can find all the functions that can be used to insert and edit tables, links, files, images and other multimedia elements.

Insert and edit images/videos

You can add images and videos using the file manager. For more about this, see *File management*, *on page 30*.

This is how to add an image:

1. Click the icon. for image *insert/edit*.
2. Select an image from the file manager.
3. Click **Apply** in the file manager to add the image into the WYSIWYG Editor.

Edit the image settings as follows:

1. Click the image.
2. Click the icon. *Insert/edit image.*
3. Modify the properties.
4. Click **Apply** to save the changes for the image.

To add videos of Flash files, do the same thing.

Note the following:

- The address of the image file is entered in the *Image URL* field. If you want to display an image using an absolute URL, enter the address in the format *http://...*. If the image is supposed to be shown on a page that is loaded using *https://*, the image URL must also contain *https://*. Otherwise, a warning is shown in the browser about unsafe content. In the shop, all pages after the shopping basket are *https* pages.
- Include a description and a title. The description is important for search engines.

Insert and edit multimedia elements

Multimedia elements are active elements which you can include in your web site in order to make it more attractive or in order to include external content. This includes Flash files, RSS feeds and “Gadgets”.

This is how to add a multimedia element:

1. Click on the button of the relevant type.
2. Select the element from the list.
3. Enter the required parameters on the detail page.
4. Click on **Update** to display a preview.
5. Click **Add** to add the element into the text field.

Flash page content

Flash page content contains animated images/graphics. The user must have installed a Flash player for his browser in order to be able to view the Flash files. Flash files are used, for example, for banner advertising or to realise complex content in an animated format.

Eye Catcher elements are Flash templates for smaller areas that can be integrated into the content of the page and that attract the visitor's eye to a particular point.

The *Intro* elements are Flash templates that are larger than the Eye Catchers. They dominate the page. Templates that can be inserted as an introduction to your home page can also be found here. See also *Intro*, *on page 99*.

Gadgets

Gadgets are various functions that can be integrated into your Web pages. These allow you to provide your Web site's visitors with additional information, services or entertainment. Typical gadgets include, for example, railway timetables, traffic information or Google Maps.

RSS page content

RSS page content (RSS feeds) are lists of short messages that can be integrated into your Web site. They are comparable to a news ticker. In an RSS feed, the news is summarized briefly in headlines. A link allows the visitor to jump to the entire message. RSS feeds are available from many different providers on many different topics.

The user can load new Feeds using the update button on the web site.

Insert link / Remove link

This is how to add a link:

1. Select the text for the link.
2. Click on the button to add a link.
3. Enter an internet address or select a page.
4. Select the corresponding checkbox if the linked page should open in its own window.
5. Click **Apply** to add the element into the text field.

The list also contains any anchors you have added to the text in the lower section.

To remove an assigned link, move the cursor to the link and click the icon. The link is deleted and the text loses the link function.

Insert anchor

Using anchors, you can set target marks in the text which can be jumped to using special links.

Click the icon to place an anchor. Enter the name of the anchor in the *Anchor name* field and click **Insert**.

If you want to insert a link to an anchor, follow the instructions for *Insert link / Remove link*, *above*. Select the corresponding anchor in the page selection list.

Uploading images

Images are uploaded through the *Open file* dialogue. In addition, an **Upload file** button or symbol is available in the corresponding places.

Use the following process to upload images:

- Using the upload file dialogue

  Here you can select in the open file window the corresponding files in order to upload these directly. In some places in the application, a size alteration can be made with the image during upload. A check box is shown for this, if it is possible.

- Using the file manager

  The file management is opened. You select the desired file from the file list. For more about this, see *File management*, *on page 30*. You can open the kinds of files that are allowed for the current operation.

> Note: You can use the *Open file* dialogue to upload external images. In the field for the file name, enter the external URL of the file (http://...). If the image is supposed to be shown on a page that is loaded using *https://*, the image URL must also contain *https://*. Otherwise, a warning is shown in the browser about unsafe content. In the shop, all pages after the shopping basket are *https* pages.

For background images, there are a number of special points that must be noted. Read *Notes on background images*, *on page 115*.

Colour selector

The colour selector is a tool used to help select colours. The colour selector is used in all instances where colours can be defined for text, background colour, etc.

All elements for which a colour can be set are identified by a corresponding icon that shows the current colour. Click this icon to open the colour selector in a new window.

On the right side, the current colour is shown with its parameters, as well as a scheme of matching colours and your user-defined colours. The current colour is highlighted by a square on the **Colour selector** tab.

Colour selector

When configuring a colour, the following options are available:

- Direct entry

  When entering a colour directly, you enter the colour code in the *#* field in the form of an #RRGGBB code (RR = red, GG = green, BB = blue), starting with a hash sign (#). If you do not enter the hash sign, it will be automatically added to form a valid colour code during saving. You can also enter values for brightness and saturation. The coding of colours in HTML will not be discussed here further. Please consult the corresponding technical literature.

- Selection via the colour palette

  Here you can select the colour using the mouse. Use the vertical slider to select the colour shown in the colour field. You must select the corresponding colour hue in the colour field. The currently selected colour is displayed in the large box on the right.

To apply the current colour, click **Apply**.

Colour schemes / matching colours

The **Colour schemes** tab displays a number of colour schemes. These are complementary colours that are a best match for the current colour according to colour theory. The schemes are calculated on the basis of the basic principles of design technology. You can select a type. The corresponding colours in this scheme are always displayed to the right of the box with the current colour. If you want to set one of the other colours in the scheme as the current colour, click the corresponding box. The scheme that you selected most recently is always active.

User-defined colours

You can save the colours that you want to reuse in the fields for user-defined colours. To save a colour, drag the current colour from the box and drop it into one of the user-defined colour fields. Some of the user-defined colours will initially be preset according to your selected design template.

To set a user-defined colour as the current colour, simply click the corresponding colour box. This causes the colour to be displayed in the box for the current colour where it can be applied.

File management

You can use the file management function to upload and manage various types of file. You can access these file from the WYSIWYG Editor. Logos and background images can also be loaded from the file manager.

File management is separated into two main folders *Own files* and *Image database.*

Under the main folder *Own files* you can create a folder structure into which you can sort your own files. You can import the desired file into the text from this structure.

This contains a selection of images that you can copy directly to your text or your own site structure.

The left side of the file management control displays the folder structure. The files are listed in the right side.

If you select a folder, the corresponding commands that are available for this folder are displayed in the command bar. The following functions can be performed:

- Create new folder
- Rename folder
- Delete folders

To upload files, click the **Upload files** button. See also *Uploading images*, *on page 28*. The following functions are also available for files:

- Delete
- Delete selected files
- Download
- Rename files
- Copy files

To copy files, proceed as follows:

1. Select the target folder.
2. Select a folder in the image database.
3. Highlight the relevant images.
4. Click **Copy files**.

Import and export

Use the import and export functions to share information with other systems. This can be used if you have prepared your information using another system or program and you want to use this in the Web site; see

Import file, *below*. Conversely, you may want to use the information on the Web site in another system; see *Export*, *below*.

CSV files are used for import and export. A CSV file is a simple text file containing a list of individual values separated by a specific delimiter. Each object takes up one line in the file. For more on CSV files, see also *Editing CSV files with Microsoft Excel*, *on page 32*. Use of an export file as a template for the import file ensures that you correctly spell field names and field and column names.

The details for import and export for specific object types is explained in the respective chapters.

> Note: Before importing a file with a large number of records, we recommend that you test the import process with a file of just one or a few records.

Export

The export can be done in the following ways:

- Export selected objects using batch processes.

  In this case, the *Export* command can be used on tables for specific objects such as products or customers. This allows you to export the selected objects in the tables. For more on batch processing, see *Batch processing in tables*, *on page 21*.

- Export all objects of a specific type using the **Import and Export** menu item.

The various fields have the following meaning for the export:

Table 2: parameters for exporting product data

Field name	Description
Object Type	
Formatting	Regional setting for the data format in the export file, for example, for currency or date information. The selection also determines the corresponding separator symbol.
Coding	Selection of the character set to be used. The *Default* is the default character set for the administration language. If you are using additional characters, set this to Unicode. Otherwise this character will be displayed as a question mark.
Delimiter	Delimiter used to divide data fields in the export file This setting overwrites the delimiter setting entered in *Formatting*.
Languages	Setting that defines which fields relevant for a language will be exported

Once you have entered all the settings, click **Export** to start the export process.

> Note: Some functions in the application will open in new browser windows. For this reason, your browser must allow pop-up windows to open. Otherwise, certain functions cannot be used.

Import file

Before importing, you first need to create a correctly formatted CSV file. It is especially important to use the correct field names in the header.

The field names in the header have two parts, the name and the ID. The name corresponds to the name of the fields in the product detail view. You can modify this name if necessary. The internal names (IDs) are enclosed in square brackets and **must never** be changed. You can also interchange columns, as long as each column keeps its own heading.

Note: Use the export file as an example in order to have a template for the headings.

The following rules are applied to the values in the import file:

- If a column in the import file is not available, the values in the database will not be changed.
- If a column of the import file is available and does not contain values for one or more records, the respective entries are deleted from the database.
- If a column in the import file exists and contains entries, the corresponding data is replaced in the database by the data from the file.

The various fields have the following meaning for the import:

Table 3: Parameters for importing product data

Field name	Description	Field type	Example
Object Type		Drop-down menu	
Formatting	Defines how numbers, currency, and date formats are interpreted during the import The selection also determines the corresponding separator symbol.	Drop-down menu	
Delimiter	Setting for the delimiter used to divide data fields in the import file This setting overwrites the delimiter setting entered in *Formatting*.	Drop-down menu	
Languages	Irrelevant for the import.	Drop-down menu	
CSV import file	Enter the name of the import file in this field. Click **Browse** to search for the file. The size of the import file is limited. The current maximum value is displayed under the entry field.	Entry field, alphanumeric	C:\temp\import.csv

When all the parameters have been set correctly, start the import by clicking **Import**. If problems occur during import, you will receive a relevant message. In the case of large files, the total number of errors is limited to 100 error messages.

Editing CSV files with Microsoft Excel

CSV files can be edited with Microsoft Excel, for example. The automatic cell formatting in Microsoft Excel can cause some data to be incorrectly interpreted and displayed. This occurs in the following examples, among other cases:

- Long numbers may be displayed as exponentials (e.g. telephone numbers, where 123456789123654 becomes 1.234567 E+14).
- Dates and times may be displayed in numerical format (e.g. 02.05.2008 becomes 39570).
- Leading zeroes in numbers may be deleted (e.g. in postal codes, 07743 may become 7743).

In such cases, you must check the corresponding cells or columns and correct the formatting so that the data matches the requirements of the export file. Set for example for formatting for the specified cells to *Text*. Alternatively, use a different program to edit your import data.

Setup assistant

The Setup assistant will help you set up your Web site in just a few steps. You can set the design, configure some basic settings and enter the most important shop information here, without spending a long time getting to know the software.

All settings that you make here can be changed later at any time.

The setup assistant starts after every login automatically until you have gone through it completely once. You can start it automatically by clicking **Settings** ›› **Setup assistant**.

Any values already configured for various fields are entered as default settings.

Perform the following steps in the assistant:

1. Topic and design

Various designs are available for you to select. The designs are sorted according to sector and topic.

Select one of the templates from a topic that matches your situation. For more on selecting a template, see *Templates*, *on page 124*.

2. Pages and content

The selected design has a basic structure of pages, which contains basic content. The suggested basic structure of the corresponding pages is displayed on the left. If the check box is highlighted, then the associated page has already been added to your current Web site.

You will see the current structure of your own Web site and its pages on the right. Any pages that were already part of the Web site are retained.

For basic information on editing the structure and the individual pages, see *Content*, *on page 93*.

3. Contact data and presentation

Here you can enter the contact information for your Web site. The information entered is used for the Web site address and also for the initial entries in the Contact information.

The specified e-mail address is entered into the e-mail settings. The other information is used to generate an e-mail signature. In addition, the e-mail address is used for some e-mail events as a BCC address so that you receive a message automatically.

In addition you must configure the languages for your Web site. The pages are then displayed in these languages. For more on configuring languages, see *Languages*, *on page 55*.

In addition, you can upload a logo for your Web site. See also *Uploading images*, *on page 28*.

Click **Next** or **Back** to open the next or the previous page.

4. Settings for your shop

Here you determine the tax model according to which prices are displayed and calculated in the shop and, and the tax model used when entering prices in the administration area. For more on the tax model, see also *Tax model*, *on page 43*.

Your shop statistics will be collected and reported by etracker. If you have not yet configured etracker, an etracker account can be set up here automatically. To do this, select the relevant check box and enter a password. For more on etracker statistics, see *etracker statistics*, *on page 138*.

5. Finish

The information you entered is displayed on this page.

Once this has been done, the home page for your Web site is displayed in a new window using the design you have selected. On the administration page, you will see a page with suggestions for the next steps.

Short URL

Short URLs are short, meaningful internet addresses for a website. They are handier and easier to use than long cryptic URLs that are generated by the system. Here are URLs for two of the same pages as an example:

Long URL

- *http://www.shopdomain.de/epages/shopname.sf/de_DE/?ObjectPath=/Shops/shopname/Products/lt_0401107001*

Short URL

- *http://www.shopdomain.de/Leatherman*

The comparison shows the advantages of a short URL:

- The customer can read the short URL easier and faster.
- The customer can understand the URL on the page with the Google search results faster and easier.
- The customer can remember the URL.
- The customer can see the contents of the web site from the name.

You can assign short URLs for products, category, and informational pages. The prerequisite for assigning a short URL is your own domain.

You can create short URLs for all relevant pages with one comment from the start page of the administration. You can also manually change or create the short URL in the general details of the relevant page later.

Creating a short URL for all pages

Make sure that the provider of your web site has entered a domain name.

This is how to create a short URL for all pages:

1. Click this link to open the Administration home page.
2. Click **Generate short URLs**.
3. Read the ensuing message carefully and click **Generate short URLs**.

This is how to edit a short URL for individual pages:

1. Open the general details of a specific page, such as a product or a category.
2. Enter a descriptive name in the *Short URL* field, for example, the product name.
3. Save your entries by clicking Save.

If you would like to utilize the URL in other channels, click **Use link externally**. The URL is then shown in the normal form and in HTML. Copy and paste the URL into other media.

4. Administrator data

This is where you configure the personal settings that control the way you work in the administration area. These include, for example, data for accessing the administration area, and the e-mail address used to send you system notifications.

By and large this administrator data corresponds to the general sign-in data for users. See *Administrator details – Sign-in data, on page 41*.

The *Allow sign in* field is not shown, since you cannot lock the administrator account out of the Web site.

An additional setting is the option Always display Help for previously unseen pages. This allows you to manage the display of the Help pages. If you set this to Yes, Help topics will be shown for every page that is being visited the first time. See also *Sidebar*, *on page 18*.

Save your entries by clicking **Save**.

> *Caution:* If the *Automatic sign in via cookies* option is selected, everyone who uses your computer will have access to the administration area. In this case, make sure only authorised persons have access to your computer.

> Note: In some situations, more languages may be available for the Web site than for the Administration area.

Security query for deletion actions

For security reasons, you will be asked for additional confirmation with every delete command. The delete command will be performed after your confirmation. You can switch off deletion confirmation using the *Deletion confirmation* check box.

> *Caution:* If you clear the *Deletion Confirmation* check box, every deletion is executed immediately and without the need for confirmation. You will not be able to cancel the action later . It is recommended that only experienced users deactivate this.

5. Settings

General settings

Use the General settings to set the address of your Web site and enter the business hours. In addition, you can control customers' access to your Web site, the speed at which individual pages are rendered (displayed) and you can check the extent to which your licences are being used.

Status

Page: Settings ›› General settings ›› Status

The following tabs are available to edit the status of your web site:

Presentation

Here you can edit the name and slogan of your web site. Place these data using the page element *Name of the Web site with slogan*. They are usually shown in the *Header*. See *Design basics, on page 113*.

Here you can upload an image for your web site logo in optimal size. See also *Uploading images*, *on page 28*. Place the logo using the *Logo* page element. It is usually shown in the *Header* area.

A favicon is a small image that appears in the browser's address bar to the left of the Web site address (URL). The file should contain an image in the size 16x16 pixels or 32x32 pixels. You can do the following to create the Favicon:

- Directly from the logo: To do this, click the link. **Create own favicon from logo**.
- Create from another image: Upload the image directly, see *Uploading images*, *on page 28*. You can only use *.ico or *.cur images for this.

Status

You can close your web site. Instead of your web site, a message is shown. You can edit the content of the message. If you do not use your own text, a standard message is shown.

Advanced settings

You can add your own code to every page in the header HTML code. These can be your own style information, for example.

You can enter instructions, for example which remove the availability display for products. Enter the code in the text field and save your entries by clicking **Save**.

> *Caution:* Only use this function if you are an experienced user. Code errors can interfere with the function of the entire web site.

Page cache

Page: Settings ›› General settings ›› Page cache

This function controls the speed at your pages are displayed.

Dynamic content is data and information that is read from the database and inserted into the page just before the Web page is displayed. This ensures that the values are up-to-date. This includes data about prices, amounts, and so on.

Pages where the content changes rarely can be cached and displayed more quickly.

Your customers expect up-to-date pages with fast loading times. For this reason, it is a good idea to find the optimum setting between displaying current content and quicker availability of the page.

The page cache allows you to configure how often certain pages are updated. When deciding this, bear in mind how often you change and update the data on these pages.

For example, if you change the prices of your products weekly, it is good to update product and category pages as well as statistics every week after the price change. During the rest of the week, these pages can be loaded and displayed from the cache.

The same applies for stock data. When inventory levels of products are evaluated for display in the shop, the page cache must be set so that when the stock level changes during the order process, the corresponding pages are updated. For more about this, see *Inventory*, *on page 61*.

The status of the page cache is displayed in the Administrator menu; see *Administration Navigation*, *on page 17*.

Use the check box *Activate page cache...* to switch the page cache function on or off.

Once you have switched the page cache on, select your preferred update intervals for the pages listed on the screen. Save your entries by clicking **Save**.

If you have made extensive changes to data and information, you can update all the pages with one click. To do this, click **Update immediately**.

> Note: If you make changes while in the administration area and these changes are not immediately visible on the Web site, check the setting for the period of validity. If necessary, click *Update immediately*.

Remember the following:

- The page cache only applies to users who are not signed in.
- Customers will not see the changes until after the administrator has started the update or it has been performed automatically.

We recommend that while setting up the Web site you disable the page cache option in order to apply frequent changes immediately. When your shop goes into *Live* operation, click the check box and set the longest possible periods of validity.

Utilisation

Page: Settings ›› General settings ›› Utilisation

Your Web site supports a range of functionality with defined limits. The **Utilisation** tab shows you which functions are available in which scope and to what extent the maximum values are being used.

If you have reached the limit or want to use new functions, contact your provider.

Address

Page: Settings ›› General settings ›› Address

This data is used when the address information for the Web site is made public. For example, it is the sender address on invoices and packing slips. This information is also used when address information needs to be submitted to third party systems, for example, when registering for product portals such as Pangora or Kelkoo.

The *Additional text* field allows you to enter additional information for your Web site, such as bank account details. This information is displayed on all order documents, below the shop address.

Business hours

Page: Settings ›› General settings ›› Business hours

On this page, you can manage your usual hours of business. These are the times or hours during which you usually offer your services or during which your customers can book. The times on this page are the centrally maintained default times. These apply for example, to the booking system as the default and can be overwritten for individual bookings.

You can configure the same hours for all weeks, or set different hours for odd weeks and for even weeks.

When entering hours, you should remember:

- You can split a day into two, setting opening times for the morning and afternoon.
- For round-the-clock operation, enter the hours from 00 to 00 (not 00 to 24)
- The end time must always be greater than the start time. Therefore, to specify business hours from 22.00 until 04.00, enter 22 - 0 for the evening and 0 - 4 for the next day.

To display the business hours on the Web site, you must create a page using the *Business hours* type and set it as visible. See also *Business hours*, *on page 101*. In addition, you can place the page element *Business hours as box* on your pages. For more information, see *Page elements and navigation*, *on page 121*.

User administration

Users

Page: Settings ›› User management ›› Users

Users are visitors to your Web site who register and have a user name and password.

This allows you to make certain pages or even your whole Web site only accessible to registered users. You can also assign user-specific prices. Alternatively, restrict the use of forums and blogs to registered users.

User details – Sign-in data

Page: Settings ›› User management ›› Users ›› Sign-on data

A checkbox in the *Registration process completed* field means that the user has completed registration using the double opt-in process. Whether this special registration process must be performed is determined by you on the **Signing in** tab in the option *Use safe registration (double opt-in process)*. See also *Signing in*, *on page 40*.

If a user has forgotten his password, you can provide him with the possibility to set a new one. Click **Send e-mail**. This e-mail contains a link that the customer can use to enter a new password.

If you manually assign a new password, you must send the new password yourself.

> Note: When a new user is created manually in the MBO, the password is not generated automatically. You must enter a password so that the user can sign in to the Web site.

User details – Posts

Page: Settings ›› User management ›› Users ›› Posts

This displays a list of all the posts or messages that the user has written in all forums, blogs and guest books on your Web site.

User details - Newsletters

Page: Settings ›› User management ›› Users ›› Newsletters

In the table, all newsletter campaigns are listed. You can see immediately which are subscribed to by the current user.

If you subscribe or unsubscribe for this user here, he is informed about this via e-mail.

User groups

Page: Settings ›› User management ›› User groups

You need user groups if you want to allocate permission to your users to carry out certain commands. These types of permission are always allocated using user groups. For example, if you want to restrict a page to specific users, you must first link the corresponding page to the corresponding user group. You must also assign the corresponding users to this user group.

To create a new user group, the following options are available:

- Enter the new user group into the table. For more information, see *Adding records*, *on page 21*.
- When you create a customer group und **Customers ›› Customer groups,** a user group with the same name is created automatically. For more information about customer groups, see *Customer groups*, *on page 89*.

To display the list of assigned users, click the ID of the user group. To add users to the list, the following options are available.

- Proceed as described in *Adding records*, *on page 21*.
- Add a registered customer to a customer group.
  This customer will automatically be added as a user in the user group that has the same name as the customer group.

Registration

Page: Settings ›› User management ›› Registration

This section defines the content of the registration form. Your visitors must complete this form when registering. By the act of registering, your visitors become users.

The registration settings are described in *Registration*, *on page 60*.

Signing in

Page: Settings ›› User management ›› Sign in

This section allows you to define the options for accessing your Web site.

Select the option *Recognise returning users* to activate automatic sign in for registered users on your Web site. During the session, a cookie is generated for the user and saved. If the user leaves the web site without signing out the cookie remains saved. When the user next visits your Web site, the cookie is recognised automatically by the system and he is signed in. When the user signs out of the Web site, the cookie is erased. The user must sign in manually with the username and password.

> ***Caution:*** Automatic sign in only functions if users allow cookies to be stored on their computer. Otherwise, the sign in information cannot be stored and then read.

Using the *Require sign in* option you can make it compulsory for your users to sign in. This means that only visitors who have a user account are allowed to navigate on your Web site. New visitors can only access the Web site once you have created user profiles for them in the administration area.

Enter a relevant text in the *Text if signing in is required* field to inform non-registered visitors of the configuration and explain the steps required to register.

The *Double opt-in process* provides a secure registration for you and your customers. The customer receives an e-mail after registration. Only after the customer clicks on a special link will the registration process be completed. The customer has to confirm that he has performed the registration himself.

Once you start to use customer information for purposes not simply restricted to the ordering process, you must inform your customers of the reasons of your using their data and the customers must agree to this usage. You can enable the *Activate privacy policy...* option to require customers to agree to you saving their personal information. This step ensures that your customers have agreed to this usage before they register. If the option is active, an agreement is queried in the following places:

- during registration
- for unregistered customers, when they enter their address in the order process
- in the contact form

For information about the privacy policy, see *Privacy policy*, *on page 101*.

Administrators

Page: Settings ›› User management ›› Administrators

Administrators are all users that are registered in your web site and can work there.

> **Note:** The administrator created by your provider cannot be deleted from the administration.

Administrator details – Sign-in data

Page: Settings ›› User management ›› Administrators ›› Sign-in data

To find out about the security question for deletion, see *Security query for deletion actions*, *on page 35*.

Automatic sign-in via cookie allows access to the administration area without the sign-in process. Cookies must be enabled in the browser to do this. This field will only become active if you have activated signing in using cookies in `User management`, `Sign in`; see *Signing in*, *on page 40*.

> ***Caution:*** If the *Automatic sign in via cookies* option is selected, everyone who uses your computer will have access to the administration area. In this case, make sure only authorised persons have access to your computer.

> **Note:** For newly created administrators, the system assigns the default password *admin*. You must enter this as the old password when you change the password for the first time.

Administrator details – Posts

Page: Settings ›› User management ›› Administrators ›› Posts

This displays a list of all the posts or messages that the administrator has written in all forums, blogs and guest books on your Web site.

Tax calculation

Tax matrix

Page: Settings ›› Tax calculation ›› Tax matrix

Your provider will supply you with a table with the most widely used tax classes in the main tax areas. This is called the tax matrix.

The default tax class and the default tax area are marked with a * in the table.

The default setting of the tax matrix is *read only*. It is managed by your provider. If necessary, you can also edit the entries yourself. To do this, click **Customise**. After confirming this, you can edit the values in the matrix. The same applies for tax areas and tax classes.

> *Caution:* After doing this, you can no longer return to the default tax matrix. Once you have made the decision to customise the tax matrix for your shop, you will need to manage the tax settings yourself.

Tax areas

Page: Orders ›› Tax calculation ›› Tax areas

> Note: You cannot modify the tax areas until you click **Customise** on the **Tax matrix** page. See *Tax matrix, above*.

To set a tax area to default, click the option button in the corresponding row. The default setting of the tax area applies to the following places:

- During tax calculation for product prices in the MBO.

  If you save gross prices, net prices will be saved. And the tax level of the default tax area will be used.

- During selection of the tax area in the shopping basket

  If the customer is allowed to select his tax area in the shopping basket, available areas are displayed in a drop-down box. The default tax area is pre-selected in this field. See also *Shopping basket, on page 60*.

In the **Assignment to countries** section, you can assign a tax area to every country using a selection field. In the selection field, all areas are listed that you have created under **Tax areas**.

The tax area is the basis for the tax calculation for the specified customer. Therefore, each customer must be assigned a tax area. The assignment can occur manually or automatically. See also *Shopping basket, on page 60*. During automatic assignment, the country of the customer address is analysed and determines the tax area.

Tax classes

Page: Orders ›› Tax calculation ›› Tax classes

> Note: You cannot modify the tax classes until you click **Customise** on the **Tax matrix** page. See *Tax matrix, above*.

To set a tax class as default, click the option button in the corresponding row. The *preset* tax class will be set as the default when new products are added.

Tax model

Page: Orders ›› Tax calculation ›› Tax model

Here you configure whether prices are entered net or inclusive of tax how they are displayed in the shop.

Displaying and calculating prices in the shop

The way prices are displayed and calculated in the shopping basket depends on the tax model that is set.

According to the tax model that has been configured, a suitable price text is displayed alongside the price. See *Texts*, *on page 62*.

You can specify a different tax model for each customer. See *Customer details - General*, *on page 87*.

When selecting the tax model *Gross* you can set whether the VAT is shown in the shopping basket and in all e-mails and documents associated with the order. In some cases, merchants are not required to show tax. Note that these settings must also match the text that is displayed in addition to the product prices. For more information, see *Texts*, *on page 62*.

Entering prices

The option *Entry of prices in administration on basis of* stipulates whether the prices you enter are net or inclusive of VAT. This applies to product prices that are linked to a tax class.

The tax model does not differentiate between prices for which no tax class has been assigned. Such prices include, for example, coupon values.

Delivery and payment

Here you can manage and configure the payment and delivery methods you offer in your shop. The system provides relevant types which form the basis for the individual methods.

Delivery methods

Page: Settings ›› Delivery and payment ›› Delivery methods

The system provides the following internal types as the basis for the delivery methods:

Free delivery	Basis for delivery methods where no further costs are incurred.
Fixed price	Basis for delivery methods at a fixed price.
Exemption limit	Basis for delivery methods with price limits. Using this you can offer your customers *Free delivery* for goods above a certain total value. See *Delivery methods with an exemption limit, on page 44*.
Shopping basket total	Basis for delivery methods where the price depends upon the order value. In addition to product prices, coupons and discounts can be taken into account when calculating the order value, see *Delivery method* Shopping basket total, *on page 44*.

Weight of the products in the shopping basket	Basis for delivery methods where the price depends upon the weight of the order. Delivery costs are dependent upon the weight of the products in the shopping basket, see *Delivery method* Weight of the products in the shopping basket, *on page 45*.
Number of products in the shopping basket	Basis for delivery methods where the price depends upon the number of products ordered. Delivery costs are based upon the number of products in the basket; see *Delivery method* Number of products in the shopping basket, *on page 45*.

You can set the sequence of all delivery methods using the sorting key in the last column of the table. For more details, see *Sorting using sorting keys*, *on page 22*.

General properties for delivery methods

Page: Settings » Delivery and payment » Delivery methods » [delivery method] » General

The properties and parameters for the individual delivery methods have different underlying types. The general properties are the same for all delivery methods.

Using a delivery method can be limited by geographic region. Select the region from the field *Permit usage for following delivery addresses.* These regions must be defined beforehand. For more information, see *Regions*, *on page 57*.

Under *Note*, you can provide additional information about the delivery method. The language-dependent text is displayed to the customer during the order process, directly below the method and the packing slip is printed.

The *Visible* and *Default* fields are not active for the method marked as *Default*. If you want to edit the settings for this method, you must first set another method to default.

For all chargeable delivery methods there is an additional tab **Settings** that contains specific settings for the method. This tab is used to set the tax class, prices, maximum values and calculation basis. The current tax model is displayed for the prices; see *Tax model*, *on page 43*.

Delivery methods with an exemption limit

The base price will be used on the invoice for the customer, as long as the order value is smaller as the set limit.

In the field *Free above order value of* you can set the shopping basket value above which delivery is free for the customer.

You can also set how the limit is determined.

Delivery method *Shopping basket total*

Set from which partial prices the total price is calculated. Depending upon this total price, you can stagger delivery costs.

For each price area you set a base price and a calculation multiplier. The multiplier determines the variable part of the delivery price, the base price the constant part. Delivery costs are calculated according to the formula that is beneath the table.

This is how to create staggered prices:

1. Enter for the area from 0 to *unlimited* for every currency the multiplier and the base price for the first limit value (for example, 50 Euro).
2. Save your entries by clicking **Save**.
3. Enter the first limit into the field in the *Price of the shopping basket from* column, such as $50.
4. Enter the multiplier and base price. These values apply from the limit to *unlimited*.
5. Save your entries by clicking **Save**.

Delivery method *Weight of the products in the shopping basket*

Set in which weight unit the weight of the products of the shopping basket are calculated. Use this weight unit to define price scales for your delivery costs.

For each weight level you set a base price and a calculation multiplier. The multiplier determines the variable part of the delivery price, the base price the constant part. Delivery costs are calculated according to the formula that is beneath the table.

This is how to create staggered prices:

1. Enter into the area from 0 to *unlimited* a factor and a base price for every currency for the first limit value (500g for example).
2. Save all your entries with **Save**.
3. In the new entry field in the *Weight from* column, enter the first limit value (500g for example).
4. Enter the multiplier and base price. These values apply from the limit to *unlimited*.
5. Save your entries by clicking **Save**.

Negative values can be used for the base price as well. This allows you to use models such as: up to 20 Kg, delivery costs 5 Euro, over 20 Kg, every additional Kg costs 0.50 cents.

Delivery method *Number of products in the shopping basket*

For each amount, you set a base price and a calculation multiplier. The multiplier determines the variable part of the delivery price, the base price the constant part. Delivery costs are calculated according to the formula that is beneath the table.

This is how to create staggered prices.

1. Enter into the area from 0 to *unlimited* a factor and a base price for every currency for the first limit value (50 for example).
2. Save all your entries with **Save**.
3. In the new entry field in the *Quantity from* column, enter the first limit value (50 for example).
4. Enter the multiplier and base price. These values apply from the limit to *unlimited*.
5. Save your entries by clicking **Save**.

Shipping method DHL

DHL offers the possibility of online postage. This allows you to pay, create, and print postage stamps for your shipment simply and quickly. For more information on this, go to *www.dhl.de/onlinefrankierung*.

To be able to use these functions in your shop, you have to create a *Delivery using DHL* delivery method. For orders with this delivery method, create a DHL packing slip. You can generate and pay the shipping postage using this packing slip.

Under **Orders ›› Shipments ›› DHL shipment** you can find all orders that were assigned a DHL shipping number.

Under **Orders ›› Transactions ›› DHL online postage**, you can find all transactions that you have paid delivery postage online.

To create and pay for DHL postage stamps orders online proceed as follows:

1. Create a *Delivery using DHL* delivery method.
2. Open the details in the **Settings** tab.
3. Select the payment method that you would like to use to pay delivery costs with DHL.
4. Select the respective check boxes for this. The checkbox to confirm the Terms and conditions is a required field.
5. Enter the values to calculate delivery costs.
6. Save your entries by clicking **Save**.
7. Open the **Text** tab. Enter a text if desired that the customer sees in the order confirmation e-mail.
8. Set the delivery method on the **General** tab to Visible.
9. After an order has been performed with the delivery method *Delivery using DHL*, you are alerted via e-mail. (If you have the corresponding option activated in **Settings**.) Otherwise, you have to regularly search through orders for DHL orders.
10. Open the **Documents** tab in the details for DHL orders.
11. Create a DHL shipping label.
12. Open the details of the DHL shipping label and enter all necessary data.
13. Save all entries.
14. Click **Continue to DHL online postage**.
15. Pay the fee with the payment method which you have set in the settings. You receive a confirmation e-mail. During payment, a shopping basket is created for you by DHL that you can use to print the shipping postage.
16. You are returned to the MBO and the DHL shopping basket is shown.
17. From this shopping basket, you can print and save the shipping postage.
18. After a successful test print, begin the postage printing.
19. The shipping number is shown in the DHL shopping basket and in the list of DHL shipments.
20. After the shipment is received and registered with DHL, you and your customer are informed by DHL that shipment tracking is possible using the shipping number.

You can use batch actions to create postage stamps for several orders at once. To do so, select the DHL orders in the orders table and activate the respective batch processing command.

Then the DHL shipping labels will be created and shown one after the other. Enter the delivery data for every DHL shipping label. At the end, pay the total amount and print the delivery postage.

Payment methods

Page: Settings ›› Delivery and payment ›› Payment methods

Various payment methods are available that you can offer your customers. There are internal methods available as well as offerings of external vendors.

The types are provided by the system for the internal methods. All processes must be manually confirmed by you. The internal types are:

Free	No other costs are charged to the customer when this method is used.
Fixed price	You define the additional amount that the customer should pay when using this payment method.
Exemption limit	You define the additional amount that the customer should pay when using this payment method. In addition, you define a limit value (*Limit*) above which the customer must pay an order.

Direct debit	No other costs are charged to the customer when this method is used. This type makes sure that the customer's bank details are requested during the ordering process in the shop. The information entered is tested for completeness but not accuracy. No test is carried out for the existence of the account entered or the presence of sufficient funds.
Direct debit via fax	No other costs are charged to the customer when this method is used. The customer downloads a fax form during the order process that he uses to send his bank details.
Credit card	Use this method if you would like to offer your customers credit card payment and to edit the data manually.

For the external payment methods, the transactions will be performed on the platforms of the external providers. These are providers such as PayPal or Moneybookers. The customer will be sent to vendor’s system for the payment process where all necessary data will be gathered, checked, and processed. Afterwards, the customer is returned to the shop. The corresponding orders can be organized by transaction numbers. There is a transaction list for every provider that you can see under **Orders**.

Set the payment method as the default that is used most often by your customers.

Each payment method can be assigned to customer groups. This means that only those customers that belong to an assigned customer group can use this payment method. It is then only displayed for these customers. The assignment is managed on the **Customer groups** tab on the details of each payment method.

General properties for payment methods

Page: Settings ›› Delivery and payment ›› Payment methods ›› [payment method] ›› General

The general properties are mostly the same for all payment methods. If one of these settings for a method is not available, it is not displayed or displayed in grey.

Deferred payment available

This allows your customers to use your financing offering. To do this, deferred payment must be set up. See *Deferred payment*, *on page 54*.

Discounts

Create a discount for the payment methods that you want your customers to use more often. In contrast, you can pass the costs for a payment method on to customers by entering negative values.

Creating the order occurs

This setting is useful for payment methods of external vendors. This helps you manage whether the order is saved by the system before or after the payment process. If you save the order beforehand, you always have order data, even if the payment process has errors in the external system. You can then discuss the order with the customer and solve the problem.

Permit usage for the following billing addresses

This allows you to limit payment methods to specific regions. For more information, see *Regions*, *on page 57*.

Comment

This text is displayed to the customer during the order process, directly below the method and order documents are printed.

Save your entries by clicking **Save**.

Caution: A payment method must be visible in order for it to be available for selection in the shop.

The *Visible* and *Default* fields are not active for the method marked as *Default*. If you want to edit the settings for this method, you must first set another method to default.

For the payment methods with special settings, there is an additional **Settings** tab. This tab is used to set the values such as tax rate, prices, maximum values and calculation basis and other parameters. The current tax model is displayed for the prices; see *Tax model*, *on page 43*.

Payment method with credit card, manual

Page: Settings » Delivery and payment » Payment methods » [credit card, manual] » Settings

The table shows all credit cards with manual processing. Using the drop-down menus, you can set which additional information the customer has to enter for which credit card and whether the corresponding entry fields are required or optional.

Entry fields for *Card number*, *Card holder*, and *Expiry date* are displayed by default. This cannot be modified.

Use a page element to display credit cards in the shop that you accept. In the **Credit card logos** section, select the correct logos. Save your entries by clicking **Save**. For more information, see the section *Page elements and navigation*, in the *Page elements and navigation* chapter, *on page 121*.

The credit card data is deleted after you have set the status to *Paid* or *Rejected*. The only information that remains is a note that the order was paid by credit card. For data protection purposes, make sure that you set the order to *Paid* or *Rejected* as soon as possible.

Payment method with T-Pay

Page: Settings » Delivery and payment » Payment methods » T-Pay

To use this payment system, your customers must register and you must register as a merchant with T-Pay.

The following payment variations are configured for the shop system: *MicroMoney*, *Telephone bill from Deutsche Telekom*, *Direct debit*, *Credit card* and *Anonymous payment with credit card*.

Creating a payment method

1. Register with T-Pay.
   To do this, click the **Register with T-Pay** link.
2. Create your T-Pay account.
3. Use the data.
   During the process of registering with T-Com, you will be allocated a MerchantID, a ShopID and a *MerchantSecrets* code. Set the operational mode to *Test*.
4. Select the payment variations.
   This allows you to stipulate which payment variants you offer to your customers on the T-Com platform. The selected methods will be displayed to your customers on the T-Com payment page. They can select a method according to preference.
5. Select the credit card logos.
6. Save your entries by clicking **Save**.

7. Place the page element for the T-Pay logo on the Web site. For more information, see *Page elements and navigation*, *on page 121*

If all tests are successful, contact T-Pay support and request that your shop is activated. Once you have done this, switch the operational mode to *Live* and set the payment method to visible for your customers.

> ***Caution:*** Do not switch the *T-Pay* payment method to *Live* before receiving confirmation from T-Pay support. Doing this will result in errors in the transaction process for you and your customers.

T-Pay transactions

Page: Orders ›› Transactions ›› T-Pay

If you have set the *Authorisation* setting, you must initiate payment by T-Pay to your merchant account manually, after the customer has authorised the transaction. Select the relevant transactions in the table and click **Initiate payment**. Payment will occur after you have done this. The relevant transactions will be set to *Paid*.

PayPal standard

Page: Settings ›› Delivery and payment ›› Payment methods ›› PayPal Standard

Each PayPal customer has an online account which can be funded via credit card, direct debit, or bank transfer. Money can be instantly transferred to other PayPal customers using the recipient's e-mail address. You can organise credit card payments for non-PayPal customers. This is dependant upon the type of account that you created with PayPal.

You are shown whether the buyer has been verified by PayPal with the transaction data.

Creating a payment method

1. Create a PayPal account.
2. In the *E-mail* field you should enter the e-mail address that you use to sign in to PayPal.
3. Select an operational mode.
4. Save your entries by clicking **Save**.
5. Set the payment method to visible.
6. Place the page element for the PayPal logo on the Web site. For more information, see *Page elements and navigation*, *on page 121*.

PayPal Pro payment method (Payflow edition)

Page: Settings ›› Delivery and payment ›› Payment methods ›› PayPal Pro (Payflow edition)

With PayPal Pro (Payflow Edition), customers can pay via credit card. PayPal verifies the data immediately. The prerequisite for you is that you register and set up the *PayPal Manager*. A manager account can be set up in the shop administration.

> **Note:** We recommend performing a few transactions in the *Test* mode before you switch the payment method to *Live* and offer it to your customers.

PayPal Pro transactions

Page: Orders ›› Transactions ›› PayPal Pro

Above the icon after the transaction number, you can see the risk information for this transaction. This data is transferred from PayPal. The AVS code (*Address Verification System*) displays the results of the customer data check.

The debiting of authorised amounts can also be triggered as follows:

- Mark the respective table entries and click **Debit**. The status will be changed.
- Open the PayPal Manager by clicking the **Manage transactions in the PayPal Manager** link and start the debiting there. After successfully debiting, the status will be changed in the table.

If the verification of credit card data from PayPal was not successful, the transaction status is set to *Rejected*. The amount cannot be debited.

PayPal Express payment method Checkout

Page: Settings » Delivery and payment » Payment methods » PayPal Express Checkout

For this payment method, the shopping basket data is transferred to PayPal. The further steps of the order process are conducted there. The customer selects his payment method and delivery address there. The order is then finalized in the shop.

Creating a payment method

1. Create a PayPal account.
2. Transfer access data.
   Use the data from your PayPal administration. You can find these parameters under **My Profile** » **API Access** » **Request API access data**
3. Select an operational mode.
   To use the test mode, you need a merchant and buyer account on the PayPal sandbox. To create a new merchant test account, click **Create a PayPal test account on the sandbox system**.
4. Provide an image.
   This is the image that the customer is shown on the payment page at PayPal. Here you can show your shop logo, for example.
5. Select colours for the payment page at PayPal.
6. Save your entries by clicking **Save**.
7. Set the payment method to visible.

Caution: Do not confuse the correct access data for test and the live system.

PayPal Express transactions

Page: Orders » Transactions » PayPal Express

If a transaction has the status *Pending*, it was verified by PayPal and not yet performed. The icon appears in the table. If you click the icon, the reason for this is shown. You must process, confirm, or decline these transactions in your PayPal administration. The status in the table is changed with this as well. The customer receives an e-mail about this.

You are shown whether the buyer has been verified by PayPal with the transaction data.

Google Checkout payment method

Page: Settings » Delivery and payment » Payment method Google Checkout

For this payment method, the shopping basket data is transferred to Google. All additional steps of the order process are conducted there. The customer selects his payment method, enters a delivery address, and finalises the order there.

Check the following settings under **Settings** » **Integration** in your Google Checkout administration pages:

- *Callback method* must be set to *XML*
- *Shopping cart post security* must be enabled

Google Checkout transactions

Page: Orders » Transactions » Google Checkout

Once the customer has confirmed the transaction, the order is displayed in the table with the status *Invoiced*.

The risk information for this transaction is displayed using the icon after the transaction number. This data is transferred from Google.

The columns *Delivery status* and *Payment status* indicate the current status of the transaction. This status can be set in the Google Checkout Merchant Administration.

ClickandBuy payment method

Page: Orders » Transactions » ClickandBuy

Customers that pay using ClickandBuy can either register or create a Prepaid account. ClickandBuy checks the customer entries for completeness and accuracy. After registration and verification, the account is activated.

The prerequisite for you is that you register with and create a merchant account at ClickandBuy.

To set up the payment method, register using **Create new ClickandBuy account**. After completing the registration process, all necessary data are automatically entered into the shop administration and the ClickandBuy administration.

After setting up ClickandBuy, you should perform some test transactions. To set up your ClickandBuy account for test operation, contact your contact person at ClickandBuy. Customers cannot see whether you are operating in live or a test mode before finishing the transaction. Therefore, create a suitable name for the payment method in test operation. In addition, you can include a note about test operation in the notes for the payment method.

Atos Worldline payment method

Page: Orders » Transactions » Atos Worldline

Within this payment method, various payment services are offered. A part of the payment services offered are verification methods such as credit and address checks as well as the *Verified by Visa* and *MasterCard Secure Code* systems.

You must be registered as a merchant with Atos Worldline. You receive a certificate file from Atos Worldline. Save it on your local computer and upload this file using **Browse**. If a certificate file already exists, the name of the file is shown.

For the *Debit* transaction type, the amount is automatically debited from the customer account. The debiting occurs after the set number of days.

For the *Authorization* transaction type, the amount is reserved for you. You must trigger the debiting yourself in the Atos Worldline administration. The reservation is cancelled after the set number of days.

You can integrate your shop logo into the payment page provided by Atos Worldline. To do this you must send the image file containing the logo to Atos Worldline support.

Save your entries by clicking **Save**.

Atos Worldline transactions

Page: Orders » Transactions » Atos Worldline

Once the customer has confirmed the transaction, it is entered into the list of Atos Worldline transactions in the shop administration. No status is set for the order in the shop. A transaction number is shown if the authorisation was successful. The code shows the transaction result; *00* means that the authorisation was accepted.

Sofortüberweisung.de payment method

Page: Orders » Transactions » sofortüberweisung.de

This method allows the order amount to be transferred directly from the customer's online banking account to your merchant account. This payment method is certified by the TÜV and boasts TÜV-audited transaction security.

The prerequisite is registration with so*fortüberweisung.de*.

Once the transaction has been completed successfully, you receive a notification and ship the goods immediately. This means you can offer your customers reduced delivery lead times.

In order for your customers to be able to use the payment method in your shop, you must configure a project for this shop in your s*ofortüberweisung.de* administration. In case of queries regarding the creation and processing of a project, please contact your account manager at *sofortuberweisung.de*.

> ***Caution:*** During set-up of the payment method, the passwords are created and entered in automatically according to the guidelines of sofortüberweisung.de. If you change these values, this payment method might not be able to be used by your customers.

HSBC payment method

Page: Orders » Transactions » HSBC

HSBC checks the customer's payment data and only permits transactions with secure data.

If you have not yet activated your HSBC account, set the operational mode to *Test* and perform a test transaction using your own HSBC account information. If the transaction was successful, set the operational mode to *Live* and activate the payment method for your customers.

An *HSBC* account only supports one currency. If you want to offer the *HSBC* payment method for multiple currencies, you must create an *HSBC* payment method with a separate *HSBC* account for each currency and activate it as described above.

HSBC transactions

Page: Orders » Transactions » HSBC

The *Status* column shows the status of the payment. Debiting of *Authorised* transactions must be done manually by you in the HSBC administration. However, the status of the order is **not** set to *Paid*. You must set this using either batch processing commands or for each order individually.

Moneybookers payment method

Page: Orders » Transactions » Moneybookers

You can offer your shop customers the Moneybookers wallet and all additional payment methods. The prerequisite for you is that you register with Moneybookers and activate the respective payment options.

To create the first Moneybookers payment method, perform the steps displayed in order.

After creating the payment method, the *Wallet* method is selected by default. The drop-down menu is not yet available. Fill out the entry fields and save your entries by clicking **Save**. After this, the drop-down menu is activated and you can change the payment method as required.

To show credit card symbols in the shop, select the corresponding checkbox and save your entries by clicking **Save**. Place the page element for the Moneybookers payment methods that you accept on the Web site. For more information, see *Page elements and navigation*, *on page 121*.

Various payment types can be handled using Moneybookers. However, you must create a new payment method based on Moneybookers for each payment type. This process is simplified by the *Would you like to create another Moneybookers payment method?* function. The function is active after the data for the payment method are saved the first time. Proceed as follows:

1. Click **Would you like to create another Moneybookers payment method?**
2. Select the payment method.
3. Click **Create**.

The new payment method is created. All fields are pre-filled.

Saferpay payment method

Page: Orders ›› Transactions ›› Saferpay

As a prerequisite for using Saferpay, you must first register with Saferpay. To do this, you must sign in to Saferpay and order the *Saferpay eCommerce* package. This package forms the basis for the Saferpay functionality in the shop. You can agree advanced services as part of your Saferpay package. The package defines which payment options are offered to your customers on the Saferpay platform.

Saferpay transactions

Page: Orders ›› Transactions ›› Saferpay

To execute the debiting of authorised amounts, mark the respective table entries and click **Debit**. The amounts are debited using Saferpay and the order status is changed accordingly.

To see the details of the transaction, click the transaction number. If the transaction number is grey, it is a test transaction.

Dependencies

Page: Settings ›› Delivery and payment ›› Dependencies

Here you can set the which payment methods can be used for specific delivery methods and can be selected by customers.

A special assignment is set using the *No delivery* column. You can sell goods or services for which delivery is not required or useful, but that must be paid. Use the *Without delivery* column to assign the products or services that are not shipped to the corresponding payment methods. After creating a payment method the checkbox is selected by default.

> Note: After it has been created, a payment method is assigned to all delivery methods by default. In the same way, new delivery methods are assigned to all payment methods. Remove the check marks for the combinations that you do not offer.

Make sure that at least one combination is activated. Otherwise, no orders can be made in the shop.

Delivery options

Page: Settings ›› Delivery and payment ›› Delivery options

Using delivery options, you can offer your customers a service in connection with the order. This is where you can prepare services such as gift wrapping or similar. The customer can access this service by clicking a link in the shopping basket.

You can set the name for the link in the *Display name in shopping basket field*.

Delivery options: Details - general

The description is shown to the customer during selection of the options. Use these to provide the customers with all necessary information about the specific delivery option.

If you activate the option *Display entry field*, the customer can provide a text about the delivery option. This is useful for delivery options such as greeting cards.

Delivery options: Details - Selection

In **Selection** you can create all variations of a delivery method from which your customer can select. This can be, for example, various images on the greeting card or the type of packaging.

You can describe each variation with a name or a short description. The names are displayed in entry fields. Enter changes directly in the respective field.

You can optionally add an image. For more on using images, see *Uploading images*, *on page 28*. Click the image in order to show it in original size.

Note: The selected variation applies to the entire shopping basket and not for individual products.

Deferred payment

Page: Settings ›› Delivery and payment ›› Deferred payment

You can offer your customers deferred payment for various payment methods. You can activate these in the general settings of the corresponding payment method in the *Deferred payment possible* option button; see *General properties for payment methods*, *on page 47*.

The individual fields for deferred payment have the following meanings:

Table 4: fields for deferred payment

Field name	Description	Field type	Example
Text for "Financing" stage of ordering	This text is displayed on the web site using the table of financing options. Provide your customers with all the information and notes relating to your deferred payment options.	Text field	We can offer deferred payment options for your order. Select ...
Currency	Currency for which you set the monthly rate; One table per currency	Drop-down menu	
Minimum amount	Order amount, above which you offer deferred payment	Entry field, numeric	1000

Field name	Description	Field type	Example
Interest rates for the number of monthly payments	Annual interest rate for term; The possible durations are shown in months in the column headings. Enter values for the durations you offer.	Entry field, numeric	5

Note: For interest rates, simply enter the annual interest rate; the system calculates the monthly amounts.

The customers will be offered a selection of the available financing models in the order process. In the order summary, the financing selected is displayed.

In the *Payment Method* line, in addition to the deferred payment parameters, the additional amount that the customer must pay for using this payment method is indicated.

The instalments are calculated according to the following formula:

$$R = \frac{P \cdot q^{Z} \cdot (q-1)}{q^{Z} - 1} \left(\textit{when } q = 1 + \frac{IR}{12 \cdot 100} \textit{ for continual, monthly payments} \right)$$

Here, Z is the duration in months and P the order value in the currency indicated.

In the ordering process, the APR is also specified along with the interest rate and monthly instalment. This is the compounded calculation. The procedure is defined for Germany in the German Price Indication Ordinance (Preisangabenverordnung – Pangv).

Country settings

In the country settings, you can define the languages, currencies, countries and regions that are used on your Web site. You are responsible for the language-dependent contents such as product descriptions, the content of newsletters, or the correct price in the selected currencies.

Languages

Page: Settings ›› Country Settings ›› Languages

On this page, you can prepare the languages for the Web site and administration areas. For an introduction to this, see *Language-dependency*, *on page 22*.

The table lists all the languages you have activated for the Web site. The appropriate countries are automatically displayed with the language.

For each country, clicking the icon will display the specific formats which must be observed while entering information.

Use the option button in the *Default* column to set the default language for the Web site. An entry must be set to visible before it can be made to the default.

Using the sorting in the *Sorting language* column, you can set in which sequence the languages in the selection field for the are shown. See *Language-dependency*, *on page 22*.

Using the sorting in the *Sorting country* column, you can set in which sequence the countries are shown on the web site.

To activate a new language, select it from the drop-down menu at the end of the table and confirm with **Save**.

> Note: The languages listed in the drop-down menu are part of the installation. If you need additional languages, contact your provider.

Before you can deactivate a language, you must make sure that none of the associated countries are set to *Default* and that all associated countries are set to *Not visible*. Once these requirements are fulfilled, you can deactivate the language as described in *Deleting records*, *on page 21*. The language will still be available in the drop-down menu.

> *Caution*: As soon as you have activated an additional language, check all the objects (products, categories, and so on) for language-dependent fields and enter the translation. If the text data does not exist in the corresponding languages, it cannot be displayed.

If you have set up more than one language for your Web site, you should offer your visitors the option of selecting a preferred language. A corresponding page element is available for this. For more on working with page elements, see *Page elements and navigation*, *on page 121.*

Currencies

Page: Settings ›› Country Settings ›› Currencies

On this page, you can prepare the shop currencies for your customers to select from. The currency the customer selected remains active until a different currency is explicitly selected or the session ends.

Use the option button in the *Default* column to set the default currency for the shop. An entry must be set to visible before it can be made to the default.

To activate a new currency, select it from the drop-down menu at the end of the table and confirm with **Save**.

To delete a currency, follow the steps described in *Deleting records*, *on page 21*. The currency will still be available in the drop-down menu.

> Note: The currencies listed are part of the installation. If you need additional currencies, contact your provider.

> *Caution:* Products which are not priced in a particular currency cannot be put in the shopping basket or ordered in that currency.

In you want to offer products at no charge, such as pamphlets or brochures, enter the price as 0.00.

Special case Swiss Franks

Due to the fact that in Switzerland, the smallest unit of currency is 5 Rappen, all the prices must be rounded to increments of 5 Rappen, that is, every price must end with 5 or 0.

As soon as you enter prices in the currency *Swiss Francs*, the system checks the entry and rounds the price whenever necessary.

Countries

Page: Settings ›› Country Settings ›› Countries

This is where you specify the countries available for users when registering on your Web site, or when entering their address.

To add a new country to the list, select it in the drop-down menu below the table and click **Save**.

To delete a country from the table, proceed as described in *Deleting records*, *on page 21*. This will delete the entry from the table. The country will however still be available in the drop-down menu below the table and can added again at any time.

Note: Note that if you select a country from the list, you must be able to guarantee order processing and delivery in this country. Only include those countries in your list for which you can deliver under the given conditions.

Regions

Page: Settings ›› Country Settings ›› Regions

Regions are the foundation for area-specific delivery and payment methods. Use regions to define which delivery and payment methods are available to your customers in various countries.

The regions are based on countries that you set under **Settings** ›› **Country Settings** ›› **Countries**. For more on this, see *Countries*, *on page 56*. During the order process, the country from the delivery and billing address is checked for assignment to a region.

To create a new region, enter the name of the region in the entry field in the last row. Save your entries by clicking **Save**. Assign the respective countries to the region details. For more information about this, see *Regions - Details - General*, *on page 58*.

To assign a delivery or payment method to a specific region, do the following:

1. Add the country to the country list for the region in **Settings** ›› **Country settings** ›› **Countries**. For more on this, see *Countries*, *on page 56*.
2. Create a new region.
3. Select the corresponding countries in the region details. For more information, see *Regions - Details - General*, *on page 58.*
4. Open the delivery or payment method and select the desired region from the *Allow usage for following addresses* drop-down menu. Save your entries by clicking **Save**.

Note the following when using regions:

- A new delivery or payment method is available in all countries of the shop by default.
- If no countries are assigned to a region, they cannot be entered for a delivery or payment method.
- If all countries for a region are deleted, the associated delivery and payment methods apply to all countries of the shop.
- The customer is notified if he changes the country of the delivery or invoice address and the delivery or payment method that was previously selected is no longer available.
- PayPal Express and Google Checkout cannot be limited to a region because the billing address is not known. These payment methods therefore do not require the settings described in the administration. The delivery methods that are assigned to these payment methods must support the countries that can be selected as delivery countries in the payment system.
- Using regions, you can define various prices for various delivery areas:
  For example, you can have a different price for delivery via UPS in Germany than delivery via UPS shipping to other EU countries. For this purpose, create two regions, Germany and EU. Then create two delivery methods: *UPS Germany* and *UPS Non-EU (except Germany)*. Assign the delivery methods to the corresponding regions.
- The regions should be named so that the customer can immediately see which regions a method applies to.

Regions - Details - General

The name of the region can be edited in the *ID* field.

The table lists all the countries that you have assigned in **Settings** ›› **Country settings** ›› **Countries**.

E-mail settings

The system provides various e-mails for notification, confirmation, and information. You can configure which of these e-mails are sent to the customers. To do this, you must configure certain default settings and activate sending for the relevant e-mail.

In the general e-mail settings, you can include values that are valid for all e-mail events.

You can enter an extended e-mail address in the form of *Name ‹e-mail address›* for all e-mail addresses.

Multiple addresses can be entered. The delimiter is a semicolon.

The coding determines how your characters are processed in the e-mail. *Unicode* is a setting which allows all known characters to be processed, such as umlauts.

> *Caution:* If the default sender e-mail address is not entered, no event e-mails will be sent.

> **Note:** The sender address is the default sender for all e-mail messages. It is used when no other address has been entered for the individual e-mail messages.

E-mail settings - Events

Page: Settings ›› E-mail settings ›› Events

The table shows all e-mails that are sent from the system to customers and exceptionally also to the administrator.

Activate delivery by clicking the check-box for the event. Save your entries by clicking **Save**.

You can configure each e-mail message separately. To do this, click the name of the event to go to the associated e-mail details.

Event e-mail – Details

For the individual events, you can add various recipients and additional texts. The fields are mainly used in e-mails as follows:

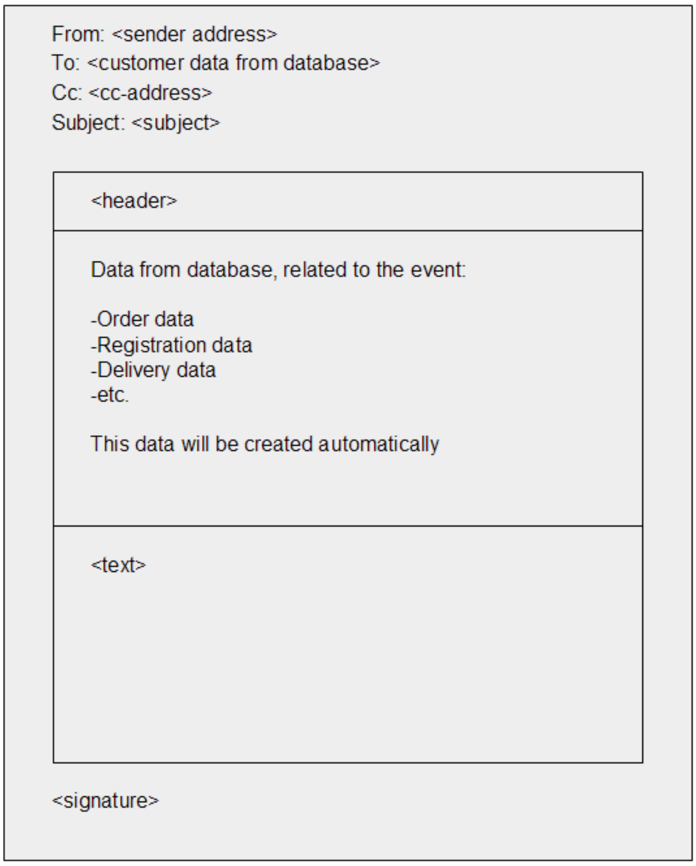

Figure 6: Use of specific fields in the e-mail

Exception: E-mail messages for the merchant

Certain event e-mails are only sent by the system to the merchant:

- *Warning when a minimal stock level has been reached*
- *Product sold out*
- *Change of user address*
- *ClickandBuy – error e-mail*
- *Product inquiries*
- *Product feedback*
- *E-mail from the contact form*

For these e-mail messages, there is an additional entry field *Recipient address* in the general properties. In this field, enter the address of someone you have chosen to handle this topic.

Note the following about the customer contact e-mail:

- To enable customers to be able to use the customer contact form, you must place a contact form as a page element on your Web site; see *Page elements and navigation*, *on page 121*.
- The contact form is only shown on the Web site if a recipient address is inserted for the e-mail event.

Shopping basket settings

Here you can configure the behaviour of the shopping basket by certain events and define basic settings for the order process.

Shopping basket

Page: Settings ›› Shopping basket settings ›› Shopping basket

You can set the following commands and settings:

Use the *“Add to shopping basket” command* setting to determine what happens after a customer puts a product in the shopping basket.

Use the *Adding the same product* setting to determine what happens after a customer puts a product in the shopping basket which is already there.

Use the *Display of function “Add to shopping basket”* function to determine how the button looks that customers use to add products to the shopping basket.

If you set a minimum order value, you can set which parts of the shopping basket are used to calculate the order value. Select a possibility from the selection field *Price of minimum order value relates to total of ...*. The order value calculated in this way is compared to the minimum order value. This setting is independent of the tax model that is used, so applies equally to gross and net prices. Therefore, you cannot have different minimum order settings for different tax models.

The standard is that the tax area is assigned automatically based upon the customer’s address. Using the setting *Enable* s*election of the tax area in shopping basket* you can allow your customers to set the tax area themselves. Remember that you as a merchant must verify that the billing address of the customer corresponds with the selected tax area or that the customer is entitled to make purchases in the selected tax area.

Texts

Page: Settings ›› Shopping basket settings ›› Texts

Frequently, it is necessary to display order information and additional information to the customer in the shop. The following places are available for this:

- above the shopping basket
- below the shopping basket
- on the order confirmation page

You can require your customers to accept your Terms and Conditions during the order process. There is a check box with a text for this You can modify this text here if necessary.

Registration

Page: Settings ›› Shopping basket settings ›› Registration

This option allows you to define the contents of the forms that visitors must complete in the Web site. These are:

- Sign in form for registration (new customers)
- Entry of the billing address on registration, ordering or in **My account**
- Entry of the delivery address on ordering or in **My account**

Click the check box for the desired field in the *Visible* column to display the corresponding field in the form.

Click the check box for the desired field in the *Required* column to include the field as required in the form.

The address fields are included in the form country-specific. The basis for this is the language which the customer has selected currently for the shop.

At the top of the table you can see the system attributes. These are created by default. You may use these fields but not modify them.

In the lower part of the table you can activate the attributes you have created yourself in **Customers** ›› **Customer attributes**. See also *Customer attributes*, *on page 90*. Click the name to edit the details.

> **Note:** To send your customers e-mails for order confirmation and other events you must set the *E-mail* field to required.

Product settings

General

Page: Settings ›› Product Settings ›› General

Here you set whether the product numbers in the shop are shown in product lists and on the product details pages as order numbers.

If prices for variations of a specific product are different, you can enter the corresponding price information. If you show the cheapest variation as the default, you should write for the prices: "*from* xx €".

Inventory

Page: Settings ›› Product Settings ›› Inventory

On this page, you can define how the order process in the shop should continue if an ordered product is no longer available, that is, the stock level is the same or less than *0*.

The function requires that you fill out the *Stock level* field for the products. If this field is not filled, the selected option will be ignored.

If a product reaches the stock level of 0 during an order, the available amount will be added to the shopping basket in the case of options with order stop. Example: For example, two items are on stock but four items have been ordered. Only the existing two items will be added to the shopping basket.

If you increase the stock level of a previously sold-out product, the product will not automatically be made *Visible* again, since there could be other reasons for it to be *Not visible*. You must set the product to *Visible* either in the details or using batch processing; see *Products*, *on page 67*.

You can configure the system to notify you as soon as a product has reached the stock level *0* or has reached or fallen below the minimum stock level. To do this, configure the corresponding e-mail messages in the e-mail settings. For more details, see *E-mail settings - Events*, *on page 58*.

Auto cross-selling

Page: Settings ›› Product Settings ›› Auto cross-selling

As opposed to manual cross-selling (see *Product details – Cross-selling*, *on page 78*), automatic cross-selling is based on analysis of customer buying patterns (according to the principle *Customers that have purchased this product have also purchased the following other products*). In this process, data is collected about how often a product is bought in relation to another product.

Set how many products are shown as auto cross-selling products for one product.

In the *Minimal match* field, set how often a product needs to be sold along with another in order to be displayed as a cross selling product.

> **Note:** The function can slow down the display of products because multiple products have to be read from the database and statistical information is managed and evaluated. Immediate and constant statistical evaluation is also not available for the same reason. The statistics are calculated at times when few users are signed in to the system (usually at night).

Texts

Page: Settings ›› Product Settings ›› Texts

Depending on the tax model, the prices in your shop will be displayed with or without VAT included. A text indicating the current tax model is displayed for the prices. Select the section that matches your tax model for displaying prices on the Web site.

The texts should also be used to inform your customers of any VAT that is or is not included and any additional delivery costs. For example, in Germany the text *Price inc. VAT ex delivery* is common.

You can configure the text as you wish, including for singular and plural prices. The texts can be formatted. For more on formatting, see *Working with text fields*, *on page 26*.

In addition, you can display a comparison price for the current list price. An explanatory text can be prefixed to the comparison price. You can enter this in the field *Text before comparison price*. You can also select to format the price with a strikethrough effect. Do this by selecting the check box *Strike through comparison price*. The preview shows you immediately how the comparison price is displayed in the shop. For more information on the comparison price and how it is used, see *Comparison price on page 71*.

Product comparison

Page: Settings ›› Product Settings ›› Product comparison

This option allows you to enable your customers to compare products in the shop.

If you activate this option, the customer can select and compare any products in the shop. The products are displayed in a table, with all visible attributes. The customer can take products from this table and put them in his shopping basket or save them as a shopping list.

Shopping lists

Registered customers can save shopping lists under *My account*. In these shopping lists, products, shopping baskets, and orders can be saved. To do so, there are links on the corresponding pages.

Use this option to manage the visibility of the shopping lists function.

eBay settings

The eBay interface enables you to offer your products on eBay. The basics about this and how you set up and manage offers is available under *eBay*, *on page 145*.

Preparation

In order to integrate eBay with ePages, you must understand the functions and rules of the eBay platform. eBay offers this information on the eBay site.

Register with eBay as a seller. You will need valid seller registration data to send items to eBay from the shop, offer them there and receive ordering information. All relevant information to sellers can be found on the eBay page under *Sell*.

Configuration of notification e-mail

After an offer is completed, the customer receives an e-mail from the system with a note about conducting the payment. This e-mail is an automatic system e-mail with pre-configured standard content. You may however add your own hints, information, or advertisements. Open the e-mail referring to eBay under **Settings** ›› **E-mail settings** ›› **Events**. For more information, see *E-mail settings*, *on page 58*.

General settings

Page: Settings ›› eBay Settings ›› General

Set when the stock level for the corresponding product is updated, when you place an offer with eBay.

Define a default feedback text which will be used for completed items. You can overwrite this feedback for every offer if necessary. Because of eBay rules, as a seller you can only provide positive ratings.

eBay accounts

Page: Settings ›› eBay Settings ›› eBay accounts

eBay runs different auction platforms for each country. You need to set up your own eBay account in the shop administration for each country in which you wish to set up eBay offers. This determines certain settings such as category lists or available delivery and payment methods.

Before creating an account, you must configure the necessary language and currency. See also *Country settings*, *on page 55*.

To delete an account, proceed as described in *Deleting records*, *on page 21*. The following accounts cannot be deleted:

- If items still exist for this account,
- If the account is set as the default account in the configuration, see *Default values*, *on page 149*.

> **Note:** If you want to create an account for a country which is not included in the drop-down menu, contact your provider.

eBay accounts - Details

Page: Settings ›› eBay Settings ›› eBay accounts ›› [account] ›› General

Enter the location of your shop. The content of the selection fields is provided by the assigned auction platform.

You must authenticate the current eBay account through the eBay platform. The prerequisite for this is a seller account at eBay.

To improve security, eBay has introduced a new authentication mechanism.

You cannot exchange any data with eBay without authentication. The authentication has a time limit and must be renewed periodically. The system checks your authentication details on a regular basis. If they are no longer valid, for whatever reason, you will receive an automatic e-mail with a corresponding error report. In order to receive this e-mail you must set the default sender e-mail address in the e-mail settings. For more information, see *E-mail settings*, *on page 58*.

The following methods exist to authenticate an account:

- Click the **Request authentication** button.

  After this you must sign in to eBay. eBay verifies the information and generates a corresponding token. To transfer this to your shop, you must agree on the eBay page. You will be returned to the shop. You will see confirmation in the authentication field in the eBay account details.

- Using a valid token of another account.

  If you already have an account with valid authentication, you can instead use the token from the other account. The corresponding function is shown in the details of the new account.

> Note: The authentication can only be used from live systems.

Templates

Page: Settings ›› eBay Settings ›› Templates

eBay offers the possibility of presenting items using your own design and layout. You can use this option in your shop administration area by using the existing templates or designing your own.

In the *Selection of template patterns* section, prepared templates exist that you can use in the table and edit if necessary.

The following options are available for adding a new template to the list:

- Proceed as described in *Adding records*, *on page 21*.
- Go to the **Select sample templates** section. Select a template on this page and click **Apply**.

You can edit the name and text of the template in the details; see *Working with text fields*, *on page 26*. You can insert placeholders for product attributes in the text. When creating the item, the actual values for the product are then used. The placeholders are located to the right of the text field. To insert a placeholder, simply click its name. The placeholder is inserted at the current cursor position.

Save your entries by clicking **Save**.

Instructions about using these templates with your eBay offers are available in the description of the eBay assistant in *Title*, *on page 147*.

> Note: Due to security reasons, eBay restricts the use of active page contents such as JavaScript, Flash, and so on. If you use such elements in your templates, it is possible that your pages will not be displayed properly on eBay. For this reason, check how your items on eBay are displayed and make any necessary changes to your templates.

Settings for order documents

Order documents can be created as PDF documents and sent via e-mail. You can define basic settings for texts and sending invoices.

Texts

You can create one print template for every document type. This is also used to create the specific PDF document.

This template is filled with example data and entry areas for text. Click in a text field in order to edit the corresponding template.

Printing the header and footer is done using the *Display header and footer* option. If you use corporate letterhead which already has a header and a footer, activate, *Only for PDF documents*. In this case, headers and footers are only shown in the print template for PDF files. For printing on paper, they are not overwritten.

Invoices in e-mails

You can make it so that whenever you set a specific order status, an e-mail with the invoice as a PDF document is sent automatically.

The invoice must be generated previously. If multiple invoices exist, the last created will be sent.

The corresponding checkbox can be selected only after the e-mail event which belongs to it was previously activated. To do this, click the link to the checkbox of the connected e-mail event. Set the option for the event in the details under *Activated* to *Yes*.

6. Products

Page: Products

The table lists all the individual, main products, and product bundles. To display the variations to the main products in the table, you must perform a search.

To open the details of a product, click its name. Clicking the icon to the left next to the product number opens a new browser window containing the product details.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch processing in tables*, *on page 21*. The following specialised actions can be performed:

Table 5: Specialised batch processing commands for products

Command	Comment
Duplicate	The system creates a copy as a new product with its own unique product number, since every product number may only exist once. The duplicate is created as *Not visible*.
Export	Export the selected products. See *Export*, *on page 31*.
Assign to category	The category is selected using a drop-down menu in the second stage after starting the command. As soon as a certain total number of categories for the shop is exceeded, you can select a target category using a special category browser.
Assign product portals...	Assigning selected products to active product portals can be performed in two steps: 1. Select the desired products and start the command. 2. Select the portals to whose export lists the products should be added, and complete the process by clicking **Assign**. If the *Export all products* option is activated for a portal, it cannot be selected here. See also *Product portals*, *on page 140*.
Set *New* marker	Highlighted products are all flagged immediately as *New*.
Remove *New* marker	Marked products are no longer displayed as new products.

To create a new product, refer to *Creating a new single product*, *below*.

The function to delete all products is available in the **Product settings** on the **General** tab.

Creating a new product

The submenu offers the following possibilities for creating a new product:

- Creating a single product; see *Creating a new single product*, *below*
- Creating a product with variations; see *Creating a new product with variations*, *on page 68*
- Creating a product bundle; see *Creating a product bundle*, *on page 68*

Creating a new single product

The following methods exist for creating a new single product:

- Direct entry in the table
- The **New** ›› **Product** function in the sub menu

The entry fields in the last row of the table are available for direct entry. Proceed as described in *Adding records*, *on page 21*, and save your entries by clicking **Save**.

The following specifications apply to products created in the table directly:

- the product number is a required field
- the name entered is assigned to the language of the administration
- the price entered is valid for the currency displayed in the table
- The new product is set to *Not visible* .
- the new product is not assigned to a category.
- the default product type is assigned to the new product.

You can edit all remaining parameters in the product details; see *Product details – General* , *on page 71*.

If you create a product using the **New** submenu, you will be forwarded to a page where you can enter the general product details. First, enter a unique value in the *Product number* field. Having done this, enter additional general information; see *Product details – General* , *on page 71.*

After the general product details have been saved, additional tabs will be activated. Enter the remaining information as described in *Product details – Images*, *on page 72* and following.

Note: Visibility is set to *Not visible* by default. When all information has been entered, set the product to *Visible* in order to display it in the shop.

Creating a new product with variations

To create a product with variations directly, click **New** ›› **Product with variations** in the sub menu.

This forwards you to the page where you can enter the general product details. First, enter a unique value in the *Product number* field. Having done this, enter additional general information; see *Product details – General* , *on page 71.*

Save your entries by clicking **Save**.

Having done this, you will be forwarded to the product variation assistant directly. For more information, see *Variation assistant*, *on page 74*.

For the basics about variations, refer to *Product details – Variations*, *on page 74*.

After creating the variations, all other tabs are activated. Enter the remaining information as described in *Product details – Images*, *on page 72* and following.

Creating a product bundle

A product bundle is a packet or set made up of products that belong together and that are then offered together for a combined price.

To create a product bundle, click the **New** ›› **Product bundle** link in the sub menu.

This forwards you to the page where you can enter the general product details. First, enter a unique value in the *Product number* field. Having done this, enter additional general information; see *Product details – General* , *on page 71.* Note the following exceptions:

- You cannot enter any values in the *Stock level* and *Minimum stock level* fields. These values result from the smallest values of each of the individual products.
- The *Reference unit* field and the corresponding *Amount in product* field are inactive. This is because the packages cannot be compared to other products as they are compiled individually.

Save your entries by clicking **Save**.

After saving, additional tabs will be activated. You are forwarded directly to the **Bundle products** tab. This tab is displayed for product bundles in place of the **Variations** tab. Enter the associated products here; see *Bundle products*, *below*. After this, enter the remaining information as described in *Product details – Images*, *on page 72* and following.

Bundle products

For product bundles, you must select and compile the products that make up the packet. These are the bundle products.

The table lists all the products which belong to the current product bundle. To open the details of a product, click its name. Clicking the icon to the left next to the product number opens a new browser window containing the product details.

To remove a product from the product bundle, select it and click **Remove assignment**. The product is removed from the table without any confirmation. The product itself is not deleted.

The total price of the individual items is compared with the bundle price below the product list. The price difference is also displayed. The contribution of a product to the total amount is calculated using the quantity and the list price per item. These values are updated whenever you save.

Import and export of product bundles

The import or export of bundles is a combination of the import/export of the products and their assignments.

The products used must exist. Create the products used manually or import them before importing the bundle assignments. During import of bundle assignments, missing products are not shown.

The bundle assignments are included in the import and export files for cross selling. Therefore, after the product import, you must also perform a cross selling import.

To import a product bundle, proceed as follows:

1. Create a file for the product import which contains the data for all products that belong to the bundle. Use the export file as a template for this.
2. Enter for the product which is the bundle itself (base product) in the *Product bundle [IsBundleProduct]* column a *1*.
3. Import the product data for the object type *Products* with the import.
4. Create a file for importing bundle assignments. Use the export file of the type *Cross-selling* as a template for this.
5. Enter for every row with a bundle product the value *BundleProductMap in the Type [Class]* column.
6. Enter for every row with a bundle product the product number of the base product in the *Base product [Product]* row.
7. Fill out the other columns according to the template.
8. Import the bundle assignments with the import for the object type *Cross-selling*.
9. Check in the product table whether the bundle product was correctly created.

Required fields for importing the bundle assignments based on the cross-selling import are:

- [Class]
- [Product]
- [TargetProduct]
- [Job title]

If the *Quantity [BundledQuantity]* column is not present in the import file or is empty, the value of “1” will always be assumed.

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 30*.

Notes about bundles

You should note the following information about working with product bundles:

- The stock level and minimum stock level of the bundle are determined by the smallest respective value for the individual products.
- After the order has been placed, the inventory for all the associated components is updated at the same time.
- Only products of the same VAT class can be assigned to a bundle.
- The status *Not for sale* is taken into account for bundle products. If one of the bundle products is set to *Not for sale*, the entire bundle cannot be bought.
- The unit price is calculated by adding the respective list prices of the individual products together. Any price discounts defined in the price lists are not considered at this point.
- As soon as products have been added, the total of the list prices of the individual products is displayed next to the bundle price. The price difference, possible the saving, is displayed.

Creating a downloadable product

Using downloadable products, you can offer digital products such as images, documents, and other files.

To create a downloadable product, in the submenu **New** click **Downloadable product**.

This forwards you to the page where you can enter the general product details. First, enter a unique value in the *Product number* field. Having done this, enter additional general information; see *Product details – General* , *on page 71*

Save your entries by clicking **Save**.

After saving, additional tabs will be activated. You are immediately led to the **Downloads** tab. This tab only exists for downloadable products. Upload the files which belong to this. See *Downloads, below*. After this, enter the remaining information as described in *Product details – Images*, *on page 72* and following.

In the **Product settings** under **Downloadable product**, you can set when the files are available to be downloaded. You can set whether the customer can download the files immediately after completing the order or only after payment.

In the detail view of the order, you can send the links for downloading manually. In the editing mode, you can change the limits for downloading for this order.

Downloads

In the table, you can see all the files that you have uploaded for the current downloadable product.

If you want to upload files directly, click **Upload file**.

If you have saved the files to an external server and the customer should download them from there directly, click **Link file** and enter the URL of the file.

Click the file name to open the file.

The order in which the products are displayed is defined by the numbers in the *Sort order* column; see *Sorting using sorting keys*, *on page 22*.

In addition, you can limit downloading of the current downloadable product by the customer as follows:

- By time: Limit the time during which the customer can download the files.

- Quantity: Limit how many times the customer can download the files.

It can be useful for the sale of downloadable products to not put any files here. This applies to software or documents that you need to customize for the customer. In this case, you are responsible for sending the files yourself.

Product details – General

Page: Products ›› [product] ›› General

Inventory

Manage the stock level of your products in order to show your customers availability. You receive an e-mail when the stock level reaches “0”, see *Exception: E-mail messages for the merchant*, *on page 59*62. In addition, you can define the shop’s handling of products that reach a stock level of “0”. See *Inventory, on page 61*.

For variations, create a stock level for the main product which is always used when creating a variation.

The minimum stock level is the value below which you should order more of the product. The minimum stock level should not be smaller than the minimum order quantity. You can configure the system to send you an e-mail if the stock level falls to the minimum stock level; see *Exception: E-mail messages for the merchant*, *on page 59*.

> Note: If you cancel an order (order status *Rejected*), the stock level for the product in question is corrected automatically.

Reference unit

In order to compare the prices of similar products with differing quantities, there needs to be a common starting point. Therefore, (according to PangV in Germany), a comparable unit of quantity is to be indicated as the reference unit. This means that, for example, for a 375g package of breakfast cereal, the 1kg price is entered.

The system calculates the reference price using the values in the *List price*, *Reference unit*, and *Amount in product* fields.

Comparison price

The comparison price is a price that you can contrast with the current sale price of a product. This allows you to show price reductions or special prices in an eye-catching way. You can configure one comparison price per currency for each product.

Once a comparison price is entered for a currency, it is displayed in the shop for the corresponding product along with the current list price. To describe the price comparison, you can add text and define the way the comparison price is to be displayed. For more details, see *Texts*, *on page 62*.

> Note: The comparison price is only used for display purposes. It is not a sale price and is not used to calculate discounts or bulk prices.

Delivery entries

If you want, you can also set delivery data for each product. These include the delivery weight and dimensions of the product.

You can also restrict the product to specific delivery methods. This allows you to restrict specific delivery methods for specific products.

Description

Page: Products » [product] » General » Description

The product descriptions are important for the presentation of products in your shop. In addition, they are evaluated during the product search in the shop. In addition, they are also important by enabling your products to be found in search engines. The more you invest in the description, the better are the chances that your product pages will be listed at the beginning of Google results. Use the WYSIWYG editor for entry and design.

The field *Keywords for search* is mainly used by the search that the customers perform in your shop. Enter alternative descriptions or spellings under which the product should be able to be found.

> Note: Trusted Shops warns against using company brand names and labels as keywords for a search engine. It is recommended that questionable search terms are not used. Questionable terms are those which are capable of being mistaken for trademarked names or those which are identical with trademarked terms.

Attributes

Page: Products » [product] » General » Attributes

You can use the *Product type* drop-down menu to assign a product type to the current product. This sets additional product attributes; see *Product types*, *on page 80*.

The relevant attributes will be displayed according to product type. These can be edited to suit the current product. Save your entries by clicking **Save**.

> Note: Once a product has variations, the product type assignment can no longer be changed.

Product details – Images

Page: Products » [product] » Images

Product images are displayed at various places: in promotional products, as part of product lists and obviously also in the product details. You can provide images in various sizes, as well as group them together to form image galleries and slideshows.

There are two areas in which a product's images are managed: **Views** and **Gallery / slideshow**.

Views

The images are made available here for display in product lists and product details. Since the images can be displayed in different sizes on different pages, the images are generated in various sizes:

Table 6: Product image formats

Format	Description
List view	This image will be used in product lists. A product list can be the representation of the products in a category, or the results of a search.
Details page	This image will be displayed on the product details page and on the home page. It can be used in an image list or slideshow with other images in the **Gallery / slideshow** section.

Format	Description
Enlarged view	This image is shown in a new window to a maximum size of 800*600px, when the visitor clicks the product image in the product details.
View for promotional products	This image is displayed using the page element *Promotional in box format*.

You can upload images usually using the **Upload file** button. For more details, see *Uploading images, on page 28*. The individual formats can be prepared as follows:

- Create all formats automatically when master image is uploaded

  When uploading the image using the large image upload button, all formats are created automatically. An image in the specified size is created for each format. Any existing images are overwritten.

- Create formats individually

  You can upload a separate image for each format. Use the button which applies to the correct format. This allows you to set whether the image size should be modified during uploading.

Each image that is uploaded to the **Views** section is stored in the image list in the **Gallery/slideshow** section.

Gallery/slideshow

On this page, you can upload and manage images that you want to show additionally on the product details page in the image list or in a slideshow. The following options are available to adding images to the list:

- Upload the image as a master image or individual format in the **Views** section.
- Upload the image via the image upload button in the bottom row of the table. See also *Uploading images, on page 28*.

In the table, you can see all the images that you have uploaded. If you want to display an image in the product details, check the corresponding check box in the *Visible* column. The display sequence of the images on the Web site is defined in the *Sorting* column. See also *Sorting using sorting keys, on page 22*.

To the right of the table you can see the preview area. If you move the mouse into the display area of the slideshow, the control elements are displayed.

The display of images and the slideshow in the shop on the product detail page are set using the display option for the product type. See *Layout, on page 81*.

Caution: If you delete the image to which the views in the **Views** section belong, the views will be deleted too. No further images will be displayed in product lists, etc., for this product.

Note: Slideshows can only be viewed in the shop if JavaScript is enabled in the customer's browser.

Product details – Categories

Page: Products » [product] » Categories

The table lists all the categories to which you have assigned the current product. To assign a product to a category, select a category from the drop-down menu under the table.

As soon as a certain total number of categories for the shop is exceeded, selection of a target category is performed using a special category browser. Mark the required category.

Note: A product should always be assigned to at least one category.

To remove the assignment to categories, select the corresponding categories in the table and click **Remove assignment**.

Note: You are not required to confirm this command as no data is being deleted, only the assignment.

Product details – Variations

Page: Products ›› [product] ›› Variations

Variations are products of the same type that only differ in terms of the values of one or more properties. A good example of this is items of clothing such as t-shirts or one type of jacket. Typical differentiating criteria include the properties size or colour.

The variations are generated from the original product. This is the master product or main product. The variations are called variation products or sub-products.

The simplest way to create variations is to use the variation assistant. This can be used to create variations and to add new variations. See *Variation assistant*, *below*.

Note the following: when working with variation products:

- Variation products are completely separate self-contained products. You can modify any individual property if necessary.
- If you delete the master product, all the derived variation products will be deleted as well.
- You cannot derive any further variations from a variation product.
- When it is created, the variation product inherits the price of the master product. Using the *Own price* option field in the general product details you can configure whether a different price should be set for this variation product. As soon as this option is activated, you can also access the **Prices** tab and set the discounts for this variation.
- Category assignments made via the master product cannot be removed from the variation product. However, additional assignments to other categories can be made.
- The images of master products and variation products are managed together. If you want to delete the images of a variation product, first check that there are no other products that use these images.
- The order in which the products are displayed is defined by the numbers in the *Sort order* column; see *Sorting using sorting keys*, *on page 22*.
- The variation product marked as default is displayed in the shop as the default variation product.

Variation assistant

The product variation assistant helps you to create variations for a product quickly and simply. The assistant can be started in the following ways:

- Use the **New** ›› **Product with variations** function from the product context menu.
- Open it directly from the **Variations** tab in the product details. There you can click the **Start product variation assistant** link.

Perform the following steps in the assistant:

1. Attributes and values

On this page, select the product type and variation attributes.

All available product types are listed in the *Product type* drop-down menu. Select the appropriate entry. If you need a new product type, select the *New product type* entry in the drop-down menu and enter the name in the *Name* entry field. Two attribute edit areas are displayed. Edit these attributed as described in the following.

If the selected product type has no variation attributes yet, create new attributes with values as described later.

After selection, the available variation attributes are displayed. Each attribute is displayed in its own edit area. Using the check boxes, you can specify whether the corresponding attribute should be used to create variations. Existing values are displayed.

If you need an additional value for an attribute, enter it in the entry field below the corresponding value list. If you need additional values, click **Show more fields** and enter the values in the new fields.

If you need a new attribute, click **New attribute**. Enter the name and edit the values as with existing attributes. For new attributes, you can determine whether the attribute values should be language-dependent. The values for the other languages are entered later in the details for the corresponding attribute of the product type.

> Note: In the wizard a maximum number 10 values can be entered per attribute. A message is displayed to indicate when you have entered the maximum number of attribute values. If you need additional values, you must enter these directly for the corresponding product type.

Click **Next** to go on to the next step.

When doing this, please note the following:

- Existing attributes are displayed in grey. The available values cannot be changed. You may still add values.
- Existing attributes can only be deleted in the details of the relevant product type.
- If variation products have already been created, the product type assignment cannot be changed. The drop-down menu is displayed in grey. You must first delete all relevant variation products before changing the product type assignment.
- If you would like to create additional attributes for the new product type, open the details of the product type.
- Read about prototypes in *Product types*, *on page 80*.

2. Variation products

On this page, you can see the variations which can be made by combining the attribute values.

The name consists of the product number of the master product and a sequential integer.

The variation products are generated for the selected variations. If you do not want a variation product for a variation to be generated, remove the selection.

If a variation product has already been created for a combination, the entry is displayed with a grey check box. These entries cannot be changed as long as the relevant variation product exist.

3. Finish

On this page, set how the variation products are displayed in the shop. Select this desired option by clicking the corresponding option field. See also *Layout*, *on page 81*.

Click **Finish** to end the assistant, save all settings and generate the variation products.

Extending a variation using the product variation assistant

Start the product variation assistant in the **Variations** tab. There you can click the **Restart product variation assistant** link.

1. Create a new variation attribute with values as described in step 1 of *Variation assistant*, on page 74.
2. The existing variation products must also be assigned a value for the new attribute. In the next step, select the value that should be used for the existing variations. After selection, click **Next** to display the possible product variations.
3. When the product list is displayed, continue as described in step 2 of *Variation assistant*, on page 74.

Product details – Prices

Page: Products » [product] » Prices

For every product, you can create bulk prices and discounts as well as a list price.

You can configure the following price reductions:

- Bulk discount/prices; see *Bulk discount*, *below*
- Value discount; see *Value discount*, *on page 77*
- Shopping basket discount, see *Shopping basket discount*, *on page 82*

As soon as you have configured price reductions for a product, a **Price reductions** link will be shown in the product detail view in the shop. The customer can click this link to see the price reductions. You can show special product prices to registered customers immediately as well. See *Price lists – Advanced settings*, *on page 81*.

Bulk discount

Page: Products » [product] » Prices » Bulk discount

In this section, you can configure discounts based on unit numbers. You can define bulk prices and/or percent discounts. The prices and reductions are connected to a price list in which you can set the validity period and the customer or customer group; see *Price lists*, *on page 81*.

In the table you can display and edit two price lists at the same time. This lets you compare, for example, lists for different currencies or periods of validity.

The icon to the left of the drop-down menu shows whether the price list is currently active. You can click this icon to call up details for the price list being displayed.

> Note: The price lists in which the current product is already included are marked with an asterisk *. This gives you a quicker overview of which price lists are associated with the product.

Note the following:

- You can set both a bulk price and a discount for a quantity. If you offer both bulk pricing and a discount, the bulk price will be charged first and then the discount is subtracted; see *Discount calculation for product prices*, *on page 78*.

- The discount entered last effects all subsequent list entries if no other discounts are entered. To remove the discount on subsequent entries, enter a *0* in the next discount field or the affected discount field. The following example in *Figure 7* should explain this:

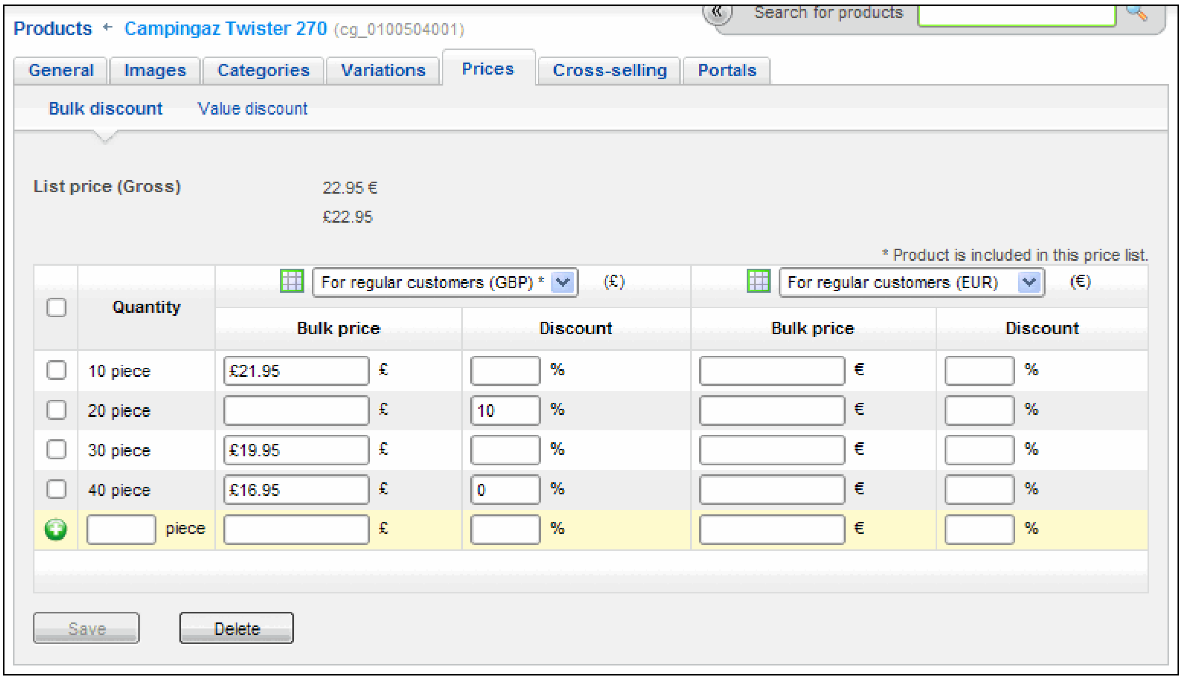

Figure 7: Bulk discount for products

If the customer purchases 10 products, each product costs $21.95. The total price for these 10 products would be $219.50.

If the customer purchases 20 products, each product costs $21.95. For the total product sum ($439), a 10% discount is provided ($43.90). The total price for 20 products is then $395.10.

If the customer purchases 30 products, each product costs 19.95. The discount from the previous entry is still valid. For the total product sum ($598.50), a 10% discount is provided ($59.85). The total price for 30 products is then $538.65.

If the customer purchases 40 products, each product costs $16.95. The total sum for the products is $678. 0% discount is entered. Therefore, the 10% are no longer valid. No additional discount is provided. The total price for these 40 products would be $678.

Note: Remember that you can create customer-specific and customer group-specific price lists. You can define prices for individual customers by entering the price or discount for the amount of *1* and assign only the one customer to the list.

Value discount

Page: Products » [product] » Prices » Value discount

In this section, you can configure a price reduction which depends upon the total price. The value discount is joined to a price list in which you can also set the validity period and the customer area; see *Price lists, on page 81*.

The icon to the left of the drop-down menu shows whether the price list is currently active. You can click this icon to call up details for the price list being displayed.

Note: The price lists in which the current product is already included are marked with an asterisk *. This gives you a quicker overview of which price lists are associated with the product.

If you have configured bulk discounts as well as value discounts, the price is calculated as described in *Discount calculation for product prices, below.*

Discount calculation for product prices

Since you can assign more than one discount for each product, the sequence for calculating the discount needs to be defined. The individual discounts are calculated sequentially as follows:

1. Calculation of the bulk price based on the product price; this results in a reduced unit price per product for the corresponding number of items.
2. Calculation of the bulk discount based on the bulk price
3. Calculation of the value discount; The total from bulk pricing minus the quantity discount is compared with the limit for the value discount. If the limit is exceeded, the value discount is applied.

Product details – Cross-selling

Page: Products » [product] » Cross-selling

When using cross-selling, additional products are offered in relation to a particular product. These are accessories or related products. The purpose of this offer based on related products is to motivate the customer to buy additional products as well as the current product.

Accessories

Accessories are products that extend or improve the functionality of the basic product or are necessary to use the product (fuel, batteries, and so on).

Related products

Products that lend themselves well to being related products are products that enhance the functionality of the base product, that are necessary to use the product, or that make using the product more comfortable, for example, torches for tents, and so on.

Alternative items

The alternative items function is not so much about offering the customer product enhancements. You present alternatives to the selected product in the form of a product comparison. You can use this function to show the customer similar products you are offering and draw his attention products for sale that he otherwise may not have viewed.

References

The table shows an overview of the products the current product is linked with and the type of link. In addition to the various cross-selling types, assignment to a product bundle is also displayed.

Accessories and related products are shown in the shop on the product detail page. The **Alternative items** link provides information about alternative items on the product detail page.

You can set the display sequence of cross-selling products in the shop using the sorting key in the corresponding table. See also *Sorting using sorting keys, on page 22*.

The *Create reciprocal assignments* check box allows you to configure whether the assignment of a new cross-selling product should be made reciprocally. The following example demonstrates the procedure in more detail: Product A is the first product. Product B is to be assigned to Product A as a cross-selling product. If reciprocal assignment is activated, product A will also be assigned to product B as a cross-selling product of the same type at the same time.

> Note: Clicking **Remove Assignment** only removes the assignment of products to each other. No products are deleted. For this reason, deletion confirmation is not requested.

Import and export

You can import and export cross-selling assignments. Note that you only transfer the assignments this way. The products used must exist. During import of cross-selling assignments, missing products are not shown. Create the products used manually or import them before importing the cross-selling assignments.

Required fields for import are:

- [Class]
- [Product]
- [TargetProduct]
- [Position]

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 30*.

Variation products and cross-selling

The following methods exist for assigning cross-selling products to variation products:

- Manual assignment using the **Cross-selling** tab of the variation.
- assignment using the master product (variation products inherit the cross-selling products of the master product).

The cross-selling products inherited from the master product are displayed in the table above the manually assigned cross-selling products. You can not edit the *Comment* and *Sort order* fields directly for the inherited cross-selling products.

To edit the entries in these fields, proceed as follows:

- Create a second cross-selling product for the cross-selling product for which you want to change the values; see *Adding records*, *on page 21*.
- Enter the desired values in the *Comment* and *Sort order* fields. Save your entries by clicking **Save**.

Product details - Portals

On this page, you can see the available portals for product export and the existing eBay items and orders for this product.

Product portals

Page: Products ›› [product] ›› Portals ›› Product portals

The table shows an overview of the available product portals and the portals to which the current product is currently being exported. To assign the current product to a list for a portal, click the relevant check box.

eBay

Page: Products ›› [product] ›› Portals ›› eBay

All eBay items based on the current product are displayed in this table. The table is comparable in composition and function to the table for all eBay items. See also *Items*, *on page 145* in the *eBay* chapter.

On the product eBay page, you can immediately create a new item for this product. To do this, click **Create new item.** The item will be generated with the default values. See also *Default values*, *on page 149*. To edit item details, see *Item settings/eBay assistant*, *on page 146*.

In the case of master products, the variation products are displayed in the table.

Product types

Page: Products ›› Product types ›› General

Product types include additional attributes for products.

All products have the same standard attributes such as product number, name, and description. In addition, additional attributes can be assigned such as colour or size. Such additional attributes are defined in the product type. Through assigning a product type to a product, additional attributes for the product can be used. Product types thus allow grouping of products with similar qualities.

If you change the product type assignment, you change the set of additional attributes for the product. The current additional attributes of the product are displayed in the general product details in the **Attributes** section. See *Attributes*, *on page 72*.

A special type is the *Source product type*. For one thing, this new product type will be automatically assigned to new products. For another, this is the source product type for all other product types. All attributes of this product type are passed to the other product types when they are created. In this way, you can specify additional attributes that apply to all products. The shared additional attributes can only be deleted via the source product type.

The source product type itself cannot be deleted.

> Note: If you do not want any shared additional attributes, delete all attributes from the source product type.

> *Caution:* A product type can only be deleted as long as no products are assigned to it.

Import and export

You can import and export product types.

Required for import is the [*Alias]* field.

If the *[Alias]* is empty, the system uses the standard product type and changes its values.

If a columns in the import file do not contain any values, the values in the database will not be changed.

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 30*.

Product type details

Attributes

Page: Products ›› Product types ›› [product type] ›› Attributes

The attributes which are available from the source product type are shown first in the attribute list. Visibility and sorting can only be changed on the source product type. Deletion is also only possible at the source product type.

You can set your own sequence for the attributes that are especially defined for the specific product type. For more details, read *Sorting using sorting keys*, *on page 22*.

Caution: When you delete an attribute, all the product data contained in this attribute is lost.

In the case of attributes with value selection and options, you must also create and edit the value pool in the **Value selection** tab. For more information see *Using text with value selection*, *on page 24* and *Using options*, *on page 26*.

An overview of all attribute types is available here: *Attribute types on page 23*.

Layout

Page: Products ›› Product types ›› [product type] ›› Layout

Using the layout options for a product type you can configure how the product information is displayed displayed in the product detail page of the shop.

You can use the following layouts:

Table 7: layout variations for product display

Layout	Comment
Product details	Alignment of product image and descriptive text to each other in the product view in the shop
Variations	Shows the variations for a product; If a large number of variations for a product exist, select the layout using a drop-down menu. This allows the page to be displayed more quickly and increases clarity. If only a few variations have been created, we recommend the table layout is used. Image lists are best used if a small number of variations with different images are to be displayed.
Bundle products	Shows individual products for a product bundle; The compact layout displays the products with an image and the price. Table layout is best suited for displaying a large number of products. List view corresponds to the product list in a category.

Price lists

Page: Products ›› Price lists ›› Overview

Price lists form the basis for customer-specific pricing and discounts. A price list defines the validity period of the price reduction and the affected customers or customer groups. The prices themselves are set in the product assigned to the price list; see *Product details – Prices*, *on page 76*. In addition, shopping basket discounts are configured using price lists.

Caution: Only one price list can be active for a customer and customer group at one time.

Price lists – Advanced settings

Page: Products ›› Price lists ›› Advanced settings

Here you can set which prices are displayed for the customer in product lists and product details.

If the option *Take account of bulk and value discounts based on price lists* is active, then the customer sees the prices that apply to him in the product lists and product detail view.

The prerequisites for this are:

- A special price must be entered for **one** ordering unit in the price list, such as one piece.
- The price list is currently valid.
- The customer belongs to a customer group that has been assigned to the price list.

Other price reductions such as bulk prices for larger purchase quantities are displayed on the product detail page using the **Price reductions** link.

Note: Usage of this option reduces the display speed of the corresponding page because the prices must first be calculated.

Price list details

Page: Products ›› Price lists ›› [price list]

You can limit the applicability of the price list to customer groups and individual customers.

The available customer groups are listed in the drop-down menu beneath the table on the **Customer groups** tab. You must first create customer groups under **Customers** ›› **Customer groups** to be able to use them for price lists. See also *Customer groups*, *on page 89*.

To be able to assign customers directly, enter the customer number on the **Customers** tab or paste customers from the tray.

Note: Direct customer assignment has a higher priority than customer group assignment. If one price list is valid for a customer directly, and a second price list is valid over a customer group assignment, the customer-specific price list only applies for the customer. This applies to bulk pricing and discounts as well as for the shopping basket discount.

Shopping basket discount

Page: Products ›› Price lists ›› [pricelist] ›› Shopping basket discount

Use this function to give your customers discounts on their shopping baskets. You can scale the price reduction according to the shopping basket value. You can assign absolute values or percentage discounts. The shopping basket discount is displayed on the product detail page using the **Price reductions** link.

Note: The shopping basket discount you allocate applies to the total of the products. Any charges for delivery and payment are not included in the calculation.

In the shopping basket, the customer is shown the difference to the next discount level.

Search statistics

Page: Products ›› Search statistics

The search statistics provide an overview of the search terms used in your shop by your customers and how often they are used. The table lists all the search terms your customers have used. They are all written in lower-case letters because capitalisation is not considered in the search.

For every search term you can see how often it was used and how many hits it yielded.

The following considerations or actions are recommended:

- Use search terms that have no hits in descriptions or product names.
- Use the search terms as keywords for products that you offer in these areas; see the *Keywords for search* field in *Description*, *on page 72*.
- Fill any existing gaps in your assortment by adding often searched for products.
- Display products which are searched for often on the start page or in main categories so that your customers find them immediately.

Product reviews

Product feedback gives your customers the opportunity to give their opinions on the products and discuss their own experiences. Customers are able to award points from 1 to 5, and can also enter some feedback text.

The ratings provided most recently will be listed in the table at the top.

You should receive an e-mail notification when product ratings are submitted for your shop. Create an corresponding e-mail event by providing a recipient e-mail address. For more information, see *E-mail settings*, *on page 58*.

Settings

Page: Products ›› Product ratings ›› Settings

This option specifies who is permitted to submit ratings, and when the ratings will be visible in the shop. If, for example, you want to moderate the ratings before they are published, set the option *Display new product ratings immediately* to *No*.

Remind your customers to rate the products they purchased. To do so, you can set up the automatic sending of a corresponding e-mail. This asks the customer to provide a product rating. Set how many days after the order arrives that the e-mail will be sent to customers.

Import and export

Page: Products ›› Import and export

You can import and export products as well as the complete product catalogue.

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 30*.

Products

During product import/export, all data that directly belong to the product are transferred.

To create new products, the *ID [Alias]* is required for the import file.

In the import file, you can enter the file name (such as camera_s.png) or a links to the image file (for example, http://imageserver/ProductImage/camers_s.png). The references are used if the image is already available anywhere in the Internet. If only a file name is provided, the image must be uploaded to the product details previously and the corresponding views must have been generated.

A simplified process exists to importing many products with their corresponding images. This is described on the page for product import in the *Tips and tricks* area under **Import images to products and categories during product import.**

Product catalogues

Importing a product catalogue occurs through multiple steps, since not all data can be provided in one file. When importing this data, a sequence must be observed. This is described on the page for product import in the *Tips and tricks* area under **Import product catalogues from other systems**.

> Note: Some functions in the application will open in new browser windows. For this reason, your browser must allow pop-up windows to open. Otherwise, certain functions cannot be used.

BMECat import

Page: Products ›› BMECat Import

BMECat Import supports BMECat version 1.2 with the transactions ‹T_NEW_CATALOG›, ‹T_UPDATE_PRICES›, ‹T_UPDATE_PRODUCTS›.

The various fields have the following meanings:

Table 8: fields for BMECat import

Field name	Description	Field type	Example
Import file	Either enter the name of the file with its path directly or click **Browse** to search for the file.	Entry field, alpha-numeric	C:\BMECat\import.xml
Import mode	*Only verify data*: The XML file is examined for syntax errors, missing elements, incorrect external links, incorrect units, and so on. *Import and verify data*: The XML file is examined and imported.	Option button	
Import contents	Here you decide if the catalogue structure is also to be imported. If you only import the products and the assignments, you must make sure that the corresponding categories have been created.	Option button	
Set new categories to visible		Option button	
Set new products to visible		Option button	
Tax area	The tax area must be selected before the correct tax class can be assigned.	Drop-down menu	

Save your entries by clicking **Save**.

> Note: If you select *Only verify data*, the internal dependencies and the possibility of error-free import are not checked. This test is conducted before import.

The errors and warnings generated by *Import and verify data* are displayed. If you consider the warnings to be unimportant, you can ignore these. A mistake while importing a record will cause the import to be aborted.

Note the following general points:

- feature grouping systems and classification systems will be ignored,
- Buyer and supplier information will be ignored,
- User-defined extensions will be ignored.

Product search in the administration area

The search allows you access to individual products or product groups simply and conveniently. The easy-to-use search offers numerous filtering possibilities. For basic information on using the search function, see *Search*, *on page 22*.

> **Note:** The product search also applies to attributes and products set to *Not Visible*.

Both master products as well as variation products are covered by the search too; see *Product details – Variations*, *on page 74*.

Searching by product number is faster than searching using the *Text search* field.

The following attributes will be searched for the term entered into the *Text search* field: *Product number*, *Product name*, *Manufacturer name*, *Manufacturer product number*, *Product code*, *Short description*, *Long description*, *Keywords for search*, as well as all the attributes based on the *Text* variable type. For more information about attribute types, see *Attribute types*, *on page 23*.

In addition, the fields in which file names are saved are also searched. With this, you can also search for the names of product images used or attached files such as pdf files, video files, and so on.

Use the *Language* drop-down menu to determine which *Translation field* will be searched for language-dependent fields.

Inventory or minimum stock level searches find and list variation products and individual products. Master products are not included in the search.

7. Customers

Page: Customers

Customers are visitors to the Web site who place orders in the online shop. Customers have order-related data such as the invoice address and delivery address, tax model and tax region, invoice data, etc. There can be registered and unregistered customers. Unregistered customers must provide their customer data for each order. Registered customers have undergone the registration process, and have entered all the required customer data during that stage. They also receive user names and passwords. This makes registered customers users. See *Users*, *on page 39*

To open the detail view for a customer, click the customer number. Clicking the icon to the left next to the customer number opens a new browser window containing the customer details.

The following methods exist to add new customers to the system:

- The customer registers in the shop. You can determine the contents of the registration form. See *Registration*, *on page 40*. This creates him as a user simultaneously.
- A customer does not register, and orders without signing in. He is created as an unregistered customer.
- Use the **Create new customer** command in the customer context menu in the administration area. Enter information as described in Customer details - General, below and following.
- Customer import; see *Import and export*, *on page 90*

Caution: If you delete a customer, her orders will also be deleted.

Customer details - General

Here you enter and manage the merchant-side customer data of a customer. The user does not have access to this information.

Address

Page: Customers ›› [customer] ›› General ›› Address

Here you can edit the address information of the merchant-side customer data.

If the customer is not a registered customer, all system-generated e-mail messages related to this customer are sent to the address in the *E-mail* field.

If the merchant-side user data differs from the billing address, you will be informed by e-mail. In addition, the **Synchronise data** function will be displayed, which you can execute if necessary. See also *Data synchronisation*, *on page 89*. For more information about user data, see *Customer details - User data*, *on page 88*.

Customer account

Page: Customers ›› [customer] ›› General ›› Customer account

The customer number is recommended by the system. You can accept the number generated by the system or use your own. The number must be unique.

When a new customer is created, the customer group you set in the **Customer groups** is set as the default. See *Customer groups*, *on page 89*.

Use the tax model to decide which prices the customer is shown in the shop and how the shopping basket is calculated. See also *Tax model*, *on page 43*. The tax model can only be applied after the customer has registered in the shop.

The tax area can be assigned manually or automatically. If automatic assignment is activated, the tax area is assigned according to the country of the customer address.

Attributes

Page: Customers ›› [customer] ›› General ›› Attributes

In the *Attributes* section you can manage and edit the attribute information you entered in *Customer attributes*, *on page 90*. Click the link marked with the corresponding attribute name to jump directly to the detail page for the attribute.

Customer details - User data

Page: Customers ›› [customer] ›› User data

Users are registered customers. They can manage their user data in the shop by clicking *My Account*. This information can be viewed in the **User data** tab. You can configure which information the customer can manage in *My Account* in the registration form. See *Registration*, *on page 40*.

> Note: You can convert an unregistered customer into a user by allocating sign-in data for this customer. After saving, the address data is copied from the order to the billing address and the default delivery address.

Signing in

Page: Customers ›› [customer] ›› User data ›› Sign in

Here you manage the user access data.

A checkbox in the *Registration process completed* field means that the user has completed registration.

All system-generated e-mail messages related to this customer are sent to the address in the *E-mail* field.

> Note: The e-mail address in the *E-mail* field is used for registered customers. For non-registered customers, the e-mail address in the *E-mail* field of the *Address* section is used; see *Address*, *on page 87*.

Billing address

Page: Customers ›› [customer] ›› User data ›› Billing address

This option shows the billing address the customer entered in *My Account* in the shop. Changes you make here can be seen by the customer in *My Account*. If there are differences to the merchant-side customer data, the **Synchronise data** function is displayed. See also *Data synchronisation*, *on page 89*.

Default delivery address

Page: Customers ›› [customer] ›› User data ›› Default delivery address

This option shows the delivery address the customer entered in *My Account* and set as *Default*. Changes you make here can be seen by the customer in *My Account*.

Data synchronisation

Merchant-side customer data are customer data which you manage under **Customers** ›› **[customer]** ›› **General**, see *Customer details - General*, *on page 87*. The customers themselves can manage their information on the web site at **My Account** ›› **Manage personal data**.

The merchant-side customer data and the user data may contain differences. In this case, the **Synchronise data** function will be displayed and the system will inform you via e-mail. To enable this, the corresponding e-mail event must be activated; see *E-mail settings - Events*, *on page 58*.

Click **Synchronise data** to display the differences and select the changes to be adopted.

On the right side you can see the fields of the billing address the customer has entered in *My Account* in the shop. On the left side you can see the relevant fields in the merchant-side customer data.

Fields which contain differing information are marked blue. Click [>>] to import the merchant-side customer data into the billing address. Click [<<] to import the invoice address information into the merchant-side customer data.

Save your entries by clicking **Save**.

Customer details - Orders

Page: Customers ›› [customer] ›› Orders

On this page, you can see the orders for the current customer. To open the page with the order details, click the order number. A general description about orders can be found in *Orders*, *on page 127*.

The following methods of creating orders for a customer exist:

- Click **Create and edit new order** in the bottom row of the table.
- The **Create new order** function is now active in the **Orders** menu.

An order will be created for the customer and you will now be in edit mode; see *Editing mode*, *on page 128*.

Customer details - Newsletter

In the table, all newsletter campaigns are listed. You can see immediately which are subscribed to by the current customer.

If you subscribe or unsubscribe this customer here, he is informed about this via e-mail.

Customer groups

Page: Customers ›› Customer groups

You can use customer groups to offer selected customers various advantages. These are, for example, customers or customer groups, specific prices or payment methods.

Here you can define and manage customer groups. The table lists all the customer groups you have created. The names are displayed in entry fields. Enter changes directly in the respective field.

Save your entries by clicking **Save**.

In the options fields of the *Default for new registration* and the *Default for ordering without registration* columns, you can set which customer group a new customer will be assigned to in each case.

Before deleting the customer group, the system checks whether any customers are still assigned to the group. If this is the case, you will receive a note stating the options available to dealing with the customer assignments.

To edit the group membership for a customer, open his customer account; see *Customer account*, *on page 87*.

Customer attributes

Page: Customers ›› Customer attributes

The standard attributes are provided by the system. You can define additional attributes to save more information about your customers.

You create and manage these additional attributes in the table. For more information about using these attributes and the standard attributes, see *Registration*, *on page 60*.

For more information about attribute types and their usage, see *Attribute types*, *on page 23*.

> *Caution:* When you delete an attribute, all the customer data saved in this attribute is also deleted.

Import and export

Page: Customers ›› Import and export

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 30*.

In the import file, the following columns are mandatory for creating new customers:

- "ID [Alias]"

If no further data is specified, the customers are created using the corresponding alias. The default settings are used for all other required data. If other columns are filled in the import file, the values are entered for the corresponding attributes.

If the customer number does not yet exist, a new customer is created. Note the following when creating a new customer:

- If no user data is entered in the import file, an unregistered customer is created.
- If user data is entered in the import file, the customer is created as a user and can sign in to the Web site. For more information about user data, see *Customer details - User data*, *on page 88*.

> Note: When a user is created, the sign-in name and the automatically generated password are sent to the customer by e-mail. The corresponding e-mail events must be activated for this to occur, however; see *E-mail settings - Events*, *on page 58*.

In the import file, you can set the default language and currency for the user in the columns *Language / country [User.LocaleID]* and *Currency [User.CurrencyID]*. These settings are effective when the new user signs in to the Web site for the first time.

In the *[BillingAddress.Country]* and *[ShippingAddress.Country]* columns, the country is not provided, instead a country code is used. The corresponding assignment is available on this web site:

http://www.iso.org/iso/country_codes/iso_3166_code_lists/english_country_names_and_code_elements.htm.

Use these codes during import in order to assign the customer to the correct country. The following codes apply to Great Britain, Spain, France, and Germany:

- GB – Great Britain
- ES – Spain
- FR - France
- DE - Germany

8. Content / Categories

In this area you generate the structure of your Web site, and edit the content of individual pages. This is where you build the page hierarchy or the category tree of your web site.

The elements used to build the structure are the pages. There are various page types that all offer various functions. See *Page types*, *on page 98* and subsequent.

In the *Preview* you can manage the structure and edit basic content directly within the page view. See *Preview*, *below*.

In the *Datasheet view*, you can edit the rest of the data about the page. See *Datasheet view*, *on page 95*.

Use the *Change view* function to switch between the edit modes.

Read about how to create a new page in *Creating new pages*, *on page 97*.

You can import and export existing structures. See *Import and export*, *on page 104*.

Preview

Page: Content / categories ›› Preview

This area allows you to generate and edit the structure of your Web site, and to edit the text directly in the page view.

The page is divided into the following three areas:

- Multifunction bar in the upper area; see *Multifunction bar and content*, *on page 94*
- Page browser on left
- Page preview on right

Page browser

The left part of the page shows the page browser. It shows the structure of your Web site. You can use it to create, move, and delete the various pages. You can use these elements to construct your site structure as you wish. The icon next to the ID indicates the status. A coloured icon means *visible*, while a grey icon means *not visible*.

The functions to edit the structure are in the commands function group of the multifunction bar. See Commands *function group*, *on page 94.*

Page preview

The right side of the page shows a page preview.

Some areas of the page shown are marked by a dotted border. These are text fields or areas to upload images. These can be edited directly. Click on an these areas to edit them. There are two types of these text fields.

- *HTML text fields*When the field is activated, the multifunction bar changes and provides functions for text editing. See *Editing mode*, *on page 95*. Such fields are product descriptions, or other long texts.
- *Text-only fields*: In these fields, you can only enter plain text, with no option for formatting. These comprise product names or category names, for example. The multifunction bar never changes.

Multifunction bar and content

The multifunction bar is contained in the top area of the page with the preview area. It provides all functions that are necessary to edit the page structure and the text fields. Functions are grouped together in function groups.

The *File* function group is always available.

File function group

In this group, you can find the functions to save, undo, and repeat changes.

If you edit the page structure, the multifunction bar is shown in the page mode and offers the corresponding functions. See *Page mode*, *below*.

If you edit text fields in the preview, the multifunction bar is shown in edit mode and offers text editing functions. See *Editing mode*, *on page 95*.

Page mode

You are in the page mode if you are in the preview mode and have not activated any text. In this mode, the function groups *Commands*, *Layout* and *Language* are shown in the multifunction bar.

In this mode, you can edit the structure of your web site, create new pages, and set the visibility of the content of individual pages.

Commands function group

The *New* function corresponds to the function **New** in the submenu of **Content / Categories**. The new page is created as a subpage of the current page. The *New* function is not active if no subpages can be created for the current page.

The visibility status of the page is indicated by the icon in front of the page name. If you do not make the home page visible, it means that you close the web site.

After deleting, the page is deleted from the view immediately. No confirmation is shown. If you have not yet saved, you can restore the page. Click on *Undo* to do so or open the complete page again.

Use the *Move page* function to move the current page within the structure. This allows you to define the sequence of the pages and to put a page into various hierarchical levels. Only functions are active that are possible on the current place on the page.

> *Caution:* The result of commands (for example, visible or delete) is shown in the page browser but is not yet save. Click the save symbol in order to save the current status.

Layout function group

This group contains functions allowing you to arrange and display the content on the individual pages. Various layout options are available depending on the current page type.

The function group is only shown if the display can be changed for the current page.

The icons indicate the currently configured options. Click the arrow to view all options. If you move the mouse over an image, a small notice is shown. This describes what is shown in which order.

This function group corresponds to the **Layout** tab in the details of a page. See *Layout*, *on page 97*.

Language function group

Here you can configure the language of the content that you want to edit for the individual pages. When you select a language, the current page is displayed in the corresponding language and you can edit the texts in this language.

Editing mode

You are in the editing mode if you have clicked a text field in the preview. In this mode, the function groups for editing text are shown on the multifunction bar.

These functions correspond to the functions of the WYSIWYG editor, see *WYSIWYG Editor*, *on page 26*.

You can enter HTML code for the text fields as a special function. To do so, click **Edit HTML** in the multi-function bar. A new window opens containing the text. Insert your HTML code here. Save your entries by clicking **Apply**. The page preview shows the text with the formatting from the HTML code applied.

> *Caution:* Your changes are visible immediately upon leaving the field, but are not automatically saved. Click the save symbol in order to save the current status.

Datasheet view

Page: Content / Categories ›› Datasheet view

In a datasheet view, you can edit all the available data for the current page. Select this view to enter and edit data that cannot be edited in the preview.

The parameters are grouped into tabs, which are described below. The specific descriptions of each page type refer to any exceptions.

The following tabs are always available:

- General; see *General* , *below*
- Pages; see *Pages*, *on page 96*
- Products; see *Products*, *on page 96*
- Images; see *Images*, *on page 97*
- Layout; see *Layout*, *on page 97*

General

Page: Content / Categories ›› Datasheet view ›› Pages ›› [page] ›› General

There are general settings for each page type. These are settings such as page title, descriptive texts, visibility, or also access control.

The option *Visible in page element* is a special form of the general visibility. This page is set as visible or not visible only in the corresponding page element. It remains visible generally, however. This means, for example, that if you have a large catalogue structure, you can elect to just display the most important categories for navigation purposes. All the categories are displayed in the category list in the display area, and the user can access them from here. If the page is not visible in general, the option cannot be used.

You can assign access permissions for some pages. Use the *Allow display for* drop-down menu to show who can view this page. The corresponding page can only be called up by the configured user group.

This setting is valid for pages on which visitors can edit entries (forum, blog, etc.) and allows you to limit creation of such entries. To do so, use the *Adding allowed for* drop-down menu.

The content of the *Title* field is shown as a page heading, in the title line of your browser, and in the page browser in the preview display.

The content of the *Caption for page element* field is shown as a link in the page element in which the categories are shown for navigational purposes. For example, *Tree view of the pages as a box* or *List of the pages of the top level*. If you leave the field empty, the text from the *Title* field will also be used as the caption for the page element. If the title is very long, enter a shorter more poignant term so that the name of the link is not too long. This text is shown in the navigation history (breadcrumb).

The field *Keywords for search* is mainly used by the search that the customers perform in your shop that you place as a page element on your web site. Enter alternative descriptions or spellings under which the product should be able to be found which are not in the page texts, but under which the specific page should be able to be found.

The individual page types contain up to four fields for the extended description in addition to the description. The description is shown in the category lists.

The texts from the extended descriptions are displayed on the page itself or in the details of the corresponding category. You can set which texts are displayed using the layout options for the page. See *Layout*, *on page 97* for more details.

For some page types there are additional, special settings. These are explained in the descriptions of the specific page types.

Pages

Page: Content / Categories » Datasheet view » Pages » [page] » Pages

All structural elements which are located hierarchically beneath the current page are referred to as subpages of this page. The term *Subcategory* is also used.

The table lists all the sub pages that have been created for the current page. The icon next to the ID displays type and status.

To create a new page, follow the steps described in *Adding records*, *on page 21*.

Use the batch command *Move to...* to move pages to another place in the structure tree. When you move categories, all associated and subordinate elements such as subcategories and products are moved as well. These assignments remain in place.

> ***Caution:*** If you delete a page, all subpages and their contents are deleted as well. The products assigned are not deleted, just the page assignments.

> Note: If you open the Web page view when in a page, you will see the page even if it has been set to *Not visible*. If you switch to the next higher page level, this page will no longer be displayed as a sub page as long as the status is set to *Not visible*. Take account of the page cache settings; see *Page cache*, *on page 37*.

Products

Page: Content / Categories » Datasheet view » Pages » [page] » Products

The table lists all the products which are assigned to the current page. The function and meaning of the icons is the same as in the general product list.

The following methods exist to assign products to the current category:

- Adding new entries, as described in *Adding records*, *on page 21*. Save your entries by clicking **Save**.
- Create a new product directly via the **Product's** sub menu. Click the **New** link and proceed as described in *Creating a new product*, *on page 67*. The product is assigned to the category on completion.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using sorting keys*, *on page 22*.

Use the batch commands to sort the product list according to various criteria, for example, according to ascending prices. This sorting is not dynamic. That means that if you change prices for the products after sorting, the list is not sorted again automatically. The sequence stays the same as before the price change was made. If you would like to sort the list again with ascending prices, you must perform the corresponding batch command again.

Images

Page: Content / Categories » Datasheet view » Pages » [page] » Images

You can manage up to four images for each page. The *List view* image is used for page lists. A small image is displayed for each page here, alongside the title and description. The other images are displayed on the page itself in the category details along with any existing long description fields. You can specify which image is displayed using the layout options. See *Layout*, *below*.

You must upload each image individually using the **Upload file** button. See also *Uploading images*, *on page 28*.

Layout

Page: Content / Categories » Datasheet view » Pages » [page] » Layout

The table lists all the options for displaying the content of the corresponding page in the Web site. If you move the mouse over an image, a small notice is shown. This describes what is shown in which order.

The selected option has two functions. The first is to set which content should be shown on the page, such as only text or subpages together with products. In addition, the sequence of content is set, for example, first products and then subpages or the other way around.

Depending upon the page type, you have up to four text fields available and can upload up to four images. See *General* , *on page 95*. With the *Text* option, you set which of the texts and images are shown in which combination. If the icons display indicate more text fields or image than are currently available on the page, these are created and can then be edited by you.

Use *Subpages* to set whether all subpages should be shown on the subpage or only the content pages.

Use *Products* to see how the product list on the page should look.

> Note: If you arrange the products or category pages in more than one column, these pages are displayed first from left to right and so on down the page.

Creating new pages

There are various ways to create a new page, depending upon the context in which you find yourself. In the following process, we assume that a structure is already existing. This is also the situation after running through the setup assistant.

Proceed as follows:

1. Open the **Preview** in the **Content / Categories** menu.

2. Select a page in the page browser under which the new page should be created.
3. Click **New** on the multifunction bar.
4. Enter a name and select the corresponding page type. Leave the *Visible* option on *No*.
5. Click **Insert**.
6. Check whether the page was inserted in the correct place in the structure. If not, use the functions under *Move page* in the multifunction bar to move the page to the correct place.
7. Click on the text fields on the preview and enter the corresponding content.
8. Select the correct layout options for the page. Test multiple variation until you have found the optimal page display.
9. Click the link to the web page preview in the administrator navigation. Look at the page again on the web site.
10. Click **Visibility** on the multifunction bar.
11. Select the *Visibility* option to *yes* and click **Apply**.

Now the new page is shown on your web site.

If you also want to offer the page in additional languages, switch the language using the selection box. This way you can see what language-dependent data you still have to enter.

If necessary, enter additional data in the datasheet view. Click **Datasheet view** on the multifunction bar and enter all required data in the tabs provided.

For more about the basics of working with the various views, see *Preview*, *on page 93*, *Datasheet view*, *on page 95* and *Multifunction bar and content*, *on page 94*.

Page types

Page types are the foundation for the various types of pages from which you can build your web site.

The page type determined the type of content and the functionality that is shown in the content area of the respective page. See *Web site structure*, *on page 114*.

For the page type *Category*, for example, these are descriptive texts, heading, and images for the category as well as the product list and the list of subcategories. The page type *Customer information* contains text with corresponding information for the visitors of your web site.

In addition, the page types differentiate by the type and amount of data that are saved in the details of the respective pages.

When creating a page, the corresponding type is selected and determines the following process during creating of the page.

You can access the page types in the page browser and in the datasheet view of a page. See *Page browser*, *on page 93* and *Pages*, *on page 96*.

The usage, function, and specialities of the various page types are described in the following chapters.

Home page

Page: Content / Categories ›› Pages - Datasheet view

The home page is the main page. It is the root of your site tree structure. All other pages are subpages of the home page.

It is the start page of your web site.

The home page cannot be deleted. You cannot change the ID for this page. The home page only exists once.

Most setting for the home page match those of all pages. See *Datasheet view*, *on page 95*. The following details should be noted for the home page.

General

In the *Summary for search engines* field, enter the text that is shown in the results list for search engines. Keep the text short but powerful in order to interest your customers for your page.

Intro

Page: Content / Categories » Datasheet view » Intro

You can define an introduction (intro) to your Web site. This is an animated introduction that is shown before the home page is displayed. The site intro runs for a limited duration or a link is shown that allows the user to skip the intro.

Templates for the intro can be found in the **Select template for intro** section.

To set up an intro, proceed as follows:

1. Select a template from the **Select template for intro** section.
2. Click **Apply**.
3. Change the parameters according to your needs.
4. Click **Update** to display the intro page with your current settings.
5. Use the option *Display intro before home page?* to *yes*.
6. Save your entries by clicking **Save**.

You can create your own intro using the *Own intro* template. Enter the required code into the text field. Some example elements are listed in the *Code examples* area. Click the name to copy the associated sample code into the text field. Save your entries by clicking **Save**.

Page / Category

Page/category is the page type for the construction of a hierarchical catalogue structure. You can assign subcategories and products to it. You can enter a separate layout for each category.

In the page preview you can edit the category texts and texts of the associated products.

Most setting for the categories match those of all pages. See *Datasheet view*, *on page 95*.

Content page

Content page is the page type that you use to create general content as articles to display on your web site.

Most setting for content pages match those of all pages. See *Datasheet view*, *on page 95*. The following details should be noted for content pages:

You can put the date in the *Date* field. This will be shown together with the title.

In the **Texts** section, you can add an attachment to the article. Either enter the name of the file with its path directly in the *Attachment* field, or click **Browse** to search for the file. At the end of the article, a link to the attachment is displayed on the website. In the *Attachment label* field, enter the text for the link.

Link

Link is the page type that you use to create links to external or internal pages of your web site.

The link is displayed in page elements such as the category tree or in category lists.

Most setting for the link match those of all pages. See *Datasheet view*, *on page 95*. The following details should be noted for the link:

With the *New window* option, you set whether the link opens in a new window or in the same browser window.

In the *Web site* field, enter the target address for the link.

Promotional products

Promotional products is a page type that you can use to offer specials on selected products. Use it to present special offers, promotions, or new products to your customers. The *Promotional products* type is a special category that can only be used once.

Most setting for the promotional products match those of all pages. See *Datasheet view*, *on page 95*.

There are two special page elements for displaying promotional products in the shop: *Promotional products as box* and *Link to the promotional products*. Place these on the web site in the **Layout** area. For more information, see *Page elements and navigation*, *on page 121*.

Contact information

Contact information is the page type that you use to display your company information.

The contact information is an important part of your Web site and may be a legal requirement. It is also called the vendor information. Contact information is obligatory.

The content of the contact information is determined by the respective countries. In Germany, the requirements for the contact information are contained in the tele-media laws. The following is required:

- Name and address of the vendor
- Communication data
- Legal registration number and registry location
- VAT ID or business tax ID

Depending upon the type of corporation, other information can be required. Get information about the current legal requirements.

It must be possible to open the contact information page from every page in the Web site. A corresponding page element exists to do this. For more information, see *Page elements and navigation*, *on page 121*.

Terms and Conditions

Terms and conditions is a page type that you use to display your business and contractual conditions on your web site.

The terms and conditions are a component of a shop, and strict regulations also apply here. The content and access is dictated by laws of specific countries.

In Germany, for example, the Terms and Conditions have been legally regulated since 2002 (BGB paragraph 305 ff.).

> *Caution:* You should review the default set of Terms and Conditions and adapt it, if necessary, to the current requirements of your Web site or replace it with your own set of Terms and Conditions.

The Terms and Conditions must be readily available to the customer. A corresponding page element exists to do this. For more information, see *Page elements and navigation*, *on page 121*.

> Note: You can set up the order process so that the customer must confirm the privacy policy before the purchase can be completed; see *Shopping basket settings*, *on page 59*.

The customer can either print out the terms and conditions or save them to a file, as required.

Closely connected to the Terms and Conditions is the customer information, which supplements the Terms and Conditions and explains the business requirements in greater detail as well as providing additional information. For more details, see *Customer information*, *below*.

Customer information

Terms and conditions is a page type that you use to display your business and contractual conditions on your web site.

Customer information is a supplement to the Terms and Conditions and is meant to notify customers of the conditions of use, as well as the processes and procedures on the Web site. You should also include information about your shipping costs here. As opposed to the Terms and Conditions, customer information is meant to be more informational and explanatory in nature. For more information about Terms and Conditions, see *Terms and Conditions*, *on page 100*.

The customer information should be readily available to the customer. A corresponding page element exists to do this. For more information, see *Page elements and navigation*, *on page 121*.

> *Caution:* You should review the default customer information and adapt it, if necessary, to the current requirements of your Web site or replace it with your own customer information.

Privacy policy

Privacy policy is the page type that you use to explain how you use personal information on your web site.

Since you receive and record personal information from your customers, you must inform your customers of the ways this information is being used and saved. This is a legal requirement in many countries. You can use the *Privacy policy* to display the relevant notification to your customer.

The privacy policy must be readily available to the customer. A corresponding page element exists to do this. For more information, see *Page elements and navigation*, *on page 121*.

You can read about how to set up the agreement for your customer under *Signing in*, *on page 40*.

> *Caution:* You should review the default privacy policy and adapt it, if necessary, to the current requirements of your Web site or replace it with your own privacy policy.

Business hours

Business hours is the page type that shows your visitors the times during which you offer your services.

You set the times themselves in the general settings for your web site. See *Business hours*, *on page 39*.

For the **Layout** of the business hours on the web site you can select between a table-based or graphical view.

Site map

Sitemap is the page type that provides your visitors with a general overview of the structure of your Web site. At a glance, visitors can see what pages your Web site contains, and can find their place. Depending on the layout format, up to four levels of the Web site structure can be displayed.

Part of the general settings for the site map match the general settings for all pages. See *General* , *on page 95*.

For the **Layout** of the site map on the web site you can select between a block view and a tree view.

Forum

Forum is the page type to provide your visitors with an opportunity to discuss various topics on your Web site. Users can start discussions on a given topic, as well as write responses to the various topics. Your visitors can also subscribe to the posts as an RSS feed.

You can restrict who can read the forum and who is permitted to submit topics or posts. Visitors with permission to do so can report suspicious content using a special function. Such entries are marked as spam in the Administration area. You can then block these posts from being displayed.

You can create new topics in the page preview.

Part of the general settings for the site map match the general settings for all pages. See *General* , *on page 95*.

For the **Layout** of the forums on the web site you can select between a list view and a tree view.

Topics

The table lists all the topics in this forum. You can also put in new topics here. Proceed as described in *Adding records*, *on page 21*.

If you would like to read more about the topic, click the ID. See *Topics – Details, below*.

Topics – Details

In the details of a topic, you can rename it and set whether more posts can be made about this topic.

The table lists all the posts for the topic. As well as the user name, the IP address of the computer from which the post was submitted is also displayed. If visitors report that a post is suspected of being spam, the post is marked with a warning icon. In case the SPAM report is invalid, you can remove it. To do so, use the batch command *Delete Suspected spam marker*.

You can also create your own posts about the topic here. Proceed in this as described in *Adding records*, *on page 21*.

Blog

Blog is the page type that shows your visitors new information in a journal format.

The visitors can leave comments on the blog entries and subscribe to the entries as an RSS feed.

You can restrict who can read the blog and who is permitted to submit comments for the entries. Visitors with permission to do so can report suspicious content using a special function. Such entries are marked as spam in the Administration area. You can then block these posts from being displayed.

You can create new topics in the page preview.

Posts

The table lists all posts of the blog. Here you can also create new posts. For more information, see *Adding records*, *on page 21*.

Posts – Details

The post details allow you to edit the general settings for the blog post and the list of associated comments.

Here is where you set the post to visible and allow comments. Blocking comments here is independent of the permission settings for the blog.

Comments

The table lists all the comments for the blog entry. As well as the user name, the IP address of the computer from which the post was submitted is also displayed. If visitors report that a post is suspected of being spam, the post is marked with a warning icon. In case the SPAM report is invalid, you can remove it. To do so, use the batch command *Delete Suspected spam marker*.

You can also enter your own comments about the current post here.

Guestbook

Guestbook is the page type to provide your visitors with an opportunity to provide text comments on your web site publicly.

In general, visitors to the Web site will use this option to leave their opinions, notes or criticism of the Web site. Your visitors can also subscribe to the posts as an RSS feed.

You can restrict who can write or read guestbook entries. Visitors with permission to do so can report suspicious content using a special function. Such entries are marked as spam in the Administration area. You can then block these entries from being displayed.

Entries

The table lists all the entries in the guestbook. As well as the username, the IP address of the computer from which the entry was submitted is also displayed. If visitors report that a post is suspected of being spam, the post is marked with a warning icon. In case the SPAM report is invalid, you can remove it. To do so, use the batch command *Delete Suspected spam marker*.

You can also create your own entries here, for more information, see *Adding records*, *on page 21*.

Image gallery

Image gallery is the page type that you use to display photos on your web site.

You can show all images as a list with the slideshow. The viewer can control the slideshow In addition, you can show the images with the cover-flow effect. The cover flow is a display in which all images are shown as a running horizontal list with the current image in the foreground.

The page preview allows you to upload images and edit text elements. Edit the other settings in the datasheet view.

The following details should be noted for the image gallery:

- The viewer can control the slideshow Special control elements are displayed for this purpose. Under the *Scrollbars* option, you stipulate whether large or small control elements are displayed.

- The directory under *Directory* is the directory under which the images are saved in the file manager. See *File management*, *on page 30*

Images

In the table, you can see all the photos that you have uploaded for this image gallery.

To see a magnified view, click an image. You can enter additional data for each image. This data is displayed along with the image on the Web site. To enter this information for other languages, select the corresponding language from the drop-down menu above the table.

You can change the name of the file. To do so, click on the symbol in the name of the corresponding file.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using sorting keys*, *on page 22*.

To upload new images follow the instructions found in *Uploading images*, *on page 28*.

> *Caution:* The images for the photo gallery can only be added using the **Upload files** function on the **Images** tab. You cannot use the file manager for this. The same thing applies to editing the file names.

Image search

You can search for images both on the Web site and in the Administration area. To enable proper searching, you should define search terms and other content for the images. Searches can be conducted using this content.

You can add the following content for each image:

- Keywords
  Individual keywords under which the images can be found. Multiple terms must be separated by commas.
- Image location
- Description

The search form in the administration contains the fields *Keywords* and *Text*. When searching, the terms in the *Keywords* field are compared with the content of the *Keywords* attribute. The terms entered in the *Text* search field are compared with the content of the fields *Image location* and *Description*.

Terms in more than one field are linked using the *AND* operator. This means that if you enter a keyword and a text in the search form, an image must be assigned to the keyword and the text in order to be located.

The web site only has one search field. The search term entered here is searched for in all three previously mentioned fields.

Import and export

Page: Content / category ›› Import and export

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 30*. In relation to contents and categories, the following import and export types exist:

- Import/export of Pages and categories, see *Import/Export of Content/Categories/Pages*, *on page 105*
- Import/export of category-product assignments; see *Import/export of category/product assignments*, *on page 105*

> **Note:** Some functions in the application will open in new browser windows. For this reason, your browser must allow pop-up windows to open. Otherwise, certain functions cannot be used.

Import/Export of Content/Categories/Pages

The *Categories Import/Export* function allows you to import or export the catalogue structure of your Web site. This refers to all of the categories and pages and their properties, and how they are arranged in the catalogue structure.

When creating new categories via the import file the following columns are mandatory:

- "Type [Class]"
- "Parent Object [Parent]"
- "ID [Alias]"

If no further data is specified, the categories are created using the corresponding alias and specified type and are sorted accordingly into the structure. The default settings are used for all other required data.

If there is no entry in the *Parent Object [Parent]* column, the corresponding elements are placed directly under the Home page.

Import/export of category/product assignments

When category-product assignments are imported or exported, the assignment of products to categories is also swapped in or swapped out. The assignment of products to categories is defined here.

In the import file, all the columns from the export file are mandatory.

> ***Caution:*** In order to perform a category/product assignment import, the products used and a corresponding catalogue structure must be available. If you make this available per import, you need to first perform the *product import* and the *category import*, and then after this, the *category-product assignment import*.

9. Booking system

The booking system allows you to offer services that your customers can reserve through the Web site. This could include tool rentals, table reservations in a restaurant, or booking a hairdresser appointment. The services are referred to as “Services”.

To offer these services, you must perform the basic settings and create the services. There are two assistants to help you do this. The booking system setup assistant helps you with the basic settings. The services setup assistant helps you to create services.

You work with the booking system as follows:

1. Setting up the booking system

   Start the booking system setup assistant and perform all required steps.

2. Creating services

   Create services. Start the services setup assistant and perform all required steps.

3. Creating bookings

   Bookings can be made by your customers using the Web site, or created by you in the Administration area. This is done by selecting the corresponding service and entering the required data. Finally, the booking is sent or saved. The bookings are entered in the booking overview for the specific service.

4. Control and confirmation

   In the Administration area, you can display the booking either using the calendar function of a service or using the search tool. If the manual confirmation option is active, you must check and confirm each booking individually in order for the confirmation e-mail to be sent to the customer. If required you can change the booking time in the booking details at any time, or also cancel the booking. For more information, see *Booking details*, *on page 111*.

Once that is done, the bookings are entered into the calendar and confirmed with the customer.

The booking system setup assistant can be executed again after the first usage to change settings.

The services setup assistant is used to set up services. To change the details for the service, open the details of the corresponding service from the table. See also *Service details*, *on page 108*.

Services are managed in a similar way to products. After editing the general properties with prices and descriptions, you can assign images and define category assignments.

The bookings for each service are listed in a special tab; see *Bookings*, *on page 111*.

Services

Page: Booking system » Services

Services are offerings such as trainings, reservations, or rentals which your customers can book.

The table lists all the services which you have created. To open the details of a service, click the name. Click the icon to the left of the name to open a new browser window with the service details. See also *Service details*, *on page 108*.

The following methods of creating services exist:

- Run the assistant to create a service
- Duplicate an existing service
- Enter the new service in the last row of the table which lists all services
- Open the **Create new service** function from the **Booking system** menu

Service details

Page: Booking system ›› Services ›› [Service] ›› General

The general properties in **Name / Price**, **Description** and **User-defined attributes** are mostly the same as those of products. For the relevant settings, see *Product details – General , on page 71*.

In the **Duration / Time Limits** section, you can set the general conditions for this service. You can define, for example, how long the service runs, whether customers can set the duration of the service, in which intervals the service can be booked and so on.

The assignment and management of images, categories, and cross-selling matches the process with products. Read about this in *Product details – Images, on page 72*, *Product details – Categories, on page 73* and *Product details – Cross-selling, on page 78*.

Service details - Customer options

Page: Booking system ›› Services ›› [Service] ›› Customer options

You can create options for a service. Using these options you can allow your customers to make certain selections for the service. For example, in the case of a table reservation you could offer the type of table decoration as a selection.

To create such options you must create a corresponding attribute for the product type to which the service is assigned. Proceed as follows:

1. Click **Edit product type**. This takes you to the page containing the attributes for the displayed product types.

2. Enter the ID and name of the attribute (such as *Table decorations*) and select the attribute type *Customer options*. Save your entries by clicking **Save**.

3. Click the name of the new attribute to edit the details. Enter the general details.

4. Click the **Value selection** tab to enter the selection values. (For example, *Birthday decorations*, *Candlelight dinner*, ...). Save your entries by clicking **Save**.

5. Switch to the page with the options for the corresponding service. Here you will see the attribute values with check boxes. Highlight the options that you want to make available to the customers on the Web site.

6. Save your entries by clicking **Save**.

7. The options are displayed for the customer in the form of a drop-down menu when reserving the service.

To add or remove options click **Add or remove values**. This takes you back to the page with the attributes, which you can edit accordingly.

For more on product types and attributes, see *Product type details, on page 80*!

Bookings

Page: Booking system ›› *Services* ›› *[Service]* ›› *Bookings*

Here you will see all the bookings that have been reserved for a service in a calendar overview format.

Overview

You can use the calendar to access all the bookings for the service. Use the bar containing the day numbers to choose the corresponding day in the month that is displayed. Select the month using the left and right arrows next to the month indicator.

The individual icons in the days bar have the following meanings:

Table 9: Key to calendar icons

Icon	Description
Day number with highlighted background	Currently selected day; The bookings list is displayed for this day.
Day number with border	Current date
Day number displayed in bold	Day has at least one booking
Day number grey	No bookings can be created for this day.

If you move the mouse over the days bar, an overview of the bookings for the corresponding day is displayed in a small window.

If you click a specific date, the table containing the bookings for this day is displayed and you can edit the bookings for this day. The number of columns that are displayed is governed by what was entered for this service in the stock level.

The individual icons in the bookings list have the following meanings:

Table 10: Key to bookings list

Icon	Description
	Released reservation period can be blocked for reservations
	Blocked reservation period can be released for reservations
 Delete	Delete selected bookings; This function appears when you move the mouse over the booking.

To configure a new booking, the following options are available:

- Click a time period in the day list and enter the details; see *Booking details*, *on page 111*.
- Click the **New Booking** link and enter the details; see *Booking details*, *on page 111*
- Create a booking on the web site.

To call up the details for an booking, click the corresponding entry in the bookings list.

Set allowed booking times

Here you can enter the periods during which the current service may be reserved. The business hours are entered as the default setting; see *Business hours*, *on page 39*! You can overwrite these times here. These times then only apply for this service.

Save your entries by clicking **Save**.

Batch clearance

You can use the batch release function to configure simple releases/blocks for specific periods of time. Such exceptions could be special opening hours, closure for vacation, etc. During these periods, the service is not available as usual. However, in order not to have to change the general hours of business for this service for this limited period, you can enter the exception period here.

The various fields have the following meanings:

Table 11: Fields for batch release

Field name	Description	Field type	Example
Start date	Date of the first day from which the exception should apply	Date field	02/12/2010
End date	Date of the last day to which the exception should apply	Option button + date field	04/12/2010
Multiple occurrence	Number of occasions that the modified times may be used; This is evaluated in conjunction with the field *Repetition*.	Option button + entry field, numeric	5
Repetition	The time interval between repetitions of the exception periods; Repeat as many times during the repetition period as specified in the *Repeated occurrence* field	Option button	
Mornings from/to	Differing business hours in the morning	Entry field, alphanumeric	09:00 12:00
Afternoons from/to	Differing business hours in the afternoon	Entry field, alphanumeric	13:00 18:00

Closing during lunch is not necessarily required.

Save your entries by clicking **Save**.

> Note: The exception periods for the service are entered in the calendar for the number of weeks specified in Repetition. The maximum number is limited by the system to 30 repetitions.

Examples for batch approval:

- Temporary closure due to holiday;
  - For the start date, enter the first day of vacation.
  - Enter the end date for the holiday
  - Repetition: daily
  - Leave fields for opening hours empty (not open)
- Shut Fridays in the coming month:

- For the start date, enter the date of the Friday on which the rule commences.
- Number: 4
- Repetition: weekly
- Enter morning opening hours; leave afternoon hours empty

Bookings

Page: Booking system ›› Bookings

In the table, you can see all bookings that have been performed. To call up the details for a booking, click the link in the *Booking* column.

Use the batch commands to confirm or cancel multiple bookings at once. An e-mail about this is sent to the corresponding contact person.

Booking details

Page: Booking system ›› Bookings ›› [booking]

This shows an overview of all the data for the corresponding booking. You can change the data if you need to, or move, or cancel the booking.

To confirm the booking manually, highlight the *Booking confirmed* check box. After saving, a corresponding e-mail is sent to the customer.

To cancel the booking, highlight the *Booking cancelled* check box. Upon saving, a corresponding e-mail is sent to the customer.

Before the e-mail message can be sent, the corresponding e-mail event must be activated. See *E-mail settings - Events*, *on page 58*.

Save your entries by clicking **Save**.

10. Design

In the **Design** menu, you can find all tools to edit the design and layout of your web site. The possibilities range from the selection of entire templates up to the colour definition of texts and backgrounds of different areas.

You can find templates under **Templates** and you can manage multiple templates at the same time under **Own styles**. For more information, see *Templates, on page 124* and *Own styles*, *on page 123*.

In the **Quick design** section, you have several functions that you can use to make fundamental design changes. See *Quick design*, *on page 125*.

In *Advanced design*, functions are available to help you adapt the layout and design of your entire Web site as well as individual areas to your needs.

Before you begin to edit your design, we recommend you read the chapter *Design basics* and *Edit design*. See also *Design basics*, *below* and *Editing the design*, *on page 116*.

Design basics

In order to design your web site in all possible ways, open **Advanced design**. You edit the design and layout in a WYSIWYG mode, Changes are shown immediately.

The working area of the browser is split in two. In the upper section you can see the multifunction bar. This displays the available functions. For more information, see *Multifunction bar and content*, *on page 117*.

In the lower section you can see the page preview. You can edit the design and layout directly there. The page preview shows you the current Web page in the design and layout specified by the selected style; see *Own styles*, *on page 123*.

The web site is split into the following functional areas; see *Figure 8*.

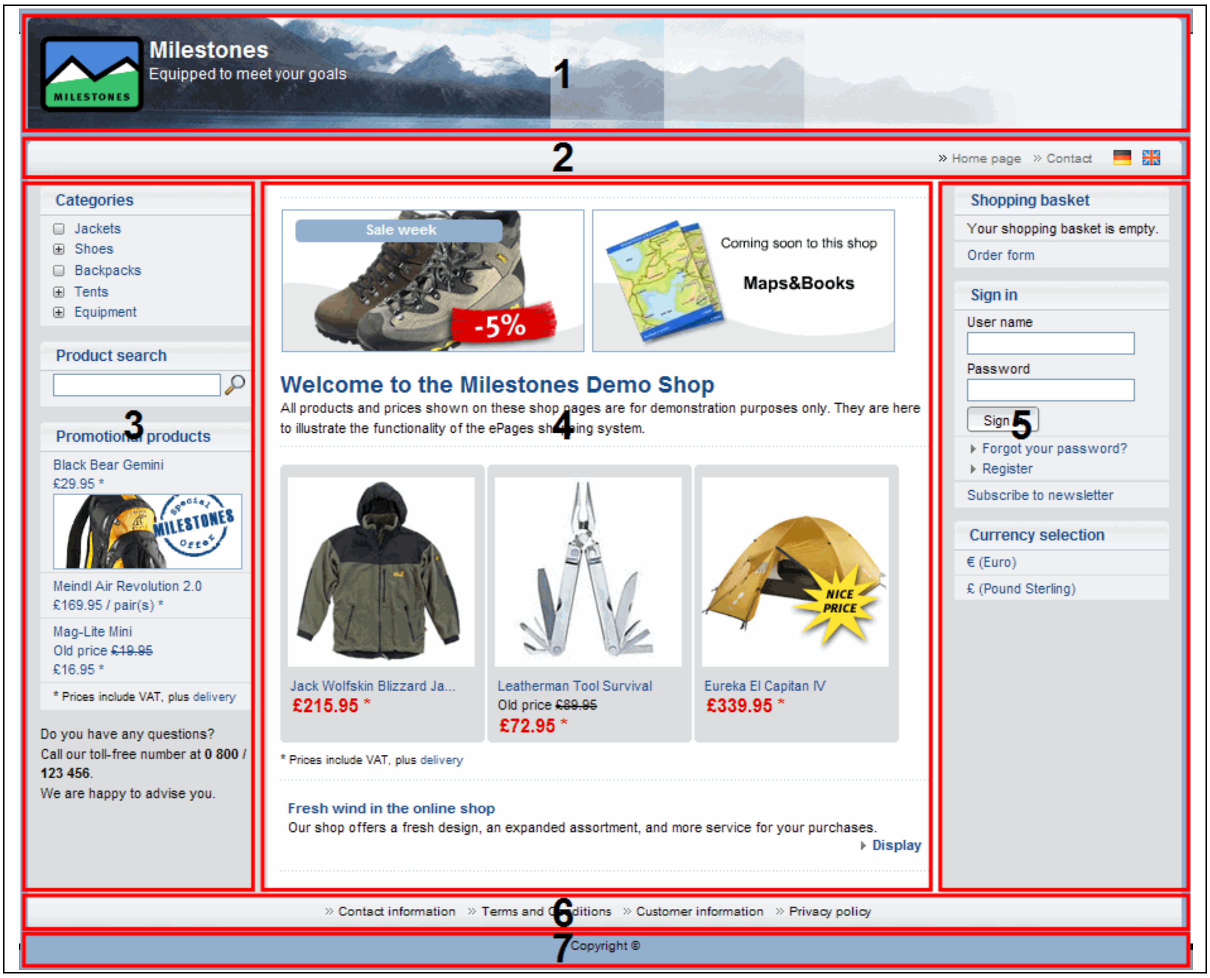

Figure 8: Web site structure

Area 1:	*Header*
Area 2:	*Top*
Area 3:	*Left*
Area 4:	*Content area*
Area 5:	*Right*
Area 6:	*Bottom*
Area 7:	*Footer*

In addition there is the surrounding working area of the browser on which the Web site is displayed. See *Page view in browser, on page 117*.

If you want to edit an area, click the mouse in the corresponding location. This activates that area. It is highlighted by a border and the multifunction bar displays the functions that can be carried out in this area.

In terms of editing and configuration options, the areas of the site can be categorised into vertical and horizontal areas as well as the content area:

Horizontal areas: *Header*, *Top*, *Bottom*, *Footer*
The horizontal areas mostly extend over the entire width of the Web site. They are wider than they are high. They mostly contain links and narrow display elements. Typical page elements for horizontal areas include:
- Logo
- Name of the Web site
- Link to the Home page, Contact information, Terms and Conditions, Customer information, Categories, Shopping basket
- Flags for the country selection

Vertical areas: l*eft*, *right*
The vertical areas are mostly located between horizontal areas and lie parallel to the content area. They are higher than they are wide. They mostly contain boxes with texts, lists, links or entry fields. Typical page elements for vertical areas are, among others:
- List of main categories
- Signing in
- Compact shopping basket view, Shopping basket status
- Product search
- Promotional products

Content area: Whereas the other areas contain mainly functional elements such as menus and links, the content area contains the content of the pages that you have created under **Content / Categories**.
The size of the content area is determined by the height and width information of the other areas, as well as the padding. The "rest" of the browser window is left for the contents.

The parameters for the individual areas create the complete design when they are combined. Some parameters influence each other or are interdependent. These side-effects must be considered. The following information should be helpful:

- In areas, background images have more priority than background colours. This means that if you load a background image and also set a background colour, the background image will cover the colour.
- All sizes and dimensions for the examples are shown in pixels (px). You can also use any other sizes which can be used in style sheets, for example percent (%). For more information on the possible settings and how to use them, please consult the corresponding specialist literature or Web sites, such as *http://www.selfhtml.org* (only partially in English).
- Test out the various settings. Remember that you can use the Undo function at any time to restore the initial state. Alternatively, make a copy of the current style and test out the various options on the copy. You can do this in the table of your own styles by using the **Create backup copy** function. See *Own styles*, *on page 123* for more information about this. Once you have created the desired design there, activate the style for your customers.

Notes on background images

Matching templates are loaded for the background images in each design template. You can replace these with your own images. If you delete your own images, the template is reloaded automatically. If you do not want a background image at all, you must delete the template image too. To do this, click the **Delete template** link. When the template has been deleted, the name of this link changes to **Restore template**. Click this link to restore the default template for the background image without having to search for file names.

> Note: If you set both a background colour and a background image, the background image will always be on top of the background colour. Therefore, if you want to display the colour, delete the background image. If the background is to be filled completely, the image must be resized to fit the area or you can activate *Tile image*.

Tile image

Background images can either be displayed as a single image or repeatedly displayed so that the background of the entire page is filled. This arranges copies of the image next to and below each other until they fit the whole page.

Editing the design

In this chapter you will learn the basics of editing the design of your Web site. The information is provided only as a recommendation, since the procedures for designing Web pages can differ greatly.

First you should read the chapter *Design basics*, *on page 113*. This will provide you with the required basic knowledge.

To edit the design of your Web site, click the menu item **Design**. Depending on the scope and type of design changes, you can either start the **Quick design** function or the **Advanced design** function. For more on working with the Quick design function, see *Quick design*, *on page 125*.

> Note: Before you make any changes to the current design, we recommend that you save a copy of the design. You can do this in the table of your own styles by using the **Create backup copy** function. This ensures that you can always revert to the initial state. See also *Own styles*, on *on page 123*.

After selecting the advanced design, your Web site will be displayed in the browser using the design that is specified by the current template.

Initially the background area of the browser is active. You can see that from the red border surrounding the display area in the browser window. This area is where you configure the general way in which your Web site is displayed in the browser. See *Page view in browser*, *on page 117*.

The multifunction bar at the top of the browser displays the corresponding functions that are available. For more information, see *Multifunction bar and content*, *on page 117*.

Therefore, you should first configure the general display settings for your Web site in the browser. Make any changes as necessary to the page layout by hiding and displaying different page areas.

To select the different Web site areas, move the mouse over the Web site. Areas available for selection are highlighted. To select an area for editing, click on it. A red border is then displayed around that area.

You must now check whether all required functions are displayed on the Web site. These functions include: Shopping basket, sign-in box, catalogue tree or links to specific pages. These functions are provided by page elements. You can modify the arrangement of the page elements within the individual areas, and if necessary create new elements. For more information, see *Page elements and navigation*, *on page 121*.

Start editing the design now. Proceed through each area at a time, using the functions provided by the multifunction bar for the currently active area.

Upload images, play around with colours and fonts, and try out as many of the options as you want. Use the *Undo* function to restore the condition to before the last command.

Once you are happy with the design, save all the changes.

Multifunction bar and content

In the **Design** and **Advanced design** area, you will see the multifunction bar in the upper section of the browser window. This makes available the functions that can be used to design the Web site. Only the functions that can be used in the selected area (active area) are shown.

Functions are grouped together in function groups. Various subfunctions can be selected for some function groups. In this case, the row with the group name is shown with an arrow. Click the arrow to view the selection options. Select the desired subfunction for editing. The associated setting options are displayed in the group area.

Depending upon the selected area, various functions are available. See

- *Page view in browser*, below
- *Horizontal areas*, *on page 118*,
- *Vertical areas*, *on page 119*,
- *Content area*, *on page 120*,

The *File* function group is always available.

File function group

In this group, you can find the functions to save, undo, and repeat changes.

In addition, you can activate or deactivate the editing helps. The editing helps are frames around the areas that you have currently selected. This enables you to localize the areas on the page.

Page view in browser

Alongside the design and layout of your Web site, you can also define how the Web site is shown within the browser.

The corresponding function groups are shown when then browser background is selected as an active area. In this case, the complete browser window is enclosed in red beneath the multifunction bar.

Area function group

Here you can set the background colour and can upload a background image. Read about the basics of this in *Uploading images*, *on page 28* and Colour selector, on page 29.

The image or colour is shown under the web page. If the web site is set smaller than the browser window, the colour or the background image will be a frame around the web site. Note that background images have a higher priority than background colours. If the background image is not visible, check whether you have uploaded a background image.

Width and padding function group

Here you can define the width of the Web site in the browser. You can specify absolute values in pixels (px) or relative values in percent (%). Relative values are relative to the width of the current browser window. If the user changes the width of the browser, the width of the web site will change correspondingly in the browser.

With *Top margin*, you define the space from the top of the browser window to the top of the Web site.

Page areas function group

Here you can define which individual sub areas of your Web site are displayed. See *Web site structure*, *on page 114*.

Note: Remember that the page elements assigned to the areas are hidden if their corresponding areas are hidden. The page elements may then have to be arranged in other areas before hiding; see *Page elements and navigation, on page 121*.

Icon set function group

Some functions and statuses are triggered or displayed with icons. There are pre-defined sets for these icons. Click this icon to view the list of the various icon sets. Click on the set that fits your design the best and save your changes with **Apply**.

Horizontal areas

Horizontal areas are the *Header*, *Footer*, *Top* and *Bottom*, see *Web site structure, on page 114*. In addition to the *File* function group, the following additional function groups are also available:

Area function group

This group contains all the functions that can be used to configure the background and dimensions of the current area.

Here you can set the background colour and can upload a background image. Read about the basics of this in *Uploading images, on page 28* and Colour selector, on page 29. Note that for entire areas, background images have a higher priority than background colours.

Use *Margin* to set the space between the active area and other areas.

Use *Padding* to set the space between page elements within an area to the edge of the area.

Alignment determines the placement of the page elements in an area.

Font function group

You can format the individual text elements of the current area such as, for example, headings and links as well as set various fonts for these.

Page elements function group

Page elements are functional elements that can be placed in all areas apart from the content area. The visitor navigates through the web site with these and opens the functions. See also *Page elements and navigation, on page 121*.

In addition to making the page elements available on the web site, you can also edit their design to a certain extent by uploading images and changing colours.

(Active) button / (Active) button - Right Image

Buttons are areas that contain links. Depending upon the template, these buttons are designed differently. See *Figure 9* and *Figure 10.*

Figure 9: Rectangular buttons

Figure 10: Buttons as tabs

You can assign a background image to these buttons. For simple rectangular buttons such as in *Figure 9*, it is good enough to upload an image for *Button*. The image must be at least as long as the longest button.

If the buttons are tabs with rounded corners such as in *Figure 10*, you have to upload left and right-hand image sections, each containing the right and left pare of the tab. Proceed as follows:

1. Activate **Buttons** in **Page elements**.
2. Upload a background image for the left part of the tab.
3. Activate the **Button- Right image** in **Page elements**.
4. Upload a background image for the right part of the tab.

The image for the right side must be at least as long as the longest button, because it fills the tab from right to left.

In such a tabbed layout, the active tab is often highlighted. You can upload appropriate images for this purpose. Do this using the **Active button** and **Active button - Right image** options.

Box

A box consists of a header row and a list of entries or entry fields. Examples for this in horizontal areas:

- *Signing in*
- *Product search with link "Advanced search"*
- *Shopping basket summary as a box*

You can upload a background image and configure a background colour for the box and the header. See also *Uploading images*, *on page 28*. and Colour selector, on page 29. When doing this, please note the following:

- The background image for the box covers the background of the complete box including the header.
- The background image of the header is limited to the header and covers the background image of the box within it.
- The background colour of the box covers the box area without the header and covers the background image.
- The background colour of the header covers the header, covers the background image of the box and is covered by the background image of the title row.

In addition, you can define the width of the box within the navigation bar. Enter the values in pixels (px).

Vertical areas

Vertical areas are *Left* and *right*, see *Web site structure*, *on page 114*. In addition to the *File* function group, the following additional function groups are also available:

Area function group

This group contains all the functions that can be used to configure the background and dimensions of the current area.

Here you can set the background colour and can upload a background image. Read about the basics of this in *Uploading images*, *on page 28* and Colour selector, on page 29. Note that for entire areas, background images have a higher priority than background colours.

Use *Padding* to set the space between page elements within an area to the edge of the area. By changing the size values in the padding *Left* and *Right*, the page elements can possibly be reduced.

Font function group

You can format the individual text elements of the current area such as, for example, headings and links as well as set various fonts for these.

Page elements function group

Page elements are functional elements that can be placed in all areas apart from the content area. The visitor navigates through the web site with these and opens the functions. See also *Page elements and navigation*, *on page 121*. In the vertical areas, mainly page elements are placed in boxes, such as:

- *Currency selection via list*,
- *Shopping basket overview with all items in box format.*
- *Business hours as a box*

A box consists of a header row and a list of entries or entry fields.

You can upload a background image and configure a background colour for both the box and the header. See also *Uploading images*, *on page 28*. and Colour selector, on page 29. When doing this, please note the following:

- The background image for the box covers the background of the complete box including the header.
- The background image of the header is limited to the header and covers the background image of the box within it.
- The background colour of the box covers the box area without the header and covers the background image.
- The background colour of the header covers the header, covers the background image of the box and is covered by the background image of the header.

Content area

Area function group

This group contains all the functions that can be used to configure the background and dimensions of the current area.

Here you can set the background colour and can upload a background image. Read about the basics of this in *Uploading images*, *on page 28* and Colour selector, on page 29. Note that for entire areas, background images have a higher priority than background colours.

Use *Padding* to set the space between the content (images and text) to the edge of the area.

Font function group

You can format the individual text elements of the current area such as, for example, headings and links as well as set various fonts for these.

View function group

Here you can see a preview of the content of various pages of the web site (for example, Home page, shopping basket) as they will look with the current design settings. The drop-down menu contains a list of various content types that are displayed in the content area. This means that you can check very easily whether all content is readable using the current design. Sample text is displayed in the content area for each type that you select.

Depending upon the selection, another function group may be shown. In this, you can upload background images and set colours for the respective contents.

Work with the various settings in order to find the optimal view. Use the *Undo* function to restore the condition to before the last command at any time.

Page elements and navigation

The term navigation describes how the customer moves around the Web site and how he opens individual pages or calls functions. You can configure navigation for your Web site individually. This is done by defining the distribution and arrangement of the individual functions on the pages of your Web site. These functions include:

- link to home page,
- Link to the categories
- Logo display
- display of a compact shopping basket,
- display of the sign-in box,
- product search display.
- Display of promotional products

A corresponding page element exists for every available function. This element is used to display and call the function on the page. Place the page elements respectively on the page.

In addition to this, you can create user-defined page elements; see *User-defined page elements*, *on page 122*.

All page elements are available for every area shown in *Figure 8*, *on page 114* except for the content area. Due to the way they work and their design, certain functions are best used in specific areas. They function in other areas, but are out of place and disturb the design or do not fit in the defined area. With your design you decide which page elements are assigned to which areas so that they are completely visible and can be used.

If you move the mouse over a page element in the quick design or advanced design, the functions are shown with which you can edit the design. The following functions are available:

Table 12: Functions for page elements

Function	Comment
	You can move the page elements to different areas or within an area by using drag & drop. Click the icon for the corresponding page element, keep the mouse button pressed down and drag the mouse pointer over the target area. A red dashed border indicates the position at which you can deposit the page element. Now release the left mouse button. The page element is displayed at the corresponding location.
	This deletes a page element from the area.
	Details can be edited for some page elements. These include all user-defined page elements. Click the icon to call up and edit the details.

This is how to add a page element:

1. In the area in which you wish to place the page element, click **Insert page element**.
2. Select the desired page element from the list.
3. Click **Insert** to apply the page element for this area.

Page elements that are marked in the list with an asterisk (*) are already on the web site.

Page elements that are shown in grey are not available at the moment. Either the corresponding feature has not yet been activated or the maximum amount has already been reached.

Browser title of the page page element

This page element shows the title of the current web site as it is shown in the title row of your browser. If you put this page element as the last thing on your web site, in the footer, you increase the ranking of your page for search engines.

Page elements for search on the web site

A search function on the Web site is provided to allow visitors to find information directly. You can offer your customers a product search or a general search function.

There is a separate page element for each of these searches. You must place this element on your Web page in order for the function to be made available to your visitors.

When searching for products, the system looks for the search term in all product data. The search function can be offered as a simple search box, or with more advanced options. Customers can only search for visible products; see *Visibility*, *on page 23*. This search is faster than the general search. For the product search, use the page elements *Product search with link "Advanced search"* or *Product search with entry field*.

The general search function includes all types of page and product. If the search term appears in both product descriptions and in pages such as categories, blogs and forums, then all these objects are displayed in the hit list. For the general search, use the page element *General search as an entry field*.

The search field allows the visitor to enter several search terms. These terms are linked by the AND operator during the search. In other words the search function shows objects that contain all terms.

User-defined page elements

As well as the specified page elements, you can also define your own. To add such an element, proceed as follows:

1. Activate the area in which you wish to place the page element.
2. Click **Insert page element**.
3. Click on **User-defined page elements**.
4. Select an element type and click **Insert**.
5. Edit the corresponding details and then click **Apply**.

The following types can be used for user-defined page elements:

- Text (HTML)

  This element allows you to show short, HTML-formatted texts in the relevant area. This can be used to display notes or information for your customers. An example of this is an informational text about delivery and payment. For more on formatting the associated text field, see *Working with text fields*, *on page 26*.

- Text with heading (Box with HTML)

  This element allows you to show short, HTML-formatted texts in the relevant area, in a box with a title. This can be used to display information or a group of functions for your customers. For more on formatting the associated text field, see *Working with text fields*, *on page 26*.

- Link

  This element allows you to display links in the relevant area. This can be used to provide links to additional internal or external Web pages for your customers. Examples of this are *Link to contact information* or *Link to business hours*. Always enter external pages in the following form: *http://www....*

User-defined page elements adjust their size and design to fit the relevant area. If no user-defined page elements are permitted or if the maximum permitted number of elements has been reached, the selection is deactivated.

> *Caution:* If you remove a user-defined page element from the page area, you delete the entire element including its content. If you want to use it again, you must create it again.

You can access the user-defined page elements in the list of your own styles. See *Edit page elements, on page 124*. This can be necessary if the elements contain errors and thus can no longer be accessed over the page preview (JavaScript, for example).

Own styles

Page: Design » Own styles

A style contains all the information about the presentation of your Web site. This includes the definition of colours, images and fonts as well as the layout configuration and the distribution of functional elements on your Web page. You can create several styles for your Web site. The basis for a style is a template that you have used from the template selection. See *Templates, on page 124.*

In the table, you can see all styles you have created for your Web site. A preview image is displayed for each style. The image shows the original layout of the template for this style. If you make changes to the style, these changes are not visible in the preview image in the table. As soon as a style is edited and the changes have been saved, the change is indicated by an icon (paintbrush) on the preview image. In addition, the date of the last change to the respective style is entered in the table.

Use the photo symbol to upload your own image for the style. This is relevant if you export your own style. See *Export and import of styles, on page 124*.

The style that determines the look of the web site is the style used. It is shown indented on the first position of the table.

You can edit all the other styles without this having any effect on how the Web site is presented to your customer. This allows you to prepare and test additional styles. You can activate one of the other styles at any time. To do this, click **Activate now**.

You can edit a style using one of the following methods:

- Click on **Start quick design**. This takes you to the page preview, where you can edit the basic style settings. For more information, see *Quick design, on page 125*.
- Click the link **Start advanced design**. This takes you to the page preview, where you can edit the style directly. All style editing functions and options are available. See also *Design basics, on page 113*.

The **View on the web site** link allows you to see how your Web site would appear in this style.

Before making comprehensive changes to the style, you should first make a backup copy. Click **Create backup**.

You can create new styles by importing them from the templates or copying existing styles.

Export and import of styles

You can export a complete style and import the design, for example into another shop.

During export, the files are compressed and saved in a file of the type *.style*. A log is displayed. This lists which page elements, pages, and functions must exist on the target system in order to import the style successfully. Print the log. This enables you to check before the import whether all requirements are filled for successful import.

You can upload your own preview image for the style which is to be exported. To do so, click the photo symbol of the export style. In the following dialogue, upload an image file with a screenshot of the style. This will also be exported. After the import, your preview image is shown for the style.

After the import, a log is shown. Here information about problems are shown which occurred during import. If this information is present, check the design and correct the errors manually.

The imported style will be shown as a new entry in the table.

Edit page elements

User-defined page elements contain text fields in which you can also enter HTML code. If the code is not correct, this can lead to your page no longer functioning in design mode. This prevents you from gaining access to the offending page element.

Use the safe mode in the style table to always have access to your user-defined page elements. You can edit or delete page elements here at any time.

For more information, see *User-defined page elements*, *on page 122*.

Templates

Page: Design » Templates

All available style templates can be found under **Templates**. Each template defines a specific layout and design. You can either use these templates unchanged for your Web design or use them as a basis for individual customisations.

The templates are classified into two major groups: *private Web sites* and *commercial Web sites*. Below this level there are various suggested industry templates and style guides. There are various basic templates per type, for which additional colour variants may exist.

To select a template, proceed as follows:

1. Select a topic. To do this, browse through the structure displayed of the listed topics. The available designs for each topic are displayed.
2. Select the template you prefer from those that are shown. The design is displayed in a magnified view in the right column. If there are variants, they are shown in the form of colour boxes below the preview image.
3. Select your colour variant. The available degree of customisation of the selected template is displayed below the image using paintbrush symbols. If more paintbrushes are displayed, you have more freedom to customise the template. When you click the preview image, a larger illustration of the design is displayed in a new window.
4. Click **Apply** to import the selected template into the table in the **My styles** tab.

In case you do not want to use a preconfigured design and you wish to create your own design from the bottom up, at the end of every main group the *Free templates* area is available. These contain various layout variants without designs. This gives experienced designers the maximum level of freedom to customise.

There is also a Display all templates function. This generates an overview of all templates regardless of the sectors and styles.

Note: If you do not change the name of your own template and load a style with the same name, any changes you have made will be overwritten and the style will be reset to its original settings. You will be asked to confirm this command.

Quick design

Page: Design » Quick design

You can use the Quick design function to change entire design of your current Web site style with just a few mouse clicks.

Caution: Any changes that you make here are saved automatically and can be seen on the Web site immediately. Create a backup copy before working with quick design.

Because the quick design is a special case of advanced design, we recommend learning the basics about design. To do so, read *Design basics*, *on page 113* and *Multifunction bar and content*, *on page 117*.

In the quick design, you cannot select any areas. The multifunction bar offers the following special functions.

Logo/Header image

You load the images directly from the file management. You must have previously uploaded these images into the file management. For more about this, see *File management*, *on page 30*. You can also provide a link with the logo.

Colour

You can set a basic colour for the entire design using the *Colour* option. Your selected template is displayed using the specified basic colour, with the areas using matching colours. This colour is shown in the box of the *Colour* function. If you select a colour, this is used as the new basic colour for the design and the matching colours are recalculated. The areas of the site are then displayed using the newly calculated colours. If the design template consists of several basic colours, there is a selection option for each colour. Read about the colour selection in Colour selector, on page 29.

Font

Here you can select a shared font for all areas of the web site.

Template

You can select a template for your Web site here. All other design settings will be overwritten.

Caution: All settings made in Quick Design overwrite any other settings that have been configured previously in the *Design* area.

If you are happy with the basic settings, but wish to customise individual areas further, open the **Advanced design**.

11. Orders

Page: Orders ›› Orders

Opening the page by clicking **Inbox** displays the new orders to you. New orders are orders for which the *Viewed* status has not been set.

All orders for which the status *Viewed* has not yet been set will be shown in bold.

The last status set is always shown for the order in the table.

If an order contains a customer comment, this is indicated by a special symbol behind the order number. if you place the mouse there, the comment is shown.

To see the details of an order, click the order number. To open the details in a new window, click the icon in front of the order number.

You can only delete orders with the status *Rejected* or *Archived*.

As soon as you have opened the details of an order, it will be set to *Viewed*. This also sends a corresponding e-mail to the customer. The corresponding e-mail event must be activated for this to occur, however. For more information, see *E-mail settings*, *on page 58*.

> Note: If you need an overview of all orders for a customer, click the customer name. All of the customer's orders are listed in the **Orders** tab.

Orders – Details

Page: Orders ›› Orders ›› [order] ›› General

The general properties of an order provide you with an overview of all necessary order information such as the current processing status, products ordered, delivery and billing address, and so on.

The market status is updated with the current date and time after saving. Multiple statuses can be set. Registered customers can view the status in the shop.

The order number is assigned by the system. You can change these.

The order confirmation is sent to the e-mail address specified in the billing address for this order.

You can send the invoice in PDF format as an e-mail. The invoice must be generated previously. If multiple invoices exist, the last created will be sent.

For downloadable products, you can manually send the link to download.

In the internal note, you can save processing notes or additional information about the order. This data is not shown to the customer.

You can only delete orders with the status *Rejected* or *Archived*.

It is possible that a *Conflict warning* is displayed for an order. This applies to orders that were paid using external payment systems. A conflict occurs when the order value and the transaction value differ. This difference can happen if the order or shopping basket is changed subsequently. Such a change may include, for example, adding a new item to the order. Since the customer has already paid via the external system, the difference occurs and a conflict warning is displayed.

When doing this, please note the following:

- If you set an order to *Rejected*, the stock level for the relevant product is corrected automatically.
- Due to security reasons, credit card data in the database for orders paid to you by credit card (payment method Credit card, manual) is deleted after the order is set to the status of Paid. The only information that remains is a note that the order was paid by credit card.
- Before the order confirmation e-mail message can be sent, the *Inbox confirmation* e-mail event must be active. For more information, see *E-mail settings,* on page 58.

Editing mode

To change the order, click the **Edit** button. This displays all relevant information in entry fields where it can be edited. Delete functions are activated for the entries in the order list. It is also possible to add new entries.

When you click **Update**, the order will be recalculated with the current values and displayed again. This processing status remains until you accept the changes with **Apply** or cancel all changes with **Cancel**.

> Note: It is also a good idea to notify the customers about changes made to their orders. To do this, use the **Send order receipt confirmation** link in the detail view.

Orders with the status *Rejected*, *Closed* or *Archived* cannot be edited.

You can change the limits for downloadable products for this order. See also *Creating a downloadable product*, *on page 70*.

Documents

Page: Orders ›› Orders ›› [order] ›› Documents

For each order, it is possible to generate various documents, such as invoices, packing slips, and credit notes. You can create documents with the following methods:

- Running the batch command *Create and print documents...* for the table of orders.

  Use batch commands to create and print packing slips and invoices. In addition, the displayed status can be changed in the dialogue as well. The documents created in this manner are added to the document list of the corresponding order.

- Create the documents in the details of an order on the **Documents** tab

  The **Documents** tab becomes active when you are not in *Edit mode* for an order. The number shown in brackets after **Documents** shows the number of documents which have been created for the current order.

For more information about document details, see *Document details*, *on page 129*.

In addition to printing, you can display every document in PDF format and send it via e-mail.

Take note of the following information when working with order documents:

- You can only delete documents which have not been finalised. Finalised documents cannot be selected and therefore cannot be deleted.
- Changes in amount or deleting line items affects the document but not the order itself.
- Changes in the order only affect documents that are created after the changes have been made. Documents that were created before the changes were made remain unchanged.
- Changes made to quantities in the documents do not affect inventory levels.

> **Note:** When printing via the browser, depending on the browser settings, disruptive headers and footers (such as page number, Internet address, date) may also be printed. You can change these settings. For Firefox, click *File* ›› *Page Setup* in the menu bar. This has a *Margins & Header/Footer* tab. The values entered here are printed on every page printed via the browser. If you do not wish to print any of this information, simply delete the entries in the two fields.

Document details

Various numbers and date entries must be entered for each document type. Always click **Save** after entering the document number and date. Otherwise, the current data will not be applied in the print view

The sender information is taken from the Web site address data; See *Address*, *on page 38*.

The quantity values can be adjusted to fit the individual line items or they can be deleted. The line item will be deleted from the document without deletion confirmation. Document sums are updated after saving.

If a line item number is marked with an asterisk (*), this means that this product is contained in at least one other document of the same type.

In the print preview, additional customer information is displayed below the customer address. This is information that the customer has entered in *My Account*. The documents are printed in the language that the customer used for the order.

If you would like to save your documents so that they cannot be changed, you can use the **Finalise** function. After clicking *Finalise*, documents can still be displayed and printed but they can no longer be edited or deleted. In this way after finalising the corresponding process, you can save all of your documents in the system in a tamper-proof state. You will have to create new documents for possible amendments and corrections.

The comments on the payment method are only printed on the invoice if the order status *Paid* is not set.

UPS packing slip

A UPS packing slip offers you the possibility of configuring order tracking for the corresponding orders. This allows you and your customer to track the delivery status of the package.

To do so, enter the UPS tracking number into the details of the UPS packing slip. This number is generated by the *UPS WorldShip* software. This is a requirement for package tracking.

Preparation

In order to offer your customers package tracking, you must register with UPS and install the *WorldShip* software.

Use the **Register with UPS** link to register with UPS. After registration, you should log in and request a customer number in the *My UPS* menu.

In the next step, request the *WorldShip* software from UPS. To do this, click the **Order UPS WorldShip software** link. Complete and submit the form that is shown. Or you can also download the software from the UPS website.

Please install this after it has been received. Follow the instructions provided by UPS. Read the chapter about XML import and reading the tracking number in the UPS software handbook.

> *Caution:* A shipping weight must be provided for products that you wish to send using UPS.

Creating the UPS control number

To create the UPS tracking number, the packing slip must be exported and opened in *WorldShip*. A shop address is necessary for this. The packing slip cannot be exported without this address. If your shop address does not satisfy the UPS requirements, you will receive a relevant notification with a link to the shop address.

Proceed as follows:

1. Create a document of type *UPS packing slip* in the shop administration for this order.
2. If all entries are correct, click **Export**.
3. Choose a place to save the file and a name for the export file.
5. Start *UPS WorldShip*.
6. Select the menu to import XML files, for example *Import/Export data*.
7. Select a matching import method, for example *Automatic XML Import*.
8. Select where to save the XML file and start the import process.
9. Select the shipping archive after completing the import process and look there for the matching package. The tracking number is shown.

The UPS WorldShip software is being developed continually by UPS. If you are not able to perform the import and creation of the tracking method using the method described previously, read the current UPS WorldShip handbook or contact someone at UPS.

Activate order tracking

Enter the UPS tracking number in the *UPS tracking number* field of the relevant document *UPS packing slip*.

Save your entries by clicking **Save**.

After saving, the **Track shipment** link is displayed next to the UPS tracking number. Use this link to open the UPS page where you can see the status of your delivery.

Order tracking in the shop

As soon as the tracking number has been entered and saved, the order tracking link also becomes available for the corresponding customer.

The customer opens order tracking in *My Account* under the *Query order status* option. The UPS tracking number is also displayed as a link in the order. The customer can use this link to open the UPS page where he can see the status of his delivery.

A link to the order tracking is also inserted into every status e-mail sent to the customer.

RBS WorldPay transactions

The *Amount* column shows the value from the basket. The *Authorised amount* column shows the value in the currency that the customer paid to WorldPay.

In the *Status* column, you can see for which orders you must perform a manual debit. Use the **Open RBS WorldPay administration** link to view and edit the transactions at RBS WorldPay.

The *AVS* column shows the AVS Code for the transaction. The AVS code (address verification system) displays the results of the customer data check. Not all RBS WorldPay access methods support this AVS code. It depends on the customer's bank and the type of contract you signed with RBS WorldPay.

12. Marketing

Here you can find the functions for all sales-promoting activities. Use this to manage your customer relationships and increase the market availability of your products.

Newsletter campaigns

Page: Marketing » Newsletter » General

Use newsletters to send out the latest information to your customers, such as promotional offers or discounts.

Before creating a newsletter, you must first create a newsletter campaign. A newsletter campaign can be regarded as a container for newsletters and related data. Campaigns can be used to group newsletters.

Newsletter campaigns - Settings

Page: Marketing » Newsletter » Settings

In the **Subscribe to newsletter** section, you can configure and edit the texts that describe your newsletters. The language-dependent text is displayed on the Web site above the list of newsletter campaigns. It allows you to display information and notes on your newsletter campaigns for your customers.

You can also offer your customers the possibility to subscribe to your newsletters during the order or registration process. To do this, set the option in the **Allow product comparison** section to *Yes*. The text that you write there is shown with the selection of the newsletter campaigns in the specific address form.

Creating a newsletter campaign

What should you do when you create the newsletter? The next section will describe the individual steps involved, without going into too many details. These details are discussed in the relevant chapters. To create a newsletter and send it to your customers, proceed as follows:

1. Create a newsletter campaign and provide a meaningful name.
2. Enter the details of the campaign. Add a description to further explain the name and edit the sender data. You must set the e-mail address for test distribution. For the basics about the campaign details, see *Newsletter campaigns – Details – General*, *on page 132*. Do not make the campaign visible until all data has been entered and tested.
3. Create a newsletter in the details of the newsletter campaign on the **Newsletter** tab.
4. Open the details of the new newsletter and enter the relevant data and lay out the text. For more information, see *Newsletter details – General*, *on page 133* and *Creating the newsletter content*, *on page 134*.
5. Conduct a test distribution, and check the results. Note that in this test e-mail, the placeholders will not be replaced by current data.
6. Normally, subscribers register for your newsletter using the Web site. However, if you already have addressees for the newsletter from another source, you must enter them. Do this on the **Addressees** tab in the campaign details. Enter the known addressees or import the data. See *Newsletter campaigns – Details – Addressees*, *on page 132*.
7. In order to inform visitors to your Web site of your newsletters and to interest them in subscribing, you need to enter and display a corresponding text. For more information, see *Newsletter campaigns -* , *above*.
8. Once all the preparatory work is complete, set the campaign as visible. You can do this either in the campaign details, or by running a batch processing command in the table of newsletter campaigns.
9. In order to allow your Web visitors to sign up for the newsletters, you also have to display the corresponding function on the Web site. This is for one thing the subscription during the registration or order process, see *Newsletter campaigns - Settings*, *above*. This is done using the navigation elements

Newsletter subscription and *Link to newsletter subscription*. See *Page elements and navigation*, *on page 121*.

This completes the creation of the newsletter campaign and publishes it on your Web site.

Newsletter campaigns – Details – General

Page: Marketing » Newsletter » General » [campaign] » General

Here you can manage the data that contain additional information about the campaign and in addition that are useful for the delivery of the newsletter.

Name and *Description* are shown on the web site on which the customer subscribes to the newsletter.

Use the *Language* drop-down menu to select the language for which the campaign will be created. One feature is the language selection *International*. Campaigns created with this option are valid for all languages.

Sender Name, *Sender e-mail* and *Subject* are all standard settings for all newsletters from this campaign. You can overwrite the default settings in the details of the specific newsletter if desired. The name and e-mail address of the sender are formed together to an expanded e-mail address such as: *Shop Team ‹info@provider.com›*

The *E-mail for test* address is used by all newsletters in the campaign for text mailings. At the time of campaign creation, the Web site e-mail address is entered automatically; See *Address*, *on page 38*.

Newsletter campaigns – Details – Addressees

Page: Marketing » Newsletter » General » [campaign] » Addressees

Addressees are planned recipients of all newsletters of a specific campaign. There is no direct assignment of addressees to individual newsletters. Addressees who receive a newsletter are referred to as recipients; see *Newsletter details – Recipients*, *on page 135*.

The table lists all the addressees who are entered in the current campaign. The following methods exists to add addressees to the list:

- Direct entry of customer name and an e-mail address. This possibility is best for addressees that are not registered customers.
- Direct entry using customer number
- Add all customers of a specific customer group
- Add from tray
- Importing addressees; see *Addressee import*, *below*
- Visitors that register themselves on the website for newsletter campaigns. For more information, see *Subscription from the Web site*, *on page 133*.

When addressees are deleted for registered customers, only the assignments to the campaign are deleted. The other customer data remain. Unregistered visitors are deleted from the system for this campaign.

> ***Caution:*** Deleting this also deletes the "Subscription status" (*subscribed* or *unsubscribed*) for the corresponding customer. If one of the customers is added to the campaign later, the status is automatically set to *subscribed*. This can lead to legal problems if a customer receives a newsletter from which he had actually unsubscribed. Think about this before adding a customer manually.

Addressee import

Use this function to add subscriber lists prepared elsewhere. The data must exist in a simple text file with individual values are separated by a specified delimiter.

You can set the delimiter for the file before import.

When creating the file, orient yourself on the example shown on the page.

Subscription from the Web site

The web page visitors can subscribe to the newsletter in the following ways:

- Directly subscribing to newsletters on the web site
- Open the pages to subscribe to newsletters using **Subscribe to newsletter**
- For registered users, subscribing under **My account** ›› **Newsletter**
- Subscribe during the order process

The user is shown a page with the newsletter offering. He selects the desired newsletters and clicks **Subscribe.**

Due to security reasons, the customer receives an e-mail message that asks him to confirm that he has subscribed to the newsletter. After confirmation, he is added to the addressee list with the status *Subscribed*. This is to prevent unauthorised people from subscribing to the newsletter on behalf of others. This process is the double opt-in process.

For subscribing in the order process, the double opt-in process does not occur because it is assumed that it is not an unauthorized use of the e-mail address.

Unsubscribing from newsletter is done the same way. The user must confirm unsubscribing by e-mail for his status for the corresponding newsletter to be set to *Unsubscribed*.

> Note: The subscription and unsubscription of newsletters and the corresponding confirmations are events for which the system sends e-mail confirmations. To enable this, the corresponding e-mail events must be activated; see *E-mail settings - Events*, *on page 58*. If you, as the administrator, assign customers to newsletters manually, then no event is triggered.

For unregistered customers, you must provide one of the following page elements on your web site:

- *Link to newsletter subscription*
- *Newsletter subscription*

For more on working with page elements, see *Page elements and navigation*, *on page 121*.

Newsletter

Page: Marketing ›› Newsletter ›› General ›› [campaign] ›› Newsletter

Newsletters are e-mails that you send as part of a newsletter campaign to subscribers.

Newsletters can only be created using the table. For more information, see *Adding records*, *on page 21*.

Newsletters can only also only be deleted using the table. For more information, see *Deleting records*, *on page 21*.

Newsletter details – General

Page: Marketing ›› Newsletter ›› General ›› [campaign] ›› Newsletter ›› [newsletter] ›› General

In the general newsletter details, you create the content and edit the sending data such as the mailing date or sender address.

Mailing data

Mailing data for newsletters are data that are imported for sending.

The name and e-mail address of the sender are pre-filled with the date from the general properties of the corresponding newsletter campaign. Both fields are put together to an expanded e-mail address such as: *Shop Team <info@provider.com>*

Use *Send date* to set when the newsletter will automatically be sent to subscribers, in case you do not want to send immediately.

The recipient address for the test e-mail is defined in the general properties of the corresponding newsletter campaign. As long as no address is entered for the test, you cannot send a test e-mail. When sending a test e-mail, the placeholders will not be replaced by current data. No coupons are created for test e-mails.

Design

You can send the newsletter as a pure text or with formatting, images, and links. You can control these over the *Use HTML* option. If you have selected *No*, all HTML code and formatting will be sent as text. You cannot use a template. If you set this option to *Yes*, all HTML instructions will be applied to the e-mail.

The basic structure and design is selected using a template. The template is loaded into the *Text* field. Text previously contained there will be deleted after confirmation.

The text and the design can be edited further in the WYSIWYG editor. See *WYSIWYG Editor*, *on page 26*.

> Note: Newsletter templates are pre-set. You cannot modify them. To be able to create your own newsletter template, you can create a newsletter with your own design, duplicate it and use the duplicate to send a new newsletter.

Contents

The content of a newsletter can contain manually-created text and contents from the database, such as product and customer data.

Insert customer data using placeholders. The available placeholders can be found in the *Placeholder* box on the right side of the text field. To insert a placeholder in the *Text* field, click its name. It will be inserted in the field at the current cursor position. When sending the newsletter, the relevant information will be substituted for the placeholders. For customers who subscribed to the newsletter as non-registered users, you can only use the *Display name* placeholder for the display name. No data is stored for the other placeholders.

Product and category data are entered into the newsletter from the tray at the current cursor position. To do so, click **Add products and categories from tray**.

You must provide your customers with the opportunity to unsubscribe. Use the **Infotext about unsubscribing** placeholder for this. This placeholder inserts a link next to the text in the newsletter that the customer can use to unsubscribe from the newsletter, if desired.

You can also send coupons with newsletters. After selecting a coupon campaign, two new functions are activated that you can use to put coupon data into the text. See *Coupons*, *on page 135* and especially the section *Using coupons in newsletters*, *on page 137*.

Creating the newsletter content

Before you can edit the newsletter content with product and coupon data, place the corresponding products in the tray and create a coupon campaign.

Create the content as follows:

1. Set the *Use HTML* option to *Yes*.
2. Enter a fitting subject for the e-mail to make your customers curious.
3. Select a template.
4. Write and design your text.
5. Add placeholders at the correct places.
6. Make sure unsubscribe text is present. If not, insert the relevant placeholder.
7. Add products from tray.
8. Select the coupon campaign.
9. Enter the desired coupon data.
10. Check the content and design in the WYSIWYG editor.
11. Send a test e-mail. Note sure that the placeholders show example data in the e-mail.
12. Check the name and the sender address.
13. Set a mailing data if you want the newsletter to be sent automatically.
14. Save your entries by clicking **Save**.

Sending the newsletter

A newsletter can be sent in the following ways:

- Enter a mailing data.
- Click **Send now**.

After the newsletter has been sent, the corresponding data can no longer be changed and the newsletter cannot be sent again. You can use the Duplicate function to create a copy of the newsletter which you can use to edit or send out.

> Note: No newsletters can be sent in test shops; the **Send now** button is disabled.

Newsletter details – Attachments

Page: Marketing » Newsletter » General » [campaign] » Newsletter » [newsletter] » Attachments

Product and category images are saved as attachments to newsletters. The body will then contain a reference to any attachments. These images are sent as attachments with the newsletter e-mail.

If you click the file name, the image will be displayed. If you do not wish to send any images, delete the pictures from the attachment list as well as the corresponding link in the text.

> Note: This deletes the assignment of the image as an attachment, but does not delete the product image itself. This remains connected to the product.

Newsletter details – Recipients

Page: Marketing » Newsletter » General » [campaign] » Newsletter » [newsletter] » Recipients

Recipients are customers who have received the corresponding newsletter. The table lists all the recipients of the current newsletter.

Coupons

Page: Marketing » Coupons

Coupons are an important marketing instrument to motivate existing customers to buy and to reach new customers. Using coupons, you can provide absolute or percentage-based price reductions that you can attach to specific conditions. These are conditions such as using specific delivery and payment methods as well as purchasing specific products. A coupon can only be redeemed if the order fulfils these criteria.

Coupons are organized into campaigns. The campaign includes a code as well as all other parameters and settings. For editing the details of a campaign, the following tabs are available.

Coupons - General

You can change the following settings here:

- Type and size of the discount
- Minimum value above which the coupon can be redeemed
- Length of the validity period for the coupons in the campaign
- Number of coupons that can be used
  (The setting for this action is meant as follows: ‘The first 100 customers that buy this product receive...”)
- Single or multiple usage of coupons
  For example, if you place a coupon in the newspaper, multiple customers can use it.

Coupons - Validity

The table lists all the conditions that limit redemption of a coupon for the current campaign. If no entries are in the table, customers can redeem the coupons without any restrictions.

The various entries are inserted into the table from the tray. For more on working with the tray, see *Tray*, *on page 18*.

The conditions of the same type are connected with an OR. Conditions of different types are related by AND.

You have included a specific product, the payment method *Cash* and the delivery method *Pick up* in the table. To be able to redeem a coupon from this campaign, a customer has to order the product entered **and** select the delivery method *Pick up* **and** the payment method *Cash*.

Example 2: You have three products (*Product 1*, *Product 2*, *Product 3*), which you would like to send using the *Special delivery* delivery method and would like to offer your customers a coupon for this. Apply the three products and the delivery method in the table. To be able to redeem a coupon from this campaign, a customer has to order *Product 1* **or** *Product 2* **or** *Product 3* **and** select the delivery method *Special delivery*.

Coupons - Coupon codes

You can generate coupon codes with the following methods:

- Manual creation

  Proceed as described in *Adding records*, *on page 21*.

- Automatic generation using the code generator

  Enter the number of codes in the *Number* field and click **Generate codes automatically**.

- Creating new coupon codes using newsletter dispatch

  See *Using coupons in newsletters*, *on page 137*.

If you do not want to distribute the coupons to your customers through a newsletter, you can export the generated coupon codes into a text file using batch commands and then distribute them to your customers via other channels.

Notes

Note the following: when working with coupons:

- Coupon campaigns can always only be created for one currency. To offer coupons for the same event using another currency, you need to create a separate campaign.
- All coupons remaining in the possession of customers after the deletion of a campaign which are not redeemed lose their validity and are no longer recognised by the system.
- Deleted coupon codes lose their validity and can no longer be redeemed by customers.
- An entry field for entering the coupon code is made available to the customer in the shopping basket. However, this field is only displayed if there is at least one coupon campaign valid at the current time.
- If you specify the validity period of coupons, remember to respect any statutory provisions regarding the validity of coupons (for example, in Germany for 3 years).
- The *Redeemed* column is a good indicator of the success of your marketing promotion, since you can see here how well the coupon campaign was accepted.
- You can see whether a coupon was used in the order details.

Creating coupons

To create coupons and make them available to your customers, proceed as follows:

1. Create a coupon campaign.

   Enter all required values into the table. Save your entries by clicking **Save**. Allocate a meaningful name. Note that you cannot then change the selected currency any more. You can edit all other properties in the general details.

2. Enter the general details for the campaign.

   Add a description to further explain the name. Describe clearly why and for what reason you are issuing coupons, so that there are no misunderstandings when they are redeemed. This especially applies to coupons to which specific conditions are attached.

3. Define the conditions of validity.

   If you want to stipulate further conditions for the redemption of the coupon, set them on the **Validity** tab. Use the corresponding products, payment, and delivery methods from the tray.

4. Create the coupon codes.

   Enter your coupon codes manually or have them be generated automatically. For more information about this, see *Coupons - Coupon codes*, *on page 136*. If you want to distribute the coupons to your customers through a newsletter, you do not need to assign coupon codes. See *Using coupons in newsletters*, *below*.

Using coupons in newsletters

First, create a coupon campaign, see *Creating coupons*, *above*.

> Note: You do not need to generate any coupon codes. The system generates a new code for each newsletter that is sent.

All available coupon campaigns are listed in the newsletter details in the *Coupon campaign* selection field. Select the desired campaign.

After selecting the coupon campaign and clicking **Save**, the following special functions are shown:

- A new placeholder for the **Coupon code**

  Place the **Coupon code** placeholder in the newsletter text. When sending the newsletter, a separate coupon code is generated and entered for each customer.

- The **Insert coupon template** button

  This allows you to add not only the code but also additional information about the coupon campaign. The customer receives with the newsletter the name and description of the coupon campaign, the price reduction the coupon provides, and the coupon code itself.

Save your entries by clicking **Save**.

Product recommendations

Page: Marketing » Product recommendations

A product recommendation comprises sending an e-mail with a link to a certain product. The product recommendation is sent by customers to other customers, in the product detail view (Tell-a-Friend). The **Recommend product** link is displayed in the shop for this purpose on the product detail page.

> *Caution:* For the system to be able to send product recommendation e-mail messages when this function is enabled, the event must be activated in the e-mail settings. For more information, see *E-mail settings*, *on page 58*.

Product inquiries

Page: Marketing » Question about product

This allows you to provide your customers with the ability to send you questions or notes about the products in your shop.

> *Caution:* For the system to be able to send questions about products by e-mail, the event must be enabled in the e-mail settings and you must have entered a recipient address. For more information, see *E-mail settings*, *on page 58*.

etracker statistics

etracker Web controlling (*www.etracker.de*) is an Internet application for evaluating user data. This data is recorded and analysed in real time. Use these numbers to evaluate and influence the success and effectiveness of your Web page.

After setup, you can use this function for a limited amount of time. Etracker normally offers recording and reporting of visitors, click behaviour, pages opened, click behaviour, click paths, viewing times, and so on.

After the test phase is completed, you will be requested to select a service package. If you do not select a service package, you can only use a limited amount of the statistics features.

You can also use etracker to evaluate how your customers click on your Web pages. Etracker provides the *Clickmap* and *Heatmap* functions for this purpose. The Web site is ready for this analysis and sends the required data to etracker. In order to use the functions, you need to enable the *Transfer as URL parameter* option in the etracker administration. Contact your etracker support contact for more information.

> Note: If you use etracker, you must notify your customers about it. Add this to the content of your privacy policy.

General

Page: Marketing ›› etracker statistics ›› General

You can register automatically with etracker on the page.

If you are registered with etracker, this is where you enter your etracker registration data, and where you can manage the basic settings for search engine campaigns. The tab is divided into the following sections:

- Set up etracker account; see *Create etracker account*, *below*
- Registration data; see *Registration data*, *below*.
- Search engine reporting; see *Search engine reporting*, *below*

Create etracker account

If you have not yet registered with etracker, you can sign up here automatically. Once you have entered the registration data, this section will no longer be displayed.

Enter a password, complete the password confirmation and click **Set up account**. Use this password to sign in to the etracker administration.

Customer number, *Security code*, and *Direct Login Bookmark* will be entered automatically in the registration information.

You can also register automatically in the Set-up assistant. For more about this, see *Setup assistant*, *on page 33*, under *Settings for your shop*.

Registration data

If you have already registered with etracker, enter your registration information in the corresponding fields here. This includes the *Customer number*, *Security code*, and *Direct Login Bookmark*.

You can find the Security code in your etracker administration at **Settings** ›› **Setup / Tracking code**.

You can create the Direct Login Bookmark in your etracker administration under **Settings** ›› **Personal settings**.

Save your entries by clicking **Save**.

After you save the registration data, the **Show etracker statistics** link and direct login bookmark are displayed. Click this to go to your etracker administration.

The statistics displayed depend on your contract with etracker.

Search engine reporting

Using etracker, you can evaluate how easy it is to find your Web site using search engines such as Google or Yahoo. You must create a campaign to do this in etracker of the type search engine (generated index). Use the campaign assistant for this.

After creation, you can read the code parameter out of the campaign details. It takes the following form:

```
var et_se=3;
```

Enter the number, in this case 3, in the field of the same name on the **Search engine reporting** in the general etracker details in the website administration.

Save your entries by clicking **Save**.

Pages

Page: Marketing » etracker statistics » Pages

The table lists all the pages that can send information to etracker. Select the check box in the *Enabled* column for the pages for which information should be sent.

You can also specify an importance value for the individual pages. This defines how important it is for you that your customers view these pages. Using the etracker statistics, you can then evaluate which of the pages that you consider important are actually visited by your customers.

Select the corresponding importance for the page using the drop-down menu. The most important pages are allocated the setting 10.

Save your entries by clicking **Save**.

> Note: Depending on your page cache settings, you will need to update your pages after saving them. For information about this, see *Page cache*, *on page 37*.

To view the records and statistics for your Web site, open your etracker administration page.

Google Analytics

You can analyse the usage of your web site using Google Analytics. After this you must register with Google Analytics. After registration, you select the pages whose data is sent to Google. In your Google Analytics account, you can see the statistical data for individual pages statistically prepared for you.

> Note: If you use Google Analytics, you must notify your customers of this. Add this to the content of your privacy policy.

Product portals

Page: Marketing » Product portals

Product portals are Internet platforms that collect and offer products of various merchants in a single catalogue. They are also product search engines that help customers find and compare products and which contain a direct link from the product to the merchant's shop. For you as the merchant, this can be used to offer your products to a larger group of possible customers. To do so, you must export your products to the respective platform.

The table lists all the available product portals.

A list of country platforms exists for each portal. You can export your products to these platforms. The installed languages and currencies determine the available countries; see *Country settings*, *on page 55*.

Every country platform must be configured separately. To do this you must enable the platform. This can be done by selecting the relevant check box in the *Active* column and saving the entries by clicking **Save**.

The settings for each country platform are edited in the following tabs:

- **General**: By and large these are common setting options; see *General settings*, *on page 141*. Specialised parameters are possible; see the chapters on the individual portals.
- **Products**: The product list is edited for all platforms in the same way; see *Product list and export*, *on page 141*.

- **etracker reporting:** All platforms are edited in the same way; see *etracker reporting*, *on page 142*. Differing contents are possible.

> Note: The portals do not support HTML coding in the product descriptions. The HTML codes are automatically removed during export to allow you to use your product descriptions in the portals.

General settings

Page: Marketing ›› Product portals ›› [portal] ›› General

To use a portal, you must register there. A link to the registration page is available for every portal. In addition, there is a link to the home page of the portal.

During registration on the portals, you receive your sign-in data such as merchant login or merchant ID. For some portals, you must enter this sign-in information into the shop administration in the general details for the corresponding country platform.

> Note: Due to security reasons, passwords are displayed as asterisks in the entry field irrespective of their original length.

If you would like to transfer all products to a country platform, set the option, *Export all products* to *Yes*. In this case, the corresponding product list will be ignored. The **Products** tab is inactive. Although the product list cannot then be edited, any assignments remain. New products are automatically considered during the next export.

You can decide with variation products whether only the master product or all product variations will be exported. The option becomes active when *Export all products* is set to active.

You must enter a delivery method for your products. Customer must be information about a possible delivery method on the portal.

You can edit the display of your products on the portal by choosing which images and description texts will be transferred.

You can set up the automatic export for many portals. The export and uploading (if required) are repeated automatically at set intervals. This updates modified product information on the platform. This is also an advantage primarily for the portals which remove products from the catalogue after a certain time, for example, Google Base after 30 days. This allows you to keep your products up-to-date in the portal catalogue.

The **Export** button becomes active when the *Export all products* option is set to *Yes* or products are added to the product list.

If the platform requires the export file to be uploaded to it, the **Upload** button is displayed. This becomes active when all parameters are set correctly and the export file is generated.

> Note: Once you have configured all the parameters and an interval, test the settings manually using **Upload**. This way you can make sure that the parameters are set correctly for the automated upload process.

Product list and export

Page: Marketing ›› Product portals ›› [portal] ›› Products

On the **Products** tab, you can manage products that are exported to the corresponding platform.

The table lists all the products which are to be exported.

> *Caution:* The products can only be exported to a portal if the prices are specified for the tax model that is used by the portal. For example, if the portal expects prices that include tax, you must have specified only the gross (tax included) prices for the products, and no others.

To export products, go to the **General** tab of the relevant platform and click **Export**.

When products are included in the export file, the system checks whether all the requirements on format and content have been met. If a product does not fulfil one of the criteria, an error is displayed after the process is complete. There are two classes of errors – simple errors where the data can be automatically corrected in such a way that the product can be exported and serious errors where the product cannot be exported.

etracker reporting

Page: Marketing ›› Product portals ›› [portal] ›› etracker reporting

Etracker allows you to monitor the efficiency of a portal connection. Using statistics, you can generate a cost-benefit analysis for each platform. This provides you with full control over your costs, and a tool that will allow you to manage your work with individual portals.

To do this, the etracker functionality must be available in the Web site administration. The etracker functionality, which is activated for your Web site by default, is based on the *Basic services* from etracker. To configure an etracker campaign, you must book the *tracking 5000* with etracker.

The basis for the reporting are URL parameters you enter on the **etracker reporting** tab for each country platform. Each platform has its own parameters. These parameters are linked to the products which are exported to the platform. If a customer is forwarded to your shop through the portal, the platform is recognised by the parameters and the transactions are evaluated by etracker.

The parameters can only be generated through your etracker account in the channel of an etracker campaign. You must create a channel in a campaign for each country platform in etracker.

The parameters are displayed in the details of the corresponding channel in the following form:

URL: http://server/epages/Testetracker02.sf/?et_cid=5&et_lid=5

Transfer these parameters in the *URL parameters* field on the **etracker reporting** tab of the corresponding country platform of the portal.

In addition to this, Pangora also has sub-channels. When you export products to Pangora, these are distributed by Pangora to the attached portals. To allow etracker to evaluate the portal via which the customer was forwarded to your shop, relevant sub-channels are displayed in the statistics. You can create, for example, a *Pangora Germany* channel. Pangora then distributes your products to portals such as *Fireball.de* and *freenet.de*. In the etracker statistics, the *Pangora Germany* channel contains sub-channels for *Fireball* and *freenet*. Pangora uses abbreviations for the sub-channels. Contact Pangora for an explanation of these.

Kelkoo

The export of the prepared products is done in two steps:

1. Save the product list to the export file in Kelkoo format by clicking **Export**
2. Upload the export file to Kelkoo.

Register with Kelkoo before uploading. After you register, select the country in Kelkoo for which you want to upload the product list. This must correspond with the country displayed in the general platform settings in the shop administration.

Upload the file that was created during export into the Kelkoo administration.

When this is complete, the products are available for the Kelkoo search.

> Note: Do not open or edit the export file, otherwise the correct import of the exported file to Kelkoo cannot be guaranteed.

Google Base

Note the following exceptions:

- After uploading your data to Google, it may take one or two days until Google verifies and displays it. You must wait for Google to do this. You do not need to repeat the export during this time. If you want to have your information available in Google Base at a particular time, you must plan in advance.
- If the file contains errors, the incorrect products are not displayed at Google Base. Pay close attention to any error messages during export, correct the error and start the export again.
- Create a data feed with GoogleBase and assign the file name there. Enter this into the GoogleBase details of the shop administration into the *File name of the data feed* field.
- Your products will be removed from the Google Base catalogue after a certain time. Therefore, to update your products on Google again, upload a file at least once a month.

Amazon

In contrast to other product portals, the products are not sent to Amazon in an export file. Each product must be matched to an existing product in the Amazon catalogue. After successful assignment, the product can then be activated online at Amazon.

To publish a product with Amazon, do the following

1. Activate the corresponding Amazon country platform on the **Product portals** page.
3. Open the detail page and enter the access data.
4. Open the **Products** tab.
5. Paste the product using the tray or by directly entering the product number.
6. Click the product name.
7. Select an Amazon product from the list and click **Assign**.
8. Enter the required information in the offer details fields and save all entries by clicking **Save**.
9. Click **Set offer online**.

Note the following: when exporting products to Amazon:

- If a product code is saved for a product, it is automatically assigned to an Amazon product. If no product exists at Amazon with this code, no assignment is possible. A product must be created at Amazon with this code.
- You can enter a product code directly. All Amazon products with this code are then shown. Assign your product to one of the displayed Amazon products. The code is also saved as the product code in the product details.
- You cannot create any new Amazon products from the shop administration.
- The product name will be used as the standard for the search for offers. If no offers are shown for your product, change the search term in the search box and restart the search.
- You must assign each variation individually for variation products.
- If you would like to delete an offer from the Amazon catalogue, in the MBO in the details of the corresponding Amazon portal under **Products**, execute the *End offer* batch command.

Offer details

After the assignment, the details of the offer are shown. These data are listed in the Amazon catalogue.

Enter the price that you would like to charge in Amazon. The list price is entered by default.

Enter the delivery duration and article condition. If you would like to provide information or notes about the product for your customers, enter these into the *Condition* field.

If you place the offer online, it is sent to Amazon immediately. It is not shown in the Amazon catalogue immediately because Amazon edits the data.

If you set an offer to offline, is is invisible in the Amazon catalogue but is still exists within the Amazon system.

Google registration and XML sitemap

Page: Marketing ›› Google registration

As well as regular customers knowing the address of your Web site, an important factor for the success of your Web site is that the Web site and its content can be found by Internet search engines.

To ensure this, you need to register your Web site address with the search engine operators. The program provides a registration function for registering with Google, one of the most popular search engines.

The *Home page* is the address of your Web site, and is entered like this in Google's records. You can add notes or text about your Web site in the *Web site comments* field. This is to provide information to the employees of Google Services and is not displayed in the search results.

To register your Web site with Google, click **Register web site**.

Registering your site with Google does not guarantee that it will be added to the search index. Note the information about this in the SEO document.

You can click the link **Display indexed pages** to start a Google search for your Web site. You can verify immediately how your Web site is located and listed by Google.

> Note: Make sure that as many sites as possible link to your Web site. The more sites that link to your Web site, the greater the chance that your Web site address will be included in the index and will be found during a Google search.

XML site map

Use this function to send a list of internet addresses from your visible pages to Google. This allows your pages to be more current with Google. New pages are made public faster. This simplifies your indexing with Google.

You need your own domain in order for this to work, however.

Trusted Shops Certification

Page: Marketing ›› Trusted Shops Certification

Your customers require a high level of security for online purchases. Certification from Trusted Shops (*www.TrustedShops.de*) ensures this security for your customers and helps build trust in your shop. Along with checks for security and data protection, Trusted Shops also offers a money-back guarantee and comprehensive customer service.

Your shop is optimally prepared for certification with Trusted Shops.

When the check is successfully completed, you will receive a Trusted Shop ID from Trusted Shops.

Enter the Trusted Shop ID in the entry field. Save your entries by clicking **Save**. You must enter your own ID for each language.

You then have the right to display the Trusted Shops quality seal in your shop. There are two navigation elements which you can place on your Web site for this purpose. For more information, see *Page elements and navigation*, *on page 121*.

If you have not saved a Trusted Shops ID, the Trusted Shops page element will not be displayed on the Web site.

Trusted shops offers various templates, for the contact information or customer information that match legal requirements. In *Related topics*, click on **Sample formulations from Trusted Shops** to view the texts with Trusted Shops.

eBay

eBay offers are products that you upload to eBay and sell during an auction there.

To do so, you have to assign additional parameters to the product data that are necessary for the auction there. If you are unsure about the meaning of these parameters or how to use them, they are explained in depth on eBay.

In the shop administration, the eBay assistant helps you to enter all required data and parameters and to send the offer to eBay. For more details, see *Item settings/eBay assistant*, *on page 146*.

To be able to enter offers into eBay, you must be registered as a seller with eBay and have the corresponding eBay accounts. For information about the settings required, see *eBay settings*, *on page 62*.

In order to sell your products over eBay, do the following:

1. Register with eBay as a seller.
2. Set up your eBay account and perform additional settings. See *eBay accounts*, *on page 63* and *General settings*, *on page 63*.
3. Create a template that you would like to use to present your products on eBay. See *Templates on page 64*.
4. Prepare the corresponding products and place these in the tray.
5. Create the default values for your offers that are automatically set for each offer. See also *Default values*, *on page 149*.
6. Add products from tray into the table of eBay offers.
7. Look at the values in the offer details and change them if necessary.
8. Have your offer confirmed by eBay.
9. Send the offer to eBay.
10. Update all offers in the table.
11. If the customer has paid at eBay, an order is created from the offer that can be seen in the **Offers** point.

Items

Page: Marketing » eBay » Items

The table lists all the eBay offers with their current status.

To view the item offered on eBay, click the item item number.

In the *Current bid* column of the items table, you can see the current bid for the item, as well as how many bidders have bid on the item. If you offer more than one product for sale, the number of products that have been bid on is displayed in brackets.

The coloured bar in the *Current bid* column shows the relationship between the current price and the sales price in the shop. An arrow marks the current value. The colour fields have the following meanings:

Table 13: colour fields for item price

Colour	Description
red	Item price is lower than the shop price
yellow	Item price is similar to the shop price
green	Item price is higher than the shop price

The following specialised batch commands can be performed:

Table 14: specialised batch processing commands for eBay items

Command	Comment
Duplicate	When you duplicate items for sale and finished items, the new item is created in the start status.
Repeat an item	Copies of an item can be placed automatically in set intervals. The start item must be defined as a planned item with set start time. In the first step, select the start item and run the command. Next, you must set the repeat intervals. Enter the interval between items and specify how often the items should be created. Execute the command by clicking **Create**. If the product is not available and the option *Cannot be added to shopping basket* or *Set to "Not Visible"* is enabled in the product settings, the item cannot be uploaded automatically to eBay.
Verify	You can only test items that are not yet for sale on eBay or that are already finished. Offers that have not yet been verified cannot be placed on eBay.
Upload to eBay	The selected items are placed on eBay immediately, irrespective of a planned start time. The item must have been successfully verified.
Delete	Items that are for sale on eBay or are finished are only removed from the table and not deleted in the eBay system.
Update all items	Queries the state of all items on eBay

You can also upload the item to eBay when it is generated. Select the *Upload as an eBay item immediately* check box before saving the entry or importing the item from the tray. The item will be checked and sent to eBay. The default values will be used for new items; see *Default values*, *on page 149*.

It is also possible to create a new item from a product directly. For more information, see *eBay*, *on page 79*.

To open the details of an offer, click the name. As long as the item has not been sent to eBay, you can edit the details. See *Item settings/eBay assistant*, *below*. Details of items which are for sale on eBay and of closed eBay sales are displayed in an overview. They cannot be changed. There is also an **Orders** tab in the offer details. All orders pertaining to this offer item are displayed here. The table is comparable in composition and function to the table for all eBay items. For more information, see *Orders*, *on page 149*.

Item settings/eBay assistant

Page: Marketing » eBay » Items » [item]

The eBay assistant helps you create, edit, verify, and upload eBay items.

Apart from the product information, which is imported from the shop, all other parameters are eBay-specific.

The assistant contains multiple steps that can be performed sequentially as well as in any order.

Caution: To save the information you have entered or modified on individual pages, you must change page by clicking the **Next >>** or **<< Previous** buttons. The information is only saved if you do this. If you change pages using the links in the tab headings, the changes are **not** saved. The same applies if you leave the assistant without confirming your changes via **Next >>** or **<< Previous**.

To start the assistant, click the name of an item in the eBay items table.

Title

Through the selection of the eBay account, you can select on which eBay platform the offer will be placed. For more information, see *eBay accounts*, *on page 63*.

Caution: Payment and delivery settings are lost if you change eBay accounts. This is because they depend upon the country platform and are imported again when you change.

The subtitle includes a short description of the item, and which is displayed on the eBay page and also in the gallery directly under the name of the item.

The description contains the item description that is shown to eBay bidders.

Note: Due to security reasons, eBay restricts the use of active page contents such as JavaScript, Flash, and so on. If you use such elements in your description, your pages might not be displayed properly on eBay.

The template determines the presentation of your product on the eBay page. Define selection list of templates in the eBay settings. See *Templates*, *on page 64*. To use a template for the current offer, select this in the *Template* drop-down menu and click **Load template**.

Save your entries by clicking **Next>>**.

Category

Each item must be assigned to at least one specific eBay category. The following methods exist for category assignment:

- Enter the category number directly in the *Category 1* field.
- Select the category from the *Recently selected categories* drop-down menu. After selection, the number is entered into the *Category 1* field.
- Select a category from the catalogue structure. You can only select a category if an option button for this category is displayed in the *Selection* column. Click the respective category. The option button is marked and the number is entered into the *Category 1* field.

You can also assign the item to additional categories. There is one entry field for each category. The assignment procedure is the same as for the first category. The currently active entry field is indicated by an arrow.

If you own an eBay shop, you can also import the item into two categories used by your eBay shop. Select the target categories in the *Categories in your eBay shop* selection fields.

Save your entries by clicking **Next >>** or **<< Previous**.

Details

This is where you define settings that affect the sequence of events for the item. These are the same settings you edit when you place an item on eBay directly.

Consult eBay for more information about the usage, function, and any costs of the individual parameters.

> Note: If you set the *Accept returns* option to *Yes*, you should specify the conditions under which you will accept returns in the item description.

Depending upon the selected category, various product traits are displayed that you can fill out. Use these in order to make your item more visible at eBay.

Save your entries by clicking **Next >>** or **<< Previous**.

Layout

This is where you define settings that affect the presentation of the item on eBay. Consult eBay for more information about the usage, function, and any costs of the individual parameters.

In the drop-down menus for image types, all images are listed that you have available for the product. See also *Product details – Images*, *on page 72*. The address of the image is automatically entered in the respective entry field. If you would like to link to an image which is not listed in the drop-down menu, enter the address of the image in the entry field.

You can test whether the image is available at any time by clicking **Preview**.

Save your entries by clicking **Next >>** or **<< Previous**.

Delivery

This is where you define the delivery methods you wish to offer to your eBay customers. Each eBay country platform offers certain delivery methods, which are listed in a drop-down menu.

There is a list for domestic delivery and a separate table for international delivery. A maximum of three delivery methods can be selected for domestic delivery.

Select each method you wish to offer individually and allocate a price to it. Save your entries by clicking **Save**.

A universal method is available, which refers to the description of the item. Use this if none of the methods offered applies to you. Note that you must also enter a price here.

If you do not select a delivery method, eBay will automatically refer to the description or recommend contacting you as the seller.

Go from page to page by clicking **Next >>** or **<< Previous**, or click the tab headings.

Payment

This is where you define the payment methods that you wish to offer to your eBay customers. Each eBay country platform offers certain payment methods, which are listed in a drop-down menu.

Select a method for each and save your entries by clicking **Save**. You have to select at least one method. A universal method is available. This refers to the description of the item. Use this if none of the methods offered applies to you.

For certain items, the selection of the payment method *PayPal* is required. In this case, you will be notified about this during the item verification.

Go from page to page by clicking **Next >>** or **<< Previous**, or click the tab headings.

Verification

The last step of the eBay assistant consists of verifying all settings. If all entries are correct, the item can be placed on eBay.

Click the Verify button or Activate scheduling to test your settings. If all the information is correct, the fees for the offer are displayed. You can place the item on eBay by clicking *Upload to eBay* or *Upload to eBay Now*. Scheduled items are placed on eBay at the entered start time.

Once an item is for sale on eBay, the parameters can no longer be changed.

Default values

Page: Marketing » eBay » Default values

There are many settings for an item, and many properties are the same for most items. For this reason, you can assign standard values to these parameters to avoid having to enter them again for each item.

An overview of all default values is displayed on this page. The areas shown correspond to the steps of the eBay assistant.

You can change these default values at any time. To do this, click the link **Customise default item values**. You are transferred directly to the corresponding page of the eBay assistant. For more details, see *Item settings/eBay assistant*, *on page 146*.

Changes to the default values are only valid for the products that are included in the list of eBay items after the changes.

Orders

Page: Marketing » eBay » Orders

As soon as a bidder buys your product or wins your auction, this item is marked as closed and entered into the table of eBay orders.

The individual columns have the following meaning:

Table 15: table columns for eBay orders

Column name	Comment
Item	Initial offer for the order. The icon indicates the eBay platform.
User account	eBay user who won the item Click the icon to send an e-mail message to the address in the user's eBay profile.
Price	Price for which the item was won
Customer	Name of the bidder in the customer administration of the shop; When the details of a customer are transferred from eBay for the first time, the system creates him as an unregistered customer. The eBay e-mail address is saved as well. During further data transfers, the customer is identified using this e-mail address and all eBay orders for this customer are bundled.
Order	Order number, when sale has been finalised; Otherwise, a notification is issued that the customer has not yet finalised the order.
Feedback	Displays the feedback for this item. For more information, see *General settings*, *on page 63*.

Orders that the customer has not finalised within 3 days are marked in the *Orders* column with the ⚠ icon. In a case like this, you can remind your customers to complete their purchase via e-mail. Use the corresponding batch action for this.

The following batch commands can be performed:

Table 16: Batch processing commands for eBay orders

Command	Comment
Send feedback	The *Feedback* and the *Feedback text* fields contain the default settings from the eBay settings; see *General settings*, *on page 63*. These entries can be changed if necessary. The command sends the feedback information entered for all selected items.
Resend reminder mail	After the item ends, the buyer receives an automatically generated e-mail, requesting him to make payment and thus to complete the transaction. See also *Configuration of notification e-mail*, *on page 63*. This command sends a reminder e-mail to customers that have not finalised the transaction.

Note: You can only provide feedback for each offer once. You cannot make a correction by submitting a second rating. As a seller, you can only provide positive ratings for buyers.

After payment by the customers with eBay, a corresponding order is created. You can display and edit these in the **Orders** item. eBay orders are indicated in the list of all orders by the eBay icon.

13. Glossary

Administration area	The Web pages that the technical administrator can use after signing in, to fulfil his responsibilities.
Administration page	The Web page displayed after signing in, where all functions are listed. You can access all the functions you need from this page. The menu bar and sidebar, and the working area, are embedded here.
Administrator	The operator of a Web site. This Web site allows the Administrator to provide content and also offer products and services. The available functions are provided according to the type of Web site selected. Moreover, there are comprehensive options for customising the design and layout of the site.
Attribute	A freely-definable descriptor for a product or customer. Attributes are used to define properties, for example, prices, dimensions, colours, and so on.
Attribute types	You can define various types of variables. The type of variable controls how it is processed by the system. For more information, see *Attribute types*, *23*.
Batch processing	A command that affects multiple elements at one time; This option is offered in tables where multiple instances of the same action can be combined into a multiple or batch process, for example, deleting multiple lines in a table at once.
Button	A function area on Web pages used to trigger actions; They are usually graphically designed to look like buttons.
Caps-lock key	A key that switches on capitalisation permanently. Deactivate this feature by pressing the key again. When this key is activated, this is usually indicated by a small light on the keyboard.
Catalogue	This term describes the entire inventory of all the products. The catalogue is the equivalent of a mail-order catalogue. Categories are used to set up structured hierarchies.
Category	A subgroup of a catalogue; Categories act as containers for product groups, such as computers, office supplies and shoes.
Check box	A field in a form which is selected or cleared by clicking it with the cursor. It is used to make specific selections.
Cookie	A small file containing text information that is sent from a Web server to a Web browser. This information is saved on the hard drive and can be retrieved later. Cookies are often necessary for Internet applications. See also *Session cookies*.
Currency format	A currency-dependent format for price information. The system formats the prices according to the set currency.
Default setting	The status of the attributes; If this status has been set, the attribute or the value will be used as the default value until the user makes a different selection.

Duplicate	This creates an exact copy (apart from the ID). This is helpful, for example, when creating products from a template product (if one exists), from which a majority of the attributes can be transferred.
Entry field	This is a field in a form where the user can enter information.
Favourite	Web pages that are opened and used repeatedly. A favourite page is saved as a link in a special folder and can be opened with a single click.
FTP	File Transfer Protocol; FTP is a method of transmitting data over networks. This is used to transfer files between different computers, regardless of the operating system and location.
HTML	(Hyper Text Markup Language) source code for Web pages that determines how the content is displayed. Individual HTML formatting instructions are called HTML tags.
ID	This is a unique identifier that is used to locate a data element (product, customer, attribute, etc.). The ID is used in the database and is not the same as the name displayed on the Web site. Furthermore, IDs serve to uniquely classify data when exporting and importing and to manage objects in multiple languages.
Link	A link to another Internet page or to a document.
Localisation	Preparation of the data and content of a Web page so it can be displayed in another language. Some attributes can be localised. This means that you can enter different values for these attributes in different languages. They are then displayed in the respective language, for example, descriptions or names.
Merchants	The merchant is an administrator who sells products online. The Web site and Administration provide the additional functions required for this task.
Multifunction bar	Area of the Web page that contains various functions for editing content. Similar functions are classified into function groups. For more information, see *Multifunction bar and content*, *on page 94* and *Multifunction bar and content*, *on page 117*.
Name	Name of a language-dependent object or method in the administration area and on the Web site. In this way, a descriptive name can be displayed in any language on the Web pages.
Navigation bar	Active area with a structure of links for selecting specific functions.
Navigation history	Navigation bar that shows how you arrived at your current location in the program. The individual hierarchy levels are shown as links so that you can go backwards one step at a time.
Option button	A field in a form which requires you to make a decision; Option buttons allow you to select just one option from several possible options.

Page elements	Page elements are functions or functional areas that you can place on your web site and move using drag & drop. You can place the page elements in quick design or in advanced design. Examples of page elements: - *Tree view of pages as box* - *Signing in* - *Link to home page* - *Country selection using flags*
PangV	German Price Indication Ordinance; This sets forth which regulations a merchant must observe when setting prices in Germany. For a version of these regulations in German, see http://bundesrecht.juris.de/bundesrecht/PangV/
Path / File path	Information about the location of a file on a storage medium, for example, C:\windows\system32\notepad.exe.
Pixel	A pixel is the smallest graphical unit that a computer can display.
Provider	Providers provide hardware and software solutions. Usually, consulting services are also offered.
Reference unit	The base unit of quantity used for comparing products by reverse calculating the price of the products. For more information, see *Reference unit*, *on page 71*.
Session cookies	A session cookie is a piece of text that is written to the browser's memory when specific Web pages are opened (at the beginning of a session). This session cookie provides the authorisation details needed for you to use all the functions on the Web site. After signing out or closing your browser (to end a session), the session cookie is deleted.
Shop	A Web site that provides functions that allow products to be sold online. Merchants can use this to build up an Internet sales channel.
Shop types	Product of the provider that he sells or leases to merchants or shop operators. Each shop type is provided with specific functions and in varying price classes. Merchants create their own shops by selecting from among these shop types.
Sign in/signing in	A procedure for obtaining access to an application by entering a user name and password. Frequently, the combination of both a user name and password is called sign-in information.
Sub menu	A menu, the functionality of which changes according to the chosen working area.
Text field	The field in a form where you can type a large amount of text. This can be used to compose descriptions or other information. Text fields can be edited using a WYSIWYG editor. For more information, see *Working with text fields*, *on page 26*.
Tool tip	A short informational text that is displayed automatically when you move the cursor over a specific area. The presence of a tool tip is often indicated by an icon next to an entry field.

Upload	If you want to publish files or pages on the Internet, you must copy them to a server. This copying procedure (from a local computer to a foreign computer) is called uploading.
URL	An abbreviation for Uniform Resource Locator, the unique Internet address of a Web page. The URL is used to open the page in a browser.
Variable	Variables are placeholders for concrete values which are first entered by the user or program when the Web site is online.
Visibility	The status of data; this determines whether these data can be seen by the customer in the Web site or not.
Web site	An Internet application that contains all the functions required to offer products or services or content. This application generates the Web site on the basis of a predefined type configured by the provider. The Administration area allows the layout and design of the site to be customised and the content to be managed.
Working area	The portion of the administration page in which data and tables are displayed and managed. The content depends on the function selected in the menu.

14. Index